

# Build Smarter Projections with Forecasting Settings

Use forecasting to set revenue expectations by event type and menu item category across your locations. These estimates help your team plan, set goals, and generate more accurate financial reports—all based on the bookings, events, and menu items you actually book.

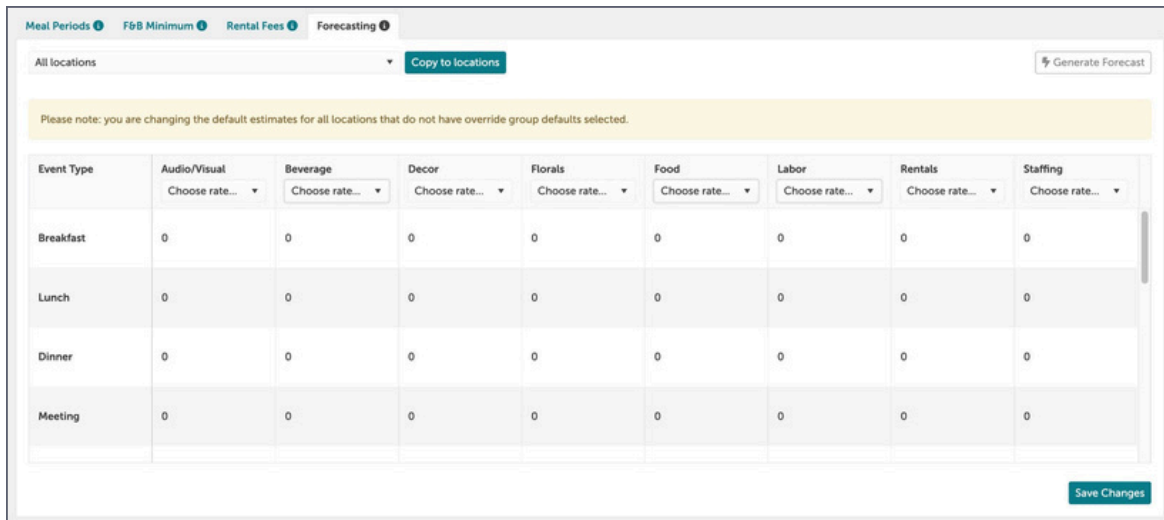
## 1. Open the Forecasting Table

### Settings > Advanced Location Settings > Forecasting

- Go to the Forecasting tab to begin setting up revenue estimates

**Note:** Only users with Settings access can view and edit the Forecasting tab.

- You'll see a table where:
  - Each row is an event type
  - Each column is a Menu Item Category (MIC), such as Food or Beverage



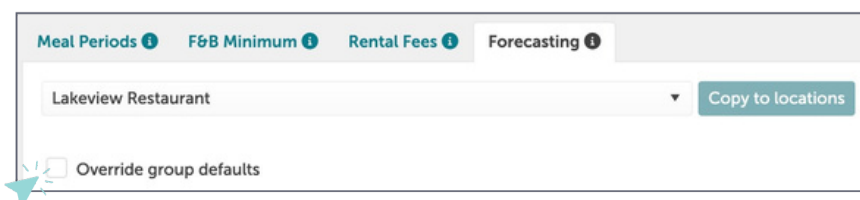
Event Type	Audio/Visual	Beverage	Decor	Florals	Food	Labor	Rentals	Staffing
Breakfast	0	0	0	0	0	0	0	0
Lunch	0	0	0	0	0	0	0	0
Dinner	0	0	0	0	0	0	0	0
Meeting	0	0	0	0	0	0	0	0

## 2. Choose and Manage Locations

- Use the dropdown at the top to select which location you want to edit
- By default, the table is set to **All Locations** – this acts as a template or “default” for all locations

**Note:** Only Customer Admins can edit the All Locations (default) forecasting table. Other users will be able to view it but cannot make changes.

- If you are a location admin and want to enter custom forecasts for a specific location, choose that location and check the box to **Override group defaults**



Meal Periods ⓘ F&B Minimum ⓘ Rental Fees ⓘ Forecasting ⓘ

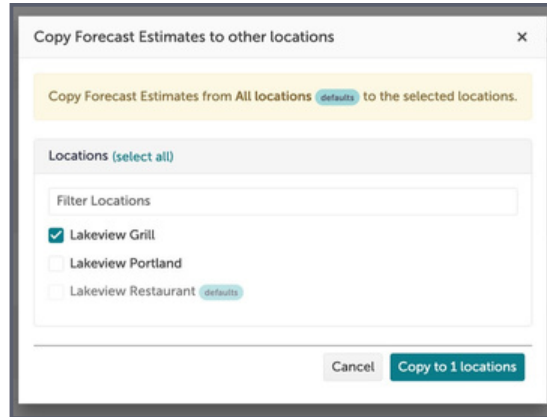
Lakeview Restaurant ▼ Copy to locations

Override group defaults

### Copy Forecasts to Other Locations

After entering values for a specific location, you can save time by copying them to others.

- Click the **Copy to Locations** button next to the dropdown
- Select one or more locations in the popup window
- Click **Apply** to copy your values



### Understand Default vs. Location Forecasts

When you enter values in the **All Locations** table, those are treated as your default settings. In the location dropdown:

- Locations using the default settings will show a “Defaults” label
- Once a location has its own custom values, the label disappears
- You can always update or remove overrides for any location

**Note:** The All Locations table includes all event types and MICs used anywhere in your group. Defaults will only apply to a location if that event type or MIC exists there.

## 3. Enter Forecast Values

Before entering values:

- Choose a **rate type** for each MIC:
  - Flat Fee – the estimate applies once per event
  - Per Person – the estimate multiplies by the guest count
- Then, enter your revenue estimates in the table and click **Save**
- These estimates will automatically apply to new events created with matching event types and locations

Event Type	Audio/Visual Flat fee	Beverage Per person	Decor Flat fee	Florals Flat fee	Food Per person	Labor Per person	Rentals Per person	Staffing Per person
Breakfast	0	\$12.00	0	\$300.00	\$35.00	\$10.00	0	0
Lunch	0	\$18.50	0	0	\$46.50	\$14.50	0	0
Dinner	0	\$25.40	0	0	\$68.60	\$23.00	0	0
Meeting	\$0.00	\$23.50	\$0.00	\$0.00	\$62.00	\$21.00	\$0.00	\$0.00

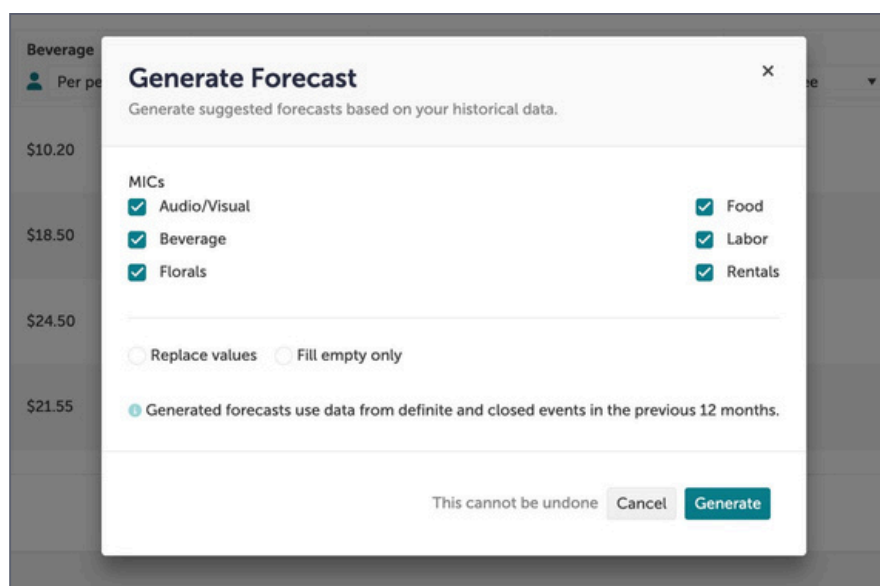
## 4. Generate Forecasts Based on Past Events

Don't want to manually enter every value? Let Tripleseat do the work

- Click the **Generate Forecast** button in the top right
- Choose whether to generate values for all MICs or select specific ones
- Select:
  - Replace values – overwrite everything
  - Fill empty only – only add where no value exists
- Click **Generate**

Tripleseat will use the last 12 months of your actual event data to estimate revenue for each event type and MIC combination.

**Pro-Tip:** The **Generate Forecast** button will be inactive if there are any unsaved changes on the page; be sure to click **Save** first to use the button.



Once you've configured your forecasting settings, the next step is to see how those forecasts appear on your events and how to adjust them when needed.

Continue to: [Keep Event Projections Accurate with Forecasting](#)

This guide will walk you through viewing, editing, and understanding forecasts at the event level.

**👤 Need a visual walkthrough?** Check out our [Forecasting for Hotels Overview videos](#) on Tripleseat University for a quick tour of the feature in action.