#### Session starts at 4:00pm Eastern (1:00pm Pacific)



Management Reporter

Forecaster

FRX

Prospero

#### User Group Spring Forums 2017

- Forecaster User Group Forum (Tuesday 3/14/17)
- Management Reporter User Group Forum (Wednesday 3/15/17)
- MSX Group Prospero User Group Forum (Thursday 3/16/17)

Register at www.msxgroup.com/2017-Spring-forums



#### Forecaster Users Forum

- Session 1: 11:00-12:00 Product Overview
- Session 2: 12:15-1:15 Beginner Training Session 1
- Session 3: 1:30-2:30 Intermediate Session 1
- Session 4: 2:45-3:45 Intermediate Session 2
- Session 5: 4:00-5:00 Additional Topics and Closing



#### Forecaster Users Forum

- Log In and Log Out at anytime throughout the day.
- Attendees will be muted but may submit text questions using GoToWebinar Question section.



### User Group Spring Forums 2017

Forecaster for Microsoft Dynamics<sup>®</sup> ERP SESSION 5: Creating your Q1 Forecast

Session starts at 4:00pm Eastern (1:00pm Pacific)



#### Forecaster Users Forum Agenda

4:00pm-5:00pm ET (1:00pm-2:00pm PT)

- Preparing for a 2017 Q1 Forecast
- Review of today's presentations
- Closing Remarks and Q&A



#### 2017 Q3 Forecast Setup

#### **SCENARIO**

We have completed our annual budget for 2017 using Microsoft Forecaster and this annual budget has been approved and locked.

We need to use Microsoft Forecaster to complete our Q1 forecast for the year as soon as March actuals are available.



#### 2017 Q3 Forecast Setup

- Periods
- New Column Sets
- New Input Sets
- New Reports

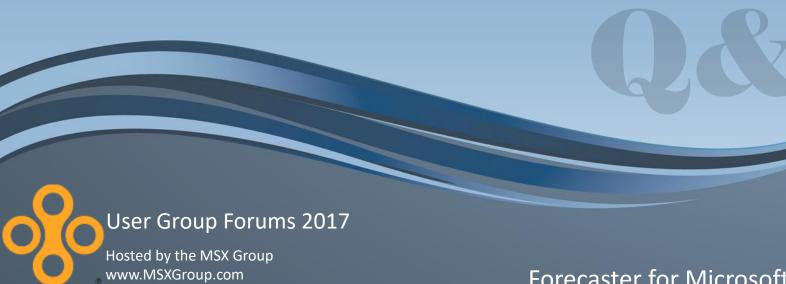
- Update Menus
- Import Actuals
- Copy Budget Balances to the Forecast



#### Users Forum Recap, Closing & Q&A

- New Budget Setup
- HR Detail Setup
- Capital Setup
- Revenue Setup

- Balance Sheet Budgeting
- Cash Flow Budgeting
- New Forecast Setup



## PARTNERS













## 2017 EVENTS

## **Amplify**



Microsoft

March 19-21, 2017 Anaheim, CA



May 7-12, 2017 St. Louis, MO



Sept 13-15, 2017 Tampa, FL



# October 10-13, 2017









Nashville, TN



User Group Forums 2017

Hosted by the MSX Group www.MSXGroup.com

# Fall User Forums

- September 19, 2017 Forecaster Users Forum
- September 20, 2017 Management Reporter Users Forum
- September 21, 2017 Prospero Users Forum



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## Thank you!

## User Group Spring Forums 2017

**Forecaster** for Microsoft Dynamics<sup>®</sup> ERP *Tomorrow* Management Reporter Users Forum

Session starts at 11:00am Eastern (8:00am Pacific)

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