solver

SOLVER
for Real Estate Companies

Get Complete Insight

Updated: July 2020

www.solverglobal.com

Solver, Inc. | Copyright © 2020

Table of Contents

Introduction

The purpose of this white paper is to provide an overview of Solver. With frequent, automated cloud updates, the solution is continuously being enhanced to drive faster, better decisions across its global customer base. For the latest information or to discuss your specific needs, please contact your local Solver partner, visit Solver's web-site or email us at info@solverglobal.com.

Check out the Solver Showcase page for hundreds of reporting, planning and dashboard examples.

Product Summary

Solver provides a single, cloud-based solution that automates reporting and planning processes, and supports faster and better decisions based on key information from across the organization's data sources.

Key benefits that Solver provides include:

- A top-rated Corporate Performance Management (CPM) solution by G2 based on user satisfaction
- Global partner channel with industry expertise to help you whenever and wherever
- Cloud software, support, and upgrades packaged into a subscription price providing unmatched ROI over traditional CPM solutions
- Built for business users to manage the entire solution without the need for developers
- Executive and management data from across the organization that is easily accessible in ONE place with Solver's intelligent data warehouse
- Solver's multi-tenant cloud application provides quick initiation, SOC 2 compliance, automatic software upgrades, and scalability at one's convenience
- Solver provides the power and the familiarity of cloud-connected Excel to solve the most complex formula and layout requirements for reporting and planning template designers
- Easy-to-use, pre-built integration to Power BI, the world's #1 visualization solution
- Fast and cost effective integrations provided with Solver's wizard-driven CSV, SQL, and prebuilt ERP/CRM Connectors
- Unlimited access to reports and dashboards from secure web portal
- Hybrid cloud option provides customers with real-time cloud reporting capabilities for their on-premise ERP system
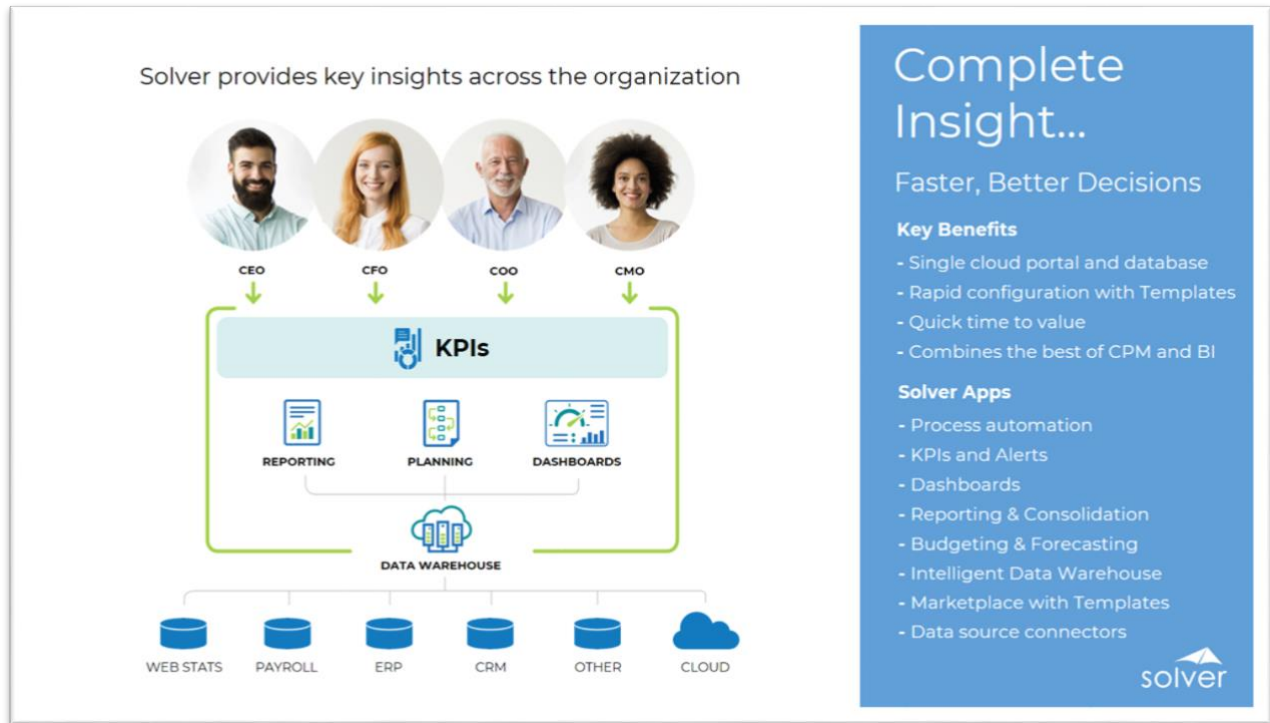
Company Summary

Solver, Inc. is redefining the category of cloud-based reporting and planning. The Solver solution is built to enable faster and better business decisions across the entire organization. Solver combines financial and other key data into a single tool, powered by the most flexible report and planning form designer on the market. Organizations use this solution to automate and streamline financial and operational reports, consolidations, and budgeting and forecasting processes. Solver empowers users with complete insight that drives intelligent decisions and competitive advantages. Headquartered in the United States, Solver, Inc. has more than a dozen offices and hundreds of partners globally that provide local and industry expertise. To learn more, visit www.solverglobal.com.

RE01 - COO Dashboard

The **COO Dashboard** example prepares answers to the questions that a COO (Chief Operating Officer) often is being asked, in a single dashboard view. The COO will be able to provide answers about:

- US Sales Trend – ACT vs BUD
- Revenues by Status
- Top 5 Projects – Month of Stock
- Available Units by State
- US Sales MTD – ACT vs BUD
- Sold Units Trend
- Top 5 Projects – Monthly Average Speed
- Top 5 Agents – US Sales
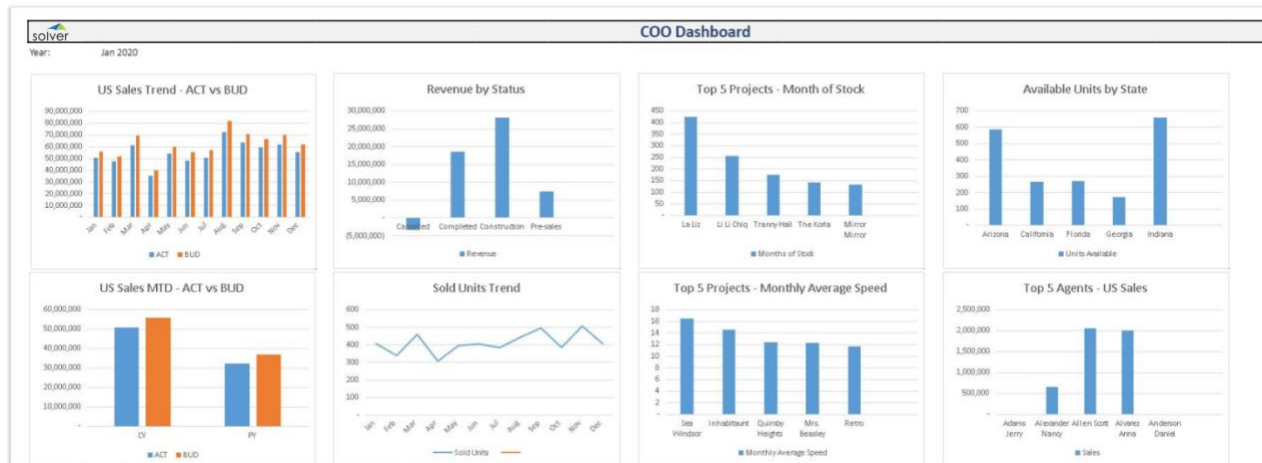
RE02 - Project Comparison Dashboard

The **Project Comparison Dashboard** example shows an overview of the Real Estate Projects that contribute the most to the company's revenues. Project Managers will be able to monitor the following for the selected Fiscal Year:

- The Top 10 Projects based on sales
- US$ Sales vs Target Data
- Months of Stock
- Monthly Avg Speed
- Sold Units Trend
- Added Units Trend
- Available Units Trend

Visit us: www.solverglobal.com
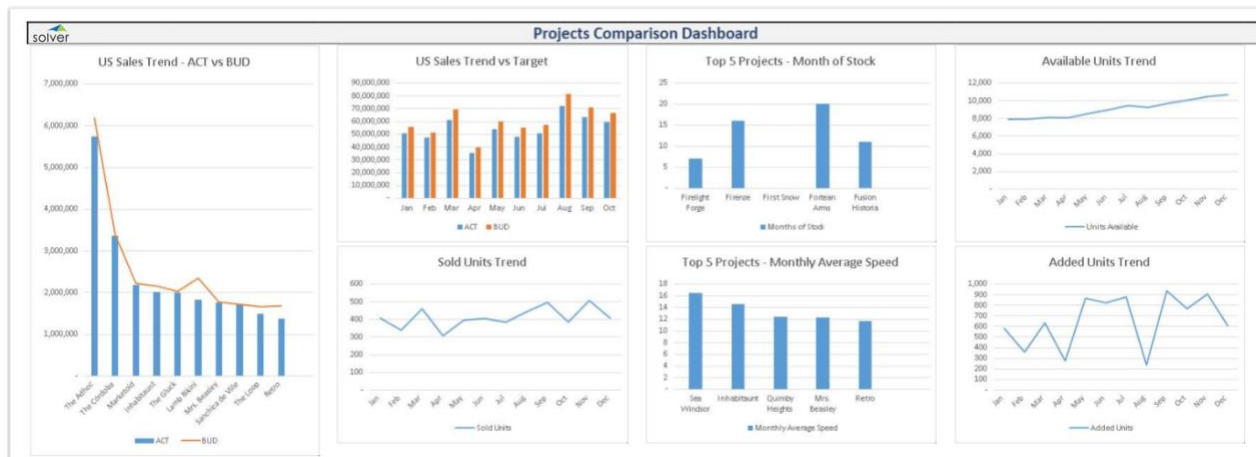
RE03 - Region Comparison Dashboard

The **Region Comparison Dashboard** example shows the performance of your sales in every market (here: U.S. state) where you have presence. As an executive, you will be able to know the sales performance of the company across the country. This dashboard can also highlight which markets are the biggest contributors to your sales and which markets are not reaching their planned targets, enabling you to focus your attention where it is needed most. Choose the Fiscal Year you need to monitor and wait a few seconds to have your finger on the pulse of your Real Estate business!
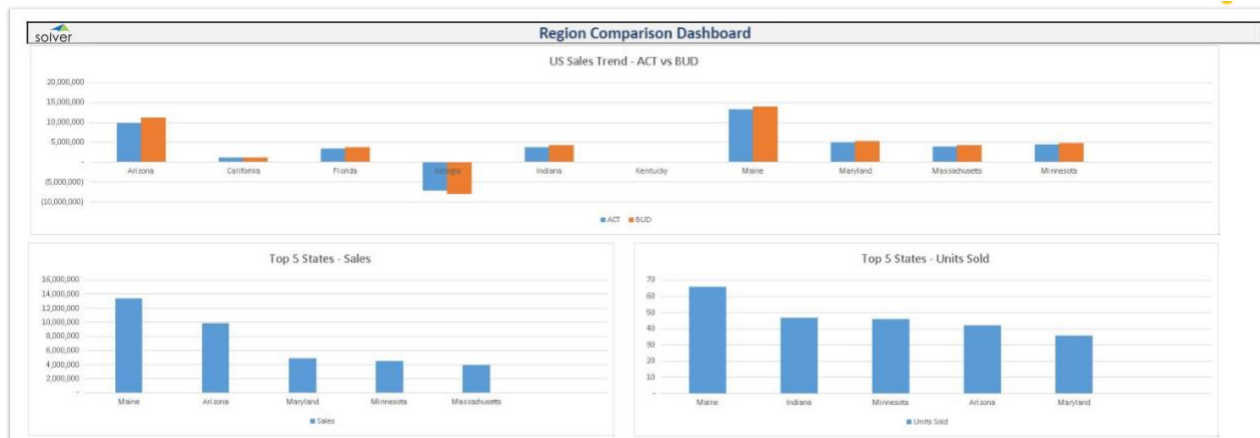
RE04 - Agent Comparison Dashboard

The **Agent Comparison Dashboard** example analyzes the performance of your team of real estate agents. Team Leaders will be able to monitor the agents that contribute the most to the sales of the company. Select a realtor agent from the list on the parameter, and the dashboard will display his/her contribution to the total sales of the company, month by month, in terms of Sales and Sold Units.
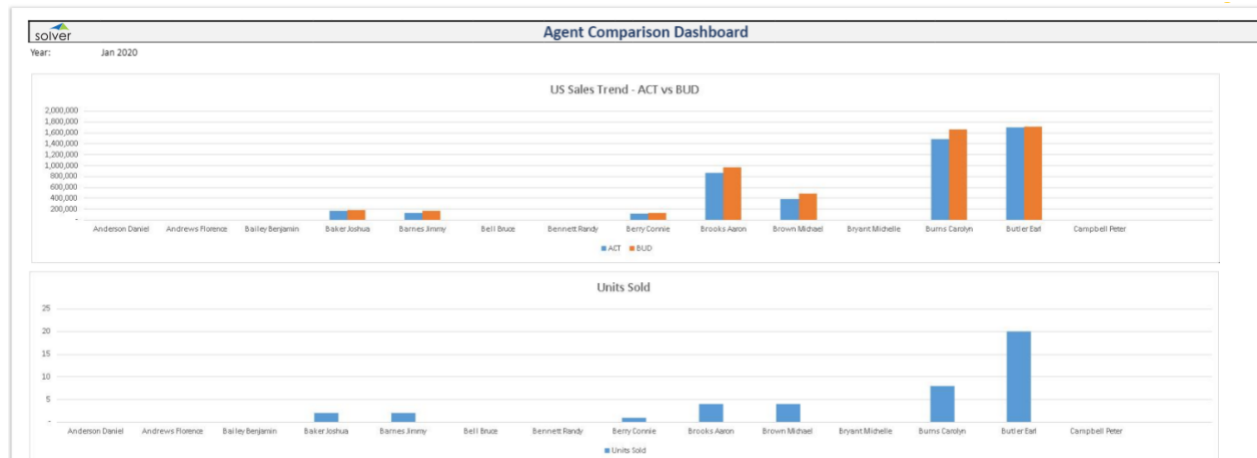
RE05 - Bank Comparison Dashboard

The **Bank Comparison Dashboard** example shows which banks finance the most Real Estate Projects in the current year. This is the starting point to discover if there's a relation between the bank services and the sales performance of the projects. A pie graph displays what is the participation each bank as a percent of total sales of the company for the selected Fiscal Year.
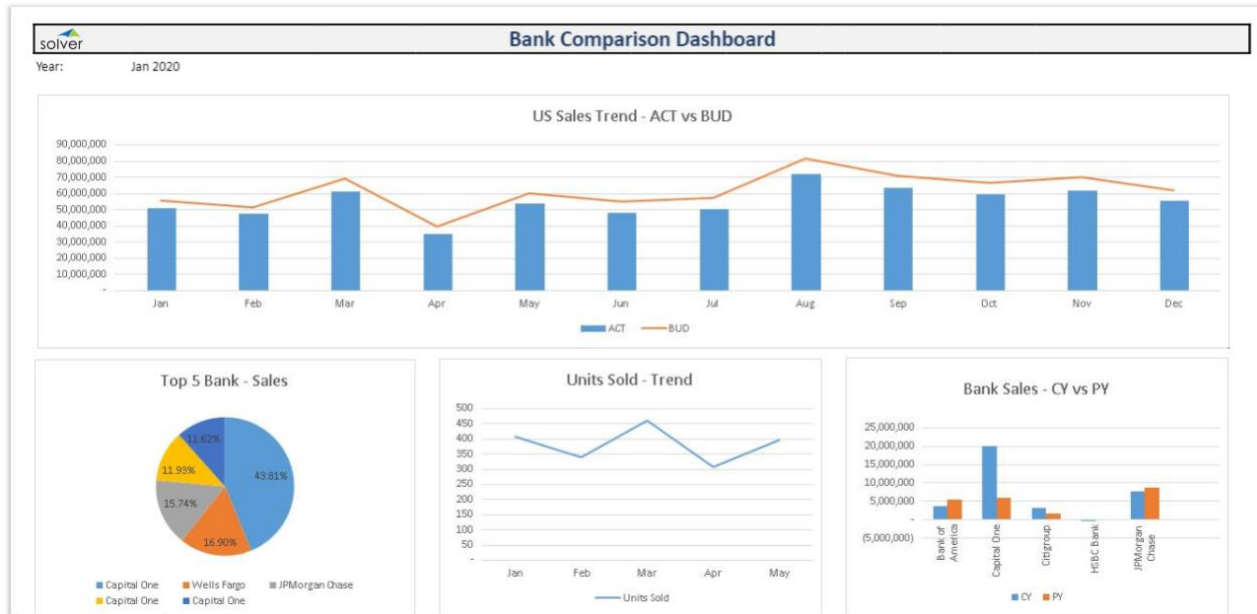
RE08 - Sales Performance

The **Real Estate Sales Performance Report** example shows the Sales Amount and Number of Sold Units for every region (here: State) in which your company has a presence, in a grid and graph view. You can monitor the accumulated figures for all of the year and the current quarter. Remember that you can execute the report from Excel, the Web Portal or mobile app, whatever works best for you. The report can also be automatically executed and emailed to an unlimited number of non-licensed users (such as your real estate agents).

Real Estate - Sales by State in U.S. Market
SELECTED PERIOD: DECEMBER-2021
SELECTED REALTOR AGENCY: 'BI360 REALTORS'

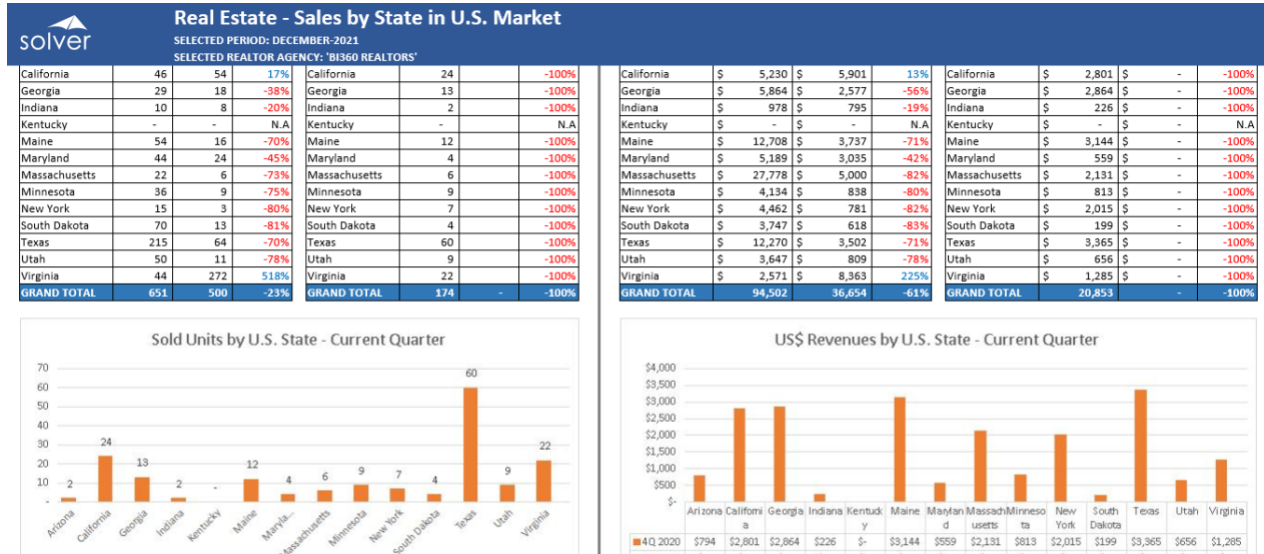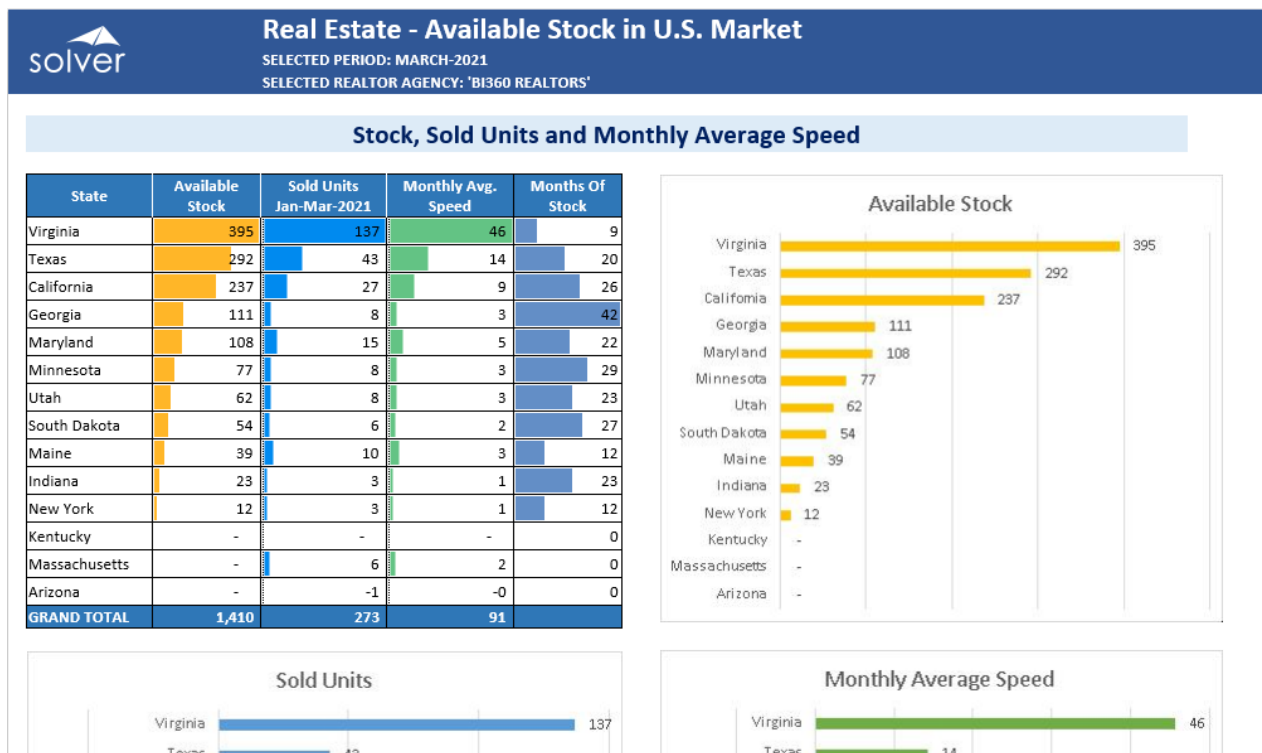|																				
California	46	54	17%	California	24		-100%	California	$	5,230	$	5,901	13%	California	$	2,801	$	-	-100%
Georgia	29	18	-38%	Georgia	13		-100%	Georgia	$	5,864	$	2,577	-56%	Georgia	$	2,864	$	-	-100%
Indiana	10	8	-20%	Indiana	2		-100%	Indiana	$	978	$	795	-19%	Indiana	$	226	$	-	-100%
Kentucky	-	-	N.A	Kentucky	-		N.A	Kentucky	$	-	$	-	N.A	Kentucky	$	-	$	-	N.A
Maine	54	16	-70%	Maine	12		-100%	Maine	$	12,708	$	3,737	-71%	Maine	$	3,144	$	-	-100%
Maryland	44	24	-45%	Maryland	4		-100%	Maryland	$	5,189	$	3,035	-42%	Maryland	$	559	$	-	-100%
Massachusetts	22	6	-73%	Massachusetts	6		-100%	Massachusetts	$	27,778	$	5,000	-82%	Massachusetts	$	2,131	$	-	-100%
Minnesota	36	9	-75%	Minnesota	9		-100%	Minnesota	$	4,134	$	838	-80%	Minnesota	$	813	$	-	-100%
New York	15	3	-80%	New York	7		-100%	New York	$	4,462	$	781	-82%	New York	$	2,015	$	-	-100%
South Dakota	70	13	-81%	South Dakota	4		-100%	South Dakota	$	3,747	$	618	-83%	South Dakota	$	199	$	-	-100%
Texas	215	64	-70%	Texas	60		-100%	Texas	$	12,270	$	3,502	-71%	Texas	$	3,365	$	-	-100%
Utah	50	11	-78%	Utah	9		-100%	Utah	$	3,647	$	809	-78%	Utah	$	656	$	-	-100%
Virginia	44	272	518%	Virginia	22		-100%	Virginia	$	2,571	$	8,363	225%	Virginia	$	1,285	$	-	-100%
GRAND TOTAL	**651**	**500**	**-23%**	**GRAND TOTAL**	**174**	**-**	**-100%**	**GRAND TOTAL**		**94,502**		**36,654**	**-61%**	**GRAND TOTAL**		**20,853**		**-**	**-100%**

RE09 - Real Estate Stock Analysis

The **Real Estate Stock Analysis Report** example tells you, for every region (here: State) in which your company has presence, four key metrics to analyze in your real estate inventory:

- Available Stock (available properties)
- Sold Units
- Monthly Average Speed
- Months Of Stock (properties)

Remember that you can execute the report from Excel, the Web Portal or mobile app - whatever works best for you. The report can also be automatically executed and emailed to an unlimited number of non-licensed users (such as your real estate agents).

Real Estate - Available Stock in U.S. Market

SELECTED PERIOD: MARCH-2021
SELECTED REALTOR AGENCY: 'BI360 REALTORS'

Stock, Sold Units and Monthly Average Speed

State	Available Stock	Sold Units Jan-Mar-2021	Monthly Avg. Speed	Months Of Stock
Virginia	395	137	46	9
Texas	292	43	14	20
California	237	27	9	26
Georgia	111	8	3	42
Maryland	108	15	5	22
Minnesota	77	8	3	29
Utah	62	8	3	23
South Dakota	54	6	2	27
Maine	39	10	3	12
Indiana	23	3	1	23
New York	12	3	1	12
Kentucky	-	-	-	0
Massachusetts	-	6	2	0
Arizona	-	-1	-0	0
GRAND TOTAL	1,410	273	91	

Available Stock

Virginia	395
Texas	292
California	237
Georgia	111
Maryland	108
Minnesota	77
Utah	62
South Dakota	54
Maine	39
Indiana	23
New York	12
Kentucky	-
Massachusetts	-
Arizona	-

Sold Units

Virginia — 137
Texas — 43

Monthly Average Speed

Virginia — 46
Texas — 14

Visit us:

RE20 – Sales Budget Form

This **Sales Budget Form** is an example of a data entry form (requires Solver Planning license) that easily collects sales budgets/forecast for every Real Estate Project for the Fiscal Year of the selected period. Your users simply need to input the parameters in the yellow columns and the form will calculate the amounts for every single period. Once saved, the form will instantly transfer to the Solver Data Warehouse where you can view it in Solver's reports. It's that easy!

BI360 REALTORS
Sales Target by Real Estate Project

Year: 2021
Account: 40010
Currency: U.S. Dollars
Entity: Corporate US
Scenario: Opening Balance Budget

|		202101	202101	202101	202101	202101				Sales Amounts (in Thousands)									
Project Id	Project	Available Units	Property Avg. Area	Square Meter Avg. Price	Monthly Avg. Speed	Beginning Month	Month Of Stock	Property Avg. Price	Monthly Avg. Sales	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
1933	Albemarle	5	50				0.00	0	0	0	0	0	0	0	0	0	0	0	0
1806	Global Golf Residence	5			0.08		62.50	0	0	0	0	0	0	0	0	0	0	0	0
1676	Imperative	66			2.33		28.33	0	0	0	0	0	0	0	0	0	0	0	0
1710	Maguey	25			0.67		37.31	0	0	0	0	0	0	0	0	0	0	0	0
1730	Notorious	59			2		29.50	0	0	0	0	0	0	0	0	0	0	0	0
1745	Pencil Neck Suites	79			0.75		105.33	0	0	0	0	0	0	0	0	0	0	0	0
1772	Sea Windsor	186			4.42		42.08	0	0	0	0	0	0	0	0	0	0	0	0
1794	The Big One	27			1.08		25.00	0	0	0	0	0	0	0	0	0	0	0	0
1795	The Blockloc	27			0		0.00	0	0	0	0	0	0	0	0	0	0	0	0
1804	The Corey Flintoff	2			0		0.00	0	0	0	0	0	0	0	0	0	0	0	0
1805	The Crustacean	4			0.17		23.53	0	0	0	0	0	0	0	0	0	0	0	0
1807	The Crustacean Prince	3			0		0.00	0	0	0	0	0	0	0	0	0	0	0	0
1808	The Deuce	3			0		0.00	0	0	0	0	0	0	0	0	0	0	0	0
1809	The Dollop	3			0		0.00	0	0	0	0	0	0	0	0	0	0	0	0
1810	The Duke	4			-0.08		-50.00	0	0	0	0	0	0	0	0	0	0	0	0
1811	The Element	3			0		0.00	0	0	0	0	0	0	0	0	0	0	0	0
1812	The Expectation	5			0.17		29.41	0	0	0	0	0	0	0	0	0	0	0	0
1815	The Fortean	9			0.42		21.43	0	0	0	0	0	0	0	0	0	0	0	0
1816	The Francis Bacon	2			0		0.00	0	0	0	0	0	0	0	0	0	0	0	0

Real Estate Power BI Dashboards

Real Estate Executive Dashboard:
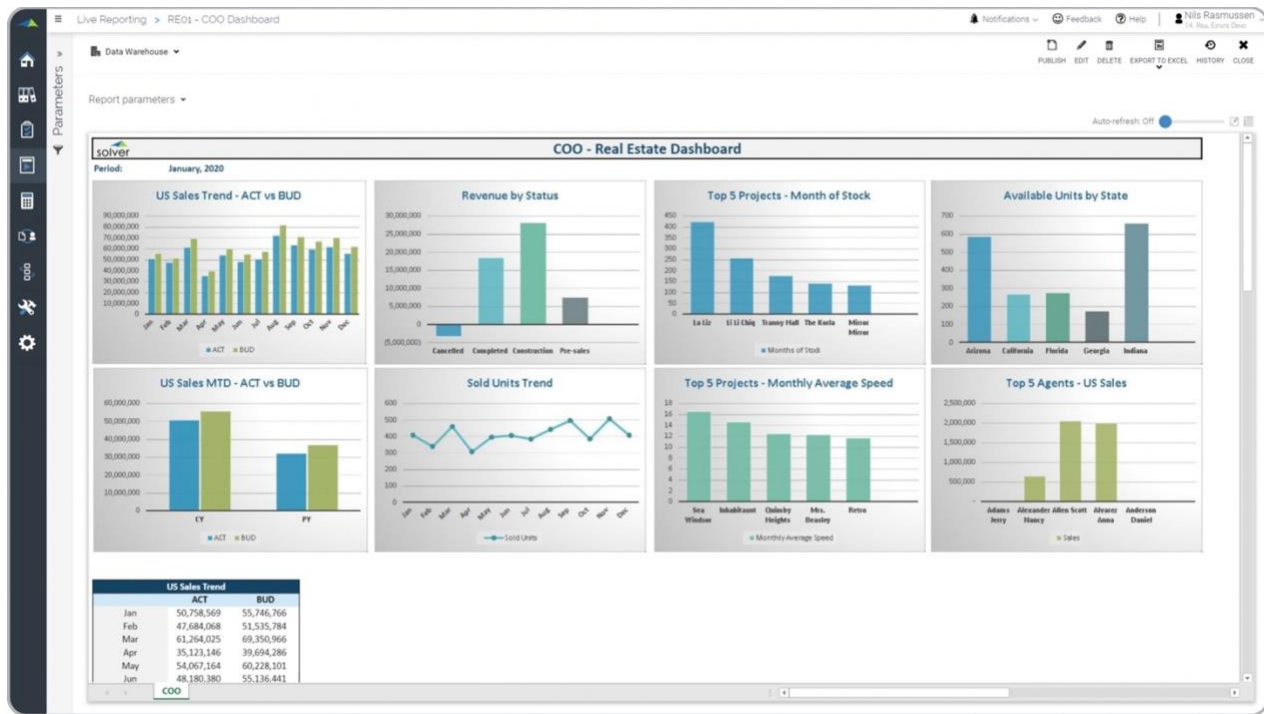
Real Estate Project Comparison Dashboard:
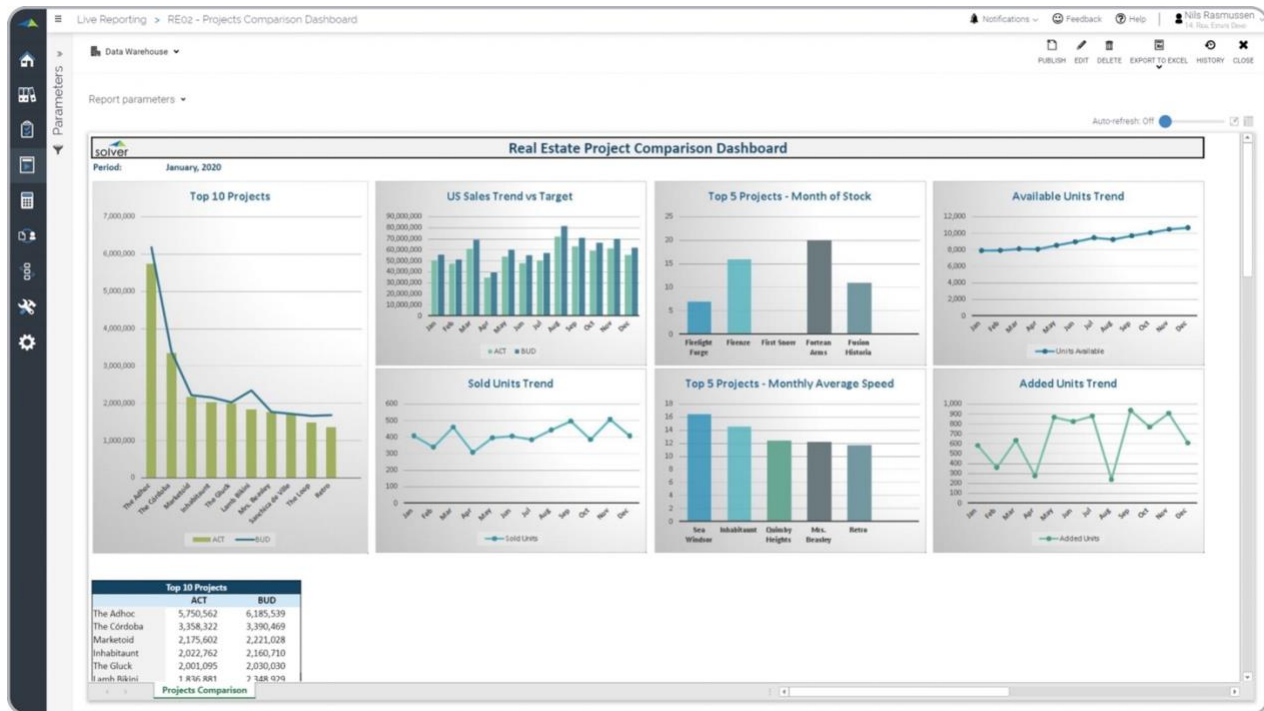
Real Estate Regional Comparison Dashboard:
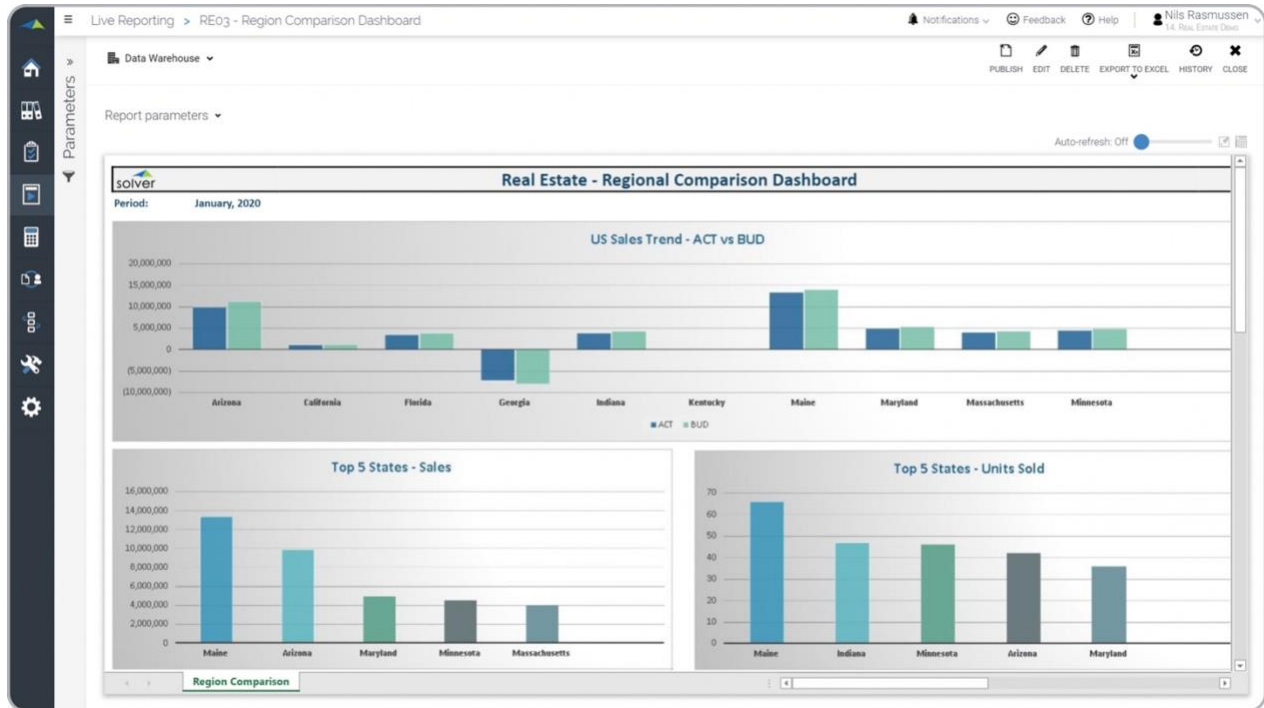
Real Estate Bank Comparison Dashboard:

Real Estate Agent Comparison Dashboard: