

# Vanguard Resources Goes Global with Mindover Software and Acumatica

*An Acumatica Success Story*

## Company Profile

Name: Vanguard Resources

Industry: Facility  
Management Services

Location: Spring Branch, TX

Website:  
vanguardresources.com

## Challenge

Vanguard Resources was expanding at a healthy pace and had outgrown their QuickBooks accounting package.

## Solution

Vanguard Resources turned to trusted partner, Mindover Software to implement Acumatica and Velixo Reports.

## Results

With visibility into their data and the capability to access it when they needed it, from wherever they are, Vanguard Resources is set up for success as they continue to grow.

For more than twenty years, Vanguard Resources has provided facility management services across industries such as health care, education, business and industrial. Headquartered in Spring Branch, Texas, over the years Vanguard has expanded with locations across the southern states: Oklahoma, Arizona, Louisiana, Florida, South Carolina, and now branching into Kansas. With large customers such as Boeing and Tenet Healthcare, Vanguard's business has been steadily on the rise.

With that growth, however, came data and reporting challenges. "We knew we needed to start tracking all this data, and that we'd need more detailed accounting for the growth we'd had and the growth we were expecting," said Lettie Wiemann, Controller for Vanguard Resources. "We had a tentative business opportunity that would have doubled the business we had at the time. All our accounting was in QuickBooks, and we were fast outgrowing it. We needed to get data out to the field, to allow each of our different locations access to information on their particular facility."

### In Search of a Healthy Solution

To help them determine next steps, Vanguard relied on consultant Randy Roper, who had worked with the team since 2014 and is cleverly referred to as their "outsourced CFO," to create a needs analysis. "We needed a global reach that QuickBooks couldn't achieve



for us," Roper said. "In order to get that global reach, we knew we needed to move from an on-premises platform to something that was an enterprise level ERP. From there we invited the top 3 vendors in the SaaS accounting space to demo products for us."

One of those vendors was Mindover Software, the only one of the three who brought in the ERP solution Acumatica. And that, it turned out, was the winning solution. "We did a pros and cons analysis, and the best fit turned out to be Acumatica," recalled Roper. Partnering with Mindover would help Vanguard to move from its on-premises QuickBooks platform to an enterprise-level platform that would give them their desired global reach.

### The Power of Accessing Clean Data

Moving from QuickBooks to a larger platform such as Acumatica wasn't easy. "Implementing a new ERP is difficult at first—after all, we were importing five years of data during this process—but like anything new, it got easier as time went by," Wiemann said. While implementation was by no means a breeze, Vanguard lauded the Mindover team for their flexibility and partnership.

“Mindover’s excellent partnership guided and directed us, not letting us fall into any traps while still allowing us to adapt everything to our specifications.”

## Mindover Software

Mindover Software is a business software reseller offering a broad range of accounting, ERP and CRM software including Acumatica, Sage 100, Sage 300 and Sage CRM. From offices in Austin, Dallas, San Antonio, Idaho, San Diego and Connecticut, Mindover Software’s team of professional consultants help companies achieve greater efficiency, cost savings and profitability.

With over 2 million business customers worldwide, the software solutions we offer are completely focused on the SMB market. With Mindover Software as your business partner, you will receive the most complete software advice and implementation services and support available.

“Mindover was incredibly open to tailoring our implementation experience based on what our needs were,” Roper said. “Their excellent partnership guided and directed us, not letting us fall into any traps while still allowing us to adapt everything to our specifications.”

The result was an ERP system that finally gave Vanguard teams the capability to access the data they needed, when they needed it, from wherever they were. “With QuickBooks, we couldn’t have more than two or three people logged in at once,” Wiemann recalled. “But with Acumatica, we can have multiple users logged in, and not only is it working, it’s giving everyone current data all the time. We’ve got 36 users right now, with unlimited seats that will allow us the scalability to use it across the nation as we grow.” Which means Vanguard is already achieving their initial goal for the ERP implementation.

### Integrated Reporting with Velixo Reports

But it’s not just Mindover’s implementation of Acumatica contributing to Vanguard’s success. Alongside Acumatica, Mindover helped Vanguard install Velixo Reports, an Excel-based reporting tool built for Acumatica by Acumatica experts. This add-on allows users to build integrated spreadsheets that include live Acumatica data that is drillable,

refreshable, consolidated, and conforms to pre-defined security measures.

“I love Velixo,” Wiemann gushed. “It’s so 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.”

And it’s not just accounting and finance who love Acumatica and Velixo. Vanguard CEO Dustin Powers has history as a “techie” and former programmer. “He loves the architecture,” said Wiemann. “The C-suite loves Acumatica too. They love the dashboard capabilities it offers to them.”

While Vanguard’s team has had initial success moving to Acumatica, they know there’s more to learn. “I know Acumatica offers so much more than what we’re utilizing right now,” Wiemann said. “But we’re still in the initial growing and learning time. I know that with Mindover’s help, we’ll get it all customized so we can be even more successful as we grow and move forward.”

