

Session starts at 11:00am Eastern (8:00am Pacific)



Management Reporter
Forecaster
FRx
Prospero

User Group Spring Forums 2017

- Forecaster User Group Forum (Tuesday 3/14/17)
- Management Reporter User Group Forum (Wednesday 3/15/17)
- MSX Group Prospero User Group Forum (Thursday 3/16/17)

Register at www.msxgroup.com/2017-Spring-forums



User Group Forums 2017

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Forecaster Users Forum

- 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 Additional Topics and Closing



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Forecaster for Microsoft Dynamics ERP

Forecaster Users Forum

- 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 Spring Forums 2017

Forecaster for Microsoft Dynamics® ERP

SESSION 1: General Overview

Session starts at 11:00am Eastern (8:00am Pacific)



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This session presented by Derek Krebs

Forecaster Users Forum 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**



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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 Dynamics 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 a multi-layered window. The top window shows a 'Current Year Budget' for 'Sales - West Area Inc (not project related)'. It features a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar. Below the menu is a 'Multi Row' view with tabs for 'Single Row', 'Human Resources', and 'Capital Planning Modeling'. The main data area is a table with columns for months (Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct) and 'Cur Yr'. The table is organized into sections: 'UNITS SOLD' (Sales Units - Prod A, B, C), 'REVENUE' (Sales, Sales Discounts, Net Revenue), 'COGS' (Prime Materials, Summarized Gross Margin), and 'OPERATING EXPENSES' (Office Expense, Rent Expense, Postage, Suppliers Expense - Service, Other Expense - Service, Trade Shows, Travel Expense). The bottom window shows a similar view for 'Sales - West Area Inc (not project related)' with a 'Reporting Period' dropdown set to 'Reporting Period'.



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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

Microsoft Forecaster



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Forecaster for Microsoft Dynamics ERP

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2017 EVENTS

Amplify

a collaboration between



March 19-21, 2017
Anaheim, CA

 **FOCUS** 17
AXUG CRMUG NAVUG PBIUG

May 7-12, 2017
St. Louis, MO

 **DSLUG** Fall
Conference
DYNAMICS SL USER GROUP

Sept 13-15, 2017
Tampa, FL



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October 10-13, 2017

Nashville 2017
Summit
AXUG | *bring it home.*

Nashville 2017
Summit
GPUG | *bring it home.*

Nashville 2017
Summit
NAVUG | *bring it home.*



Nashville, TN



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Fall User Forums

- **September 19, 2017** Forecaster Users Forum
- **September 20, 2017** Management Reporter Users Forum
- **September 21, 2017** Prospero Users Forum



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Thank you!

User Group Forums 2017

Forecaster for Microsoft Dynamics ERP

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



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