



Sales Analytics With Solver xFP&A & Power BI











September 2025

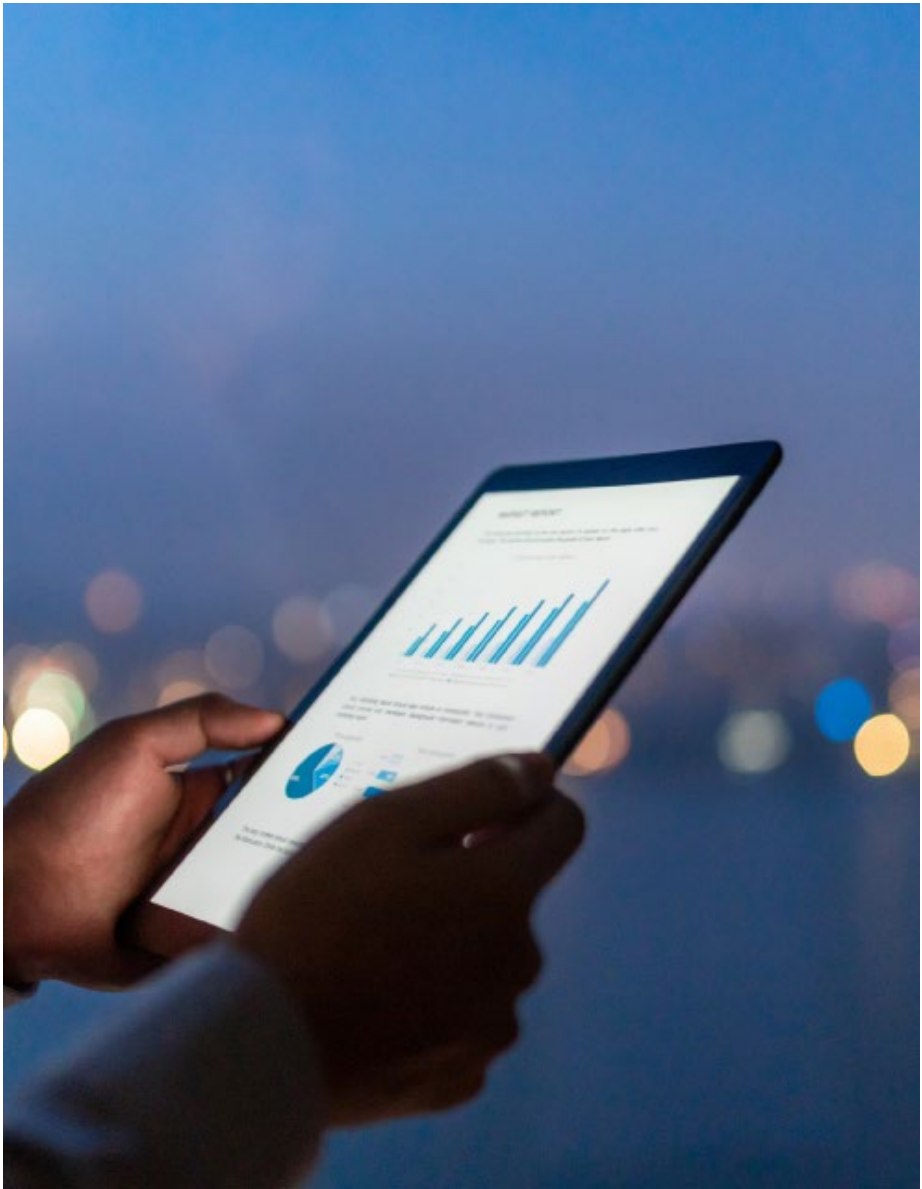
Business Technology Services

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

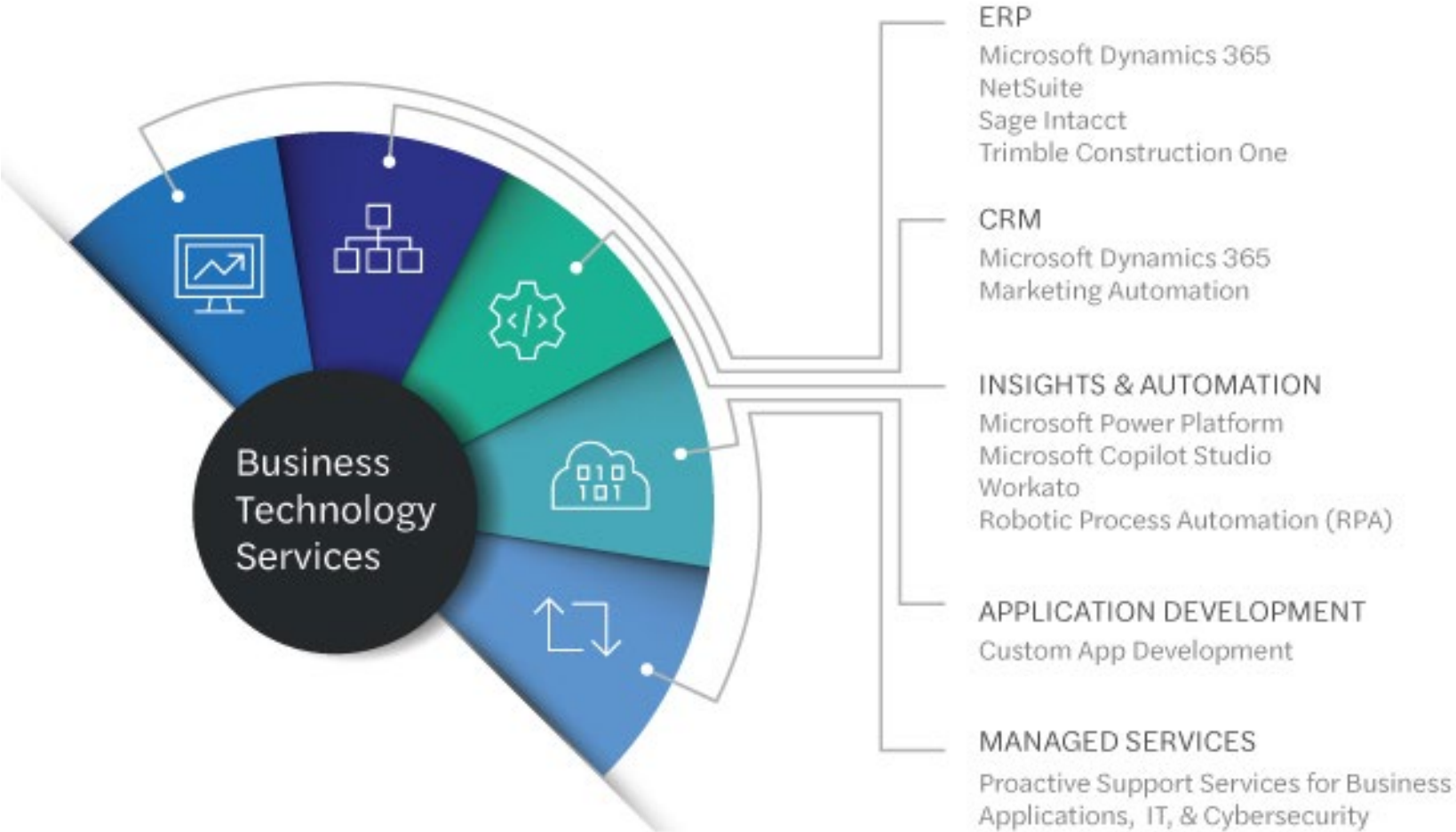
Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, & business intelligence (BI) tools.

Our end-to-end & managed service solutions 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 |



Premier Technology Partnerships



Microsoft Partner



Today's Presenter



Charles Allen

Senior Managing Consultant

charles.allen@us.forvismazars.com

Objectives

1. Explain the core capabilities of Solver xFP&A & its integration with Microsoft Power BI.
2. Identify key components of effective sales analytics dashboards.
3. Recognize opportunities to streamline reporting & forecasting processes.
4. Describe strategies for aligning sales & financial data to support business planning.



Agenda

1. Sales Data
2. Solver Data Warehouse
3. Analyzing Data
4. Sales Budgeting & Forecasting



01

Sales Data



Sales Data

Example Report

Sales Report – Key Customer Metrics

Sales Report - Key Customer Metrics

Period Ending March 31, 2019

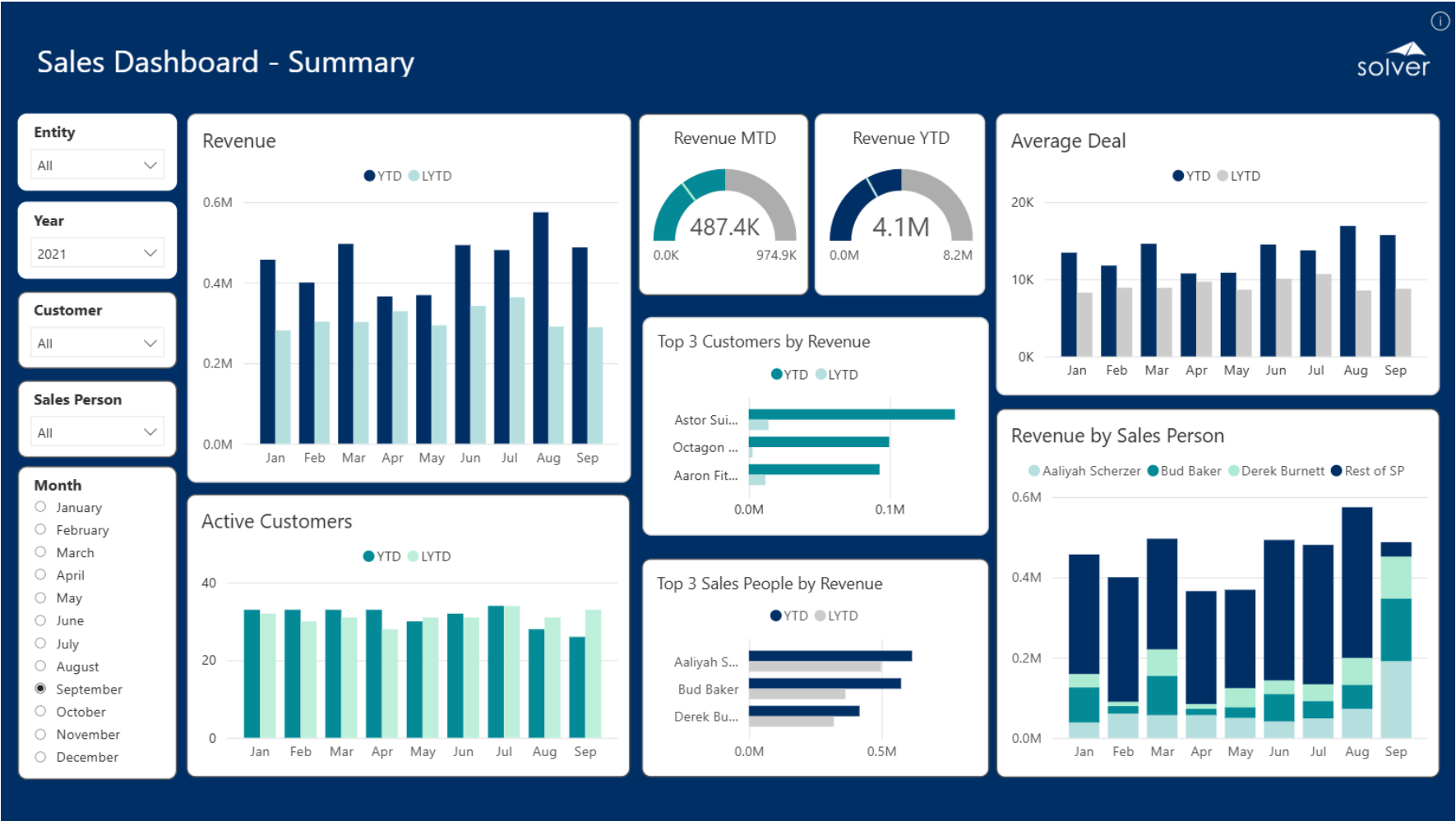
Purpose: The purpose of this report is to gain insight about customer sales



Sales Data

Example Report

Sales Summary



Where is your sales data?

Sales Data Sources

Accounting

CRM

Web

Sales Data



Sales Data

Popular Sales Systems



Microsoft Dynamics 365
Sales



How do you get the whole story from your data?

02

Solver Data Warehouse



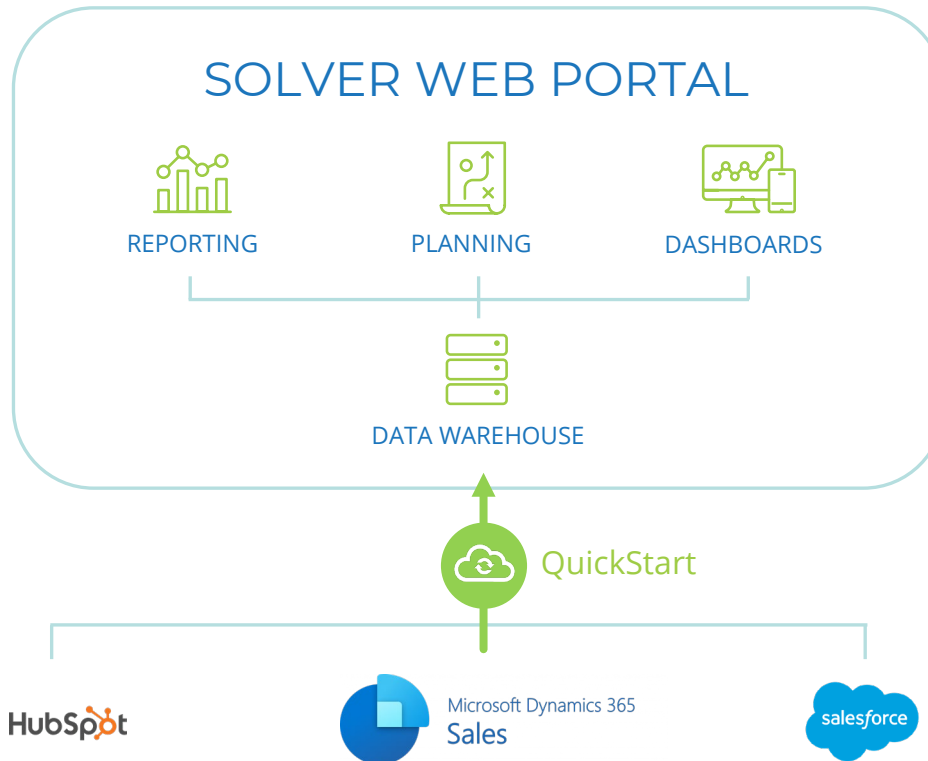


CEO

CFO

COO

CMO



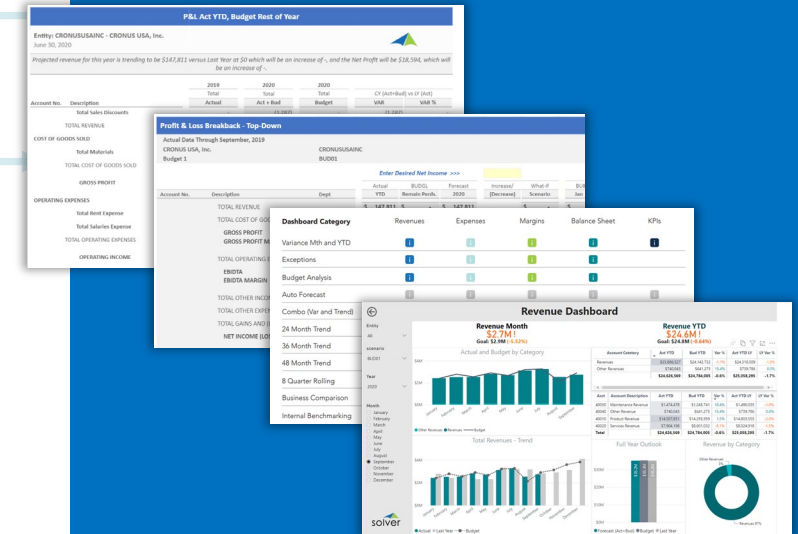
Download
& Share
Templates

Shop the
Template
Marketplace

Template Marketplace

Faster, Better Decisions

Plug-&-Play reports, budgeting & forecasting models, & over 50 Power BI dashboards








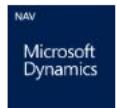
















Solver Data Warehouse Connectors

←

MARKETPLACE

Show installed ☒

 <div>ACUMATICA</div>	 <div>CSV FILES (DEPRECATED IN CLOU...</div>	 <div>DYNAMICS 365 BUSINESS CENTR...</div>	 <div>DYNAMICS 365 BUSINESS CENTR...</div>	 <div>DYNAMICS 365 FINANCE & OPER...</div>	 <div>DYNAMICS 365 SALES & SERVICE</div>
 <div>DYNAMICS GP 2016+ ODATA</div>	 <div>DYNAMICS NAV</div>	 <div>FILE IMPORT (EXCEL AND CSV)</div>	 <div>FILE IMPORT (PERSONNEL)</div>	 <div>GATEWAY CONNECTOR</div>	 <div>GENERIC ODATA</div>
 <div>GOOGLE ANALYTICS</div>	 <div>HUBSPOT</div>	 <div>NETSUITE</div>	 <div>QUICKBOOKS ONLINE</div>	 <div>SAGE INTACCT</div>	 <div>SALESFORCE</div>
 <div>SAP BUSINESS BYDESIGN</div>	 <div>SAP BUSINESS ONE - HANA</div>	 <div>SQL CONNECTOR</div>	<div>TEST CONNECTOR</div>	 <div>ZENDESK</div>	

Solver Template Marketplace For Sales

English × Hubspot × Clear all filters



R801 - CRM Opportunities - 18 Month Trend

Languages English CRM Hubspot Salesforce MS Sales

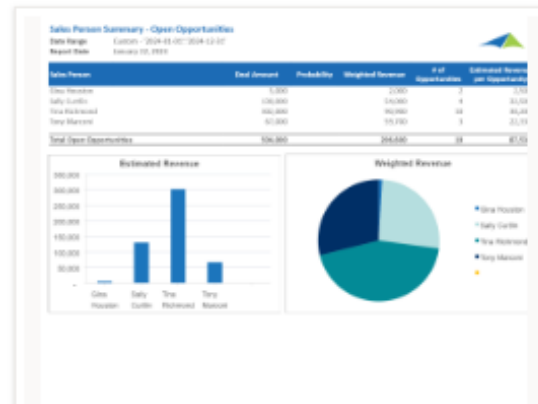
See details Add to install



R802 - CRM Opportunities - Sales Person Detail

Languages English CRM Hubspot Salesforce MS Sales

See details Add to install



R803 - CRM Opportunities - Sales Person Summary

Languages English CRM Hubspot Salesforce MS Sales

See details Add to install



R804 - CRM Opportunities - Sales Person Performance


Languages English CRM Hubspot Salesforce MS Sales

See details Add to install

Solver Template Marketplace

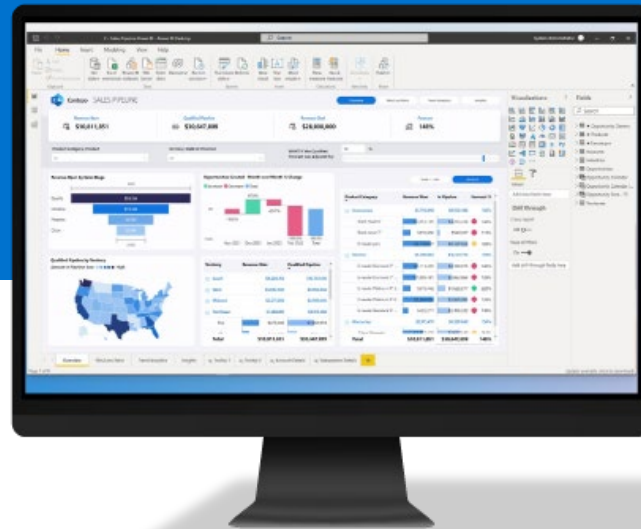
Example Report

R801 – CRM Opportunities – 18 Month Trend

<div># of Opportunities - 18 Month Rolling Trend</div> <div>The purpose of this report is to track win/loss statistics in total and by person on an 18 month rolling trend basis.</div>																			
Sales Person	201710	201711	201712	201801	201802	201803	201804	201805	201806	201807	201808	201809	201810	201811	201812	201901	201902	201903	201904
Gina Houston	9	11	4	6	15	13	13	8	15	15	5	5	8	6	7	7	10	3	2
Jeff Moyer				10	2	2			3	3			1		1	1			
Kirin Cool				1						1	2				26	1			
Sally Curtlin	14	15	14	19	22	18	18	14	24	11	16	16	11	30	12	17	6		
Tam Suthitham										1					1	65			
Tina Richmond	3	11	4	3	7	15	11	12	16	13	6	8	10	9	4	9	5		
Tony Marconi	4	8	5	1	25	26	10	21	14	13	16	5	10	5	4	2	2		
Total	30	45	27	40	71	74	52	55	72	57	45	34	40	50	55	102	23	3	2
Average Opport. /Person	4	6	4	6	10	11	7	8	10	8	6	5	6	7	8	15	3	1	1
Sales Person Benchmark	201710	201711	201712	201801	201802	201803	201804	201805	201806	201807	201808	201809	201810	201811	201812	201901	201902	201903	201904
Gina Houston																			
# of Opportunities	9	11	4	6	15	13	13	8	15	15	5	5	8	6	7	7	10		
# of Won Opportunities	5	4	3	1	4	6	6	1	7	6			1	4	4	1	3		
% Win Ratio	56%	36%	75%	17%	27%	46%	46%	13%	47%	40%	0%	0%	13%	67%	57%	14%	30%		20%
% Win Ratio vs Team Avg	167%	96%	184%	133%	82%	142%	185%	46%	240%	152%	0%	0%	71%	303%	349%	208%	99%		78%
Jeff Moyer																			
# of Opportunities				10	2	2			3	3			1		1	1			
# of Won Opportunities										1									
% Win Ratio	0%	0%	0%	0%	0%	0%	0%	0%	0%	33%	0%	0%	0%	0%	0%	0%	0%		0%
% Win Ratio vs Team Avg	0%	0%	0%	0%	0%	0%	0%	0%	0%	127%	0%	0%	0%	0%	0%	0%	0%		0%
Kirin Cool																			
# of Opportunities				1						1	2				26	1			
# of Won Opportunities																			
% Win Ratio	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0%
% Win Ratio vs Team Avg	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0%
Sally Curtlin																			
# of Opportunities	14	15	14	19	22	18	18	14	24	11	16	16	11	30	12	17	6		
# of Won Opportunities	1	5	2	3	8	3	1	4	2	2	3	2	2	2	3	3	2		
% Win Ratio	7%	33%	14%	16%	36%	17%	6%	29%	8%	18%	19%	13%	18%	7%	25%	18%	33%		13%
% Win Ratio vs Team Avg	21%	88%	35%	126%	112%	51%	22%	105%	43%	69%	141%	106%	104%	30%	153%	257%	110%		49%
Tam Suthitham																			
# of Opportunities										1					1	65			

Demo

Microsoft
Partner



03

Analyzing Data



Analyzing Data

Options for Reviewing Data

Solver Report Templates

- Built for Repeated Use
- Includes Drilldown
- Can Be Shared With Users

Solver Ad Hoc Reporting

- Used to Query Data
- Save & Share
- Export to Excel

Power BI Dashboard

- Designed for Online Use
- Interactive Visuals
- Drill Through Is Possible

Analyzing Data Solver Reporting

Creating a Report Template

Design the Report Layout



Start a New Report From the Portal



Add Fields & Filters to the Report



Publish the Report Template



Share the Report Template

Analyzing Data Solver Reporting

Sharing Results

Create a Publisher Job



Identify the Users, Distribution Method, & Output



Schedule the Job



Run the Job or Let It Run Automatically

Analyzing Data Solver Reporting

Report Result

Top 50 Opportunities

8/27/2025

Date Range: Custom - '2019-01-01':'2019-12-31'
Status : Open

Large vs Small Deals (based on Est. Rev.)		
Large >	\$50,000	13
Medium >	\$15,000	33
Small <	\$15,000	4

Average Days:
2599



Note: Shows the TOP 50 Opportunities AND with a 10% or higher probability are included

Opportunity	Est. Revenue	Estimated Close Date	Probability (%)	Weighted Rev.	Last Update	Created Date	# of Days in Pipeline	Sales Person
At Short	112,014	31-Aug-19	90%	100,812	8/1/2019	6/24/2019	2,255	Sally Curtlin
Bmr State Commercial Banks	76,000	30-Sep-19	90%	68,400	7/25/2019	1/5/2019	2,425	Sally Curtlin
Amet Book Printing	127,000	2-Sep-19	33%	41,910	7/29/2019	4/4/2019	2,336	Tony Marconi
Arcu Curry	96,000	30-Sep-19	33%	31,680	6/6/2019	5/14/2018	2,661	Gina Houston
Bms Communications Services	32,000	30-Sep-19	90%	28,800	7/25/2019	3/21/2019	2,350	Sally Curtlin
Bms Farm Machinery & Equipment	75,000	31-Jul-19	33%	24,750	6/6/2019	2/16/2019	2,384	Gina Houston
Bmr Transportation Services	40,000	31-Mar-19	50%	20,000	3/4/2019	1/18/2019	2,412	Gina Houston
Bms Pens	40,000	30-Aug-19	50%	20,000	8/1/2019	3/20/2019	2,351	Tina Richmond
Blandit Electronic Computers	97,000	31-May-19	20%	19,400	4/10/2019	4/10/2019	2,330	Tony Marconi
Amet Travel	62,000	31-Mar-19	30%	18,600	3/12/2019	6/28/2017	2,981	Tony Marconi
At Grain Mill Products	57,000	1-Apr-19	30%	17,100	3/12/2019	4/25/2013	4,506	Gina Houston
Bmh Co	85,000	1-Apr-19	20%	17,000	3/12/2019	10/23/2014	3,960	Gina Houston
Bmd Water Transportation	80,000	25-Dec-19	20%	16,000	4/15/2019	5/19/2017	3,021	Gina Houston
Amet Mobile Homes	72,000	30-Aug-19	20%	14,400	7/22/2019	12/13/2018	2,449	Tony Marconi
Bms Paper Mills	25,000	31-Jul-19	50%	12,500	3/15/2019	3/15/2019	2,356	Tina Richmond

Analyzing Data Solver

Report Result

Sales Person Summary

Date Range:

Custom - '2018-01-01':'2019-08-15'

Status

: Open, Won

Note:

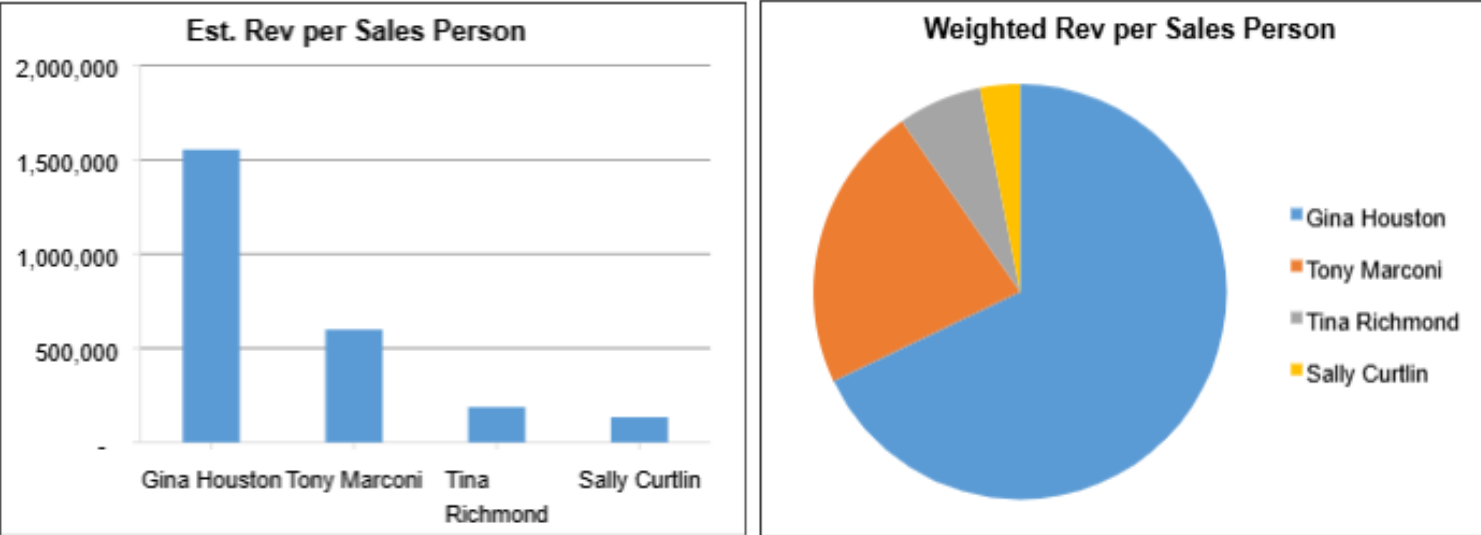
Only Opportunities with a 10% or higher probability is included

solver

Owner	Est. Revenue	Weight. Rev. (Closed in CRM)	# of Opport.	Avg Est. Rev/Opp.
Gina Houston	1,554,000	495,450	66	23,545
Tony Marconi	599,000		20	29,960
Tina Richmond	187,000		15	12,500
Sally Curtlin	134,000		3	44,667
Total	2,474,000	-	104	27,668

CHOOSE DRILLDOWN

D365 Opportunities




Analyzing Data Solver


Ad Hoc Reporting

Ad Hoc Reporting > Google Analytics by Source

 Save




 Export



 Revert to saved

Pivot

Google Analytics by Source

 Drag a column header here to create a rollup

Web Source Description	Avg. Session Duration	Avg. Time on Page	New Users	Page Views (Amount)	Sessions	Users
	749.00	744.00				
academy.Solvertraining.com	1,624,682.00	1,396,118.27	1,945.00		6,809.00	10,687.00
duckduckgo.com	2,275,590.87	2,640,164.25	13,796.00		21,630.00	34,745.00
facebook.com	248,283.90	194,137.00	1,172.00		1,877.00	2,624.00
Google.com	16,671,226.60	19,957,311.92	290,465.00		373,608.00	543,533.00
microsoft.com	329,046.03	301,547.16	1,990.00		2,813.00	3,830.00
www.linkedin.com	77,614.05	77,419.30	1,432.00		1,839.00	2,261.00
www.solverglobal.com	369,225.17	339,704.40	2,749.00		3,229.00	4,614.00
www.yahoo.com	737,793.13	561,678.28	1,652.00		2,718.00	4,184.00
Total	22,334,210.75	25,468,824.58	315,201.00		414,523.00	606,478.00

Analyzing Data Power BI

Steps to Use Power BI

Select the Solver Modules to Use



Use the Solver Data Source in Power BI



Get the Solver Data



Design the Report



Publish to the Power BI App Service

Analyzing Data Power BI

Get Data

solver

All

Other

All

Solver

Certified Connectors

Template Apps

Connect

Cancel

Navigator

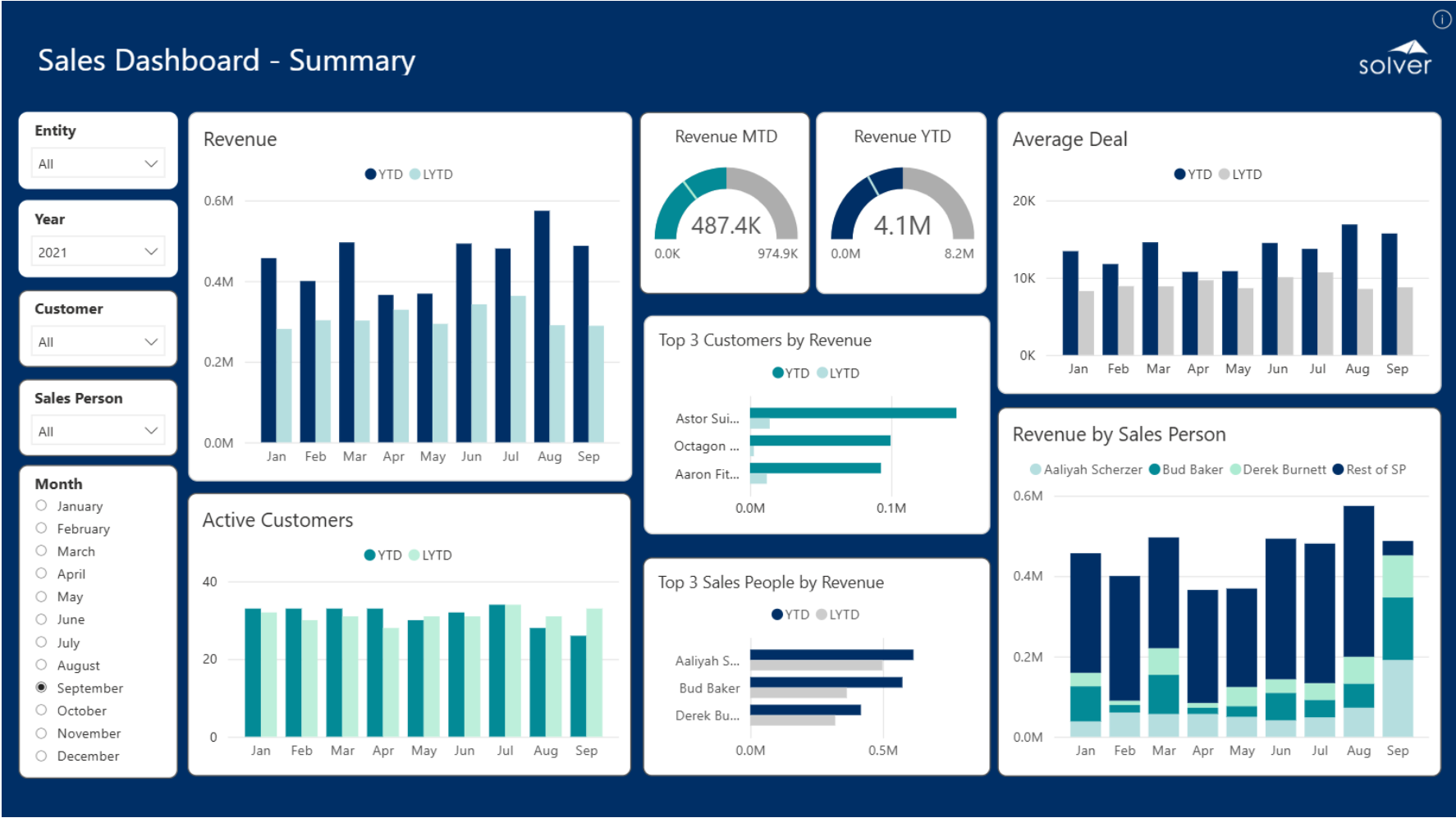
Display Options

- ☐ Dimension Salesforce Account
- ☐ Dimension Scenario
- ☐ Dimension Stargate
- ☐ Dimension Sub Account
- ☐ Dimension Vendor
- ☐ Module Contract
- ☐ Module General Ledger
- ☐ Module General Ledger Detail
- ☐ Module Invoices
- ☐ Module Job Module
- ☐ Module Opportunity Cross Reference Data
- ☐ Module Sales Orders
- ☐ Module Salesforce Opportunity

ncel

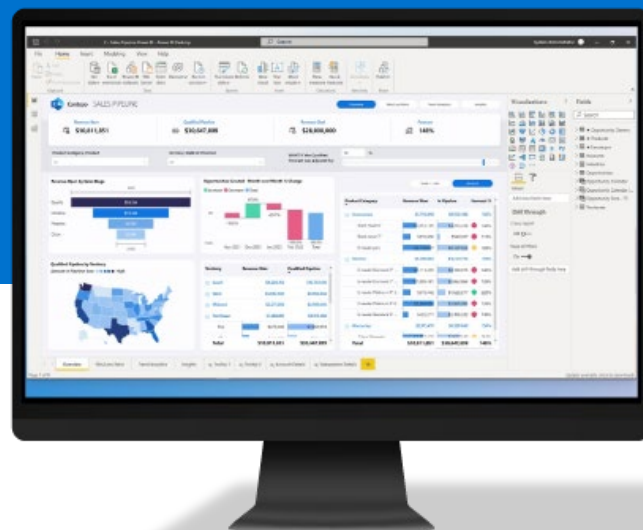
Analyzing Data Power BI

Dashboard



Demo

Microsoft
Partner



04

Sales Budgeting & Forecasting



Sales Budgeting & Forecasting Input Forms

Start a New Template From the Portal



Create the Template



Publish the Template



Share the Template



Users Enter Data

Sales Budgeting & Forecasting Solver

Input Form

Sales Budget

Goal from Power BI Simulation:

Instructions: Use the Forecast form to first populate the rest of the current year. Then use the Budget Adjustment column in this form to generate the Budget for next year.

Sales Person	Current Yr Est Total	Budget Adjustment	Bud January	Bud February	Bud March	Bud April	Bud May	Bud June	Bud July	Bud August	Bud September	Bud October	Bud November	Bud December	Next Yr Bud Total
Gina Houston	1,170,660		196,462	94,198	211,387	113,340	296,836	194,999	542,696	180,982	163,759	238,973	237,958	301,492	2,773,080
Nacho Pavarotti	648,239		108,788	52,161	117,053	62,761	164,369	107,978	300,511	100,216	90,680	132,328	131,766	166,947	1,535,559
Sally Curtlin	1,192,595		200,143	95,963	215,348	115,464	302,398	198,652	552,864	184,373	166,827	243,450	242,416	307,141	2,825,039
Tina Richmond	1,366,040		229,251	109,919	246,667	132,256	346,377	227,543	633,270	211,187	191,090	278,857	277,672	351,810	3,235,899
Tony Marconi	547,286		91,847	44,038	98,824	52,987	138,772	91,162	253,711	84,609	76,558	111,720	111,246	140,948	1,296,422
Total	4,924,820		826,491	396,278	889,279	476,807	1,248,753	820,335	2,283,052	761,366	688,914	1,005,329	1,001,058	1,268,338	11,666,000

Variance from Goal:

Manager's Comment:

Sales Budgeting & Forecasting Solver

Input Form

 **Subscription Revenue Forecasting**

Company:

Silver, Inc.

Department:

Sales

Current Period:

5/1/2019

Budget Scenario:

Budget

Forecast Scenario:

Forecast Jun

Drivers:

Number of New Deals per Month

9

Annual Growth in New Deals

10%

Avg Subscription Amount

\$ 14,000

Avg Subscription (Mths)

13

Annual Price Adjustment (affects future years)

2.10%

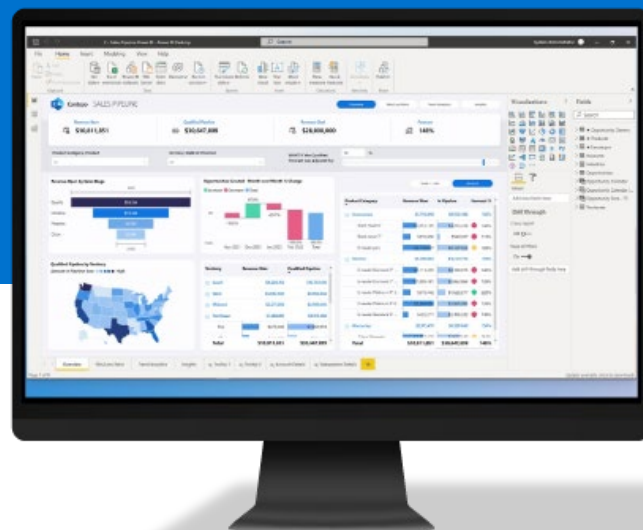
Avg Churn

4.00%

	Total 2019	Total 2020	Total 2021	Total 2022	Total 2023	Total 2024	Total 2025	Total 2026	Total 2027	Total 2028	Total 2029	Total 2030
Number of New Deals per Month with Growth	63.0	118.8	130.7	143.7	158.1	173.9	191.3	210.5	231.5	254.7	280.1	308.1
Monthly Revenue (Cash Basis)	\$ 882,000	\$ 1,663,200	\$ 1,829,520	\$ 2,012,472	\$ 2,213,719	\$ 2,435,091	\$ 2,678,600	\$ 2,946,460	\$ 3,241,106	\$ 3,565,217	\$ 3,921,739	\$ 4,313,912
Monthly Revenue (GAAP Basis)	\$ -	\$ 1,645,754	\$ 3,264,175	\$ 5,044,439	\$ 7,002,729	\$ 9,156,848	\$ 11,526,379	\$ 14,132,863	\$ 16,999,996	\$ 20,153,841	\$ 23,623,072	\$ 27,439,225
Monthly Revenue (GAAP Basis) - With Price Adjustment	\$ -	\$ 1,680,315	\$ 3,332,723	\$ 5,150,372	\$ 7,149,786	\$ 9,349,142	\$ 11,768,433	\$ 14,429,653	\$ 17,356,996	\$ 20,577,072	\$ 24,119,156	\$ 28,015,449
Avg Churn	\$ 46,929	\$ 67,213	\$ 133,309	\$ 206,015	\$ 285,991	\$ 373,966	\$ 470,737	\$ 577,186	\$ 694,280	\$ 823,083	\$ 964,766	\$ 1,120,618
Total Monthly Revenue (GAAP)	\$ 407,897	\$ 1,613,102	\$ 3,199,414	\$ 4,944,357	\$ 6,863,795	\$ 8,975,176	\$ 11,297,696	\$ 13,852,467	\$ 16,662,716	\$ 19,753,989	\$ 23,154,390	\$ 26,894,831

Demo

Microsoft
Partner



Q&A



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.