

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 - May 2017

You asked...we delivered

Our next release of BudgetPak will include these new features:

- **New Account Wizard** - the wizard will walk you through all the steps of adding a new account, so you don't have to remember them all!
 - **Sign off all headcount sections in bulk** - on the Status page there will be an option to bulk sign off on all headcount sections, which will be available for users with super admin or 'change all budget' permissions.
 - **Configurable P&L report** - rename the P&L reports and add additional formulas and subtotals to it, like EBITDA, Gross Operating Margin or COGS.
 - **Net unsaved changes running 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** - assign an expiration fiscal year to an account so that in budgets after that year, the account is no longer visible.
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Did you know?

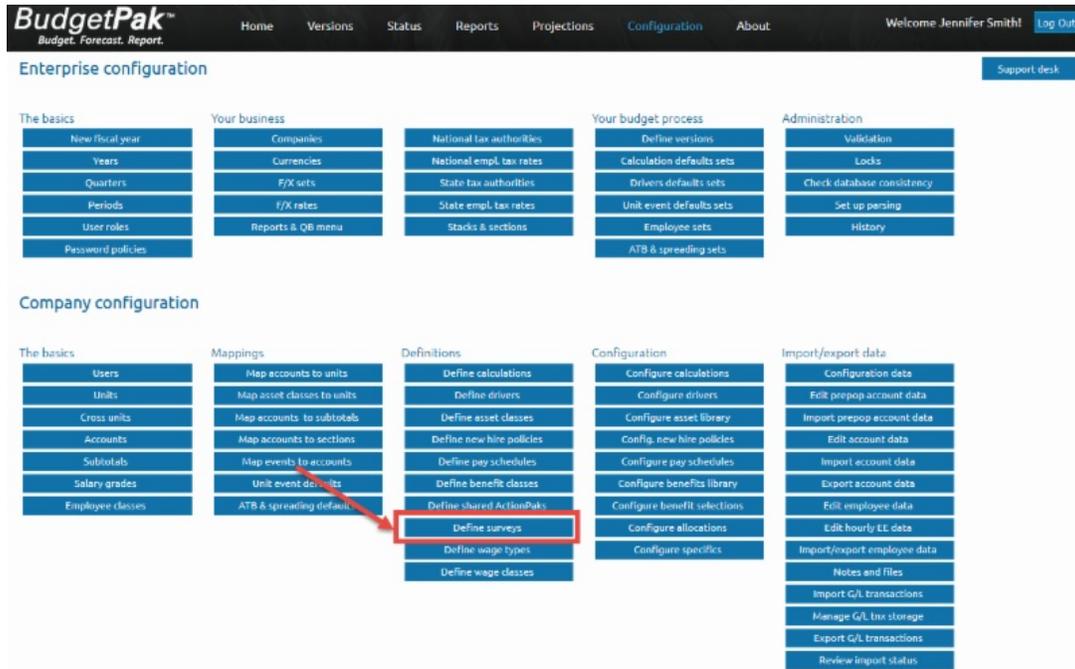
How do I create a survey so that my end users can provide feedback on budget and finance processes?

You can create a survey in BudgetPak, which will allow you to easily gather information from your BudgetPak users. You decide whether the user is prompted to take the survey right after logging in, or only after signing off on a budget. The survey can be prepared in advance, and have a scheduled "go live" date.

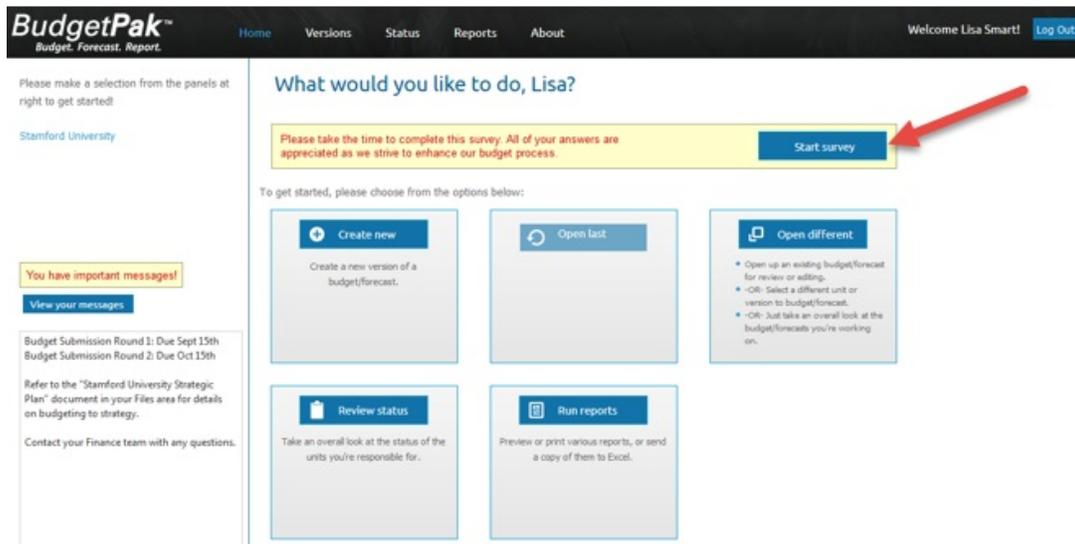
Types of survey questions include:

- Yes or no
- Multiple choice
- Numerical response
- Text response

To create a survey, go to 'Define surveys' on the Configuration menu:



Once the survey has gone live, your users will see a prompt on the BudgetPak home page:



Survey responses can be exported to an Excel file for review. For more information on setting up a survey, click [here](#) to see the release notes.

For your Budget Managers

For new budget managers, or as a refresher for any budget manager, here is a link to a standard end user training session.

The training includes:

- Starting a budget

- Budget Navigation Map
- Budgeting for an account using different budget methods
- Headcount and Salary Planning
- Across the board and monthly spreading
- ActionPaks
- Reporting
- Sign off and approval

[BudgetPak Standard End User Training](#)

XLerant Learning Series Webinars

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

Stay tuned for our next learning series webinar on Budgeting for Strategic Initiatives!

Here are the details we will be discussing:

- Challenges of budgeting for strategic initiatives
- Examples of how ActionPaks can be used for strategic initiatives
- Live demo
- Client use cases and outcomes

If you would like to see recordings of prior webinars, please click [here](#).

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

Thinking Differently - The Unlucky Trip

A man hurried down an unlit road with a torch in his hand. He tripped and dropped the torch, which went out. No damage was done, and no one was hurt, but the incident was reported in newspapers around the world. Why?

[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

