



## Analytics and Reporting

Gain greater insights into your organization and accelerate decision-making with reporting tools that deliver customized views of your business through personalized dashboards, so you can analyze trends in real-time.

- Single version of the truth
- Multi-dimensional reporting
- Security by role
- Custom reports and personalized dashboards
- Multiple display options

### Key business benefits

- Visualize data using tables, pie charts, and other graphics.
- Gain insights with live dashboards.
- Drill-down to detailed transactions.
- Create KPIs to measure progress toward configurable goals.
- Design custom dashboards with little or no training.
- Produce and share HTML, PDF, Excel, and Word report formats.
- Support generation of signed PDF documents and automate report delivery over email.

### Related resources

- Foster Profitability with KPIs > [LEARN MORE](#)
- ERP Software Guide > [LEARN MORE](#)
- Schedule a Personalized Demo > [LEARN MORE](#)

## Visualize and Analyze Key Data with Insights Across Your Entire Business

Acumatica accelerates decision-making with reporting tools that deliver personalized views of your business to every department. Tailor real-time, role-based reports, inquiries, and dashboards with security to control access to sensitive information.

### PERSONALIZED REPORTING EXPERIENCES

Acumatica's user interface enables users to design dashboards with little or no training to deliver real-time information for their needs. Users can also customize a "home" dashboard as well as a dashboard for each application workspace.

### ANALYTICAL REPORT MANAGER

Acumatica's Analytical Report Manager (ARM) improves performance with easy maintenance for free-form report creation utilizing rows, columns, and units.

### MULTI-DIMENSIONAL REPORTING

Acumatica enables you to analyze data from multiple perspectives, using subaccounts with segmented keys to break down information into smaller facets.

### CREATE CUSTOM REPORTS

Acumatica lets users create custom reports without coding or IT support. You can generate custom reports and retrieve reports online to inform decisions. Create templates for commonly used report types.

### ROLE-BASED REPORTING

Acumatica can tailor reports to meet the information needs of all roles in your organization so sensitive information is only shared with the individuals who have appropriate access.

“Acumatica is easy-to-use and navigate, and I love the dashboards, which allow me to design reports with all my KPIs...With Acumatica, we can get information anytime we want it.”

## Branding

Customize reports with your branding and images, including full control over fonts and placement of information.

## Templates

Easily create report templates by saving report parameters as a template and populating reports with the template's parameters.

## Ad Hoc Filters

Apply ad hoc filters to entry forms and report forms to display only the data you need at that moment.

## Multi-Dimensional Reporting

Use subaccounts with segmented keys to break-down information into smaller facets to view items by price, color, size, store location, or any number of dimensions that you select.

## Business Report Designer

Create visually-compelling reports, including sales reports, check forms, invoices, and more. Easily design new reports or customize predefined reports with Acumatica Business Reports Designer.

## Combined Reports

Create multiple reports and merge them into a single package before sending them as an HTML or PDF file.

## Scheduled Reports

Schedule report generation with delivery email delivery options.

## Signed PDF Documents

Generate signed PDF documents via the report engine.

## Create Reports and Dashboards from Generic Inquiries

Use Generic Inquiries to access data contained in Acumatica and make it available for reports, dashboards, Excel files, or OData.

## Secure Data Access

Reports, Generic Inquiries, and Dashboards incorporate defined user security policies to protect access to sensitive data.

## Pivot Tables

Create multiple pivot tables for each Generic Inquiry. You can use pivot tables to reorganize and summarize data in a Generic Inquiry and view it from different perspectives.

## Microsoft Excel Export

Export a Generic Inquiry to MS Excel and place parameters on a separate Excel sheet. The result is an Excel file with a data sheet containing the Generic Inquiry data and a parameters sheet containing the parameters used prior to export.

## Reusable Filters

Leverage reusable filters to create and apply complex filters and save them for future use.

## Flexible Viewing

Toggle between parameters and views without losing changes made on the parameters view.

## Generic Inquiry Side Panels

Add a side panel to Generic Inquiries to show the details of specific records in an inquiry all on the same screen. Side panels can be resized, maximized, or minimized.

## Email from Generic Inquiries

Easily send targeted communication to customers, vendors, prospects, employees, or other contacts through filtered Generic Inquiry results.

## Financial Reporting

Use the Analytical Report Manager to build analytical reports that retrieve amounts posted to particular general ledger accounts and subaccounts. You can configure reports to display data for a company, company group, or branches of a company. Specify multiple, non-continuous ranges in the data source for accounts, subaccounts, and branches in the general ledger engine.

## Display Totals

Request Generic Inquiries display total values, including average, max, min, and sum.

## Microsoft Power BI

Leverage Acumatica's integrated business intelligence tools, such as Microsoft Power BI, to aggregate data from multiple sources, extract actionable information for strategic and tactical decision-making, and present it visually to stakeholders.

## Interactive, Real-Time Dashboards

Use role-based dashboards to visualize data from multiple sources. Dashboard content is dynamically generated for real-time results with drilldowns to view detailed transactions.

## Mobile Access

Conveniently access dashboards, reports, and Generic Inquiries from secure mobile devices.

## Business Events

Use business events to trigger email alerts, SMS text notifications, or tasks when conditions occur in the database that require user intervention or to keep teammates updated.



## About Milestone Information Solutions

Milestone IS has been helping companies implement enterprise resource planning (ERP) systems to improve business processes and profitability for over 30 years. By combining our unique accounting expertise, dedication to customized support, and attention to detail, we are able to help businesses maximize their ERP systems and get the most out of their investments.

To learn more about how Milestone and Acumatica can streamline your business, visit [www.milestoneis.com](http://www.milestoneis.com).