SOLVER PLANNING AND REPORTING

A hire starts later. What changes in your forecast?

See how Solver connects planning inputs with reporting.

ONE FAMILIAR FORECASTING CHANGE

Your budget assumed an earlier start. The hire is now expected to join later, moving salary costs into later forecast periods. How would you reflect that change and explain its effect?

01 Start with the planning input

Solver combines Excel-designed input forms with web-based contributions. In a demo, see where a revised hiring assumption is entered and how a personnel model uses it in salary calculations.

Payroll Budget

Corporate US SUS
Administration 100
Budget BUD

Employee Name	Title	Hire Date	Hire Month	End Month	Annual Hours	Rate	Salary	Increase Month	% Increase	$ Increase	Ending Rate	Ending Salary	Benefits Eligible (Y/N)	Jan-22
Administration														
Full Time Employees														
Freddie Mauer	CEO	1/1/2001			2,080.0	95.67	199,000				95.67	199,000		16,901
Emily Martinez	CFO	4/12/2004			2,080.0	92.75	192,920				92.75	192,920		16,385
Dustin McCann	COO	7/15/2008		Feb	2,080.0	91.88	191,115				91.88	191,115		16,232
Justin Posada	Administrative Assistant	5/3/2008			2,080.0	26.25	54,600				26.25	54,600	Y	4,637
Joanne Suzuki	Administrative Assistant	12/10/1997		Mar	2,080.0	21.88	45,515				21.88	45,515		3,866
Chris Molina	Administrative Assistant	7/7/2007			2,080.0	24.58	51,135				24.58	51,135		4,343
Christine Montero	Office Manager	6/6/2006			2,080.0	26.47	55,066	Apr	5.00%		27.80	57,819		4,677
Luis Pierzynski	Vice President	5/5/2005			2,080.0	84.00	174,720				84.00	174,720		14,839
Tracy Molina	Vice President	4/4/2004			2,080.0	83.13	172,915	Feb	10.00%		91.45	190,207		14,686
To Be Hired #1	Admin		Jan		2,080.0	36.54	76,000				36.54	76,000		6,455
To Be Hired #2	Admin		Feb		2,080.0	43.27	90,000				43.27	90,000		0
To Be Hired #3	Vice President		Mar		2,080.0	72.12	150,000				72.12	150,000	Y	0
											0.00	0		0
											0.00	0		0

Personnel planning example: hiring assumptions alongside salary inputs.

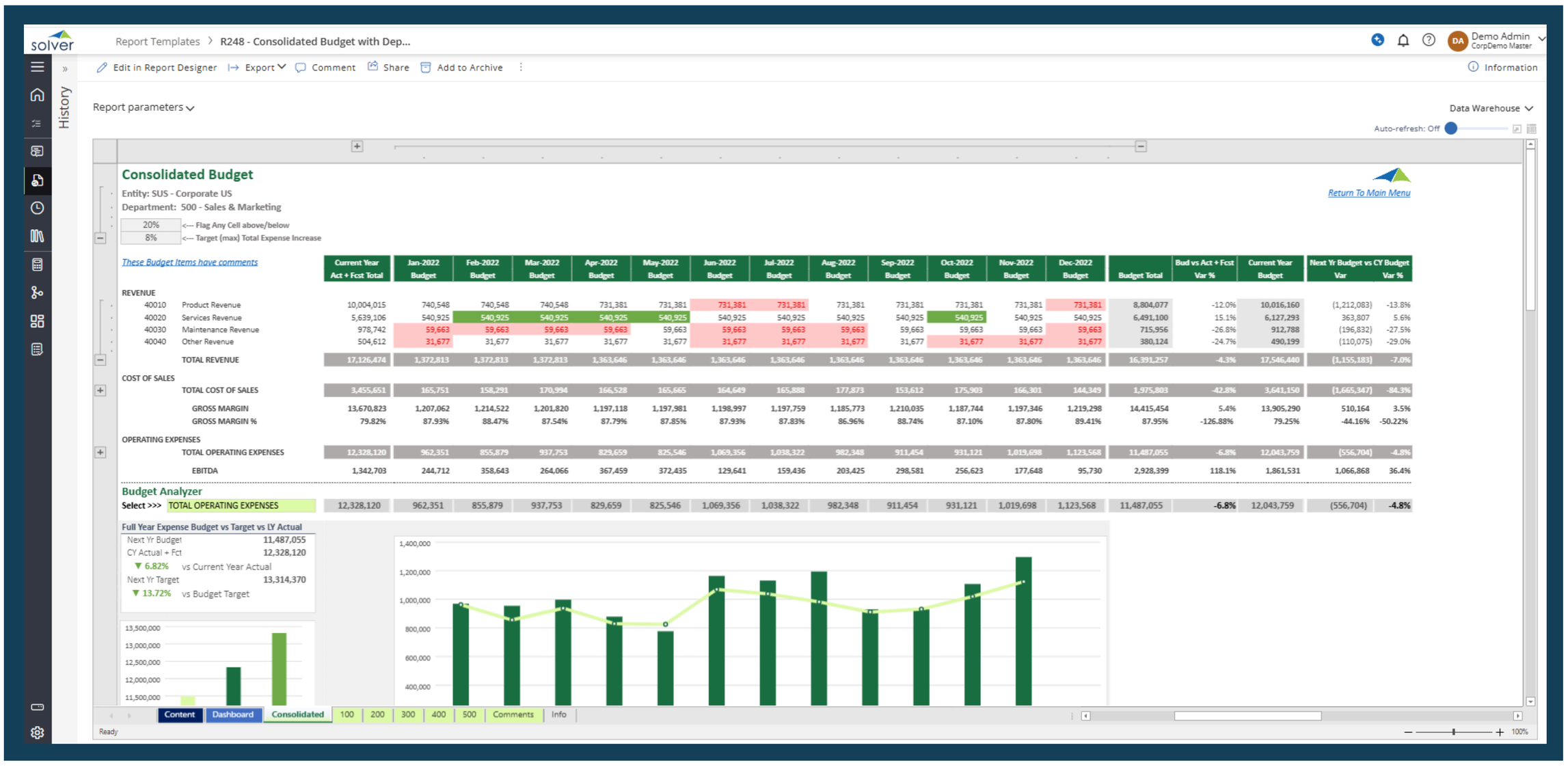
Source: Solver Global planning | B204 Personnel template (cropped)

Next: compare the outlook and explain the reported position.

Keep the plan.
Compare the latest outlook.

02 Understand what has moved

Solver supports multiple budget and forecast versions. In the hiring example, compare the revised forecast with the approved budget or an earlier outlook to see the change in expected staff costs.



Official consolidated budget report: period budgets, totals and comparisons.

Source: Solver Global planning | R248 Consolidated Budget template

Two useful reference points

The budget preserves the original plan. The forecast shows what you now expect. Comparing them helps explain the change.

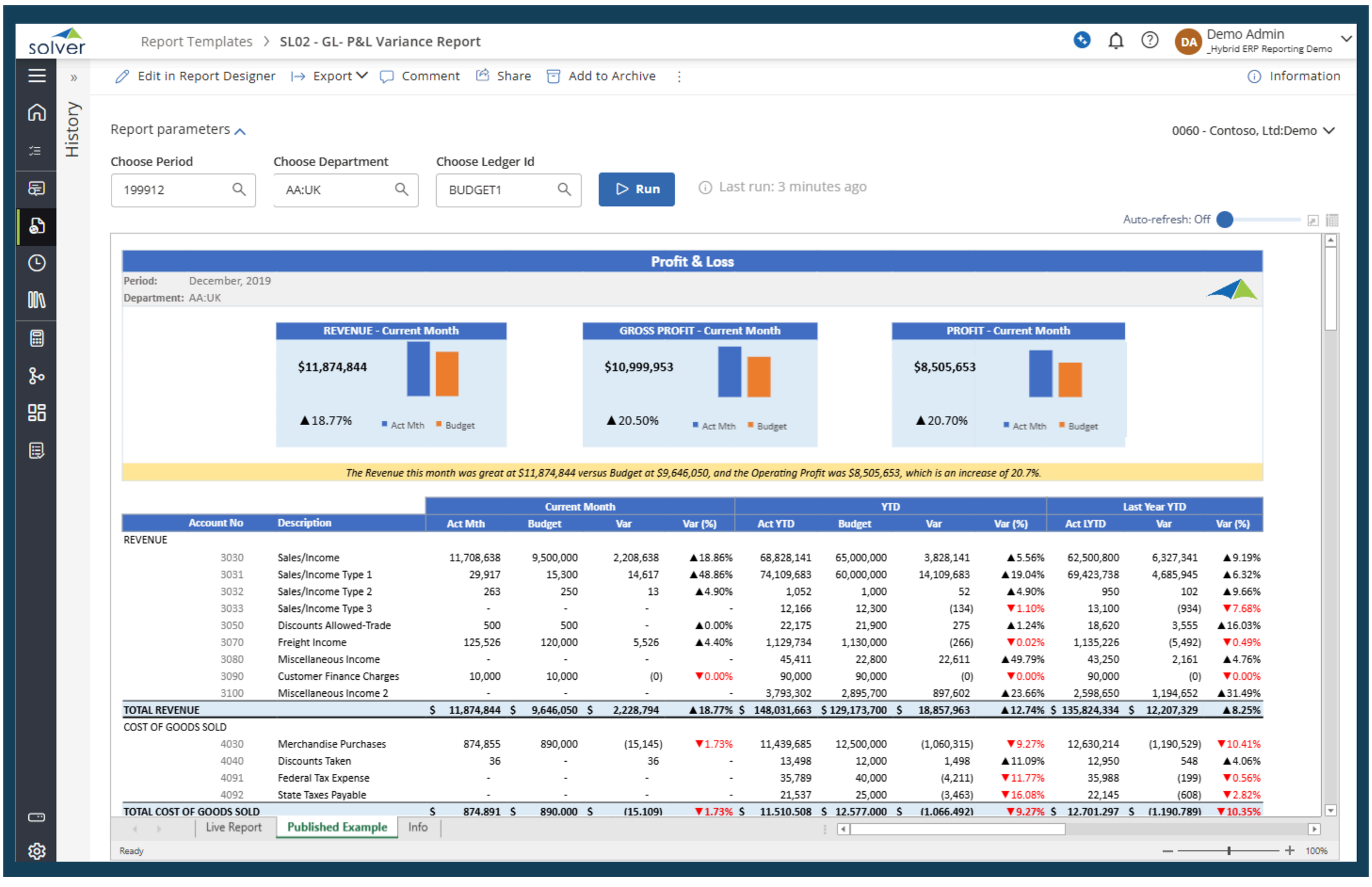
Next: see how the figures can support a finance conversation.

SOLVER PLANNING AND REPORTING

Explain the figures. Explore the detail.

03 Connect the report to the explanation

Solver brings financial comparisons into reports and supports drill-down to underlying data. In a demo, see how your staffing figures could be presented and which detail sits behind them.



Account No	Description	Current Month Act Mth	Current Month Budget	Current Month Var	Current Month Var (%)	YTD Act YTD	YTD Budget	YTD Var	YTD Var (%)	Last Year YTD Act LYTD	Last Year YTD Var	Last Year YTD Var (%)
REVENUE												
3030	Sales/Income	11,708,638	9,500,000	2,208,638	▲18.86%	68,828,141	65,000,000	3,828,141	▲5.56%	62,500,800	6,327,341	▲9.19%
3031	Sales/Income Type 1	29,917	15,300	14,617	▲48.86%	74,109,683	60,000,000	14,109,683	▲19.04%	69,423,738	4,685,945	▲6.32%
3032	Sales/Income Type 2	263	250	13	▲4.90%	1,052	1,000	52	▲4.90%	950	102	▲9.66%
3033	Sales/Income Type 3	-	-	-	-	12,166	12,300	(134)	▼1.10%	13,100	(934)	▼7.68%
3050	Discounts Allowed-Trade	500	500	-	▲0.00%	22,175	21,900	275	▲1.24%	18,620	3,555	▲16.03%
3070	Freight Income	125,526	120,000	5,526	▲4.40%	1,129,734	1,130,000	(266)	▼0.02%	1,135,226	(5,492)	▼0.49%
3080	Miscellaneous Income	-	-	-	-	45,411	22,800	22,611	▲49.79%	43,250	2,161	▲4.76%
3090	Customer Finance Charges	10,000	10,000	(0)	▼0.00%	90,000	90,000	(0)	▼0.00%	90,000	(0)	▼0.00%
3100	Miscellaneous Income 2	-	-	-	-	3,793,302	2,895,700	897,602	▲23.66%	2,598,650	1,194,652	▲31.49%
TOTAL REVENUE		**$ 11,874,844**	**$ 9,646,050**	**$ 2,228,794**	**▲18.77%**	**$ 148,031,663**	**$ 129,173,700**	**$ 18,857,963**	**▲12.74%**	**$ 135,824,334**	**$ 12,207,329**	**▲8.25%**
COST OF GOODS SOLD												
4030	Merchandise Purchases	874,855	890,000	(15,145)	▼1.73%	11,439,685	12,500,000	(1,060,315)	▼9.27%	12,630,214	(1,190,529)	▼10.41%
4040	Discounts Taken	36	-	36	-	13,498	12,000	1,498	▲11.09%	12,950	548	▲4.06%
4091	Federal Tax Expense	-	-	-	-	35,789	40,000	(4,211)	▼11.77%	35,988	(199)	▼0.56%
4092	State Taxes Payable	-	-	-	-	21,537	25,000	(3,463)	▼16.08%	22,145	(608)	▼2.82%
TOTAL COST OF GOODS SOLD		**$ 874,891**	**$ 890,000**	**$ (15,109)**	**▼1.73%**	**$ 11,510,508**	**$ 12,577,000**	**$ (1,066,492)**	**▼9.27%**	**$ 12,701,297**	**$ (1,190,789)**	**▼10.35%**

Official P&L variance-report example: actuals compared with budget.

Source: Solver Global reporting | P&L Variance Report template

Bring a forecasting example to your Solver demo.

We'll show how Solver could support your planning and reporting requirements, configured around your team.

Screenshots use Solver Global sample data. They do not calculate the hiring example.