

Visualize Your Solver Data With Power BI

Discover how Solver xFP&A and Power BI Can Work Together

November 2026

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Global Presence

Top 10
Global Network*

$5bn
Combined Revenue (2023)

100+
Combined Countries & Territories

400+
Combined Offices & Locations

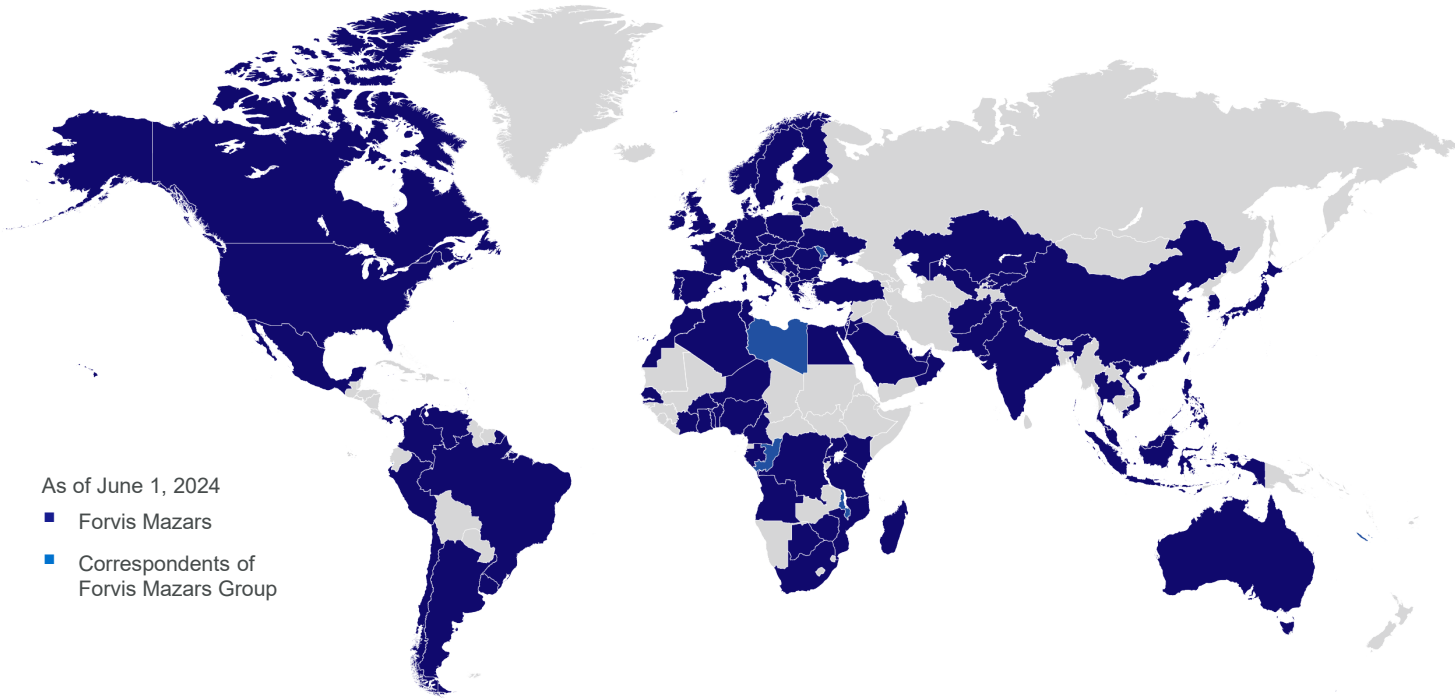
1,800+
Combined Partners

40,000+
Combined Employees

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

2023 revenues: FORVIS $1.7bn (€1.6bn), Mazars (estimated) $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.



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

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U.S. Presence

Leading U.S. Firm

$2.24B
Revenue (FY 2025)[1]

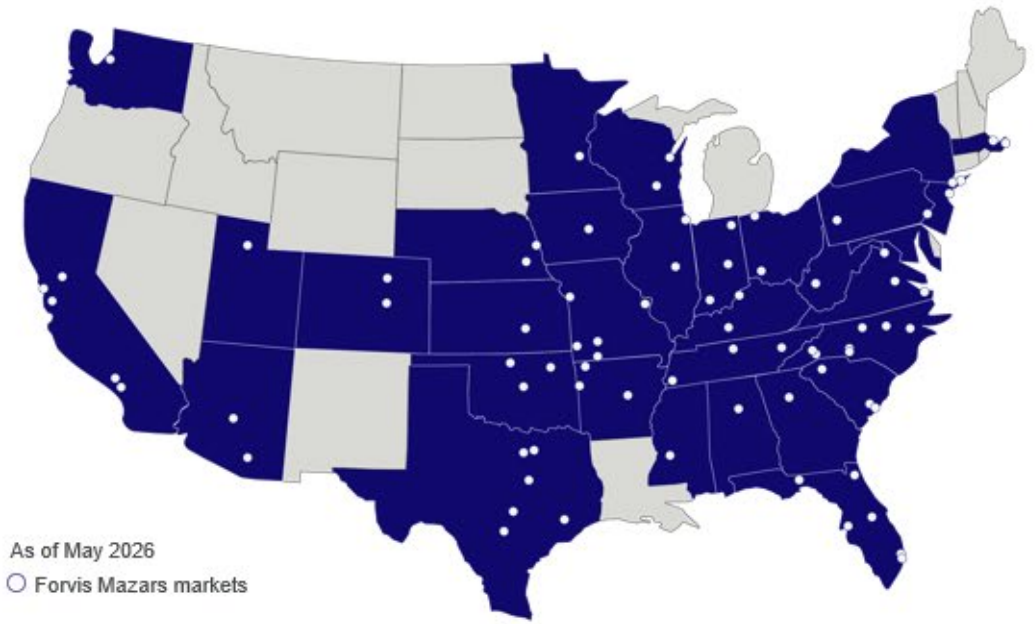
77
Markets

31
States

600+
Partners & Principals

7,000+
Employees

84 Net Promoter Score®[2]
("World-Class" Ranking)



As of May 2026
○ Forvis Mazars markets

Alabama
Birmingham

Arizona
Phoenix
Tucson

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Francisco
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Fort Lauderdale
Jacksonville
Orlando
Tallahassee
Tampa Bay

Georgia
Atlanta

Illinois
Chicago
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston
Brewster

Minnesota
Minneapolis

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Island
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro
Greenville
Hendersonville
Raleigh

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Philadelphia-Metro Area
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

Washington D.C. Metro Area

Washington
Seattle

West Virginia
Charleston

Wisconsin
Appleton
Madison

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[1]FY 2025 revenue: period ending 5/31/25.
[2]FYE25 Relational Survey NPS results reflect responses from participating clients.
Updated 06/08/2026

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Business Technology Services

We solve business challenges and support innovation through technology solutions.

At Forvis Mazars, our Business Technology Services team helps organizations align people, processes, data, and technology to drive better business outcomes. We provide expertise in ERP, CRM, AI, automation, analytics, and cloud technologies, helping clients transform operations, gain actionable insights, and navigate change with confidence.

SERVICES INCLUDE

- **Solution Assessment and Selection**
- **Implementation Project Rescues**
- **System Implementation and Integration**
- **Process and Technology Design**
- **Business Intelligence (BI) and Analytics**
- **Robotic Process Automation (RPA)**
- **AI and Copilot**
- **Custom Application Development**
- **Upgrades, Enhancements, and Automation**
- **Training, Monitoring, and Support**
- **Managed Services**
- **Digital Transformation Strategy**

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Technology Partnerships

Certified expertise across the platforms that run your business

Microsoft Partner

Microsoft

- Dynamics 365 Finance & Supply Chain Management, Business Central
- Dynamics 365 CRM: Sales, Service, Field Service, Marketing
- Dynamics AX, GP, NAV
- Power Platform and Copilot
- Azure and Microsoft 365

ORACLE NETSUITE
Solution Provider

NetSuite

- NetSuite ERP implementation and optimization
- ISV add-on selection and management
- Release and upgrade management

Sage Partner

Sage

- Sage Intacct
- Sage 100 and Sage 500
- Sage Fixed Assets

Trimble

Trimble

- Trimble Construction One
- Viewpoint, Spectrum, and Vista
- Project operations and job costing

solver

- Extended financial planning and analysis for faster, data-driven decisions
- Automated reporting, budgeting, and forecasting beyond spreadsheets
- A unified data warehouse for business intelligence
- AI Copilot for anomaly, trend, and root-cause analysis
- Generated narratives, dashboards, and KPI visuals

2026
Lifetime Achievement in
Excellence & Marketing Award

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Our Partnership With Solver

Certified xFP&A expertise - and Solver's 2026 Lifetime Achievement Award

Solver xFP&A

- Extended financial planning and analysis for faster, data-driven decisions
- Automated reporting, budgeting, and forecasting beyond spreadsheets
- A unified data warehouse for business intelligence
- AI Copilot for anomaly, trend, and root-cause analysis
- Generated narratives, dashboards, and KPI visuals

What We Deliver

- Solver implementation, migration, and enhancement
- Report, budget, and forecast design built to your business
- Integration with Microsoft Dynamics, Sage, NetSuite, and more
- Power BI dashboards, training, and support

Why Forvis Mazars

- Certified Solver experience and a recipient of Solver's Technical Evangelist of the Year award
- Monthly Solver webinars that routinely draw hundreds of attendees
- Unmatched Client Experience: we listen to understand and consult with purpose

2026 Solver Award

- Lifetime Achievement in Excellence & Marketing Award from Solver
- Presented to Charles Allen and the Forvis Mazars marketing team in Nashville
- Recognizing outreach across the Solver, Dynamics, and Sage communities

Signs Solver may be the right fit for your organization

Spreadsheet jugglers held back by manual processes · Data spread across many systems · Reports stitched together in Excel · Forecasts that arrive too late to act on

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Today’s Presenter



Charles Allen

Senior Managing Consultant

charles.allen@us.forvismazars.com

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Objectives

1. Recognize the value of visualizing Solver data through Power BI dashboards and reports.
2. Describe techniques for transforming financial and operational data into meaningful visual insights.
3. Evaluate how effective data visualization can strengthen reporting and support better business decisions.



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Agenda

01 **Introduction**

02 **Getting and Shaping Data**

03 **Connecting to Solver**

04 **Creating Reports in Power BI**



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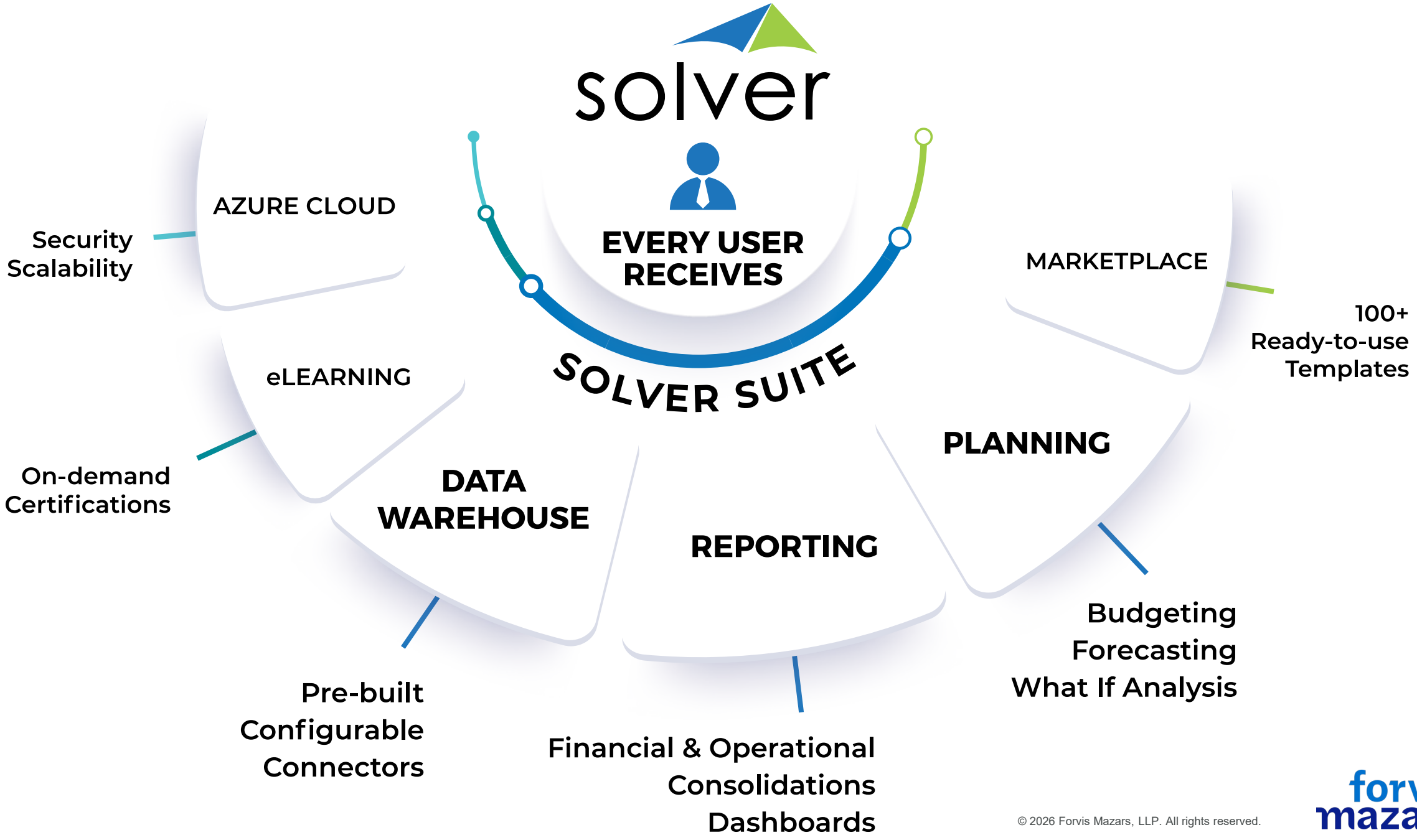
Introduction



Introduction
What is Solver?

- AI-driven
- Reporting and Planning
- Cloud-based
- Data Warehouse

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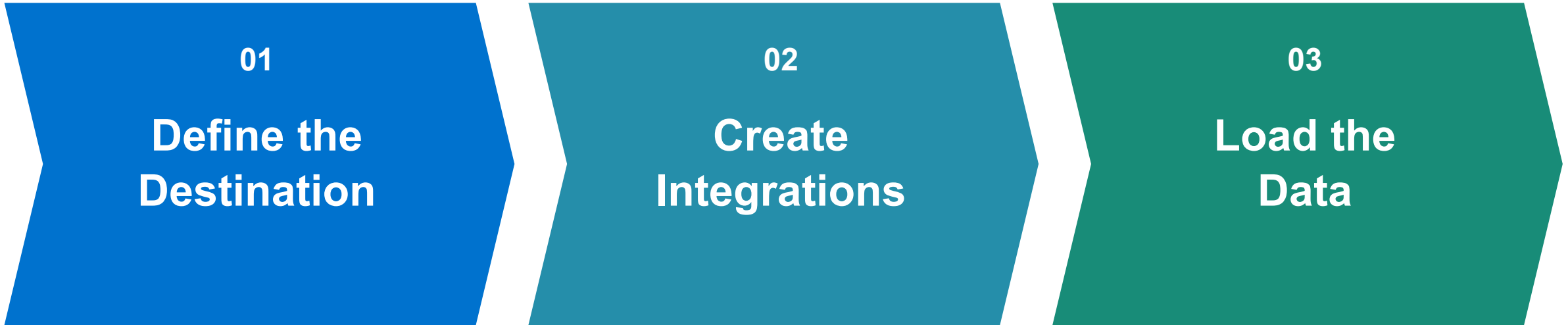
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Getting and Shaping Data



Getting and Shaping Data
Data for Reporting



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Define the Destination



Dimensions



Modules



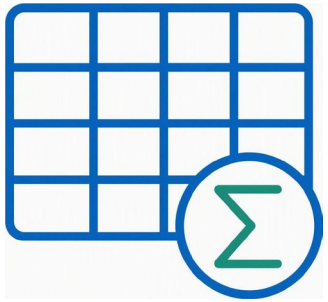
Module Schema



Period

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Dimensions



Tables used for summarizing data



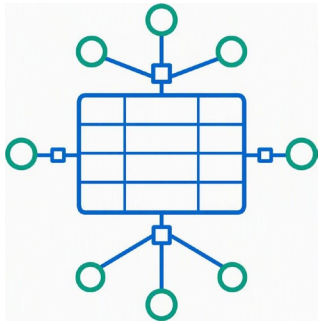
Doesn’t change much



Master data

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Modules



Also known as
fact tables



Store the data
to be summarized



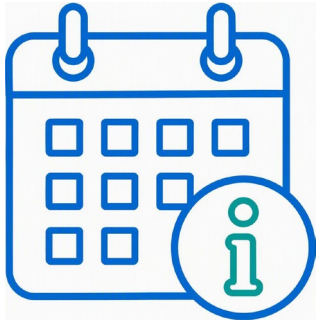
Transactions
or activity

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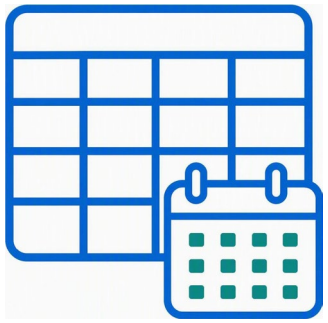
Periods



Stores a record for every day



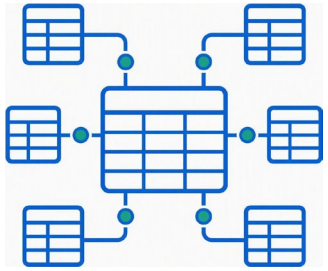
Contains information about the dates



Can be used as a date table

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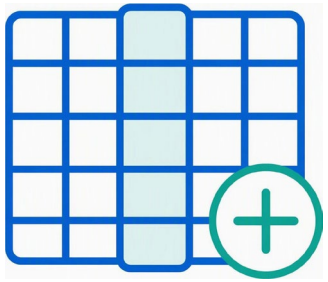
Module Schema



Identifies which dimensions are used in modules



Dimensions can be shared between modules



Create columns in modules

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Putting it All Together
General Ledger Data

Dimensions

- Accounts
- Entity
- Currency
- Period
- Departments
- Scenario
- Other

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Putting it All Together
General Ledger Data

Dimension

Code	Description	Demo Model Notes	Account Type	Account Category	Active	Offset Account	Rollup Level 1	Rollup Level 2	Opex Entry	Allocation Method	Originating Account	Status
61040	Part Time - Overti...		PLC	Expenses	☑		01. Salaries and B...		No	Headcount		
61050	Part Time - Bonus		PLC	Expenses	☑		01. Salaries and B...		No	Headcount		
61500	Payroll Taxes - FICA		PLC	Expenses	☑		01. Salaries and B...		No	Headcount		
61510	Payroll Taxes - FU...		PLC	Expenses	☑		01. Salaries and B...		No	Headcount		
61520	Payroll Taxes - SU...		PLC	Expenses	☑		01. Salaries and B...		No	Headcount		
61530	Payroll Taxes - W...		PLC	Expenses	☑		01. Salaries and B...		No	Headcount		
61540	Benefits		PLC	Expenses	☑		01. Salaries and B...		No	Headcount		
62010	Marketing		PLC	Expenses	☑		02. Sales and Mar...			Headcount		
62020	Conference and s...		PLC	Expenses	☑		02. Sales and Mar...			Headcount		
62030	Advertising		PLC	Expenses	☑		02. Sales and Mar...			Headcount		
62040	Gift and donations		PLC	Expenses	☑		02. Sales and Mar...			Headcount		
63010	Travel		PLC	Expenses	☑		03. Travel and Ent...		No	Headcount		
63020	Special events		PLC	Expenses	☑		03. Travel and Ent...			Headcount		
64010	Consulting		PLC	Expenses	☑		04. Professional F...			Headcount		
64020	Audit and Accoun...		PLC	Expenses	☑		04. Professional F...			Headcount		
64030	Legal		PLC	Expenses	☑		04. Professional F...			Headcount		

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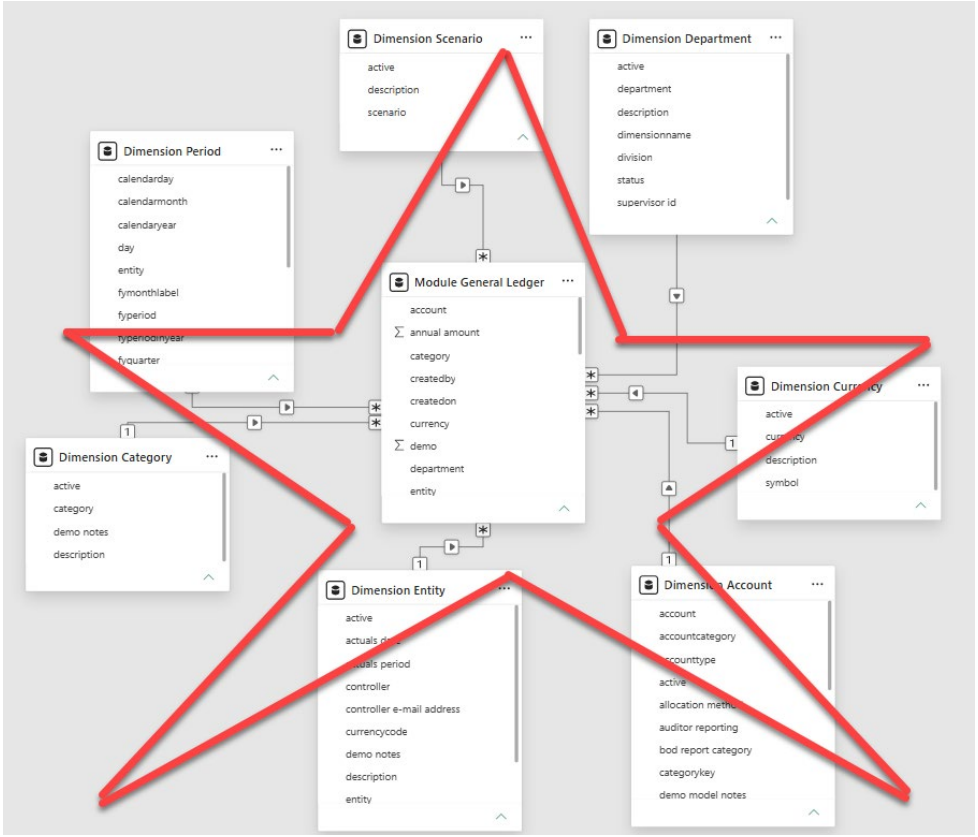
Putting it All Together
General Ledger Data

Module Columns

- Monthly Amount
- Annual Amount
- Transaction ID
- Row Comment
- Dimension Columns

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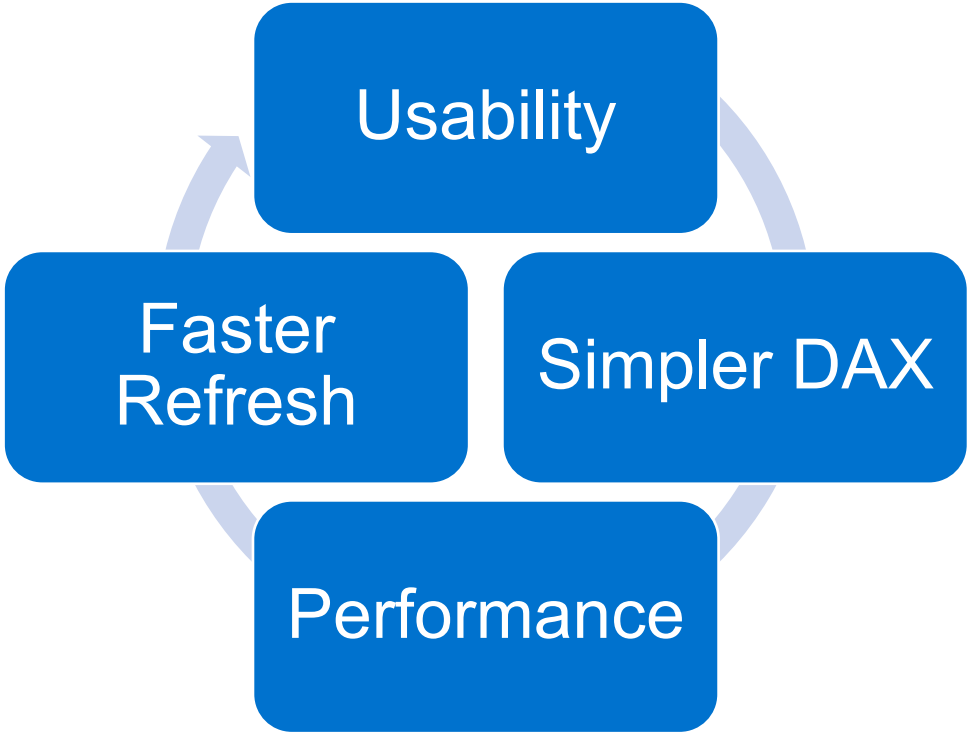
Putting it All Together
General Ledger Data



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Putting it All Together
General Ledger

Star Schema Benefits



[Understand star schema and the importance for Power BI - Power BI | Microsoft Learn]

[Why Power BI loves a Star Schema]

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LIVE WALKTHROUGH

Demo

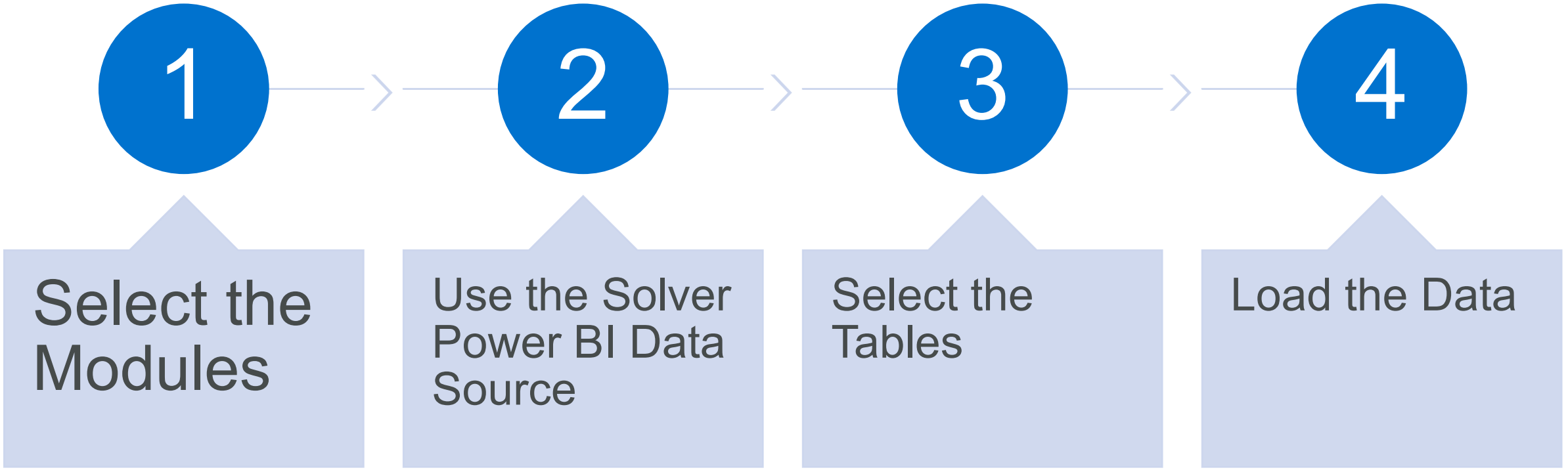


Connecting to Solver



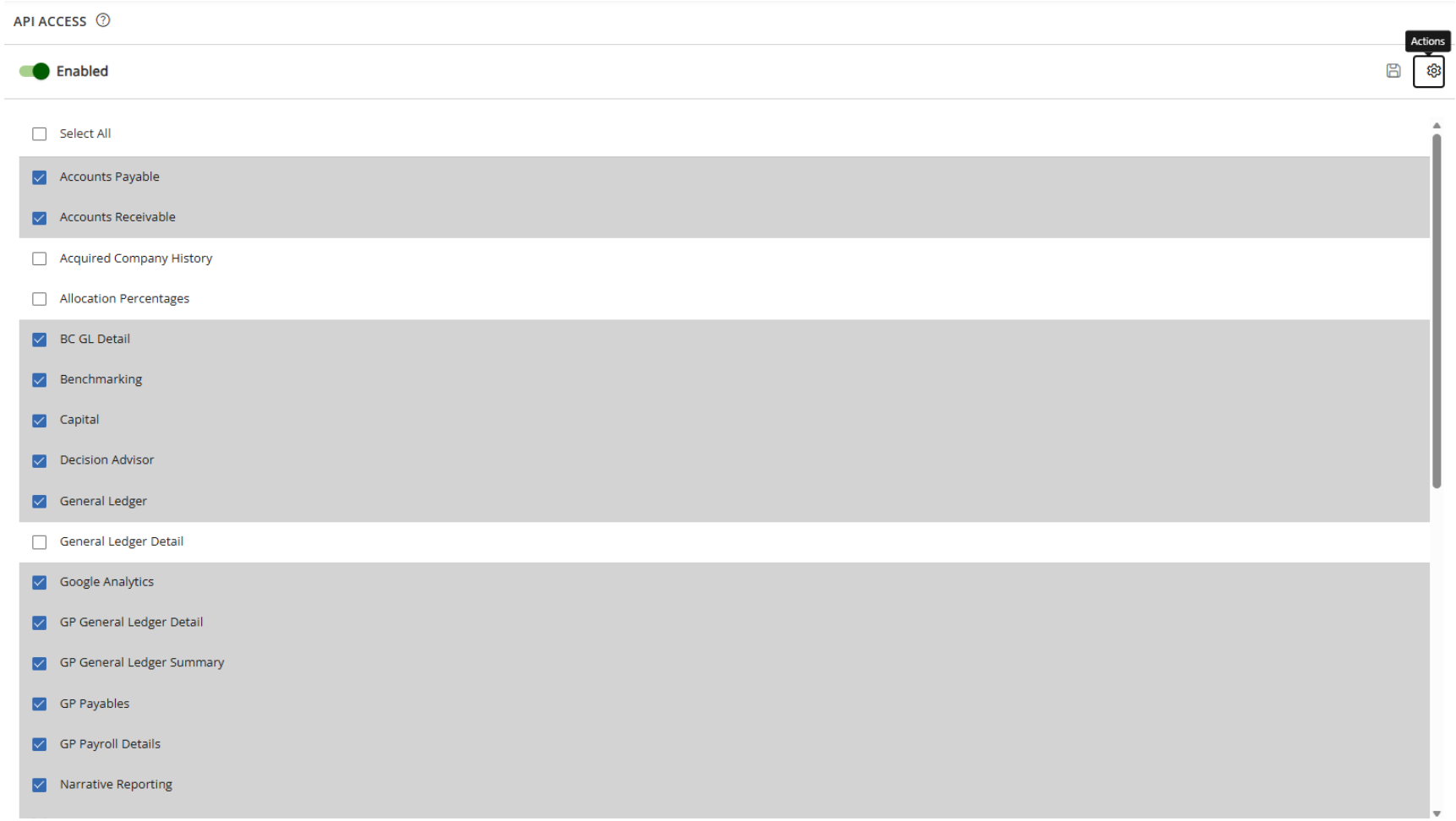
Creating Reports in Power BI

Steps to Connecting to Solver



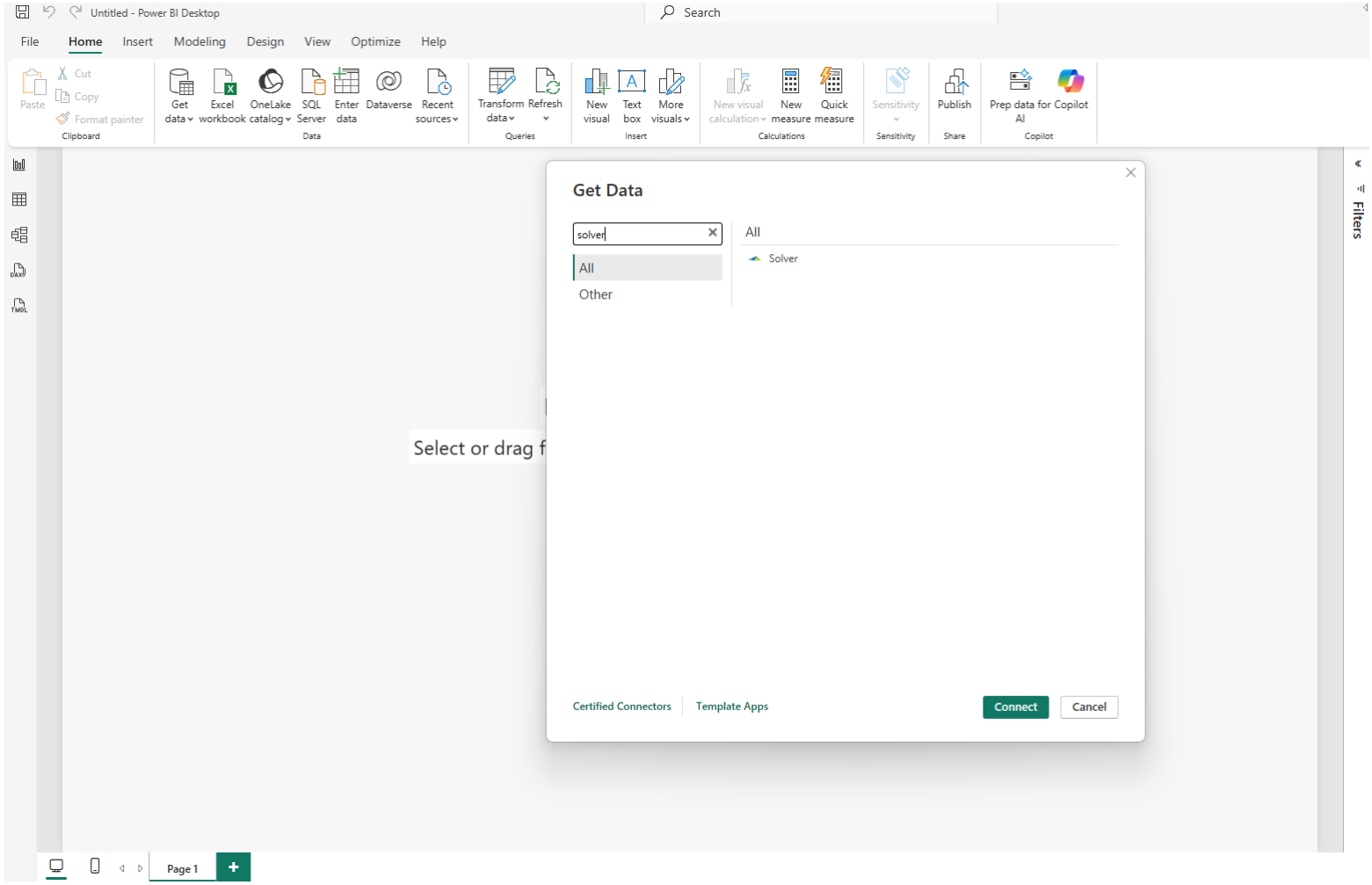
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Select the Tables



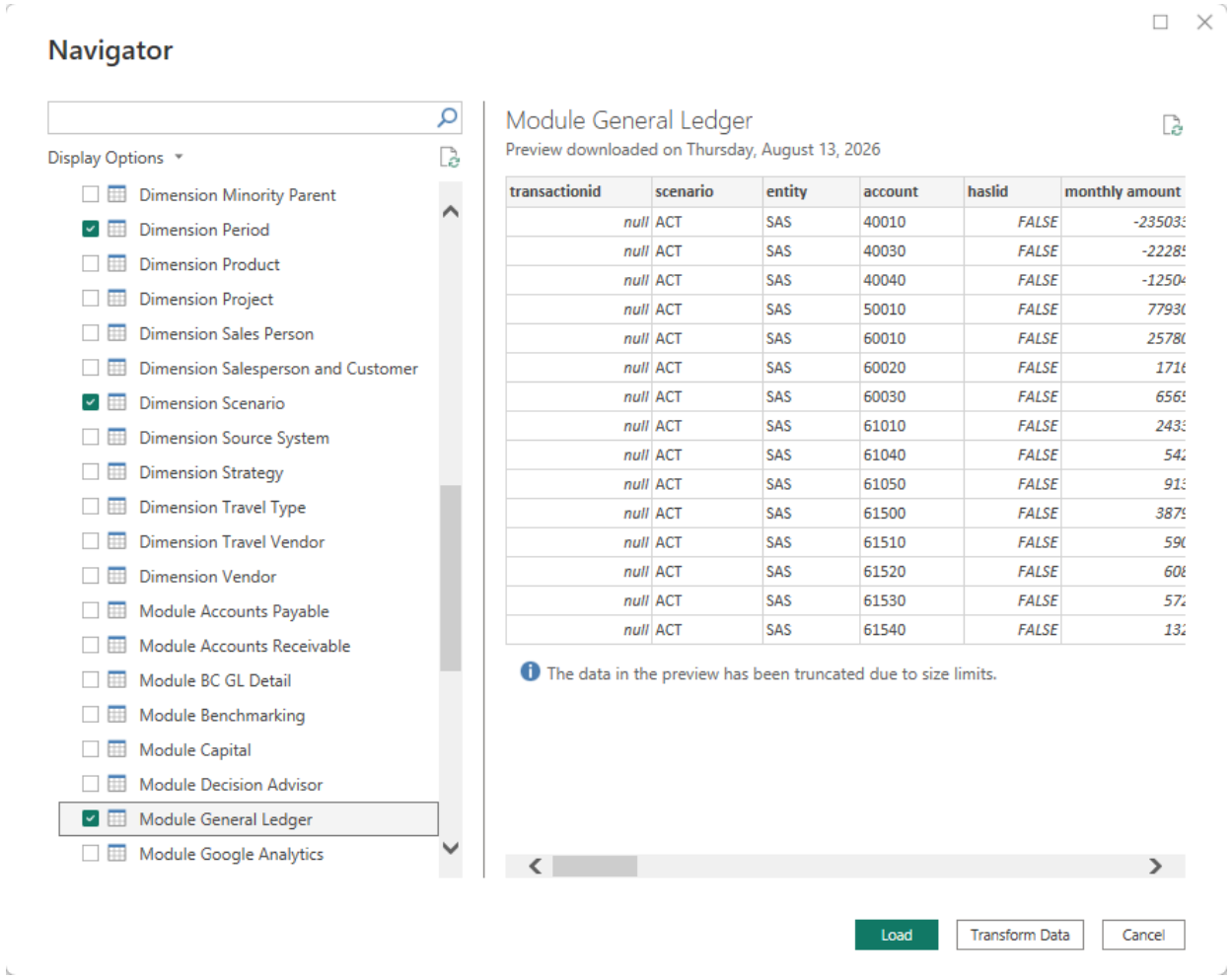
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Use the Solver Power BI Data Source



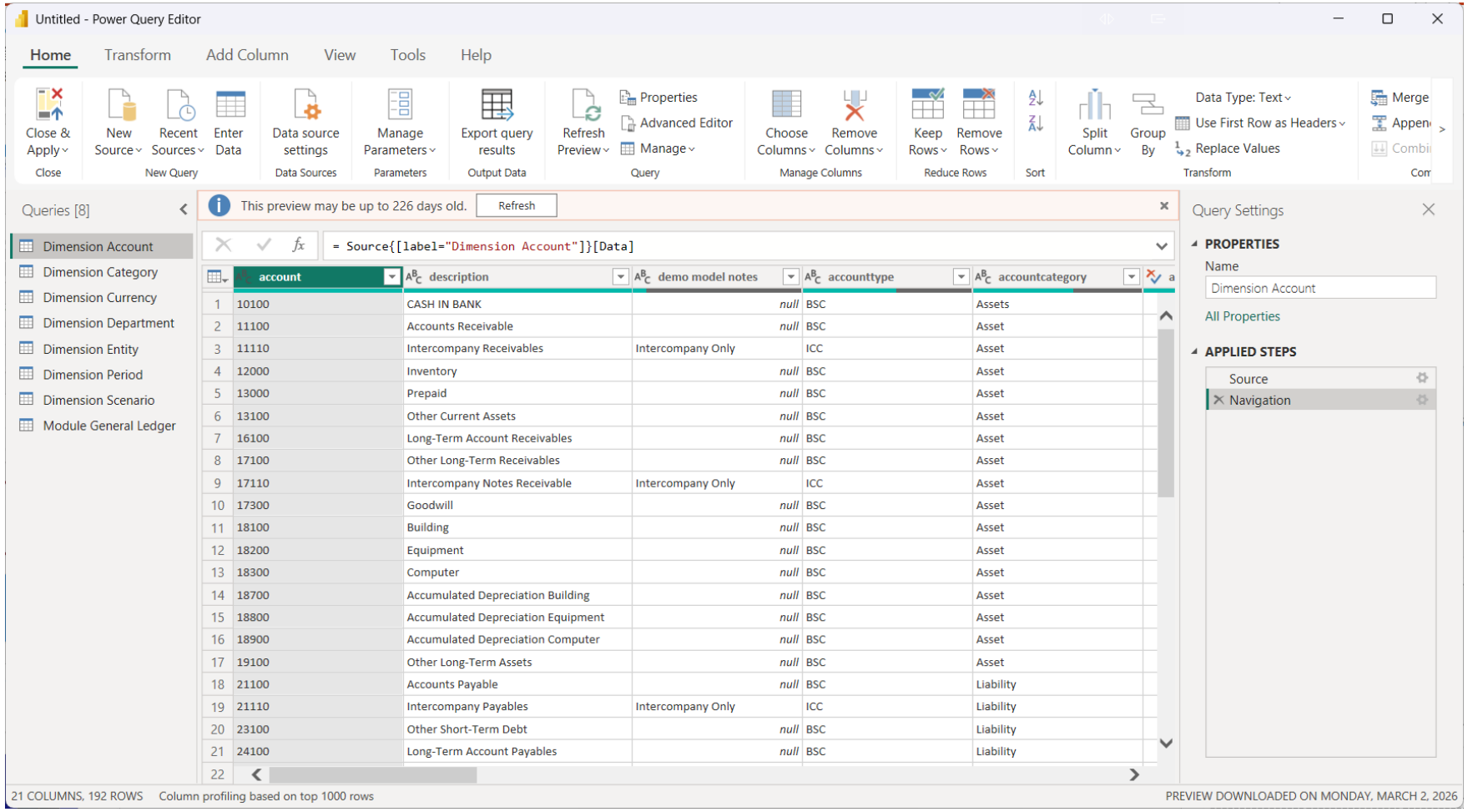
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Select the Tables



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Load the Data



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Building Reports



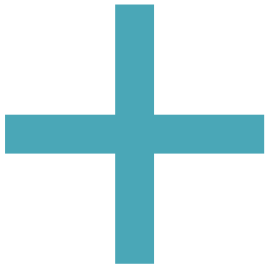
Building Reports



Create Measures



Add Visualizations



Add Slicers

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Building Reports
Example

Solver General Ledger Revenue Amounts

Date
1/1/2021 9/30/2021

	Month	January		February		March		April		May		June		July		August		September		Tota
Account	Description	YTD Revenue	LYTD Revenue	YTD Revenue	LYTD Revenue	YTD Revenue	LYTD Revenue	YTD Revenue	LYTD Revenue	YTD Revenue	LYTD Revenue	YTD Revenue	LYTD Revenue	YTD Revenue	LYTD Revenue	YTD Revenue	LYTD Revenue	YTD Revenue	LYTD Revenue	YTD
40010	Product Revenue	$4,636,182	$4,429,260	$8,612,598	$9,029,739	$13,624,715	$13,624,110	$17,518,803	$18,684,405	$21,310,486	$23,705,768	$27,346,218	$29,429,612	$32,939,113	$35,470,075	$38,587,074	$40,203,341	$42,543,299	$44,999,406	$4
40020	Services Revenue	$2,455,781	$2,467,199	$4,594,791	$4,969,375	$7,064,068	$7,557,740	$9,018,925	$10,302,680	$11,117,917	$12,875,285	$14,078,559	$15,982,726	$16,702,027	$19,337,155	$19,696,831	$21,899,290	$22,683,203	$24,751,644	$2
40030	Maintenance Revenue	$455,177	$442,190	$858,731	$928,225	$1,358,623	$1,424,710	$1,737,810	$1,943,094	$2,085,183	$2,428,420	$2,656,168	$2,997,647	$3,147,232	$3,595,655	$3,721,196	$4,052,199	$4,045,862	$4,585,016	$
40040	Other Revenue	$293,508	$217,844	$532,385	$475,389	$816,887	$728,367	$1,044,934	$1,005,543	$1,261,713	$1,237,535	$1,585,586	$1,535,488	$1,883,086	$1,825,060	$2,230,246	$2,053,962	$2,430,500	$2,304,739	$

Account	Description	January	February	March	April	May	June	July	August	September	Total
40010	Product Revenue	$4,636,182	$3,976,416	$5,012,118	$3,894,088	$3,791,683	$6,035,733	$5,592,895	$5,647,961	$3,956,225	**$3,956,225**
40020	Services Revenue	$2,455,781	$2,139,010	$2,469,276	$1,954,858	$2,098,992	$2,960,641	$2,623,468	$2,994,804	$2,986,372	**$2,986,372**
40030	Maintenance Revenue	$455,177	$403,555	$499,892	$379,186	$347,373	$570,986	$491,064	$573,963	$324,666	**$324,666**
40040	Other Revenue	$293,508	$238,877	$284,502	$228,047	$216,779	$323,874	$297,500	$347,160	$200,254	**$200,254**

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LIVE WALKTHROUGH

Demo

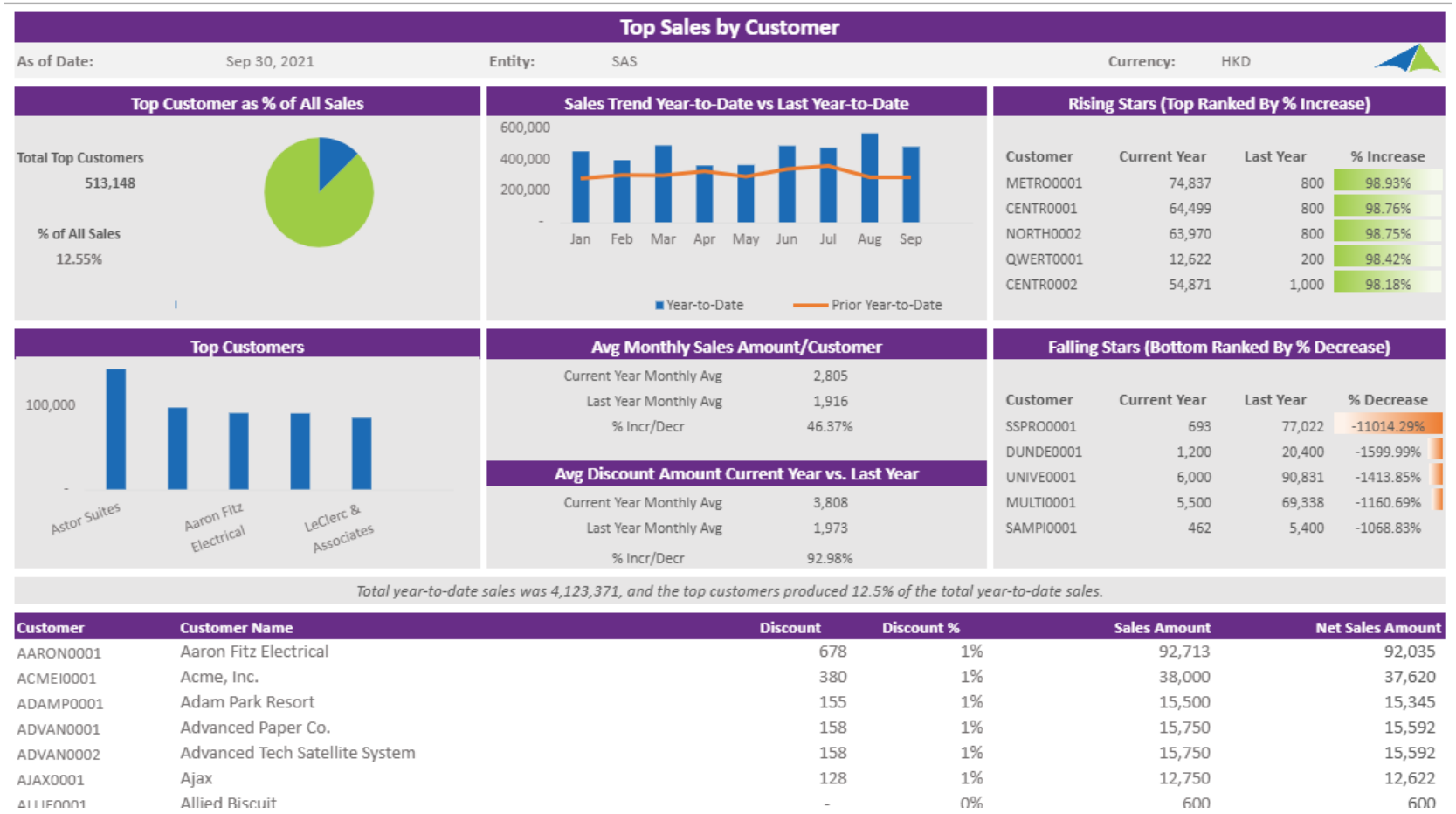


Reporting and Planning



Beyond the Ledger: Reporting and Planning

Reporting Example



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Beyond the Ledger: Reporting and Planning

Reporting Example

Win Loss Ratio - 18 Month Rolling Trend

Sales Person	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22
Gavin Hunt														1				
Gina Houston	24	22	14	16	22	12	39	40	54	43	33	34	31	24	26	40	27	25
Jeff Moyer					1		4		1		1	2			2	3	3	4
Kirin Cool			1				1	2				1	1					21
Liam Lee	1	1						1	1	1	1		1	1	1			
Marshawn Powers	2		2	4	1		2	5	3	7	6	6	3	9		2	3	2
Mary Artist											1							
Michelle Art												1						
Nacho Pavarotti	2		1	2	1	3	3	2	2	2	1	3	3	2		1		3
Sally Curtlin	25	14	10	16	13	13	38	34	40	37	37	44	27	25	36	42	41	32
Tam Suthitham										1						1		2
Tina Richmond	44	27	23	19	30	22	44	48	78	55	60	76	64	34	32	40	46	28
Tony Marconi	24	11	16	10	17	10	29	33	52	42	32	51	31	41	22	30	35	22
Total by Sales Person	**122**	**75**	**67**	**67**	**85**	**60**	**160**	**165**	**231**	**188**	**172**	**218**	**161**	**137**	**119**	**159**	**155**	**139**
Average Opport. /Person	9	6	5	5	7	5	12	13	18	14	13	17	12	11	9	12	12	11

Team Total Benchmark	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	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 Opportunities	122	75	67	67	85	60	160	165	231	188	172	218	161	137	119	159	155	139
Total Won Opportunities	29	26	22	22	33	21	61	59	90	63	67	70	62	53	44	61	70	64
Avg Monthly Win Ratio	24%	35%	33%	33%	39%	35%	38%	36%	39%	34%	39%	32%	39%	39%	37%	38%	45%	46%



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Beyond the Ledger: Reporting and Planning

Planning Example

Personnel Budget

Corporate US

Administration

Budget

EMPLOYEE NAME	POSITION	HIRE DATE	HIRE MONTH	END MONTH	ANNUAL HOURS	HOURLY RATE	ANNUAL SALARY	INCREASE MONTH	% INCREASE	$ INCREASE	END RATE	END SALRY	BENEFITS (Y/N)	Salary Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22
FULL TIME EMPLOYEES																					
Freddie Mauer	CEO	1/1/2001			2,080	40.87	85,000	Dec	10%		44.95	93,500		7,219	6,521	7,219	6,986	7,219	6,986	7,219	7,21
Emily Martinez	CFO	4/12/2004			2,080	39.90	83,000				39.90	83,000		7,049	6,367	7,049	6,822	7,049	6,822	7,049	7,04
Dustin McCann	COO	7/15/2008	Feb		2,080	38.46	80,000				38.46	80,000		0	6,137	6,795	6,575	6,795	6,575	6,795	6,79
Justin Posada	Administrative Assistant	5/3/2008			2,080	26.25	54,600				26.25	54,600		4,637	4,188	4,637	4,488	4,637	4,488	4,637	4,63
Joanne Suzuki	Administrative Assistant	12/10/1997			2,080	21.88	45,515				21.88	45,515		3,866	3,492	3,866	3,741	3,866	3,741	3,866	3,86
Chris Molina	Administrative Assistant	7/7/2007			2,080	24.58	51,135				24.58	51,135		4,343	3,923	4,343	4,203	4,343	4,203	4,343	4,34
Christine Montero	Office Manager	6/6/2006			2,080	26.47	55,066				26.47	55,066		4,677	4,224	4,677	4,526	4,677	4,526	4,677	4,67
Luis Pierzynski	Vice President	5/5/2005			2,080	37.98	79,000				37.98	79,000		6,710	6,060	6,710	6,493	6,710	6,493	6,710	6,71
Tracy Molina	Vice President	4/4/2004			2,080	37.98	79,000				37.98	79,000		6,710	6,060	6,710	6,493	6,710	6,493	6,710	6,71
To Be Hired #1	Dir of Professional Services		Dec		2,080	36.06	75,000				36.06	75,000		0	0	0	0	0	0	0	
To Be Hired #2	Another Person		Jun		2,080	24.04	50,000				24.04	50,000		0	0	0	0	0	4,110	4,247	4,24
To Be Hired #3	New hire		May		2,080	21.63	45,000	Feb	5%		22.72	47,250		0	0	0	0	4,013	3,884	4,013	4,01
											0.00	0		0	0	0	0	0	0	0	
											0.00	0		0	0	0	0	0	0	0	
											0.00	0		0	0	0	0	0	0	0	
											0.00	0		0	0	0	0	0	0	0	
											0.00	0		0	0	0	0	0	0	0	
												Total Full Time		45,210	46,972	52,005	50,327	56,018	58,320	60,265	60,26
HOURLY EMPLOYEES																					
Chris Martin	Receptionist	4/12/2004			2,080	15.00	31,200.00				15.00	31,200		2,650	2,393	2,650	2,564	2,650	2,564	2,650	2,65
Sophia Baker	Office Manager	7/15/2008			2,080	17.00	35,360.00	May	4%		17.68	36,774		3,003	2,713	3,003	2,906	3,123	3,023	3,123	3,12
Clint Doumit	Receptionist	5/3/2008			2,080	18.00	37,440.00				18.00	37,440		3,180	2,872	3,180	3,077	3,180	3,077	3,180	3,18
Orlando Iannetta	Contractor	12/10/1997			2,080	20.00	41,600.00				20.00	41,600		3,533	3,191	3,533	3,419	3,533	3,419	3,533	3,53
							0.00				0.00	0		0	0	0	0	0	0	0	
							0.00				0.00	0		0	0	0	0	0	0	0	
							0.00				0.00	0		0	0	0	0	0	0	0	
							0.00				0.00	0		0	0	0	0	0	0	0	
							0.00				0.00	0		0	0	0	0	0	0	0	
												Total Part Time		12,366	11,169	12,366	11,967	12,486	12,083	12,486	12,48

GL BUDGET SUMMARY									
60010	Full Time - Salary	45,210	46,972	52,005	50,327	56,018	58,320	60,265	60,26
60020	Full Time - Commission	0	0	0	0	0	0	0	
60030	Full Time - Bonus	0	0	0	0	0	0	0	
61010	Part Time - Salary	12,366	11,169	12,366	11,967	12,486	12,083	12,486	12,48
61040	Part Time - Overtime	0	0	0	0	0	0	0	
61050	Part Time - Bonus	0	0	0	0	0	0	0	
61500	Payroll Taxes - FICA	4,865	4,913	5,439	5,264	5,789	5,949	6,147	6,14
61510	Payroll Taxes - FUTA	3,438	1,702	320	0	241	426	173	
61520	Payroll Taxes - SUTA	516	255	48	0	36	64	26	
61530	Payroll Taxes - Worker's Compensa	2,879	2,907	3,219	3,115	3,425	3,520	3,638	3,63
61540	Benefits	0	0	0	0	0	0	0	
90010	FTEs	12.0	13.0	13.0	13.0	14.0	15.0	15.0	15.
Total Salary and Benefits - Budget		**69,275**	**67,919**	**73,396**	**70,673**	**77,995**	**80,363**	**82,735**	**82,53**

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LIVE WALKTHROUGH

Demo



Q&A



Business Technology Services

Questions?

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