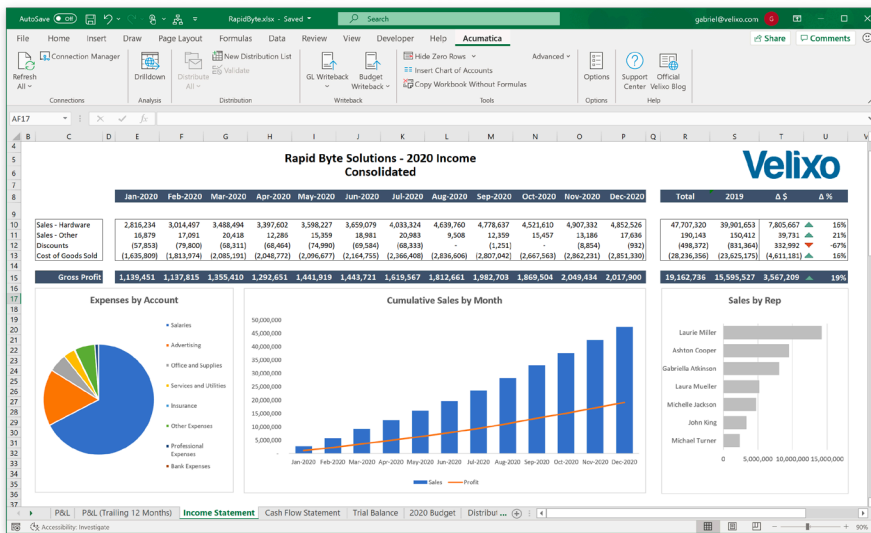# EXCEL-BASED REPORTING FOR ACUMATICA

BUILD YOUR OWN REPORTS IN EXCEL
WITH LIVE DATA IN LESS THAN 5 MINUTES

Velixo Reports is an Excel-based reporting tool that was built from the ground up for Acumatica, by Acumatica Experts. Velixo Reports adds a new toolbar to Excel and more than 60 functions specially designed to work with General Ledger, Project Data and Generic Inquiries.

As the premier solution for reporting with Acumatica, Velixo provides a tight integration and leverages the unique capabilities of your Acumatica Cloud ERP with features such as Smart Drilldown, Smart Refresh, Writeback, Consolidations and Advanced Security.

It's simple yet effective execution allows your entire team to benefit, helping your business make better decisions. If you know Excel, you can do it!

Testimonial

"I love Velixo. It's user-friendly and incredibly quick. I actually trust Velixo reports and have peace of mind knowing I'm capturing everything since it's integrated with Acumatica."

- Lettie Wiemann,
  Controller, Vanguard Resources

Easily Connect Excel to Your Acumatica Data	Lightning Fast, Always Live	The flexibility of Excel with the Power of Acumatica Analytical Reports
• Designed with the Excel user in mind	• Data is loaded & refreshed in a matter of seconds thanks to Smart Refresh	• Powerful formatting and data visualization capabilities including tabs, conditional formating, charts and data grouping
• Installs in seconds		
• Connect using your Acumatica login credentials and start building spreadsheets that instantly include Acumatica data	• No more exports or manual entries required – you're always working with the most up-to-date data	• Consolidate data from multiple tenants and companies
		• Combine GL, PM, generic inquiries and data from other sources and spreadsheets into a single report
• If you know how to use Excel, you already know how to use Velixo Reports	• Changes you make to formulas and cells are reflected immediately in your spreadsheet	• Easily drilldown to the original document in Acumatica

THE VELIXO DIFFERENCE

ZERO LEARNING CURVE

• If you know how to use Excel, then you know how to use Velixo Reports

• As easy as Excel, as powerful as Acumatica Analytical Reports

PEACE OF MIND

• Backed by the worldwide network and expertise of Acumatica partners

• Automatic updater ensures that you always have the latest features and improvements

• Access to an online community and a self-service support portal

GROW WITHOUT WORRY

• Unlimited user licensing allows you to grant access to anyone who needs it, at no extra charge

• Give your whole workforce the benefit of up-to-date information

VELIXO REPORTS FEATURES AND CAPABILITIES	
General Ledger Functions	User-friendly Excel functions let you retrieve account balances from any ledger (including budgets) as well as additional information related to your financial periods, chart of accounts and branches. Filtering can be done by tenant, ledger, account, subaccount, branch and financial period.
Generic Inquiry Functions NEW!	User-friendly Excel functions let you retrieve data from any generic inquiry. Filtering can be done on any column of the inquiry using the simple GIFILTER() function or by using the OData query language for more flexibility.
Project Functions	User-friendly Excel functions let you retrieve project balances, project budgets, committed amounts and quantities, as well as additional information related to projects and tasks. Filtering can be done by tenant, project, project task, account group, cost code and inventory item.
Filtering and Selection	Full control over the data to be included in any calculation. Combine multiple items (ex: accounts, subaccounts or projects) in the same function, use ranges, wildcards and exclude or substract individual items as needed.
Security	Use the same login and password that you use when connecting to Acumatica from a web browser. You can restrict access to specific roles and users. Branch access rights as well as account and subaccount restriction groups are also applied, allowing you to control who has access to what. Single sign-on supported.
Consolidations	A single spreadsheet can consolidate data from multiple companies, tenants, instances, in the cloud or on-premise.
Offline Mode	The data used for calculations is stored in a local cache, allowing you to work on your reports even when an internet connection is unavailable.
Automated Report Distribution	E-mail, export and share multiple versions of the same report in a single click. Include different tabs or set different parameters based on the recipient. Output as Excel, PDF, Values and optionally password protect the files.
GL Writeback	Create and post GL entries without leaving Excel. The content and amounts of the GL entry can be dynamic and based on Excel formulas.
Budget Writeback	Retrieve multiple budgets or forecasts, report them in Excel, adjust the numbers or apply your own budget model and write back the modified budget back to Acumatica.
Project Forecast Writeback NEW!	Retrieve multiple project forecasts, report them in Excel, adjust the numbers or apply your own budget and write back the modified project forecast back to Acumatica.
Compatibility	Acumatica 5.3 and later (SaaS, Private Cloud, On Premise versions support). Excel 2010 for Windows and later. Excel 365 required for Generic Inquiry functions.