

End-to-End Reporting, Consolidation, and Planning Solutions Tailored for Dynamics 365

1-click integration to Dynamics 365 automatically consolidates CRM, ERP, HCM, and Finance data into a smart data warehouse.

Microsoft Dynamics 365 brings together CRM, ERP, AI, and productivity applications in the cloud. It is a business management powerhouse for midsize and large organizations, helping them consolidate financial and operational systems on a single platform and dissolve the information barrier between major departments. Strategic business planning, forecasting, and budgeting, however, often remain a manual chore that requires teams to work across hundreds of spreadsheets, slowing the business down at exactly the moment speed matters most.

This is where Acterys closes the reporting, planning, and analytics gap. Acterys is an integrated performance management platform that delivers professional financial reporting, planning, and consolidation for Microsoft Dynamics-powered organizations, with native integration across Power BI, Excel, and Microsoft Fabric.

The Acterys App for Dynamics 365 provides extended planning and analytics (xP&A) functionality to analyze what's happening today, plan for tomorrow, and prepare for what's next. Use comprehensive reporting and forecasting features to analyze data and metrics from CRM, ERP, Finance, HCM, and other key modules. With built-in analytics, identify the right opportunities to act on and protect profitability with every business move.

Acterys for Dynamics 365: Key Benefits

Instant Connectivity

1-click integration to Dynamics 365 automatically consolidates CRM, ERP, HCM, and Finance data into a smart data warehouse.

Consolidated Business Insights

Get a holistic picture of your business performance by adding multiple Dynamics 365 datasets and other sources.

Automated Workflows

Get automated workflows for Dynamics 365 reporting and schedule tasks for approval, budgeting, report distribution, and more.

xP&A Ready

Take action on your Dynamics 365 data using the Acterys visual planning and simulation features. Enter top-down and bottom-up assumptions to visualize business impacts immediately.

Security & Governance

Trust Microsoft technology-based security and get comprehensive governance, user rights, and audit trails, so you can plan with confidence.

Reporting & Analysis at Speed

Instantly view your Dynamics 365 data populated in best-practice reports, interactive dashboards, and data entry forms.

Dynamics 365 Reporting & Planning at Speed

Complete Control

Get organizational performance at your fingertips using interactive management dashboards and reports inside Power BI or Excel.

Single Source of Truth

Zoom into transaction-level insights or zoom out to view summaries from a consolidated dashboard in seconds.

Customize on the Fly

Automatically see reports and dashboards built on your pre-populated Dynamics 365 data. Customize and extend any report using Power BI or Excel.

Best-in-Class Templates

Use customer-tested templates. Pre-built reports for legal consolidation, cash flow budgeting, and forecasting help you analyze business performance faster.

End the Spreadsheet Chaos

Stop importing and maintaining hundreds of spreadsheets that fly ungoverned across your teams. The live data model link ensures your Dynamics 365 reports update automatically when changes are pushed to Acterys.

What Customers Say

The ability of Acterys to be customized to fit your company's planning process is very powerful. Its data storage resides on an SQL DB, but end users view and edit their budgets from within Power BI and Excel. We are solving budgeting, forecasting, and planning processes by allowing users to view and edit their budgets within Power BI and Excel.

— Head of FP&A

We really liked the fact that Acterys is a true cloud CPM solution that leverages Power BI. The writeback from Power BI is pretty good. The Acterys team is super reactive to feature requests or questions we may have. The main benefit is the simplicity of putting together a planning and budgeting solution compared to other CPM vendors we have evaluated.

— Chief Financial Officer

What Is Acterys?

Acterys is an Extended Planning & Analytics (xP&A) platform that lets users work inside Microsoft Fabric, Power BI, and Excel. With its planning and analytics capabilities, Acterys gives organizations an agile, secure solution to improve efficiency and reporting flexibility for smarter, timely decision-making.

Get Your Acterys App for Dynamics 365

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