



The XLERANT NewsPak - May 2020

XLERANT Learning Series Webinars

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

Our next webinar is scheduled for Thursday, June 11th

Topic: Forecasting Part 1 of 2 - Standard Forecasts

[Register now!](#)

Part 2 of this webinar series will be on Thursday, July 9th

Topic: Forecasting Part 2 of 2 - Detailed Forecasts

[Register now!](#)

To watch recordings of 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.

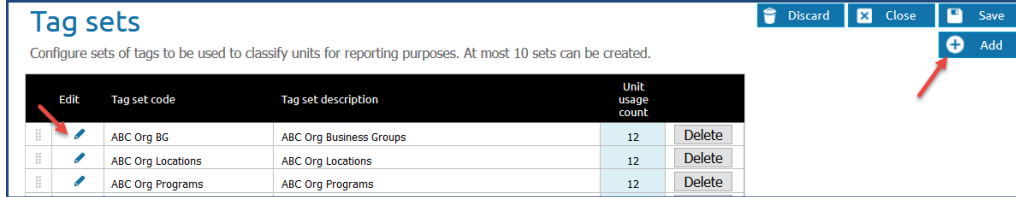
Did you know?

Did you know you could use Tags for filtering and reporting across the unit hierarchy?

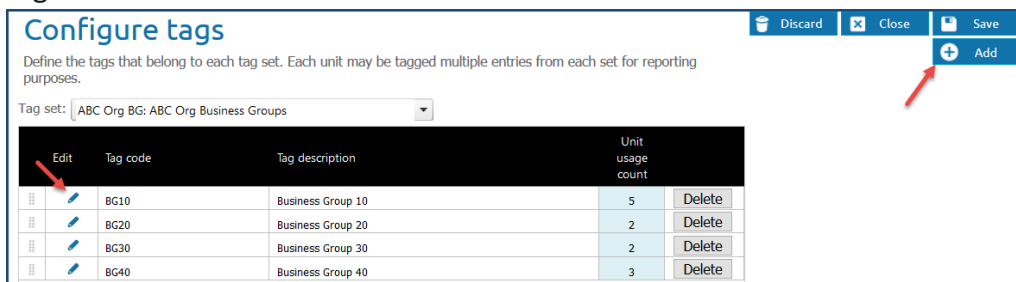
Each unit can be tagged with different identifiers to allow filtering and reporting across the unit hierarchy. You can define multiple sets of tags, and assign tags from each set to a unit, so each unit can be classified in different ways.

Here are the steps for setting up tags in BudgetPak:

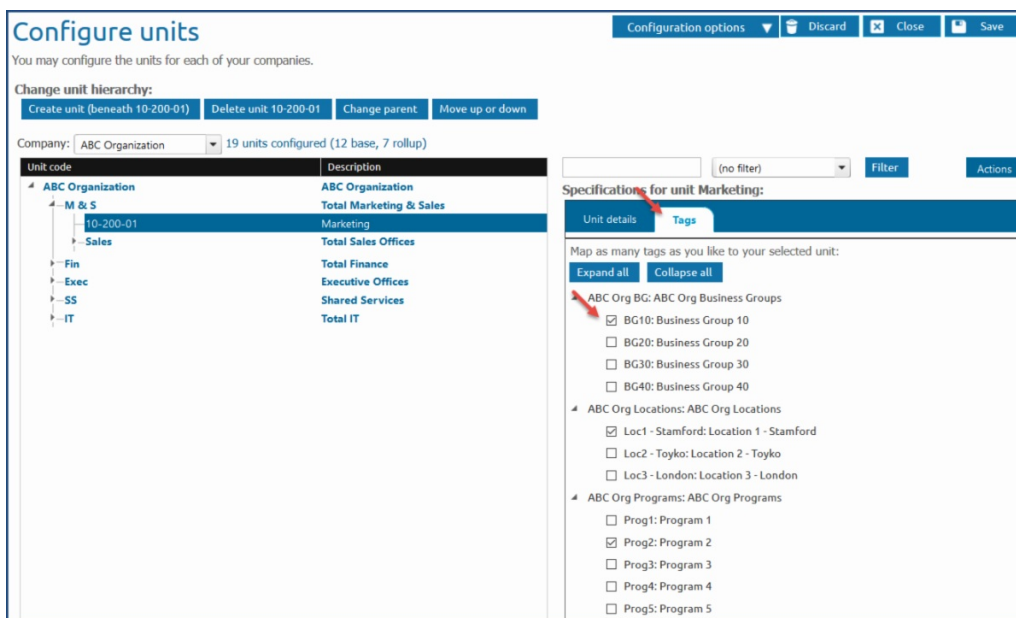
1. **Setup Tag Set(s)** - Go to the **Tag Sets** configuration page. Tags are grouped together into tag sets. This is where you add, edit, delete the tag sets as needed. Up to 10 tag sets can be created.



2. **Configure Tags** - Go to the **Tags** configuration page. Select a tag set from the drop down menu, then add, edit, delete the tags that belong to it as needed. There is no limit to the number of tags that may be designated for a tag set.



3. **Assign tags to units** - Go to the **Units** configuration page. Tags can be assigned individually here. Use the Tags tab to designate which tags are assigned to each unit. Tags may be assigned to rollout units as well as base units.



Alternatively, tag sets, tags and unit/tag mapping can all be imported via the **Import/export configuration** data page.

To watch a short admin training video on setting up tags, go [here](#).

Client Case Studies

Thank you to our wonderful clients!

Thank you to Sheree Brugmann, Director of Finance and Accounting at Wheaton Bible Church and Amy Sim, General Accounting Manager at CenCal Health for participating in our case studies.

Click to read their stories about why and how they choose BudgetPak, and how

our solution has worked for them.



[Wheaton Bible Church Case Study](#)



[CenCal Health Case Study](#)

To read additional client case studies, [please click here](#).

Thinking Differently - Rare Event



What happened in the second half of the 20th century and will not happen again for over 4,000 years?

[Give up?](#)

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