



## The XLerant NewsPak - February 2021

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### You asked...we delivered

*The latest release of BudgetPak included the following enhancements:*

- **P&L Consolidating Report - Run with configurable P&L:** This report now supports statistical accounts on a configurable P&L layout (if one is in use).
- **Headcount Details Reports - All compensation event details, and employee notes:** If "include extended detail" is selected for a headcount details report, then a full set of columns (% change from base salary, \$ amount, and event date) for each compensation event are displayed.
- **Configure Account - Clone Accounts:** Making a copy of an existing account is now easier with the new option to **Clone** any account.
- **Hourly Salary Increases - Increases by amount:** Raises applied to hourly employee rates can now be designated by a currency amount, as well as by a percent.
- **Hourly Employee Allocations - Map different accounts to units by wage type:** Previously, each allocated unit had to use the same account for each wage type. Now you are able to map wage types individually by allocated unit.
- **Monthly Spreading (all line items) - Sort accounts by account number:** By default, the monthly spreading page groups accounts first by non-discretionary accounts and then discretionary accounts, in account number order within each group. You can now choose to suppress the grouping and view all the accounts by account number, regardless of their discretionary/ non-discretionary status.
- **And more...**

To read more about these enhancements, read our [release notes](#).

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### Did you know?

*Did you know you can clone, or duplicate, an existing account in BudgetPak?*

The **Configure Accounts** configuration page has been updated to allow for cloning of existing accounts using a **Clone** button, which is available next to each account:

**BudgetPak**  
Budget. Forecast. Report.

Home Dashboard Versions Status Reports Projections Configuration About Welcome, Jennifer! Log Out

## Configure accounts

Configure both enterprise and company accounts here. When you configure accounts for the enterprise, the Source fields do not apply. Each company account must be mapped to an enterprise account. Multiple company accounts may be mapped to a single enterprise account.

Company: ABC Organization Number of accounts: 85

Show company accounts by themselves  
 Show company accounts underneath their parent enterprise accounts

Filter Moving and sorting are disabled because filters are applied. Actions

Edit	Account number	Description	Account source	Account class	Enterprise account	Restricted?	Must have user comment?	Instructions	Final fiscal year	Map to all	Unmap from all	Delete	Actions
	40000	Membership Fees	calculation	Income	3000: Revenue	<input type="checkbox"/>	<input type="checkbox"/>	The Membership Retention a					Clone
	40100	Sales Revenue	user	Income	3000: Revenue	<input type="checkbox"/>	<input type="checkbox"/>	Sales Revenue is calculated u					Clone
	40200	Merchandise Revenue	user	Income	3000: Revenue	<input type="checkbox"/>	<input type="checkbox"/>	Import your merchandise mo					Clone
	40300	Other Revenue	calculation	Income	3000: Revenue	<input type="checkbox"/>	<input type="checkbox"/>	Other Sales Revenue has bee					Clone
	40400	Event Revenue	calculation	Income	3000: Revenue	<input type="checkbox"/>	<input type="checkbox"/>	Use the view/edit drivers fun					Clone
	50000	Third Party Software	user	Expense	1100: Third Party Software	<input type="checkbox"/>	<input type="checkbox"/>	Third Party Software is calcul					Clone
	50100	Hosting Costs	user	Expense	1101: Hosting Costs	<input type="checkbox"/>	<input type="checkbox"/>	Hosting Costs are calculated i					Clone

When the **Clone** button is selected next to an account, the *Add Account Guide* opens. A new account number must be supplied, but all other account attributes can stay as-is unless you choose to modify them.

**Add Account Guide**

**Account basics**

Account details

Section and subtotal mapping

Headcount account mapping

Asset account mapping

Calculation selection

Calculation configuration

Statistical acct config (addition)

Statistical acct config (subtotal)

Unit mapping

Report layout

Review and create

Welcome to the Add Account Guide!

You'll be guided through each of the steps needed to add an account to ABC Organization. Not all of the steps will be needed for all types of accounts; steps that aren't necessary will automatically be skipped. Nothing will happen to the system until you get to the final step and click 'Finish'.

Start by providing the basic identifying information for your account.

Please note that the account number you provide here should not be your full G/L string, but be the portion of your G/L string that is extracted for use with BudgetPak. (See 'Set up parsing' in the configuration menu.)

Account number:

Account description:

Account class:

You can restrict the visibility of an account to authorized budget holders only. (You might want to do this for, for example, salary and bonus accounts.)

Is this account restricted?

To watch a how-to video on cloning an account, 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:  
 Highlights from our Latest Release  
[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 - The Four Dollar Book



A woman walked up to a man behind a counter and handed him a book. He looked at it and said, "That will be four dollars." She paid the man and then walked out without the book. He saw her leave without it but did not call her back. How come?

