

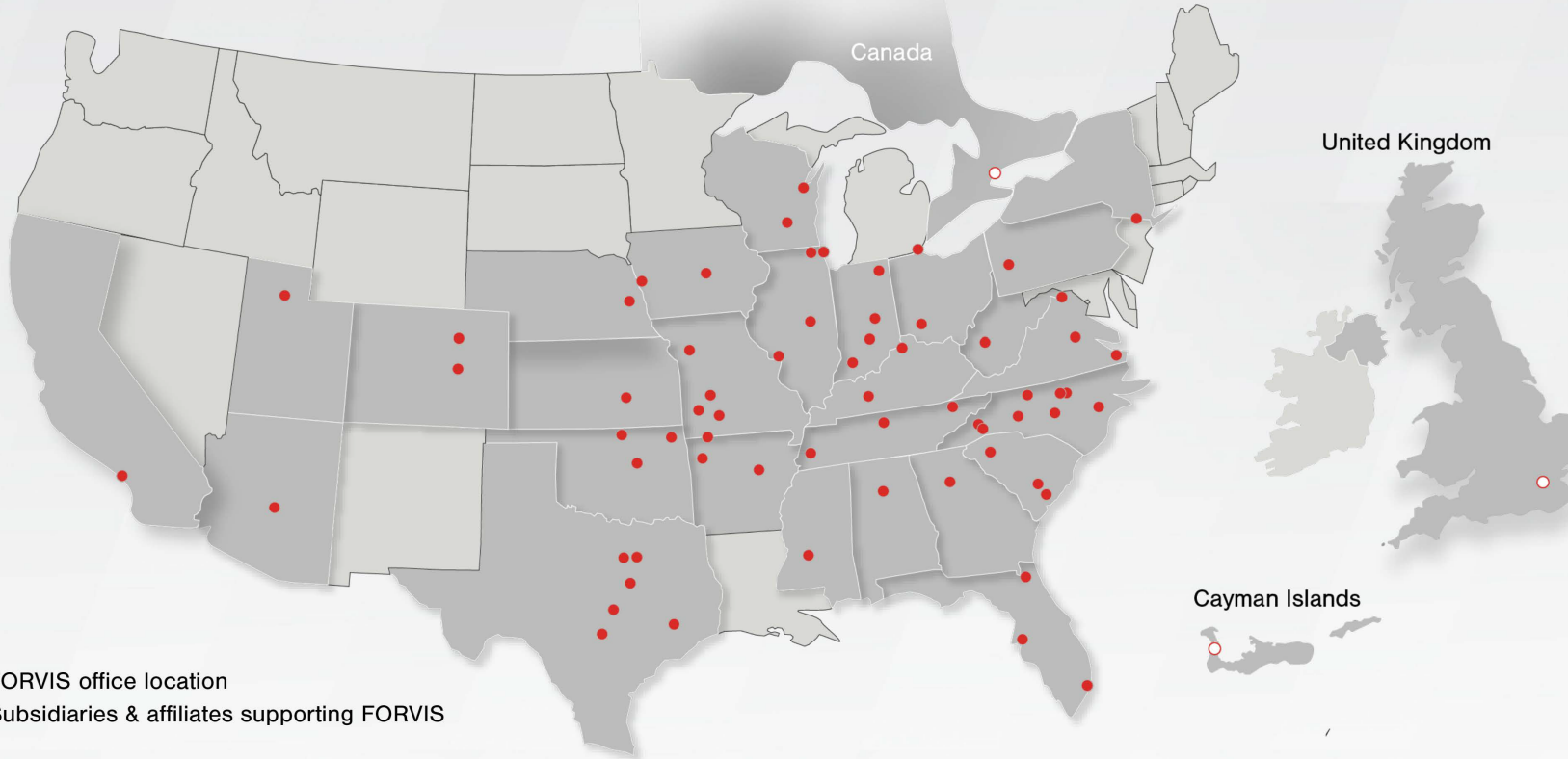
# FORVIS<sup>®</sup>

Business Technology Solutions

## **Solver CPM: A Year in Review**

December 14, 2023

# Global Presence & Reach



- FORVIS office location
- Subsidiaries & affiliates supporting FORVIS

## Subsidiaries & Affiliates Supporting FORVIS

- FORVIS Capital Advisors, LLC
- FORVIS Global Advisory Canada ULC\*\*
- TALENT SHIFT, LLC
- FORVIS Wealth Advisors, LLC
- FORVIS Global Advisory Ltd. UK\*\*

**FORVIS**

## By the Numbers

**Top 10**  
U.S. Public Accounting Firm \*

**27**  
States + Canada, U.K., & \*\*  
Cayman Islands

**10+**  
Industries

**68**  
Markets

**500+**  
Partners & Principals

**6,000+**  
Team Members



FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.

# Business Technology Solutions

**FORVIS** Business Technology Solutions provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

In addition, our Insights & Automation services include business intelligence (BI) and robotic process automation (RPA) assessments, implementations, and training.



We are an award-winning partner of Solver Global, which itself is highly rated by G2, a leading software marketplace.

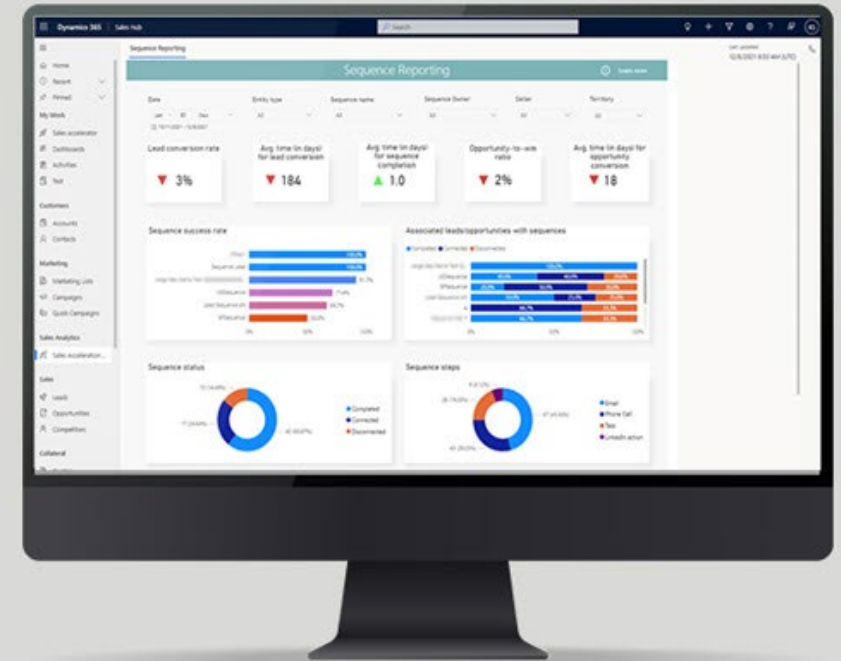
## FORVIS

Microsoft  
Partner

Sage Partner

ORACLE  
NETSUITE  
Solution Provider

salesforce  
PARTNER



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

# Presenter



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Senior Managing Consultant

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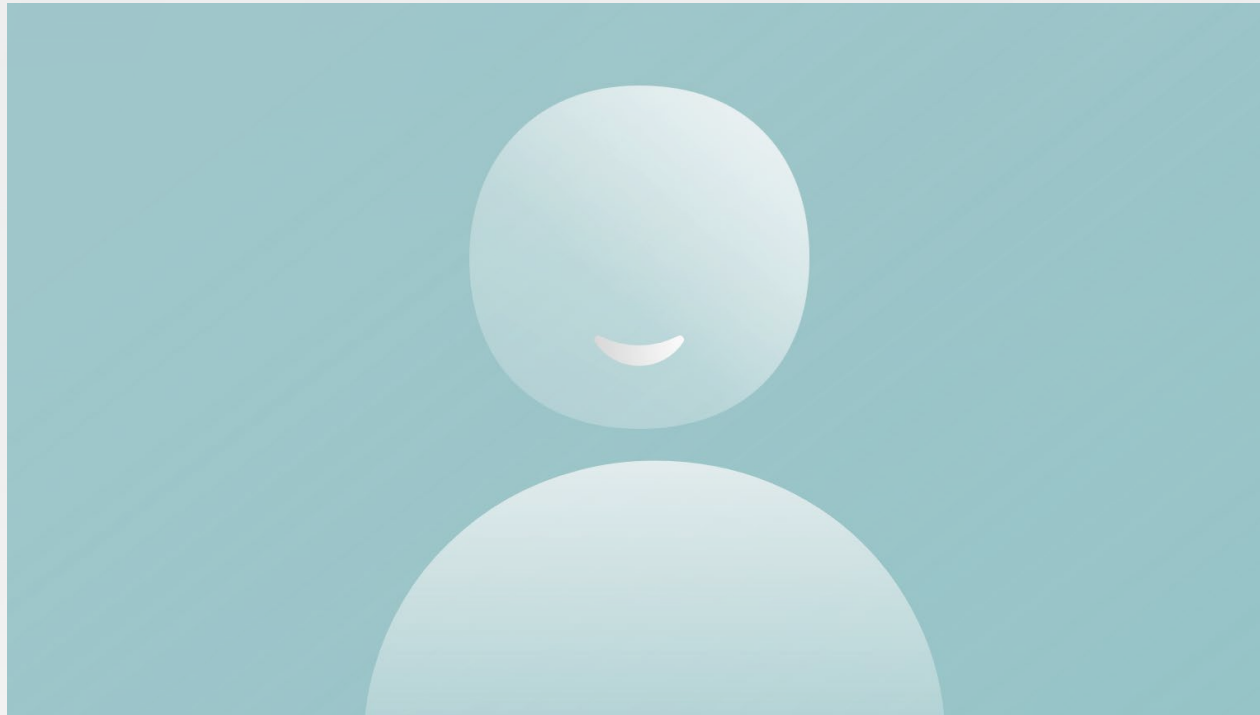
Business Technology Solutions

## **Solver CPM: A Year in Review**

December 14, 2023

# Objectives

- Discuss new features released for Solver in 2023
- Identify bug fixes released for Solver in 2023
- Describe new features planned for Solver in 2024



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# Who's That Guy?

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# Agenda

9:00 AM CT ● Features & Bug Fixes in 2023

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9:40 AM ● Features Planned for 2024

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# Features & Bug Fixes in 2023

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# New Features & Bug Fixes

- Solver is updated monthly
- Release notes <https://help.app.solverglobal.com/article-categories/release-notes/>

# Reporting

- New version of Report Designer
- Improved & more detailed error messages
- Performance improvement for loading thumbnails & previous executions
- Support for Merge & Center
- Support for Excel data validation feature in the web

# Planning

- Cancel option when loading templates
- Use F2 to open the line-item detail window
- Lock budgets & other scenarios

# Ad Hoc Reporting

- Advanced Filtering
- Filter on attributes & measures
- Change ownership of a report

# Data Warehouse

- Delta data loading
- Drill back URL
- Updated BC connector
- Updated QuickStart interface
- Currency updates
- Improved error messages

# Publisher

- Send reports as PDF
- Add custom message to Publisher jobs
- Add parameters to file names

# Process Manager

- Advance due dates for duplicated processes
- Filter process details by assignee



# Administration

- Export user reports
- Removed the ability to remove the one & only Administrator

# New Features for 2024

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# New Features for 2024

Integration  
With Azure  
Open AI (chat)

Multilevel  
Reviewers &  
Approvers

Custom  
Homepage

Custom  
Connectors

KPIs & Alerts

Charting

Discussion &  
Chat

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# What's Next

## Share & Collaborate on Financial Reports With Solver

**FORV/S**



**WEBINAR**

Share & Collaborate on  
Financial Reports with Solver

Tuesday, Jan. 16 • 10–11 a.m. ET

[REGISTER NOW](#)

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# Questions?

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# Thank you!

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