User Group Forums 2013

Forecaster for Microsoft Dynamics® ERP

Beginner Training Session

Session starts at 11:00am EDT/8:00am PDT

Hosted by: **MSXGROUP**

With special presentations by the Microsoft CPM team

Presented by Noah Moseley

Forecaster Beginning Training Session - AGENDA

11:00am-12:15pm EDT (8:00am-9:15am PDT)

During this session, we will see how a basic P&L budget can be setup using Forecaster right out of the box. Witness a new implementation of Forecaster where GL segments are populated, summary rollups are created, and budget input templates are designed.

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.

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Forecaster for Microsoft Dynamics ERP

Implementing Forecaster

During a basic implementation of Forecaster, the following items must be created:

- Periods
- Segments (Segment ID's, Segment Rollups)
- Input Sets (Line Set, Column Set, Calculation Set)

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Implementing Forecaster

PERIODS

- Tools>Wizards>Periods Wizard
  - Periods for Budget, Actual, Forecast Periods
  - Monthly, Quarterly, Yearly

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Implementing Forecaster

SEGMENTS

- Setup>Segments
  - CENTERS
  - ACCOUNTS
- Setup>Segments>Rollup
  - Rollups for all segments

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Implementing Forecaster

INPUT SETS

- Build>Columns/Lines/Calculations
    - Column Sets
    - Line Sets
    - Calculations Sets
- Setup>Budgets>Input Sets
    - Input Sets for Budget Input, Forecast Input, Actual Imports

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User Resources

Microsoft

- Microsoft.com
  - PartnerSource
  - CustomerSource
- https://connect.microsoft.com
- 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.

Implementing Forecaster

ADDITIONAL SETUP

- Reports
- Allocations
- Tasks
- Multi-Currency
- Security
- Workflow

- HR Detail
- Capital Detail
- Revenue Detail
- Menus
- Spread Methods

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Forecaster for Microsoft Dynamics ERP

Thank you!

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Forecaster for Microsoft Dynamics® ERP

Beginner Training Session

Up next: **Forecaster Session 3 – Customer Testimonials and Q&A**

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

Email us at:
Derek.Krebs@MSXGroup.com
Nick.Sercer@MSXGroup.com
Noah.Moseley@MSXGroup.com

Locate us also at:
(866) 456-7632
www.MSXGroup.com
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