



Microsoft 365® Add-In

Extend the Power of Prophix Planning with Microsoft 365

When considering Financial Performance Management solutions, you are sometimes forced to choose between different approaches to solve your budgeting, planning, and reporting challenges. Some vendors provide all-in-one solutions, while others tend to be extensions of Microsoft Excel.

With Microsoft 365 Add-In, you can experience the best of both worlds. With seamless integration, you can leverage the planning power of Prophix, while also having the flexibility to contribute to budgets or build complex models from the comfort of Microsoft Excel.

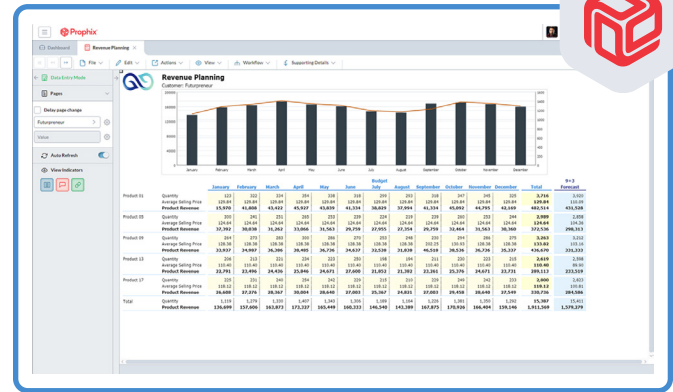
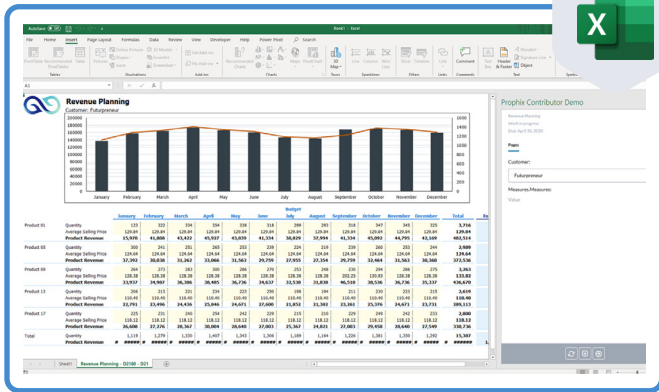
Whether you are looking to capitalize on Prophix's planning power or directly contribute to the budgeting process, Prophix has the right solution. Leverage Prophix to drive your complex Excel models, or infuse your PowerPoint® slides with live Prophix models to bring real-time charts and data into your presentations.

Get the convenience and flexibility you need when it comes to planning, modeling, and presenting with Microsoft 365 Add-In.

Integrate Prophix Data with Microsoft 365 to:

- Extend Prophix's budgeting and report distribution capabilities to non-finance users
- Utilize flexible modeling options in both Prophix and Excel
- Spice up PowerPoint presentations with live Prophix data and rich visuals
- Improve collaboration to streamline budgeting and planning





Plan Your Way with Contributor

Contributor extends Prophix's centralized planning and reporting functionality to stakeholders who contribute to the budgeting process using Microsoft Excel.

Contributor was built with spreadsheet users and non-finance contributors in mind, such as sales leaders, marketing executives, operations management, and more. Contributor improves collaboration, and transparency to simplify budgeting and shorten planning cycles.

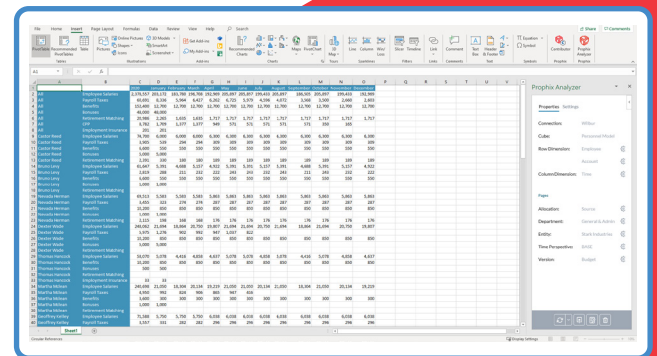
Whether you use simple or complex spreadsheets, want to utilize existing formulas, popular Excel tools, or would like the freedom and convenience to work offline, Contributor provides you the flexibility to plan your way.

Model Your Way with Analyzer

Step up your data analysis and modeling with Analyzer. Maintain a secure and controlled environment for your data while utilizing your Prophix data in Excel.

Analyzer eliminates the complexities associated with an Excel integration and allows your Prophix data to become the primary source for all your financial modeling. This is ideal for complex revenue forecasts or infrequent financial modeling.

By combining Prophix's centralized data with the flexibility of Excel's unique modeling capabilities, Analyzer opens new doors for one-off, non-standardized data modeling and analysis, ideally suited for Excel power users who desire more granular analysis.

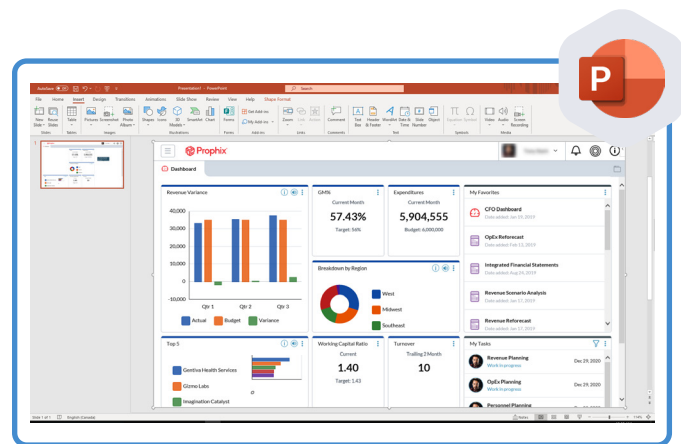
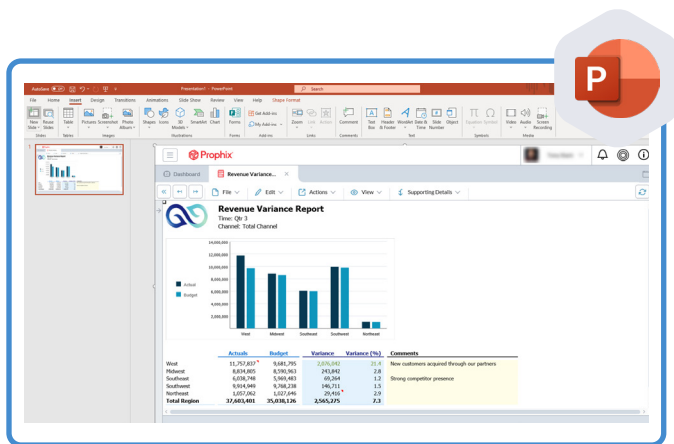


Present Your Way with Presenter

PowerPoint remains the powerhouse and medium-of-choice for most business presentations. With Presenter, you can make a visual impact.

Most management meeting slides contain static charts and KPIs. Often, questions come up that need to be answered later. Instead of having to revisit a revenue-related question, simply navigate to the appropriate template within PowerPoint to get an immediate answer.

By embedding valuable data from Prophix directly into your PowerPoint slides, you can create dynamic and interactive presentations, and improve meeting engagement and collaboration by ensuring you have data on-hand to make key financial decisions. Save time by quickly navigating to the details you need without ever having to leave PowerPoint.



Microsoft 365 Add-In lets you:



Save Time

Simplify and streamline your planning process with the flexibility and convenience of data collection directly from Excel.

With Contributor, you can now open Prophix planning templates in Excel, enabling non-finance users to input data, while maintaining the centralized workflow and security benefits of Prophix. Collate your data faster and more efficiently using Microsoft 365 Add-in.



Improve Collaboration

Improve collaboration by involving stakeholders in your presentations and data points. Explore results together and increase meeting efficiency with Presenter. Contributor lets you use Workflow commentary to provide the context behind your budget numbers, retrieve data from Prophix on-demand, review revisions, and approve projections for faster planning.

Stay better informed by receiving the latest reports with Prophix's automated report distribution capabilities



Flexibility to Model Prophix Data in Excel

With Analyzer, you can open Prophix data in Excel letting you build and maintain one-off complex Excel models using your favourite Excel tools. Once finished, easily push the data back for safe storage, and ensuring Prophix remains your single view of your financial truth.

Integrating Microsoft 365 Add-In will provide you the convenience and added flexibility you need to transform the way you budget, plan, and report.

About Prophix®

Ambitious finance leaders rely on Prophix® to plan smarter, move faster, and lead with greater control. Prophix One™, a Financial Performance Platform, connects planning, budgeting, forecasting, reporting, reconciliation, and consolidation in one unified experience.

With a complete suite of scalable solutions, AI-powered automation, and data you can trust, Prophix helps teams eliminate manual work, improve accuracy, and deliver insights that drive business results. Backed by nearly 40 years of experience, more than 3,000 active customers partner with Prophix to simplify complexity and stay ready for what's next. www.prophix.com



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