



## The XLERANT NewsPak - March 2021

### New end user training videos

*Have a new budget holder, or want more information on the different budgeting options?*

We have added a bunch of short end user training videos to our support site. These videos cover topics such as the 6 budget methods, across-the-board spreading, monthly spreading, budgeting using on-demand templates, ActionPaks, and more.

You can use the search feature to find videos on topics that interest you, or you can go here to see a list of all the new [end user training videos](#).

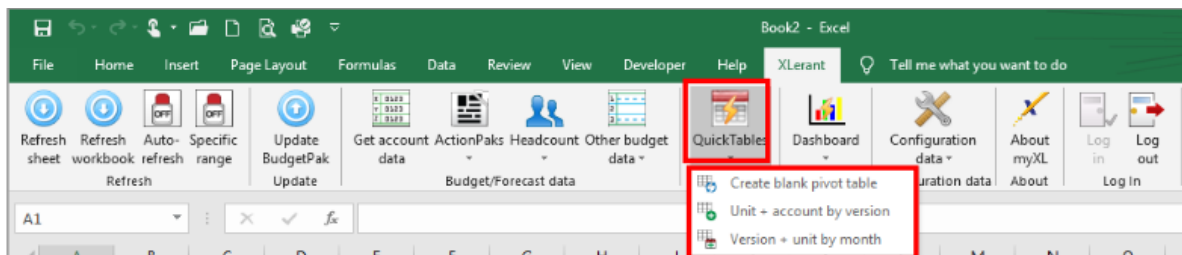


### Did you know?

*Did you know you can use myXL QuickTables to help you create pivot tables in Excel?*

QuickTables are a convenience feature of BudgetPak. They allow you to quickly create an Excel pivot table from predefined measures and data. The result is a normal Excel pivot table, which can subsequently be modified any way that you wish for ad-hoc analysis or custom reporting.

You may, of course, create a pivot table yourself from scratch by first invoking the "Get Account Data" command from the Budgeting/Forecasting data toolbar. The QuickTables commands cuts down the number of steps required.



There are 3 QuickTable Commands available:

1. **Create blank pivot table:** Use this command to create a pivot table defined by data returned from the "Get Account Data" function, but with no pivot table rows or columns predefined.
2. **Unit + account by version:** Units and accounts are predefined as pivot table rows, and versions predefined as pivot table columns. Once created, the pivot table can be adjusted to meet your needs.
3. **Version + unit by month:** Versions and units are predefined as pivot table rows, and months are

redefined as pivot table columns. Once created, the pivot table can be adjusted to meet your needs.

Here is an example of the **Unit + Account by Version** pivot table. This pivot table can be used to see a full view of all units and accounts in one report.

Unit + Account By Version Example				VersionDescription	Period		
Account Value				2021 Budget - Conservative Plan   2021 Budget - Growth Plan   2021 Final Budget			
UnitCode	AccountClass	DefaultSubtotalDescription	AccountDescription	ActionPakDescription			
10-200-01	Income	Income	Allocated in Revenue		2,950,042.91	3,119,236.55	2,992,605.00
			Event Revenue		512,190.00	662,550.00	631,000.00
			Membership Fees		13,320,936.00	15,390,117.00	14,353,056.00
			Merchandise Revenue		536,797.79	573,204.38	590,536.63
			Other Revenue		525,525.00	563,062.50	536,250.00
			Sales Revenue		8,676,596.79	8,676,596.79	8,338,425.00
			<b>Income Total</b>		<b>26,522,088.49</b>	<b>28,984,767.22</b>	<b>27,441,872.63</b>
	Expense		Compensation & Benefits		-1,669,596.84	-1,669,596.84	-1,875,157.08
			Cost of Services		-2,355,076.27	-2,602,979.04	-2,229,825.00
			Other Expenses		-118,140.73	-118,140.73	-119,540.73
			Photography/Printing/Advertising		-4,707,012.50	-5,641,762.50	-4,763,729.38
			Professional Fees		-11,855.26	-11,855.26	-97,657.17
			Rent & Occupancy		-75,249.98	-75,249.98	-78,458.32
			Travel		-572,721.25	-572,721.25	-546,176.02
			<b>Expense Total</b>		<b>-9,509,652.83</b>	<b>-10,692,305.60</b>	<b>-9,710,543.70</b>
<b>10-200-01 Total</b>					<b>17,012,435.66</b>	<b>18,292,461.62</b>	<b>17,731,328.93</b>
10-300-01					-1,902,503.61	-1,902,503.61	-1,892,204.81
10-400-01					-1,367,707.19	-1,367,707.19	-1,367,707.19
10-500-01					-2,333,530.18	-2,333,530.18	-2,334,726.63
10-500-03					-3,735,799.61	-3,735,799.61	-3,801,768.87
20-100-03					-654,462.86	-654,552.66	-685,387.63
20-200-02					-1,226,747.39	-1,230,941.16	-1,257,396.20
30-100-02					656,899,249.03	684,877,555.15	637,463,139.63
30-200-01					1,534,009.15	1,596,778.37	1,313,175.25
40-300-03					-2,667,732.39	-2,667,732.39	-2,662,296.94
40-400-02					-4,864,224.50	-4,864,224.50	-5,103,310.17
40-500-02					-1,228,910.36	-1,228,910.36	-1,262,102.20
<b>Grand Total</b>					<b>655,464,075.75</b>	<b>684,780,893.48</b>	<b>636,140,743.17</b>

To watch a how-to video on all the available myXL ribbon functions, click [here](#).

## XLerant Learning Series Webinars

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

**Stay tuned for our next Learning Series Webinar**

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 - Push that Car

A person pushed their car. They stopped when they reached a hotel at which point they knew they were bankrupt. Why?

[Give up?](#)