



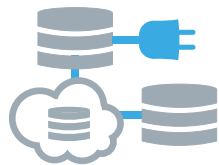
COMBINE THE FAMILIARITY OF MICROSOFT® EXCEL WITH THE POWER OF YOUR MICROSOFT DYNAMICS 365



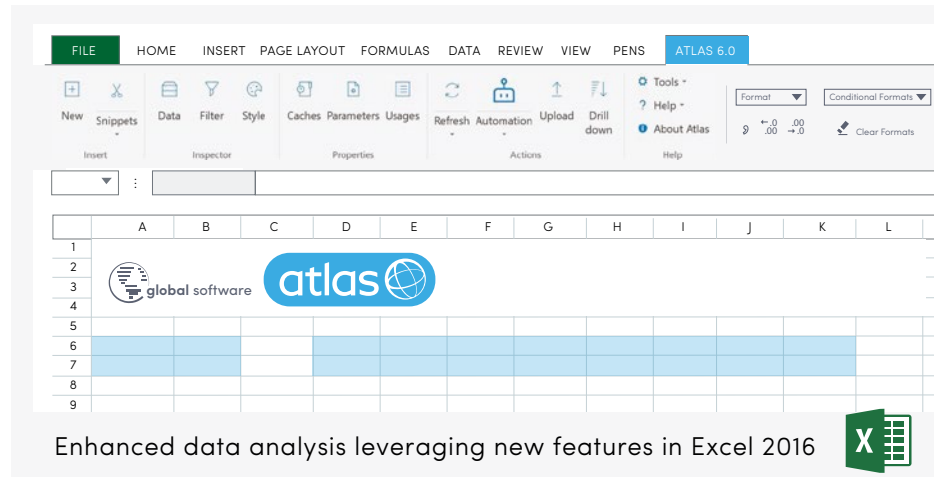
Transform your business by providing live data from Microsoft® Dynamics 365 into Excel

SECURELY MIX & BLEND LIVE DATA

Connect to cloud or on premise data sources from multiple locations with integrated Dynamics 365 security across a variety of business systems



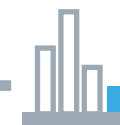
Eliminate errors caused by downloading or manually re-keying data



Boost data analysis with sidebar drill-down and transaction drill features



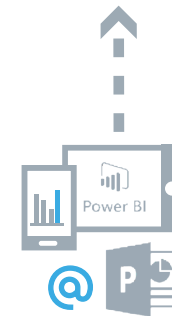
Import updated journals, timesheets, budgets, forecasts, etc. into Dynamics 365



Present data through a variety of dashboards and visualization canvasses

GENERATE ANY REPORT

Atlas has the ability to dynamically access any module in Microsoft Dynamics 365: Operations, Financials, Sales, Customer Service, Field Service and many more...



Publish to Office 365: PowerPoint, Outlook & Power BI mobile devices

BENEFITS:

- No IT or super-users required to create/change reports
- Deployment in minutes
- Out-of-the-box integration between your Dynamics 365 and Microsoft Office 365 is easy and logical
- Ability to update data in Excel and upload to your enterprise system
- No staging area or data warehouse required
- Great ROI by keeping additional licensing costs to a minimum and maximizing your investment in the Microsoft Office system

Microsoft Partner
Gold Application Development

BALANCE SHEETS
INCOME STATEMENT
SALES REPORTING
BUDGET FORECASTING
CUSTOMER OPEN ORDER
EQUAL EMPLOYMENT
OPPORTUNITY REPORTING
PROJECT MANAGEMENT
REPORTING
PURCHASE ORDER
TRACKING
BUSINESS KPI
ROLE-SPECIFIC
DASHBOARDS
... AND MORE

ANY DATA

Atlas allows you to bring together data from a number of enterprise data sources into one report.

EASY UPDATES & UPLOADS

With Atlas, work with live ERP data directly in Excel. View changes as soon as you write the data back to the host system.

COMPLEMENT POWER BI

Within minutes Atlas brings together information from your enterprise system portfolio into a format suitable for use in Power BI. Atlas and Power BI allow you to synthesize, visualize and publicize all your business information sources easily.



atlas 
50,000+ users in counting...

SCHEDULE AND DELIVER

Schedule an automated refresh of reports, or refresh on the fly. Save each report where you would like, including OneDrive, and view it in customizable Power BI dashboards.

SNIPPET!

Save time in Atlas by saving frequently used report definitions into snippets and reuse them as templates in future reports. Snippets can be organized into libraries and shared among team members to boost productivity.

TIGHT SECURITY

When using Atlas for Dynamics 365, your data stays secure. Microsoft's Common Data Model encrypts information at rest, and keeps the same permissions and controls intact for any data you access within Atlas.

DRILL-DOWN TO THE DETAILS

It has never been easier to get the answers behind every number in each report. The Atlas Sidebar can be used to drill-down to the details in reports and then convert them into easy-to-understand visualizations, making it ideal for presentations.

atlas for Microsoft Dynamics 365™

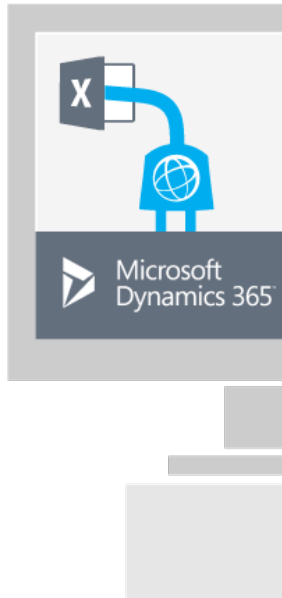
Alex
the Report Master



[Atlas for Microsoft Dynamics 365](#)

Transform your business with Atlas and Microsoft Dynamics 365

Atlas for Microsoft Dynamics 365 allows users to create powerful reports with drill-down in Excel using live ERP data. Atlas provides one platform to consolidate data from key business systems into a single report, eliminating the need for manual re-keying or downloading of data into Excel. Users can seamlessly access Microsoft Dynamics data in the cloud or on-premise. Take advantage of integration features that enable you to design, build, and share real-time reporting in Excel spreadsheets, and visualize the data using Power BI or customizable Atlas dashboards.

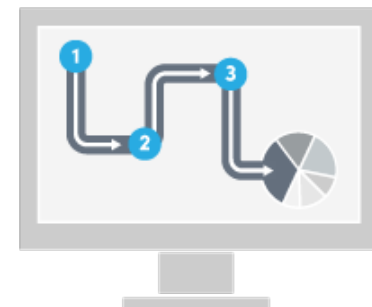


Up-to-the-minute Reporting Data from Microsoft Dynamics 365 in Excel Boost your reporting structure with Atlas:

- Eliminate manual processes - Say goodbye to re-keying data. With Atlas, easily create dynamic reports from any Office app that can be refreshed on demand, or when the value in a linked cell is changed
- Report, change, and write-back with ease - Reports generated using Atlas can also include templates that enable you to easily upload data back into your ERP system. These templates can then be saved for later use.
- Seamlessly blend business data with your Office 365 Suite - Atlas is completely integrated with the Office 365 environment. Use Atlas to seamlessly insert live data from Microsoft Dynamics into financial reports, contracts, PowerPoint presentations, letters, emails, and more.
- Combine your reporting data like never before - Have data in multiple locations? Atlas allows you to bring together data from a number of enterprise data sources into a single report.
- Refresh each report on demand - Refresh one or more Atlas workbooks in the background and continue using Excel without interruptions.
- Drill down to the details - The Atlas Sidebar provides an experience that's sophisticated, not complicated. The Sidebar allows you to tailor reports to meet the needs of any project, and drill down to the fine-tuned details. Choose between a sidebar or a full visualization canvas to display more detailed figures behind what you see.
- Save more time with snippets - Frequently used report definitions can be saved as snippets and reused later. Then, boost productivity by saving these templates into libraries that can be shared with other team members.
- Access your data anytime, anywhere - Publish your existing Atlas reports to Office 365, OneDrive, and Power BI so that you can get the information you need, anytime, from anywhere.

Organize a workflow

Prioritize tasks and form a batch, and execute templates in the order specified. You can use this feature to automate dependent workflows without changing permissions already set by the host system.





Leverage powerful journal features

Atlas provides a journal feature to simplify interaction with your Dynamics 365 system. Journals are validated and inserted using the same mechanisms you'd use in 365 directly. Use the Atlas journal function to:

- Load opening balances, open sales and purchasing orders, and view asset balances
- Load budget transactions into a new model
- Load data from an external system and enter it in Microsoft Dynamics 365 for Operations

Stay secure

When using Atlas for Dynamics 365, your data stays secure. Microsoft's Common Data Model encrypts information at rest, and keeps the same permissions and controls intact for any data you access within Atlas.



Complement your Power BI Experience

Atlas streamlines your Power BI experience. It offers one toolset that controls all the parameters relating to your data and the way you would like it to be presented.

atlas for Microsoft Dynamics AX

Alex
the Report Master



[Atlas for Microsoft Dynamics AX](#)

Revolutionize the way you access your Dynamics AX data

Your data is the bedrock of your business, but spending time chasing it down to create reports shouldn't be. Atlas empowers users to build financial and operational reports with drill-down capability in Excel. With Atlas, easily consume, visualize and react to your data throughout Excel, Office 365, and Power BI, and save valuable time and resources by eliminating cumbersome re-keying or downloading of data into the spreadsheet.

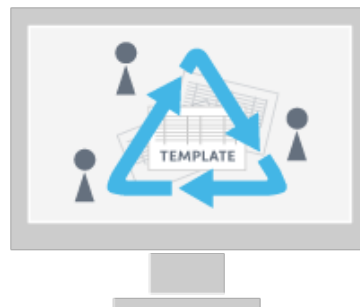


Pre-configured Microsoft Excel Add-in for financial and operational reporting across ERP platforms

- Easily create accurate reports in seconds
Say goodbye to re-keying data. With Atlas, easily create dynamic reports that can be refreshed on demand, or when the value in a linked cell is changed - regardless of data source.
- Do everything from one app
Report, change, upload. You can transform your business information by using Atlas that Combine reporting and upload features to close the feedback loop.
- Seamlessly blend business data with your Microsoft Office documents
Atlas is completely integrated with the Office environment. Use Atlas to insert live data from Microsoft Dynamics in every type of documents you are working on. Used in financial reporting, contracts, PowerPoint presentations, letters and emails.
- Mash up your report with merged data sources
Have data in multiple locations? Atlas allows you to bring together data from a number of enterprise data sources into a single report.
- Up-to-the-second data
Refresh one or more Atlas workbooks in the background and continue using Excel without interruptions.
- Access your data anytime, anywhere
Publish your existing Atlas reports to Office 365, OneDrive, and Power BI so that you can get the information you need, anytime, anywhere.

Make better decisions in less time using the Atlas Sidebar

The Atlas Sidebar provides an experience that's sophisticated, not complicated. The Sidebar allows you to tailor reports to meet the needs of any project, and drill down to the fine-tuned details. Choose between a sidebar or a full visualization canvas to express the detailed figures behind what you see.

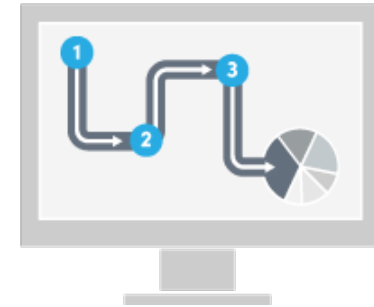


Save templates, save time

Frequently used report definitions can be saved as templates and reused later. Then, boost productivity by saving these snippet templates into libraries that can be shared with other team members.

Organize a workflow

Prioritize tasks and form a batch, and execute templates in the order specified. You can use this feature to automate dependent workflows without changing permissions already set by the host system.



Leverage powerful journal features

Atlas provides a journal feature to simplify interaction with your Microsoft Dynamics system. Journals are validated and inserted using the same mechanisms you'd use in AX directly. As with table upload, a template describes the entities involved with the transactions and these can be included in batches to automate particular activities. Use the Atlas journal function to:

- Load opening balances, open sales and purchasing orders, and view asset balances
- Load budget transactions into a new model
- Load data from an external system and enter it in Microsoft Dynamics AX
- Use with other Atlas functions to generate cross-tabular reports

Complement your Power BI Experience

Seamlessly connect Atlas with Power BI to streamline your experience with both. Atlas features a dedicated Power BI dashboard that can display data across various systems, giving users a consolidated interface without juggling multiple reports. From there, easily visualize your reports, and gain the flexibility to import the fields you need.





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