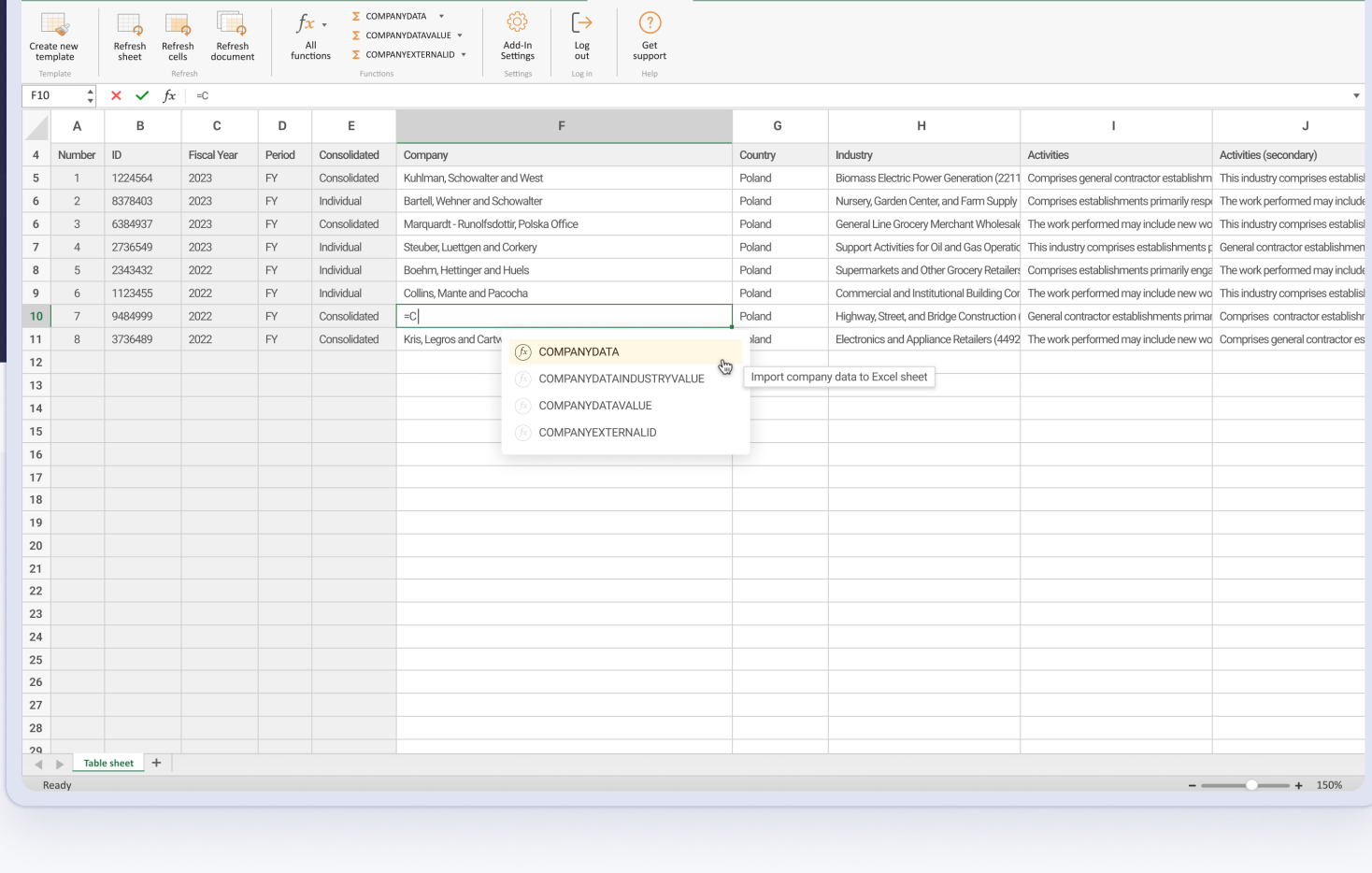


Excel Add-In With Access to Real-time Data via API

A powerful Excel add-in that simplifies the process of accessing up-to-date business data via API. The solution enables Excel access to Accounting, CRM, ERP, Marketing Automation, On-Premise, and Cloud data.



Business Challenge

Our customer from a financial services company, who used Excel for complex market analytics, needed help with an overwhelming reliance on manual data analysis processes, which was inefficient, time-consuming, and error-prone. Dealing with large amounts of data and finding specific information within it without special tools was challenging. Lack of access to accurate and actual data brought additional challenges to the analytics team and didn't allow them to stay ahead of market trends.

Company analysts usually work on multiple reports simultaneously, necessitating a solution that enables the efficient handling of numerous reports concurrently. Frequent work trips and lack of constant access to web services cause another challenge. The solution should allow offline access to reports, allowing users to continue working even without an internet connection.

Our task was to deliver a system capable of retrieving and representing financial data that is updated at the initiative of the Excel user. Advanced calculation, reporting functionalities, and searching features were required to widen the users' possibilities of navigating through the data sets and extracting valuable insights from them. Every opportunity of automation had to be used to the maximum.

Solution

One of our primary tasks was to keep our client's employees from changing their work habits. Therefore, we decided to implement the client-side part of the solution as a Microsoft Excel add-in. It allowed end users to access additional functionalities using the familiar interface.

For example, users can define and utilize custom Excel formulas to perform specific calculations and data manipulations, such as calculating complex financial metrics. Market researchers can use the add-in to fetch and analyze dynamic financial data from various sources, making informed decisions based on up-to-date information.

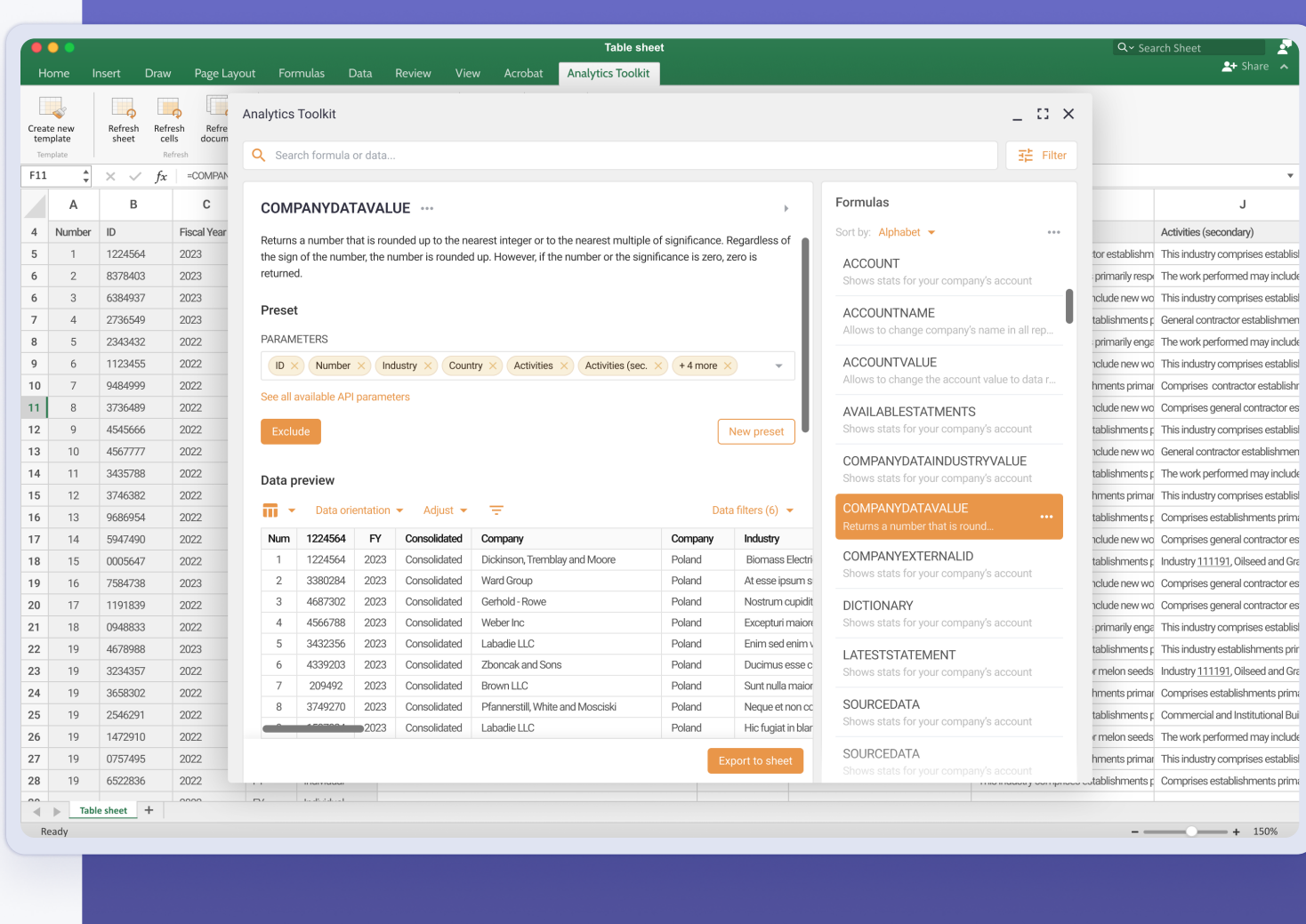
The add-in provides analytics access to detailed financial data related to specific companies, presented following global and local standards. It includes access to historical data spanning up to 10 years. Extensive search and filtering capabilities help find companies within specific industries or regions, filtering based on criteria such as revenue, market capitalization, or growth rates.

Our development team has implemented some automation features to streamline daily operations and free end users from the need to perform them manually. For example, the system supports the automation of data filling and reporting. Reports can be shared effortlessly with a broader audience. Users can set up automated distributions for various stakeholders, choosing what data to display to internal and external viewers.

When offline, the add-in provides access to existing data, albeit not the most up-to-date version. This feature allows users to work on their reports in offline mode. The data can automatically synchronize with the latest updates once internet connectivity is restored, ensuring the report's accuracy.

The add-in offers a streamlined solution for transferring financial data into Excel, eliminating the laborious task of manual copying and pasting. Its integration with the client's CRM, ERP, and various other tools facilitates a fast and uncomplicated approach to importing data. Users can select the specific dimensions and metrics they require, and the add-in will transfer the desired information directly into their designated cells.

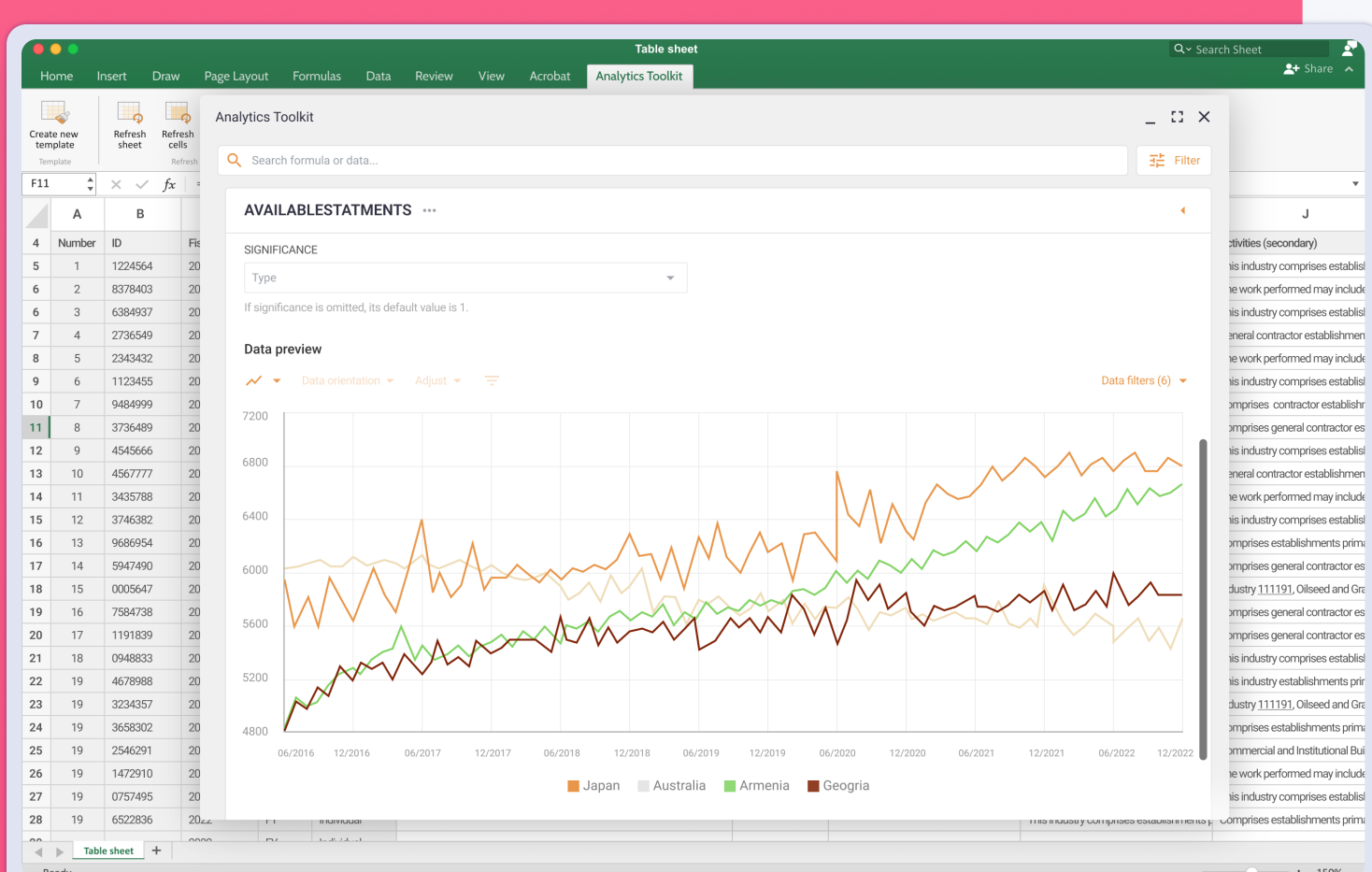
Seamless access to up-to-date data is provided by RESTful API. Our developers have implemented the interactive documentation and testing portal that helps developers and integration teams to familiarize themselves with the API's endpoints, parameters, and responses and test their integration with the API before deploying it in production environments.



Project in Figures

12+
Months
Duration

2500+
Estimated
man-hours



Applied Technologies

Result

XB Software team has designed and delivered a system consisting of a Microsoft Excel add-in that works with up-to-date financial data via a robust API. The solution provided has significantly reduced the time and effort required by the customer finance team to convert individual data tables for Excel analysis. They can now effortlessly generate personalized Excel reports and conveniently update them with the latest data by simply clicking "refresh".

- ✓ **Simple and flexible connectivity.** Integration with enterprise apps enables access to actual and historical data with advanced searching and filtering capabilities;
- ✓ **Financial data made easy.** Access to complex financial data through a familiar interface;
- ✓ **One-click access to live reports.** Automated data filling makes reporting less labor-intensive. The customizable report distribution system provides instant access to them to all stakeholders.

Your questions and requests are always welcome!