Session starts at 12:15pm Eastern (9:15am Pacific)

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

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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

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.

User Group Spring Forums 2017

Forecaster for Microsoft Dynamics® ERP

SESSION 2: Creating Basic Input Templates

Session starts at 12:15pm Eastern (9:15am Pacific)

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This session presented by Noah Moseley

Forecaster Users Forum Agenda

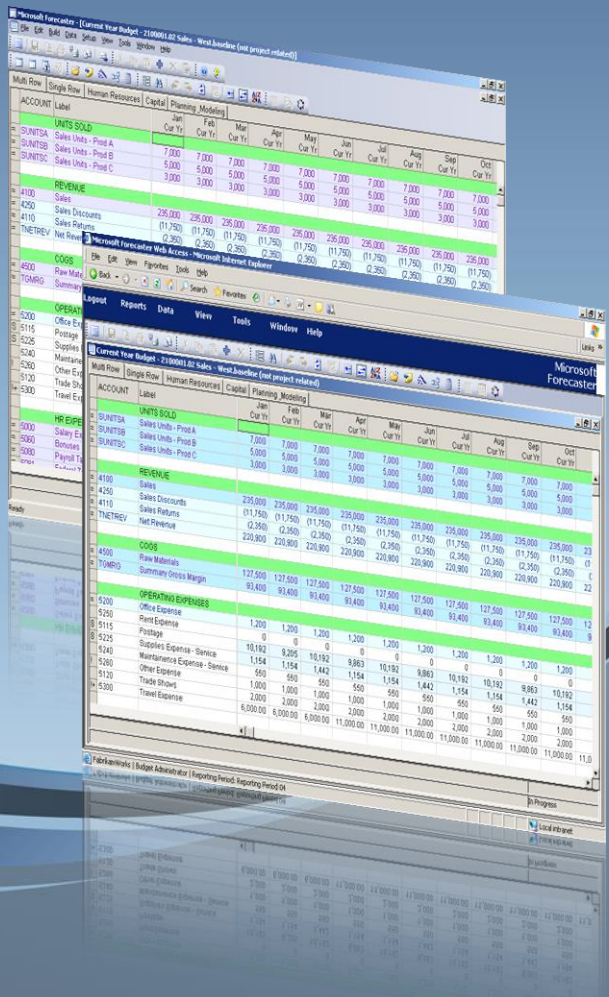
12:15pm-1:15pm ET (9:15-10:15am PT)

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 basic budget input templates are designed.

Implementing Forecaster

During a basic implementation of Forecaster, the following items must be created:

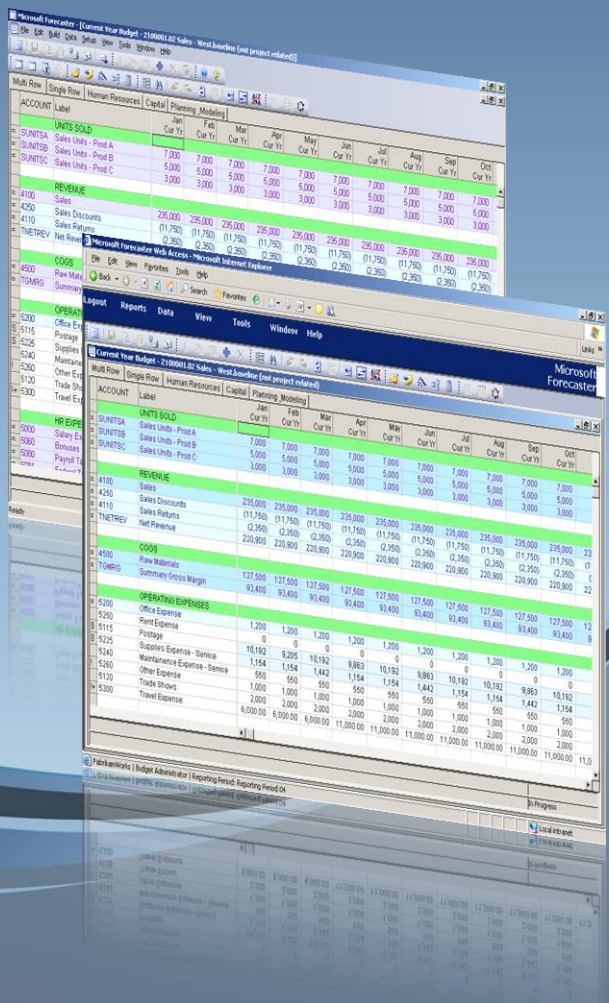
- **Periods**
- **Segments (Segment ID's, Segment Rollups)**
- **Input Sets (Line Set, Column Set, Calculation Set)**
- **Reports**
- **Security**



Additional Forecaster Setup

Every implementation of Forecaster is unique.
In addition to the setup work discussed so far,
these other areas should be considered:

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



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2017 EVENTS

Amplify | a collaboration between GPUG Microsoft

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
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October 10-13, 2017

Nashville 2017 Summit AXUG | bring it home.

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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 Spring Forums 2017

Forecaster for Microsoft Dynamics® ERP

Up Next SESSION 3: HR, Capital & Revenue Details

Session starts at 1:30pm Eastern (10:30am Pacific)

User Group Forums 2017

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