

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

December 2025

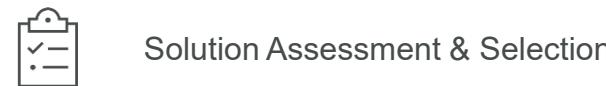
forv/s
mazars

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.

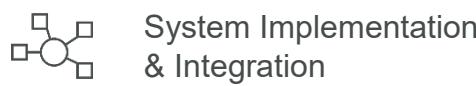
Our end-to-end technology solutions & managed services help clients achieve their digital transformation goals. Services include:



Solution Assessment & Selection



Implementation Project Rescues



System Implementation & Integration



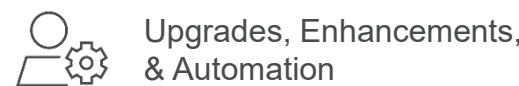
Business Intelligence (BI) & Analytics



Process & Technology Design



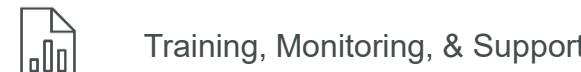
Robotic Process Automation (RPA)



Upgrades, Enhancements, & Automation



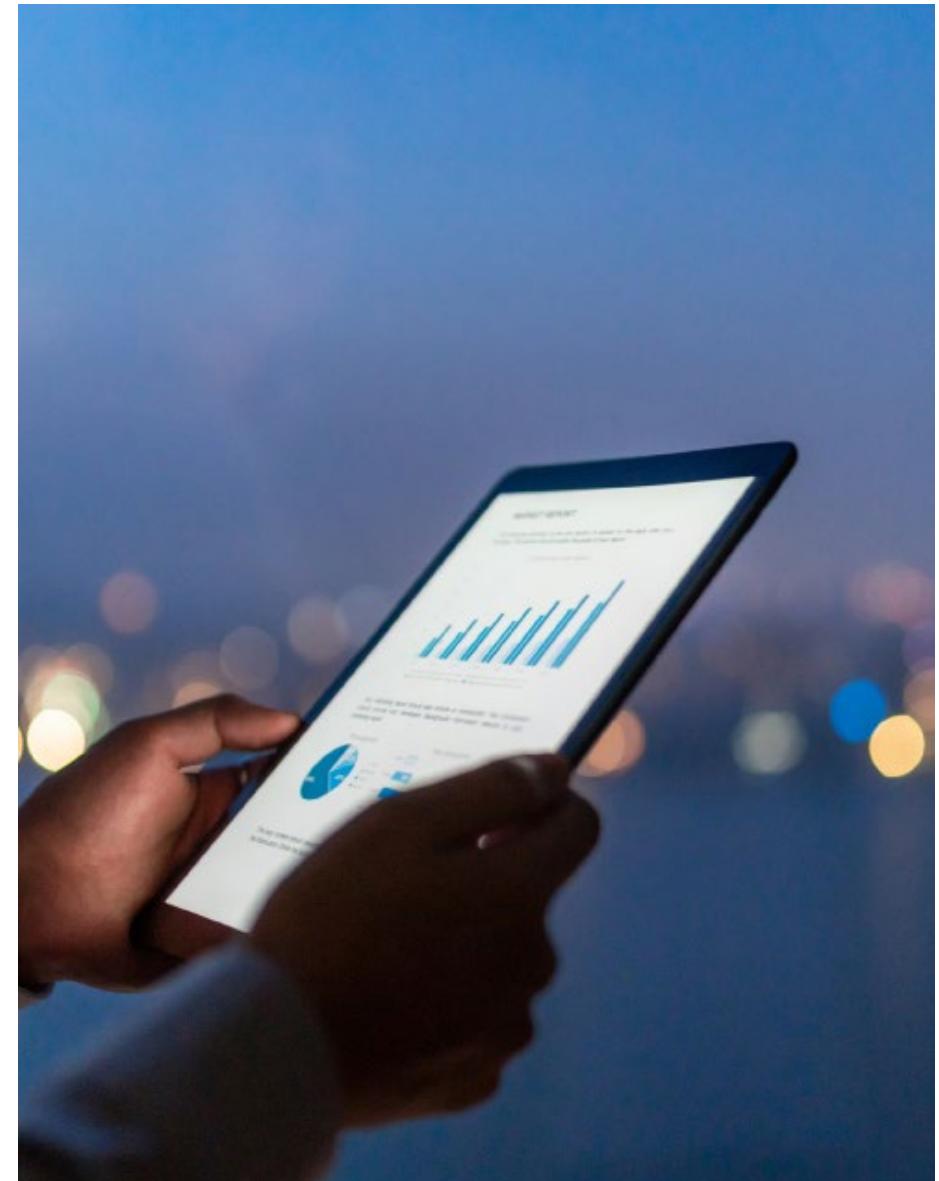
Custom Application Development



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



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

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

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

charles.allen@us.forvismazars.com

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





EVERY USER
RECEIVES

SOLVER SUITE

REPORTING

PLANNING

**DATA
WAREHOUSE**

Pre-built
Configurable
Connectors

Financial & Operational
Consolidations
Dashboards

Budgeting
Forecasting
What If Analysis

Security
Scalability

AZURE CLOUD

eLEARNING

On-demand
Certifications

MARKETPLACE

100+
Ready-to-use
Templates

02

Solver Through the Year



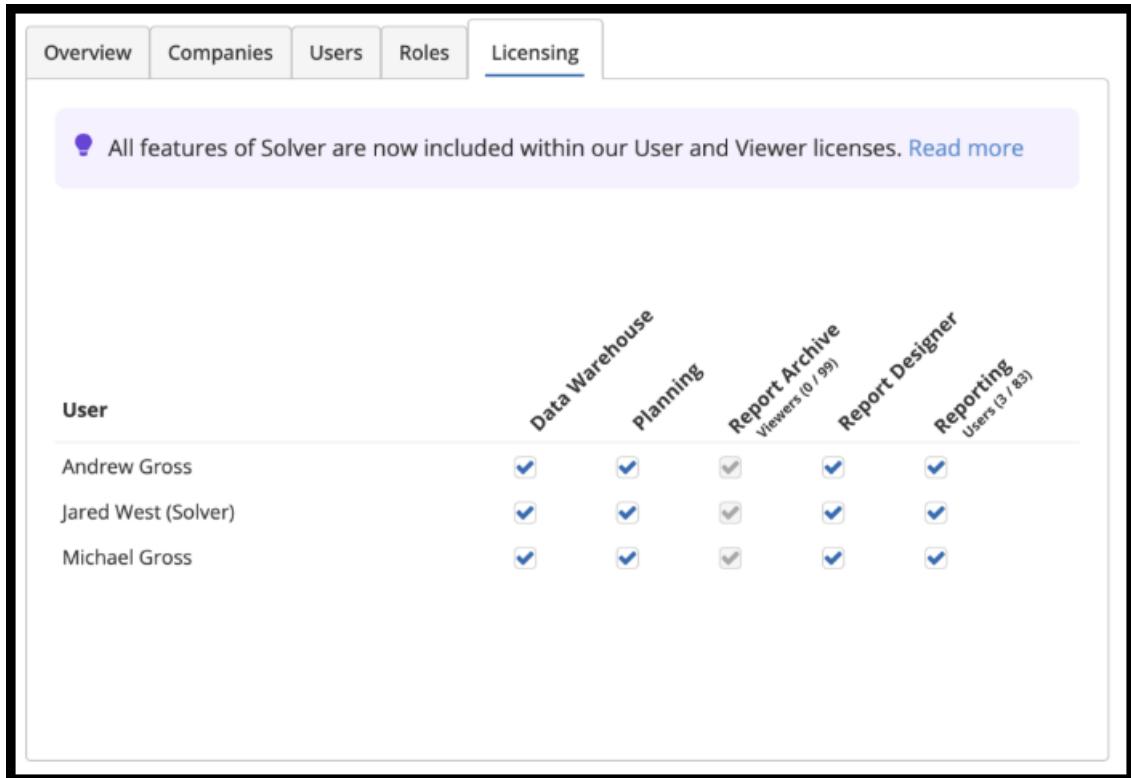
January

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

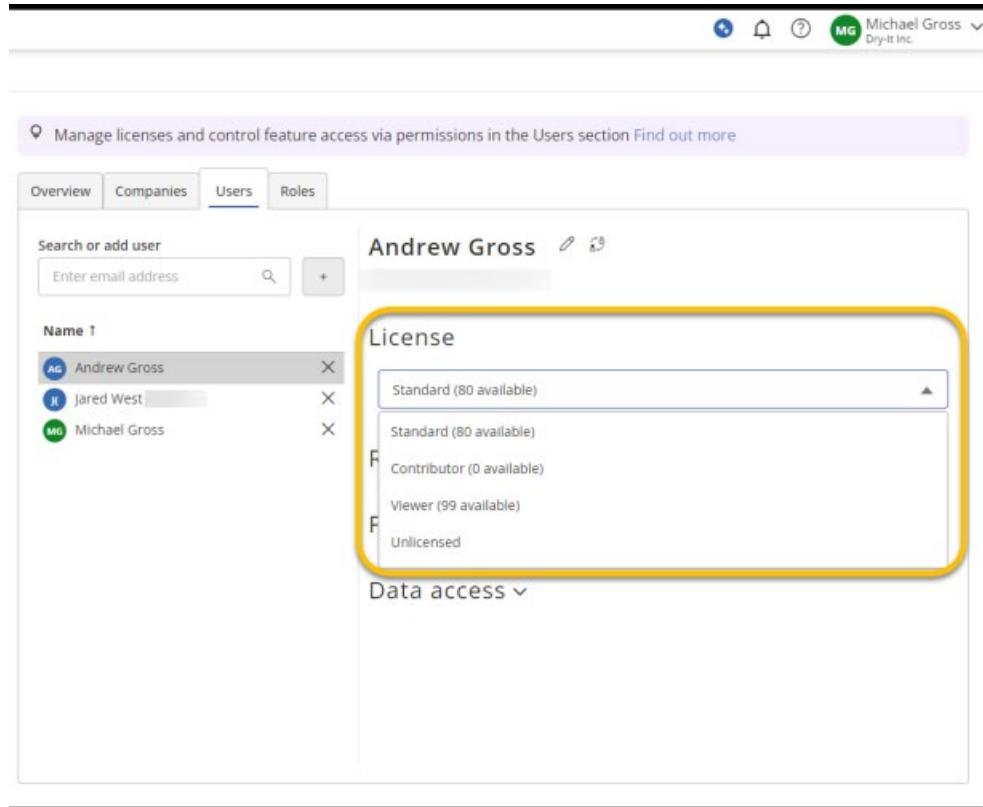


Overview Companies Users Roles Licensing

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

User	Data Warehouse	Planning	Report Archive	Report Designer	Reporting
Andrew Gross	✓	✓	✓	✓	✓
Jared West (Solver)	✓	✓	✓	✓	✓
Michael Gross	✓	✓	✓	✓	✓

After



Overview Companies Users Roles

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

Andrew Gross

Name 1

AG Andrew Gross	X
JW Jared West	X
MG Michael Gross	X

License

- Standard (80 available)
- Contributor (0 available)
- 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



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

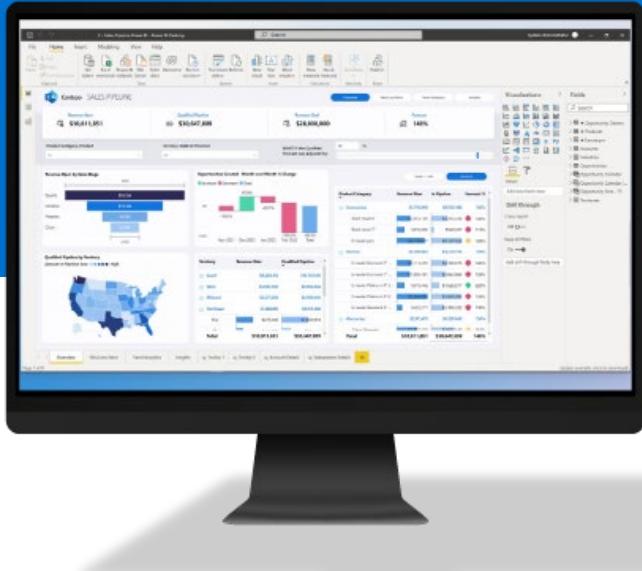
CUSTOM DRILLDOWN Customize the fields and column order in your report drilldowns

The screenshot displays the 'Custom Drilldown' feature with three main panels:

- Modules:** A list of available modules including General Ledger, General Ledger Detail (selected), 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, and Sales.
- Fields:** A list of fields categorized by module. The 'General Ledger Detail' module is selected, showing fields like Account, Category, Corresponding Entity, Currency, Department, Entity, Line Details, Period, Scenario, Source System, and various transaction and document-related fields. Some fields have checkboxes next to them, indicating they are selected for the drilldown.
- Column Order:** A list of columns showing the order of fields in the report. The columns are grouped by module: Period (Currency), Currency Description (Currency), Scenario (Scenario), Scenario Description (Scenario), Entity (Entity), Entity Description (Entity), Account (Account), Account Description (Account), Category (Category), Category Description (Category), Department (Department), Department Description (Department), Source System (Source System), Source System Description (Source System), Line Details (Line Details), and 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 >>

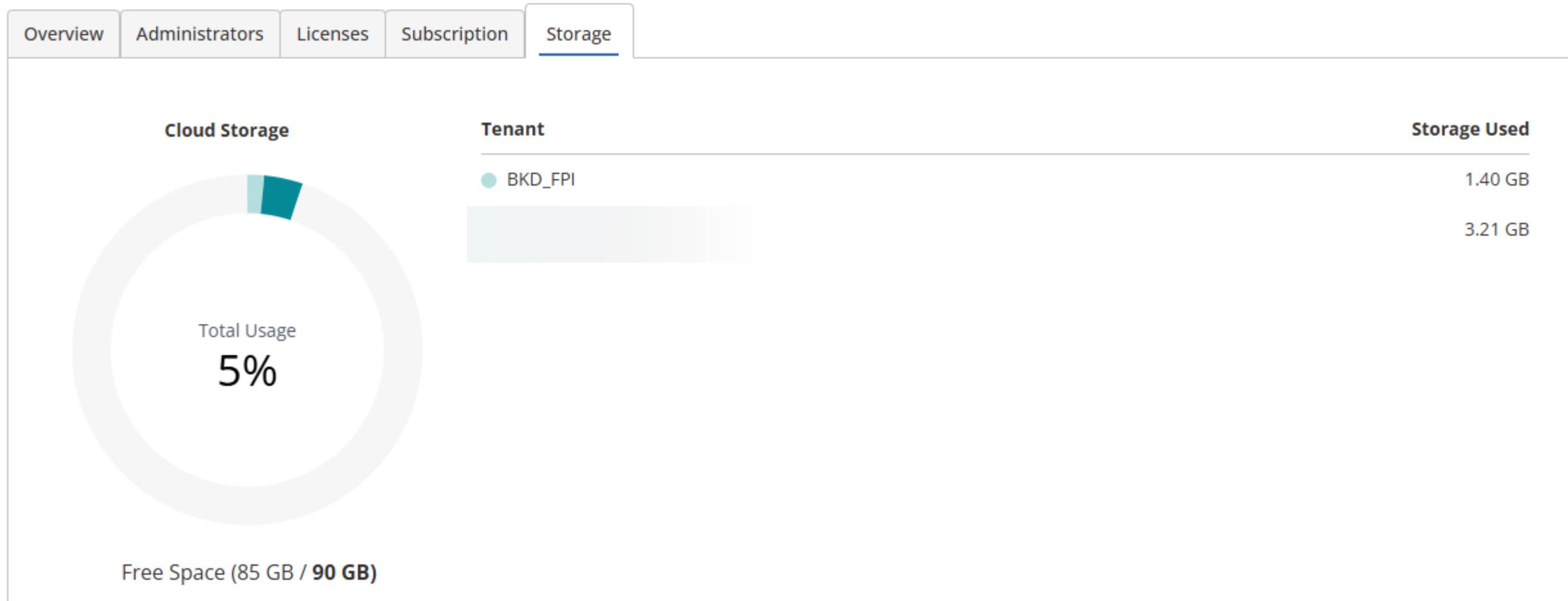
June

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



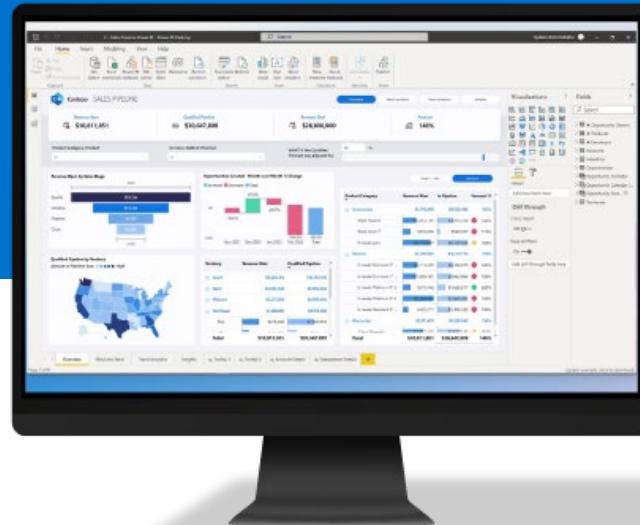
July

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

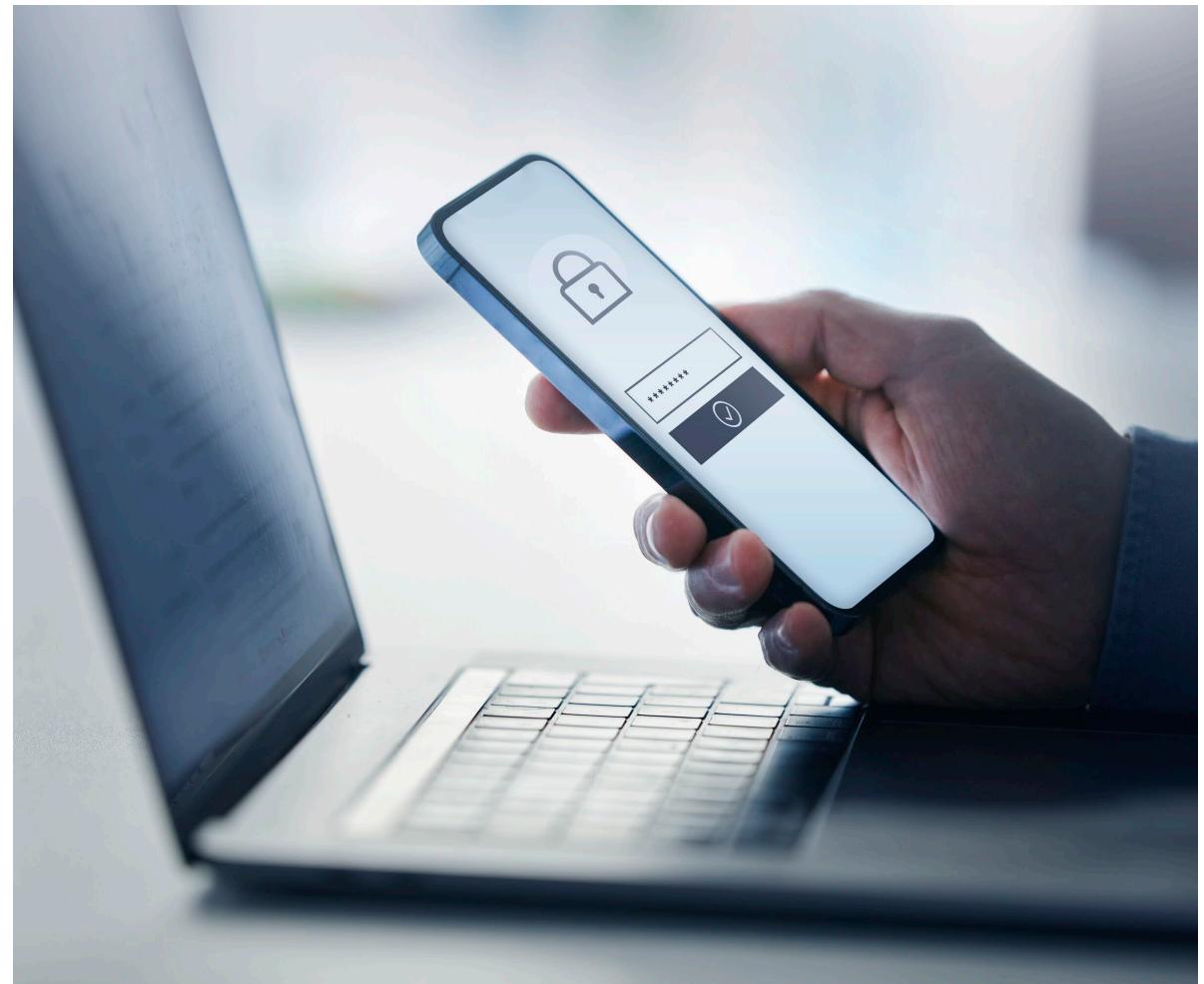
New Features & Enhancements

- 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

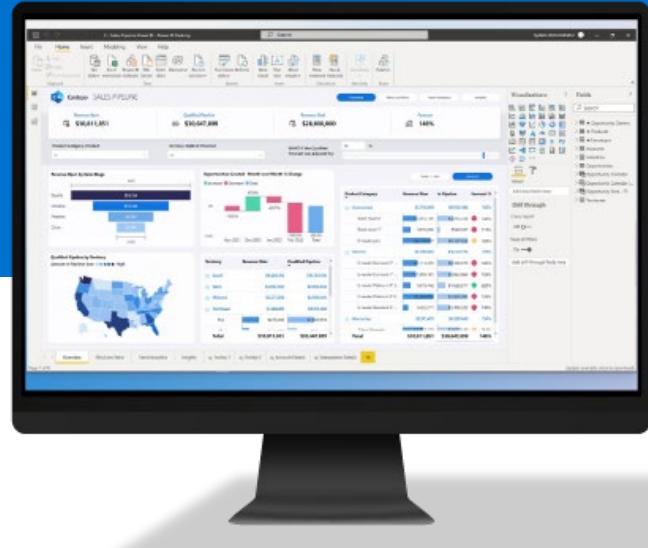
New Features & Enhancements

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



Demo

Microsoft
Partner



03

The Road Map



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



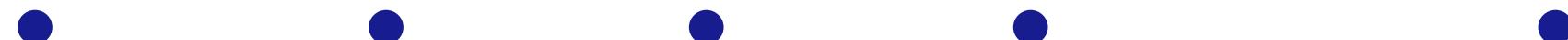
TEMPLATE AUTOMATION

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

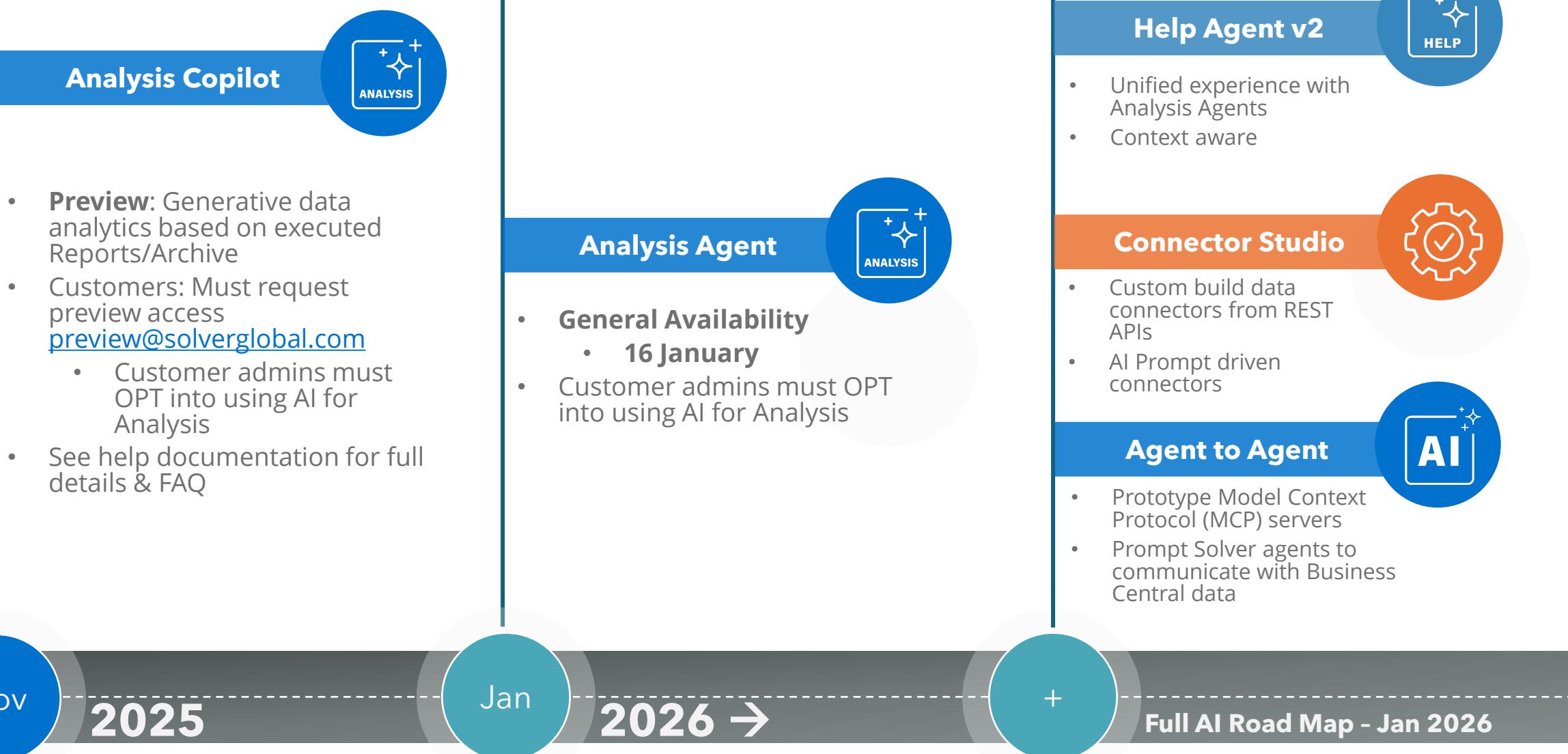
The single source of truth where data comes together. Solver connects with virtually any data source, including leading ERPs, to deliver consolidated, AI-powered insights.

Authentic Intelligence

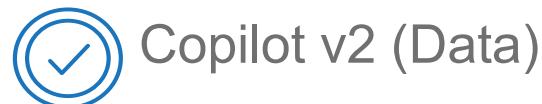
Our guiding philosophy

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



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

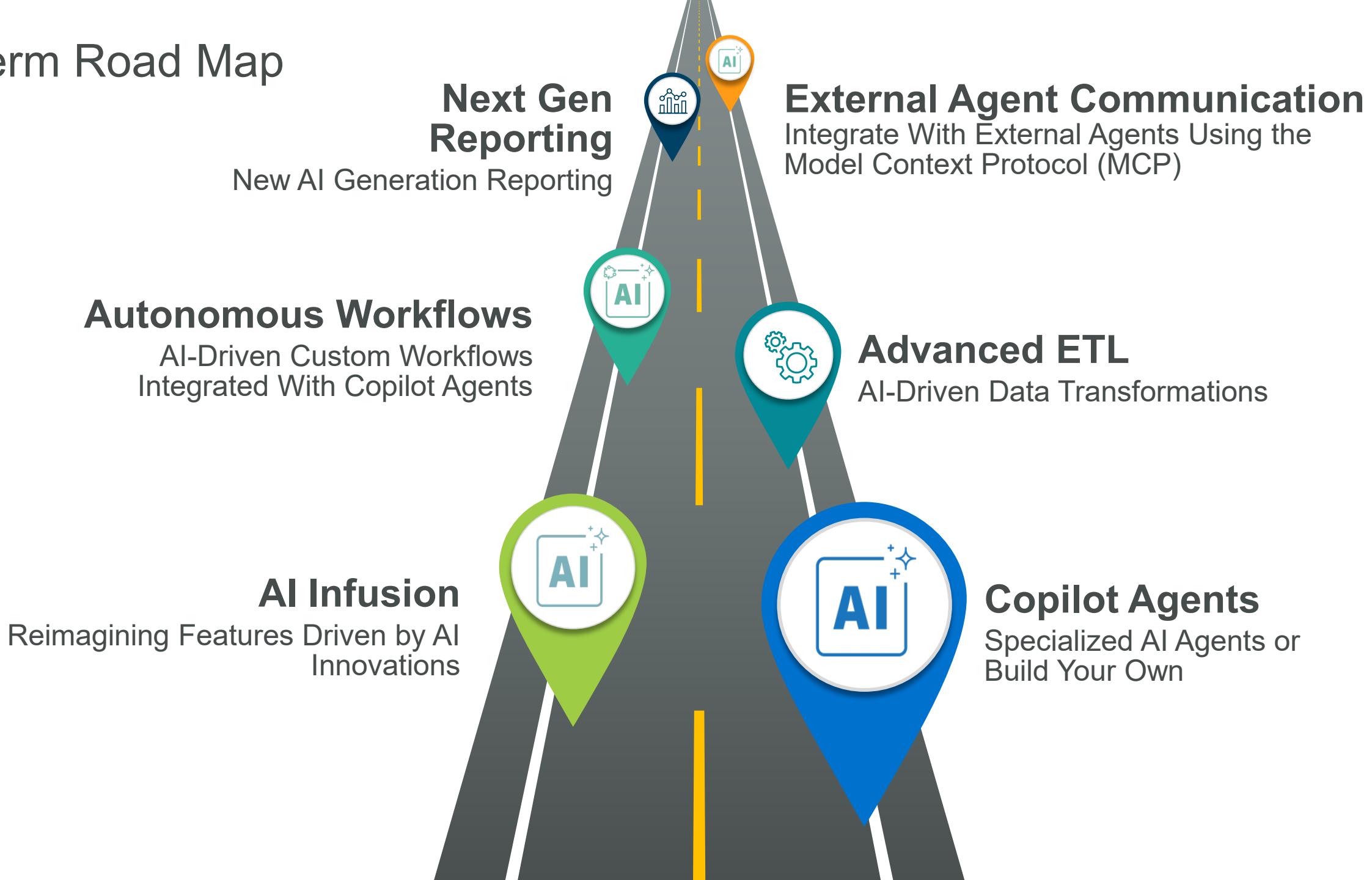


Contributor includes
Ad Hoc



Industry Specific
QuickStarts

Longterm Road Map





Business
Technology
Services

Questions?

Contact

Forvis Mazars



Charles Allen

Senior Managing Consultant

charles.allen@us.forvismazars.com

The information set forth in this presentation contains the analysis and conclusions of the author(s) based upon his/her/their research and analysis of industry information and legal authorities. Such analysis and conclusions should not be deemed opinions or conclusions by Forvis Mazars or the author(s) as to any individual situation as situations are fact-specific. The reader should perform their own analysis and form their own conclusions regarding any specific situation. Further, the author(s)' conclusions may be revised without notice with or without changes in industry information and legal authorities.

© 2025 Forvis Mazars, LLP. All rights reserved.