The XLerant NewsPak

News from Client Services - February 2014

Our Thanks

A great big **Thank You** to our clients helping us spread the word on Capterra - *"find the right software for your organization"* - that BudgetPak is the best!

Read the reviews

Welcome Back!

Hello Joanne ,

I 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.

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

You asked...We Delivered

New features now available
You asked. We deliver. The following new features are available in the cloud version and ready for use:

For the Administrator:
- Define and configure an 8-part calculation
- Import calculation constants in bulk via a template
- Define custom names for raise/bonus events
- Copy a budget or forecast version (for all units) in bulk
- Import final set of employees from previous fiscal year to start the new fiscal year
- Create instructions or notes to display on home page

For the User:
- View a budget currently open in edit mode by another user
- Import Line Item Detail from a previous version
- Import ActionPaks from a previous version
- Import Assets from a previous version

For more information on these new features, download the complete [Release notes](#).

Infographics and E-books, oh my!

XLerant promotes ideas to improve financial performance and the corporate budgeting process:

1. Survey of Financial Professionals
The results of this survey, presented as an infographic, are designed to help organizations think more broadly about ways to improve their financial performance and how to make the budgeting and planning process better and more strategic.
[Click here for your copy of the infographic.](#)

2. The Ten Commandments of Budgeting
This e-book contains key considerations for improving the corporate budgeting process while engaging stakeholders along the way.
[Get your copy of the e-book](#)

Talk about us - XLerant's Referral Program

XLerant has initiated a **Client Referral Program**. You can earn discounts on next year's subscription fee by referring another organization to XLerant ... and by them becoming a client.

Please contact Bill Alderton, Director of Sales, at 203-883-4385 balderton@xlerant.com if you
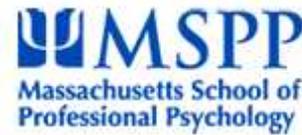
have any questions on the program, and to log a referral.

We look forward to hearing from you!

Upcoming Webinar featuring Dan Brent from MSPP!

The Art of Forecasting...A Pragmatic Case Study

Register for this webinar to learn how Dan Brent, CPA, Associate VP of Finance, Massachusetts School of Professional Psychology solved the forecasting problem in his organization and can now easily and flexibly revise budgets based on fresh results from the actuals. This webinar will be invaluable to any organization in any industry that wishes to improve the planning process.

Thanks Dan! *We wouldn't be us without you!*

Thinking differently - The Border Police...

We know that you, our clients, think differently than the masses about the importance of ownership and participation in the budgeting process.

To help you **keep that edge**, here's a lateral thinking puzzle:

Hans and Fritz are German spies during World War II. They try to enter America, posing as returning tourists. Hans is immediately arrested.

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?

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Services@XLerant.com

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