



# Turn Your Data Around With Solver & Power Automate

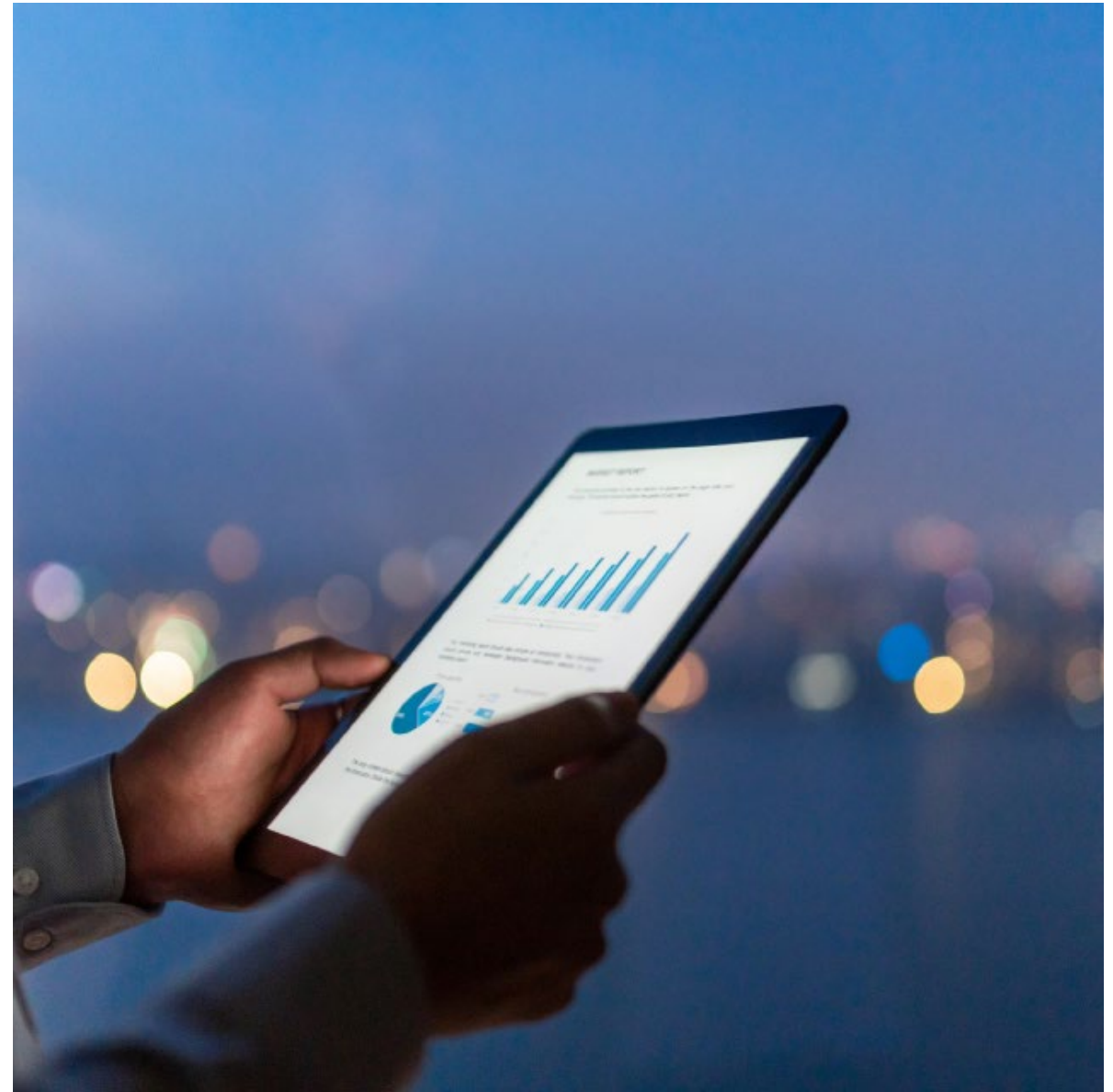
April 23, 2025

# Business Technology Services

Forvis Mazars can help support your organization with enterprise resource planning (ERP), customer relationship management (CRM), advanced technology, & managed service solutions.

Our end-to-end services can help clients achieve their digital transformation goals & include:

- Technology assessments
- Design
- Implementation
- Upgrades
- Automation
- Training
- Monitoring
- Support



# Business Technology Services

 **ERP**


Microsoft Dynamics 365

Finance	Supply Chain
Commerce	Project Operations
Business Central	Dynamics GP

NetSuite

Sage & Sage Intacct

Trimble Construction One


 **CRM**

Microsoft Dynamics 365

Sales	Customer Service
Customer Insights	Field Service

Salesforce

Marketing Automation

 **Advanced Technology**

Insights

Microsoft Power BI

Solver Planning & Analysis

Automation

Microsoft Power Platform

Robotic Process Automation (RPA)

App Development

 **Managed Services** for business applications, IT, & cybersecurity support.

Microsoft Partner

ORACLE  
**NetSuite**  
Solution Provider Partner

**Sage** Partner

salesforce **PARTNER**

  
**solver**

**Trimble**  
Construction One™

**forvis  
mazars**

# Today's Presenters



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# Objectives

1. Recognize the purpose of the Solver Data API
2. Explain how Power Automate can connect to the Solver Data API
3. Identify the benefits of pulling data out of Solver



# Agenda

1. What Is the Solver Data API?
2. Setting the Stage
3. Connecting to the Solver Data API
4. Pushing Data Into Business Central



# 01

## What Is the Solver Data API?



# What is Solver?

A suite of extended financial planning & analysis tools

- xFP&A solution
- Cloud-based
- Reporting, planning, data warehouse
- Integration with Power BI & Tableau





# Solver Data API

## A powerful tool for data integration & management

- Method to enable data to be pulled from the Solver data warehouse
- Use cases:
  - Add to a separate data warehouse
  - Export data to Excel
  - Send to a personal Azure data factory
  - Send to another system
  - & more



# Solver Data API

Pushing data into ERP



>> *Send to Microsoft  
Dynamics 365  
Business Central*

# 02

## Setting the Stage



# Setting the Stage

## How to streamline financial reporting & overhead allocations

- Solver is used for financial reporting
- Allocations of overhead expenses are created from actuals
- Allocation entries are needed in Business Central

# Setting the Stage

## How to streamline financial reporting & overhead allocations (cont'd)

- Actual rent dollars are imported from Business Central
- Rent expense will be allocated to departments based on square footage
- An Input Form will be used to calculate the amounts
- That data will be pushed into Business Central using Power Automate

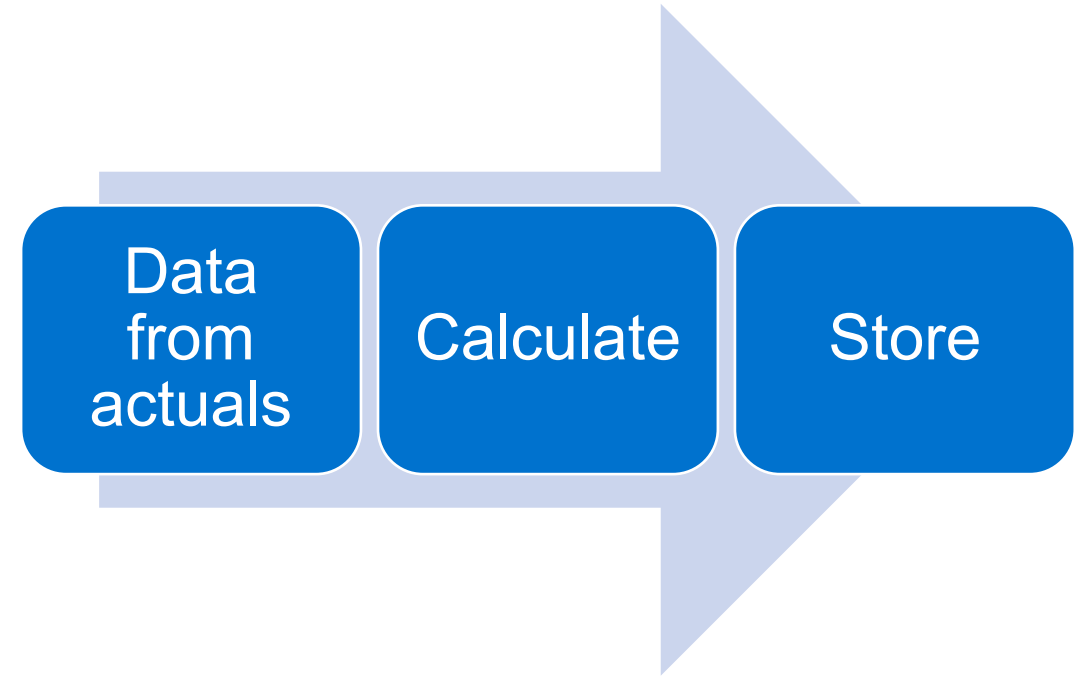


# Setting the Stage

## Alternative Method for Calculating

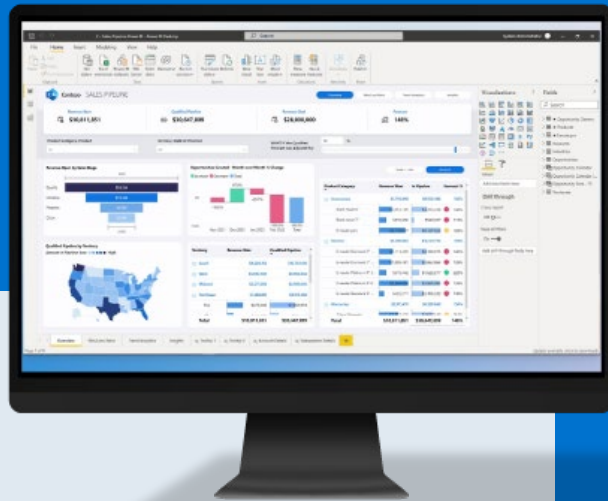
### Rules

- Processes for creating, deleting, & modifying data
- Based on stored procedures
- Can be run manually or on a schedule



# Demo

Microsoft  
Partner



# 03

## Connecting to the Data API



# Setup in Solver

## Enabling the API

### Steps to enable

- Navigate to the data warehouse >> Configuration >> API
- Enable “API ACCESS” by clicking on the toggle
- Select the modules to enable for the API
- Click “Save”

# Setup for Solver

## What's needed to connect

### API URL

- This is the URL that will allow a user or automation to call a specified API endpoint
- Examples:

<https://demo.app.solverglobal.com/api/v1/>

<https://demo.app.solverglobal.com/api/v1/data/GL>

### Access Token

- An access token is what allows authentication to the API
- These can take a variety of forms, but for Solver it uses a Bearer token
- Example:

eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJzdWIiOiIxMjM0NTY3ODkwIiwibmFtZSI6IkpvaG4gRG9lIiwiaWF0IjoxNTE2MjM5MDIyfQ.SflKxwRJSMeKKF2QT4fwpMeJf36POk6yJV\_adQssw5c



# Setup for Solver

## How it's used

### API Endpoints

- Calling <https://demo.app.solverglobal.com/api/v1/> gives a list of modules that can be queried

```
{  
  "label": "General Ledger",  
  "shortLabel": "GL",  
  "objectType": "Module"  
}
```

- To call a specific module we just append /data/MODULENAME

### Calling the Module

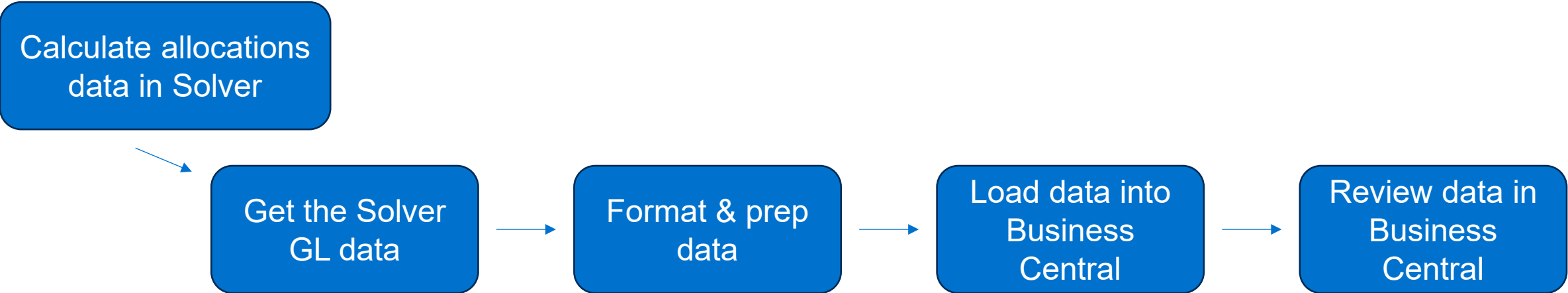
- To put our API call together, we need to use the “shortLabel” value
- Using the example above for General Ledger our call would look like the below:

<https://demo.app.solverglobal.com/api/v1/data/GL>

# Setup in Solver

## How it's used

### Example flow of data



# Demo



# 04

## Pushing Data Into Business Central



# Terminology

## Introduction to Power Automate


**Automation:** In the context of Power Automate, refers to the process of creating workflows that automatically perform tasks & processes without (or with less) manual intervention, e.g., Bill from accounting doesn't need to spend time inputting pre-approved invoices to Business Central

**Flows:** Automated sequences of actions & events that perform specific tasks consisting of a trigger & one or more steps


**Trigger:** Event that starts a cloud flow

**Connectors:** Components that allow Power Automate to interact with various services & applications, i.e., the steps in a flow


**API:** Set of rules & protocols that allows different software to communicate with each other. In this context, Power Automate uses APIs to connect to other services & applications to enable automations to exchange data between systems




OneDrive for Business  
Microsoft




SharePoint  
Microsoft




Dynamics 365 (deprecated)  
Microsoft Premium




Salesforce  
Microsoft Premium




SQL Server  
Microsoft Premium




Dropbox  
Microsoft




MailChimp  
Microsoft Premium




SurveyMonkey  
Microsoft Premium




Gmail  
Microsoft




OneNote (Business)  
Microsoft




SFTP  
Microsoft




SFTP - SSH  
Microsoft




Azure OpenAI (preview)  
Microsoft Premium



Outlook.com  
Microsoft



Outlook Tasks  
Microsoft



RSS  
Microsoft



# Core Concepts

## Introduction to Power Automate

### Flows

#### Cloud Flows:

- **Instant Flows:** Triggered manually by the user
- **Automated Flows:** Triggered automatically by specific events, such as receiving an email
- **Scheduled Flows:** Run on a schedule, such as daily or weekly

**Desktop Flows:** RPA built using Power Automate Desktop, particularly useful for automating interactions with desktop applications, data extraction from websites, & data entry

### Connectors & Triggers

**Connectors:** There are over 1,000 prebuilt connectors, standard & premium, in Power Automate

- **Standard Connectors:** Available to all users, commonly used services like SharePoint, Outlook, & OneDrive
- **Premium Connectors:** Require premium license, more advanced services like Salesforce, SQL, & Dataverse

#### Triggers:

- Manual button (instant flow)
- When an email is received, when a file is created, etc. (automated flow)
- Every day, every week, on Mondays & Wednesdays, etc. (scheduled flow)

# Pushing Data Into Business Central

## How it's all working

### Prepping before action

- Input all required data into Solver
- Confirm the account getting the data has a Power Automate Premium License
- Confirm the account getting the data has permissions in Business Central to load data
- Identify which Environment & Company the data is going into in Business Central
- After the minimum requirements are met, Automation Buildout can begin!

# Pushing Data Into Business Central

## How it's all working

### Getting the data from Solver


- Know the API we need to call
- In our example, we are using the “General Ledger” module
  - <https://demo.app.solverglobal.com/api/v1/data/GL>
- Other modules can be found by calling the API with no module
  - <https://demo.app.solverglobal.com/api/v1>
  - Review the data from the API
  - Know the fields that come from the API
  - Identify the fields needed for Business Central
  - Identify the fields needed for Business Central that may not come from Solver directly

# Pushing Data Into Business Central

## How it's all working

### Building the automation

Build an instant cloud flow



Triggered manually from any device, easy-to-share instant flows automate tasks so you don't have to repeat yourself.

Examples:

- Get an automatic mobile alert whenever a VIP client emails you
- Save all your email attachments to a folder automatically

Flow name

Solver\_To\_BC

Choose how to trigger this flow \*

- ☒ Manually trigger a flow  
Flow button for mobile
- ☐ When Power Apps calls a flow (V2)  
Power Apps
- ☐ Run a flow from Copilot Skills
- ☐ When Power Virtual Agents calls a fl...  
Power Virtual Agents
- ☐ When a flow step is run from a busin...  
Microsoft Dataverse
- ☐ When a row is selected  
Microsoft Dataverse
- ☐ For a selected message (V2)

Skip Create Cancel

- Add a new cloud flow from the Power Automate Portal
- <https://make.powerautomate.com>
- Select the preferred trigger
- **In our example we will be using a “Manual” trigger**
- Enter in a name for the Cloud Flow
- Click Create

# Pushing Data Into Business Central

## How it's all working

### Building the automation

Add an action ×


Connector type

Select a connector type ▼

Triggers or actions

Actions ▼

☒ Group by connector


 HTTP Premium

[See more](#)

HTTP Premium i

HTTP + Swagger Premium i


HTTP Webhook Premium i

- Click the “” icon to add an action
- Search for the “HTTP” premium action
- Select the HTTP action from the menu

# Pushing Data Into Business Central

## How it's all working

### Building the automation

 HTTP - Get Solver GL API Data

Parameters

Settings

Code view

About

URI \*

https://demo.app.solverglobal.com/api/v1/data/GL

Method \*

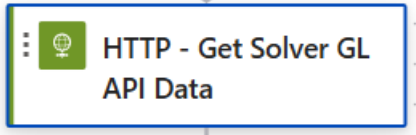
GET

Headers

Authorization

Bearer eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJzdWIiOiIxMjMNTY3ODkwIiwibmFtZSI6IkpvaG4gRG9lIiwiaWF0IjoxNTE2MjM5MDQ5LCJpcyI6IjY2OT44fwpMeJf36POk6yJV\_adQssw5c

- Click the action in the flow to configure



- Enter in our API call for “GL” data from Solver Global
- Enter in the Headers information
  - Authorization**
  - Bearer <BearerTokenFromSolver>**



# Pushing Data Into Business Central

## How it's all working

### Building the automation

Add an action ×


Connector type

Select a connector type ▼

Triggers or actions

Actions ▼


☒ Group by connector

 Dynamics 365 Business Central Premium [See more](#)

Run action (V3) Premium i

Get record (V3) Premium i

Create record (V3) Premium i

- Click the “” icon after our HTTP action to add another action
- Search for “Business Central”
- Select the “Create record” action from the menu
  - This may require clicking “See more” to find

# Pushing Data Into Business Central

## How it's all working

Parameters

Settings

Code view

Testing

About

Environment \*

PRODUCTION

Company \*

BKDT\_Training

API category \*

v2.0

Table name \*

journalLines

Advanced parameters

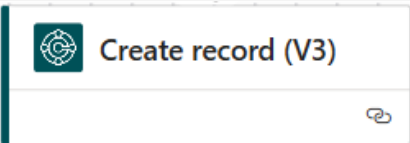
Showing 2 of 17

Show all

Clear all

Journal Id

- Click the action in the flow to configure



- Enter in our API call for “GL” data from Solver Global
- Enter in the required information
  - Environment
  - Company
  - Table Name
- This will allow for the selection of “Advanced parameters”

# Q&A



Business  
Technology  
Services

## Questions?

# Contact

## Forvis Mazars



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