

Getting Started with Financials and Marketing Planning

Agenda

Duration: 2 days

Times: 8:30 AM to 4:30 PM*

**Course duration may be adjusted based on the products licensed by attendees.*

Who Should Attend?

You should attend this course if you are a core project team member who is responsible for designing the use of Aprimo Financials and Marketing Planning products. You should also be a subject-matter expert in your company's marketing processes.

This training is intended for new customers or customers who are implementing new Aprimo 8.5 products.

What You Will Learn?

This course provides an interactive introduction to the following Aprimo 8.5 products:

- Budgets and Forecasts
- Expense Manager
- Marketing Planning

How Do You Register?

To register, visit aprimo.com to access the registration form. Your spot is reserved once Aprimo receives your registration. All registrations must be received two weeks prior to the scheduled course.

Participants will also have an opportunity to develop configuration and administration skills using Aprimo tools.

How Will You Spend Your Days?

Day 1

8:30 a.m. - 9:00 a.m.

9:00 a.m. - 12:00 p.m.

1:00 p.m. - 2:00 p.m.

2:00 p.m. - 3:00 p.m.

3:00 pm to 4:30 pm

Day 2

8:30 a.m. - 10:00 a.m.

10:00 a.m. - 12:00 p.m.

1:00 p.m. - 3:30 p.m.

3:30 p.m. - 4:30 p.m.

Budgets and Forecasts and Expense Manager

Introduction to Aprimo

Budgets & Forecasts: Setting up, activating, fiscal year plan

Managing a fiscal year plan and creating additional hierarchies

Expense Manager: Recognizing expenses, creating a forecast, locating and viewing expenses

Configuring in Aprimo Tools

Marketing Planner

Review

Marketing Planner: Using Markets, plans, and objectives

Marketing Planner: Constructing proposals

Marketing Planner: Reviewing proposals

Aprimo University reserves the right to cancel any class that does not meet the minimum enrollment size.