



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
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- Schedule a Personalized Demo
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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.”

—Ka Ma Chan, Chief Financial Officer, Key Code Media

> CUSTOMER STORIES

Branding

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

Flexible Reports and Templates

Easily create a new report from scratch or from existing reports and save report parameters as templates. Utilize preconfigured report parameters for rapid reporting.

Ad Hoc Filters

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

Flexible Viewing

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

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.

Aggregate Strings and Report

Retrieve the values of individual records that comprise aggregated data field and concatenate them into a single string for enhanced readability.

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 Acumatica data and make it available for reports, dashboards, Excel files, or OData. Utilize the rich text box field that highlights syntax errors, real-time entity validation, auto-completion, and formula infotips for fast, accurate query creation.

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. Use pivot tables to reorganize and summarize inquiry data and view it from different perspectives, enhancing your ability to make informed business decisions. Easily toggle between table and pivot views and share them across your teams.

Mobile Access

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

Color Coded Record Statuses

At-a-glance color-coded statuses provide immediate visibility into the status of a record such as Blue for Open and New records, Orange for records on Hold or Reserved, Red for Overdue, Expired, Rejected, and Pending Approval statuses, and more.

Reusable Filters

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

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.

Business Events

Enhance transparency with event-triggered notifications like email alerts, SMS, or tasks requiring action. Notify teammates and previous owners, preview and edit event-generated emails, manage recipients, modify content, attach files, and streamline communication for improved collaboration and efficiency.

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.

ABOUT ACUMATICA

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information on Acumatica, visit www.acumatica.com or follow us on [LinkedIn](#).