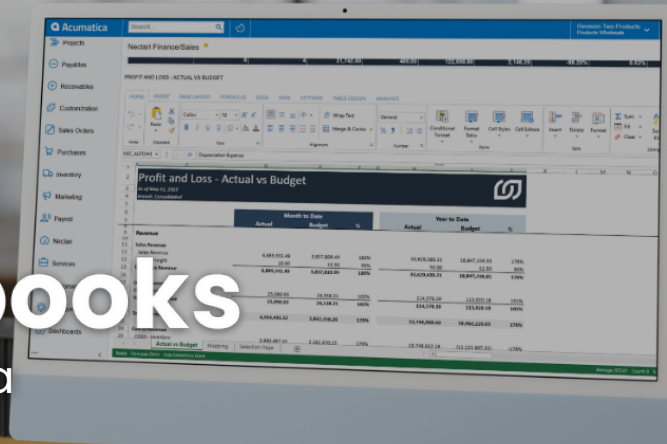




FEATURE SHEET

Workbooks

For Acumatica



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

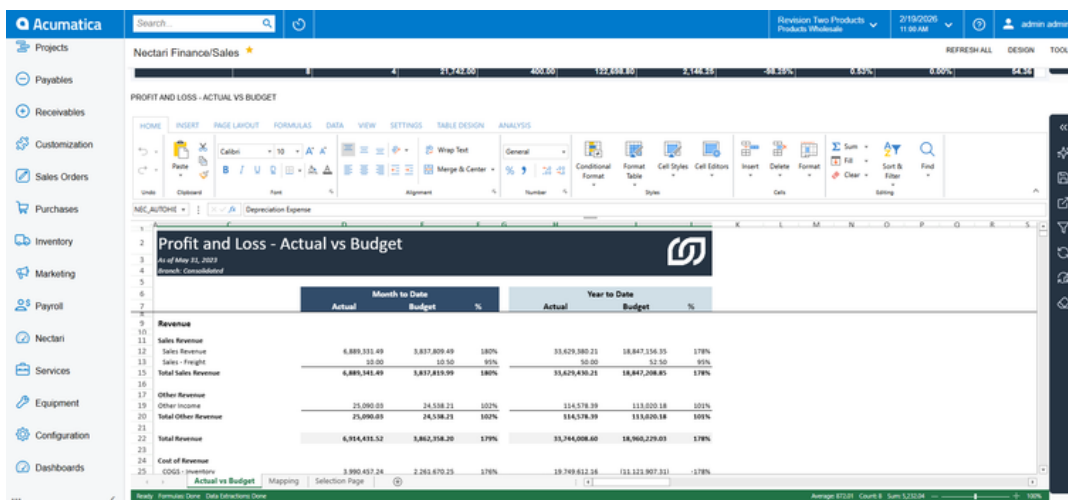
With Nectari Workbooks, you get:

- Easy access to your data
- Next-level ad hoc reporting
- Flexible formatting options
- Assistance from our built-in Nectari 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 WORKBOOKS ON THE WEB



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



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and Nectari AI Copilot for guidance. You can also import existing Excel files and build from there.



Data Extraction Wizard: Extract the data you need by selecting your environment, data model and fields. Sort, aggregate, and format the data as required to create a report that meets your needs. Keep reports clear and focused by hiding zero-value rows and columns when needed.



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.

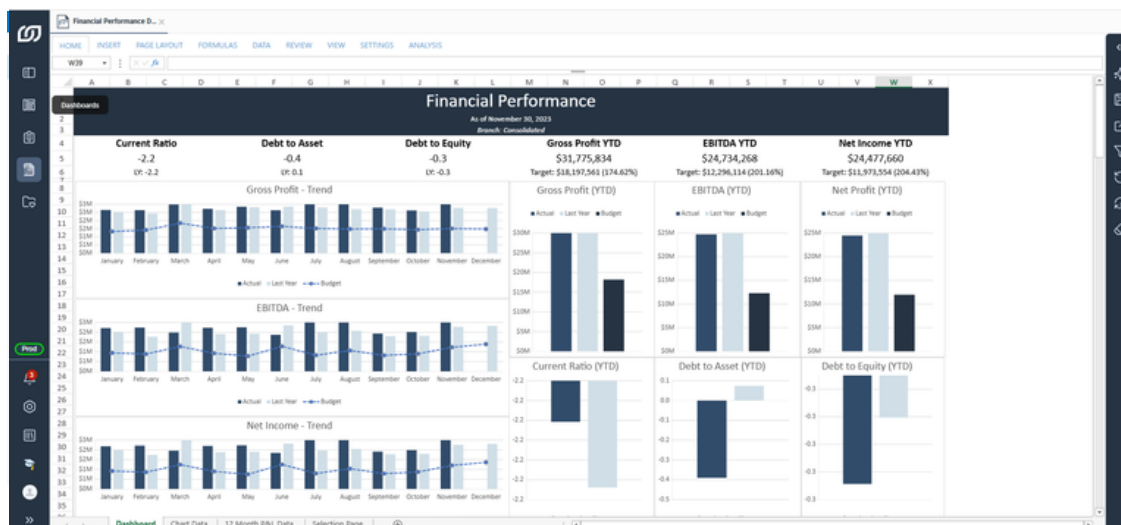


Write-Back Wizard: Streamline planning and data entry by allowing users to create new records and update existing information directly from Workbook. When needed, leverage Data Extraction and Formula Wizard to gather and prepare the data required before writing it back to Acumatica.



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

BUILD DYNAMIC DASHBOARDS USING THE WORKBOOKS



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