BENEFITS

- **Speed up every aspect of the budgeting workflow.** Quickly map information from the general ledger, establish templates and calculation rules, coordinate multiple contributors, monitor progress on approvals, and make rippling revisions in real time.

- **Streamline reviews, analysis, and tracking.** Save time and eliminate errors caused by multiple spreadsheets or versions when you can organize the budgeting and approval process, access tools from anywhere, and track plans against actual performance.

- **Improve collaboration for greater accuracy and accountability.** Increase participation, precision, and buy-in with integrated communication tools and flexible security that help ensure input from the right people while maintaining the confidentiality of sensitive information.

- **Ease consolidation and rollups.** Simplify summaries and reporting while maintaining line-item visibility when you want it, even with multiple currencies. Identify account ranges and use drag-and-drop convenience to streamline roll-ups and multi-level analysis.

Forecaster for Microsoft Dynamics ERP

Gain control of budgeting processes to help save time and money, increase accountability, and make confident decisions.

With Forecaster and your Microsoft Dynamics® enterprise resource planning (ERP) solution, you can transform budgeting and financial planning from an exhausting, time-consuming chore to a competitive advantage. Streamline budget development, deliver more meaningful modeling and analysis, increase flexibility, and enhance alignment with business objectives to help support business growth and improve corporate performance.

The familiar user interface and built-in tools make it easy for everyone to participate in the budget development process.

Gain a fast return on investment

Increase planning efficiency and achieve more meaningful forecasts that enable better resource allocation and strategic decision-making. Forecaster empowers people from across your organization to create better budgets with less time and effort, delivering a quick return on your investment.

With a familiar user experience, similar to that of Microsoft Office Excel®, you can implement Forecaster quickly and with minimal training. Smooth connectivity with other Microsoft products and technologies—including Microsoft Dynamics solutions—takes advantage of your ERP information and maximizes your overall IT investment. With Forecaster, you can collaborate on accurate, flexible budgets that clearly align to strategic objectives, reveal cost-reduction opportunities, and enhance performance management for greater business success.

FEATURES

Tailored workflow management

- Customize approval routings and status definitions to create a transparent and readily controlled workflow to keep development and approval processes on track.
- Reduce process delays and streamline communication by designing reason codes that can be assigned to changes so other contributors understand them.
- Use e-mail notifications to alert participants to process milestones and approvals.
- View real-time status information about who has submitted and completed their budgets, as well as an audit trail to track budget revisions along the way.

Human resources budgeting

- Automatically calculate and allocate salary, benefits, and payroll taxes, and link the figures for individual employees to specific accounts.
- Budget for employees monthly or annually, on a salaried or hourly basis, while accounting for raises, promotions, grade changes, bonuses, and a variety of pay types, including overtime, shift differential, and billable or non-billable time.
- Streamline report generation about each component of employee compensation and benefits.
- Specify the order in which fields are displayed, protect them from editing, or hide them when they contain sensitive information.

Capital expenditure planning

- Calculate and allocate depreciation generated by planned purchases of fixed assets, using straight line, sum of years, or sum of months methods based on the life of the asset.
- Standardize the accounting of capital expenditures by cost center.
- Track cash outflow and the effects of projected purchases on the balance sheet.

Expense allocations and adjustments

- Allocate costs quickly and accurately and spread overhead among cost centers with an Allocation Wizard.
- Define specific distribution percentages or automate distribution based on factors such as headcount or square footage.

Modeling and scenarios

- Create custom formulas to calculate revenues, cost of sales, and profit margins based on a variety of rates, hours, prices, unit costs, or other factors.
- Calculate revenue and associated cost of goods sold (COGS) using basic assumptions or complex calculations.
- Use up to two additional dimensions, such as product and market, for more detailed planning.
- Prevent fiscal surprises when you can quickly create what-if scenarios or reforecast based on changes in market conditions, assumptions, strategies, organization, or formulas.

Business intelligence

- Increase accountability by giving managers rapid visibility into the effect of changes or actual performance compared to plans.
- Provide secure, Web-based access to key reports with flexible layouts, drill-down capabilities, and streamlined generation.
- Define spreadsheet templates that can enable your people to continue working with key forecast information in Excel.

Integration with Microsoft Dynamics ERP solutions

- Easily add budget or forecast details into existing FRx® reports to deliver accurate budget versus actual reporting.
- Utilize the ExpressLink Wizard to quickly and easily map up-to-date actuals from Microsoft Dynamics ERP solutions into Forecaster and use your actual as a baseline for accurate forecasts.

For more information about Forecaster, visit
www.microsoft.com/dynamics/en/us/products/forecaster.aspx.

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