

MY PLANS SHARED PLANS

ADD PLAN Sort by: [dropdown]

Search a plan

Basic Setup

Forecast Name
1 Widget Products & Services

Description
2 Company 1

3 CREATE PLAN CANCEL

Once you have clicked on the **"Add Plan"** button, you can now create a **1 "Forecast Name"** and a **2 "Description"** for the plan.

Once you are happy with the name and the description, you can then click **3 "Create Plan"**.