# Halo

Advanced Analytics for Microsoft Dynamics AX/D365
Turn your AX/D365 reports into a complete BI platform

Halo provides your entire organization with a powerful business intelligence platform for use with Dynamics AX/D365. With our powerful ETL and data warehousing engine and browser based GUI, Halo empowers business users to make fast, informed decisions that benefit everyone in your organization from the C-suite down. With pre-built packages for Sales, Financials (GL, AP & fixed assets), Manufacturing, and Inventory Analysis you can get up and running in just a couple of weeks.

A Complete Platform That Adds Depth and Speed to Dynamics AX/D365
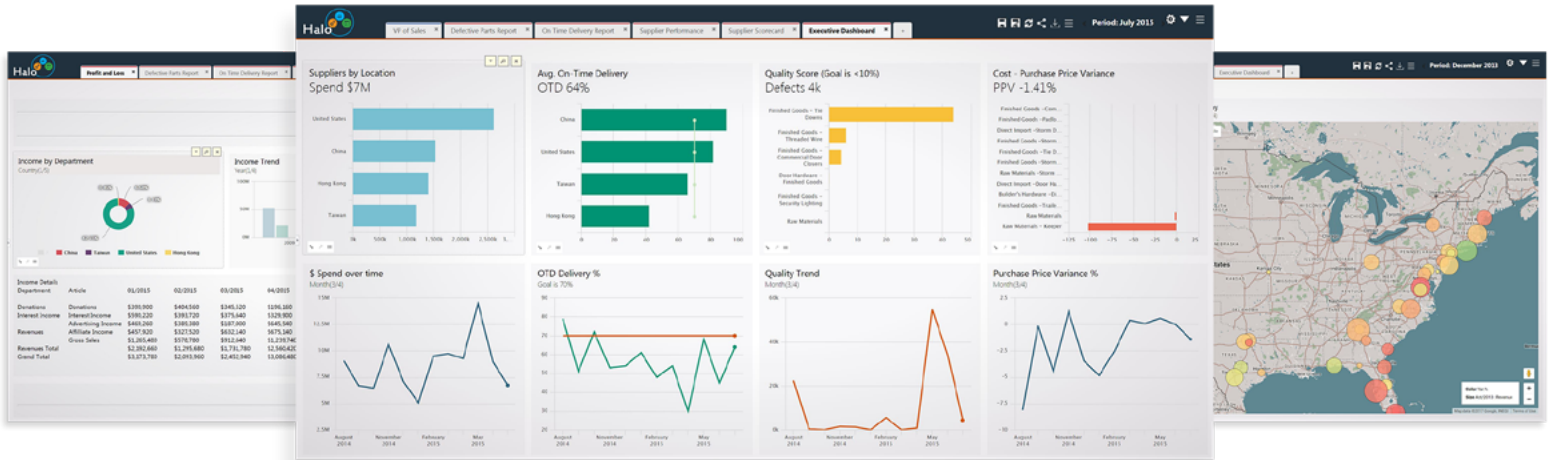
Financials - GL, AR, AP, Fixed Assets

• Improve planning and budgeting to increase revenue
• Generate alerts to stay up-to-date and reduce your DSO (daily sales outstanding)

Sales & Revenue

• In-depth, self-service analysis and reporting for sales pipelines that help increase revenue
• Improved decisions from a full spectrum view of the business help to increase margins

Inventory

• Full visibility into inventory levels reduces waste and margin leak
• Integrated collaboration increases productivity and improves decision making

Manufacturing

• Compare overall plant performance to improve efficiency
• Improved forecasting reduces your revenue loss

Halo's Microsoft Dynamics AX/D365 connectors contain fully configured and self-documented Extract, Transform and Load (ETL) processes, Analysis Services cubes, and analytics via our data visualization component. Our ETL process handles all the "heavy lifting" for Dynamics AX complexities that you would expect. In addition, Halo's built-in data quality components ensures the data you use for reporting and analysis and up-to-date. Halo also provides the ability to securely collaborate with internal employees as well as your entire extended enterprise - customers, vendors, suppliers and partners - so you're all working from the same page to make faster, more effective business decisions.

Sales/Revenue Deliverables
See what, when, and where your customers buy
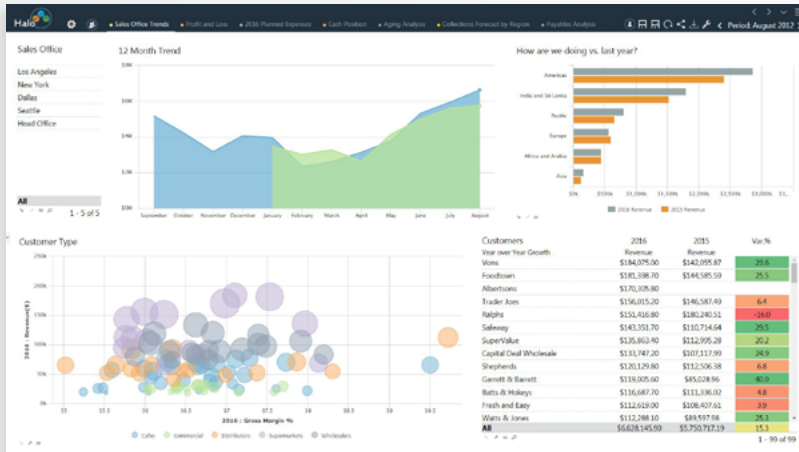
Customer Insights and Analysis: Discounts, Margins, Purchase History

Sales Rep Performance: Territories, Commissions, Actual vs. Budget

Product Trends: Pricing and Cost Trends by Product Groups and SKU

Customer Analysis

Gross Revenue and Net Sales by Period, MTD, QTD, YTD
Year over Year Analysis -Net Sales Variance and Variance %
Top 20 Customers, Current Year to Last Year
Margin and Margin %
% of Total Revenue vs. Margin
Sales Discounts and Commissions
Open Orders
Cross Sell Analysis of Products
Customer Analytics by Geography, Customer Dimensions, Customer Group, Customer Segments

Product Analysis

Pricing and Cost Trends by Product Groups and SKU
Top xx Products by Revenue and Margin
Slow moving product
Sales Discounts, Commissions and Taxes
Open Order Quantity
Product Sales Trends over Time
% of Total Contribution to Gross Revenue, Net Sales, Margin, and Margin %
Product COGS Analytics
Product Analytics by Item Groups, Item Dimensions, Primary Vendors, Production Groups, Production Pools

Drill Through Capabilities

Drill to transaction level detail for revenue, including all product details, customer details, sales order numbers, invoice numbers, and other transaction information

Overall Company Analysis

Gross Revenue, Net Sales and Margin, Year over Year, Variance and Variance % to Prior Years, To Budget and Forecast
End of Year Sales Projections
Sales and Margin Trends by Company

Sales Rep Analysis

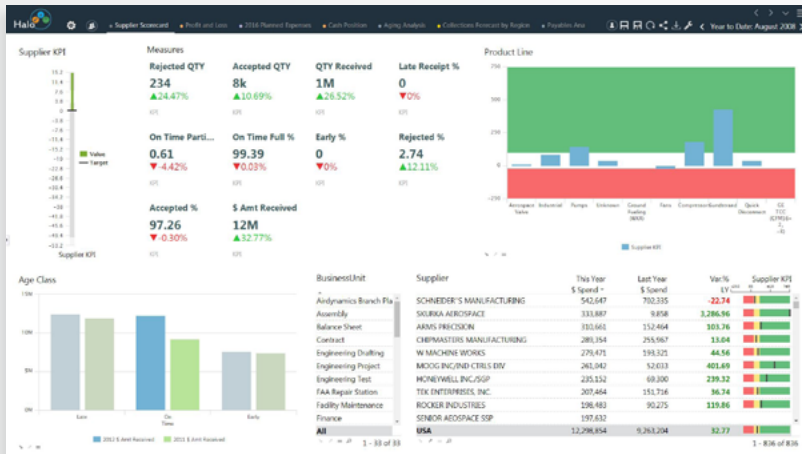| |
|---|
| Top Sales Reps by Revenue and Margin YTD, QTD, Month, Year |
| % of Total Sales Rep Contribution to Gross Revenue, Net Sales, Margin, and Margin % |
| Sales Discounts Given by Customer and Product |
| Sales Discount Trends by Sales Rep |
| Commissions by Customer and Product |
| Product Sales Analysis |
| COGS |

AX Supplier Scorecard Deliverables
See your supplier's and buyer's performance

Improve your Supply Chain Management & Make Better Decisions at Each Stage of the Order Lifecycle

Deliver Quality Products, On Time by leveraging Inventory, Order Status and Product Fulfillment Data

Vendor Analytics

Vendor Purchasing Trends in Quantity and Cost, Year over Year
Variance between Average Actual Product Cost and Average Standard Cost
Actual to Standard Cost Trends by Vendor and Item
On Time Delivery Metrics by Vendor/Item/Location
Number/Percent of Shipments Delivered On-Time vs. Late vs. Early
Vendor On-Time Delivery Trends over Time
Promised Date vs. Received Date Variance Analysis
Days Late/Early
Ship Complete Metrics
Number/Percent of Shipments Delivered Complete and/or Accepted vs. Rejected
Vendor Ship Complete Trends over Time
Supplier Scorecard Dashboard Ranking Vendor Performance by On Time Delivery, Ship Complete, and Average to Standard Cost
Percent of Items by Vendor Over/Under Standard Cost
Vendor/Product Dashboard highlighting Best Vendor Pricing and Best Vendor Delivery Statistics by Item
Vendor Lead Time Comparisons by Item

Raw Material/Purchased Item Analytics

Item Purchasing Trends in Quantity and Cost, Year over Year
Item-Vendor Cost Analysis
Item Cost to Standard Cost Variance Percent
Item Cost Trends over Time
Item Lead Time & Aging Analysis

Location Analytics

| |
|---|
| Vendor Delivery Statistics and Comparisons Across Company Locations |
| Item Lead Time by Vendor/Item/Location |
| Item Accepted/Rejected Statistics by Location |
| Cost Analysis by Vendor/Item/Location |

Supplier Scorecard Drill Through Capabilities

Drill down to Vendor Details, Location Details, Item Details, Item Cost, Standard Cost, PO Date, Receipt Date, Promise Date, Aging Details, , Item Lead Time, Quantity Ordered, Quantity Received, Quantity Rejected, Quantity Accepted, Quantity Received on Time & Quantity Received Early/Late

Accounts Receivable Deliverables
See how customer risk and expenditures have changed over time
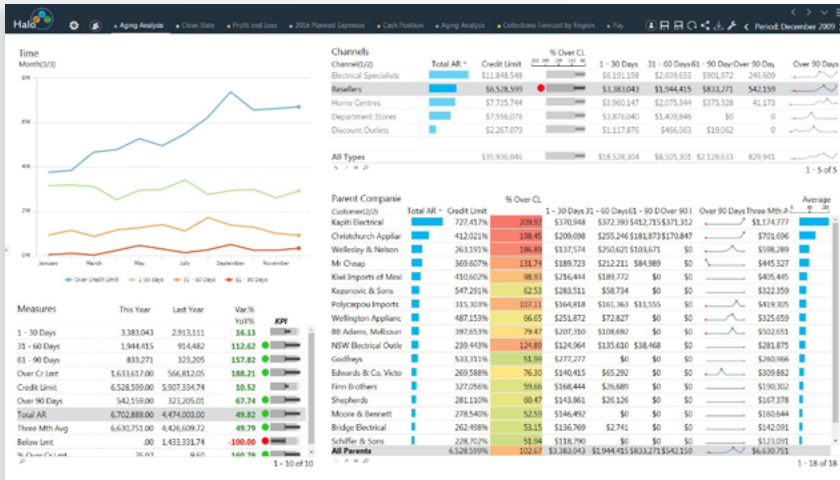
Enhance the Invoice to Collection Process

Optimize Collections' Return on Investment

Improve Accounts Receivable Recovery and Customer Retention

Overall Company AR Status
Aging Analysis (30,60,90 days)
Past Due Analysis
Collection Trends
Average Days to Pay
Average Days Open
Credit Limit and % Over Credit Limit

| Customer Receivable and Payment Analysis |
| --- |
| Customer Aging Analysis |
| Customer Average Days to Pay |
| Customer Average Days Open |
| Customer Payment Trends |
| Customer Payment Methods |
| Links to and from Customer Open Orders for credit extension and credit holds |
| Customer Analytics by Geography, Dimension, Group and Segment |

Other Analytical Features
Payments by Payment Method
Receivables by Due Date
Closed Receivables
Receivables by Transaction Date

Alerting features through Report Publisher
Receive alerts when customers have exceeded their credit limits or are past due

Drill Through Capabilities
Drill down to transaction level detail for customer transactions including all customer details, transaction type, transaction voucher ID's and transaction invoices

AX Accounts Payable Deliverables
Understand cash flow, trade credit and liabilities at a glance
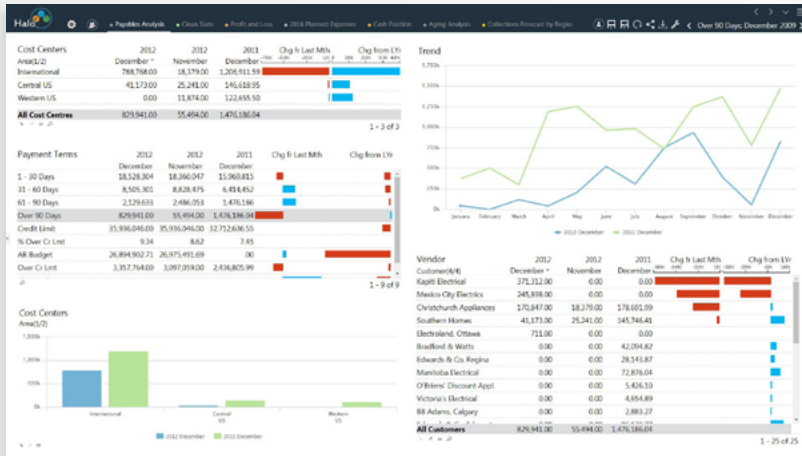
Better Gauge the Financial Health of your Organization

Take Effective Control of the Vendor Payment Systems by Enhancing Visibility and Control

Maintain Good Standings with your Business Network

Overall Company AP Status
Accounts Payable Status and Balances
Accounts Payable Aging
Open AP
Payment Trends and Status

Vendor AP Analysis
Payments Due to Suppliers and Vendors
Vendor Payment History and Trends
Vendor Aging Analysis
Vendor Payment Terms
Vendor Analytics by Department, Network, Channel and Vendor Group

Business Unit and Departmental AP Analysis
Payables by Business Unit and/or Department
Aging Analysis by Business Unit and/or Department
Days Sales Open (DSO)

Other Analytical Features
Payments by Payment Method
AP Trends by Due Date
AP Trends by Transaction Date
AP Trends By Close Date
AP Trends by Document Date

Alerting features through Report Publisher
Receive alerts when departments have exceeded spending credit limits or are past due on payments

Drill Through Capabilities
Drill down to transaction level detail for vendor transactions including all vendor details, dates, vouchers IDs and invoice data

AX Financials Deliverables
Monitor Company Performance from a General Ledger Perspective

Leverage Finance as a Catalyst for Driving Performance

Visualize Cost, Quality, and Timeliness Performance

Monitor the P&L, Balance Sheet and Cash Flow by Company, Department and/or Cost Center

Overall Enterprise Financials

Consolidated Income Statements

Consolidated Balance Sheets

Currency Conversions

Revenue Analysis

COGS Analysis

Expense Analysis

Asset and Liability Analysis

Actual vs. Budget and Forecast, MTD, YTD

Achievement Percent to Budget

End of Year Projections

Company and Business Unit Financials

Business Unit/Company Income Statements

Business Unit/Company Balance Sheets

Business Unit/Company P&L Analysis

Business Unit/Company Asset Analysis

Business Unit/Company Liability Analysis

Business Unit/Company Budgets and Forecasts MTD and YTD

Chart of Account Management

Allow financial analysts to build multiple hierarchical reporting structures though Halo Rays Hierarchy Builder

Departmental/Cost Center Financial Analysis

Expense Trends by Department and/or Cost Center

Expense Analysis, Year over Year, YTD, MTD, and to Budget

End of Year Projections for Expenses and Revenues

Budgeting & Planning Analysis

Workgroup data collection and data entry of Budgets and Forecasts

Pre-populate budget and forecast from historic data

Bottom-up, Top-down Data Entry into Cubes

Cube Data Entry by Value or %,equal allocation,equal increment,weighted allocation and weighted increment

What-if Analysis

Variance Analysis for Actual vs. Budgets vs. Forecasts

Budgeting and Forecasting Histories and Comparisons

Rolling Forecasts

Drill Through Capabilities

Drill to transaction GL transactions including all account details, dates, transaction information

AX Human Resources Deliverables
Make sense of payroll, timesheets, and hiring paperwork
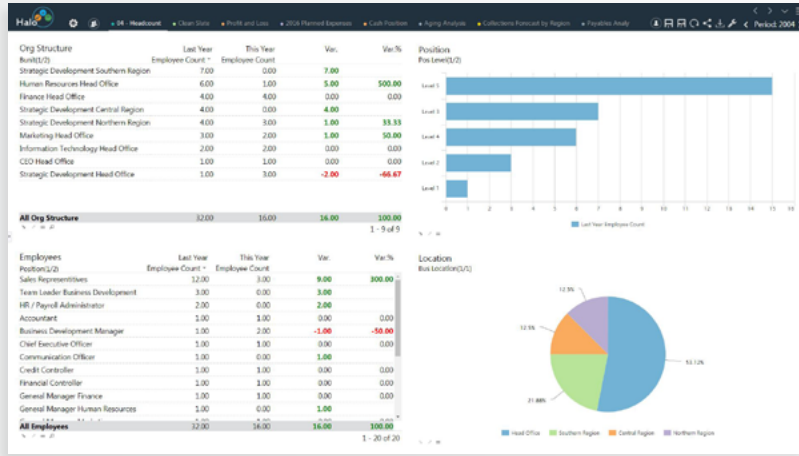
Get Immediate, Clear, and Controlled Visibility into the Info you Need Most

Track Employee Attrition, Turnover, Benefits and Salary in a Single View

Employee Analytics

EEOC-required reporting attributes

Number of Terminations and Ratios by Age Group, Gender, Ethnicity, and other Employee attributes

Number of New Hires and Ratios by Age Group, Gender, Ethnicity, etc

Employee Headcounts and Ratios by Compensation Range and Age Group, Gender, Ethnicity, etc

Employee Annual Compensation by Age Group, Gender and Ethnicity, etc

Average Years of Service by Age Group, Gender and Ethnicity, etc

Employee Trends over Time by Age Group, Gender and Ethnicity, etc

Employee Statistics by Payment Type and Pay Frequency

Job Position Analytics

Employee Job Positions -1 Employee may have more than one position, one or more Departments, and/or one or more Manager

Terminations by Job Position

New Hires by Job Position

Annual Compensation by Job Position

Years Service by Job Position

Breakdown of Employees by Job Position by Age Group, Gender, Ethnicity, etc.

Turnover Rates Year over Year, by Job Position

HR Drill Through Capabilities

Drill down to employee details, start dates, termination dates, department details, job position, compensation information, etc.

Department Analytics

Employee Headcount by Department

Terminations by Department

New Hires by Department

Years of Services by Department

Breakdown of Employees in each Department by Age Group, Gender, Ethnicity, etc

Annual Compensation Rates By Department

Years of Service by Department

Employee Manager Headcounts and Trends

Departmental Turnover Rates Year over Year

AX Inventory Deliverables
Increase efficiency and improve profitability
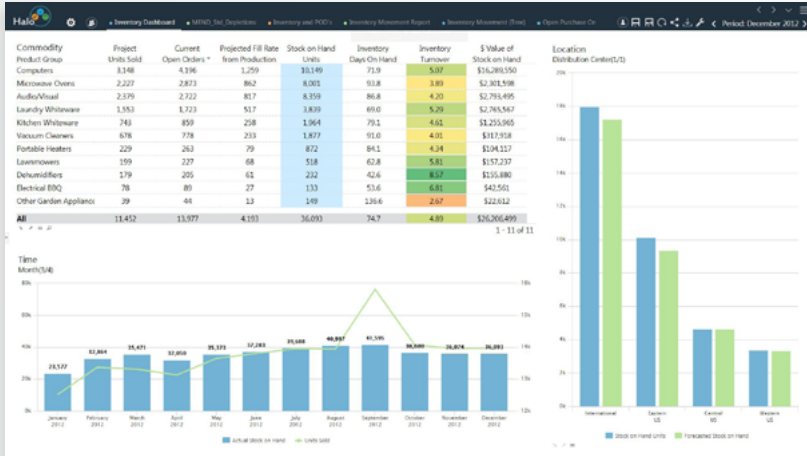
Track Inbound and Outbound Inventory and Warehouse Activities

Become an In-Stock, On-Time, Everything-is-where-it-should-be Company

Ensure Sufficient Supplies and Reduce Over-Capacity

Spot Slow Moving Inventory Before it Becomes a Problem

Finished Goods Stock Analysis

Inventory Movement Trends in Quantity and Currency
Beginning and Ending Inventory Balances in Quantity and Currency
Average Inventory in Quantity and Currency
Fill Rate based upon Shipments and Order Quantities
Inventory Turnover
Days On Hand
Open Orders
Raw Material Cost Trends
Raw Material Usage Trends
On-time Shipments
Back Order Rate

Stock Location Analysis

Stock on Hand for Finished Goods & Raw Materials across Multiple Warehouses, Facilities and Locations

Drill Through Capabilities

Drill down to transaction level detail for inventory movements including all product details, transaction types, transaction voucher ID's and transaction invoices

Halo delivers supply chain intelligence solutions to hundreds of enterprise customers and service provider partners in North and South America, Europe, and Asia-Pacific. Our customer-driven S&OP platform radically simplifies information management and operational analytics, enabling organizations to build more competitive supply chains. Halo replaces the complexity of siloed data sources and disparate applications with a single-purpose platform that lets firms analyze, decide and plan faster than ever before.