

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 - March 2018

2nd Annual Administrator Conference

Our planning is under way, and we are excited to announce the date and location of our next XLerant Administrator Conference



October 1-3, 2018
Ann Arbor, Michigan
Sheraton Ann Arbor
Hotel



Registration details to come....

You asked...we delivered

This latest report enhancement is now available:

P&L reports now include ActionPak detail in a sub-report, similar to how line item detail is shown. This additional detail in reports can be seen:

- On the Reports page - when running the my budget summary and my budget versus reports
- On the Advanced Reporting page when running a P&L report grouped by default subtotals, when extended detail is selected.

Statement of Operations Annual Report

Company: ABC Organization
 Version: 2019 Final Budget
 Unit: 10-200: Marketing
 Budget holder: User, X Lerant (User)

Account	Description	2019 Final Budget	Budget
EXPENSE:			
8000	Meeting Expense	\$289,075	(L) (C) Annual speaker series;
8100	Air Transportation	\$99,888	(L) (C) Increase due to additional
8200	Rental car	\$8,400	(D) 5% increase
8400	Lodging Expense	\$77,715	(C) SVP and VP - 3 days travel,
8500	Seminar Fees	\$29,897	(C) Breakout in line item details
8600	Training Fees	\$23,850	(L) (C) Project Management Training
Travel		\$508,824	
Total Direct Expenses		\$3,581,933	
Gross Margin		\$7,591,254	
Gross Margin %		67.94 %	
5000	Photography	\$971,000	(C) New logos increased oost due
5100	Printing Costs	\$979,580	(C) New vendor with reduced
5200	Advertising	\$2,988,875	Trade journals, LinkedIn,
Photography/Printing/Advertising		\$4,917,455	
2000	Rent	\$93,450	(D)
Rent & Occupancy		\$93,450	
5400	Expensed Equipment Purchases	\$1,800	
8000 >>	Allocated in Expenses	\$4,250	
Total Miscellaneous Expenses		\$5,850	
Total Indirect Expenses		\$5,018,555	
EBITDA		\$2,572,699	
9000	Existing Depreciation	\$1,800	
9001	New Depreciation	\$0	
9002	New Leases	\$0	
Total Interest, Taxes, Depr/Amort		\$1,800	
Net Income (Loss)		\$2,570,899	

ActionPaks:

ActionPak: Advisory Board Meeting
 ActionPak code: 1000

Account	Description	2019 Final Budget	Notes for 2019 Final Budget
8100	Air Transportation	\$1,500	Roundtrip for 3 staff members to Chicago
8400	Lodging Expense	\$705	Lodging for 3 staff members for 2 nights.
8600	Training Fees	\$3,500	Updates to keep current with industry standards.
Advisory Board Meeting		\$5,705	

ActionPak: Update Website Design
 ActionPak code: 2017-1

Account	Description	2019 Final Budget	Notes for 2019 Final Budget
4700	Professional Fees	\$35,000	Design firm for new creative direction and layout
5000	Photography	\$17,500	All photography and graphic work for new website
8000	Meeting Expense	\$750	Multiple Onsites at Design firm
Update Website Design		\$53,250	

Did you know?

How can I set up the automatic password reset option?

On the BudgetPak Log In page, there is an option shown to 'Reset my password'. If the designated user name is listed in BudgetPak and has a valid email address associated with it, when this option is used the user will receive an email with a one-time link to reset their BudgetPak password. The link expires after 30 minutes. This will only work if email addresses have been set up and the automatic password reset feature has been turned on.



Log In

[Browser settings tips](#)

[Reset my password](#)

The first step to using this feature would be to set up email addresses for all BudgetPak users. This can be done by:

1. Going to the *Configure Users* page and entering them manually,
2. Or by going to the *Configuration Data* page and importing the 'User Changes' template (to update current users), or the 'Users' template (when adding new users).

Configure users

In this section, you may define the specific users of the system and assign them to specific roles.

Company:

Show login history

Disabled	First name	Last name	Role	BudgetPak login	Email	BudgetPak password	Do not require password change after 1st use	Create/Change BudgetPak password
<input type="checkbox"/>	Bill	Alderton	SuperAdmin	Bill	bill@stanfordu.edu	*****	<input checked="" type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Henry	Biggs	UnitMgr	Biggs	hbiggs@stanfordu.edu	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Mike	Brown	SuperAdmin	Brown	mbrown@stanfordu.edu	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Steve	Brubaker	UnitMgr	Brubaker	stevbruk@stanfordu.edu	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Fred	Burns	UnitMgr	Burns	fburns@stanfordu.edu	*****	<input checked="" type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Barbara	Dean	UnitMgr	Dean	bdean@stanfordu.edu	*****	<input checked="" type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Susan	Gallant	UnitMgr	Gallant	sgallant@stanfordu.edu	*****	<input checked="" type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Clive	Hastings	UnitMgr	Hastings	chastings@stanfordu.edu	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Burt	Hendersen	UnitMgr	Hendersen	bhenders@stanfordu.edu	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Jon	Jones	UnitMgr	Jones	jones27@stanfordu.edu	*****	<input checked="" type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Martin	Long	UnitMgr	Long	mlong@stanfordu.edu	*****	<input checked="" type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Steve	Lott	UnitMgr	Lott	slott@stanfordu.edu	*****	<input checked="" type="checkbox"/>	Change password Delete
<input checked="" type="checkbox"/>	Linda	Murphy	UnitMgr	Murphy	lmurphy@stanfordu.edu	*****	<input type="checkbox"/>	Change password Delete
<input type="checkbox"/>	Tony	Perkins	UnitMgr	Perkins	tperkins@stanfordu.edu	*****	<input type="checkbox"/>	Change password Delete
<input checked="" type="checkbox"/>	Mark	Rich	UnitMgr	Rich	mrich@stanfordu.edu	*****	<input type="checkbox"/>	Change password Delete

Once email addresses are set up, the automated password reset feature can be enabled from the *Configure Specifics* page.

Configure budgeting specifics

Company:

Est. budget impact | Leave policy | Employee Options | Expense treatment | Review Headcount notes | Fiscal year lockout | **Other** | Transaction detail

Start new budgets from defaults? When checked, BudgetPak will set the default option when starting a budget to be 'use the defaults to start.' When unchecked, BudgetPak will set the default option when starting a budget to be 'start my budget from scratch.'

Designate the custom logout redirect (if any):

Allow automated password resets? When checked, users with an email address configured in BudgetPak may reset their own passwords.

Newly-created units default to having headcount? When checked, BudgetPak will set the default option when creating a unit to be 'This unit allows headcount.' When unchecked, BudgetPak will flag newly-created units as not allowing headcount by default.

Newly-created units default to having assets? When checked, BudgetPak will set the default option when creating a unit to be 'This unit allows assets.' When unchecked, BudgetPak will flag newly-created units as not allowing assets by default.

The system is configured to support G/L transaction detail. You may store up to 1 GB of transactions.

XLerant Learning Series Webinars

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

Our latest webinar covered Custom P&L Layouts. To watch it, click [here](#).

To watch recordings of some of the other 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 - One Way Street

A girl who was just learning to drive went down a one-way street in the wrong direction, but didn't break the law. How come?

[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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