User Group Forums 2013

FRx for Microsoft Dynamics® ERP
Customer Testimonial and Q&A

Session starts at 12:30am EDT/9:30am PDT

Hosted by: **MSXGROUP**

With special presentations by the Microsoft CPM team

Moderated by Noah Moseley

FRx Customer Testimonials and Q&A - AGENDA

12:30pm-1:30pm EDT (9:30am-10:30am PDT)

During this session, we will be addressing questions that were previously submitted as well as hear from users of FRx about their experiences with the product. We encourage audience participation during this conversation and appreciate your input.

Attendees will be muted but may ask questions via text using the GoToWebinar Chat or Question option. To ask questions verbally, please raise your hand by clicking the hand icon on the GoToWebinar control panel.

User Survey Responses
Favorite Things about FRx

- Easy to use and update reports
- Ability to mix and match row formats, column layouts, and trees to form your report
- Fast report generation
- FRx Drill down and export to Excel with account and transaction level
- Formatting of reports
- Report Manager
- Powerful reporting on any segments from your GL
- Backing up Specification Sets is relatively easy

User Survey Responses
Least Favorite Things about FRx

- Managing multiple tree definitions (have to remember which one to update)
- Lack of report organization to be able to group similar building blocks in folders
- Hard to navigate old Row, Column, and Tree formats to delete unnecessary ones
- Installation/technology problems
- Remembering to update Specification Sets when there are new accounts and departments

User Survey Responses
Specific Questions to Experts

- How can I run a consolidated Income Statement for my multiple companies?
- Is there a way to have two description columns?
- Outside of standard end-of-month financial reports, what do other FRx users typically use the software for?
- What are some "best practices" for reporting, formatting, etc?
- Will any improvements be made to FRx in the future?
- What kind of support is available and until what dates?
- As of now, when is the very last date that you would recommend using FRx and therefore migrating to Management Reporter (MR)?
- Will MR have FRx Report Manager functionality?

User Survey Responses
Specific Questions to Experts

- How do you link to external data like Excel?
- How do you incorporate new accounts into a Consolidated Unit structure?
- How do we create a report book for a month end financial packet?
- Any tips for easier way to set up new columns without having to re-type so much-seems so manual.

MSX Group Technical Support
Bill Thomas, Director of Customer Services

- Continuing to offer Annual Software Technical Support Plans for both FRx and Forecaster

- Every member of our Support Team has at least 10 years of experience supporting these products

www.MSXGroup.com/software-support
(877) 456-7632 | (303) 484-9671 | Bill.Thomas@MSXGroup.com

User Resources

Microsoft

- Microsoft.com
    - PartnerSource
    - CustomerSource
- https://connect.microsoft.com (for MR)
- http://blogs.msdn.com/b/dynamicscpm/

MSXGROUP

http://www.msxgroup.com
http://boards.msxgroup.com

Session slides will be made available to attendees later this week via email.

Thank you!

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Up next: **FRx Session 4 – Intermediate Session I** (Led by Nick Sercer)

Session starts at 2:00pm EDT/11:00am PDT

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