

## Lane Forecast Module (Free Trial Instructions)

Please follow these steps to experience Hitachi Solutions for Transportation (Lane Forecast Module):

1. Navigate to **Sales > Lane Opportunity > (Open Record) Trucking, Inc. Shipment Opportunity**
  - a) As a Sales Manager, you are planning to complete a sales opportunity with associated contracts for one of your customers, **Trucking, Inc.**
2. From the record, navigate to the **Lane Forecast** section of the form and add the forecast [Trucking, Inc. ATL - TX](#) by selecting the **+** and searching.
  - a) Once the Lane Forecast is added, follow the Lane Opportunity record through the two stage Lane Opportunity Business Process Flow and in the **Discover** stage select **Pricing Proposal** for **Purchase Process**, type in **500,000 for Estimated Revenue**, select **Yes** for **Applied Lane Forecast**, and then select **Next Stage** to move into **Close** stage.
  - b) In the **Close** stage, navigate to the **Print Lane Forecast Contract** in the top bar and select to pull in opportunity information and send out to customer.
  - c) While on the phone with the **Trucking, Inc.** discussing the contract, you want to understand if you might have more lane opportunities to discuss with client. Navigate to the **Lane Activity Report** in the top ribbon and discuss YTD Lane Revenues and any opportunities that might be open based on current routes.
  - d) Once signed contracts are received we want to close the opportunity. In the Close stage, select **Yes** for **Send Thank You Note** and select **Won** for **Close As**. This will allow you to close/won by lane forecast line item for better reporting on what is being quoted and what is being won by specific clients.
3. Navigate to **Sales > Dashboards > (Hitachi) Lane Activity and Monthly Volumes**

Later, you are meeting with your manager and want to review the all up numbers for the month. This report allows you to understand your totals on lane volumes, commodities, and terminal information.