

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 GoToWebinar's Question section.*



User Group Forums 2015
Hosted by the MSX Group

• www.MSXGroup.com

Forecaster for Microsoft Dynamics ERP

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)



User Group Forums 2015
Hosted by the MSX Group

• www.MSXGroup.com

User Group Forums 2015

Forecaster for Microsoft Dynamics® ERP

Beginner Training Session

Session starts at 12:15pm EDT/9:15am PDT

Hosted by:  **MSXGROUP**

Presented by Noah Moseley

Forecaster Beginning Training Session - AGENDA

12:15pm-1:15pm EDT (9:15am-10:15am 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.



User Group Forums 2015
Hosted by the MSX Group

• www.MSXGroup.com

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)

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



Implementing Forecaster

PERIODS

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

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



Implementing Forecaster

SEGMENTS

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

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



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

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



Implementing Forecaster

ADDITIONAL SETUP

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

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



User Group Forums 2015
Hosted by the MSX Group

• www.MSXGroup.com

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://www.msxgroup.com>

Training Classes | Consulting Services | Software Support



User Group Forums 2015
Hosted by the MSX Group

• www.MSXGroup.com

Forecaster for Microsoft Dynamics ERP

Thank you!

User Group Forums 2015

Forecaster for Microsoft Dynamics® ERP

Up next: Forecaster Session 3 – Intermediate Session I

Session starts at 1:30pm EDT/10:30am PDT

Email us at:

Derek.Krebs@MSXGroup.com

Nick.Sercer@MSXGroup.com

Noah.Moseley@MSXGroup.com

Locate us also at:

(877) 456-7632

www.MSXGroup.com

[Facebook.com](https://www.facebook.com)

[Twitter.com](https://twitter.com)



MSXGROUP

Consulting Services | Training | Software Support

2015 Forecaster User Group Forums

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 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 GoToWebinar's Question section.*



User Group Forums 2015
Hosted by the MSX Group

• www.MSXGroup.com

Forecaster for Microsoft Dynamics ERP