

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 - November 2017

You asked...we delivered

Our next release of BudgetPak will include these enhancements:

- API for importing/exporting account data and selected configuration data
 - Improved user experience for sorting accounts and subtotals
 - Email notifications for various events (budget signed off, sign-off revoked, etc.)
 - Automated password reset
 - Compare up to four versions on an annual P&L variance report
 - Suppress accounts with all zeroes from reports
 - New monthly spreading option based on workdays
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Thought Leadership Series - Webinar

We have a series of whitepapers and webinars 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.

[Strategy Execution with a Balanced Scorecard](#)

Successful organizations understand the bottom-line financial value of a sound strategic plan. But taking the strategy from paper to execution is often as much art as science. A balanced scorecard can provide management with an effective tool to not only create a strategy but to articulate their vision and execute a plan to achieve that vision.

[Join us for this complimentary webinar](#) on December 7th presented by guest speaker Jennifer Eversole, CPA. Jennifer, an industry expert in finance and organizational strategy, will provide strategies for creating a Balanced Scorecard methodology in your organization - whether you are evaluating the effectiveness of your current Balanced Scorecard or building it for the first time.

Topics include:

- * Developing the right measures - including leading & lagging indicators
- * Identifying & integrating customer, internal & financial perspectives
- * Putting it all together in the Strategy Map
- * Leveraging your budgeting process with the balanced scorecard approach
- * Engaging employees in the process

Did you know?

How do I update salary increases, bonuses and other compensation after the budget has been started?

To update the salary increases, bonus or other compensation defaults for all employees at once, you can use the option on the Unit Event Defaults configuration page to 'push defaults to existing budgets':

The screenshot shows the BudgetPak Enterprise configuration interface. The 'Company configuration' section is expanded, and the 'Unit event defaults' option is highlighted with a red box. The interface includes a navigation bar with options like Home, Versions, Status, Reports, Projections, Configuration, and About. The main content area is divided into 'Enterprise configuration' and 'Company configuration' sections, each with various sub-sections and options.

The screenshot shows the 'Unit event defaults' configuration page. The page title is 'Unit event defaults' and it includes a 'Save' button. Below the title, there are instructions: 'For each unit, designate the defaults for each employee-based event (raise, bonus, etc)'. The page has a dropdown menu for 'Unit event defaults set' (currently 'USD0017: Unit event defaults for'), a 'Select company' dropdown (currently 'ABC Organization'), and an 'Event type' dropdown (currently 'All event types'). A red arrow points to the 'Push defaults to existing budgets' button. Below the form is a table with columns: 'EOL', 'Unit code', 'Unit', 'Section', 'Event type (Budgetpak internal description)', 'Employee class', 'Currency', and 'Event method'.

EOL	Unit code	Unit	Section	Event type (Budgetpak internal description)	Employee class	Currency	Event method
	ABC Organization	ABC Organization	Salary increases	Raise		USD	percent
	ABC Organization	ABC Organization	Bonus	Bonus		USD	paid
	ABC Organization	ABC Organization	Other Compensation	Other Compensation		USD	amount

Once you select that option, you will be asked to pick which version you would like to update. You will also be able to choose whether to:

1. Update the default values only - which will not actually change the budget or any selections budget holders have already made.
2. Update employee with defaults - which will only update employees who have been given the default increase/bonus. This will not update employees who have been given another increase different from the default.
3. Update all - which will update every employee to with the new default increase/bonus.

Note that: 'Pushing out the defaults' does push out all defaults, so if you are using Bonus/other compensation sections as well as salary increase, this will push the defaults out for all of these events.

XLerant Learning Series Webinars

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

Our next learning series webinar is on Thursday, November 30th at 2pm and will cover the new feature - Add Account Guide. Click [here](#) to register.

To watch recordings of some of the 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 Sulking Boy

A woman tells her children to do something, but just one boy obeys. The woman says something to him, and he stomps away, sits down, and sulks.

[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

