

Session starts at 4:00pm Eastern (1:00pm 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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www.MSXGroup.com

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 5: Creating your Q1 Forecast

Session starts at 4:00pm Eastern (1:00pm Pacific)



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This session presented by Noah Moseley

Forecaster Users Forum Agenda

4:00pm-5:00pm ET (1:00pm-2:00pm PT)

- **Preparing for a 2017 Q1 Forecast**
- **Review of today's presentations**
- **Closing Remarks and Q&A**



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Forecaster for Microsoft Dynamics ERP

2017 Q3 Forecast Setup

SCENARIO

We have completed our annual budget for 2017 using Microsoft Forecaster and this annual budget has been approved and locked.

We need to use Microsoft Forecaster to complete our Q1 forecast for the year as soon as March actuals are available.



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Forecaster for Microsoft Dynamics ERP

2017 Q3 Forecast Setup

- **Periods**
- **New Column Sets**
- **New Input Sets**
- **New Reports**
- **Update Menus**
- **Import Actuals**
- **Copy Budget Balances to the Forecast**



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Forecaster for Microsoft Dynamics ERP

Users Forum Recap, Closing & Q&A

- **New Budget Setup**
- **HR Detail Setup**
- **Capital Setup**
- **Revenue Setup**
- **Balance Sheet Budgeting**
- **Cash Flow Budgeting**
- **New Forecast Setup**

Q&A



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Forecaster for Microsoft Dynamics ERP

PARTNERS



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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 Spring Forums 2017

Forecaster for Microsoft Dynamics® ERP
Tomorrow Management Reporter Users Forum

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

www.msxgroup.com/2017-Spring-forums



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