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FINANCE + IT • THE QUESTION • FAQ 03 • EVALUATING SOLVER • FAQ SERIES

How does Solver connect finance data from ERP and operational systems?

A practical look at the route between source systems and the reporting, consolidation or planning structure.

THE SHORT ANSWER

Solver uses supported connectors and data integration methods selected for the organisation's source systems and required outputs.

THE CONNECTION ROUTE

The connection method reflects the systems involved

Solver can connect financial and operational information from ERP, CRM, databases and files. The selected route depends on the available integration, the source environment and how the data will support the finance process.

01 QUICKSTART CONNECTORS

Pre-built integrations support selected ERP platforms, including Microsoft Dynamics, Sage Intacct and Acumatica.

02 OTHER DATA ROUTES

SQL, OData, gateway connections and file imports can support additional financial and operational sources.

03 SOLVER DATA STRUCTURE

Source information is mapped into the dimensions, accounts and organisational structure required for the finance output.

The implementation defines the connector, mapping and refresh process.

WHAT GETS CONFIGURED

The integration is shaped around the required finance process

The project team defines how relevant information moves from each source into a supported reporting or planning structure.

01 SOURCE SCOPE

Which entities, accounts, dimensions, transactions and operational measures are required?

02 MAPPING

How should source fields align with the reporting, consolidation or planning model?

03 REFRESH PROCESS

How frequently should each source update, and who will monitor the connection?

04 ACCESS + WRITEBACK

Which users can access the data, and does the supported integration require approved data to return to the ERP?

The precise setup depends on the systems, connector capabilities and finance outputs in scope.

WHAT THIS MEANS IN PRACTICE

A defined data route supports each recurring finance output

01

SOURCE

ERP, CRM, databases, files and other operational systems

02

CONNECTION

Connector, mapping, refresh and any supported writeback requirements

03

OUTPUT

Reports, consolidations, budgets, forecasts and supporting drilldown

The connection is configured around the information finance needs to use repeatedly, with the source route and ownership agreed during implementation.

Evaluating reporting and planning software?

Talk to Solver Ireland at info-ireland@solverglobal.com about the finance output and source systems your project needs to connect.

