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 - September 2017

You asked…we delivered

Our latest release of BudgetPak included the following enhancements:

- **Configurable P&L report** - rename the P&L reports and add additional formulas and subtotals to it, such as Net Tuition, EBITDA, or Gross Operating Margin.
- **New Account Guide** - walks you through all the steps for creating a new account.
- **Sign off all headcount sections in bulk** - on the Status page there is now an option to bulk sign off on all headcount sections, which is available for users with super admin or 'change all budget' permissions.
- **Reference Accounts** - assign a expiration year on an account so it no longer appears in budgets after that year.

For more details on all the new features and enhancements included in the latest release, here are the release notes.

Did you know?
Can I edit an account so it no longer appears in budget versions?

The latest release of BudgetPak introduced a new option that allows you to assign a fiscal year expiration to an account. This allows historical information to stay intact, while no longer showing the account in current and future year versions.

There are two areas where you can update an account to have a final fiscal year:

1. On the Accounts page of the Configuration menu, you can edit an account, and then enter a 'Final Fiscal Year'. This is best if you are only editing a few accounts.

2. On the Configuration Data page of the Configuration menu, you can export 'Company Account Changes' and update the column for 'Final Fiscal Year'. Then import the template back into the Configuration Data page. This is best for when you have to edit a lot of accounts at once.

XLerant Learning Series Webinars
We will be covering new features as well as providing refreshers on current features.

Our next learning series webinar will be on the new feature - Add Account Guide.
Stay tuned for more details.

Click here to watch recordings of some of the webinars we have had in the past.

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

Thought Leadership Series

We have a series of e-books and whitepapers dedicated to the mission of engaging employees, empowering financial managers and department heads to make more informed decisions so that the strategic objectives of the organization can be met.

Decision Point Budgeting Brief

Are any of your peers trying to determine the right time to invest in a dedicated budgeting

Are any of your peers trying to determine the right time to invest in a dedicated budgeting solution?

If so, please share with them our latest budgeting brief to learn more about the top reasons and real-world examples detailing:

- Why finance teams have made the switch to purpose-built budgeting software
- How they justified the investment
- What they looked for during their selection process
- And the outcomes they have achieved

Thank you to everyone who shared their stories with us for our case studies, which we used in this brief. We wouldn't be us without you!

Thinking Differently - The Hasty Robber

A man robbed a bank. If he had seen the other gun he would not have been in such a hurry. Why not?

[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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