

# User Group Forums 2015

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



Hosted by:

**MSXGROUP**

# 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)



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• [www.MSXGroup.com](http://www.MSXGroup.com)

# 2015 Forecaster 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 and Closing

*\*All times are Eastern.*

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

*\*Attendees will be muted but may submit text questions using GoToWebinars Question section.*



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Forecaster for Microsoft Dynamics ERP

# User Group Forums 2015

Forecaster for Microsoft Dynamics® ERP  
Product Overview Session

Session starts at 11:00am ET/8:00am PT



Hosted by:

**MSXGROUP**

This session presented by Derek Krebs of the MSX Group

# Forecaster Application Overview - AGENDA

**11:00am-12:00pm ET (8:00-9:00am PT)**

- **What is Microsoft Forecaster?**
- **Budgeting Challenges using Spreadsheets**
- **Microsoft Forecaster Benefits**
- **Product Demonstration of Main Features & Functionality**

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



# What is Microsoft Forecaster?

- Purpose built financial budgeting, planning and forecasting application
- Pre-built modules for modeling Revenue, Expenses, Human Resources and Capital detail
- Extras like Workflow, Audit Trail, Allocations, Foreign Currency, Top Down Adjustments, Reporting, and more!

The screenshot displays the Microsoft Forecaster application interface, which is a financial planning and budgeting tool. It features a multi-tiered grid structure for data entry and analysis. The top window shows a summary view with columns for months (Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct) and a 'Cur Yr' column. Below this, a detailed table lists various financial accounts and their values. The bottom window shows a similar but more granular view, including categories like 'OPERATING EXPENSES' and 'HUMAN RESOURCES'.

ACCOUNT	Label	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Cur Yr
UNITS SOLD												
SUNTSA	Sales Units - Prod A	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000
SUNTSB	Sales Units - Prod B	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
SUNTSC	Sales Units - Prod C	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
REVENUE												
4100	Sales	225,000	225,000	225,000	225,000	225,000	225,000	225,000	225,000	225,000	225,000	225,000
4110	Sales Discounts	(1,750)	(1,750)	(1,750)	(1,750)	(1,750)	(1,750)	(1,750)	(1,750)	(1,750)	(1,750)	(1,750)
4120	Sales Returns	(2,300)	(2,300)	(2,300)	(2,300)	(2,300)	(2,300)	(2,300)	(2,300)	(2,300)	(2,300)	(2,300)
NETREV	Net Revenue	220,950	220,950	220,950	220,950	220,950	220,950	220,950	220,950	220,950	220,950	220,950
COGS												
4200	Raw Materials	220,900	220,900	220,900	220,900	220,900	220,900	220,900	220,900	220,900	220,900	220,900
4210	Operating Expenses	127,500	127,500	127,500	127,500	127,500	127,500	127,500	127,500	127,500	127,500	127,500
4220	Human Resources	93,400	93,400	93,400	93,400	93,400	93,400	93,400	93,400	93,400	93,400	93,400
4230	Travel Expense	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200
4240	Postage	0	0	0	0	0	0	0	0	0	0	0
4250	Supplies	10,182	9,395	10,182	9,395	10,182	9,395	10,182	9,395	10,182	9,395	10,182
4260	Maintenance - Service	1,154	1,154	1,154	1,154	1,154	1,154	1,154	1,154	1,154	1,154	1,154
4270	Other Expense - Service	550	550	550	550	550	550	550	550	550	550	550
4280	Travel Shows	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
4290	Travel Expense	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000
4300	Summary Gross Margin	127,500	127,500	127,500	127,500	127,500	127,500	127,500	127,500	127,500	127,500	127,500



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Forecaster for Microsoft Dynamics ERP

# ***Budget Challenges using Spreadsheets***

- Too many spreadsheets, formulas, broken links
- Too much time to set up, error prone
- Difficult to collaborate, no workflow, security, and audit trail
- Issues with Data integrity, version control, and hard to consolidate and reorganize



# Forecaster Benefits

## Quicker Budgeting Cycle

- No broken links, formulas, and multiple spreadsheets
- Powerful, easy rollups for quick consolidation & reorganization
- Detail input and easy calcs for HR, Capital, Revenue
- Minimal year to year setup

## Budget Control

- Centralized setup stored in database
- Workflow, User and Group Security, Audit Trail
- Easy to Use! Microsoft Office spreadsheet design





**Product Demonstration:**

# Forecaster



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Forecaster 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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Forecaster for Microsoft Dynamics ERP

Thank you!

# User Group Forums 2015

Forecaster for Microsoft Dynamics ERP

**Up next:** Forecaster Beginner Training *at 12:15pm ET/9:15am PT*

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