



ATLAS FOR DYNAMICS 365 FOR FINANCE AND OPERATIONS

COMBINE THE FAMILIARITY OF MICROSOFT EXCEL
WITH THE POWER OF YOUR MICROSOFT DYNAMICS 365 DATA

Do you need an easy way to create financial and operational reports? Do you need to combine data from different Microsoft Dynamics 365 for Finance and Operations business entities to answer critical business questions? Do you need to access real-time data in Excel and drill down to see what's driving variances? If so, Atlas lets you mix and match data across business entities and even other sources so you can create custom reports within Excel, without waiting for IT.



Empower business users to create new reports fast



Drill anywhere to answer urgent business



Combine data across entities and sources to see the big picture



Automate repetitive tasks to maximize productivity



Boost performance with local caches and incremental refreshes

TACKLE ALL YOUR FINANCE AND OPERATIONS REPORTING NEEDS

Atlas is your one-stop shop satisfying all your Finance and Operations reporting needs. Report over real-time data from any module, drill into the detail, upload changes to journals and master tables, automate repetitive tasks, and even simplify data access for Power BI—all from within Excel or another Office application.

Empower business users to create new reports fast

- › Access real-time Finance and Operations data in the familiar Excel environment. Create a custom report in minutes working with over 45 new transactional entities to answer pressing business questions, without having to customize your ERP.

Drill anywhere to answer urgent business questions

- › Drill into balances, journals, and sub-ledgers from within Excel to answer follow-up questions and to find and fix issues fast. This enables you to explore data outside your initial query without switching to another report.

Combine data across entities and sources to see the big picture

- › Answer your most challenging questions by easily combining data across Finance and Operations entities and other sources in a single report, without needing help from IT.

Automate repetitive tasks to maximize productivity

- › Maximize your productivity by automating repetitive reporting and data upload tasks and scheduling them to run overnight or at quieter times. Use automation to distribute reports to non-Atlas users by email or to publish data to Power BI for faster visualizations.

Boost performance with local caches and incremental refreshes

- › Enjoy fast response times by storing data in local caches and refreshing them incrementally. This results in faster interaction with reports and less data transferred across the network.

- › Balance Sheets
- › Income Statements
- › Sales Reporting
- › Budget Forecasting
- › Customer Open Order
- › Equal Employment Opportunity Reporting
- › Project Management Reporting
- › Purchase Order Tracking
- › Business KPI
- › Role-Specific Dashboards
- › And More



About insightsoftware

insightsoftware's financial reporting solutions are easy to install, use, analyze, and trust. With real-time integration to over 130 ERPs and EPMs, our solutions automate and accelerate financial and operational reporting processes, leaving you more time to focus on analysis and effective business decisions. With the industry's highest customer satisfaction rate, 94 percent customer retention, and 20,000+ customers worldwide, insightsoftware is the proven choice for all your reporting needs. Visit insightsoftware.com and discover how easy it is to make business sense of your data.

Microsoft Partner
Gold Application Development

"With Atlas, we were able to build reports in-house that would have cost us thousands of dollars in consulting. Even when our partner told us they could not create the report in Dynamics 365 [for Finance and Operations], we were still able to build it with Atlas."

– Robert Funke
IT Director, ELITE Comfort Solutions