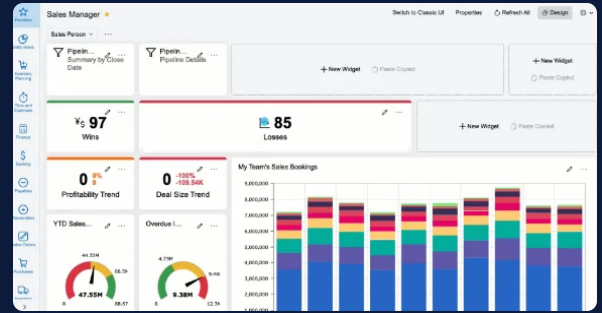


Analytics and Reporting

Gain greater insight 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.



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 that controls access to sensitive information. Optimized Generic Inquiries keep dashboards and pivot views loading fast.

Users design dashboards with little or no training, including a home dashboard and one for each workspace. They can also ask AI Assistant complex questions, including how balances changed across prior periods and which transactions sit behind the numbers, and add the resulting chart or table to a dashboard as a reusable widget.

The Analytical Report Manager (ARM) simplifies free-form financial report creation using rows, columns, and units. Multi-dimensional reporting uses subaccounts with segmented keys to break information into smaller facets, so you can analyze data from multiple perspectives.

Users create custom reports without coding or IT support. Role-based reporting shares sensitive information only with those who have appropriate access, and DAC-level data security lets business users build their own Generic Inquiries using only authorized data.

Key business benefits

Visualize data with tables, charts, and graphics, including AI Assistant answers.

Gain insights with fast-loading live dashboards.

Drill down to detailed transactions and track KPIs against configurable goals.

Share reports as HTML, PDF, Excel, Word, or signed PDF, with scheduled email delivery.

Related resources

Foster Profitability with KPIs

[LEARN MORE →](#)

Reporting and Analytics Video

[LEARN MORE →](#)

Schedule a Personalized Demo

[LEARN MORE →](#)

“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](#)

Capabilities

Tools to build, secure, share, and act on your business data.

Interactive, real-time dashboards

Use role-based dashboards to visualize data from multiple sources, with drilldowns to detailed transactions. Ask AI Assistant a business question and add the resulting chart or table to an editable dashboard as a reusable widget.

AI Assistant for financial analysis

Ask questions that would otherwise take multiple reports. AI Assistant analyzes document history to explain prior-period and point-in-time balances, identify trends, and surface the transactions behind the numbers, answering in text, charts, or tables.

Reports and dashboards from Generic Inquiries

Make Acumatica data available for reports, dashboards, Excel, or OData, with syntax highlighting, real-time validation, and auto-completion for accurate queries. Store results of large or frequently used inquiries, refreshed on a schedule or on demand, so they load instantly and can be reused across dashboards, OData, MCP, and pivot views.

Pivot tables and grouped table views

Create multiple pivot tables per Generic Inquiry to summarize data from different perspectives. Grouped Table views organize results into expandable hierarchies with subtotals, totals, and calculated values, without rebuilding the inquiry in Report Designer.

Secure data access

Reports, Generic Inquiries, and dashboards honor defined user security policies. DAC-level data security uses existing screen permissions to limit the data business users can reach when building their own inquiries.

Business intelligence and AI tools

Connect Microsoft Power BI to aggregate data from multiple sources and present it to stakeholders. Expose published Generic Inquiries through MCP servers so assistants like Claude or ChatGPT can answer questions from read-only ERP data under each user's access rights.

Financial reporting

Build ARM reports from general ledger accounts and subaccounts for a company, company group, or branch, with multiple non-continuous ranges. Export ARM data to Excel to edit parameters and refresh data while maintaining audit trails.

Business Report Designer

Design sales reports, check forms, invoices, and more, or customize predefined reports. Apply your branding and images with full control over fonts and placement.

Flexible reports and templates

Create reports from scratch or from existing reports, save parameters as templates, and toggle between parameters and views without losing changes.

Ad hoc and reusable filters

Apply ad hoc filters to entry and report forms to show only the data you need, and save complex filters for future use.

Scheduled reports and signed PDFs

Schedule report generation with email delivery, and generate signed PDF documents through the report engine.

Generic Inquiry side panels and totals

View record details in a resizable side panel on the same screen, display average, max, min, and sum totals, and concatenate aggregated values into a single readable string.

Business events and email

Trigger email, SMS, or task notifications from business events, and send targeted communication to customers, vendors, or employees from filtered Generic Inquiry results.

Mobile access

Access dashboards, reports, and Generic Inquiries from secure mobile devices.

Color-coded record statuses

See status at a glance: blue for open and new, orange for on hold, and red for overdue, expired, or rejected records.

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](#).