

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 - October 2018

XLerant's 2018 BudgetPak Conference was a hit!

Thank you to everyone who attended and helped make our administrator conference such a success!

[Employee Engagement, Collaborative Budgeting and Practical Forecasting are Top-of-Mind for CFOs and Finance Executives at XLerant User Conference](#)

Not only did we cover content areas such as:

- End user budget hacks
- Getting better control over your budget process:
Using automation and security
- New administrator helpful tips & techniques
- Intro to headcount & hourly salary planning
- Getting more out of BudgetPak: Did you know...?
- Setting up a new fiscal year: And cleaning up your database in the process



We also had a lot of great discussions during our special interest group sessions, as well as hands-on workshops covering our latest features, configurable P&L layouts, and myXL.

A special thank you to those who took their time to share their experience about XLerant and BudgetPak in video testimonials - **Cheryl Warner from Northwood University, Courtney Bonnell from A.T. Still University, Gail Keith from**

For any new administrators out there...

Check out this helpful guide to the most common tasks in BudgetPak.

Administrator Getting Started Guide is meant to serve as an outline of the steps required for the most common tasks an administrator completes in BudgetPak. It can be useful to new administrators who may have forgotten specific details of what they learned during administrator training.

Click [here](#) to download the guide from our support site.

Did you know?

How do I set up defaults by account?

Our latest release of BudgetPak included a **new feature - Account Defaults**. Default percent change and automatic spreading can now be defined for each account individually. Prior to the last release, defaults were applied across all accounts using the configuration page ATB & spreading defaults. That page has been renamed and is now ***Account defaults***.

Defaults are defined within an *Account default set*. Each version is assigned a set to use. Different sets of defaults can be assigned to different versions, making it possible to compare and contrast budgets with different sets of assumptions.

Use this tab to define the percent change defaults for each account, subtotal, and account class, and the automated spreading method default for each nondiscretionary account. The defaults will apply within each unit in the company to which the account is mapped. If for a specific account you need to designate different defaults for different units, click on "Add unit override" or use the "Account defaults overrides" tab.

The defaults are used in a number of places in BudgetPak, which are detailed in 4 How the defaults are used while budgeting.

Use this tab to define per-unit overrides for the account defaults, or to review and revise overrides previously defined on the "Defaults by account" tab.

Configure account defaults

Designate a default percent change and default spreading method for each discretionary account. Assign a "target" percent change for non-discretionary accounts and subtotals. You can override the default percent change for specific units.

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

Configuration options: Discard, Close, Save

Compare trends, Copy from another set

Defaults by account, Defaults by account overrides, Defaults by unit

Account	Edit	Non-discretionary	Spreading method	Default change	Show exceptions	Reset exceptions	Add unit override
MET		X	As last year	1.00 %			
Classic 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: Grant Revenue		X		1.00 %			
80200: Allocated in Revenue		X		1.00 %			
80300: Allocate Out Revenue		X		1.00 %			
Classic 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 %			
Subtotal: Travel		X	As last year	1.00 %			
72100: Meeting Expense			As last year	-10.00 %			
72200: Air Transportation			As last year	-10.00 %			
72300: Rental car			As last year	1.00 %			
72400: Auto Expense - Travel			By days per month	1.00 %			

Use this tab to define the default spreading method for each unit. This default is used only in one place: On the *Monthly spreading* section, when the user has selected the option "Spread all line items the same way".

For detailed instructions on how to setup account defaults, please refer to the [Account Defaults - usage and configuration](#) manual on our support site.

XLerant Learning Series Webinars

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

Our next webinar is scheduled for Thursday, December 6th

Topic: Highlights from the Latest Release

To register, 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 - The Fall

A woman fell 40 feet without a parachute. She turned upside-down seven times and came to land safely on solid ground. 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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