

CASE STUDY

Increase efficiency and productivity with information at your fingertips.

Company Name
Mid-States Companies

Location
Nevada, IA

Industry
Manufacturing

ERP System
Acumatica ERP

ABOUT MID-STATES COMPANIES

Mid-States Companies offer premier millwright, design, crane, and trucking services. Our fabrication company offers quality structural steel products and material handling equipment. We are committed to building professional working relationships with each of our clients. It is our mission to anticipate, recognize and exceed our customer's expectations.

KEY CHALLENGE

Project estimating and quoting in a disconnected Excel workbook led to inefficiencies, inconsistency, and significant manual effort to maintain accurate data.

50%

Velixo's integration with Acumatica cut Mid-States Companies' estimate and proposal manhours in half.

SOLUTION

Velixo completely changed how project managers estimate projects with live ERP data, speeding up the project timeline and keeping the ERP and Excel sheets in sync.

VELIXO – GAME CHANGER

- **Streamlined Quoting:** Workbooks are now fully bidirectional. Live data (materials, pricing, vendors) flows into Excel sheets for estimating purposes and then writes back to Acumatica with one click to either create or update records.
- **Data Validation:** With Velixo’s list and Generic Inquiry functions, data validation lists in Excel provide live, up-to-date selections without manual effort. This supports best practices at Mid-States by requiring data to be properly updated in Acumatica (creating new vendor records, etc.) early in the order process.
- **Reducing Manual Effort:** The Projected Cash Flow report, managed in Excel, no longer requires manual updates since Velixo workbooks are always up to date!
- **Reconciling Data:** Utilizing Excel functionality to easily identify data that no longer matches Acumatica, then leveraging Generic Writeback to mass update those records and preserve the single source of truth.
- **Unlimited User Licensing:** 40 people at Mid-States use Velixo-enhanced spreadsheets. Since they are not paying per user, they are maximizing the value of their Velixo subscription and empowering the entire team. Live connectivity and data validation preserve standardized forms for projects.



KEY QUOTES

ANDREW
PISTORIUS
CFO

“ If you have Acumatica and don’t have Velixo, you’re crazy! ”

Velixo

Velixo Reports is the only reporting tool of its kind designed exclusively for Acumatica. We used our extensive experience with Acumatica to craft a user-friendly Excel plugin that is lightning fast and leverages the unique capabilities of your cloud ERP.

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