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# The XLerant NewsPak

*News from Client Services - July 2011*

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## Welcome!

Greetings,

Welcome to the first edition of XLerant's newsletter – The XLerant News Pak!

We will be keeping you up to date with news about XLerant and BudgetPak, inviting you to events, alerting you to industry news, as well as asking for your input into product features and overall messaging.



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

## New Customers



BudgetPak was recently named the #1 pick for Budgeting Software by Accounting-Payroll Software.

[Read the Review](#)

### Did You Know...

1. You can mark all sections as reviewed with 1- click, from the Action menu.
2. You can have more than one account mapped to a section.

### Our Perspective

What's the **top priority of CFO's** today? According to the Hackett Group, it is "Improving the efficiency and effectiveness of the annual budgeting process.

A warm welcome to our new customers:

Tennessee Baptist Convention in Brentwood, Tennessee  
Saint Joseph's College of Maine in Standish, Maine  
Sholom Community Alliance in Saint Louis Park, Minnesota

### User Conference Webinar

**Save the date! Monday, July 11th.** Join us as we walk you through our new features from our May release and preview the features in our upcoming release. We will also be talking about the formation of XLERANT's Client Advisory Board and the upcoming On-Line Usage Survey. We hope you can attend!

### Client Advisory Board



Business is personal. We want to engage with a group of you on a regular basis to discuss product priorities, industry trends, and strategic direction. I will be providing more detail over the summer and inviting each of you to become a member on the Board.

### What's New?

Some of our **MAJOR** new features:

- **Monthly drivers** allow an administrator to designate a different rate for each month in the year to handle variable targets such



**Go to the blog** to download the study.

as shipping volume or student enrollment.

- **On Demand Templates** allow a budget holder to link the results of their excel model directly into the appropriate line items in their unit.

Some of our new **CONVENIENCE** features:

- Immediately **jump to any section** in the budget navigation screen via a new menu option - "Go to section."
- Select a unit through an **expandable/collapsible unit hierarchy tree** In Advanced Reporting.
- Ability to locate and **navigate directly** to a unit in the hierarchy in Configure Units.
- **Import and export drivers** and driver configuration in Import/Export Configuration.

## Coming Soon!

**XLIIntegrate** provides for dynamic integration within Excel to BudgetPak for pushing allocations, revenue, and other modeling data into BudgetPak, and pulling data out of BudgetPak for analysis, drill downs and pivot tables.

**Employee Classes** allows the administrator to set different benefit levels by Employee Class.

**Annual Monetary Driver** allows the administrator to designate an annual monetary driver, such as mileage rate or tuition, to be used throughout the year.



## Educational & Informative

Did you catch our latest webinar -

**15 Things You Can't Do with Excel for Budgeting?** As you already know, Excel guarantees calculations, but it doesn't guarantee managers will own their numbers or want to participate in the process. Listen to Larry Serven talk about why the budget is more about the people than about the model.



To find out more about **Self Service Budgeting** and what changes **Drew University** watch Drew University's presentation at the EACUBO (Eastern Association of College and University Business Officers) conference.

## 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?

Send an email to: [Services@xlerant.com](mailto:Services@xlerant.com)



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