Using Solver xFP&A With Microsoft Dynamics

February 27, 2025

forvis mazars

U.S. Presence

Top 10
U.S. Public Accounting Firm*

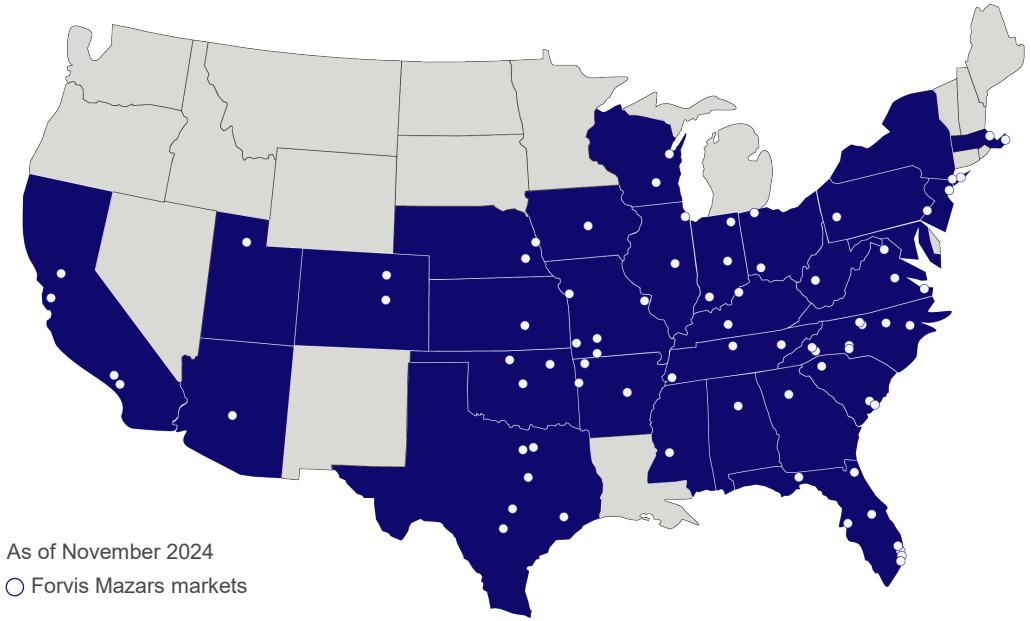
$2.2bn
Revenue (FY2024)

76
Markets

29
States

600+
Partners & Principals

7,000+
Employees



As of November 2024
◯ Forvis Mazars markets

Alabama
Birmingham

Arizona
Phoenix

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Fort Lauderdale
Jacksonville
Miami
Orl&o
Tallahassee
Tampa Bay
West Palm Beach

Georgia
Atlanta

Illinois
Chicago
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston Brewster
Boston-Chestnut Hill

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Isl&
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro
Greenville
Hendersonville
Raleigh
Winston-Salem

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Fort Washington
Pittsburgh

South Carolina
Charleston
Greenville
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond
Tysons

West Virginia
Charleston

Wisconsin
Appleton
Madison

* Source: Inside Public Accounting, based on most recent rankings
FY2024 combined revenues: FORVIS & Mazars USA

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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

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Business Technology Services

ERP

- Microsoft Dynamics 365
  - Finance
  - Supply Chain
  - Commerce
  - Project Operations
  - Business Central
  - Dynamics GP
- NetSuite
- Sage & Sage Intacct
- Trimble Construction One

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 Partner

Sage Partner

salesforce PARTNER

solver

Trimble Construction One™

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Today’s Presenter

Business Technology Services Practice

“Our team is focused on delivering an Unmatched Client Experience® on every engagement.”

– Chad Back, Partner

Charles Allen

Senior Managing Consultant

charles.allen@us.forvismazars.com

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Using Solver xFP&A With Microsoft Dynamics

February 27, 2025

forvis mazars

Objectives

- Recognize Solver's integration with Microsoft Dynamics products
- Explain report & plan creation in Solver
- Describe how to use Solver's data warehouse for multiple systems
- Define how Solver's data warehouse can be used with Power BI

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Agenda

1. What is Solver xFP&A?
2. Reporting & Planning in Dynamics
3. Dynamics Integration
4. Reporting
5. Planning
6. Power BI

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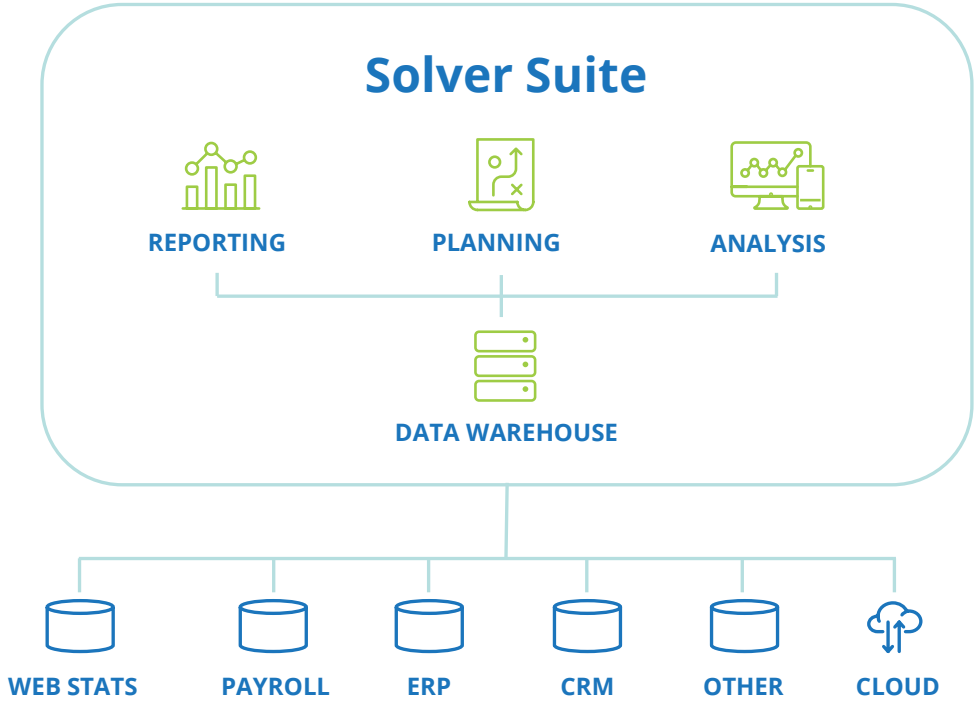
01

What Is Solver xFP&A?

What Is Solver xFP&A?
Extended Financial Planning & Analysis

An Overview



Benefits

- Single cloud portal & database
- Integration to multiple source systems
- Pre-built templates

Solver Apps

- Process automation
- KPIs & alerts
- Dashboards
- Reporting & consolidation
- Budgeting & forecasting
- Data warehouse
- Template marketplace

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Solver xFP&A
Case Studies

Dynamic GP

- Beverage distribution
- Reporting for multiple divisions
- Planning
  - Financial
  - Marketing
  - Revenue
- Replace FRx/Forecaster

Dynamics 365 Business Central

- Hospice
- Consolidated financial reports
- GL data
- Automated board reports
- Reporting in 10 minutes instead of two days

Dynamics 365 Finance

- Healthcare
- GL data from ERP system
- Non-GL data from EHR system
- Reporting & planning

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02

Reporting & Planning in Dynamics

Reporting & Planning in Dynamics
Built-In & Popular Options

ERP	Reporting	Planning
Dynamics GP	• Management Reporter • SmartList • SQL Server Reporting Services • Power BI	• Budget Excel Wizard • Forecaster (retired)
Business Central	• Financial Reporting • Lists • Power BI	• G/L Budgets • Cost Budget per Period
Finance & Supply Chain Management	• Financial Reporting (Management Reporter) • Lists • Power BI	• Budget Planning

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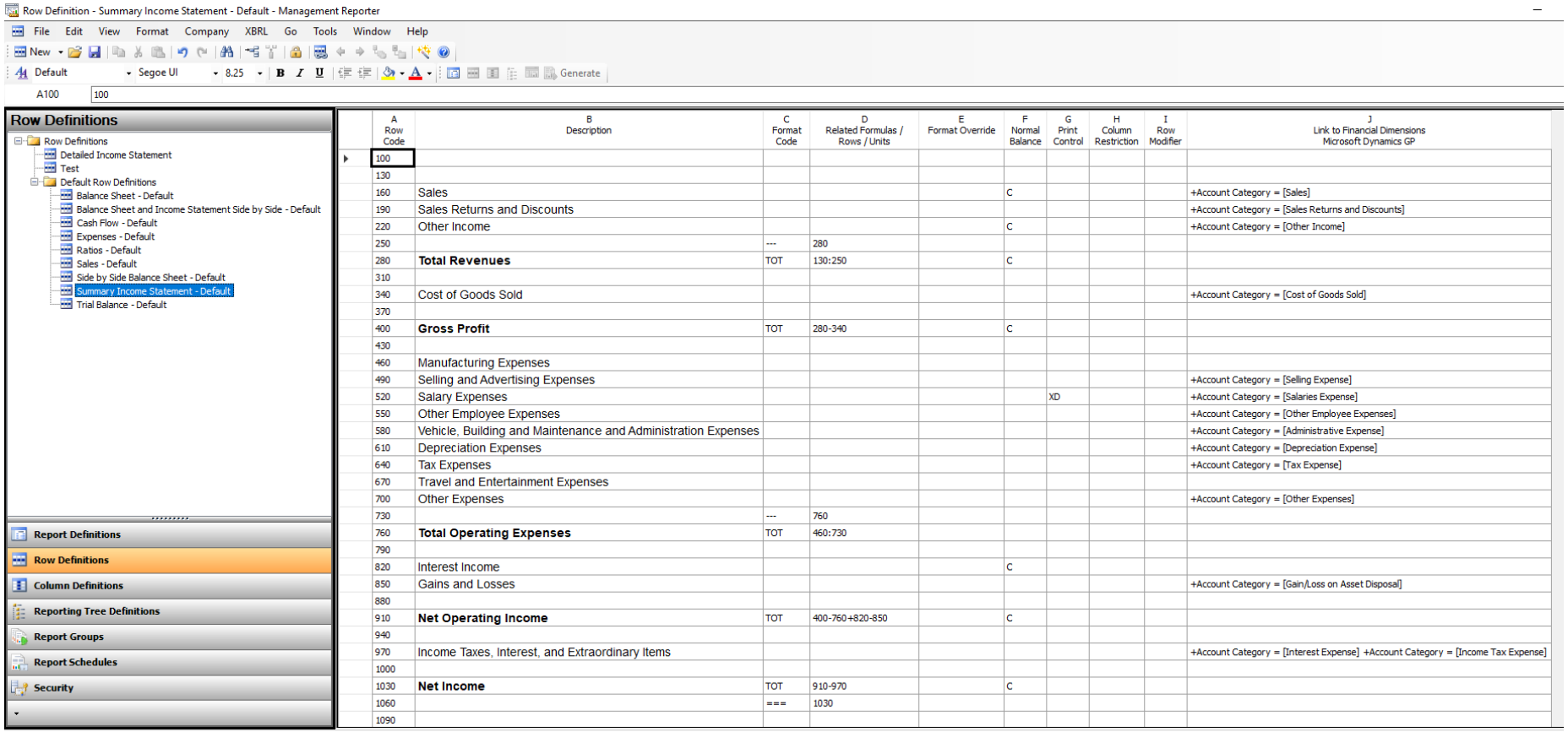
Reporting & Planning in Dynamics
Management Reporter

Row Definition



A Row Code	B Description	C Format Code	D Related Formulas / Rows / Units	E Format Override	F Normal Balance	G Print Control	H Column Restriction	I Row Modifier	J Link to Financial Dimensions Microsoft Dynamics GP
100									
130									
160	Sales				C				+Account Category = [Sales]
190	Sales Returns and Discounts								+Account Category = [Sales Returns and Discounts]
220	Other Income				C				+Account Category = [Other Income]
250		---	280						
280	**Total Revenues**	TOT	130:250		C				
310									
340	Cost of Goods Sold								+Account Category = [Cost of Goods Sold]
370									
400	**Gross Profit**	TOT	280-340		C				
430									
460	Manufacturing Expenses								
490	Selling and Advertising Expenses								+Account Category = [Selling Expense]
520	Salary Expenses					XD			+Account Category = [Salaries Expense]
550	Other Employee Expenses								+Account Category = [Other Employee Expenses]
580	Vehicle, Building and Maintenance and Administration Expenses								+Account Category = [Administrative Expense]
610	Depreciation Expenses								+Account Category = [Depreciation Expense]
640	Tax Expenses								+Account Category = [Tax Expense]
670	Travel and Entertainment Expenses								
700	Other Expenses								+Account Category = [Other Expenses]
730		---	760						
760	**Total Operating Expenses**	TOT	460:730						
790									
820	Interest Income				C				
850	Gains and Losses								+Account Category = [Gain/Loss on Asset Disposal]
880									
910	**Net Operating Income**	TOT	400-760+820-850		C				
940									
970	Income Taxes, Interest, and Extraordinary Items								+Account Category = [Interest Expense] +Account Category = [Income Tax Expense]
1000									
1030	**Net Income**	TOT	910-970		C				
1060		===	1030						
1090									

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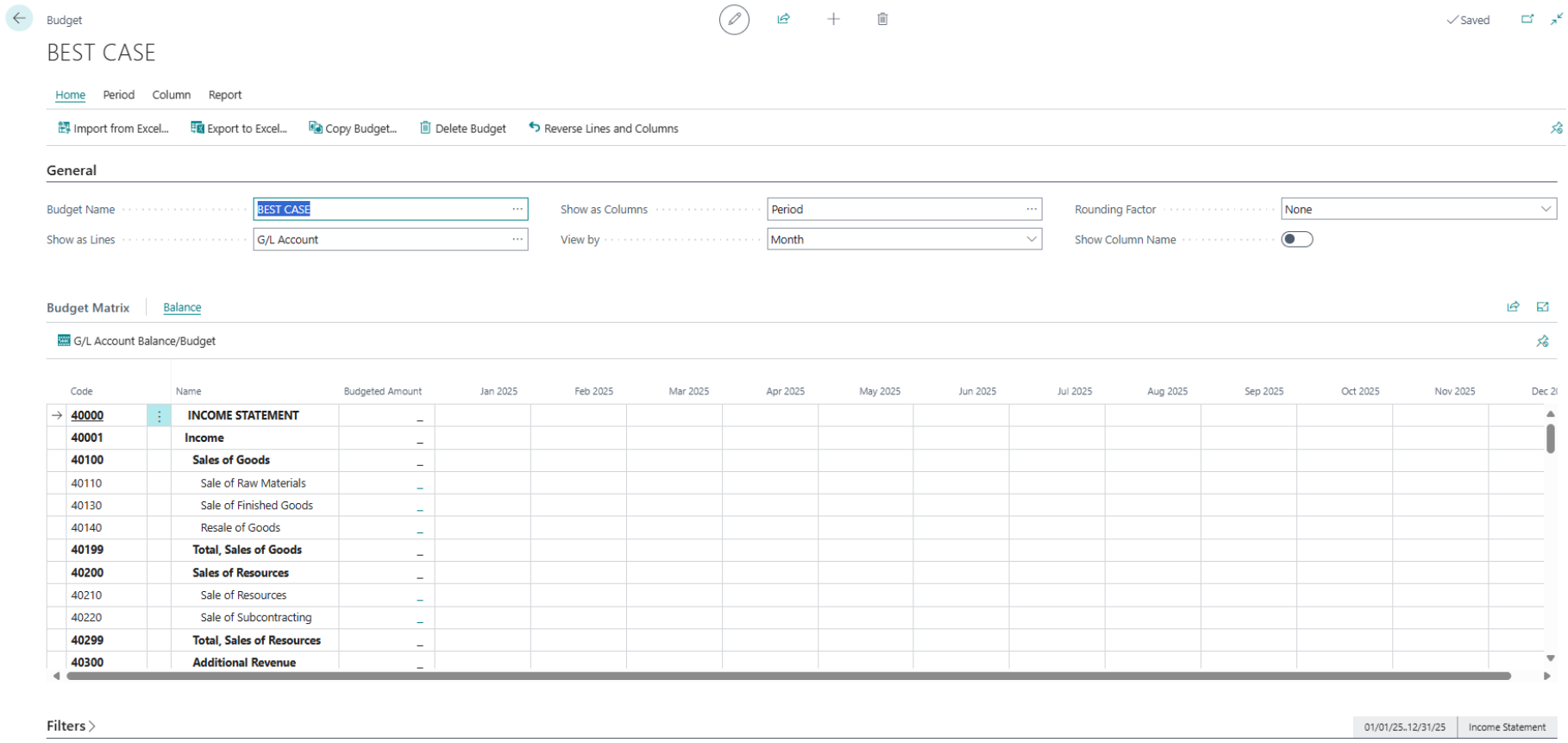
Reporting & Planning in Dynamics
Business Central GL Budget

Data Entry Window



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03

Dynamics Integration

Integration
Dynamics GP

Options

Gateway Connector	Hybrid Connector
• SQL & files • Utilize SQL views & tables • Import from any data • Multicompany reporting	• Live connection • Connect to all GP data • One company at a time

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Dynamics GP
Hybrid Connector

Default Data Sources

Finance – GL/Bank Rec/AA	Sales Order – AR/SOP/Invoicing	Purchasing – AP/POP/Requisitions	Inventory – Inventory	Payroll – Payroll/Direct Deposit
Human Resources	Fixed Assets	Manufacturing – BOM/Order Master/PickList	Project Accounting	Field Service – Contract

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Integration
Business Central

Options

Solver Extension

- GL
- AP
- AR
- Sales
- Fixed Assets
- GL Budget Data

Web Services

- All web services available within Business Central

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Integration
Dynamics Finance & Supply Chain Management

Options

Solver Extension

- GL

Synapse

- Azure SQL connector
- Any data exposed

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Reporting & Planning in Dynamics
Dynamics SL

Gateway Connector

SQL views & tables

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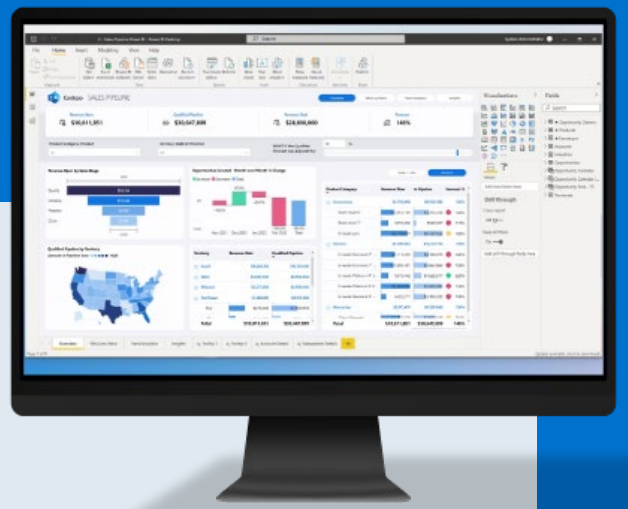
Demo



Microsoft Partner

solver

04

Reporting

Reporting
The Solver Experience

Components

Report Designer for Users Creating Reports	Ad Hoc Reporting	Archive Reports
• Excel add-in • Utilizes Excel skills	• Available for Standard & Viewer user types • Power BI-like experience	• Saved instances • Available for all user types

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Designing Reports
Components

Excel add-in

Standard user license

Report designer permissions

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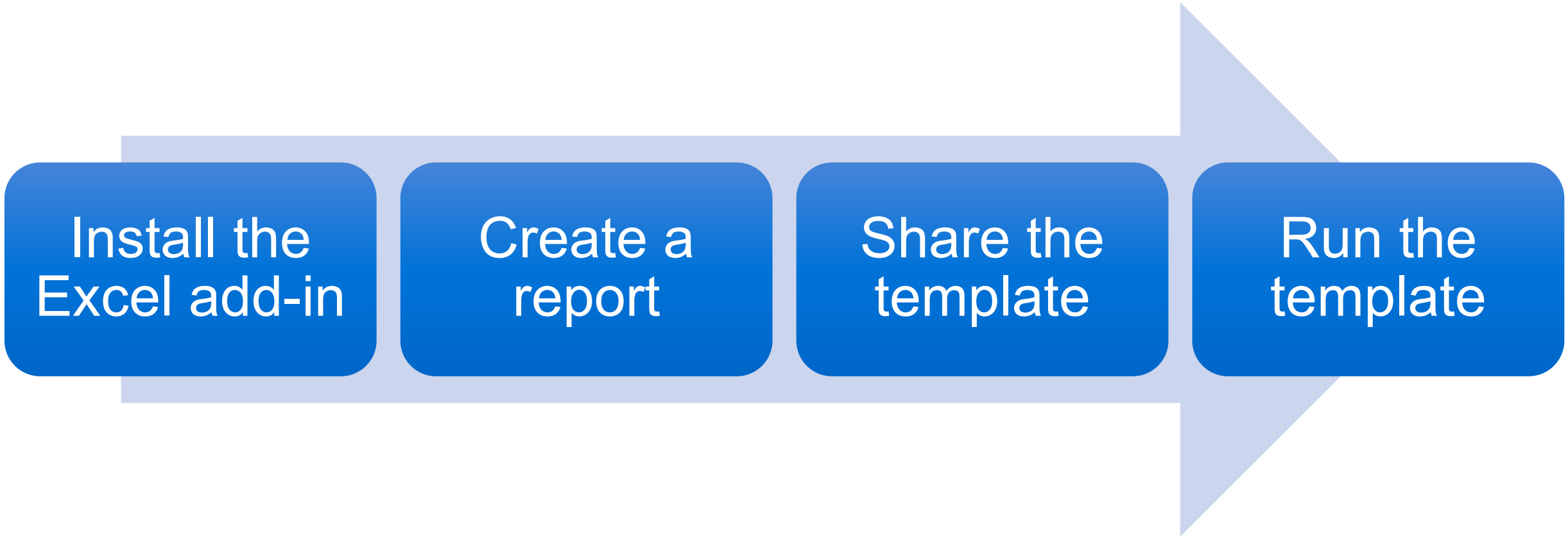
Reporting
The Solver Experience

Steps to Create Reports



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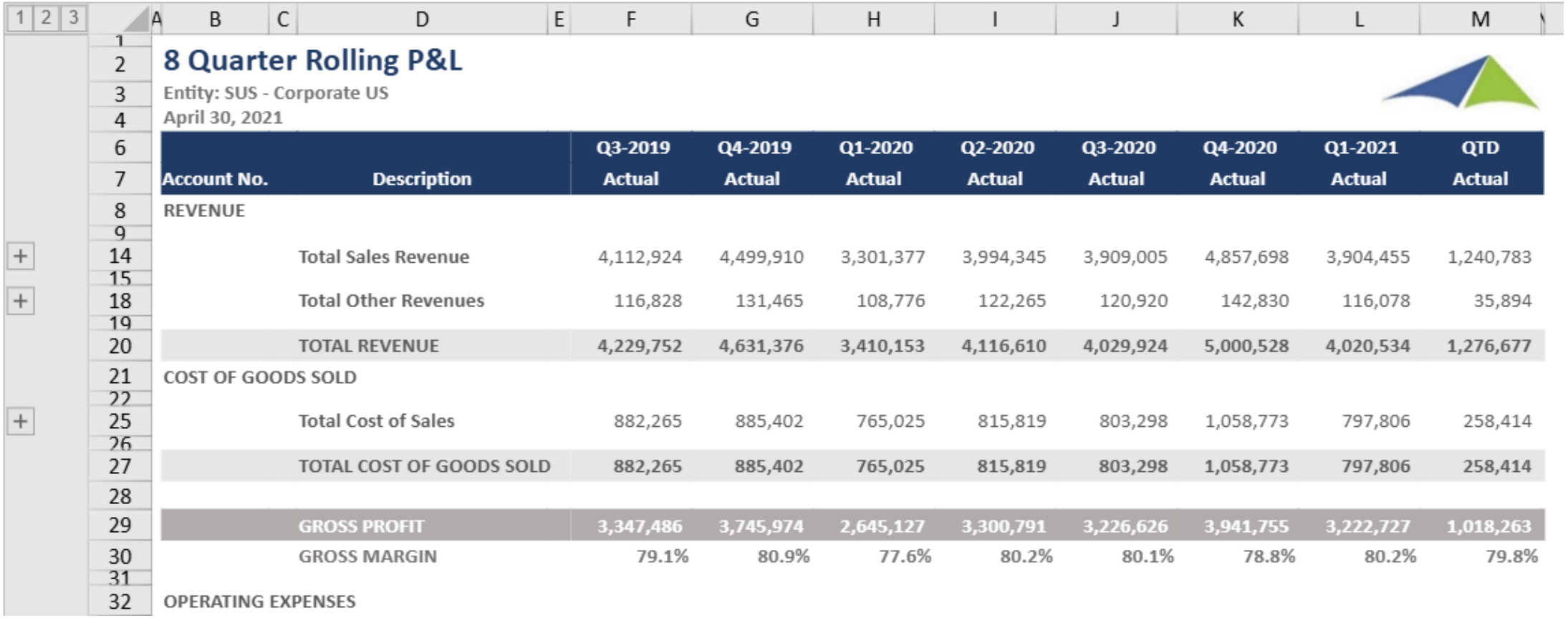
Reporting
Template Examples

8 Quarter Rolling P&L



8 Quarter Rolling P&L

Entity: SUS - Corporate US

April 30, 2021

Account No.	Description	Q3-2019 Actual	Q4-2019 Actual	Q1-2020 Actual	Q2-2020 Actual	Q3-2020 Actual	Q4-2020 Actual	Q1-2021 Actual	QTD Actual
REVENUE									
	Total Sales Revenue	4,112,924	4,499,910	3,301,377	3,994,345	3,909,005	4,857,698	3,904,455	1,240,783
	Total Other Revenues	116,828	131,465	108,776	122,265	120,920	142,830	116,078	35,894
	TOTAL REVENUE	4,229,752	4,631,376	3,410,153	4,116,610	4,029,924	5,000,528	4,020,534	1,276,677
COST OF GOODS SOLD									
	Total Cost of Sales	882,265	885,402	765,025	815,819	803,298	1,058,773	797,806	258,414
	TOTAL COST OF GOODS SOLD	882,265	885,402	765,025	815,819	803,298	1,058,773	797,806	258,414
	GROSS PROFIT	3,347,486	3,745,974	2,645,127	3,300,791	3,226,626	3,941,755	3,222,727	1,018,263
	GROSS MARGIN	79.1%	80.9%	77.6%	80.2%	80.1%	78.8%	80.2%	79.8%
OPERATING EXPENSES									

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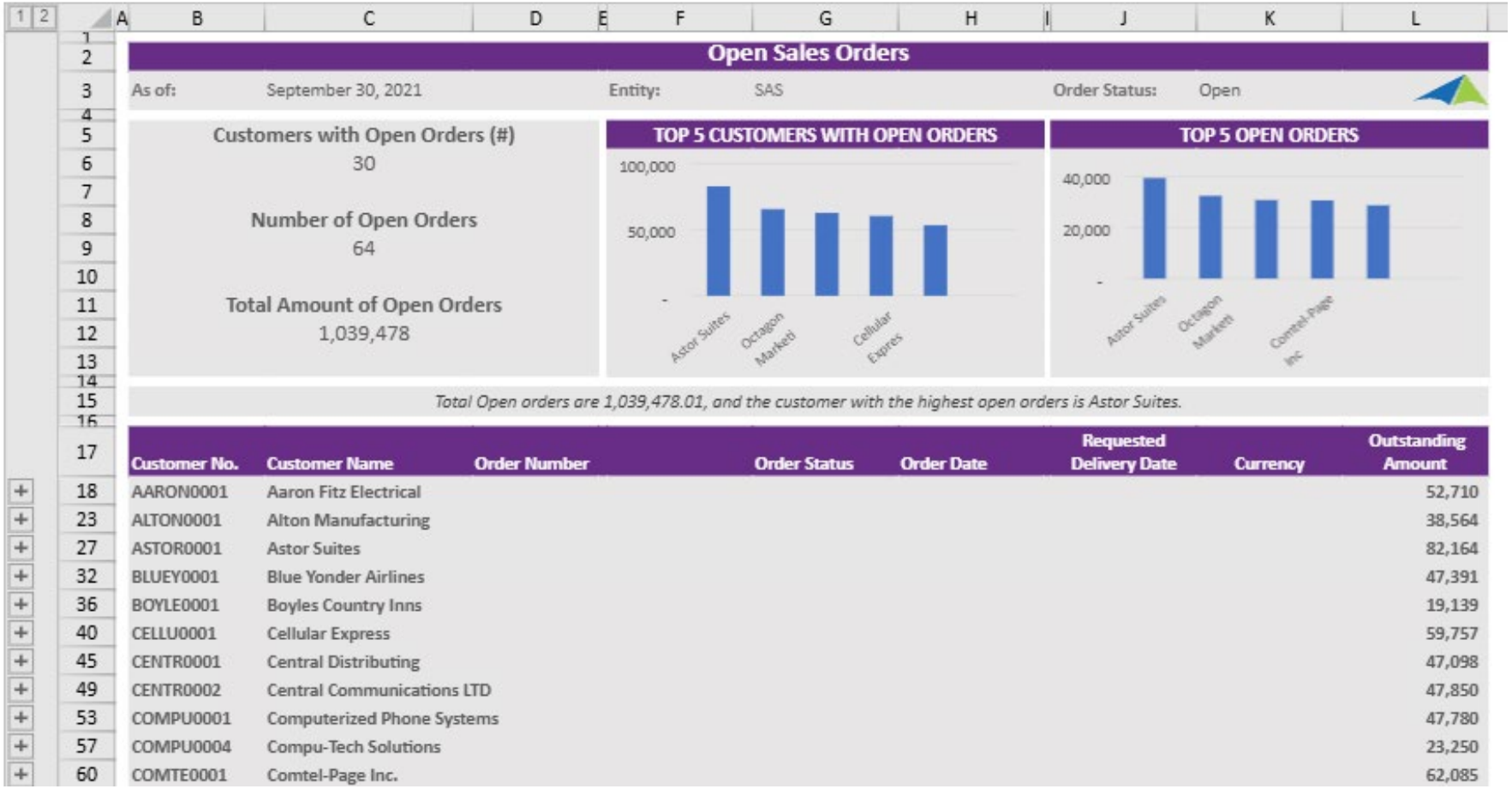
Reporting
Template Examples

Sales Report



Open Sales Orders

As of: September 30, 2021 | Entity: SAS | Order Status: Open

Customers with Open Orders (#)
30

Number of Open Orders
64

Total Amount of Open Orders
1,039,478

Total Open orders are 1,039,478.01, and the customer with the highest open orders is Astor Suites.

Customer No.	Customer Name	Order Number	Order Status	Order Date	Requested Delivery Date	Currency	Outstanding Amount
AARON0001	Aaron Fitz Electrical						52,710
ALTON0001	Alton Manufacturing						38,564
ASTOR0001	Astor Suites						82,164
BLUEY0001	Blue Yonder Airlines						47,391
BOYLE0001	Boyles Country Inns						19,139
CELLU0001	Cellular Express						59,757
CENTR0001	Central Distributing						47,098
CENTR0002	Central Communications LTD						47,850
COMPU0001	Computerized Phone Systems						47,780
COMPU0004	Compu-Tech Solutions						23,250
COMTE0001	Comtel-Page Inc.						62,085

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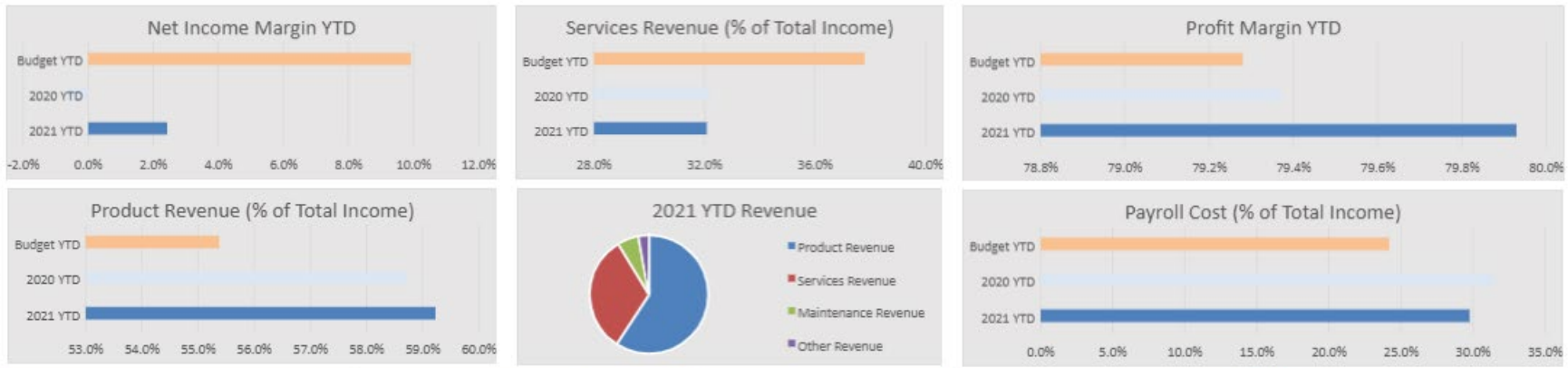
Reporting
Viewing a Report

P&L Combo Report with KPI Analysis
Corporate US



	September, 2021							Year-To-Date						
Account Descriptions	**Actual**	**Prior Year**	**Variance**	**Var %**	**Budget**	**Variance**	**Variance**	**Actual**	**Prior Year**	**Variance**	**Var %**	**Budget**	**Variance**	**Variance**
Revenue														
40010 Product Revenue	730,880	727,797	3,083	0.4%	725,000	5,880	0.8%	7,562,564	6,787,593	774,972	11.4%	7,188,874	373,690	5.2%
40020 Services Revenue	540,925	422,346	118,578	28.1%	421,463	119,462	28.3%	4,096,731	3,721,661	375,070	10.1%	4,906,947	(810,216)	-16.5%
40030 Maintenance Revenue	59,664	81,610	(21,946)	-26.9%	0	59,664	0.0%	745,818	695,474	50,344	7.2%	591,481	154,337	26.1%
40040 Other Revenue	31,677	39,605	(7,928)	-20.0%	0	31,677	0.0%	363,792	351,960	11,832	3.4%	294,635	69,157	23.5%
40050 Comprehensive Income	0	0	0	0.0%	0	0	0.0%	0	0	0	0.0%	0	0	0.0%
Total Revenue	1,363,145	1,271,357	91,788	7.2%	1,146,463	216,682	18.9%	12,768,904	11,556,687	1,212,218	10.5%	12,981,937	(213,033)	-1.6%
Cost of Goods Sold														
50010 COGS - Product Sales	254,515	262,877	8,362	3.2%	246,880	(7,635)	-3.1%	2,562,847	2,384,143	(178,705)	-7.5%	2,689,849	127,002	4.7%
Cost of Goods Sold	254,515	262,877	8,362	3.2%	246,880	(7,635)	-3.1%	2,562,847	2,384,143	(178,705)	-7.5%	2,689,849	127,002	4.7%
Profit Margin	1,108,630	1,008,480	100,150	9.9%	899,583	209,047	23.2%	10,206,057	9,172,544	1,033,513	11.3%	10,292,088	(86,031)	-0.8%
Profit Margin %	81.3%	79.3%	2.0%	2.5%	78.5%	2.9%	3.6%	79.9%	79.4%	0.6%	0.7%	79.3%	0.6%	0.8%

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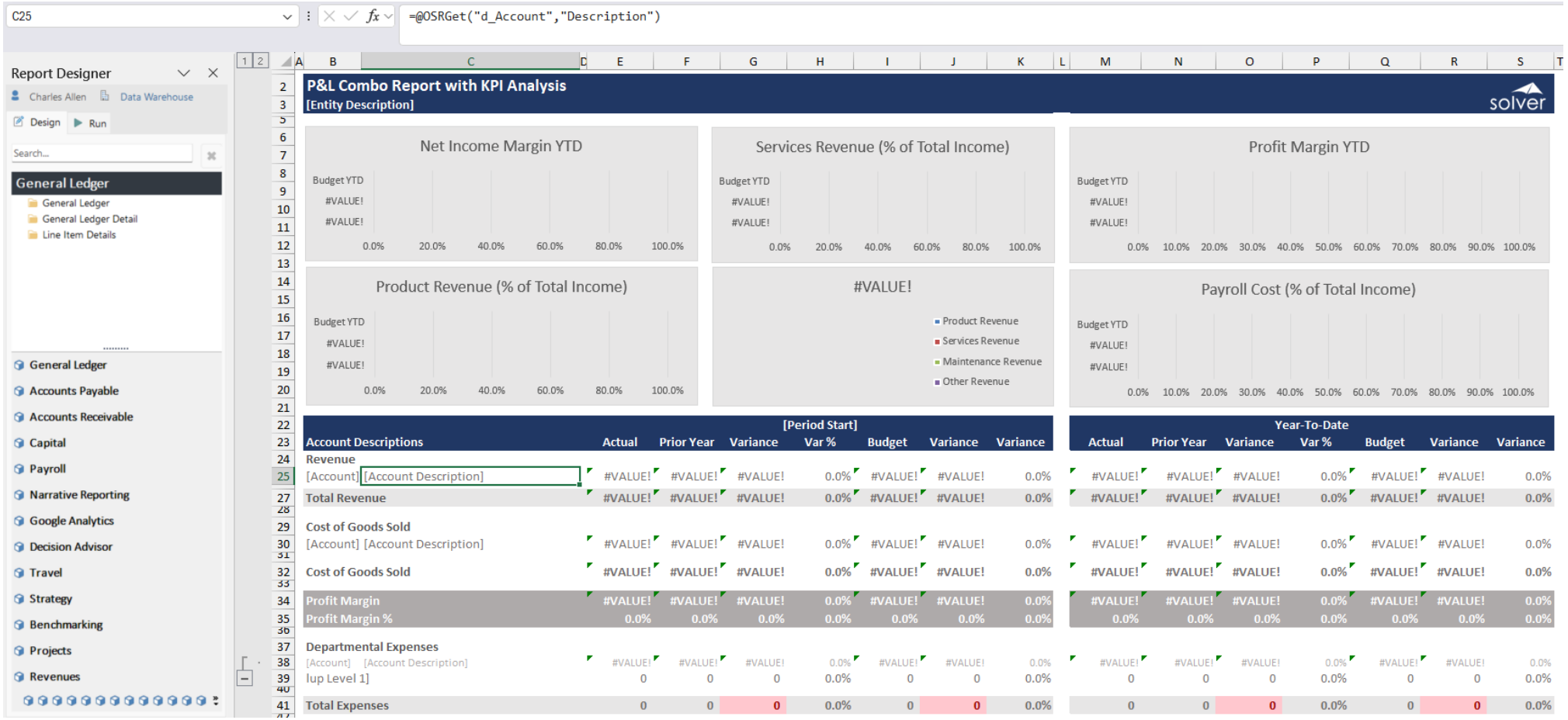
Reporting
Report Design



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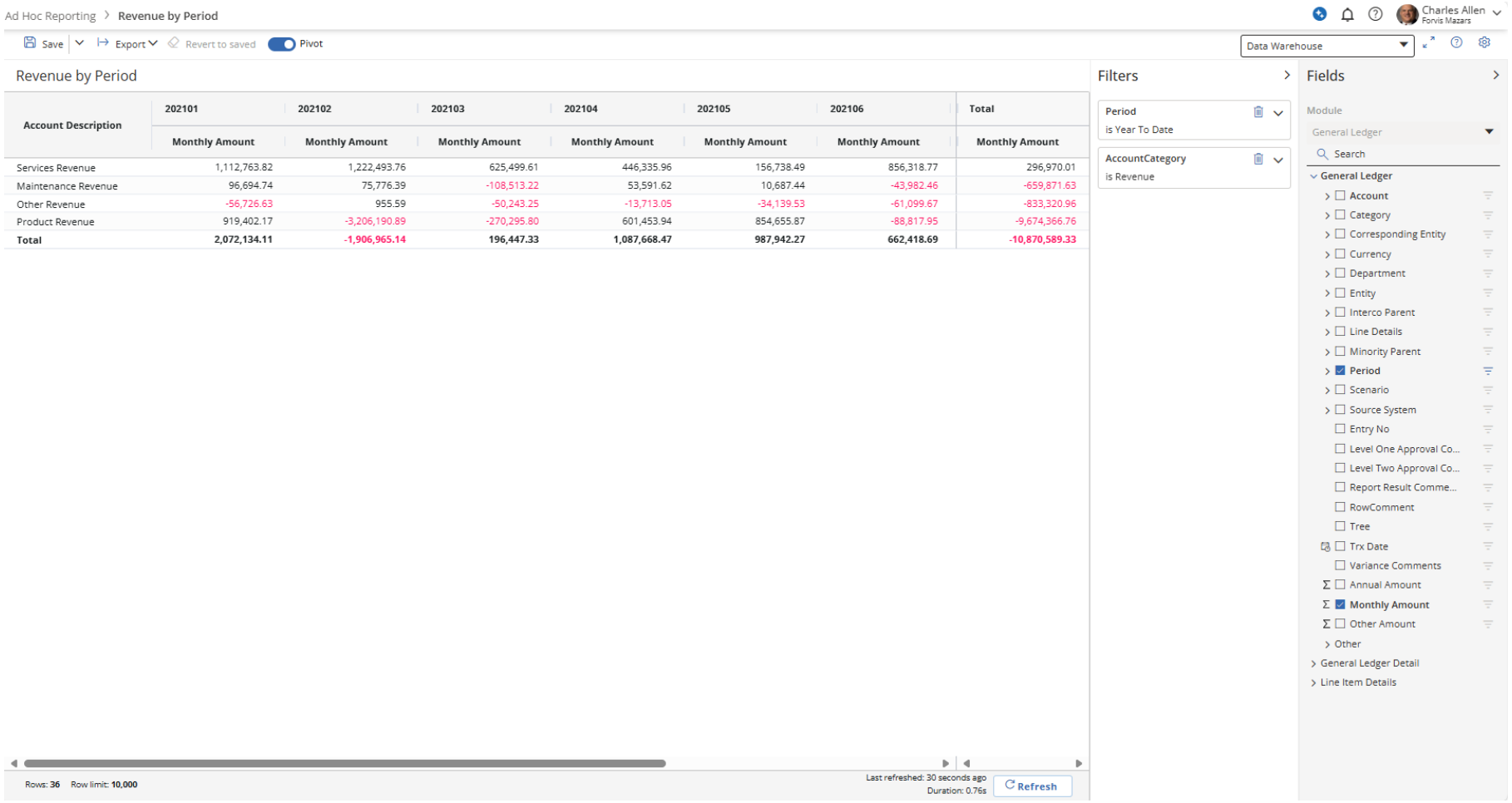
Reporting
Ad Hoc Reporting

Self-Service



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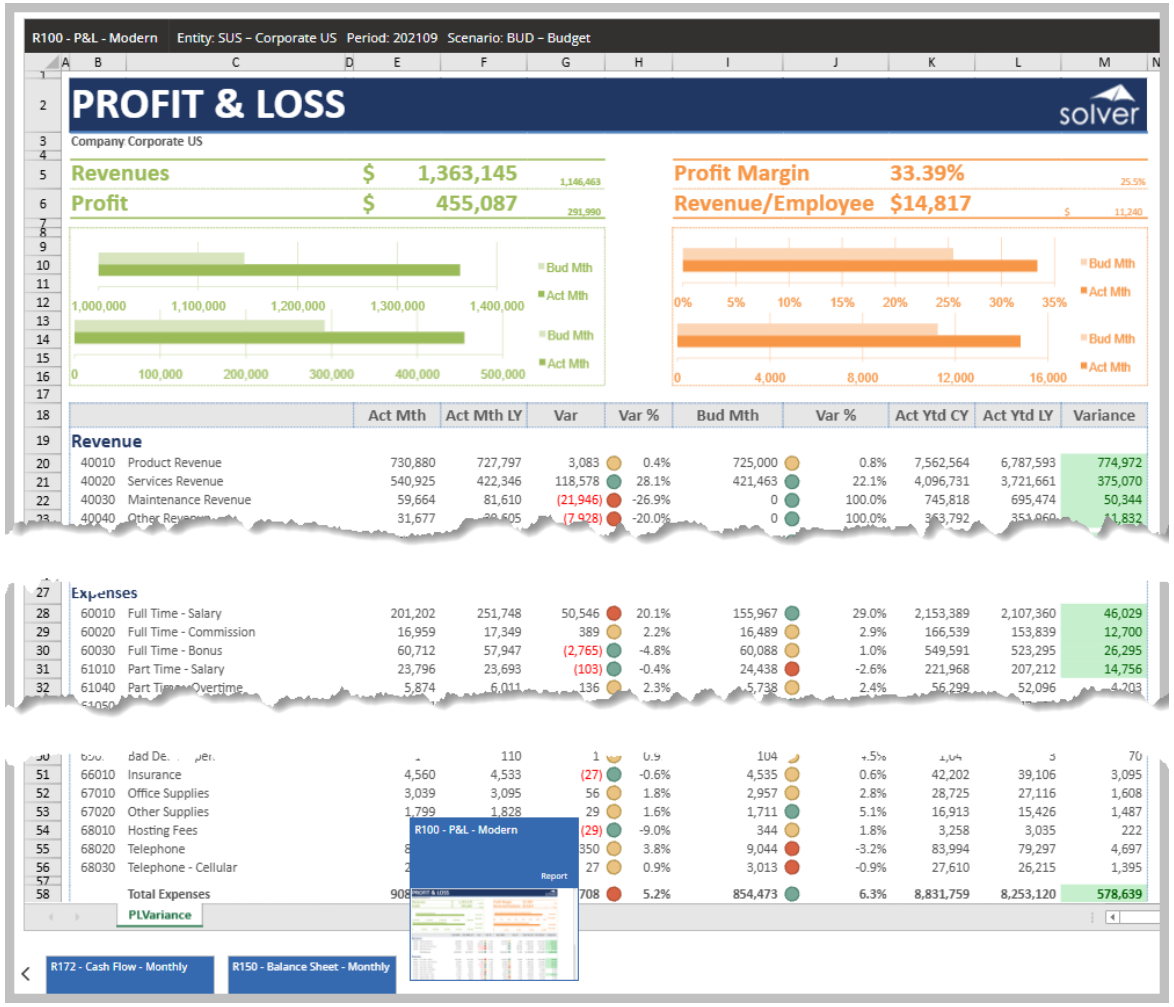
Reporting
Report Archive

Viewing Shared Reports



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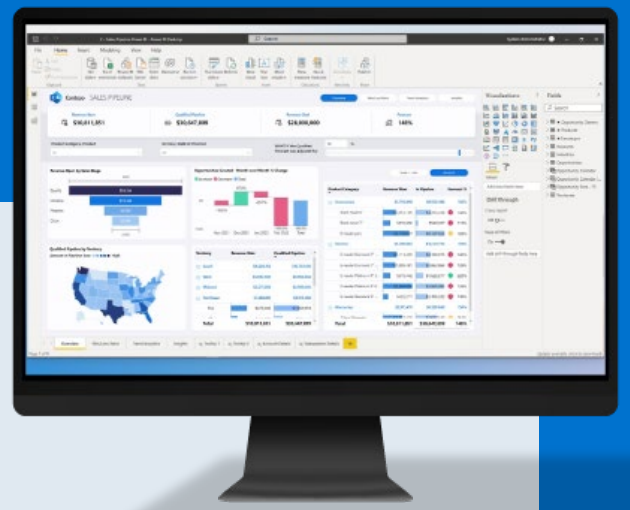
Demo

Microsoft Partner

solver



05
Planning

Planning
The Solver Experience

Components

- Excel-based design
- Driver-based
- Workflow
- Line-item details
- Comments

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Reporting
The Solver Experience

Five-Year Forecast

Profit & Loss -Five Year Forecast Template

Entity: SUS - Corporate US

		Current YTD Actual	Current Year Annualized	Current Year Forecast	Current Year Budget	2022 Forecast	2023 Forecast	2024 Forecast	2025 Forecast	2026 Forecast
REVENUE										
40010	Product Revenue	3,210,717	9,632,151	5,652,168	10,393,724	0	0	0	0	0
40020	Services Revenue	1,618,203	4,854,608	3,160,578	5,657,560	0	0	0	0	0
40030	Maintenance Revenue	316,319	948,956	549,243	1,040,925	0	0	0	0	0
	Total Sales Revenue	5,145,238	15,435,715	9,361,988	17,092,209	-	-	-	-	-
40040	Other Revenue	151,973	455,918	292,793	518,645	0	0	0	0	0
	Total Other Revenues	151,973	455,918	292,793	518,645	-	-	-	-	-
	TOTAL REVENUE	**5,297,211**	**15,891,633**	**9,654,781**	**17,610,854**	-	-	-	-	-
COST OF GOODS SOLD										
50010	COGS - Product Sales	1,056,221	3,168,662	1,949,025	3,593,001					
	Total Cost of Sales	1,056,221	3,168,662	1,949,025	3,593,001	-	-	-	-	-
	TOTAL COST OF GOODS SOLD	1,056,221	3,168,662	1,949,025	3,593,001	-	-	-	-	-
	GROSS PROFIT	**4,240,990**	**12,722,971**	**7,705,756**	**14,017,853**	-	-	-	-	-
OPERATING EXPENSES										
60010	Full Time - Salary	914,088	2,742,264	1,672,863	3,000,261					
60020	Full Time - Commission	69,467	208,400	132,755	229,580					
60030	Full Time - Bonus	231,275	693,824	430,286	767,155					
61010	Part Time - Salary	93,958	281,874	174,119	307,512					
61040	Part Time - Overtime	23,434	70,303	42,988	77,911					
61050	Part Time - Bonus	35,398	106,193	66,081	116,492					
61500	Payroll Taxes - FICA	165,997	497,991	307,751	543,530					
61510	Payroll Taxes - FUTA	23,484	70,452	44,119	77,032					
61520	Payroll Taxes - SUTA	23,287	69,861	43,350	77,027					
61530	Payroll Taxes - Workers Compensation	22,738	68,213	43,613	76,708					
61540	Benefits	4,753	14,258	8,467	15,558					
	Total Salaries and Benefits	1,607,878	4,823,633	2,966,391	5,288,766	-	-	-	-	-
62010	Marketing	1,892,953	5,678,859	3,536,017	6,243,373					
62020	Conference and seminars	16,404	49,213	30,627	53,426					
62030	Advertising	5,622	16,865	10,575	18,584					
62040	Gift and donations	570	1,710	1,054	1,862					

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Reporting
The Solver Experience

Top-Down Forecast

Profit & Loss - Top Down Forecast

Entity: SUS - Corporate US

Enter Desired Net Income >>>

Or

% Adjustment - Revenue (Optional)

% Adjustment - COGS (Optional)

% Adjustment - Oper. Exp. (Optional)

% Adjustment - Non- Oper. Exp. (Optional)

Account No.	Description	09 - 2021 Actual YTD	Annualized	Adjusted Forecast	Total Forecast
REVENUE					
	Total Sales Revenue	12,405,113	16,540,150	16,540,150	16,540,150
	Total Other Revenues	363,792	485,056	485,056	485,056
	TOTAL REVENUE	**12,768,904**	**17,025,206**	**17,025,206**	**17,025,206**
COST OF GOODS SOLD					
	Total Cost of Sales	2,562,847	3,417,130	3,417,130	3,417,130
	TOTAL COST OF GOODS SOLD	**2,562,847**	**3,417,130**	**3,417,130**	**3,417,130**
	GROSS PROFIT	**10,206,057**	**13,608,076**	**13,608,076**	**13,608,076**
OPERATING EXPENSES					
	Total Salaries and Benefits	3,799,950	5,066,600	5,066,600	5,066,600
	Total Sales and Marketing	4,536,967	6,049,290	6,049,290	6,049,290
	Total Travel and Entertainment	28,746	38,329	38,329	38,329
	Total Professional Fees	212,352	283,136	283,136	283,136
	Total Bad Debt	1,043	1,391	1,391	1,391
	Total Business Insurance	42,202	56,269	56,269	56,269
	Total Office Supplies	45,637	60,850	60,850	60,850
	Total Telephone and Internet	114,861	153,148	153,148	153,148
	Total Rent and Utilities	97,849	130,466	130,466	130,466
	Total Admin Expenses	116,809	155,745	155,745	155,745
	TOTAL OPERATING EXPENSES	**8,996,417**	**11,995,223**	**11,995,223**	**11,995,223**

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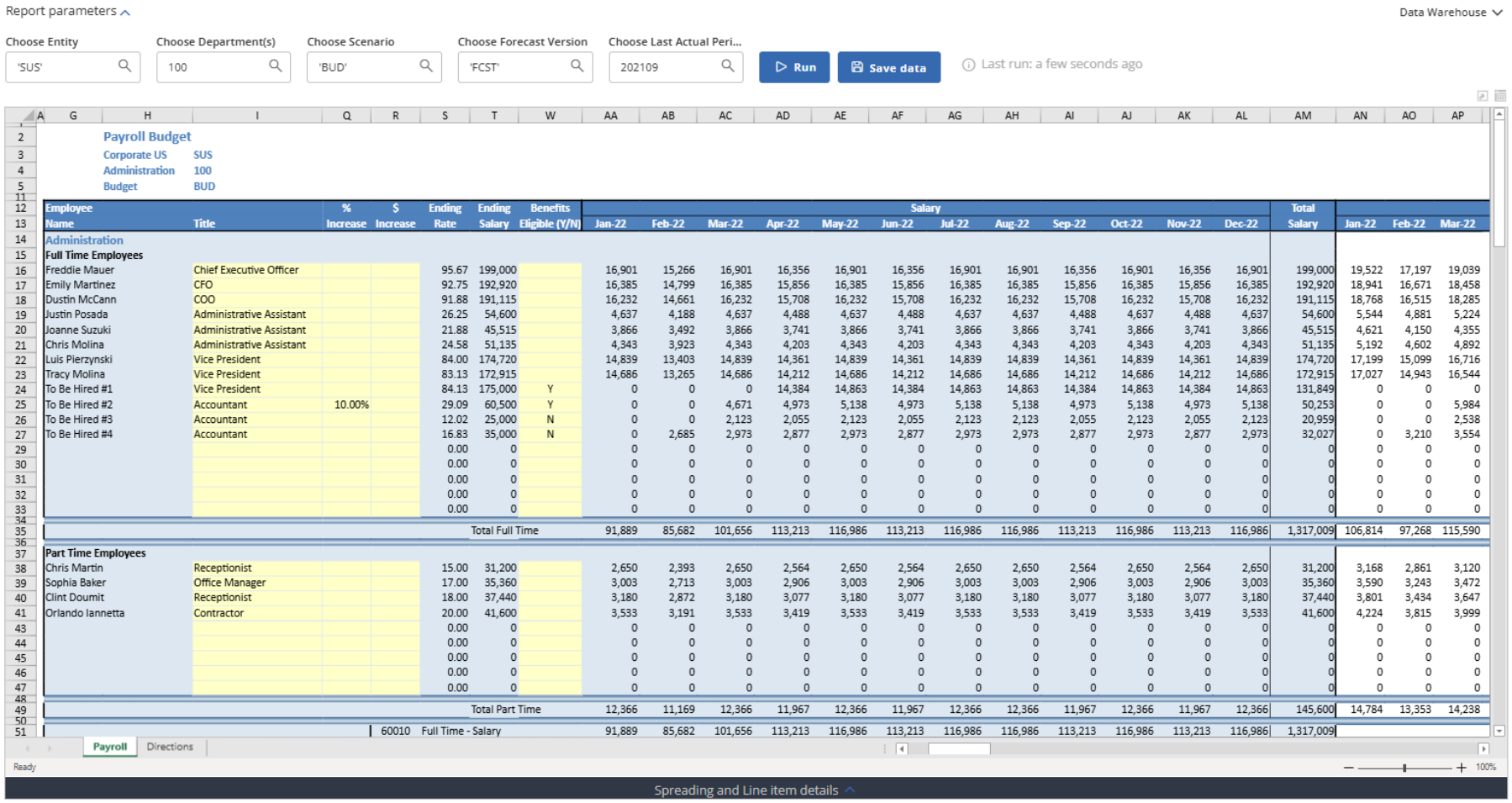
Reporting
The Solver Experience

Payroll Budget



Employee Name	Title	% Increase	$ Increase	Ending Rate	Ending Salary	Benefits Eligible (Y/N)	Salary Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Total Salary	Jan-22	Feb-22	Mar-22
Administration																						
Full Time Employees																						
Freddie Mauer	Chief Executive Officer			95.67	199,000		16,901	15,266	16,901	16,356	16,901	16,356	16,901	16,901	16,356	16,901	16,356	16,901	199,000	19,522	17,197	19,039
Emily Martinez	CFO			92.75	192,920		16,385	14,799	16,385	15,856	16,385	15,856	16,385	16,385	15,856	16,385	15,856	16,385	192,920	18,941	16,671	18,458
Dustin McCann	COO			91.88	191,115		16,232	14,661	16,232	15,708	16,232	15,708	16,232	16,232	15,708	16,232	15,708	16,232	191,115	18,768	16,515	18,285
Justin Posada	Administrative Assistant			26.25	54,600		4,637	4,188	4,637	4,488	4,637	4,488	4,637	4,637	4,488	4,637	4,488	4,637	54,600	5,544	4,881	5,224
Joanne Suzuki	Administrative Assistant			21.88	45,515		3,866	3,492	3,866	3,741	3,866	3,741	3,866	3,866	3,741	3,866	3,741	3,866	45,515	4,621	4,150	4,355
Chris Molina	Administrative Assistant			24.58	51,135		4,343	3,923	4,343	4,203	4,343	4,203	4,343	4,343	4,203	4,343	4,203	4,343	51,135	5,192	4,602	4,892
Luis Pierzynski	Vice President			84.00	174,720		14,839	13,403	14,839	14,361	14,839	14,361	14,839	14,839	14,361	14,839	14,361	14,839	174,720	17,199	15,099	16,716
Tracy Molina	Vice President			83.13	172,915		14,686	13,265	14,686	14,212	14,686	14,212	14,686	14,686	14,212	14,686	14,212	14,686	172,915	17,027	14,943	16,544
To Be Hired #1	Vice President			84.13	175,000	Y	0	0	0	14,384	14,863	14,384	14,863	14,863	14,384	14,863	14,384	14,863	131,849	0	0	0
To Be Hired #2	Accountant	10.00%		29.09	60,500	Y	0	0	4,671	4,973	5,138	4,973	5,138	5,138	4,973	5,138	4,973	5,138	50,253	0	0	5,984
To Be Hired #3	Accountant			12.02	25,000	N	0	0	2,123	2,055	2,123	2,055	2,123	2,123	2,055	2,123	2,055	2,123	20,959	0	0	2,538
To Be Hired #4	Accountant			16.83	35,000	N	0	2,685	2,973	2,877	2,973	2,877	2,973	2,973	2,877	2,973	2,877	2,973	32,027	0	3,210	3,554
				0.00	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
				0.00	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
				0.00	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
				0.00	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
				0.00	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Total Full Time						91,889	85,682	101,656	113,213	116,986	113,213	116,986	116,986	113,213	116,986	113,213	116,986	1,317,009	106,814	97,268	115,590
Part Time Employees																						
Chris Martin	Receptionist			15.00	31,200		2,650	2,393	2,650	2,564	2,650	2,564	2,650	2,650	2,564	2,650	2,564	2,650	31,200	3,168	2,861	3,120
Sophia Baker	Office Manager			17.00	35,360		3,003	2,713	3,003	2,906	3,003	2,906	3,003	3,003	2,906	3,003	2,906	3,003	35,360	3,590	3,243	3,472
Clint Doumit	Receptionist			18.00	37,440		3,180	2,872	3,180	3,077	3,180	3,077	3,180	3,180	3,077	3,180	3,077	3,180	37,440	3,801	3,434	3,647
Orlando Iannetta	Contractor			20.00	41,600		3,533	3,191	3,533	3,419	3,533	3,419	3,533	3,533	3,419	3,533	3,419	3,533	41,600	4,224	3,815	3,999
				0.00	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
				0.00	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
				0.00	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
				0.00	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
				0.00	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Total Part Time						12,366	11,169	12,366	11,967	12,366	11,967	12,366	12,366	11,967	12,366	11,967	12,366	145,600	14,784	13,353	14,238
	60010 Full Time - Salary						91,889	85,682	101,656	113,213	116,986	113,213	116,986	116,986	113,213	116,986	113,213	116,986	1,317,009			

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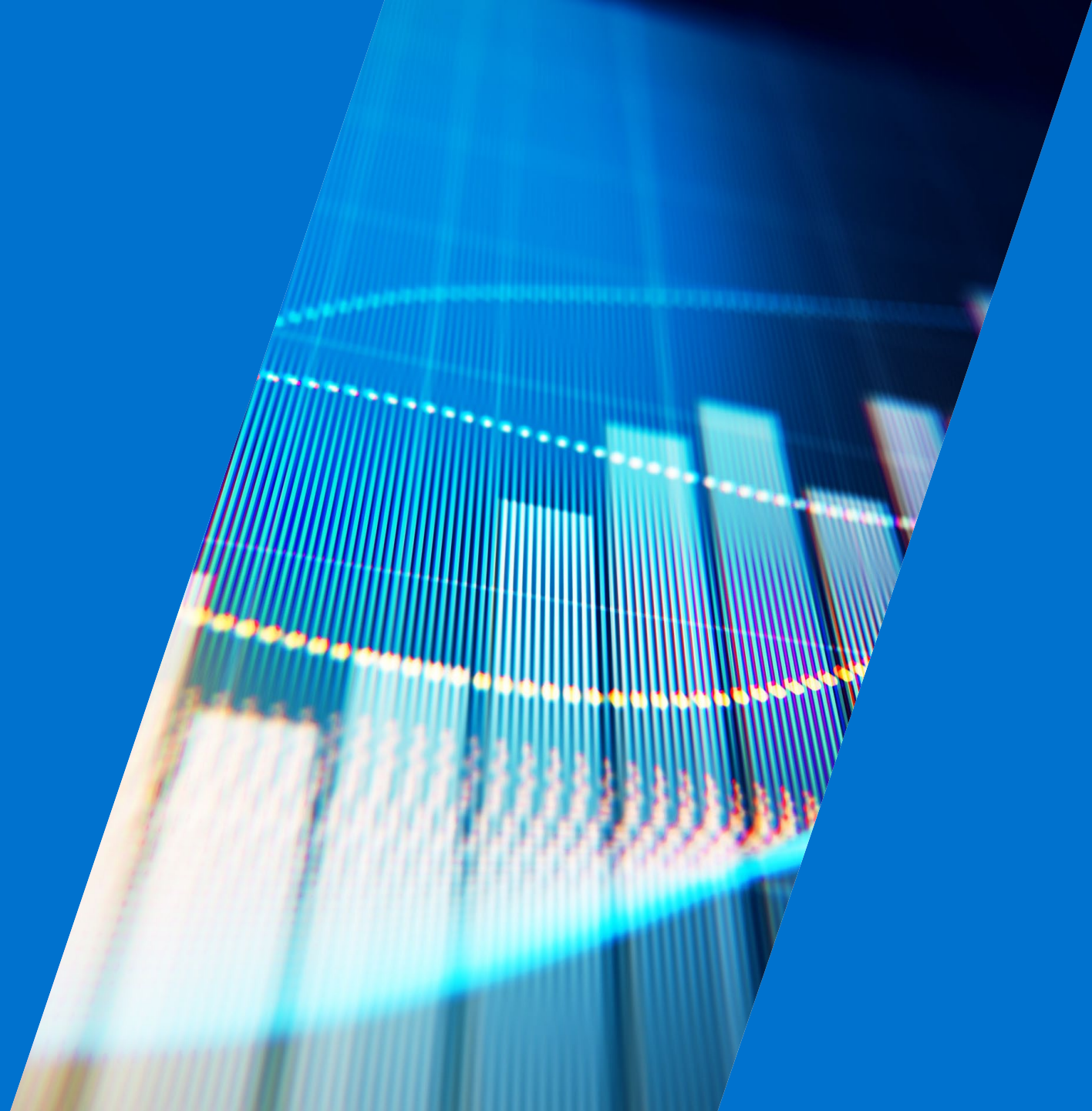
06

Power BI



Power BI
Connection & Reporting

Power BI Connector

API

Fact Tables

Dimensions

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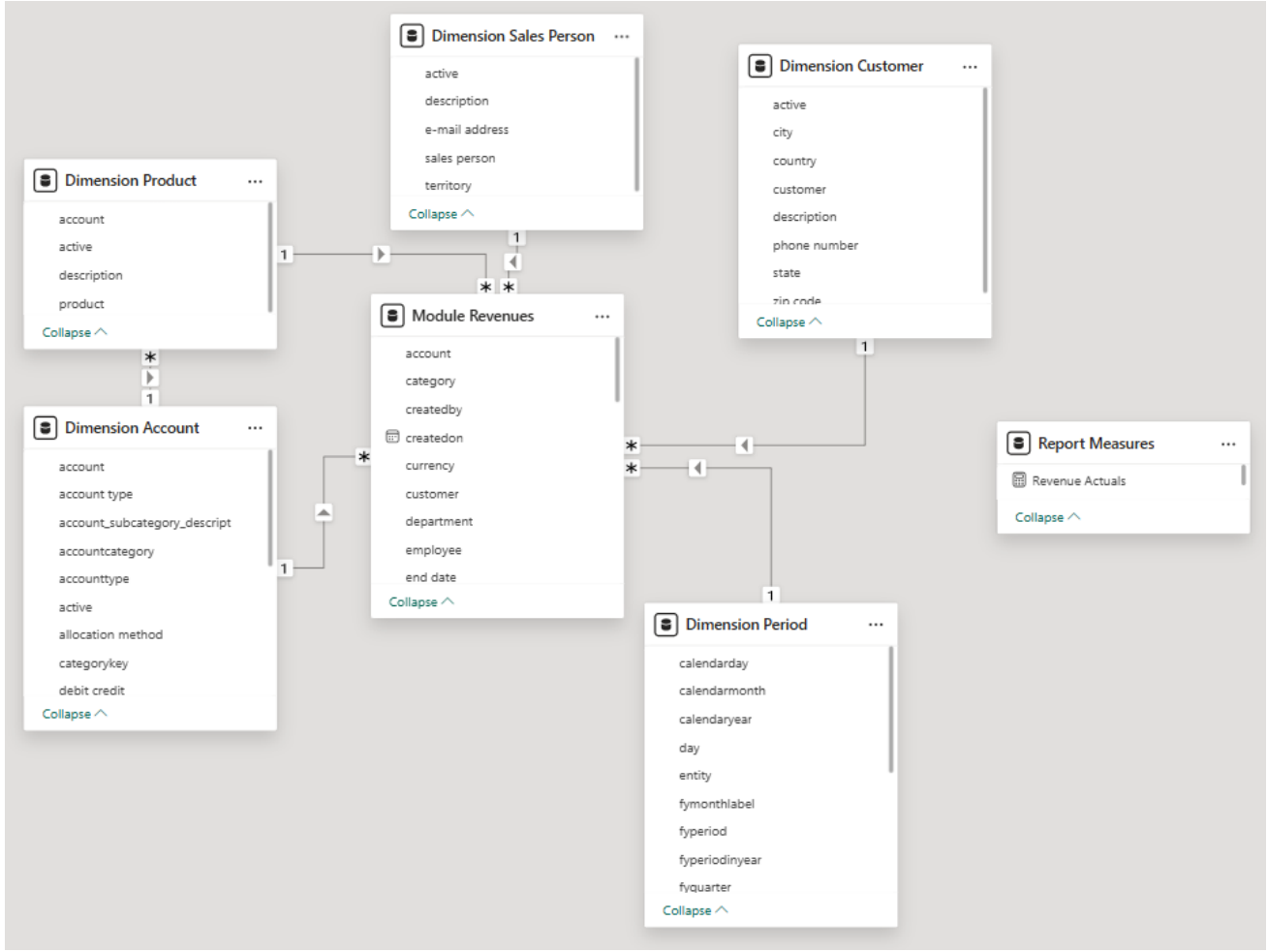
Power BI
Model View



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Power BI
Examples

Dashboard Category	Revenues	Expenses	Margins	Balance Sheet	KPIs
Variance Analysis	i	i	i	i	i
Exceptions	i	i	i	i	
Budget Analysis	i	i	i	i	
Auto Forecast	i	i	i	i	i
Combo (Var and Trend)	i	i	i	i	i
24 Month Trend	i	i	i	i	i
36 Month Trend	i	i	i	i	i
48 Month Trend	i	i	i	i	i
8 Quarter Rolling	i	i	i	i	i
Business Comparison	i	i	i	i	i
Internal Benchmarking	i	i	i		i

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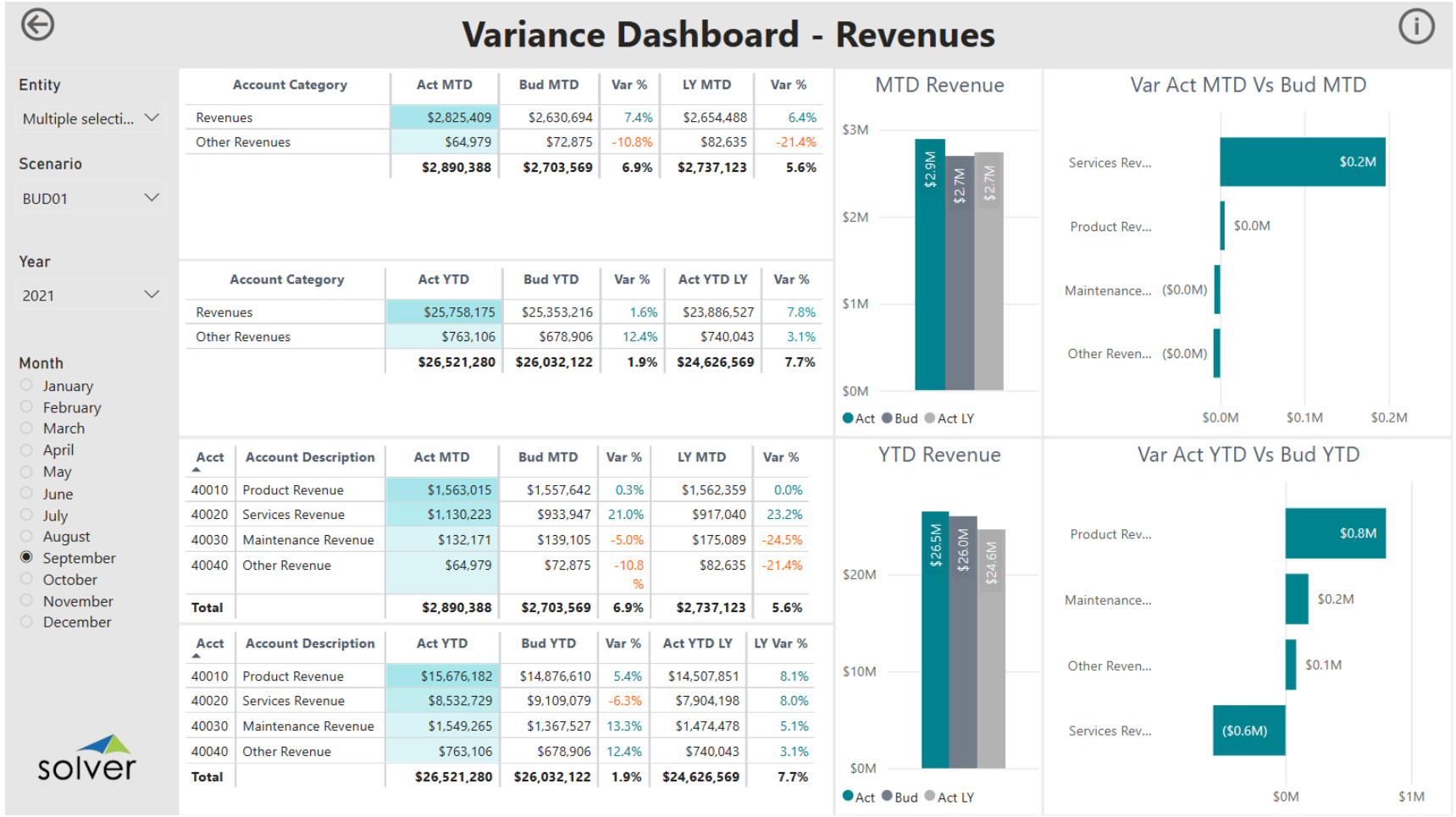
Power BI
Examples

Variance Dashboard – Revenues



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Q&A

Business Technology Services

Questions?

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