



# Solver FP&A: A Year in Review

December 17, 2024

# Global Presence

**Top 10**

Global Network\*

**\$5bn**

Combined Revenue (2023)

**100+**

Combined Countries & Territories

**400+**

Combined Offices & Locations

**1,800+**

Combined Partners

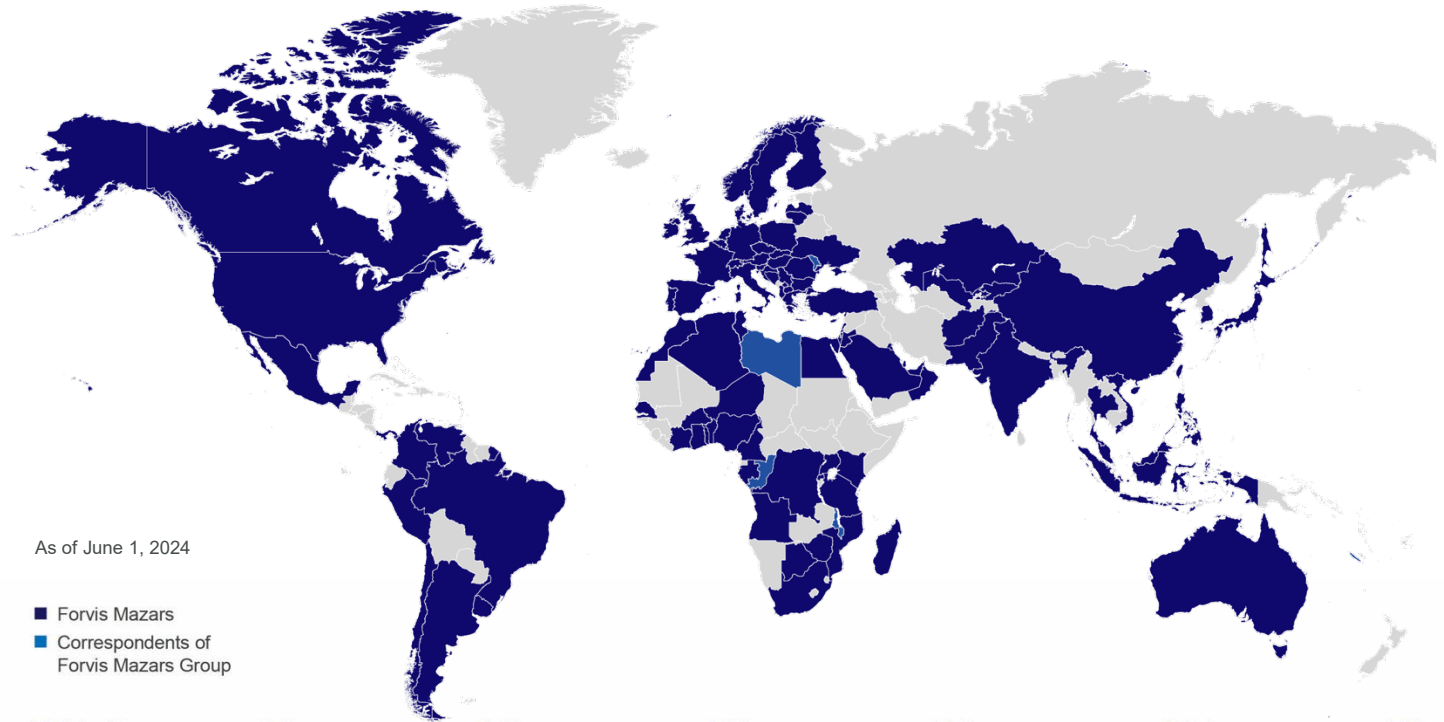
**40,000+**

Combined Employees

\* Source: IAB World Network rankings, based on most recent rankings

2023 revenues: FORVIS \$1.7bn (€1.6bn), Mazars (expected) \$3bn (€2.8bn)

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars, LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories.



As of June 1, 2024

- Forvis Mazars
- Correspondents of Forvis Mazars Group

- |                          |  |              |              |                   |                |                        |
|--------------------------|--|--------------|--------------|-------------------|----------------|------------------------|
| ■ Afghanistan            | ■ Cameroon                               | ■ France     | ■ Korea      | ■ Morocco         | ■ Qatar        | ■ Togo                 |
| ■ Albania                | ■ Canada                                 | ■ Gabon      | ■ Kosovo     | ■ Mozambique      | ■ Romania      | ■ Tunisia              |
| ■ Algeria                | ■ Cayman Islands                         | ■ Germany    | ■ Kuwait     | ■ Netherlands     | ■ Rwanda       | ■ Türkiye              |
| ■ Angola                 | ■ Chile                                  | ■ Ghana      | ■ Kyrgyzstan | ■ New Caledonia   | ■ Saudi Arabia | ■ Uganda               |
| ■ Argentina              | ■ China                                  | ■ Greece     | ■ Latvia     | ■ Niger           | ■ Senegal      | ■ Ukraine              |
| ■ Australia              | ■ Colombia                               | ■ Hong Kong  | ■ Lebanon    | ■ Nigeria         | ■ Serbia       | ■ United Arab Emirates |
| ■ Austria                | ■ Congo                                  | ■ Hungary    | ■ Libya      | ■ North Macedonia | ■ Singapore    | ■ United Kingdom       |
| ■ Bahrain                | ■ Côte d'Ivoire                          | ■ India      | ■ Lithuania  | ■ Norway          | ■ Slovakia     | ■ United States        |
| ■ Belgium                | ■ Croatia                                | ■ Indonesia  | ■ Luxembourg | ■ Oman            | ■ Slovenia     | ■ Uruguay              |
| ■ Benin                  | ■ Cyprus                                 | ■ Ireland    | ■ Madagascar | ■ Pakistan        | ■ South Africa | ■ Uzbekistan           |
| ■ Bermuda                | ■ Czech Republic                         | ■ Israel     | ■ Malawi     | ■ Palestine       | ■ Spain        | ■ Venezuela            |
| ■ Bosnia and Herzegovina | ■ Democratic Republic of the Congo (DRC) | ■ Italy      | ■ Malaysia   | ■ Panama          | ■ Sweden       | ■ Vietnam              |
| ■ Botswana               | ■ Denmark                                | ■ Japan      | ■ Malta      | ■ Peru            | ■ Switzerland  | ■ Zimbabwe             |
| ■ Brazil                 | ■ Egypt                                  | ■ Jordan     | ■ Mauritius  | ■ Philippines     | ■ Taiwan       |                        |
| ■ Bulgaria               | ■ Finland                                | ■ Kazakhstan | ■ Mexico     | ■ Poland          | ■ Tanzania     |                        |
| ■ Burkina Faso           |  | ■ Kenya      | ■ Moldova    | ■ Portugal        | ■ Thailand     |                        |



# Business Technology Services

Forvis Mazars provides enterprise resource planning (ERP) & customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, & support services.

Our end-to-end solutions help clients achieve their digital transformation goals by:

- Creating effective processes & strategies for future operations
- Designing & implementing modern operational systems
- Reviewing new business-facing technologies
- Leveraging existing investments in legacy technologies
- Integrating data solutions



# Business Technology Services

## ERP

Microsoft Dynamics 365	
Finance	Supply Chain
Commerce	Project Operations
Business Central	Dynamics GP
NetSuite	
Sage & Sage Intacct	
Trimble Viewpoint Spectrum & Vista	

## 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

Sage Partner

salesforce PARTNER

solver

forvis  
mazars

# Today's Presenters

Business Technology Services Practice

**“Our team is focused on delivering an Unmatched Client Experience<sup>®</sup> on every engagement.”**

– Chad Back, Partner



**Charles Allen**

Senior Managing Consultant

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# Solver FP&A: A Year in Review

December 17, 2024



# Objectives

1. Demonstrate an understanding of Solver's latest updates
2. Explain how Solver's bug fixes & performance improvements enhance your software's efficiency & reliability
3. Describe Solver's road map for 2025 & new capabilities that are on the horizon



# Agenda

1. Reporting & Planning
2. Data Warehouse
3. General





# Solver Updates Schedule & Information

- Monthly release, usually the third weekend
- New or changed features, bug fixes, or both
- Mid-month releases for bug fixes due to the August update
- Release notes available for each month (<https://help.app.solverglobal.com/article-categories/release-notes/>)
- Status page (<https://status.app.solverglobal.com/>)
- 2025 release schedule (<https://help.app.solverglobal.com/knowledge-base/2025-solver-release-schedule/>)



# 01

## Reporting & Planning

New & changed features for reporting & planning



# Reporting & Planning

## New & Changed Features

- Ad Hoc Reporting (March & April)
  - Includes default filter including all values & NULL values
  - Added blank values to filters
  - Notification banner for lack of permissions to access a report's data
- Report Designer Updates (March & September)
- Chart rendering in Templates (May)
- Planning
  - Improved error messaging related to saving input form data (October)
  - Improved the storage speed in input forms (September)
- Ability to save reports as favorites (September)
- Enhanced periodcalc expression usage in Publisher (March)
- Storage comments button (March)





# Ad Hoc Reporting

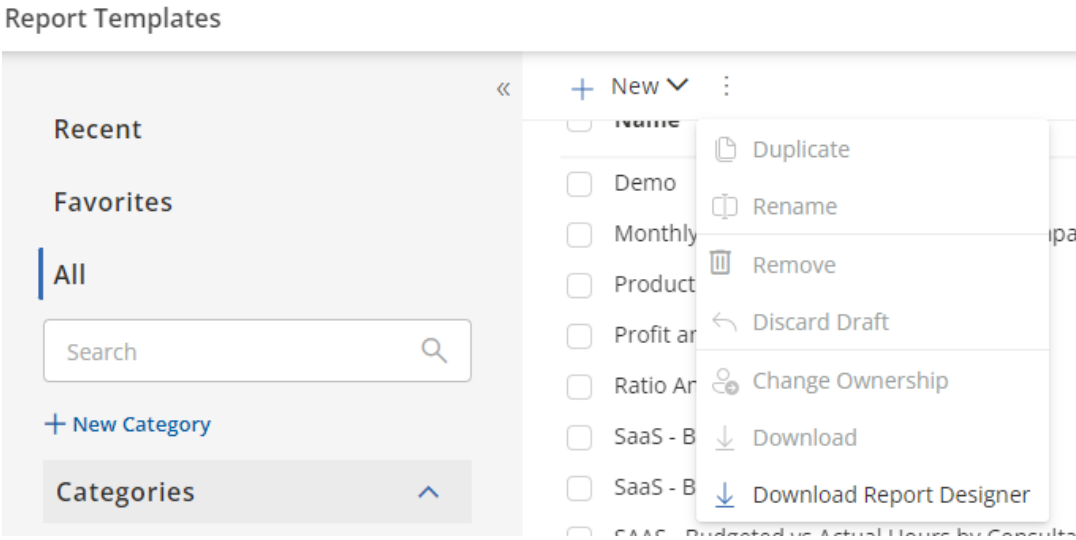
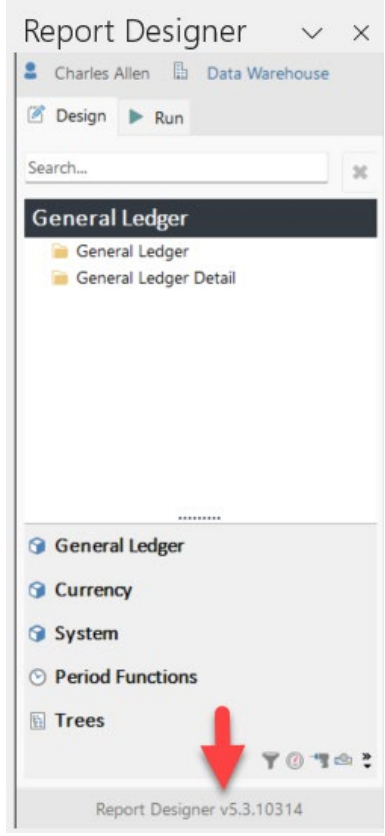
- Filters show null & all values by default
- Reports can be shared
- Reports can be marked as favorite

The screenshot displays the 'Ad Hoc Reporting > Sales Order Detail' interface. At the top, there are navigation options: 'Save', 'Export', 'Revert to saved', and a 'Pivot' toggle. The main report area shows a table with columns: 'Customer Description', 'TransactionID', 'Date', 'Product Description', and 'Extended'. The data rows include 'Advanced Tech Satellite System', 'Associated Insurance Company', 'Berry Medical Center', and 'Castle Inn Resort', followed by a 'Total' row. On the right, there are two panels: 'Filters' and 'Fields'. The 'Filters' panel includes: 'Period' (is This Period This Year), 'Category' (is MAIN), 'Currency' (is USD), 'Entity' (is SUS), 'Employee Description' (is Riley Cust), and 'Department' (Basic/Advanced tabs, with a search for '\*,null'). The 'Fields' panel shows a list of fields under the 'Revenues' module, with 'Extended Price' selected. At the bottom, it indicates 'Rows: 20', 'Row limit: 10,000', and a 'Refresh' button.

# Report Designer

## Finding the Version Number

- Necessary to keep Report Designer up-to-date
- You won't be able to create or modify reports
- Download from the Report or Planning Template windows



# Storage Comments

## Seeing the Cells With Storage Settings

- Displays comment fields for cells with storage settings
- Helps find storage settings causing problems

The screenshot shows the Solver Reporting interface in Excel. The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, View, Automate, Developer, Help, Solver Reporting, Acrobat, Engagement, and Power Pivot. The Solver Reporting tab is active, showing options like Auto Parameters, Layout Comments, Storage Comments, Options, and Help.

The report is titled "Report Designer" and is for "Charles Allen" in the "Data Warehouse". The report structure is as follows:

- Other Expenses
  - [Entity Description]
  - [Department Description]
  - [Scenario Description]
- Operating Expenses
  - [Account] [Account Description]
  - [Variance Comments] [Monthly Amount]
- Budget to Accounts with No History
- Accounts Budgeted on Other Forms
  - [Account] [Account Description]
- Total Expenses
- Total Expenses Last Year
- Total Expenses Budget
- Variance

The "Operating Expenses" section contains a table with columns: Account, Description, Dept Comment, Budget [FY], #VALUE! Total, Actual [FY], Forecast [FY], and #VALUE! Total. The "Monthly Amount" cell in the "Operating Expenses" section is highlighted in yellow, and a callout box shows its storage settings: "Cell F13 Storage: Monthly Amount [GL\_F\_Trans.Value1]". Other cells F17, F18, and F19 are also highlighted in yellow and have the same storage settings.



# Template Favorites

## Adds Them to the homepage

- Reports, Input Forms, & Ad Hoc Reports can be marked as favorites
- They display on the Homepage

The screenshot shows the Solver FP&A homepage for Charles Allen at Forvis Mazars. The page displays a list of favorite templates under the 'Favorites' tab. The list includes:

Name	Type
R112 - P&L - by Department by Month	Report Templates
B204 - Personnel	Input Templates
Department Salaries	Ad Hoc Reporting

Below the list, there are action buttons: + New, Edit in Report Designer, Unfavorite, Assign, Assignments, and Add to Category. A list of templates is shown with checkboxes, and the 'B204 - Personnel' template is selected and marked as a favorite with a yellow star. A red arrow points from the star to the 'Input Templates' type label in the table above.

# 02

## Data Warehouse

New & changed features in the data warehouse



# Data Warehouse

## New & Changed Features



- Data API (January)
- Integration engine performance improvements (October)
- Export button in Data Explorer (November)
- Code & description columns are frozen on the dimension list (January)
- Pop-up error message when adding an existing dimension code (January)
- Mapping of Remaining Amount to Value in AP & AR for Business Central QuickStart integrations (January)
- New & updated connectors for QB Online, Google Analytics, & Zendesk (January, February, & June)
- Currency maintenance screen updates (May & August)
- Updated Dynamics 365 Finance QuickStart interface (August)
- Updated handling for business rule importing (September)
- Updated the Business Central extension (November)
- Added support for statistical accounts, fixed assets, & job data in Business Central (November)



# Data Explorer

## Updated UI & New Export Option

- Export option presented as arrow
- Select All option
- Grid-style display

DATA EXPLORER Browse and filter through General Ledger Detail HIDE FILTER ^

Drag Column Header to create a filter

REFRESH RESET

Select All | |→| |🗑️ Displaying 3110 rows

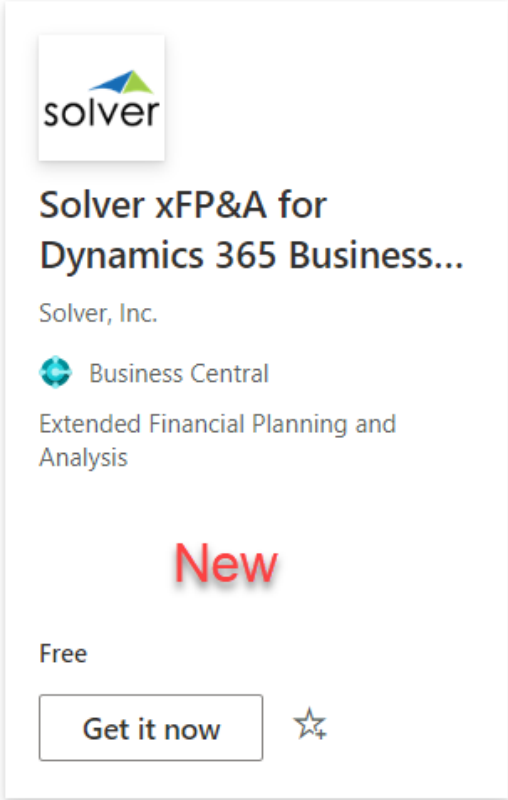
Transaction ID	Account	Category	Corresponding Entity	Currency	Department	Entity	Line Details	Period	Scenario	Source System	Additional Data	Journal Entry Number	Original
10050	11100	MAIN		HKD	000	SAS		202109...	ACT				
10050	50010	MAIN		HKD	300	SAS		202109...	ACT				
10050	21100	MAIN		HKD	000	SAS		202109...	ACT				
11030	11100	MAIN		HKD	000	SAS		202109...	ACT				
11030	50010	MAIN		HKD	300	SAS		202109...	ACT				
11030	21100	MAIN		HKD	000	SAS		202109...	ACT				
11700	11100	MAIN		HKD	000	SAS		202109...	ACT				
11700	50010	MAIN		HKD	300	SAS		202109...	ACT				
11700	21100	MAIN		HKD	000	SAS		202109...	ACT				
12670	11100	MAIN		HKD	000	SAS		202109...	ACT				
12670	50010	MAIN		HKD	300	SAS		202109...	ACT				
<b>Totals</b>													




# Business Central Extension Old & New Versions

- Uninstall the CPM version when an integration is not running
- Install the new xFP&A version



  
**Solver CPM for Dynamics 365 Business Central**  
Solver, Inc.  
 Business Central  
Advanced Planning and Reporting - Corporate Performance Management (CPM)  
★ 4.8 (4 ratings)  
Free  
[Get it now](#) 



  
**Solver xFP&A for Dynamics 365 Business...**  
Solver, Inc.  
 Business Central  
Extended Financial Planning and Analysis  
**New**  
Free  
[Get it now](#) 

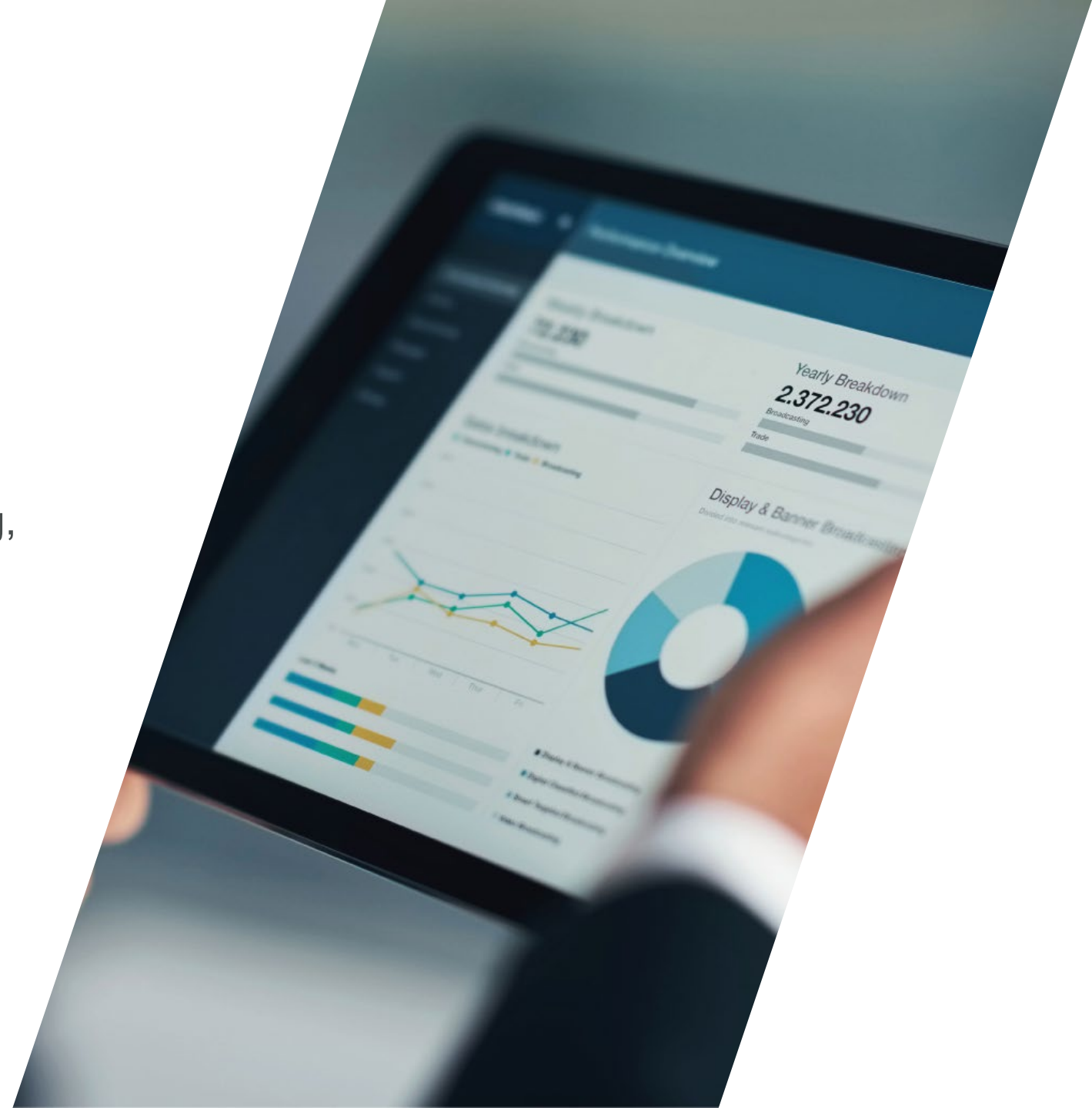
# Demo



# 03

## General

Updates to the system other than reporting, planning, & the data warehouse





# General & Administrative New & Changed Features



- Homepage redesign (September)
- Solver Copilot for getting help (October)
- Solver Academy single sign-on (October)
- Improved site responsiveness & resiliency (August)
- Updated icon for loading items, like reports (August)
- Enhanced tenant creation process for customer administrators (June)
- Security updates
  - Two-minute idle timeout (August)
  - Inability to log into different tenants from different browsers (August)
  - Requirement for users to log out and in to see permission & license changes (August)
  - Ability to enter any email address on the login window (August)

# New Portal Deployment

- Introduced to the U.S. in August
- Several benefits
  - Migration to .net
  - Takes advantage of Kubernetes (<https://kubernetes.io/>)
  - Allows for faster implementation of new features
  - More agile for development
  - Slight performance improvement



# Homepage Not New, But Improved

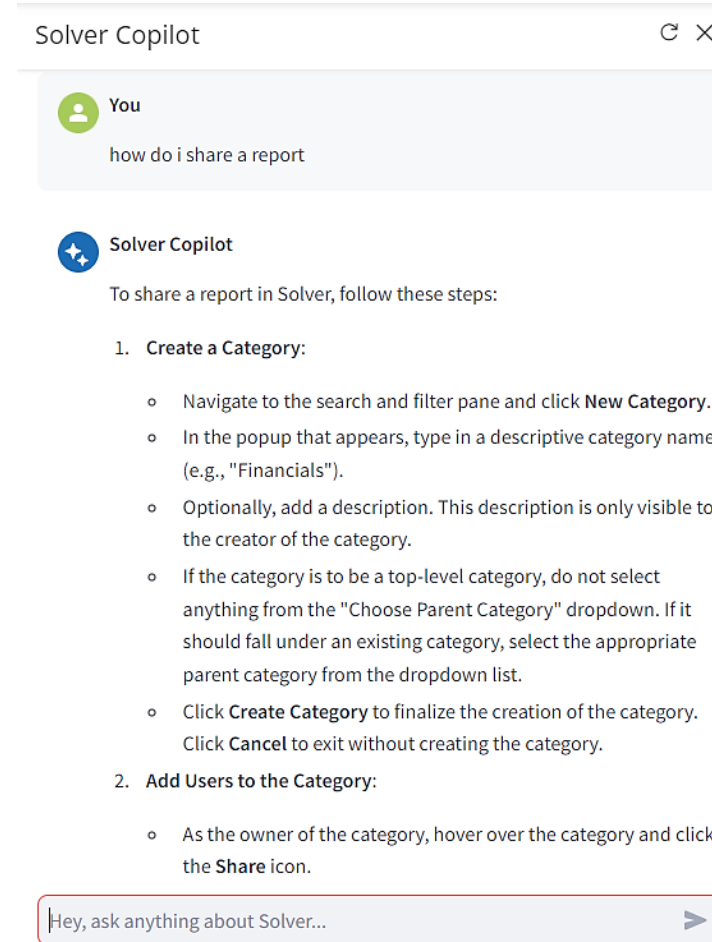
- Displays recent & favorite items
- Visible announcements
- Copilot icon

The screenshot shows the Solver FP&A homepage. At the top left is the 'solver' logo. The main header area displays 'Home' and 'BKD\_FPI' with a personalized greeting: 'Good evening, Charles Allen'. A navigation sidebar on the left is divided into 'REPORTING' (Report Templates, Publisher, Report Archive) and 'PLANNING' (Input Templates, Input Flow, Workflows, Assignments) sections, with 'Data Warehouse' and 'Settings' at the bottom. The main content area features an 'Activity' section with a 'Solver Announcement' card about a scheduled update for US Production on Friday, 22 November. Below this is a 'Recent Favorites' section containing a table of items.

Name	Last Opened	Type
Demo	6 minutes ago	Report Templates
SAAS - Budgeted vs Actual Hours by Consultant	Aug 27, 2020	Report Templates
Headcounts	Aug 25, 2020	Input Templates
SAAS - Budgeted vs Actual Hours by Project	Aug 25, 2020	Report Templates
SaaS - Income Statement	Aug 25, 2020	Report Templates

# Solver Copilot Get Help

- Provides an interactive help system
- Searches across the support site



Solver Copilot

You  
how do i share a report

Solver Copilot  
To share a report in Solver, follow these steps:

1. **Create a Category:**
  - Navigate to the search and filter pane and click **New Category**.
  - In the popup that appears, type in a descriptive category name (e.g., "Financials").
  - Optionally, add a description. This description is only visible to the creator of the category.
  - If the category is to be a top-level category, do not select anything from the "Choose Parent Category" dropdown. If it should fall under an existing category, select the appropriate parent category from the dropdown list.
  - Click **Create Category** to finalize the creation of the category. Click **Cancel** to exit without creating the category.
2. **Add Users to the Category:**
  - As the owner of the category, hover over the category and click the **Share** icon.

Hey, ask anything about Solver...



# Mid-Month Enhancements Available in the Monthly Release Notes

## Contents

New Features and Enhancements

Bug Fixes

Data Warehouse

Planning and Reporting

Additional Enhancements and Fixes

- Fixes an issue where the previous Solver update had resulted in the inability to run a report with different parameters in concurrent sessions if they were in different tabs.

## Additional Enhancements and Fixes

Following the [recent update to Solver's platform](#) that was executed in August, we are now able to bring our users some updates at a quicker pace than before. Starting this month, there will be semi-regular weekly releases that are automatically brought to users without any downtime. However, we will continue with our regularly scheduled monthly updates (the schedule for which can be found [here](#)) which will typically contain more significant changes to Solver. These weekly releases will only contain minor changes and will not include any major new features. We at Solver will continue working hard to ensure that you have the smoothest and best experience while using our application.

These fixes will be communicated through a new section at the bottom of our monthly release notes and will be discernable from the main release. We will be constantly updating these pages so be sure to check frequently. These fixes will also be called out in the following month's release notes which can always be found [here](#).

Below are the updates from the post-September release window:

- Updated Danish translations.
- Fixes an issue on the Home page where some cards were getting cut off and not fully being shown when scrolling through the activity section.
- Fixes an issue on the Home page where some of the links in the welcome activity cards were not being properly displayed. These notifications are only seen by new users who have just set up an account.
- Fixes an issue where some users were unable to remove a report from a report package.
- Fixes an issue where some users were unable to open a package from the new recent or favorites menus on the homepage
- Fixes an issue that users were experiencing when registering for a new account where the application would crash if the complete registration button was clicked multiple times.
- Fixes an issue where the planning security feature protection rules would fail if they had been applied to dimensions not related to scenario and period.
- Fixes an issue with Report templates where some date parameters were loading incorrectly.

# Demo



# Solver Road Map

## Possible New Features

- More Copilot
- New Integration service
- Connector Studio
- More pre-built connectors
- New UI/UX
- Business Rules
- Ad Hoc Charting
- KPIs & Alerts
- Multilevel Planning Workflows



# Q&A



Business  
Technology  
Services

# Questions?



# Contact

## Forvis Mazars



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