

KEY COMPETITORS | COMPARISON BREAKDOWN

EXCEL ADD IN

HELPFUL CHECKLIST

By answering these questions below, you will get a better understanding of which solution suits your individual needs.

- Do you require data from outside the General Ledger?
- Do you need your financial reports within an Office document?
- Do you need to drill down (inside or outside of your General Ledger) to learn about what's driving the figures?
- Do you need to give your "business users" access to real time data, within editable reports (more than just a PDF).

REPORTING CAPABILITIES

Reports available when using Excel Add in

- | | |
|----------------------------|------------------------------|
| • Account | • Adjustments |
| • Budget Data | • Account Categories |
| • Cash Flow Forecasts | • Currencies |
| • Calendars/Fiscal Periods | • Organizational Hierarchies |
| • Budget Reservations | • Totaling Accounts |
| • Posting Layers | • Actual GL Data |

IF YOU WANT MORE, ATLAS CAN :

Reports available when using Office powered by Atlas

- | | |
|---------------------------------|------------------------------|
| • Account | • Adjustments |
| • Budget Data | • Account Categories |
| • Cash Flow Forecasts | • Currencies |
| • Calendars/Fiscal Periods | • Organizational Hierarchies |
| • Budget Reservations | • Totaling Accounts |
| • Posting Layers | • Actual GL Data |
| • Balance sheets | • Forecasting |
| • Income Statement | • Track profitability |
| • Department reports | • Aggregated reporting |
| • Company consolidation reports | • Sales analysis & trends |
| • Company expenses | • Commission based reporting |
| • Manage debt | • Induction / leave letters |
| • Management accounting | • Employee appraisals |
| | • Stock & inventory reports |
| | • Product orders |

- Positioned as an administrative tool

- Report from Microsoft Dynamics AX directly into Excel using a Pivot Table.
- Free format formula based reporting, which enable users to produce standard, daily reports Income Statements, Balance Sheets etc
- Reorder, and even add or remove columns in an existing report
- Link to filters within the Excel document. This gives complete flexibility to the report, reducing the need for specific product knowledge
- Includes many reports in the same table.
- Report form all companies within AX and to report form different companies within the same worksheet
- Atlas allows users to customize their list of data sources, and create specific role-based list of data sources
- Join tables based on existing relational joins, and in some cases to 'force' a join between two unrelated tables
- Users to drill down on balances and customize these drill downs
- Users to create contextual drill out, 'micro-reports'
- Once installed, Atlas is ready to be used by the end user (no need for Microsoft Visual Studio to make amendments)
- Atlas can be used to upload Customers, Vendors, Items, Projects etc

This information was published on May 2016 and is deemed to be correct on this date.

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