



Empowering Nonprofits: Streamlining Reporting & Planning

November 14, 2024

U.S. Presence

Top 10 **\$2bn+**

U.S. Public Accounting Firm*

Revenue (2023)

76

Markets

29

States

600+

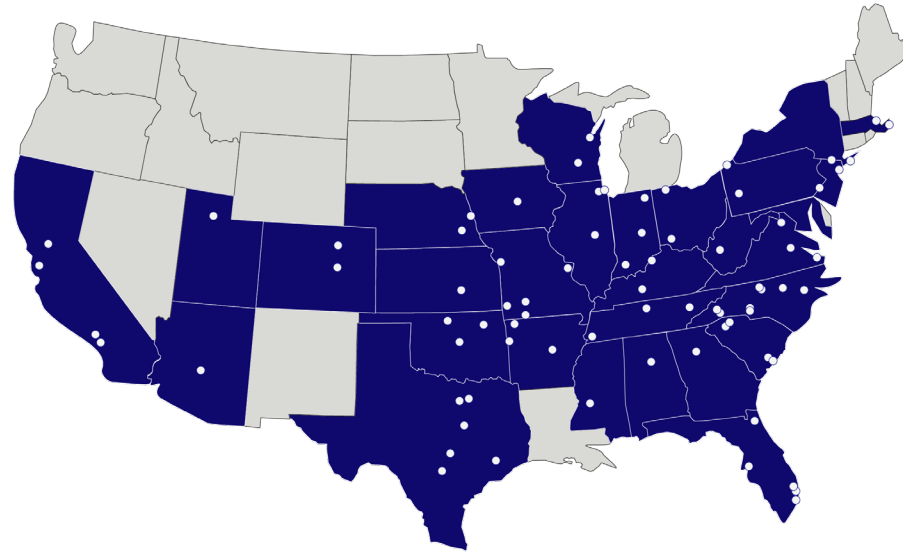
Partners & Principals

7,000+

Employees

*Source: Inside Public Accounting, based on most recent rankings

2023 combined revenues: FORVIS \$1.7bn, Mazars USA (expected) \$305m



As of August 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
Jacksonville
Miami
Tampa Bay
West Palm Beach

Georgia
Atlanta

Illinois
Chicago Downtown
Chicago Oakbrook Terrace
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston Brewster
Boston State Street

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

North Carolina (cont)
Greenville
Hendersonville
Raleigh
Winston-Salem

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Erie
Fort Washington
Pittsburgh

South Carolina
Charleston
Greenville
Spartanburg
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond
Tysons, VA

West Virginia
Charleston

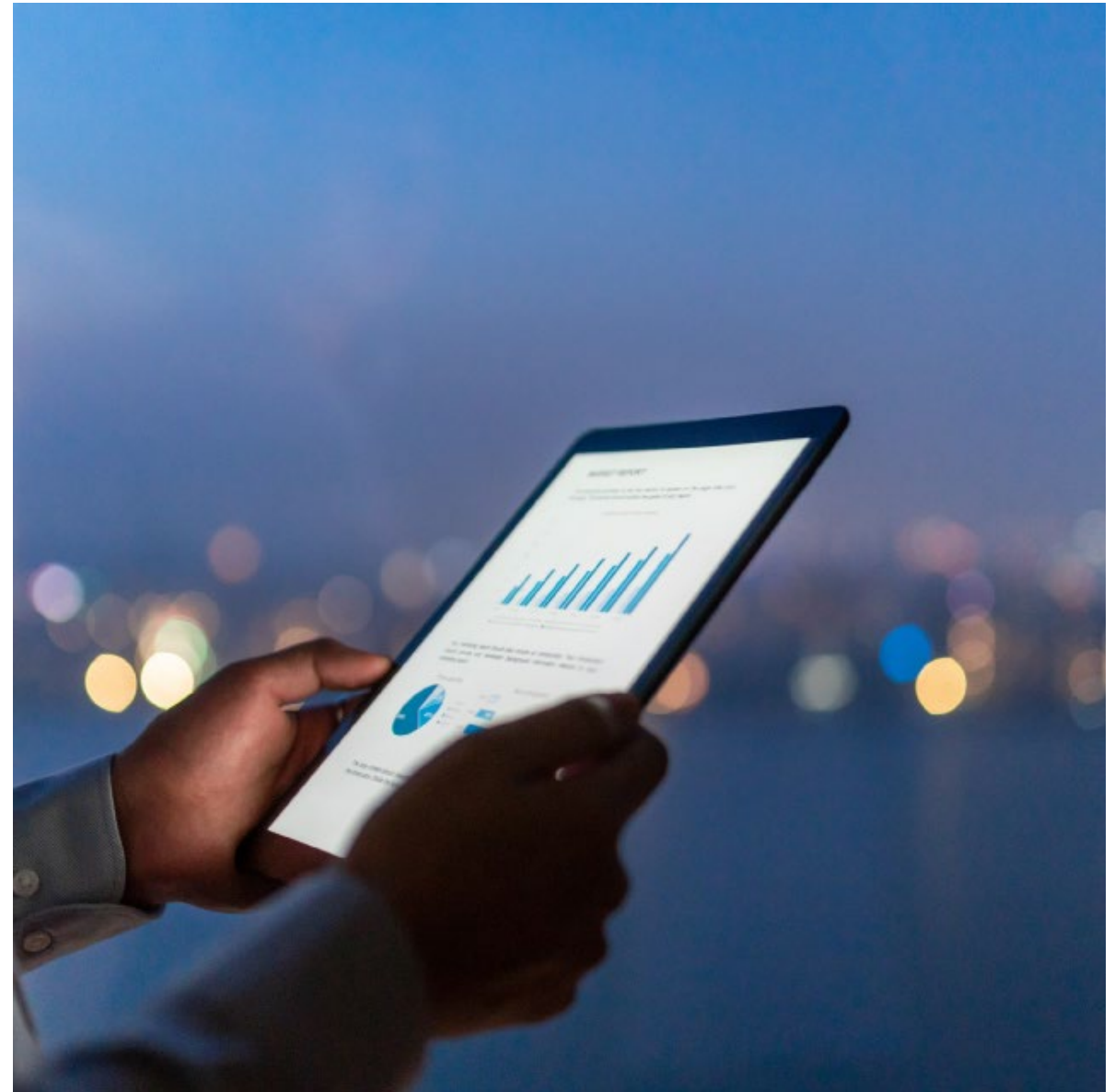
Wisconsin
Appleton, WI
Madison, WI

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



Business Technology Services

ERP

Microsoft Dynamics 365	
Finance	Supply Chain
Commerce	Project Operations
Business Central	Dynamics GP
NetSuite	
Sage & Sage Intacct	
Trimble Viewpoint Spectrum & Vista	

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

Sage Partner

salesforce PARTNER

solver

forvis
mazars

Today's Presenters

Business Technology Services Practice

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

– Chad Back, Partner



Richard Cole

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Charles Allen

Senior Manager

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Objectives

1. Describe how Solver can help streamline financial reporting
2. Explain how Solver's budgeting features can help nonprofits balance overhead costs & allocate resources efficiently
3. Outline the interactive examples of dashboards designed to help nonprofits



Agenda

1. Key Challenges Facing Nonprofit Organizations
2. Reporting
3. Planning
4. Dashboards



01

Key Challenges Facing Nonprofit Organizations



Common Reporting & Planning Challenges

- Nonprofits require good financial data to help plan, budget, & monitor finances
- Budget to actual comparisons, including current month, YTD, etc. – at department, program, or entity level with various levels of detail
- Monthly reporting packages with financial statements & specific details of key revenue & expense categories to help managers make operating decisions – KPIs
- Board packages, often at a higher level than what is reviewed by management, include various summary data & KPIs



02

Reporting



Reporting What Is Solver?



Cloud-based reporting & planning



Data warehouse



Connectors for multiple systems



Excel-based template design

Reporting Types of Data

Accounting Systems

- Blackbaud Financial Edge
- Sage Intacct
- Microsoft Dynamics ERP

Other Data

- Raiser's Edge
- iMIS
- CRM
- Payroll
- Fixed Assets

Reporting Process

Data

- Select fields from the data warehouse
- Apply filters
- Add grouping & sorting

Excel

- Add formatting
- Add formulas

Publish

- Publish the report
- Put the template in a shared category
- Share the results using Publisher

Reporting Report Design Experience

The screenshot displays the Report Designer v5.3.10314 interface. On the left is a navigation pane with a tree view of the General Ledger hierarchy. The main workspace shows a report titled "Profit and Loss Detail Report" with a table of financial data. A "Layout Editor" window is open over the report, showing a filter configuration for "Account" with a rollup level of 1 and a filter value of "R1. Revenue".

Account Descriptions	Period Start	Scenario Descrip	Total
Revenue			
[Account] [Account Description]		#VALUE!	0
Total Revenue		0	0
Cost of Sales			
[Account] [Account Description]		#VALUE!	0
Cost of Sales		0	0
Gross Profit		0	0
Gross Profit Margin		0.0%	0.0%
Departmental Expenses			
[Department Description]			
up Level 1]		0	0
Total [Department Description]		0	0
Total Expenses		0	0
EBITDA		0	0
EBITDA Margin		0.0%	0.0%
Other Expenses			
[Account] [Account Description]		#VALUE!	0
Total Other Expenses		0	0
Net Income		0	0
Net Income Margin		0.0%	0.0%



Reporting

The Finished Report



Report Templates > R112 - P&L - by Department by Month

[Edit in Report Designer](#)
[Export](#)
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[Add to Archive](#)

Report parameters

Choose Entity

'SUS'

Choose Scenario

'ACT'

Choose Period

202109

Run

Last run: 5 minutes ago

Account Descriptions	Jan-21 Actual	Feb-21 Actual	Mar-21 Actual	Apr-21 Actual	May-21 Actual	Jun-21 Actual	Jul-21 Actual	Aug-21 Actual	Sep-21 Actual	Total
Revenue										
40010 Product Revenue	843,763	787,830	782,411	796,713	685,961	1,056,434	986,226	892,347	730,880	7,562,564
40020 Services Revenue	450,808	382,793	417,447	367,154	380,392	506,989	490,540	559,682	540,925	4,096,731
40030 Maintenance Revenue	75,856	84,414	79,133	76,916	70,032	102,926	98,778	98,099	59,664	745,818
40040 Other Revenue	42,274	35,501	38,304	35,894	32,725	44,601	52,294	50,521	31,677	363,792
Total Revenue	1,412,700	1,290,538	1,317,295	1,276,677	1,169,111	1,710,950	1,627,837	1,600,649	1,363,145	12,768,904
Cost of Sales										
50010 COGS - Product Sales	281,476	245,562	270,768	258,414	235,415	342,409	328,226	346,062	254,515	2,562,847
Cost of Sales	281,476	245,562	270,768	258,414	235,415	342,409	328,226	346,062	254,515	2,562,847
Gross Profit	1,131,224	1,044,976	1,046,527	1,018,263	933,696	1,368,542	1,299,612	1,254,588	1,108,630	10,206,057
Gross Profit Margin	80.1%	81.0%	79.4%	79.8%	79.9%	80.0%	79.8%	78.4%	81.3%	79.9%
Departmental Expenses										
<i>Administration</i>										
Salaries and Benefits	140,334	130,452	137,674	116,210	113,588	160,148	153,858	156,931	124,724	1,233,920
Sales and Marketing	169,482	162,936	159,389	151,361	125,137	196,820	196,434	195,153	163,827	1,520,538
Travel and Entertainment	977	908	995	908	781	1,313	1,176	1,189	1,108	9,353
Professional Fees	7,216	7,738	8,015	6,803	5,912	9,852	8,696	9,228	6,949	70,409
Bad Debt	33	38	41	36	30	47	44	44	36	350
Business Insurance	1,342	1,514	1,461	1,244	1,317	1,683	1,841	1,666	1,581	13,647
Office Supplies	1,589	1,635	1,533	1,603	1,337	1,937	1,980	1,881	1,711	15,207
Telephone and Internet	4,328	4,144	4,104	3,822	3,123	4,841	4,918	5,142	4,065	38,486
Rent and Utilities	3,622	3,190	3,637	3,230	3,013	4,025	4,235	4,551	3,563	33,065
Admin Expenses	4,304	4,006	4,099	3,897	3,284	5,131	5,036	5,167	3,867	38,793

Reporting Statement of Activities

Live Reporting > NP1 - Statement of Activities

Notifications Feedback Help Nils Rasmussen 11.NFP.DEMO

Data Warehouse

Report parameters

Auto-refresh: Off

Statement of Activities - Variance Report

Solver Association - US

Account Descriptions	Current Month	Prior Year	March, 2021		'Bud'	Var %	Jan-21 Actual	Feb-21 Actual	Mar-21 Actual	2021 YTD Actual	2020 YTD Actual	Variance	Var %	YTD Budget	FY 2019 Actual
			Variance	Var %											
Revenue															
40010 Membership Revenue	782,411	659,566	122,846	18.6%	760,472	2.9%	843,763	787,830	782,411	2,414,004	1,971,775	442,229	22.4%	2,380,749	9,547,212
40020 Program Revenue	417,447	378,885	38,562	10.2%	487,687	-14.4%	450,808	382,793	417,447	1,251,049	1,109,726	141,323	12.7%	1,421,771	5,208,936
40030 Grant Revenue	79,133	69,608	9,524	13.7%	59,578	32.8%	75,856	84,414	79,133	239,402	219,876	19,526	8.9%	196,866	944,996
40040 Investment Revenue	38,304	39,517	(1,214)	-3.1%	37,837	1.2%	42,274	35,501	38,304	116,078	108,776	7,303	6.7%	105,130	466,571
Total Revenue	1,317,295	1,147,576	169,718	14.8%	1,345,574	-2.1%	1,412,700	1,290,538	1,317,295	4,020,534	3,410,153	610,381	17.9%	4,104,516	16,167,715
Expenses															
Salaries and Benefits	428,874	366,868	(62,006)	-16.9%	393,178	9.1%	413,425	393,103	428,874	1,235,401	1,120,708	114,693	10.2%	1,174,982	
Sales and Marketing	494,859	426,500	(68,359)	-16.0%	479,561	3.2%	486,181	492,079	494,859	1,473,120	1,285,812	187,308	14.6%	1,417,293	
Travel and Entertainment	3,182	2,875	(307)	-10.7%	3,075	3.5%	2,903	2,877	3,182	8,962	8,347	615	7.4%	9,290	
Professional Fees	23,635	20,640	(2,994)	-14.5%	21,829	8.3%	22,375	22,425	23,635	68,434	61,170	7,264	11.9%	66,367	
Bad Debt	116	100	(16)	-15.6%	109	6.0%	104	110	116	329	306	24	7.7%	328	
Business Insurance	4,642	3,999	(643)	-16.1%	4,623	0.4%	4,319	4,540	4,642	13,501	12,003	1,497	12.5%	13,949	
Office Supplies	5,047	4,274	(774)	-18.1%	4,677	7.9%	4,758	4,900	5,047	14,706	12,918	1,788	13.8%	14,828	
Telephone and Internet	12,674	10,973	(1,701)	-15.5%	12,084	4.9%	12,417	12,429	12,674	37,520	33,101	4,419	13.3%	37,018	
Rent and Utilities	11,285	9,723	(1,562)	-16.1%	10,020	12.6%	10,315	10,080	11,285	31,679	28,283	3,397	12.0%	30,370	
Admin Expenses	13,029	11,281	(1,748)	-15.5%	12,481	4.4%	12,399	12,153	13,029	37,581	34,383	3,198	9.3%	37,331	
Total Expenses	997,342	857,233	(140,109)	-16.3%	941,637	5.9%	969,196	954,696	997,342	2,921,234	2,597,032	324,202	12.5%	2,801,756	11,443,990
Surplus (deficit) bef. Extraordinary Items	319,953	290,344	309,828	106.7%	403,937	-20.8%	443,505	335,843	319,953	1,099,300	813,120	286,179	35.2%	1,302,760	4,723,724
Surplus (deficit) %	24.3%	25.3%	182.6%		30.0%		31.4%	26.0%	24.3%	27.3%	23.8%	46.9%		31.7%	29.2%
Other Expenses															
75010 Taxes	17,202	15,240	1,962	12.9%	47,087	-63.5%	16,915	14,125	17,202	48,242	45,875	2,367	5.2%	140,456	556,667
76010 Interest	1,290	1,222	68	5.5%	3,994	-67.7%	1,224	1,437	1,290	3,950	3,589	361	10.1%	12,732	49,077
77010 Depreciation - Building	11,550	10,583	967	9.1%	36,873	-68.7%	12,571	11,284	11,550	35,405	32,297	3,109	9.6%	107,609	418,484
77020 Depreciation - Equipment	572	493	79	16.1%	1,833	-68.8%	618	565	572	1,754	1,500	254	16.9%	5,332	20,958
77030 Depreciation - Computer	205	159	46	28.9%	582	-64.7%	181	171	205	558	506	51	10.1%	1,757	6,989
77040 Amortization	301	270	31	11.5%	884	-65.9%	263	262	301	826	837	(11)	-1.3%	2,687	10,579
Total Other Expenses	31,120	27,967	3,153	11.3%	91,253	-65.9%	31,771	27,844	31,120	90,735	84,604	6,132	7.2%	270,573	1,062,754

PLVariance



Reporting Grants Overview

solver

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Live Reporting > NFP10 - Grants Overview Report

Notifications Feedback Help Nils Rasmussen
11 NFP Demo

EDIT DELETE EXPORT TO EXCEL COMMENT SHARE SEND TO ARCHIVE HISTORY CLOSE

Data Warehouse

Report parameters

Auto-refresh: Off

Grants Overview Report

Entity: Solver Association - US

YTD Period: 202109


Granted Amount: ~\$120M
Encumbered: ~\$95M
Balance: ~\$75M

Program	Grant ID	Grant Description	Grantee	Granted Amount	Encumbered	Balance
Health Services						
	20	Africa Grant	MK Good Farangs Foundation	\$ 686,250	\$ 317,520	\$ 411,750
	21	Community Grant	State Services	\$ 3,746,250	\$ 2,822,400	\$ 2,117,446
	22	Inner City Grant	Nacho Pavarotti Foundation	\$ 5,909,760	\$ 5,232,600	\$ 1,688,503
	23	Welfare for All Grant	Foundation for Prosperity	\$ 4,961,250	\$ 1,822,500	\$ 3,720,938
	24	Liberty Grant	Bill & Melinda Gates Foundation	\$ 2,898,000	\$ 2,898,000	\$ 1,653,750
	Sub-Total			\$ 18,201,510	\$ 13,093,020	\$ 9,592,386
Education						
	20	Africa Grant	MK Good Farangs Foundation	\$ 3,098,250	\$ 1,259,955	\$ 1,991,732
	21	Community Grant	State Services	\$ 2,671,200	\$ 1,082,719	\$ 1,602,720
	22	Inner City Grant	Nacho Pavarotti Foundation	\$ 10,707,070	\$ 7,647,907	\$ 3,059,163
	23	Welfare for All Grant	Foundation for Prosperity	\$ 1,267,200	\$ 1,267,200	\$ 602,342
	24	Liberty Grant	Bill & Melinda Gates Foundation	\$ 6,642,000	\$ 4,398,994	\$ 3,830,400
	Sub-Total			\$ 24,385,720	\$ 15,656,775	\$ 11,086,357
Environment						
	20	Africa Grant	MK Good Farangs Foundation	\$ 7,646,400	\$ 7,646,400	\$ 5,197,500
	21	Community Grant	State Services	\$ 2,751,840	\$ 2,751,840	\$ 945,874
	22	Inner City Grant	Nacho Pavarotti Foundation	\$ 2,041,200	\$ 1,487,808	\$ 1,311,552
	23	Welfare for All Grant	Foundation for Prosperity	\$ 2,188,800	\$ 1,777,664	\$ 1,237,148
	24	Liberty Grant	Bill & Melinda Gates Foundation	\$ 3,609,051	\$ 3,193,714	\$ 2,082,857
	Sub-Total			\$ 18,237,291	\$ 16,857,426	\$ 10,774,931
Community Services						

Empowering Nonprofits: Streamlining Reporting & Planning

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Reporting Membership Overview



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Live Reporting > NFP12 - Membership Overview Report

Notifications Feedback Help Nils Rasmussen 11. NFP Data

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Data Warehouse

Report parameters

Auto-refresh: Off

Membership Overview Report

Entity: Western Hemisphere
YTD Period: Dec-18

Region	State	State Name	Number of Members	Actual Dues	Budgeted Dues	Variance %	New Members	New Member Target	Variance %	Drops
Midwest										
	IA	Iowa	43,158	\$ 12,947,472	\$ 13,434,624	-3.8%	668	671	-0.5%	318
	KS	Kansas	93,369	\$ 28,010,664	\$ 25,846,128	7.7%	831	844	-1.5%	692
	MI	Michigan	10,783	\$ 3,234,816	\$ 2,870,784	11.3%	93	95	-1.7%	242
	MN	Minnesota	21,242	\$ 6,372,432	\$ 5,326,560	16.4%	541	552	-2.1%	477
	ND	North Dakota	23,078	\$ 6,923,347	\$ 9,836,064	-42.1%	681	693	-1.7%	519
	OH	Ohio	24,800	\$ 7,440,120	\$ 8,588,160	-15.4%	516	518	-0.4%	548
	Sub-Total		216,430	\$ 64,928,851	\$ 65,902,320	-1.5%	3,330	3,373	-1.3%	2,795
Northeast										
	CT	Connecticut	13,682	\$ 4,104,684	\$ 4,418,640	-7.6%	643	569	11.5%	85
	NH	New Hampshire	7,217	\$ 2,165,040	\$ 2,371,500	-9.5%	550	490	10.9%	45
	PA	Pennsylvania	11,566	\$ 3,469,860	\$ 1,849,500	46.7%	419	372	11.2%	72
	Sub-Total		32,465	\$ 9,739,584	\$ 8,639,640	11.3%	1,612	1,431	11.2%	202
	Sub-Total		234,786	\$ 70,435,665	\$ 66,374,928	5.8%	2,467	2,177	11.7%	3,665
	Sub-Total		38,235	\$ 11,470,392	\$ 11,502,720	-0.3%	1,151	1,175	-2.0%	859
West										
	CA	California	11,652	\$ 3,495,744	\$ 3,973,536	-13.7%	652	655	-0.5%	258
	CO	Colorado	97,012	\$ 29,103,480	\$ 26,913,600	7.5%	562	574	-2.2%	727
	NV	Nevada	18,990	\$ 5,697,000	\$ 4,077,000	28.4%	811	823	-1.5%	424
	OR	Oregon	9,949	\$ 2,984,580	\$ 2,238,840	25.0%	681	693	-1.7%	221
	Sub-Total		137,603	\$ 41,280,804	\$ 37,202,976	9.9%	2,706	2,746	-1.5%	1,631
Grand Total			659,518	\$ 197,855,297	\$ 189,622,584	4.2%	11,266	10,901	3.2%	9,152



Demo



03

Planning

Budgeting, Forecasting, & Other Input



Planning Features

Data
integration

Parameter-
driven
models

Web-based
data entry

Budget
workflow

Built-in
comments &
line items

Dynamic
forecasting
& modeling

Planning Process

Create a template



Set storage settings



Set up a workflow



Set assignments

Planning

Long-Term Strategic Planning – Funding


Budgeting > NFP30 - Strategy Input

Notifications Feedback Help Nils Rasmussen 11: NFP Demo

Data Warehouse

Report parameters

Long Term Strategic Planning - Funding



Program Initiative	Actual 2021	Act + Fcst 2022	Strategy 2023	Strategy 2024	Strategy 2025	Strategy 2026	Strategy 2027	Strategy 2028	Strategy 2029	Strategy 2030
GLOBAL DEVELOPMENT	7,804,408	8,740,342	0	0	0	0	0	0	0	0
Financial Services for the Poor	931,836	993,181								
Special Initiatives	6,867,905	7,746,496								
Water, Sanitation, & Hygiene	4,666	665								
GLOBAL HEALTH	26,690,311	28,817,580	0	0	0	0	0	0	0	0
Infectious Diseases	11,773,615	12,959,729	0	0	0	0	0	0	0	0
Malaria	3,062,865	3,257,361								
Tuberculosis	1,842,845	1,955,872								
Pneumonia	6,867,905	7,746,496								
Delivery	3,994,701	4,250,542	0	0	0	0	0	0	0	0
Polio	3,062,865	3,257,361								
Vaccines	931,836	993,181								
HIV/AIDS	4,905,710	5,213,233								
Family Health			0	0	0	0	0	0	0	0
Maternal, Newborn, & Child	6,867,905	7,746,496								
Family Planning	931,836	993,181								
Nutrition	6,867,905	7,746,496								
Policy & Advocacy	1,110,576	1,180,844								
Discovery Cross-Cutting	4,905,710	5,213,233								
UNITED STATES PROGRAM	5,105,277	5,431,385	0	0	0	0	0	0	0	0
NON-PROGRAM GRANTS	3,067,531	3,258,026	0	0	0	0	0	0	0	0
Family Interest Grants	4,666	665								
Charitable Sector Support	3,062,865	3,257,361								
TOTAL	42,667,527	46,247,334	0	0	0	0	0	0	0	0


35,000,000

PL Variance

Spreading and Line item details



Planning Membership Planning



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Live Reporting > NFP32 - Membership Planning Form

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Data Warehouse

Report parameters

Auto-refresh: Off


Membership Enrollment Form

Membership Type:	Number of Members Invoiced	Retention Rate	Fee Rate	CAR Dues - Existing Members	Retained Members
R/DR	15,000	96%	\$ 279.00	\$ 3,692,972	14,400
Secondary	279	70%	\$ 223.00	\$ 53,317	195
Leasing	379	97%	\$ 50.00	\$ 15,392	368
Non-members	124	97%	\$ 300.00	\$ 32,667	120
VIP's	82	80%	\$ 500.00	\$ 41,000	66
Totals:	15,864		\$	3,835,348	

Monthly Projections:	Member adds	Dues	Application Fee	IAR Fund	
February	100	\$ 240.00	24,000	35 \$ 350.00	
March	200	\$ 210.00	42,000	35 \$ 1,300.00	
April	130	\$ 180.00	23,400	35 \$ 1,300.00	
May	122	\$ 150.00	18,300	30 \$ 1,300.00	
June	154	\$ 120.00	18,480	30 \$ 1,300.00	
July	165	\$ 90.00	14,850	30 \$ 1,300.00	
August	164	\$ 75.00	12,300	30 \$ 1,300.00	
September	132	\$ 60.00	7,920	25 \$ 1,300.00	
October	144	\$ 45.00	6,480	25 \$ 1,300.00	
November	143	\$ 30.00	4,290	25 \$ 1,300.00	
December	200	\$ 15.00	3,000	25 \$ 1,300.00	
January	100	\$ 10.00	1,000	25 \$ 1,300.00	
Totals:	1,754	\$ 1,225.00	176,020	\$ 350	14,650.00

Empowering Nonprofits: Streamlining Reporting & Planning

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Demo



04

Dashboards



Dashboards

Tools for Data Visualization & Business Intelligence

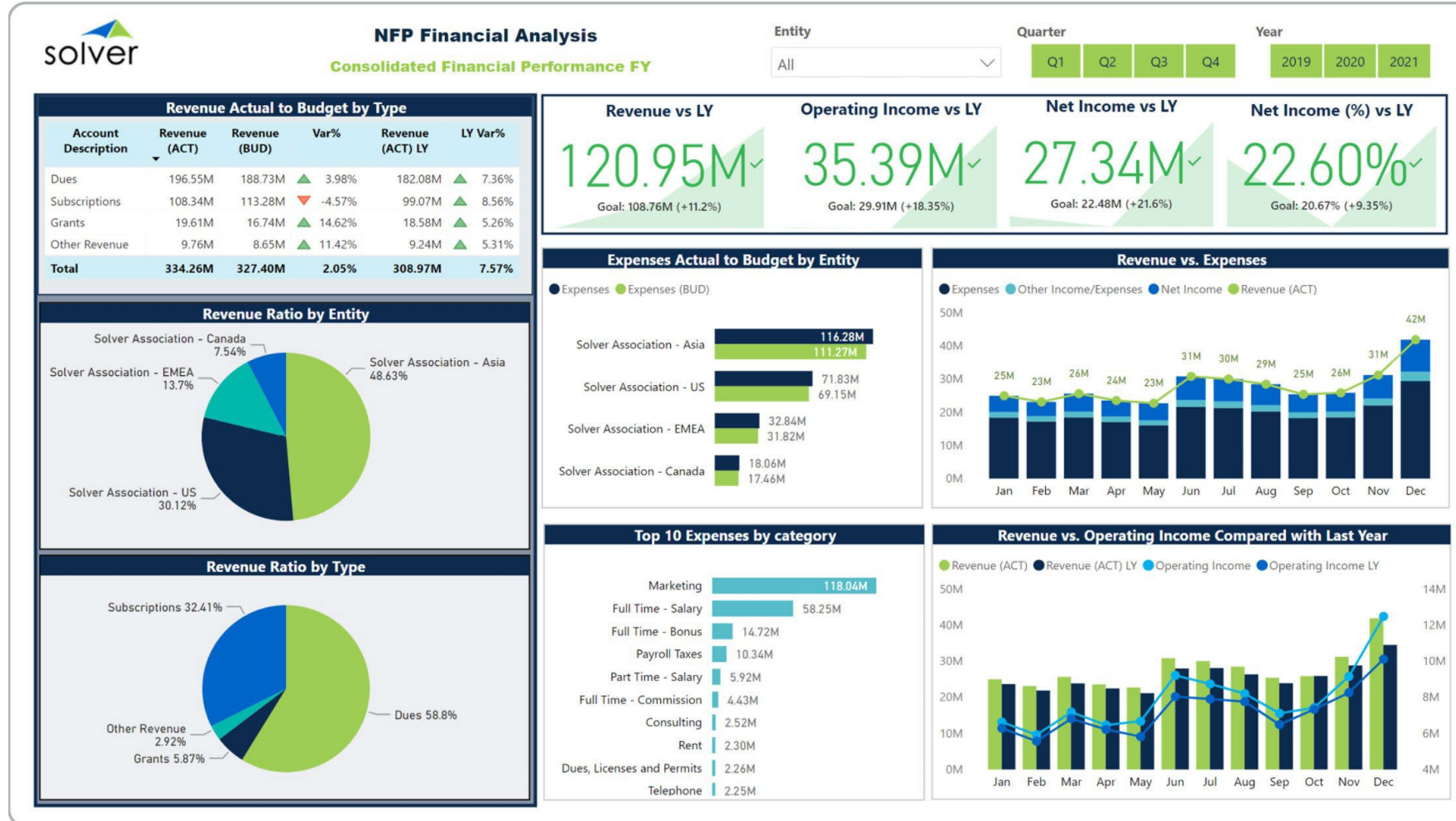
Solver
Reports

Power BI

Tableau

Dashboards

Financial Analysis



Dashboards

Nonprofit – Events & Grants Dashboard


All Programs - All Grants

NFP Events (Forecast)

Events:

Attendee by Event	Top 5 Budget by Event Task
Annual Conference 54,900	Ticket Sales: 2.06M
Lunch & Learn 1,011	Budget Attendees: 0.43M
Golf tournament 531	Food/Beverage: 0.05M
End of Year Training 502	Housing: 0.05M
	Printing: 0.04M

Budget by Events



NFP Grants

Month: Program: Grant:

Grant Amount by Program



Grant Amount Ratio



Encumbered by Program

Program	Encumbered
Community Services	195.41M
Education	83.17M
Health Services	51.77M
Environment	73.54M
Economic Justice	40.24M

Grant Requested vs. Grant Declined

Grant	Grant Requested	Grant Declined	Declined %
Inner City Grant	2,628.53	1,085.56	41.30%
Welfare for All Grant	2,247.22	976.94	43.47%
Community Grant	2,427.05	970.39	39.98%
Melbourne Grant	2,481.50	823.37	33.18%
Liberty Grant	1,918.29	608.83	31.74%
Total	11,702.59	4,465.08	38.15%

Grant Requested vs. Grant Declined by Program



Encumbered and Balance Actual to Budget by Grant



Solver Templates Marketplace & Examples

Solver Marketplace

Accelerate time to value with these templates for reports, planning forms, and dashboards.

MARKETPLACE SHOWCASE

Enter search phrase Search SORT

FUNCTIONALITY

- Reports
- Planning
- Dashboard
- Connector

DATA SOURCE

Select a Data Source

Share Search Results

Summary Level Sales Dashboards
Sales Summary Dashboard provides information on revenue, average deal size, with views for top ...

Sales Team Focused Sales Dashboard
PowerBI Dashboard providing sales team focused sales information such as top sales persons sale...

Item Focused Sales Dashboard
PowerBI Dashboard providing item focused sales information such as top 10 items sold month to d...

Customer Focused Sales Dashboard
PowerBI Dashboard providing customer focused sales information such as top 10

CRM Opportunities - Sales Person Summary
CRM report offering sales person summary of active in deals in both granular and

Asset & Liability Analysis - Variances and Trends
Graphical variance and trend analysis of Asset and Liability categories

<https://www.solverglobal.com/marketplaces-templates>

Q&A



Business
Technology
Services

Questions?

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