



FEATURE SHEET

Workbooks

Benefit from the familiar functionality of Excel and the advanced reporting and analytics from Nectari.

With Nectari Workbooks, you get:

- Easy access to your data
- Next-level ad hoc reporting
- Flexible formatting options
- Assistance from our built-in AI Copilot

View your workbooks wherever you go.

Access your workbooks on any device without opening a second application and do all your analysis and reporting in one place—Nectari. To view your data even faster, you can embed your workbooks into Acumatica and any application where you can embed a link.

YOUR WORKSHEETS ON THE WEB

	Month to Date			Year to Date		
	Actual	Budget	%	Actual	Budget	%
Revenue						
Sales Revenue	6,889,331.49	3,837,809.49	180%	33,629,380.21	18,847,156.35	178%
Sales - Freight	10.00	10.50	95%	50.00	52.50	95%
Total Sales Revenue	6,889,341.49	3,837,819.99	180%	33,629,430.21	18,847,208.85	178%
Other Revenue						
Other Income	25,090.03	24,538.21	102%	114,578.39	113,020.18	101%
Total Other Revenue	25,090.03	24,538.21	102%	114,578.39	113,020.18	101%
Total Revenue	6,914,431.52	3,862,358.20	179%	33,744,008.60	18,960,229.03	178%
Cost of Revenue						
COGS - Inventory	3,990,457.24	2,261,670.25	176%	19,749,612.16	(11,121,907.31)	-178%



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Let the Wizards show you the way.

Empower your team to build reports in a familiar environment that doesn't require technical or Excel expertise. Access existing pre-configured reports or create your own using the Wizards and Nectari AI Copilot for guidance. You can also import existing Excel files and build from there.



Data Extraction Wizard: Build your data extraction by selecting your fields, environment and data model. Sort and aggregate your data to determine how it will appear and apply formatting to customize the look of your extraction.



Formula Wizard: Generate formulas that filter your data to get as granular as you like. Add multiple grouped filters and connect them with "AND" and "OR" conditions to build complex formulas that calculate things like 12-month rolling.



Pivot Wizard: Streamline your data analysis using pivots to slice and dice large data sets. The Pivot Wizard is perfect for sales and inventory analysis.



Drill Down Wizard: Dig into the details and view all the results on the same page without flipping between sheets. Create drill-down profiles to easily access results and eliminate making the same drill-down selections any time you open your workbook.



Nectari AI Copilot: Summarize reports, explain formulas, and keep insights dynamically up to date as your data changes.

BUILD DYNAMIC DASHBOARDS



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Acumatica
The Cloud ERP