



## **Solver xFP&A: Year in Review & What's Ahead**

December 2025











**forv/s**  
**mazars**

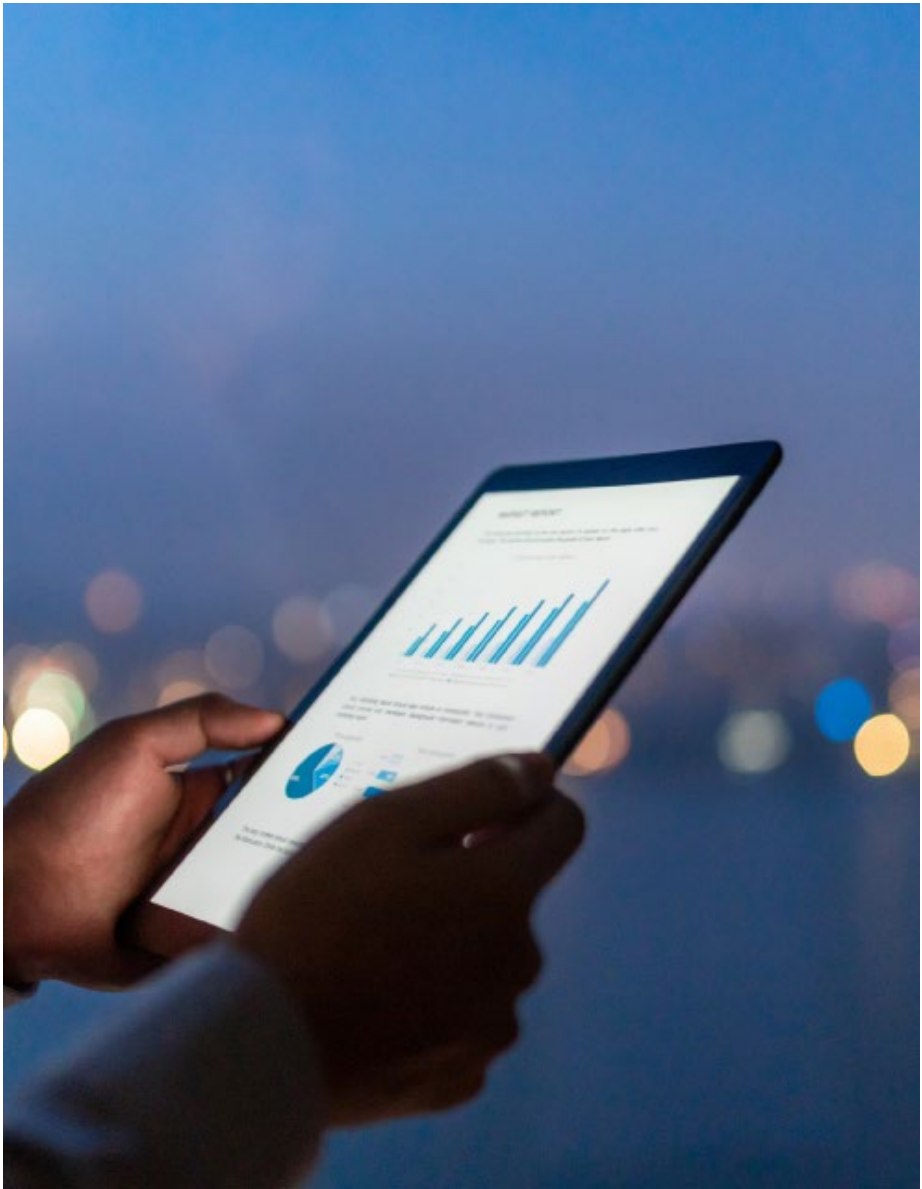
# Business Technology Services

**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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# Objectives

1. Describe recent Solver product updates & enhancements
2. Discuss how Solver's xFP&A platform supports improved planning & reporting
3. Evaluate how artificial intelligence (AI) is being integrated to drive efficiency & insight
4. Identify Solver's road map priorities for the coming year





# Agenda

1. Solver Introduction
2. Solver Through the Year
3. The Road Map



# 01

## Solver Introduction



# 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





# 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

## Solver Through the Year



# January

## New Features & Enhancements

- Data Warehouse
  - Enhanced user experience when using filters in Data Explorer
  - Added a standardized error message for users to experience when having issues manually authenticating their Business Central account
- Administration
  - Added the contributor license type
  - Changed the license distribution process for administrators
- QuickStarts for Fixed Assets & Personnel

# License Distribution Before & After

## Before

OverviewCompaniesUsersRolesLicensing

All features of Solver are now included within our User and Viewer licenses. [Read more](#)

User	Data Warehouse	Planning	Report Archive Viewers (0 / 99)	Report Designer	Reporting Users (3 / 63)
Andrew Gross	✓	✓	✓	✓	✓
Jared West (Solver)	✓	✓	✓	✓	✓
Michael Gross	✓	✓	✓	✓	✓

## After

MG Michael Gross Dry-It Inc.

Manage licenses and control feature access via permissions in the Users section [Find out more](#)

OverviewCompaniesUsersRoles

Search or add user  
Enter email address

Andrew Gross

AG Andrew Gross

JJ Jared West

MG Michael Gross

License

Standard (80 available)

Standard (80 available)

F Contributor (0 available)

F Viewer (99 available)

Unlicensed

Data access

# February

## New Features & Enhancements

- Planning – Fixes language translation in workflow notifications
- Reporting – Support deleting multiple reports from a playlist
- Data Warehouse
  - Business Central connector – added retry when API request is blank
  - Add sort capabilities to Data Explorer
  - Only one Rule can be imported at a time
  - Data Explorer will show up to 16 digits for numeric fields



# Data Warehouse Column Sorting

←

DATA EXPLORER Browse and filter through GP General Ledger Detail

Filter ▾

Drag Column Header to create a filter

APPLY CLEAR

☐ Select All

↔

🗑

Click a column header to sort the data

Displaying 10000 rows

Transaction ID	Category	Currency	Entity	GP Account	GP Account String ▲	GP Department	GP Division	Line Details	Period	Scenario	Customer in Trx	Distribution Reference	Journal Entry	Last Date Edited
HISTORY-6	MAIN		TWO	1100	000-1100-00	00	000		202401...	OBA			1	12/30/2024 06:00
HISTORY-6480	MAIN		TWO	1100	000-1100-00	00	000		202501...	ACT		Cash	1192	12/30/2025 06:00
HISTORY-6482	MAIN		TWO	1100	000-1100-00	00	000		202501...	ACT		Cash	1193	12/30/2025 06:00
HISTORY-6484	MAIN		TWO	1100	000-1100-00	00	000		202501...	ACT		Cash	1194	12/30/2025 06:00
HISTORY-9841	MAIN		TWO	1100	000-1100-00	00	000		202501...	OBA			3455	12/30/2025 06:00
HISTORY-10035	MAIN		TWO	1100	000-1100-00	00	000		202603...	ACT		Cash	880	12/30/2026 06:00
HISTORY-10041	MAIN		TWO	1100	000-1100-00	00	000		202603...	ACT		Cash	883	12/30/2026 06:00

# March

## New Features & Enhancements

- Display Template Description to Information Page
- Enable Storage Errors When Saving
- Added Job Details to Event Log
- Support for Okta authentication



# April

## New Features & Enhancements

- Custom Drilldown
  - Users can now customize the drilldown window in Solver
  - Each module's drilldown window can be modified; users must have permission to modify the drilldown window
  - Users must have the “Can customize drilldown” permission
- Business Rules Editor
  - Users can edit business rules within Solver instead of importing them
  - Rules can still be imported

# Custom Drilldown

**CUSTOM DRILLDOWN** Customize the fields and column order in your report drilldowns

Modules

General Ledger

General Ledger

General Ledger Detail

Line Item Details

Accounts Payable

Accounts Receivable

Capital

Payroll

Narrative Reporting

Google Analytics

Decision Advisor

Travel

Strategy

Benchmarking

Projects

Revenues

Stats

GP General Ledger Summ...

GP General Ledger Detail

GP Payroll Details

GP Payables

Inventory

BC GL Detail

Sales

Fields

> Account

> Category

> Corresponding Entity

> Currency

> Department

> Entity

> Line Details

> Period

> Scenario

> Source System

Additional Data

Journal Entry Number

Original Posting Date

Originating Document Number

Originating Master Number

Period

RowComment

Series

Transaction Description

Variance Comments

Vendor ID

Σ Annual Amount

Σ Monthly Amount

Σ Other Amount

Column Order

Period

Currency

Currency Description

Currency

Scenario

Scenario Description

Scenario

Entity

Entity Description

Entity

Account

Account Description

Account

Category

Category Description

Category

Department

Department Description

Department

Source System

Source System Description

Source System

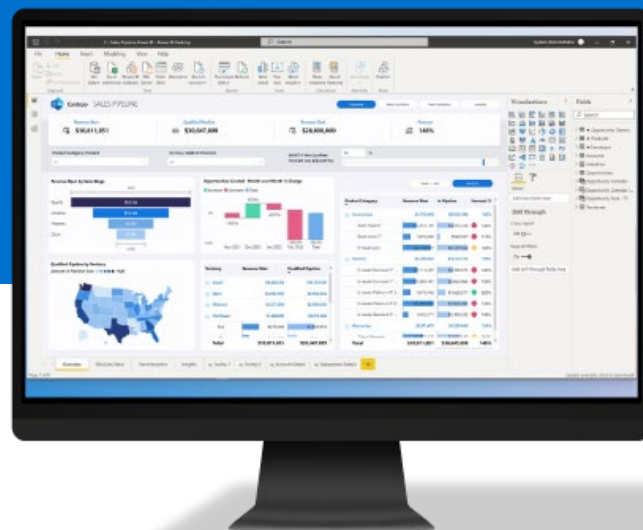
Line Details

Line Details Description

Line Details

# Demo

Microsoft  
Partner



# May

## New Features & Enhancements

- May 7
  - Added Support for AP & AR in QuickStart for Sage Intacct
  - Updated the User Interface to Align Objects
- May 16
  - Added the ability for users to save instead of immediately running a QuickStart job
  - Added the ability for users to configure the authority server for Okta authentication in Solver
  - Solver system messaging to improve the notification experience for users with more in-app notifications in the future



# June

## New Features & Enhancements

- June 3
  - Publisher Warning Related to Unlicensed Users
  - Updated wording on permissions in administration menus
  - Zendesk Delta Data Load
  - Added Scenario & Category for AR & AP Business Central QuickStart integrations
- June 20 – next page >>

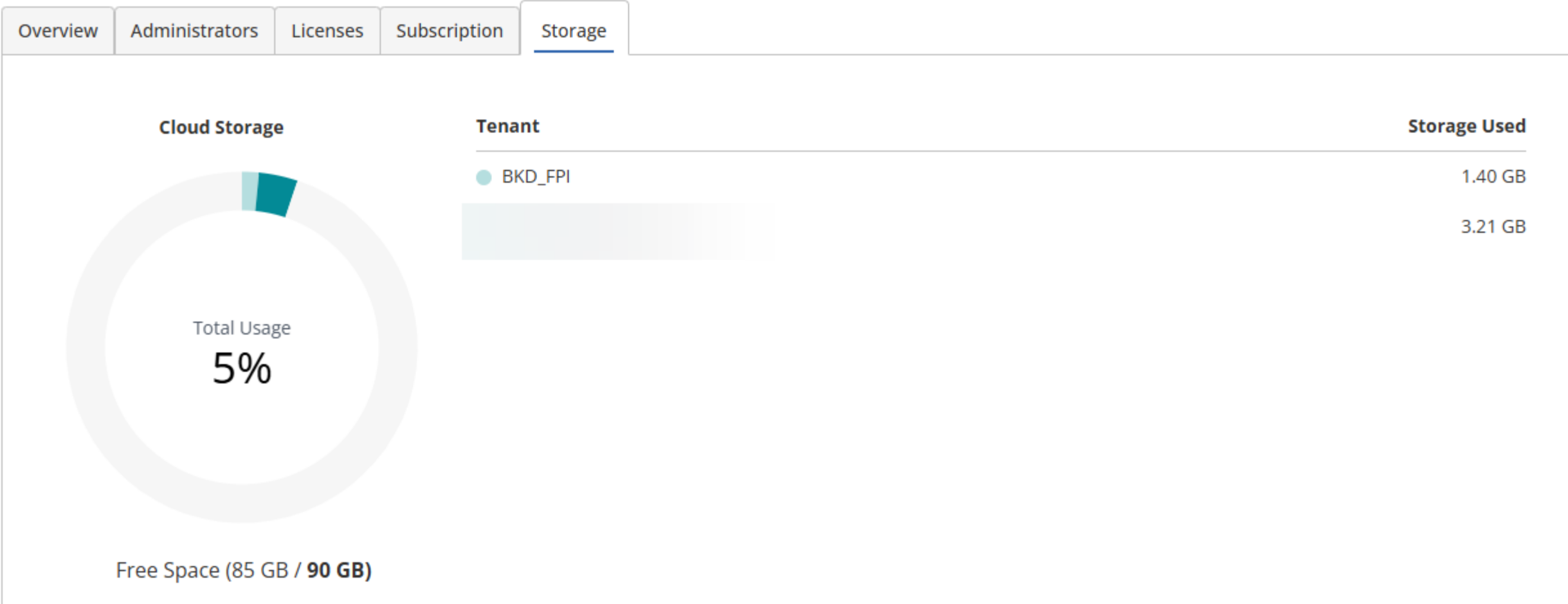
# June

## New Features & Enhancements

- June 20
  - Minor Font Updates
  - Improved Validation for Rules
  - Delta Load Added to Salesforce
  - New Storage Menu in the Administrative Settings
  - Storage Warning Notification
  - Additions to Workflow



# Storage Information



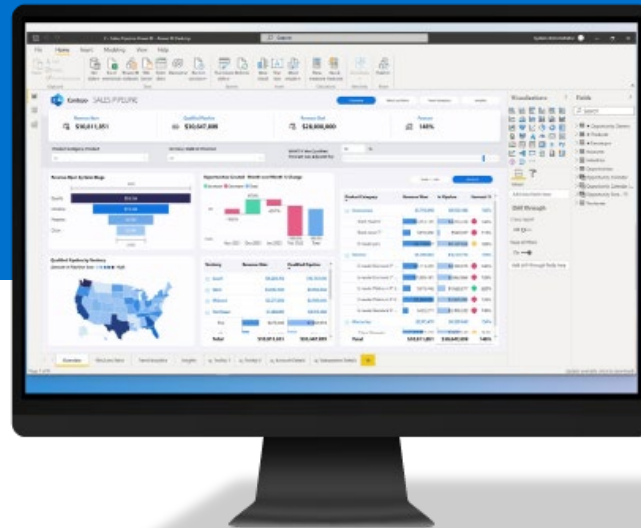
# July

## New Features & Enhancements

- July 25
  - Redesigned Workflow Status page
    - User interface continuity
    - Assignment cards
    - Information tab
  - Personalized Welcome Email for new users
  - Updates to Connectors
    - Business Central v1 when using filters
    - Sage Intacct connector when using filters

# Demo

Microsoft  
Partner



# August

## New Features & Enhancements

- August 22
  - Ad Hoc Reporting
  - Removed Unnecessary Buttons from dropdown menus
  - Data Warehouse Interface Improvements
  - Improved Rule Editor User Interface



# September

## New Features & Enhancements

- September 19
  - New Tool Tips for Categories
  - Storage Warning Email Notification
  - Entra ID & Okta Reset for Individual Users



# October

## New Features & Enhancements

- October 10
  - Connector Version Updates for Business Central v1 & v2
  - Connector Version Update for NetSuite
- October 24
  - New Connectors
  - Upgraded Report Rendering Service

# November

## New Features & Enhancements

- November 21
  - Solver Copilot Update
  - New Connector Name Tool Tips





# December

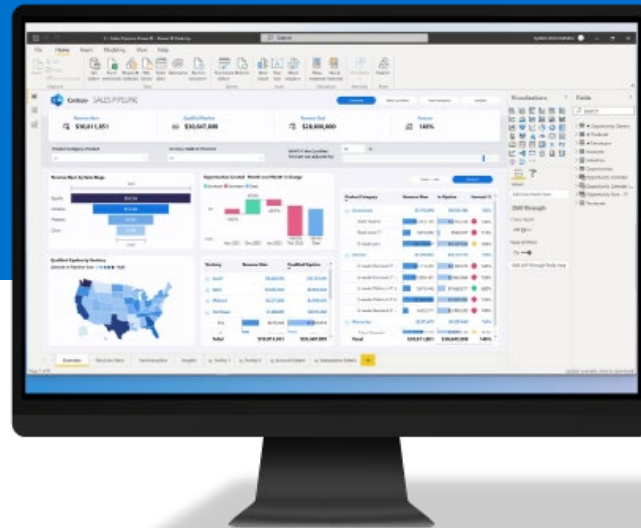
## New Features & Enhancements

- Data Explorer Filter Enhancements
- Rollup Data Enforcement
- Copilot Improvements



# Demo

Microsoft  
Partner





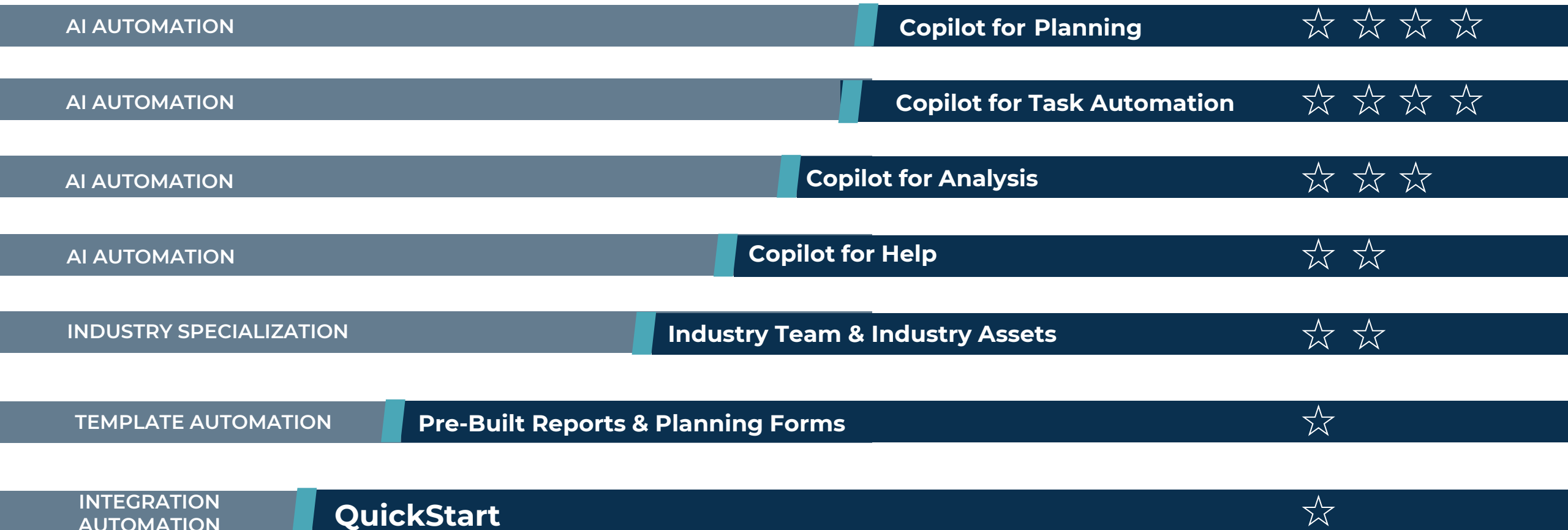
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## The Road Map





# Solver's Preparation for the Future



# The Pillars of Solver's AI Strategy

## **Solver Copilot**

The experience layer

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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

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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

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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

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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

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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

## SHIPPING 2025

 Copilot v2 (Data)

 Fabric Connector

 Solver → Solver Connector

 New Power BI Connector

 More Connectors

 New Integration Engine

 Self Service Tasks

 +Enhancements

## IN PROGRESS

 Connector Studio

 Copilot Agents

 Contributor includes Ad Hoc

 Industry Specific QuickStarts

# Longterm 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

# Q&A



Business  
Technology  
Services

## Questions?

# Contact

## Forvis Mazars



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