



SPRING 2019

Next Session Will Begin Soon

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SPRING 2019

April 9, 2019

**Management Reporter
Microsoft Forecaster**

April 10, 2019

**Prospero Reporting
Prospero Budgeting**



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April 9, 2019

Management Reporter

Microsoft Forecaster

April 9, 2019

Management Reporter Microsoft Forecaster

11:00 AM EST

Management Reporter & D365 Financial
Reporting: Introduction

12:15 PM EST

Management Reporter & D365 Financial
Reporting: Beyond the Basics

1:30 PM EST

Microsoft Forecaster: Budgeting Overview

2:45 PM EST

Microsoft Forecaster: Advanced
Budgeting

4:00 PM EST

Converting to Prospero



SPRING 2019



Derek Krebs
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- **MSX Group** is the original team who developed, implemented and supported FRx, Forecaster, and Mgt Reporter the past 20+ years working at FRx/MSFT/MSX
- **Derek** has spent the last 22 years Consulting and Managing Consultants at Microsoft & MSX Group working strictly on Budgeting & Reporting Software;
- **Derek** has done over 300 client Implementations spanning 22 years; **MSX Group** has helped train, implement and support over 15,000 users!

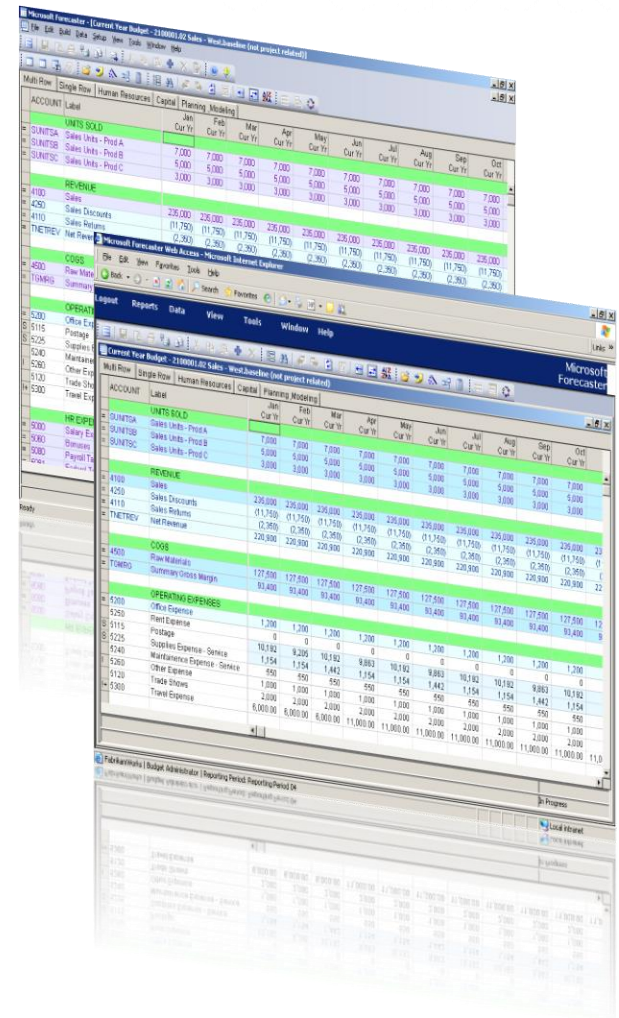
Microsoft Forecaster: Budgeting Overview

AGENDA

- What is Microsoft Forecaster?
- Budgeting Challenges
- Forecaster Solutions
 - HR Budget Creation
 - Re-forecasting
 - Report Distribution
- Product Overview
- Q & A

What is Microsoft Forecaster?

- Purpose built financial budgeting, planning and forecasting application
- 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!
- Used by 15,000+ users over the last 15 years!!



The screenshot displays the Microsoft Forecaster application interface, showing multiple overlapping windows. The primary window in the foreground is titled 'Microsoft Forecaster - Current Year Budget - 210000102 Sales - West.Baseline (not project related)'. It features a menu bar (File, Edit, Data, Setup, View, Tools, Window, Help) and a toolbar. The main content area is a financial data table with columns for months (Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct) and a 'Cur Yr' column. The table is organized into sections: 'UNITS SOLD', 'REVENUE', 'COGS', 'OPERATING EXPENSES', and 'TOTALS'. The 'UNITS SOLD' section includes rows for SUNTSA, SUNTSS, and SUNTSC. The 'REVENUE' section includes rows for 4100 Sales, 4110 Sales Discounts, 4115 Sales Returns, and 4120 Net Revenue. The 'COGS' section includes rows for 4200 Raw Materials and 4210 Freight. The 'OPERATING EXPENSES' section includes rows for 5100 Office Expense, 5110 Postage, 5120 Supplies, 5130 Maintenance, 5140 Other Exp, 5150 Trade Sh, and 5160 Travel Exp. The 'TOTALS' section includes rows for 4300 Operating Gross Margin, 4310 Operating Expenses, and 4320 Total. The bottom window shows a 'Budget Administrator' window with a 'Reporting Period Reporting Period' section.

Budgeting Challenges

- Too many spreadsheets, formulas, broken links
- Too much time to set up
- Difficult to collaborate without workflow, security, and audit trail
- Data integrity, version control, consolidation

Forecaster Benefits

- **Written by Microsoft and part of the Microsoft Dynamics suite!!!**
 - Extended Support until 2023**
 - Migration from Forecaster to MSX Prospero**
(same development, support staff, consultants)
- **Quicker Budgeting Cycle**
 - Minimal year to year setup
 - No broken links, formulas, and multiple spreadsheets
 - Powerful & easy rollups for quick consolidation or reorganization
- **Budget Control**
 - Centralized setup stored in database
 - Workflow, User and Group Security, Audit Trail
 - Easy to Use! Microsoft Office navigation, Spreadsheet design

Product Demo



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