



## VLS Builds Real-time BI Capabilities with Velixo and NexTec



### About VLS Environmental Solutions

VLS is a leading environmental solutions company operating across the United States and parts of Mexico. The company has grown through strategic acquisitions, expanding its services in waste management, railcar cleaning, marine services, and innovative environmental solutions.

VLS implemented Velixo alongside Acumatica in 2023 with NexTec Group as their implementation partner. Velixo works to bridge the gap between Acumatica Cloud ERP and Excel, giving users easy access to their data. Initially, VLS used Velixo just for financial statements until Chris Lerma, Director of FP&A at VLS realized that they could be doing a lot more with the tool.

**"We see NexTec as a strategic partner in helping us streamline and automate many of our BI and reporting tasks to enable us to do more with the resources we have."**

Chris Lerma, Director of FP&A, VLS Environmental Solutions



## Key Results

- > Dozens upon dozens of hours saved per month preparing reports.
- > What took many hands and multiple file transfers can now be accomplished with minimal manual intervention.
- > More accurate data for decision-making.
- > Executives can drill down into financial data with just a few clicks.

"When Chris joined VLS about a year ago, he started asking what else they could do and that's where I came in to help them work through a more efficient, automated budgeting and forecasting process using Velixo," says Mary Miller-Friedman, Director of Consulting – Business Intelligence at NexTec Group.

"Going through the budget process last year, we started out very much manual and dependent on Excel and, by the time we finished, it was very much Velixo-oriented and automated," Lerma recalls. "That's when I had my light bulb moment and realized we're not even scratching the surface with Velixo."

"I told my boss, Chris Terrell, CFO of VLS, 'You know, we're using Velixo, but I don't think we're really using Velixo. There's so much more to it that we're not taking advantage of.' That's when we reached out to NexTec to help guide us on next steps, turn some ideas we had into reality, and show us a few things we hadn't thought of yet ourselves."

### Overcoming Manual Reporting Challenges

Beyond creating financial statements, VLS relied on a complex, manual process for its more advanced supplemental financial reporting. This involved multiple file transfers and numerous team members touching data throughout the month-end close process.

"Our financial reporting has historically been a very manual process with a lot of different hands involved," Lerma explains.

"Data is entered into our proprietary job system, say by someone keying in data from a truck on a scale at a job site. That data gets retrieved by a controller that oversees a specific region or division, and they upload that into a tracker.

The data subsequently comes to the FP&A team in multiple trackers. We take that data and then, again, move it to another file that consolidates all the data and creates what we call a mass balance file. And that's how we report up and then we take the revenues associated with that and do the math to get our price per ton data and build out our graphs that way."

The team was spending dozens of hours each month compiling and verifying data, with multiple team members involved in transferring and checking information. This approach was not only time-consuming but also prone to errors.

“With so many different hands touching the data, we knew we had an opportunity to automate some of the manual tasks that could potentially lead to errors,” Lerma says. “By extending our use of Velixo, we look forward to improving the accuracy and consistency of how we pull and report on our data – and, of course, we want to reduce the time and manual effort required.”

### **A Strategic Partnership with NexTec**

Working closely with Mary Miller-Friedman from NexTec, VLS began to explore the full potential of Velixo. Miller-Friedman had worked with other NexTec clients to pull in volumetric data, and VLS saw the potential of implementing this approach.

“Mary is my main point of contact at NexTec in terms of Velixo and she’s very knowledgeable, responsive, and willing to make time for us,” Lerma says. “She recently spent two days on site with our extended team, and it was a great experience and a productive couple of days. She provided a level of comfort and support that you just don’t get from the screen when you’re meeting remotely.”

“There was a lot of genuine excitement in the room when the accounting team learned what Velixo could do and more than a few ‘Oh, wow’ moments as Mary created reports for us on the fly and walked through how the solution could save us time and transform our accounting processes,” Lerma adds.

“Sometimes I go into a company that wants to shake things up and introduce more efficient tools, and there’ll be people who are resistant to change or concerned about ownership and job security,” says Miller-Friedman. “I never got that sense at VLS. Everybody was just so busy, and they were like, ‘Wow, you can help me – great!’”

### **Transforming Reporting Processes**

While VLS is still in the early stages of extending its use of Velixo, the collaboration with NexTec has opened the door to several key improvements:

**Automated Volume Reporting:** The team developed an Environmental Impact Reduction (EIR) report using Velixo that significantly reduced manual data handling. What previously took dozens of hands and multiple file transfers can now be accomplished with minimal intervention.

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Director of Business Intelligence  
NexTec Group

**Enhanced Accounts Receivable and Payable Reporting:** Custom templates created for AR aging, AP aging, and other key financial reports.

**Improved Data Access:** The integration between Velixo and Acumatica allows for deeper business insights with executives now able to drill down into financial data with just a few clicks.

### **Benefits and Results**

The results have been transformative. Lerma estimates they are saving “dozens upon dozens of hours a month” through the new reporting process. The team can now quickly and easily generate reports, with automated graphs and dynamic data retrieval.

“Working in Velixo, we can pull in massive amounts of data, drill down, and click a link that takes us straight to the transaction in Acumatica,” Lerma says. “Velixo is so intuitive that I’ve taught some of our executive vice presidents how they can go into the P&L, drill down, and easily get the answer they’re looking for.”

The solution is also helping VLS more quickly and accurately pull volume and financial data for its private equity sponsor.

### **Looking Forward**

Velixo has opened up new possibilities for VLS. The team is now focusing on enhancing their budgeting and forecasting process, creating more comprehensive budget books, and continuing to find ways to automate and streamline their financial reporting.

“Chris and his team got to the point where they were comfortable with Velixo and happy with their financial statements,” says Miller-Friedman “And that’s where a lot of people stop, but Chris took that initiative, poked around online, and started to get a sense that Velixo could do more. Now, with a little help from NexTec, they are starting to see all the benefits of Velixo and Acumatica, which span accounts receivable and payable, budgeting and forecasting, and so much more.”





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