

Imagine You Have a Specialist in Every Area of FP&A

Imagine a future where Solver Copilot is a suite of AI agents that function as specialized assistants designed to transform how organizations approach budgeting, forecasting, and financial decision-making.

More than traditional GenAI tools, Solver Copilot aims to provide you an intelligent specialist in every area of extended financial planning and analysis (xFP&A), helping you gain insight better, faster, and more intelligently by consolidating all your ERP and other key data sources into one trusted source for analysis.



Intelligent Agents Designed to Revolutionize xFP&A



Accelerate intelligent
decisions with
AI-powered analysis

Accelerate intelligent
decisions with
AI-powered predictions

Accelerate
time-to-value with
expert level assistance

The Foundation: Solver's Data Warehouse

Your Data, Intelligently Connected

Solver Copilot's intelligent agents will leverage Solver's data warehouse, which consolidates information from all your critical business systems into a trusted, single source of truth. This unified foundation enables AI agents to deliver insights based on complete, accurate, and contextual data.

The power of Solver Copilot's agents comes from the quality and breadth of data they will be able to access:

- **Complete Context** - AI agents can analyze data across your entire organization, not just isolated silos
- **Historical Intelligence** - AI can leverage years of consolidated data to identify trends and patterns
- **Cross-Source Correlation** - Connect insights from multiple systems to uncover hidden relationships
- **Trusted Accuracy** - All AI recommendations are based on validated, curated data from your data warehouse
- **Real-Time Insights** - Accelerate Intelligent Decisions

Accelerate Intelligent Decisions with Solver Copilot

Analysis Agent - Intelligent Business Insights

The Analysis Agent will work directly with your Solver data warehouse to elevate data analysis through deep, contextual, and proactive insights:

- **Anomaly Detection & Insights** - Identify outliers and deviations by analyzing patterns across your complete data warehouse
- **Predictive Recommendations** - Leverage historical data to forecast trends and inform better decisions
- **Deep Contextual Analysis** - Understand relationships between data from multiple sources within Solver
- **Proactive Intelligence** - Monitor your Solver data continuously to anticipate business needs and opportunities

Planning Agent - Next-Generation Forecasting

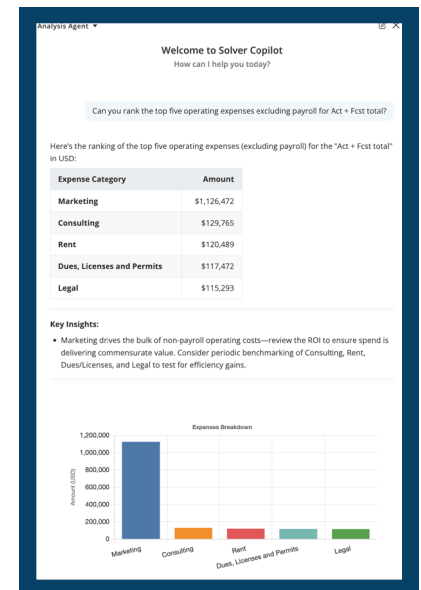
The Planning Agent will use your consolidated Solver data to transform budgeting and forecasting:

- **Data-Driven Accuracy** - Generate precise forecasts using historical trends from your unified data warehouse
- **Collaborative Intelligence** - Create smarter planning models informed by comprehensive organizational data
- **Strategic Alignment** - Ensure forecasts align with actual performance data across all systems
- **Intelligent Validation** - Cross-reference planning assumptions against real data in Solver

Help Agent - Expert Guidance

The Help Agent is your intelligent, always-available expert, trained on comprehensive Solver documentation, training materials, and continuously learning from new content. Key capabilities include:

- **Smart Onboarding** - Step-by-step guidance and interactive walkthroughs for new users
- **Real-time Contextual Help** - Instant assistance while navigating the Solver platform
- **Advanced User Support** - Expert guidance for building complex reports, planning templates, and data integrations
- **Adaptive Learning** - Evolves with user behavior and product updates for increasingly relevant assistance
- **Self-Service Excellence** - Reduces reliance on support teams through intelligent problem resolution



Solver Copilot

You
How do I configure Publisher to send reports via email?

Solver Copilot
To configure Solver Publisher to send reports through email, follow these steps:

Steps to Configure Publisher for Email Distribution

- Access the Publisher Module:**
 - Ensure you have purchased and activated the Publisher feature. If not, contact your salesperson to enable it.
 - Navigate to the **Publisher** module in the Solver Cloud portal.
- Create a New Publisher Subscription:**
 - Click the **New** icon in the upper right-hand corner to open the Publisher Subscription wizard.
- Set Up the Subscription:**
 - Name:** Enter a user-friendly name for the subscription. This name will appear in the subject line of the email.
 - Description:** (Optional) Add a description for internal reference. This will not appear in the email.
 - Company:** If your organization has multiple companies, select the appropriate one from the dropdown.

Hey, ask anything about Solver...

Experience the Next Generation of Financial Planning & Analysis

Schedule a demo today to see how Solver's xFP&A solution combined with intelligent insights from Solver Copilot can transform your financial and operational planning and analysis processes.

Disclaimer: The AI features described above are planned for release over the next year. Availability and timelines are subject to change.

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Learn More:

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