

Session starts at 12:15pm Eastern (9:15am Pacific)



Management Reporter
Forecaster
FRx
Prospero

User Group Fall Forums 2016

- Forecaster User Group Forum (Monday 9/19/16)
- Management Reporter User Group Forum (Tuesday 9/20/16)
- MSX Group Prospero User Group Forum (Wednesday 9/21/16)

Register at www.msxgroup.com/2016-fall-forums



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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



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Forecaster for Microsoft Dynamics ERP

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.



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Forecaster for Microsoft Dynamics ERP

User Group Fall Forums 2016

Forecaster for Microsoft Dynamics® ERP

SESSION 2: Creating Basic Input Templates

Session starts at 12:15pm Eastern (9:15am Pacific)



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This session presented by Noah Moseley

Forecaster Users Forum Agenda

12:15pm-1:15pm ET (9:15-10:15am PT)

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 basic budget input templates are designed.



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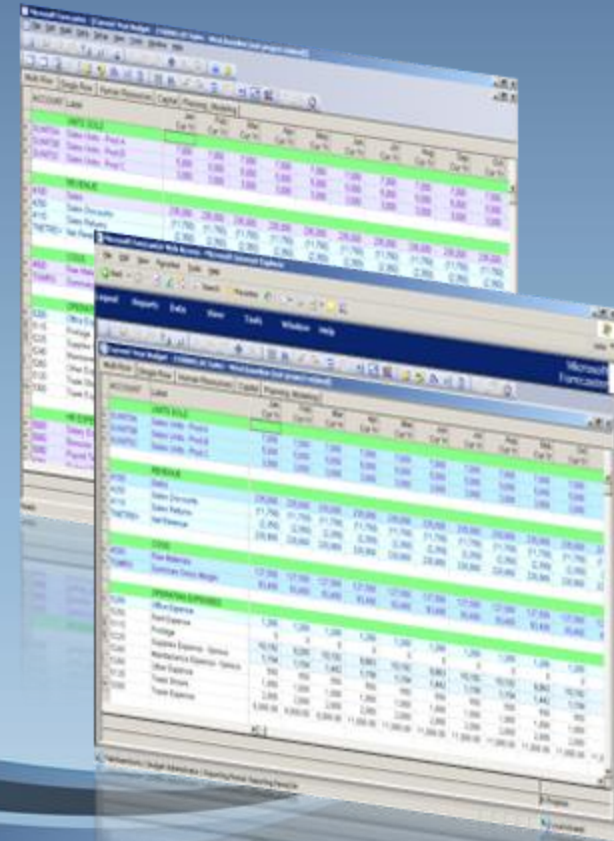
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Forecaster for Microsoft Dynamics ERP

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)**
- **Reports**
- **Security**



The image shows a screenshot of the Microsoft Dynamics ERP Forecaster application. It features several overlapping windows displaying financial data in a grid format. The data is organized into sections with green headers, including 'SALES', 'EXPENSES', and 'TOTALS'. Each section contains multiple rows of data with columns for various financial metrics and time periods. The interface includes standard software elements like toolbars and window titles.



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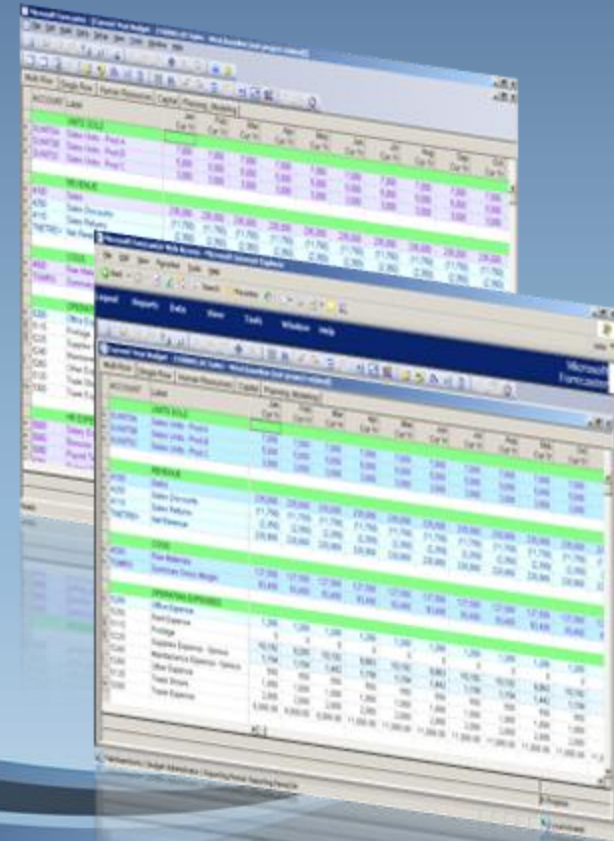
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Forecaster for Microsoft Dynamics ERP

Additional Forecaster Setup

Every implementation of Forecaster is unique. In addition to the setup work discussed so far, these other areas should be considered:

- Allocations
- Tasks
- Multi-Currency
- Workflow
- Spread Methods
- HR Detail
- Capital Detail
- Revenue Detail
- Menus



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Forecaster for Microsoft Dynamics ERP

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Thank you!

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Forecaster for Microsoft Dynamics® ERP
Up Next SESSION 3: HR, Capital & Revenue Details

Session starts at 1:30pm Eastern (10:30am Pacific)



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