

# Transforming Decision Making With Solver's AI-Enhanced xFP&A

January 2026



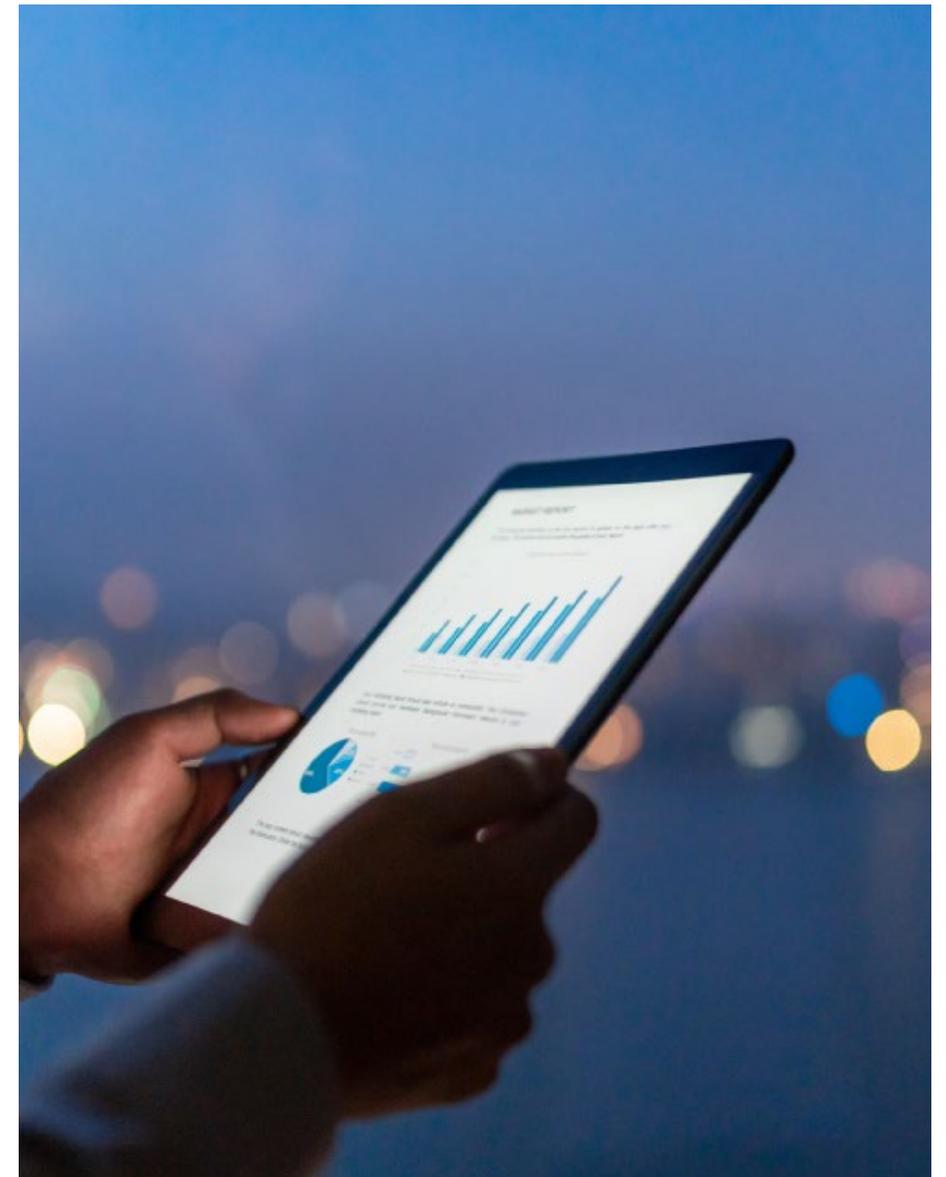
# Business Technology Services

**We solve for business challenges & support innovation through technology solutions.**

Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, & business intelligence (BI) tools.

Our end-to-end technology solutions & managed services help clients achieve their digital transformation goals. Services include:

- |  |                                      |   |  |
|--|--------------------------------------|---|--|
|    | Solution Assessment & Selection      |    | Implementation Project Rescues         |
|    | System Implementation & Integration  |    | Business Intelligence (BI) & Analytics |
|    | Process & Technology Design          |    | Robotic Process Automation (RPA)       |
|  | Upgrades, Enhancements, & Automation |  | Custom Application Development         |
|  | Training, Monitoring, & Support      |  | IT & Cybersecurity Managed Services    |



# Business Technology Services For Middle Market & Global Organizations



## System Integration

### ERP

- Microsoft Dynamics 365 Finance, Supply Chain Management, Project Operations, Commerce, Business Central (GP, NAV, AX)
- Oracle NetSuite
- Sage Intacct, Sage 100, Sage 500, Sage Fixed Assets
- Trimble Construction One, Viewpoint, Spectrum, Vista

### Intelligence & Automation

- Microsoft Copilot Studio
- Microsoft Power Platform
- Microsoft Azure
- Workato
- Artificial Intelligence (AI)
- Robotic Process Automation (RPA)
- Custom Application Development
- Business Intelligence (BI)
- Solver Extended Financial Planning & Analysis (xFP&A)

### CRM

- Microsoft Dynamics 365 Sales, Customer Insights, Customer Service, Field Service
- Marketing Automation



## Managed Services

### Cybersecurity

- 24/7/365 Security Operations Center (SOC)
- Managed Detection & Response (MDR)
- Managed Security Information & Event Management (SIEM)
- Vulnerability Management
- Managed Brand Protection
- Managed Incident Response
- Virtual CISO (vCISO) Advisory
- Partnerships With SentinelOne, Elastic, Qualys, & More

### IT Operations

- Virtual Chief Information Officer (CIO)
- Network Operations Center (NOC)
- Cloud Infrastructure (Azure & AWS)
- Managed Server & Desktop
- Managed Backup & Recovery
- Procurement

### Business Applications

- Microsoft Dynamics ERP & CRM
- Microsoft Power Platform
- Microsoft 365
- Oracle NetSuite
- Sage & Sage Intacct
- ISV Add-On Management
- Release & Upgrades Management
- Automated Testing Setup & Support
- End-User Training

# Today's Presenter



## **Charles Allen**

Senior Managing Consultant

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Transforming Decision Making With Solver's AI-Enhanced xFP&A

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# Objectives

1. Describe AI-powered xFP&A tools to drive informed decision making across the organization
2. Identify & mitigate risks using advanced analytics & predictive modeling tailored to the unique industry challenges
3. Define best practices for cross-functional collaboration by integrating financial & operational data



# Agenda

- 1. Solver Introduction
- 2. Using Copilot for Help
- 3. Using Copilot for Analysis
- 4. Looking Ahead
- 5. How Forvis Mazars Can Help



Transforming Decision Making With Solver's AI-Enhanced xFP&A



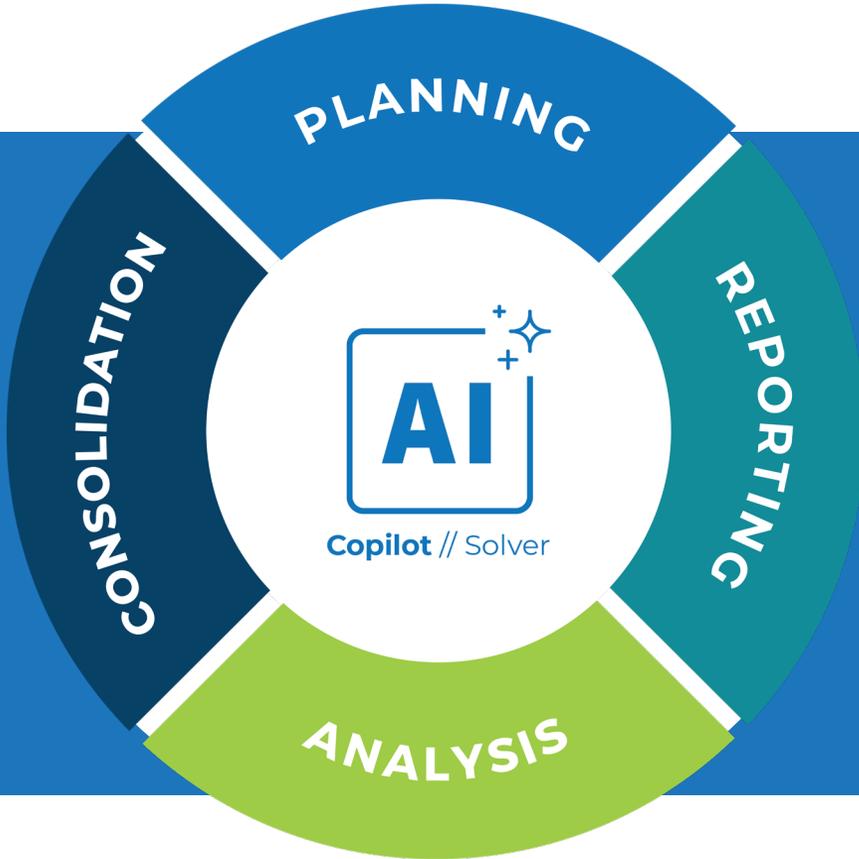
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# 01

## Solver Introduction





## ACCELERATE INTELLIGENT DECISIONS

Solver is an AI-accelerated extended financial planning & analysis solution (xFP&A) that increases access to actionable insights beyond the finance department.



# About Solver

- Founded in 1996
- Headquartered in California, with 15 offices globally
- One of the first CPM solutions to offer a web portal globally
- Specialize in multiple verticals, including SaaS, Nonprofits, Hospitality, & Healthcare
- Experienced team with deep knowledge on CPM & Business Intelligence
- Recognized as a G2 Leader in Corporate Performance Management
- SOC 2 & HIPAA Certified/Compliant
- Partnered with top global software publishers & business consulting firms



# solver



**EVERY USER  
RECEIVES**

## SOLVER SUITE

**AZURE CLOUD**

Security  
Scalability

**eLEARNING**

On-demand  
Certifications

**DATA  
WAREHOUSE**

Pre-built  
Configurable  
Connectors

**REPORTING**

Financial & Operational  
Consolidations  
Dashboards

**PLANNING**

Budgeting  
Forecasting  
What If Analysis

**MARKETPLACE**

100+  
Ready-to-use  
Templates

# 02

## Using Copilot for Help



ANALYSIS

CRM

OTHER

CLOUD

# Solver Help Agent

Solver Copilot acts as an intelligent, always-available guide, trained on Solver documentation, training materials, & new Solver content. It can support users across all experience levels by:

- Onboarding new users with step-by-step guidance & interactive walkthroughs
- Providing real-time, contextual help while navigating the Solver platform
- Assisting advanced users with building complex reports, planning templates, & data integrations
- Offering advanced support for troubleshooting issues & exploring innovative features
- Adapting over time by learning from user behavior & product updates to deliver more relevant assistance
- Reducing reliance on support teams by enabling self-service learning & streamlined issue resolution



# Solver Copilot Help Agent

- Launched v1 October 2024
- Generative AI for product help
- Built on Solver product help, support resources, white papers, & more
- 18,000+ questions asked & answered since launch



Transforming Decision Making With Solver's AI-Enhanced xFP&A

Solver Copilot ↻ ✕

**You**  
How do I configure Publisher to send reports via email?

**Solver Copilot**  
To configure **Solver Publisher** to send reports through email, follow these steps:

---

**Steps to Configure Publisher for Email Distribution**

- 1. Access the Publisher Module:**
  - Ensure you have purchased and activated the Publisher feature. If not, contact your salesperson to enable it.
  - Navigate to the **Publisher** module in the Solver Cloud portal.
- 2. Create a New Publisher Subscription:**
  - Click the **New** icon in the upper right-hand corner to open the Publisher Subscription wizard.
- 3. Set Up the Subscription:**
  - **Name:** Enter a user-friendly name for the subscription. This name will appear in the subject line of the email.
  - **Description:** (Optional) Add a description for internal reference. This will not appear in the email.
  - **Company:** If your organization has multiple companies, select the appropriate one from the dropdown.

Hey, ask anything about Solver... ➤

# Solver Help Agent

Example of using the Help agent to get “how to” answers

Export Comment Share Add to Archive Run in Report Designer Information

Report parameters Data Warehouse

Period: 202109 Entity: SUS Department: 100:500 Budget Scenario: BUD Forecast Scenario: FCST

Run Last run: a month ago Auto-refresh: Off

	Sep-2021 Actual	Sep-2020 Actual LY	Sep-2021 Budget	Act vs Act LY Var	Act vs Act LY Var %	Act vs Bud Var	Act vs Bud Var %	Sep-2021 Actual YTD
<b>REVENUE</b>								
TOTAL REVENUE	2,563,145	1,271,357	1,267,233	1,291,788	101.6%	1,295,912	102.3%	13,968,5
<b>COST OF SALES</b>								
TOTAL COST OF SALES	1,454,515	262,877	246,880	1,191,638	453.3%	1,207,635	489.2%	3,762,8
GROSS MARGIN	1,108,630	1,008,480	1,020,353	100,150	9.9%	88,277	8.7%	10,206,0
GROSS MARGIN %	43.25%	79.32%	80.52%	7.75%		6.81%		73.0
<b>OPERATING EXPENSES</b>								
TOTAL OPERATING EXPENSES	930,355	980,306	931,380	(49,952)	-5.1%	(1,025)	-0.1%	8,996,4
EBITDA	178,276	28,174	88,973	150,102	532.8%	89,303	100.4%	1,209,6
<b>OTHER INCOME/EXPENSES</b>								
TOTAL OTHER INCOME/EXPENSES	89,671	89,731	84,107	(60)	-0.1%	5,564	6.6%	849,7

Content KPI Dashboard Cash Flow Tree **Consol P&L** Consol Balance Sheet Consol Cash Flow 100

Help Agent

Solver Copilot

### Options for Sharing Report Results in Solver

Solver provides two primary methods for sharing report results, depending on whether the report has been executed or is a template:

#### 1. Sharing Executed Reports

- When you share executed reports, the results are sent to the recipients' Archive or Email.
- This method is ideal for sharing finalized report results with users who need to view the data but do not need to edit the report template.

#### 2. Sharing Report Templates

- For users with access to the Live Reporting module, report templates can be categorized and shared with other users.
- Steps to share report templates:
  - Create a Category:** Reports must be assigned to a category before sharing. Categories allow you to group and organize reports.
  - Share the Category:** Share the category with individual users or roles. All reports within the category will be accessible to the shared users.
  - Manage Categories:** You can add or remove reports from the category as needed. Removing a report from a shared category will withdraw access for other users.

#### Key Considerations for Sharing:

- Ownership:** The creator of a report is its owner by default. Only the owner can rename or delete the report.

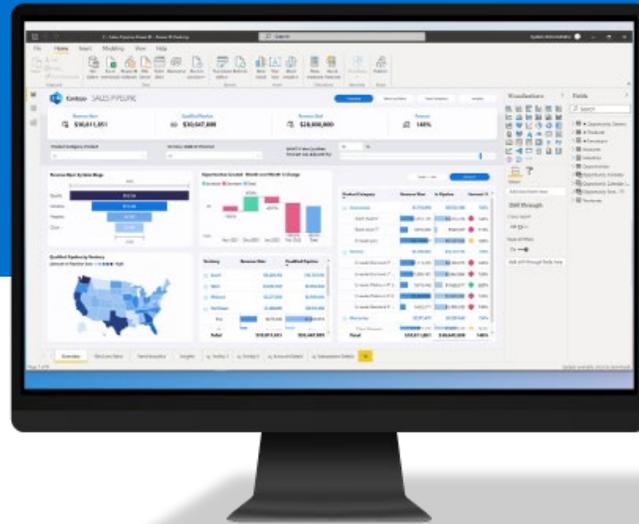
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# Demo



solver



# 03

## Using Copilot for Analysis



# Solver Analysis Agent

Solver Copilot elevates data analysis by offering deep, contextual, & proactive insights. Solver Copilot enhances budgeting & forecasting processes by:

- Identify outliers, anomalies, & deviations from expected performance
- Detect emerging trends & shifts in patterns that may not be immediately obvious
- Perform root cause analysis on variances to uncover underlying drivers
- Automatically generate narrative summaries & insights in natural language
- Offer predictive & prescriptive recommendations to inform decisions
- Correlate data across multiple sources to provide a holistic view of the business
- Monitor critical metrics & alert users to significant changes or risks



# Solver Report Analysis Getting Answers

Example of asking a question & getting answers about the displayed report

The screenshot displays the Solver Copilot interface. At the top, it shows 'Report Templates > R111 - Monthly Reporting Package'. Below this are report parameters: Period (202109), Entity (SUS), Department (100:500), Budget Scenario (BUD), and Forecast Scenario (FCST). A 'Run' button is visible, along with 'Last run: a month ago' and an 'Auto-refresh: Off' toggle.

The main area shows a 'Consolidated Profit & Loss' report for 'Entity: SUS - Corporate US'. A 20% variance flag is present. The report includes a table with columns for 'Sep-2021 Actual', 'Sep-2020 Actual LY', 'Sep-2021 Budget', 'Act vs Act LY Var', 'Act vs Act LY Var %', 'Act vs Bud Var', 'Act vs Bud Var %', and 'Sep-2021 Actual YTD'.

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At the bottom of the report, there are tabs for 'Content', 'KPI Dashboard', 'Cash Flow Tree', 'Consol P&L', 'Consol Balance Sheet', and 'Consol Cash Flow'. The 'Consol P&L' tab is selected, showing a '100%' zoom level.

On the right side, the 'Analysis Agent' chat window is open. It displays a 'Welcome to Solver Copilot' message and a question: 'As a world-class CFO reviewing this P&L report, what are the five most important questions I should be asking to understand performance, risks, and opportunities?'. Below the question, it lists 'Top 5 CFO Questions for This P&L Review':

1. What are the key drivers behind revenue and expense variances at the departmental level (e.g., Administration, Finance & Accounting, HR, Professional Services, Sales & Marketing) versus budget and forecast?
  - o Focus: Identifying over/under-performance and root causes.
2. How do the corporate P&L margins compare to prior periods and plan, and where are the main pressure points (gross margin, operating margin, net margin)?
  - o Focus: Assessing profitability trends and margin risks.

At the bottom of the chat window, there is an input field with the text 'Ask anything' and a note: 'Solver Copilot uses AI. Verify results.'



# Solver Copilot Analysis Charting

Example of asking Copilot to generate trend reports

Export Comment Share Add to Archive Run in Report Designer Information

Report parameters Data Warehouse

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Run Last run: a month ago Auto-refresh: Off

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Content KPI Dashboard Cash Flow Tree **Consol P&L** Consol Balance Sheet Consol Cash Flow 100

Analysis Agent PREVIEW

Create two trend charts:

- Total Revenues — showing three data series: Actual + Forecast (current year), Actual (last year), and Budget (current year).
- EBITDA — using the same three data series. Each chart should clearly display month-by-month trends for comparison, with a legend identifying each series.

**Monthly Actual, Forecast, and Budget Comparison**

Table of chart showing Total Revenues by month for Actual LY

Ask anything

Solver Copilot uses AI. Verify results.



# Solver Copilot Analysis

## Finding Anomalies

Example of asking Copilot to search for anomalies in the data

Export Comment Share Add to Archive Run in Report Designer Information

Report parameters Entity Department Budget Scenario Forecast Scenario Data Warehouse

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Content KPI Dashboard Cash Flow Tree **Consol P&L** Consol Balance Sheet Consol Cash Flow 100%

Analysis Agent PREVIEW

Identify the top 3 anomalies — values, trends, or relationships that appear unusual or inconsistent. For each anomaly, explain why it stands out, what might be causing it, and whether it could indicate a data issue or a business issue.

### Top 3 Anomalies in the P&L Report and Trend Charts

- EBITDA Volatility and Unexpected Swings**
  - Observation:** Chart shows strong volatility in EBITDA month-to-month, with some periods of negative or near-zero EBITDA despite healthy revenue and budget projections.
  - Why It Stands Out:** Consistent EBITDA should generally trend with revenue unless affected by one-off items or major cost swings. These abrupt changes suggest more than routine expense fluctuations.
  - Potential Cause:** Possible large, irregular operating expenses, reclassification of costs, or timing of expense accruals. Alternately, may indicate mis-booked transactions or one-off adjustments.
  - Risk Type:** Likely a *business issue* (e.g., unexpected cost spikes or revenue recognition issues), but if periods of zero/negative EBITDA do not align with expected events,

Ask anything

Solver Copilot uses AI. Verify results.



# Solver Copilot Analysis

## What If Analysis

Example of asking Copilot to perform what if analysis

Export Comment Share Add to Archive Run in Report Designer Information

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Analysis Agent (PREVIEW)

Use the Current Year Act + Fcst Total column and calculate the Total Estimated EBITDA for the current year, assuming revenues increase by 10% and cost of goods sold (COGS) increase by 7%. Present the recalculated EBITDA figure and explain the impact of these changes compared to the original estimate.

### Recalculated EBITDA—Current Year Estimate (Assuming Revenue +10%, COGS +7%)

- Original Estimated EBITDA (Actual + Forecast Total): 1,449,653
- Recalculated EBITDA (with 10% Revenue growth, 7% COGS increase): 2,960,128
- Net Increase: +1,510,475 (+104%)

### Impact Analysis

- EBITDA more than doubles under scenario assumptions.
  - Revenue increase (+10%) is substantially larger than COGS (+7%), expanding gross margin and passing through to EBITDA.
  - Operating expenses are assumed flat, so margin gains accrue fully.

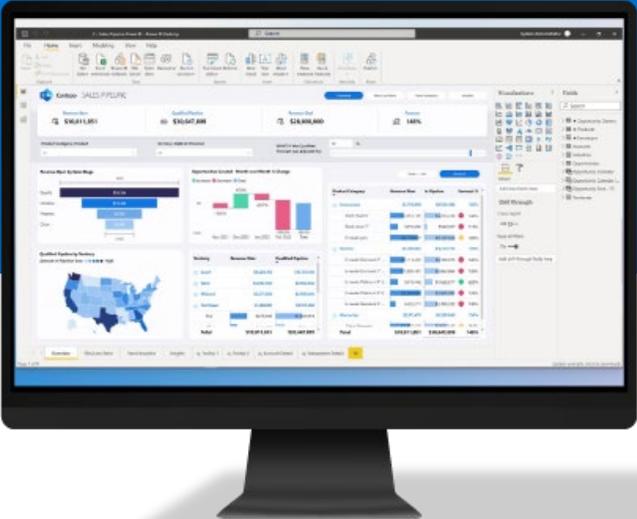
Key Takeaway: The business is highly sensitive to

Ask anything

Solver Copilot uses AI. Verify results.



# Demo



# 04

## The Road Ahead



# Solver's Preparation for the Future

AI AUTOMATION	Copilot for Planning	☆ ☆ ☆ ☆
AI AUTOMATION	Copilot for Task Automation	☆ ☆ ☆ ☆
AI AUTOMATION	Copilot for Analysis	☆ ☆ ☆
AI AUTOMATION	Copilot for Help	☆ ☆
INDUSTRY SPECIALIZATION	Industry Team & Industry Assets	☆ ☆
TEMPLATE AUTOMATION	Pre-Built Reports & Planning Forms	☆
INTEGRATION AUTOMATION	QuickStart	☆



# The Pillars of Solver's AI Strategy

## **Solver Copilot**

The experience layer

---

The primary customer-facing identity for Solver AI. Solver Copilot is a suite of intelligent assistants designed to accelerate intelligent decisions across planning, analysis, and productivity.

## **Solver AI**

The intelligence engine

---

The layer of proprietary AI services powering Solver Copilot and Solver Agents. Solver AI delivers automation, prediction, and contextual intelligence for xFP&A.

## **Solver Agents**

The doers

---

Specialist, autonomous agents that get work done behind the scenes. Includes Help Agent (guidance), Planning Agent (forecasting & budgeting), Analysis Agent (insights), and Task Agent (automation).

\*Semi-autonomous and autonomous agents planned in H2 2026 and 2027.

## **Solver Data Warehouse**

The environment

---

The single source of truth where data comes together. Solver connects with virtually any data source, including leading ERPs, to deliver consolidated, AI-powered insights.

## **Authentic Intelligence**

Our guiding philosophy

---

Solver's human-first AI principle and thought leadership stance. Every feature is evaluated through the lens of how to accelerate intelligent decisions.

# Solver's AI Road Map

## Analysis Copilot



- **Preview:** Generative data analytics based on executed Reports/Archive
- Customers: Must request preview access [preview@solverglobal.com](mailto:preview@solverglobal.com)
  - Customer admins must OPT into using AI for Analysis
- See help documentation for full details & FAQ

## Analysis Agent



- **General Availability**
  - **16 January**
- Customer admins must OPT into using AI for Analysis

## Help Agent v2



- Unified experience with Analysis Agents
- Context aware

## Connector Studio



- Custom build data connectors from REST APIs
- AI Prompt driven connectors

## Agent to Agent



- Prototype Model Context Protocol (MCP) servers
- Prompt Solver agents to communicate with Business Central data

Nov

2025

Jan

2026 →

+

Full AI Road Map - Jan 2026

# Long-Term Road Map

## Next Gen Reporting

New AI Generation Reporting

## External Agent Communication

Integrate With External Agents Using the Model Context Protocol (MCP)

## Autonomous Workflows

AI-Driven Custom Workflows Integrated With Copilot Agents

## Advanced ETL

AI-Driven Data Transformations

## AI Infusion

Reimagining Features Driven by AI Innovations

## Copilot Agents

Specialized AI Agents or Build Your Own



# 05

## How Forvis Mazars Can Help



# How Forvis Mazars Can Help Artificial Intelligence

As AI reshapes how businesses operate, real success lies in aligning innovation with accountability, clarity, & trust.

## Our Core Capabilities



AI Strategy & Use Case Development



Data & Technology



AI Risk & Governance



Deployment & Change Management

We work with organizations across all stages of AI maturity, whether you're just starting to formalize your governance, or you need to evolve an existing program to meet new risk, regulatory, or scaling demands. We help organizations:

1. Strategize
2. Prepare
3. Protect & Control
4. Implement & Optimize

Q&A



Business  
Technology  
Services

Questions?

# Contact

## Forvis Mazars



### **Charles Allen**

Senior Managing Consultant

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