



## The Xlerant NewsPak - July 2020

### Xlerant's 3rd Annual BudgetPak Conference

**Updated Dates:**  
**Monday, October 18th - Wednesday, October 20th, 2021**  
**at the Stamford Marriott**

*More information to come around April 2021*



### Did you know?

*Did you know you can upload files into your Budget?*

There are two types of files that can be included in BudgetPak:

**1. Admin files** are organization-wide files that all users can access and download from within their own budgets.

- Admin files can be uploaded by a BudgetPak Administrator via the Configuration menu.

The screenshot shows the 'Configuration' menu with several categories. Under 'GENERAL ADMINISTRATION', the 'Administration' sub-menu is expanded, and 'Files' is highlighted with a red arrow. Other categories include DIMENSIONS, HEADCOUNT, PARAMETERS, and IMPORT/EXPORT.

GENERAL ADMINISTRATION	DIMENSIONS	HEADCOUNT	PARAMETERS	IMPORT/EXPORT
<ul style="list-style-type: none"> <li>Administration           <ul style="list-style-type: none"> <li>Validate and initialize</li> <li>Locks</li> <li><b>Files</b></li> <li>Categories</li> <li>History &amp; email notifications</li> <li>Define surveys</li> <li>Configure parsing</li> <li>System note</li> </ul> </li> <li>Users           <ul style="list-style-type: none"> <li>Users</li> <li>User roles</li> <li>Password policies</li> </ul> </li> <li>Reporting           <ul style="list-style-type: none"> <li>Define P&amp;L layouts</li> <li>Configure P&amp;L layouts</li> <li>Report names</li> <li>Reports &amp; Quick Budget menu</li> <li>Tag sets</li> <li>Tags</li> </ul> </li> <li>Dashboard           <ul style="list-style-type: none"> <li>Configure dashboard</li> </ul> </li> <li>Currencies and foreign exchange</li> </ul>	<ul style="list-style-type: none"> <li>Time           <ul style="list-style-type: none"> <li>New fiscal year</li> <li>Years</li> <li>Quarters</li> <li>Periods</li> </ul> </li> <li>Versions           <ul style="list-style-type: none"> <li>Define versions</li> <li>F/X sets</li> <li>Calculation defaults sets</li> <li>Drivers defaults sets</li> <li>Unit event defaults sets</li> <li>Employee sets</li> <li>Account defaults sets</li> </ul> </li> <li>Units &amp; companies           <ul style="list-style-type: none"> <li>Units</li> <li>Companies</li> <li>Unit event defaults sets</li> <li>Configure unit event defaults</li> </ul> </li> <li>Accounts           <ul style="list-style-type: none"> <li>Configure accounts</li> <li>Configure stacks &amp; sections</li> <li>Map accounts to units</li> <li>Map accounts to subtotals</li> <li>Map accounts to sections</li> <li>Map events to accounts</li> <li>Configure allocations</li> </ul> </li> <li>Edit &amp; export           <ul style="list-style-type: none"> <li>Edit account data</li> <li>Export account data</li> <li>Edit prepop account data</li> <li>Export prepop account data</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Headcount configuration           <ul style="list-style-type: none"> <li>Edit employee data</li> <li>Import/export employees</li> <li>Employee sets</li> <li>Configure salary grades</li> <li>Configure employee classes</li> <li>Map events to accounts</li> <li>Unit event defaults sets</li> <li>Configure unit event defaults</li> <li>Configure headcount options</li> </ul> </li> <li>New hire policies           <ul style="list-style-type: none"> <li>Define new hire policies</li> <li>Configure new hire policies</li> </ul> </li> <li>Hourly employees           <ul style="list-style-type: none"> <li>Edit hourly employee data</li> <li>Define wage types</li> <li>Define wage classes</li> </ul> </li> <li>Pay schedules           <ul style="list-style-type: none"> <li>Define pay schedules</li> <li>Map to employee/wage classes</li> </ul> </li> <li>Benefits by employee           <ul style="list-style-type: none"> <li>Define benefit classes</li> <li>Map benefits to accounts</li> <li>Configure benefits library</li> <li>Configure benefits selections</li> </ul> </li> <li>Tax authorities           <ul style="list-style-type: none"> <li>National tax authorities</li> <li>National empl. tax rates</li> <li>State tax authorities</li> <li>State empl. tax rates</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Account defaults           <ul style="list-style-type: none"> <li>Account defaults sets</li> <li>Configure account defaults</li> </ul> </li> <li>Calculations           <ul style="list-style-type: none"> <li>Define calculations</li> <li>Calculation defaults sets</li> <li>Configure calculation defaults</li> <li>Configure allocations</li> </ul> </li> <li>Drivers           <ul style="list-style-type: none"> <li>Define drivers</li> <li>Driver defaults sets</li> <li>Configure driver defaults</li> </ul> </li> <li>Assets           <ul style="list-style-type: none"> <li>Configure asset classes</li> <li>Configure asset library</li> <li>Map asset classes to units</li> <li>Map events to accounts</li> </ul> </li> <li>ActionPaks           <ul style="list-style-type: none"> <li>Define shared ActionPaks</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Account data           <ul style="list-style-type: none"> <li>Import account data</li> <li>Export account data</li> <li>Review acct data import status</li> <li>Import prepop data</li> <li>Export prepop data</li> </ul> </li> <li>Other configuration           <ul style="list-style-type: none"> <li>Import/export configuration data</li> <li>Import/export employee data</li> </ul> </li> <li>G/L transaction detail           <ul style="list-style-type: none"> <li>Review G/L import status</li> <li>Import G/L transactions</li> <li>Export G/L transactions</li> <li>Manage G/L txn storage</li> <li>Configure G/L transactions</li> </ul> </li> </ul>

Some functions may be listed in more than one place.

For more detailed instructions on how to add **Admin files**, please click [here](#).

**2. User files** are files uploaded by a Budget Holder within their budget. User files can also be mapped to specific accounts.

- User files can also be uploaded by a BudgetPak Administrator via the Configuration menu, but they can also be uploaded by a Budget Holder on the Budget Navigation Map.

The screenshot shows the BudgetPak software interface. At the top, there is a navigation bar with options like Home, Dashboard, Versions, Status, Reports, Projections, Configuration, About, and a user profile for Jennifer. Below this is a sub-navigation bar with tabs for Navigation, ActionPaks, What if...?, View/edit drivers, Across the board (all line items), Monthly spreading (all line items), Notes (2), and Files (1/1). The main content area is divided into several sections: 'Currently viewing' with dropdowns for Company (ABC Organization), Unit (10-200-01: Marketir), and Version (2021 Final Budget); 'Headcount/FTE' with a table showing additions and reductions; 'Version comparison' with a table comparing 2020 Actuals, 2020 Final Budget, 2021 Target Budget, and 2021 Final Budget; and 'This unit: Marketing' with a table showing Total, Your difference, and percentages. Below this is a 'Your budget:' section with a progress indicator (You are here, Reviewed) and a grid of budget categories: Revenue, Cost of Services, Headcount & Salaries, Benefits, Travel & Meeting Related, and Marketing Expenses. Each category has a table with 'Across the Board Change' and specific items like Sales Revenue, Third Party Software, New Hires, Medical, Training Fees, and Photography.

For more detailed instructions on how to add **User files**, please click [here](#).

## XLerant Learning Series Webinars

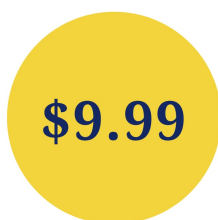
*We will be covering new features as well as providing refreshers on current features.*

**Our latest webinar was on the topic:  
Forecasting Part 2 of 2 - Detailed Forecasts  
[Watch it 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).

## Thinking Differently - Price Tag



Many shops have prices set just under a round figure, e.g. \$9.99 instead of \$10 or \$99.95 instead of \$100. It is assumed that this is done because the price seems lower to the consumer, but this is not the reason the practice started. What was the original reason for this pricing method?

[Give up?](#)

XLerant | 203-883-4380 | [services@xlerant.com](mailto:services@xlerant.com) |  
[www.xlerant.com](http://www.xlerant.com)



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