

The image features the FORVIS logo in a bold, red, sans-serif font on the left side. To the right of the logo is a large, abstract graphic consisting of several overlapping, diagonal stripes in various shades of red, creating a sense of depth and movement. The stripes are arranged in a way that they appear to be receding into the distance.

FORVIS™

Business Technology Solutions

Get Your Planning in the Flow With Solver

May 18, 2023

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- Tax
- Advisory

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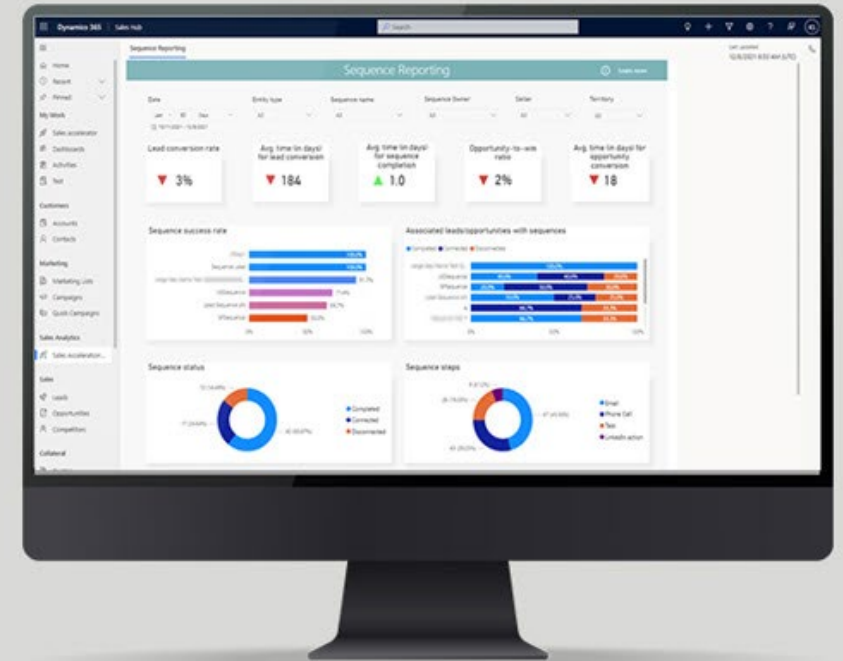


Business Technology Solutions

FORVIS' Business Technology Solutions can help support digital transformation across your organization with enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

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From sales forecasting to financial reporting, learn what CRM and ERP technologies can do.

Meet the Presenter



Charles Allen

Senior Managing Consultant

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Objectives

- Discuss the purpose of workflow in planning
- Discuss the purpose of input flow in planning
- Explain how process manager can be used with planning

Agenda

9:00 am ● Planning Templates

9:15 am ● Workflow

9:30 am ● Input Flow

9:40 am ● Process Manager



Planning Templates

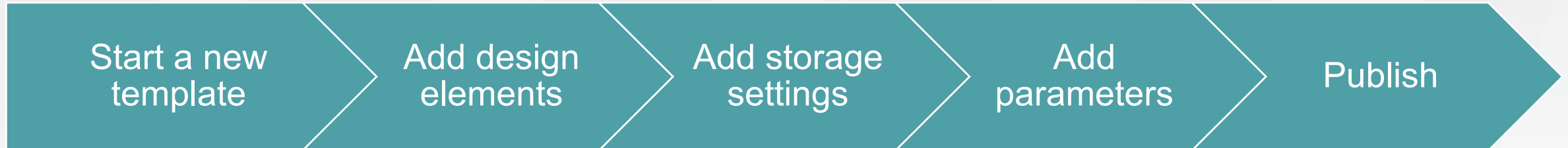
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Planning Templates

- Designed using Excel
- Web-based data entry
- Parameter-driven
- Works with multiple types of data
- Comments & line items

Steps to Creating a Planning Template



Using a Planning Template





Show Me!





Workflow

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What Is Workflow?

- Provides visibility to progress made
- Controls budget template usage
- Can contain multiple templates
- Reviewers & approvers

Workflow Setup


Properties ^

NAME

5. Annual Budget - Department

FROM (OPTIONAL)

From




TIME

12:00 AM

▼

TO (OPTIONAL)

To



TIME

11:30 PM

▼

TIMEZONE

(UTC -06:00) Central Time - Chicago

▼

INTEGRATION

Data Warehouse

▼

REVIEWER (OPTIONAL)

☐ Allow Save Data

APPROVER (OPTIONAL)

☐ Allow Save Data

Workflow Setup

DEFAULT PARAMETERS ^

CHOOSE ENTITY

'SUS'

☐ Let the user decide

SELECT SALESREP.

1210

☐ Let the user decide

CHOOSE DEPARTMENT

'100'

☐ Let the user decide

CHOOSE BUDGET VERSION

'BUD'

☐ Let the user decide

SELECT CUSTOMERS

*

☐ Let the user decide

CHOOSE ESTIMATE VERSION

'BUD'

☐ Let the user decide

SELECT PRODUCTS

*

☐ Let the user decide

CHOOSE LAST ACTUAL PERIOD

202109

☐ Let the user decide

CHOOSE DEPARTMENT(S)

100

☐ Let the user decide

CHOOSE ENTITY

'SUS'

☐ Let the user decide

CHOOSE FORECAST VERSION

'FCST'

☐ Let the user decide

USER ASSIGNMENTS

	B202 - Budget Ac...	B204 - Personnel	B206 - Travel	B208 - Capital	B210 - Other Exp...	B212 - Sales Budg...
▼ Charles Allen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Workflow Status

Status

☐ Not started

☐ In progress

☐ Completed

Template

☐ B202 - Budget Accuracy Analysis

☐ B204 - Personnel

☐ B206 - Travel

☐ B208 - Capital

☐ B210 - Other Expenses

☐ B212 - Sales Budget - Price & Quantity

User

☐ Charles Allen

Search

5. Annual Budget - Department

0 %
PROGRESS

0/6
COMPLETE

NOT
STARTED 2

IN
PROGRESS 4

COMPLETED 0

B208 - Capital

Entity: 'SUS'
Scenario: 'BUD'
Estimate: 'BUD'
Period: 202109
Company: Data Warehouse

Charles Allen

B212 - Sales Budget - Price & Quantity

Entity: 'SUS'
Employee: 1210
Period: 202109
Customer: *
Product: *
Company: Data Warehouse

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B202 - Budget Accuracy Analysis

Entity: 'SUS'
Period: 202109
Scenario: 'BUD'
Company: Data Warehouse

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B204 - Personnel

Entity: 'SUS'
Department: 100
Scenario: 'BUD'
Forecast: 'FCST'
Period: 202109
Company: Data Warehouse

Charles Allen

Workflow Template Usage

Export

Complete assignment

Report parameters

CHOOSE SCENARIO

BUD15

CHOOSE FIRST PERIOD O...

202101

RUN

SAVE DATA

Last run: 5 years ago

Corporate Strategy

Corporate Assumptions

For Scenario BUD15

For Year 2021

Enter Goals - See Following Tab

Company's Purpose

We will inspire our employees to be the best they can be. We will engage in sustainable practices and anticipate the needs of our customers.

We will maximize return to the stockholders while still maintaining quality in our products.

Core Values and Beliefs

Build Relationships that Last

Strategy

Goals

Directions

Spreading and Line item details

ALL

STATUS

COMMENT

Search

Jul 19, 2018

Charles Allen

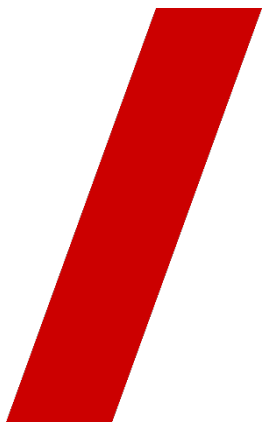
9:38 AM

Started the assignment

ADD

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Input Flow

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Input Flow

- Used to automate data flow
- Chain reaction between templates
- Example: Assumptions template changes will update data in a Personnel form

Input Flow

Payroll

GENERAL ^

NAME

Payroll

INTEGRATION

Data Warehouse

COMPANY

Data Warehouse

TEMPLATES ^

Search or select templates



BROWSE TEMPLATES



Only start new flow execution if data is stored in the first template

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Input Flow

PARAMETERS ^

CHOOSE ENTITY

'SUS' 🔍

CHOOSE DEPARTMENT(S)

100 🔍

CHOOSE SCENARIO

'BUD' 🔍

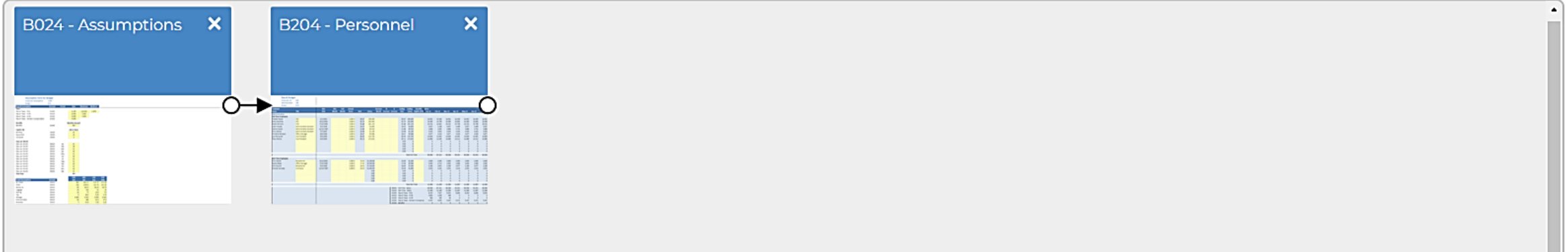
CHOOSE FORECAST VERSION

'FCST' 🔍

CHOOSE LAST ACTUAL PERIOD

202201 🔍

☐ Allow this flow to run in parallel when parameters differ.



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Process Manager

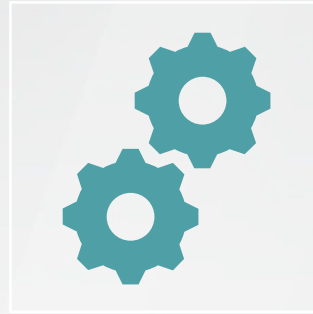
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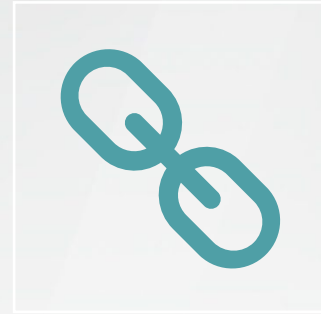
Process Manager



Provides a list of steps to complete a process



Multiple processes can be defined








Can include assignments & links

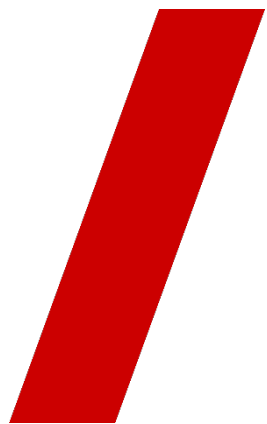
Process Manager

Process Name: Sample Department Process

0 / 5 Completed

Last Change May 3, 2023, 5:39:00 PM

Description		Link	Assignee ▾	Due Date	
<input type="radio"/>	1 Enter assumptions	Assumptions		Sep 8, 2020	⋮
<input type="radio"/>	2 Payroll	Personnel		📅 Add Date	⋮
<input type="radio"/>	3 Capital	Capital		📅 Add Date	⋮
<input type="radio"/>	4 Other Expenses	Other Expenses		📅 Add Date	⋮
<input type="radio"/>	5 Sales	<input type="text" value="Sales"/>		📅 Add Date	⋮
+ Add Item					



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Additional Resources

- Solver Global website (www.solverglobal.com)
- Solver Academy (academy.solvertraining.com)
- Upcoming FORVIS webinars
 - June 1: [All Aboard! Strategies for Driving CRM User Adoption](#)
 - June 13: [Power BI & Business Central: A Winning Combination](#)

Q&A



Use the Q&A tool to submit any questions you may have.

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