

Tbsp.

Reporting, budgeting & automation in Excel for Sage Intacct

Velixo Webinar



- Slides will also be available after the webinar.
- We encourage questions! Please use the Q&A box. Questions will be answered at the end of the presentation.
- If you have any technical difficulties, please use the chat feature.

Q&A

[All questions \(1\)](#)[My questions \(1\)](#)

Jack Barker 2:34:08 PM

When is the next webinar?

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About Tablespoon

Tbsp.



Established 2007



Exclusively serves the
restaurant industry



We help franchise owners
in three key areas:

Accounting software and
systems (Sage Intacct)

Outsourced accounting services

Financial consulting



Our mission is to help
restaurant companies
grow faster and more
effectively.

About Velixo

Founded in 2017, we are a multi-award ISV winner that brings ERP data to life by augmenting the reporting & planning experience of your ERP and deeply integrating with its feature. Global footprint with 2000+ customers and 200+ partners.

Users love us so much; we have a perfect satisfaction score.



HQ – Montreal, Canada



Office / Team member



Partner network

Our team of tech and ERP professionals is distributed and diverse. What unites us is our common focus on user experiences and solving the real problems that bring real value!



Gabriel
Michaud
Founder



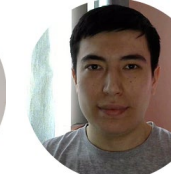
Pavel
Kabir
CTO



Duffy
Cohen
VP, Sales & CS



Damien
Zwilling
CPO



ERPs' dirty little
secret:

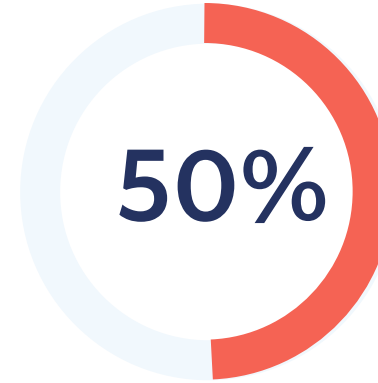
everything
happens in
spreadsheets



The problem with manual spreadsheets

Manual spreadsheets

- Disconnected experience. Data becomes obsolete
- Repetitive and time consuming
- Error prone / governance issues
- Changes cannot be written back to ERP



... Finance and operations spend over 50% of their time gathering data from spreadsheets, ERP systems or third-party systems.

[McKinsey & Company](#)

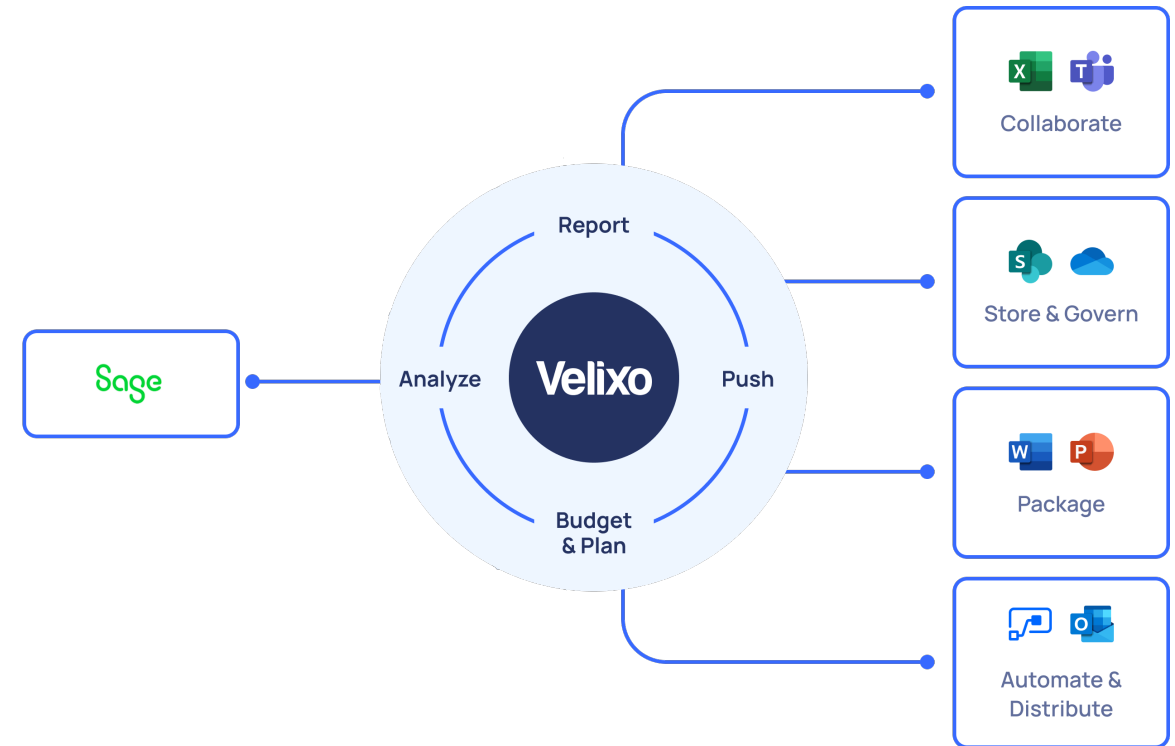


... introducing a connected and automated reporting and budgeting solution can increase an organization's efficiency by 60%, whilst reducing any IT dependency.

[McKinsey & Company](#)

Introducing Velixo for Sage Intacct

- ✓ Excel add-in, up-to-speed in minutes
- ✓ Real-time reporting, exploration and templates
- ✓ Direct data writeback to Sage Intacct (GL Journals, Budget, Dimension allocation)
- ✓ Native functions & pixel-perfect formatting
- ✓ Respect Intacct's security
- ✓ Fully integrated to Microsoft 365



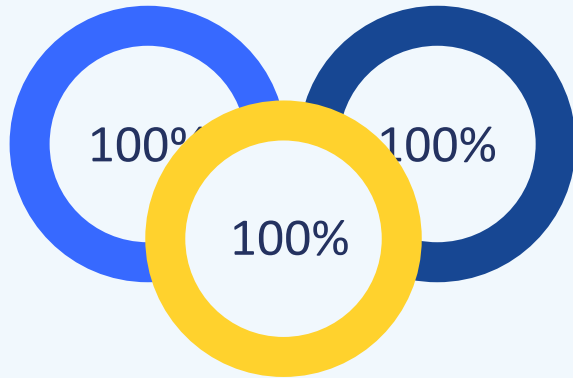
Some of our happy customers



Achieve significant outcomes



Make key decisions faster

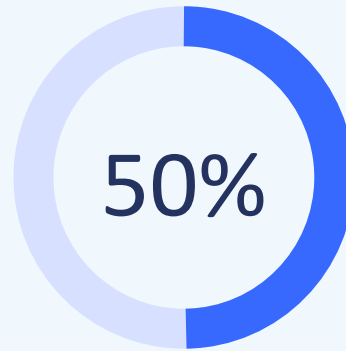


+300% in reporting speed

Instant, ad-hoc financial and operational reporting



Save on labor costs, on all fronts

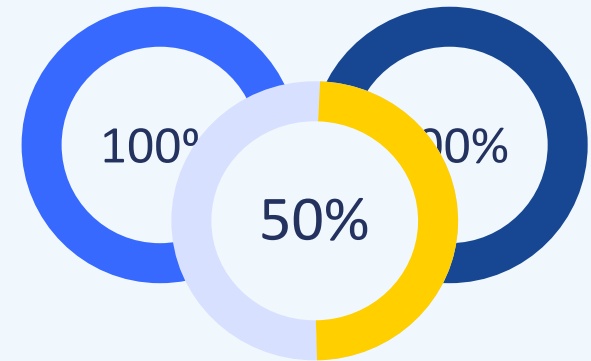


+50% reduction in month-end close time

Month-end preparation savings



Become more efficient



+250% data entry efficiency

With live writeback for Journals, Budgets, Project forecasts or any data.

What they say about us..

"It was an easy decision to utilize an **excellent, well-developed**, well-maintained tool on the market than to attempt other paths. Velixo had the **right features, functionality**, and ease of use to make it an **easy decision for any business.**"

Morgan Taylor
VPI Group
CFO



"We have cut our financial report generation process down to **minutes and not hours**. We can turn around ad-hoc financial requests instantaneously. It has made our **process fast, lean and more transparent.**"

Joseph Steele
Quick Quack Car Wash
Director of IT



"Velixo cut Mid-States Companies' **estimate and proposal manhours in half**.
If you don't have Velixo, you're crazy."

Andrew Pistorius
Mid-States Companies
CFO



Trusted by thousands of companies



What they say about us..

"Velixo Reports has **drastically reduced the amount of time** it takes for my **month-end** financial statement preparation. I couldn't be happier. Excellent product."

Larry Hooks
Berthold technologies
Controller



"The ability to write my forecasts back in bulk saves me lots of back and forth and manual entries, I estimate it **reduces our budgeting process from days to hours.**"

Donna M. James
Cornell Cooperative Extension
Finance Manager



"Integrating our Excel-based custom forms to Velixo Writeback completely automated manual entry for us. It's probably **days of work saved at the end of the month.**"

Michael Criner
Habitat for Humanity of Denver
COO



Trusted by thousands of companies



Contact Tablespoon

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