



Cloud-based Reporting & Budgeting for Dynamics GP and Sage Intacct

with **BI360**



Meet Your Presenters

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Agenda

- 1 Solver; A Long Time Partner of The Resource Group
- 2 Manual vs. Automated Processes
- 3 BI360 Overview and BI360 Architecture
- 4 BI360 Product Presentation
- 5 Questions & Answers



Questions For Our Audience

- Are you interested in better reporting?
- How many of you DO NOT use Excel?
- How many report writers are you using today?
- What are you using today for your budgeting / forecasting process?
- If a manual process in Excel; would you like to automate that process?
- If other CPM tool; are they happy with the tool in place?

What do you get out of this?

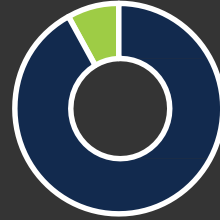
- Business user friendly system that will integrate with multiple data sources
- Empowering design experience with Excel
- Automated budgeting and forecasting process with one total solution with reporting
- Centralized reporting tools that is managed by the office of Finance– Little IT involvement
- Reporting beyond the GL
- One version of the truth

Longtime Solver Partner

140+
EMPLOYEES

2,600+
CUSTOMERS

- ✓ In-house Development
- ✓ Global Support
- ✓ BI360 Partner Program
- ✓ Solver Academy eLearning
- ✓ User Conferences



95%
Customer Retention



22%
Avg Growth YOY

Global Locations

Solver HQ (USA)
Solver Canada
Solver Africa
Solver APAC
Solver India
Solver Benelux
Solver Italy
Solver Sweden
Solver UK
Solver Central America
Solver Colombia
Solver Mexico

Distributors

France
Ireland
Spain & Portugal
Switzerland



2018

2017

2016

2015

A Changing World...

- **MORE DATA:** Data everywhere
- **FASTER PACE:** Increasing pace of business
- **CHANGING ROLES:** Managers going from Data Historians, to Real Time Analysts and Futurists

The goal of this presentation is to show you how BI360 can help you enable world-class decisions

I don't want *financial planning* people spending their time importing and exporting and manipulating data. I want them to focus on what is the data telling us."

Mark Garrett,
CFO, Adobe



Historian



Analyst



Futurist

Budgeting Challenges

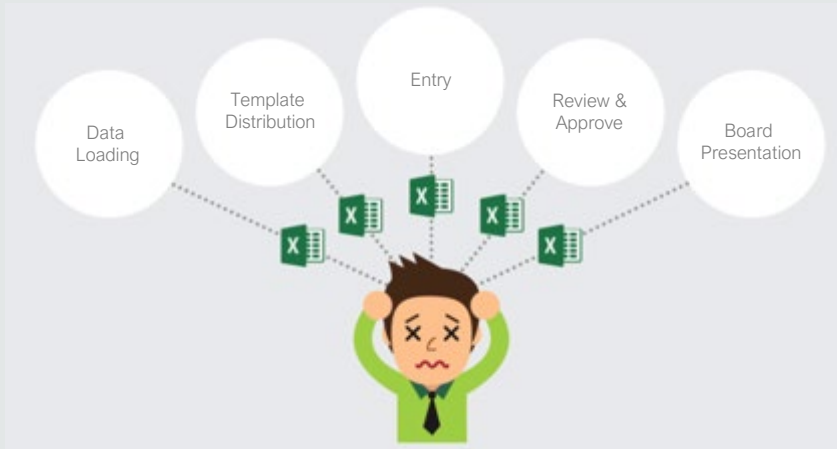
BI360 TO THE RESCUE

Spreadsheet Budgeting

- ✗ Manual data loading
- ✗ Manual spreadsheets
- ✗ Manual template distribution
- ✗ Manual workflow
- ✗ Manual comments & line items
- ✗ Manual forecasting & modeling

BI360 Budgeting

- ✓ Data integration
- ✓ Parameter-driven models
- ✓ Web-based data entry
- ✓ Budget workflow
- ✓ Built-in comments & line items
- ✓ Dynamic forecasting & modeling



The Spreadsheet Juggler



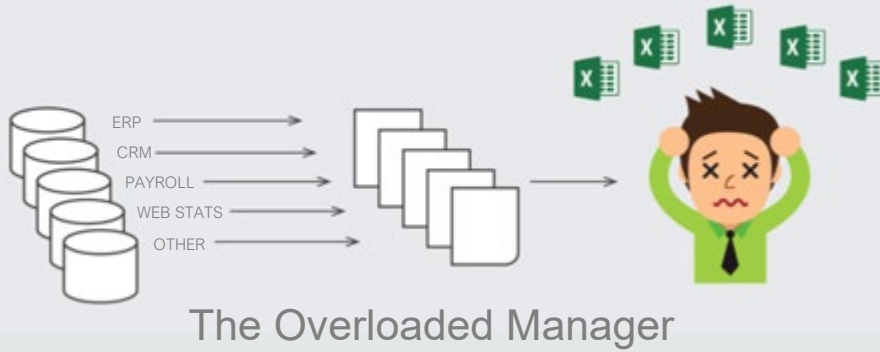
The Decision Optimizer

Reporting Challenges

BI360 TO THE RESCUE

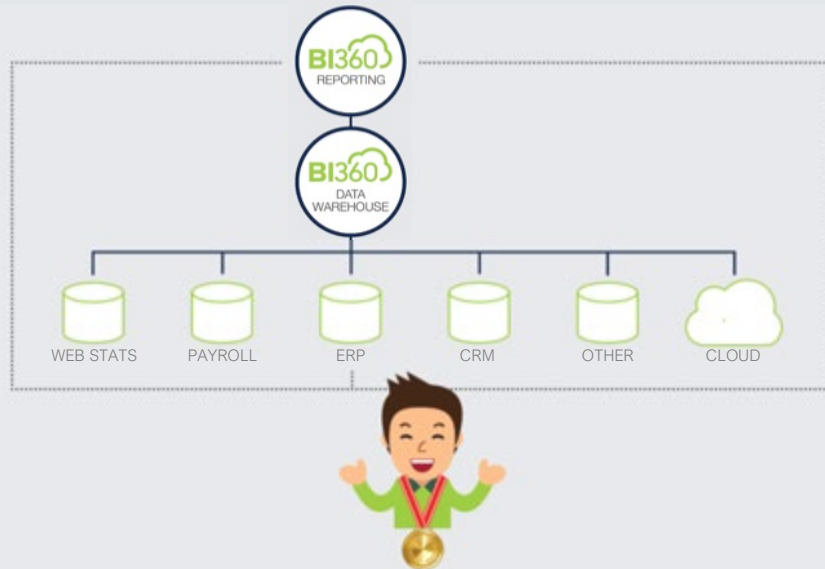
Typical Reporting Situation

- ✗ **MANY** data sources
- ✗ **MANY** reporting tools
- ✗ **MANY** Excel models



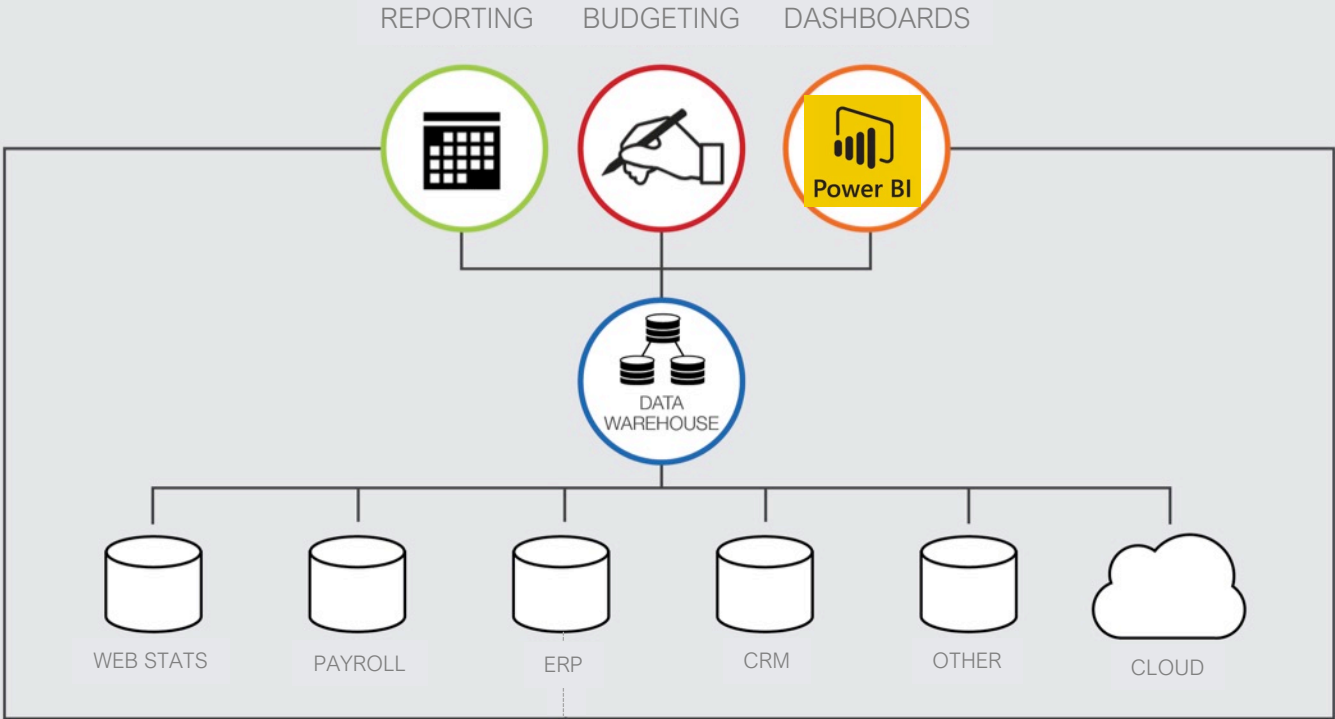
BI360 Reporting

- ✓ **ONE** database (DW)
- ✓ **ONE** reporting tool
- ✓ **ONE** user interface (portal)



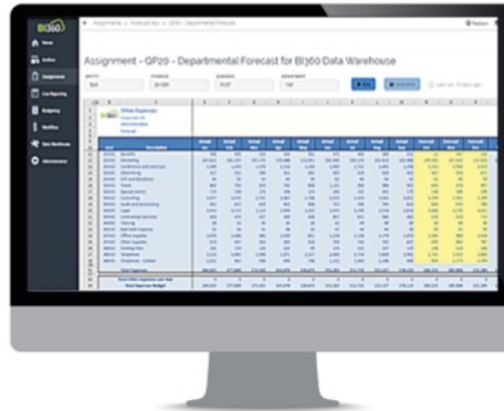
BI360 Architecture

ENDLESS POSSIBILITIES



On-premise version also available

And now, a **BI360** demonstration...



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- ✓ Supports staff turnover – Solver will replace students at no cost
- ✓ Visit the [Solver Academy](#)
- ✓ Free sample video - [Excel Add-in Overview](#)

THANK
YOU!



- **QUESTIONS?**
- **SOLVER ACADEMY**
A new eLearning experience...always there when you need it
- **NEXT STEPS**
Contact The Resource Group for more information:
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www.solverglobal.com

Summary & Action Items

Solver's goal with BI360 is to enable world-class decisions (top 1% in your industry) for your organization



Historian



Analyst



Futurist

