

CEWS – Stump the Consultant

December 2017

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Question # 1

Security Manager

How to show the bottom line total for a user who does not have access to all departments?

Question # 2

Account Formulas

How to set up a Current Year's Net Income formula on Balance Sheet to calculate Retained Earning?

Question # 3

Version Control

What is the best practice for version control rather than creating new versions every year?

Question # 4

Version Backup

How do I keep my budget backed up without exporting it to excel every time the budget is finalized?

Question # 5

Email Notifications

Is there a way to be notified about a daily scheduled import process if it errors out without having to log into Prophix and looking at Task Log?

Question # 6

Template Design

How can a template be designed with years in Pages so they can be filtered to see the data for all the months in columns?

Question # 7

Template Formulas

How can I automate 3-year moving average on my templates?

Question # 8

Template Building

Are there list of tips for creating reports that contains hints and tricks?

Resources

- Prophix Help Center
<http://support.prophix.com/>
- **Prophix Community Forums**
<https://prophix.zendesk.com/hc/en-us/community/topics>
- Prophix Academy
<https://www.prophixacademy.com>
- Customer Empowerment Webinar Series
<http://info.prophix.com/CEWS-2017-Recordings>
- Link to Prophix Help directly from Prophix