

The XLerant NewsPak

News from Client Services - May 2014

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Did You Know...

* You cannot **revoke signoff** on a base unit if the rollup unit is signed off. In the same way that the base units must be signed off and approved before the rollup units can be signed off and approved, the reverse is true when revoking signoff and approval. *

Our Perspective

Does Excel have any place in the budgeting process? We think it does.....

[Go to our Blog to read on](#)

Welcome Back!

Hello Joanne ,

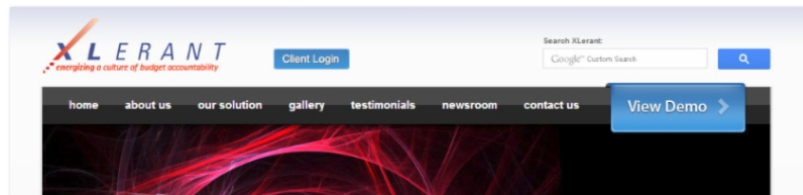
I hope you enjoy this edition of the XLerant NewsPak where you can find out about new features, learn a clever way to do something, and find out what's happening in the XLerant community.



Warm Regards,
-Joanne E. Brunn, VP Client Services

New Client Support Portal on xlerant.com

We are finishing construction of a new secure area on our website for you, our clients, to easily find information about BudgetPak.



You will be receiving an invitation shortly containing your unique login and password. We will continue to use Basecamp for file transfers during the implementation process. However, going forward, our documentation, release notes, training material, and myXL software updates will be released to this support area instead of Basecamp.

Please let us know what you think!

Support

- > Frequently Asked Questions (FAQs)
- > **Documentation**
- > Software and Release Notes
- > Self-paced Training Guides
- > Implementation Documents and Templates
- > Contact Us

You asked...We Delivered

New features now available

You asked. We delivered. The following new features are available in the cloud version and ready for use:

For the Administrator:

- Bulk start convenience feature for Budget and Forecasts
- New Account Type - Internal Calculation - used to aid in complex calculations
- Import Unit detail changes and Unit Event defaults in bulk via an Excel template
- Hidden Version tag - ability to hide versions from reporting and all user areas
- Reference Unit tag - exclude unit from the normal signoff process
- Update user login timestamps - When a user logs in, any locks older than one day are cleared from the budgets tab.

For the User:

- Status Icon is now shown by default on the Status screen

For more information on these new features, download the complete [Release notes](#).



Thank you Dan Brent from MSPP for a great webinar!

The Art of Forecasting Webinar

We had a **record number of attendees** sign up to learn how Dan Brent, CPA, Associate VP of Finance, at the Massachusetts School of Professional Psychology solved the forecasting problem in his organization and can now easily and flexibly revise budgets based on fresh results from the actuals. [View the webinar recording here.](#)



New Case Study!

Based on the webinar, you can also [read the Case Study](#) that documents MSPPP's journey from budgeting problems to BudgetPak solution.

Thanks Dan! ***We wouldn't be us without you!***

Talk about us - XLerant's Referral Program

XLerant has initiated a **Client Referral Program**. You can earn discounts on next year's subscription fee by referring another organization to XLerant ... and by them becoming a client.

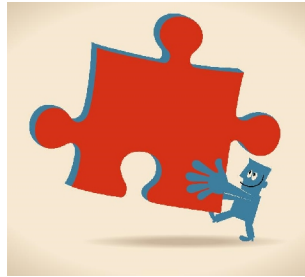


Please contact Bill Alderton, VP of Sales, at 203-883-4385 balderton@xlerant.com if you have any questions on the program, and to log a referral.

We look forward to hearing from you!

Thinking differently - Souper...

We know that you, our clients, think differently than the masses about the importance of ownership and participation in the budgeting process.



To help you **keep that edge**, here's a lateral thinking puzzle:

A woman was at an expensive and prestigious dinner. The first course was soup. Halfway through the course, she called over a waiter and whispered in his ear. He brought a drinking straw which she used to finish her soup. The other guests were surprised at her actions, but she still had a good explanation. What was it?

[Give up?](#)

Talk to us!

- Do you have a BudgetPak question?
- Is there a feature that you would love to see in an upcoming release?
- Do you need a training refresher or consulting help?
- Are you thinking about rolling out to more users?

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