CPA
Practice Advisor

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www.xlerant.com

From the 2018 reviews of Cash Management systems.

BudgetPak from Xlerant offers a cloud based budgeting, forecasting, and reporting solution. Delivered as Software as a Service (SaaS) BudgetPak is well suited for small to mid-sized businesses. BudgetPak offers an easily navigated user interface, quick product implementation, and a series of dashboards and scenario models. BudgetPak uses Guided Analysis, making it easy for even non-accounting personnel to enter forecasting and budgeting totals.

BudgetPak's user dashboard provides access to all system functions, as well as a variety of options that users can click on including Create New, to create a new budget or forecast, Open Last, to access the last budget or forecast utilized, Review Status, which allows users to review all of the companies/organizations that they are responsible for. There is a Run Reports option available as well.

BudgetPak's real strength is in its budgeting capabilities, designed to assist users in creating a comprehensive budget. Users can choose to create a new budget or new forecast, or do both tasks simultaneously. Users can choose whether to use a baseline total or use zero based budgeting. The budget interface is terrific, offering users options is categories, such a Revenue, Headcount and Salaries, Benefits, Occupancy Related, Marketing Expenses, and Travel and Meeting Expenses, with various tabs below each category that users can utilize when creating a budget. Each business provides Xlerant with their own custom categories and related accounts, which is built out during implementation. When creating a budget, a version comparison is displayed on screen, so users can see the changes and impact to targeted budgets in real time.

BudgetPak uses budgeting totals and actuals in order to create a comprehensive

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application.

BudgetPak supports a variety of user types, with some end-users only having access to their department totals; keeping information such as payroll confidential. The product is hosted by a Tier-3 data center located in the United States.

Reporting options in BudgetPak are solid, detailed budgeting and forecasting reports available, along with both variance and analytical reports available as well. All reports in BudgetPak can be displayed on screen, printed, exported to Microsoft Excel, or saved as a PDF. The product also offers specialized reporting, offering bi-directional linkage to Excel in order to create additional reports using data from BudgetPak.

BudgetPak offers a free demo, and those interested can view the numerous webinars, eBooks, and white papers available on their website. Implementation can take between six to eight weeks, with businesses providing the background information, and BudgetPak creating the application. Pricing information for BudgetPak can be obtained directly from Xlerant.

Overall Rating – 5 Stars

Small Business

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