

**[INF-10956] [Forecast Evaluator - Update Forecast Events to support new Actuals](#)** Created: 09/Aug/18 Updated: 04/Sep/18 Resolved: 04/Sep/18

<b>Status:</b>	Done
<b>Project:</b>	<a href="#">InFORM</a>
<b>Components:</b>	None
<b>Affects versions:</b>	None
<b>Fix versions:</b>	<a href="#">2018.R4</a>

<b>Type:</b>	Story	<b>Priority:</b>	3.Medium
<b>Reporter:</b>	<a href="#">Staten Putnal (Inactive)</a>	<b>Assignee:</b>	<a href="#">Will Englefield</a>
<b>Resolution:</b>	Done	<b>Votes:</b>	0
<b>Labels:</b>	None		
<b>Σ Remaining Estimate:</b>	0 minutes	<b>Remaining Estimate:</b>	Not Specified
<b>Σ Time Spent:</b>	3 days, 3 hours, 1 minute	<b>Time Spent:</b>	Not Specified
<b>Σ Original Estimate:</b>	3 days, 6 hours, 30 minutes	<b>Original Estimate:</b>	Not Specified

**Attachments:**  [INF-10956 - AutoAdjustment Validation.sql](#)

**Issue links:** **Implement**  
 implements [INF-10407](#) Forecast Evaluator - Include Discount... Closed

Sub-tasks:	Key	Summary	Type	Status	Assignee
	<a href="#">INF-11012</a>	<a href="#">Modify Finalize Day logic to implemen...</a>	DEV Task	Closed	Michael DeBinder
	<a href="#">INF-11013</a>	<a href="#">Modify Manage Event logic to implemen...</a>	DEV Task	Closed	Michael DeBinder
	<a href="#">INF-11014</a>	<a href="#">Modify Forecast Pipeline logic to imp...</a>	DEV Task	Closed	Michael DeBinder
	<a href="#">INF-11015</a>	<a href="#">DIT</a>	DEV Task	Closed	Michael DeBinder
	<a href="#">INF-11016</a>	<a href="#">Functional Review w/QA</a>	DEV Task	Closed	Michael DeBinder
	<a href="#">INF-11018</a>	<a href="#">Create Test Cases/Research data</a>	QA Task	Closed	Soma Dixon
	<a href="#">INF-11019</a>	<a href="#">Review Test Cases</a>	QA Task	Closed	

	<a href="#">INF-11020</a>	<a href="#">Deploy</a>	QA Task	Closed	Soma Dixon
	<a href="#">INF-11021</a>	<a href="#">Execute Test Cases</a>	QA Task	Closed	Soma Dixon
<b>Sprint:</b>	InFORM 2018.4 - Sprint 5				
<b>LOE DEV:</b>	2				
<b>LOE QA:</b>	3				
<b>Estimate:</b>	3				
<b>Performance Testing Required:</b>	No				

## Description

### Story

As an Operator, I would like Forecast Events for any store using an AWS forecast to use the new formula of System Gross - CFA Cards – Tax.

### Summary of the Feature

When displaying Actual Sales \$ amount in InFORM, relating to Forecasting, the Actual value is the same as Net Sales, the formula for this is:

- System Gross(+Tax) – Refunds – Promos – Discounts – CFA Cards - Tax  
However, the value used by Quantiphi, when generating the forecast in AWS, is what is being termed the "Gross Actual", which is:
- System Gross(+Tax) – Refunds – CFA Cards - Tax

These Actuals, when used in forecasting, and displayed in the UI (forecast Evaluator) come from the Aggregated Forecast tables, where the Actuals are stores as a value.

The discussed plan to support this new "Gross Actual" value was to do the following:

1. Enhance any forecasting aggregation processes that populate the Actual Sales \$ amount, to support the aggregation and saving of the new "Gross Actual" value, at the same intervals as the Actuals are stored
2. Enhance the Forecast Evaluator to use the "Gross Actual" value when displaying data for a day whose forecast has been imported (forecast header record contains an External Generation Time)
3. Enhance the Forecast Events pipeline to use the "Gross Actual", rather than the InFORM Actuals (Net Sales), when updating the system forecast to account for events created for restaurants whose forecast is imported from AWS.
  - *Note: No change is required for the Events Reversal as the reversal pipeline is skipped for imported forecasts*

4. Update the Impacting Events section of the **new** MxC Finalize Day Page to be labeled and use "Gross Actual", for display and variance calculation, rather than Net Sales

### Detail

- When the adjustment amount for a day included in an Auto Event is calculated, the Gross Actual should be used for the Actual, rather than Net Sales
- The Forecast Events for any days using the AWS Forecast should use the new formula defined in [INF-10952](#) Done when determining Actuals to calculate the System forecast
- Any store using the InFORM forecast values should continue to use the original formula.

### Acceptance Criteria

1. Confirm that new Gross Actual value will be used when calculating Forecast Event Adjustment for days that are using Imported Forecasts.
2. Confirm that current Forecast Events logic remain the same for stores with InFORM generated forecast.

### Comments

Comment by [Will Englefield](#) [ 27/Aug/18 ]

[Soma Dixon](#) Per feedback from CFA, I have updated "Gross Actual - Tax" to be "Gross Actual"

CC [Michael DeBinder](#)

Comment by [Michael DeBinder \(Inactive\)](#) [ 27/Aug/18 ]

[Will Englefield](#) [Soma Dixon](#)

The code and validation script reflect our decision to change this logic to use ONLY the Forecasted and Actual "Inside Sales" data when calculating the ratio. The original version included Catering \ Pickup data which may have skewed certain intervals.

Comment by [Soma Dixon](#) [ 31/Aug/18 ]

cc: [Will Englefield](#)

Comment by [Will Englefield](#) [ 04/Sep/18 ]

Note: it is possible that a Imported Forecast store could end up with an Auto Event that is a combination of the adjustment being based on Actuals and Gross Actuals. Those before the deployment of R4 will use Actuals, and those after could use Gross Actuals

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