

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 Client Services Team



The XLerant NewsPak - August 2018

XLerant's Conference Is Almost Here!

There will be workshops for new and experienced administrators with highlighted best practices in various functional areas.

Registration is closing soon!

**Monday, October 1st - Wednesday, October 3rd
at the Sheraton Ann Arbor Hotel**

[Reserve your spot now!](#)

[Conference Agenda](#)

Registration includes all workshops, a meet and greet event Monday evening, breakfast, lunch and dinner (out in Ann Arbor) Tuesday, as well as breakfast and lunch on Wednesday.

You asked...we delivered...it's live

Our latest release of BudgetPak included these enhancements:

Dashboard - charts and graphs showing key performance indicators, progress to budget completion, headcount information, consolidations by unit or subtotal comparisons and key variances.



Account defaults - define a default percent change, and a default automated spreading method, for each account and optionally define different defaults for each unit.

Configure account defaults

Designate a default percent change and default spreading method for each discretionary account, and a 'target' percent change for non-discretionary accounts and subtotal. You can override the defaults for an account for specific units.

Account defaults set: ADS2019: Account Defaults 2019
 Company: ABC Organization

Configuration options: Discard Close Save

Compute trends Copy from another set

Account	Edit	Non-discretionary	Spreading method	Default change	Show exceptions	Unit exceptions	Add unit override
NET		X	As last year	1.00 %			
Class: Income		X	As last year	1.00 %			
Subtotal: Income		X	As last year	1.00 %			
40000: Membership Fees		X		1.00 %			
40100: Sales Revenue			As last year	2.00 %			
40200: Merchandise Revenue			As last year	1.00 %			
40300: Other Revenue		X		1.00 %			
40400: Event Revenue		X		1.00 %			
80200: Allocate in Revenue		X		1.00 %			
80300: Allocate Out Revenue		X		1.00 %			
Class: Expense		X	As last year	1.00 %			
Subtotal: Compensation & Benefits		X	As last year	1.00 %			
Subtotal: Professional Fees		X	As last year	1.00 %			
70500: Legal Fees			As last year	-3.00 %			
70600: Audit Fees			As last year	1.00 %			
70700: Consulting Fees			As last year	-4.30 %			
70800: Other Advisory Services			As last year	1.00 %			
70900: Recruiting Fees		X		1.00 %			
71000: Relocation		X		1.00 %			

New Versions Guide - the guide will walk you through all the steps of adding a new version, or changing an existing version.

Add version guide

Budget version for fiscal year 2019. Please read the instructions and follow the prompts through each of the steps to add a new version.

Reset

Version type and fiscal year
Basic settings
Fiscal periods
Forecast settings
Percent increase basic version
Spreading basic version
Prepopulated data version
FX set
Account defaults set
Employee set
Calculation defaults set
Drivers defaults set
Unit event defaults set
Admin file set
Final review

Basics settings

Please enter a code and description for your version. In addition, please check/uncheck any of the settings below.

The code is necessary to uniquely identify the version when importing data. For your convenience, we have supplied a unique version code based on the type of version you have selected. You are free to change this to something that is more meaningful to you, but it is recommended that it be kept short.

Version code:
FY2019-B-25

Version description:
2019 Budget Submission

Version settings (hover for detailed instructions):

- Read only
- Active
- Hidden
- Baseline
- Signoff
- Prepop source

Cancel
← PREVIOUS
Next →

And so much more...!

Click [here](#) for a detailed listing of the new enhancements. Full documentation will be available soon.

Thinking Differently - Lumberjacks

Tim and Jo are two lumberjacks who work at the same rate of speed. One morning, Tim works steadily from 8 o'clock to noon without taking a break. Jo starts and finishes at the same time, but takes a five-minute break every half-hour. At the end of the period Jo has felled considerably more trees than Tim. How come?

[Give Up?](#)

Wherever this Labor Day finds you -
*enjoying an end of summer celebration,
 anticipating the kick-off of fall football,
 or simply savoring a quiet moment and a good book...*



Best wishes for a safe, happy and relaxing holiday weekend from the team at XLerant!

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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www.xlerant.com



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