



## The Xlerant NewsPak - June 2020

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### The 2020 BPM Survey Results are in...

*And once again, the top scores go to our amazing clients!*

Published by [BPM Partners](#), the BPM Pulse Survey provides an unbiased and up to date overview of the world of business performance management. The survey results come directly from each vendor's 'users' or customer base.

**And thanks to our amazing clients like you, Xlerant received a perfect 5.0 score for Ease-of-Use.** This is the fifth consecutive year that BudgetPak was top-ranked in the BPM Pulse Survey with the only perfect score for Ease-of-Use!

Xlerant was also top-rated with outstanding scores in Budgeting/Planning Functionality, Overall Satisfaction, Finance Self-Sufficiency, Innovation, Price/Value, as well as excellence in Reporting Functionality and Performance/Scalability.

Craig Schiff, CEO of BPM Partners, shared a few words about our ratings:

*"Xlerant's intense focus on ease-of-use and best-of-breed budgeting/forecasting capabilities is evident in their consistently outstanding scores year-over-year - particularly in customer satisfaction and finance self-sufficiency. This is especially important for finance teams considering a BPM investment, because ease-of-use is directly related to post-purchase satisfaction. Among the executives we surveyed this year, the highest dissatisfaction rates were reported with systems that are labor-intensive, not easy to self-administer, or the process takes too long."*



The BPM Pulse also assesses new and evolving industry trends and customer priorities for BPM software solutions. Among the 336 finance executives surveyed across North America and Europe in 2020, Ease-of-Use and Financial Self-Sufficiency were ranked among the most important attributes when selecting a BPM solution - with best-in-breed budgeting and forecasting software the most sought BPM solution overall. In addition, the current economic climate is driving a focus on strategic planning, more frequent forecasting, and scenario modeling.

*Our success depends on the success of our clients. Together, the entire team at Xlerant, has been truly honored to work with all of you during these tumultuous times. Thank you for choosing BudgetPak - and a special thank you to all of our customers who participated in this year's survey.*

## 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, 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](mailto:Services@XLerant.com).

## Did you know?

*Did you know any unit can now be designated as a reference unit*

A reference unit is a unit that no longer needs to be included in the budget process, although it still has historical data and therefore cannot be deleted. A reference unit cannot be edited, and is excluded from the signoff/approval process, but is still incorporated into reports and roll-ups. A rollup unit may be designated as a reference unit as long as all of its child units are also reference units.

Previously, BudgetPak imposed a restriction that only units with no headcount and no assets in any fiscal year could be designated as reference units. ***This restriction has been lifted, so now any unit can be designated as a reference unit.***

Reference units are designated on the Units configuration page by selecting "Make this a reference unit":

The screenshot displays the BudgetPak 'Configure units' page. At the top, there is a navigation bar with links for Home, Dashboard, Versions, Status, Reports, Projections, Configuration, and About. The main header includes the BudgetPak logo and the text 'Budget. Forecast. Report.'. Below the header, there are buttons for 'Configuration options', 'Discard', 'Close', and 'Save', along with a notification 'You have unsaved changes!'. The main content area is titled 'Configure units' and contains a section for 'Change unit hierarchy' with buttons for 'Create unit (beneath 20-200-02)', 'Delete unit 20-200-02', 'Change parent', and 'Move up or down'. A table shows the unit hierarchy for 'ABC Organization' with 19 units configured. The 'Admin Services' unit is highlighted, and a red arrow points to its specifications panel on the right. This panel includes fields for 'Unit code', 'Description', 'Culture and currency', and 'Budgetholder'. At the bottom of the specifications panel, there are checkboxes for 'Allow headcount for this unit', 'Allow assets for this unit', and 'Make this a reference unit', with the latter being checked and highlighted by a red box.

# Thinking Differently - T-shirts



A change in the law in Italy resulted in large sales of white t-shirts with black bands on them. How come?

[Give up?](#)

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