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 - March 2018

2nd Annual Administrator Conference
Our planning is under way, and we are excited to announce the date and location of our next XLerant Administrator Conference

October 1-3,2018
Ann Arbor, Michigan
Sheraton Ann Arbor
Hotel

Registration details to come....

You asked...we delivered
This latest report enhancement is now available:

P&L reports now include ActionPak detail in a sub-report, similar to how line item detail is shown. This additional detail in reports can be seen:

- On the Reports page - when running the my budget summary and my budget versus reports
- On the Advanced Reporting page when running a P&L report grouped by default subtotals, when extended detail is selected.

Statement of Operations Annual Report

Company:	ABC Organization
Version:	2019 Final Budget
Unit:	10-200: Marketing
Budget holder:	User, XLerant (User)

Account	Description	2019 Final Budget			Budget
EXPENSE:					
8000	Meeting Expense	$269,075	(L)	(C)	Annual speaker series;
8100	Air Transportation	$99,888	(L)	(C)	Increase due to additional
8200	Rental car	$8,400	(D)		5% increase
8400	Lodging Expense	$77,715	(C)		SVP and VP - 3 days travel,
8500	Seminar Fees	$29,897	(C)		Breakout in line item details
8600	Training Fees	$23,850	(L)	(C)	Project Management Training
Travel		**$508,824**			
Total Direct Expenses		**$3,581,933**			
Gross Margin		**$7,591,254**			
Gross Margin %		**67.94 %**			
5000	Photography	$971,000	(C)		New logos increased cost due
5100	Printing Costs	$979,580	(C)		New vendor with reduced
5200	Advertising	$2,966,875			Trade journals, LinkedIn,
Photography/Printing/Advertising		**$4,917,455**			
2000	Rent	$93,450	(D)		
Rent & Occupancy		**$93,450**			
5400	Expensed Equipment Purchases	$1,600			
6000 >>	Allocated in Expenses	$4,250			
Total Miscellaneous Expenses		**$5,850**			
Total Indirect Expenses		**$5,018,555**			
EBITDA		**$2,572,699**			
9000	Existing Depreciation	$1,800			
9001	New Depreciation	$0			
9002	New Leases	$0			
Total Interest, Taxes, Depr/Amort		**$1,800**			
Net Income (Loss)		**$2,570,899**			

ActionPaks:

ActionPak:	Advisory Board Meeting
ActionPak code:	1000

Account	Description	2019 Final Budget	Notes for 2019 Final Budget
8100	Air Transportation	$1,500	Roundtrip for 3 staff members to Chicago
8400	Lodging Expense	$705	Lodging for 3 staff members for 2 nights.
8600	Training Fees	$3,500	Updates to keep current with industry standards.
	Advisory Board Meeting	$5,705	

ActionPak:	Update Website Design
ActionPak code:	2017-1

Account	Description	2019 Final Budget	Notes for 2019 Final Budget
4700	Professional Fees	$35,000	Design firm for new creative direction and layout
5000	Photography	$17,500	All photography and graphic work for new website
8000	Meeting Expense	$750	Multiple Onsites at Design firm
	Update Website Design	$53,250	

Did you know?

How can I set up the automatic password reset option?

On the BudgetPak Log In page, there is an option shown to 'Reset my password'. If the designated user name is listed in BudgetPak and has a valid email address associated with it, when this option is used the user will receive an email with a one-time link to reset their BudgetPak password. The link expires after 30 minutes. This will only work if email addresses have been set up and the automatic password reset feature has been turned on.

The first step to using this feature would be to set up email addresses for all BudgetPak users. This can be done by:

1. Going to the *Configure Users* page and entering them manually,
2. Or by going to the *Configuration Data* page and importing the 'User Changes' template (to update current users), or the 'Users' template (when adding new users).

Once email addresses are set up, the automated password reset feature can be enabled from the *Configure Specifics* page.

XLerant Learning Series Webinars
We will be covering new features as well as providing refreshers on current features.

Our latest webinar covered Custom P&L Layouts. To watch it, click here.

To watch recordings of some of the other webinars we have had in the past, please click here.

For suggestions on what to cover in future webinars, please contact us at Services@XLerant.com.

Thinking Differently - One Way Street

A girl who was just learning to drive went down a one-way street in the wrong direction, but didn't break the law. How come?

[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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