

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

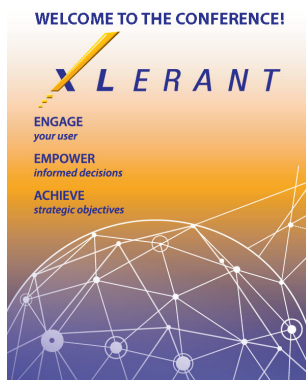


## The XLERANT NewsPak - April 2017

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### XLERANT's 2017 BudgetPak Conference was a hit!

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



Not only did we cover content areas such as:

- Zero based budgeting vs. baseline budgeting
- Headcount & salary planning: Uses, options & recommendations
- Calculated accounts & drivers: Creating consistency with automation
- The myXL add-in: Functions and formulas
- Setting up a new fiscal year: And cleaning up your database in the process

We also had open discussions about practical usages of Headcount Planning, Action Paks, Rolling out BudgetPak, and Ongoing Usage.

A special thank you to **Raymond Garcia and Renee Jett from Western University of Health Sciences**, and **Anne Wells from the University of Findlay** for sharing their stories about ActionPaks, and **Matt Natole from Recovery Resources** for sharing his story about Headcount Planning.

And let's not forget the efficient group of 5 who quickly put together a Royal Flush for the **poker challenge!**

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### You asked...we delivered

*Our next release of BudgetPak will include these new features:*

- **Net unsaved changes total** - on the monthly spreading and across the board pages you will be able to see the amount of unsaved changes, to help with re-balancing (moving amounts from one line item to another, while leaving the unit total the same).
- **Reference accounts** - the ability to assign an expiration fiscal year to an account so that in budgets after that year, the account is no longer visible.
- **New headcount configuration option related to sign off** - allowing sign off of a unit even if headcount sections are not reviewed (for when budget holders do not have permission to see headcount).
- **Configurable P&L report** - the ability to rename the P&L reports, i.e. Statement of Activities report, as well as add additional formulas and subtotals to it like EBITDA.

## Did you know?

*How do I use one Excel template to import multiple configuration items in bulk?*

You can use the same Excel template to import multiple configuration items on the Configuration Data page, by combining the required headers from different import templates. For example, to import almost all the configuration items related to adding accounts in bulk, you can use this [all inclusive template](#).

ReportSectionType	AccountClass	AccountNumber	AccountDescription	SectionDescription	SubtotalDescription	Enterp
Income	Income	10001	Membership Fees	Membership Fees	Income	✓
Income	Income	10002	Sales Revenue	Sales Revenue	Income	✓
Income	Income	10003	Merchandise Revenue	Merchandise Revenue	Income	✓
Income	Income	10004	Consulting Revenue	Consulting Revenue	Income	✓
Expense	Expense	1000	Salaries - Exec	Compensation Review	Compensation & Benefits	✓
Expense	Expense	1001	Salaries - Non Exec PT	Compensation Review	Compensation & Benefits	✓
Expense	Expense	1002	Salaries - Non Exec FT	Compensation Review	Compensation & Benefits	✓
Expense	Expense	1003	New Account	Compensation Review	Compensation & Benefits	✓

Once complete, this template will allow you to import:

1. Stacks
2. Sections
3. Subtotal definitions
4. Company accounts
5. Account/section mapping
6. Account/subtotal mapping

BudgetPak will automatically exclude any columns that are not required for a specific import.

## XLerant Learning Series Webinars

*We have recordings of all our prior webinars highlighting various features of BudgetPak.*

Stay tuned for our next learning series webinar!

Topics we have previously covered include:

- Drill through to GL transaction detail
- Budgeting benefits by employee
- Moving to a new fiscal year
- Forecasting process - best practices
- Notes, files and categories

Please click [here](#) to see all of our recent webinars as well as other how-to videos.

For any suggestions on what to cover in future webinars, please contact us at [Services@XLerant.com](mailto:Services@XLerant.com).

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## Thinking Differently - Lockout

Jefferson Jones was an art collector with a valuable collection in his apartment. It had one door, and he fitted it with 6 locks. While he was away, a determined burglar who was skilled at picking locks tried to open the door, but although he could pick all the locks he could not get in. Why not?

### Give Up?

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## 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](mailto:Services@XLerant.com)

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