MYOB Velixo Reporting

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Velixo Reporting is an Excel-based reporting tool integrated with MYOB Advanced, built from the ground up for MYOB Advanced, by MYOB Advanced Experts.

Velixo Reporting adds a new toolbar to Excel and more than 80 functions specially designed to work with General Ledger, Project Module, Writeback and Generic Inquiries. As the premier solution for reporting with MYOB Advanced , Velixo provides a tight integration and leverages the unique capabilities of your MYOB Advanced solution 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 how to use Excel, then you know how to use Velixo Reporting . Its as easy as Excel, and as powerful as MYOB Advanced Analytical Reports.

Why MYOB Velixo Reporting?

- Be self sufficient using a familiar tool (Excel) to streamline reporting and analysis across the whole database

- Consolidate data from multiple sources (multiple tenants) including other external sources.

- Financial reporting made easy with GL and budget writebacks

- Build any type of reports with charts, graphics and KPIs

- Smart drilldown to original document in MYOB Advanced

- Secure access by controlling who has access to what and automatically share reports.

- Ensure key stakeholders get access to information that matters in a timely manner using Velixo's distribution feature.

Ideal Customer

- Does manual Excel reporting

- Has reporting pain from repetitive tasks

- Needs data and reporting across all parts of the business

- Structured GL

- Has Board Reporting Requirements

- Analyses Data past basic reporting

- Can use writeback and distribution

VELIXO REPORTING - 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	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 subtract individual items as needed.
Security	Use the same login and password that you use when connecting to MYOB Advanced 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 MYOB Advanced.
Project Forecast Writeback	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 MYOB Advanced.
Compatibility	MYOB Advanced 2019.x.x and later. Excel 2010 for Windows and later. Excel 365 required for Generic Inquiry functions.

MYOB

MYOB Velixo Reporting Licenses*

Lite user license *Free*

(includes Summary P&L and Balance sheet report)

Restricted functionality:

- Limited to 2 active sheet with limited velixo functions

- Drilldown included

- Writeback, Distribution, GI, multi tenant excluded

Single User

(includes basic financial reporting pack)

5 users

(includes basic financial reporting pack)

Unlimited users

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

(includes basic financial reporting pack)

* Please refer to latest MYOB Advanced Business pricelist for pricing details

	Lite User	Single User	5 users	Unlimited users
Connection Manager	Single connection & single tenant			
Sheet restrictions	2 tabs	None	None	None
General Ledger Module	Limited to 1000 GL functions			
Project Module				
Velixo tools				
Multi company				
Smart drilldown				
Distribution				
Writeback				
GI Module				
Report pack	• P&L Summary • Balance Sheet Summary	Basic Financial Pack: • P&L Summary • Balance Sheet Summary • P&L 12 month • P&L 12 month detail • Revenue Trend • Expense trend • Dashboard		

What is the Velixo LITE License?

The LITE license is a restricted license of Velixo that **should be deployed on any MYOB Advanced site** that does not have a full Velixo license. Lite license is restricted in functionality and whilst you can build most financial reports with it, the best application is summary reports across the Account Classes.

There are many applications of the LITE license, below are some examples of where and how to use it:

- **Taster of Velixo**

    Any new site should have a Velixo LITE license which then enables a conversation to be started with the customer about a full license and complete feature suite of Velixo.

- **New Sites (No Velixo)**

    There is always a need to build basic reports into the system for new Customers ready for Go Live. The LITE license with the free report gives a new site their P&L and B/S in Excel rather than creating them in ARM.

- **Testing for Customers**

    Installing and giving a user access to the Lite license will enable them to have a good look at how the financial functions work. If they then wish to see more, a Trial license can be provided to enable the customer to fully comprehend the power and functionality of Velixo. If the customer decides to not go ahead with a full license, the LITE license is reinstated at the end of the trial.