CPM Advanced Training

VIVID REPORTS™
Business Intelligence

SedonaOffice®
The #1 Financial Software for Security Companies

Business Intelligence | CPM | Flex

Welcome

SedonaOffice®
The #1 Financial Software for Security Companies

- **Introductions**

- **CPM Advanced**
  - ✓ Budget Training
    - Budget Set Up (Main Menu)
    - Budget Account Mapping (Filter Builder)
    - Template Building (Row and Column Definition)
  - ✓ Automation to distribute templates

- **Q&A**

VIVID REPORTS™
Business Intelligence

CPM – Budget Features

- ✓ Budgets are created in Excel with **results stored on the server**
- ✓ Develop **multiple budget plans and scenarios**:
  - Traditional annual budget
  - Forecasts
  - Rolling budgets
  - Multi-year plans
  - "What if" scenarios

- ✓ **Capture** budget transactions (positions, projects, assets, events, etc.)

- ✓ **Document** your thoughts and assumptions with budget notes

- ✓ **Attach** documents (contracts, supporting schedules, etc.) to individual budget accounts

- ✓ **Audit** trail of budget changes is automatically maintained

- ✓ Budget by **any combination** of accounts

- ✓ **Quickly develop budgets and forecasts** using history or revising existing plans

- ✓ Easily distribute and **share budget templates** for input from your team

Thank You!

James Briscoe

President