

# User Group Forums 2015

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



Hosted by:

**MSXGROUP**

*With special presentations by the Microsoft CPM team*

# User Group Forums 2015

- FRx User Group Forum (Wednesday 04/22/15)
- Forecaster User Group Forum (Thursday 04/23/15)
- Management Reporter User Group Forum (Friday 04/24/15)

Visit [msxgroup.com/ffmr2015/](http://msxgroup.com/ffmr2015/) to register



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# 2015 FRx User Group Forums

Session 1: 11:00-12:00 Product Overview

Session 2: 12:15-1:15 Beginner Training Session

Session 3: 1:30-2:30 Intermediate Session 1

Session 4: 2:45-3:45 Intermediate Session 2

Session 5: 4:00-5:00 Open Town Hall Q&A

*\*All times are Eastern.*

*\*Log In and Log Out at anytime throughout the day.*

*\*Attendees will be muted but may submit text questions using the GoToWebinar Questions section.*



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FRx for Microsoft Dynamics ERP

# User Group Forums 2015

FRx for Microsoft Dynamics ERP



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**MSXGROUP**

Presented by: Nick Sercer

# FRx Application Overview - AGENDA

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

- **What is FRx?**
- **Business Benefits**
- **Key Features and Functionality**
- **Product Demonstration**

*Attendees will be muted but may ask questions via text using the GoToWebinar Chat or Question option.*



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FRx for Microsoft Dynamics ERP

# What is FRx?

**FRx is a Financial Reporting application designed to enable accounting and finance professionals to create and maintain their own reports.**

- Streamlined reporting that doesn't require IT assistance
- Direct integration with the General Ledger
- If it's recorded in the GL, you can use FRx to report on it
- Proven design approach



# Business Benefits

- Real-time results without IT assistance
- Custom reports based on GL data
- Saves time –
  - Speed up month-end reconciliation
  - Quickly generate reports month after month
  - Automate report distribution
- Boardroom quality reports



# Key Features & Functionality

- Building block approach to report design
  - Rows
  - Columns
  - Reporting Trees
- Mix and Match
- Run-time options
  - Report date
  - Level of detail
  - Output





# Report Design in FRx

**Fabrikam Works, Inc.**  
**Income Statement**  
**San Francisco Region**  
**For the Eight Months Ending Wednesday, August 31, 2011**



Rows defined in Row Definition

Departmental type reports from Tree Definition

**Revenue**  
 Sales  
 Sales Returns  
 Sales Discounts  
**Net Sales**  
  
 Cost of Goods Sold  
**Gross Margin**  
  
**Operating Expenses**  
 Salaries and Wages  
 Office Expense  
 Rent Expense  
 Travel Expense  
**Total Operating Expenses**  
**Net Income From Operations**

August	YTD
285,652	2,185,635
5,241	30,194
17,468	132,870
<b>262,943</b>	<b>2,022,571</b>
173,379	1,318,795
<b>89,564</b>	<b>703,776</b>
41,728	318,607
8,548	65,259
6,076	46,387
5,499	41,991
<b>61,851</b>	<b>472,244</b>
<b>27,712</b>	<b>231,531</b>

Columnar content from Column Definition



# Reusable Building Blocks

Same Row Definition

<b>Revenue</b>
Sales
Sales Returns
Sales Discounts
<b>Net Sales</b>
Cost of Goods Sold
<b>Gross Margin</b>
<b>Operating Expenses</b>
Salaries and Wages
Office Expense
Supplies Expense
Rent Expense
Travel Expense
<b>Total Operating Expenses</b>
<b>Net Income From Operations</b>

**FABRIKAM WORKS, INC.**  
**Detailed Income Statement**  
 For the Eight Months Ending Wednesday, August 31, 2011

Different Column Definition

Actual	Budget	Fav/(Unfav)
1,236,044	417,254	818,790
10,971	7,499	(3,472)
36,565	24,997	(11,568)
<b>1,188,508</b>	<b>384,757</b>	<b>803,751</b>
878,242	244,378	(633,864)
<b>310,266</b>	<b>140,379</b>	<b>169,887</b>
98,466	67,868	(30,598)
39,543	18,673	(20,869)
22,382	5,943	(16,439)
12,112	9,335	(2,777)
7,694	7,908	214
<b>180,197</b>	<b>109,728</b>	<b>(70,469)</b>
<b>130,069</b>	<b>30,651</b>	<b>99,418</b>



# Product Demonstration:

# FRx



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FRx for Microsoft Dynamics ERP

# User Resources

**Microsoft**

- Microsoft.com
  - PartnerSource
  - CustomerSource
- <https://connect.microsoft.com>
- [http://blogs.msdn.com/b/dynamics\\_financial\\_reporting](http://blogs.msdn.com/b/dynamics_financial_reporting)



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FRx for Microsoft Dynamics ERP

Thank you!

# User Group Forums 2015

## FRx for Microsoft Dynamics ERP

**Up next:** FRx Beginner Training *at 12:15 EDT/9:15 PDT*

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