

User Group Forums 2016

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



Hosted by: **MSXGROUP**

User Group Forums 2016

- Management Reporter User Group Forum (Monday 03/21/16)
- Forecaster User Group Forum (Tuesday 03/22/16)
- FRx User Group Forum (Wednesday 03/23/16)

Visit msxgroup.com/ffmr2016/ to register



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2016

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 Question section.*



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Forecaster for Microsoft Dynamics ERP

User Group Forums 2016

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

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.



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Forecaster for Microsoft Dynamics ERP

What is Microsoft Forecaster?

- Purpose built financial budgeting, planning and forecasting application
- Included with your MSFT Dyn ERP!!!
- 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 used for financial budgeting and forecasting. It features a multi-tabbed window with several data tables. The primary table visible is a 'Planning Model' for 'Current Year Budget - 20100001 Sales - West America (not project related)'. This table is organized by account labels and includes columns for months (Jan to Dec) and a 'Sep' column. The data is categorized into 'UNITS SOLD', 'REVENUE', 'COGS', and 'OPERATING EXPENSES'. For example, under 'UNITS SOLD', 'Sales Units - Prod A' shows 7,000 units for each month. Under 'REVENUE', 'Sales' shows 225,000 for each month, while 'Sales Discounts' shows (11,750). Under 'COGS', 'Raw Mat' shows (2,350) and 'Summ' shows (2,350). The 'OPERATING EXPENSES' section includes 'Office Expense' (1,200), 'Rent Expense' (93,400), 'Postage' (1,200), 'Supplies Expense - Service' (10,192), 'Other Expense - Service' (1,154), 'Travel Expense' (2,000), and 'Travel Shows' (2,000). The interface also shows a 'Logout' button and a 'Reports' menu.



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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



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Forecaster for Microsoft Dynamics ERP

Forecaster Benefits

Shorter 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



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Forecaster for Microsoft Dynamics ERP

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://www.msxgroup.com>

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Forecaster for Microsoft Dynamics ERP

Thank you!

User Group Forums 2016

Forecaster for Microsoft Dynamics ERP

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



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