

User Group Forums 2016

Forecaster for Microsoft Dynamics® ERP



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/Prospero 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 GoToWebinars Question section.*



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Forecaster for Microsoft Dynamics ERP



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Forecaster for Microsoft Dynamics® ERP

Intermediate Session 2

Session starts at 2:45pm ET/11:45am PT



Hosted by:

MSXGROUP

Presented by Derek Krebs

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.



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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



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Forecaster for Microsoft Dynamics ERP

Implementing Forecaster

PERIODS

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



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Forecaster for Microsoft Dynamics ERP

Implementing Forecaster

SEGMENTS

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



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Forecaster for Microsoft Dynamics ERP

Implementing Forecaster

INPUT SETS

- Build > Columns/Lines/Calculations
 - Column Sets
 - Line Sets
 - Calculation Sets
- Setup > Budgets > Input Sets
 - Input Sets for Budget Input, Forecast Input, Actual Imports



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Forecaster for Microsoft Dynamics ERP

Implementing Forecaster

ADDITIONAL SETUP

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



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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



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Thank you!

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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

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