

We 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.

Thank you,
The XLerant Customer Success Team



The XLerant NewsPak - June 2017

XLerant Recognized Second Year in a Row as the Only Budgeting Solution with Perfect Ease-of-Use Score in 2017 BPM Survey

Thank you to all of our clients who participated in this year's BPM Pulse Survey! Because of you we received:

- a perfect **5 out of 5 score in Ease-of-Use** (for the second year in a row)
- an **Overall Customer Satisfaction score of 4.91** (rising from 4.80 in 2016)
- a **4.73 score in the new category of Finance Self-Sufficiency** (ranking how easy it is for the finance team to maintain the software)

"Not only is Ease-of-Use a top priority for finance teams in the software selection process; it is also critical to the ultimate success of any BPM system," said Craig Schiff, President and CEO of BPM Partners.

"XLerant's solution is unique - and highly effective - at guiding users through the budgeting process, and you see that reflected in the top scores they have received year after year in Ease-of-Use and Customer Satisfaction."



Click [here](#) to read the Press Release

You asked...we delivered

Our next release of BudgetPak is coming at the end of July!

Here are some of the features and enhancements you can expect:

- **New Account Wizard** - the wizard will walk you through all the steps of adding a new account, so you don't have to remember them all!
- **Sign off all headcount sections in bulk** - on the Status page there will be an option to bulk sign off on all headcount sections, which will be available for users with super admin or 'change all budget' permissions.
- **Configurable P&L report** - rename the P&L reports and add additional formulas and subtotals to it, like EBITDA, Gross Operating Margin or COGS.
- **Reference accounts** - assign an expiration fiscal year to an account so that in budgets after that year, the account is no longer visible.

There will be Learning Series Webinars to review how to use each of the new features.

Did you know?

How can I add my own details about a budget/forecast?

Besides adding a note in the Notes section of Budget Navigation Map, you can add a brief comment or note on each of your versions in BudgetPak on the Versions page. This comment is specific to your versions only. It can be used to help you remember the approach you were taking when working in that version, such as 'Conservative Budget,' or 'Reduced Headcount Budget.'

Select a unit

Select the unit you would like to work with: 10-200: Marketing Select unit...

The last version you were working with was: 2017 Draft 2

You may select another version below, or: Resume editing Start ALL budgets/forecasts

Messages

Select a version

Here are the different versions you can view and work with for unit 'Marketing':

Version code	Version	Note	Your description	Status	Signed off	Date modified	Modified by	Your comments	Edit	View	Erase	Copy	History
FY2017-B-3	2017 Draft 1		2017 Draft 1	🟢		4/4/2017 5:55 PM	Smith	Conservative approach					
FY2017-B-5	2017 Draft 2		2017 Draft 2	🟡		6/26/2017 3:21 PM	Smith	With ActionPaks included					
FY2017-B-11	2017 Draft 3		2017 Draft 3	🔴		6/22/2017 3:24 PM	Smith	After cuts have been made					
FY2017-B-6	2017 Final Budget		2017 Final Budget	🟢	Sign off	6/26/2017 3:08 PM	Smith						

Save description

XLerant Learning Series Webinars

We will be covering new features as well as providing refreshers on current features.

Stay tuned for our next learning series webinar in August!

Click [here](#) to watch our latest learning series webinar on Budgeting for Strategic Initiatives. Here are the details that were discussed:

- Challenges of budgeting for strategic initiatives
- Examples of how ActionPaks can be used for strategic initiatives
- Live demo
- Different ways clients are using ActionPaks

If you would like to see recordings of prior webinars, please click [here](#).

For suggestions on what to cover in future webinars, please contact us at

Thinking Differently - Confectionery Manufacturer

A manufacturer of confectionery has a work force of thousands of workers. They never strike or demand better working conditions. They work up to 20 hours per day and receive no wages except food and shelter. Yet every year a completely new work force is brought in and none of the existing workers are re-employed. Why?

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?

Send an email to: Services@XLerant.com

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