



# Better Data and Better Budgeting with Solver & Business Central

The Philadelphia Convention and Visitors Bureau (PHLCVB) helps drive tourism and economic growth by marketing Philadelphia as a destination for conventions, meetings, and large group events.

As PHLCVB grew, they needed a more connected and flexible accounting software for nonprofits that could integrate with multiple platforms, simplify reporting, and give staff better financial visibility.

## Manual Budget Management

Operating with a zero-based budget meant teams needed accurate, up-to-date information. However, reports were often a manual, time-consuming process that placed heavy reliance on the finance team. PHLCVB wanted to empower department leaders to take more ownership of their budgets.

Jackie Santiago, Finance Manager, described, “They were definitely more dependent on us giving them the exact answer versus them seeking out the data themselves and identifying the data, their pain points, and their goals themselves.” Without easy access to real-time reporting, future planning and decision-making was difficult across departments.

## When Systems Don't Talk to Each Other

Data manipulation and disconnected processes created report inaccuracy and inconsistency. Frequent corrections to spreadsheets also reduced confidence.

Arthur Ayres, CFO, explains, “When I first got here, everything was being done in Excel.

“From that, we went to another platform, but it didn't link to Business Central so we still had to do flat file transfers. We could not get real-time information and it was only updated once a month. We were getting there with a patchwork of solutions.”

PHLCVB needed an integrated accounting software for nonprofits that could reduce manual intervention, improve reliability, and provide trusted reporting for staff. “When you’re in a situation where you frequently have to return to the stakeholder and say, ‘Hey, sorry, that report was wrong, we updated it,’ it erodes confidence,” admits Ayres.



“It really does enhance the visibility and transparency to anyone who’s running reports or even doing their budgeting. Solver takes us to the next level. I can’t say enough about how impactful that has been for my life.”

Arthur Ayres  
CFO  
**PHLCVB**  
Philadelphia Convention  
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## The Right Solution

Ayres envisioned what their system should look like, then went looking specifically for accounting software for nonprofits. Ayres shares, “When we decided Business Central was the direction we wanted to go, I started searching for a company to help with the implementation. That led to local companies familiar with Business Central reaching out to us, and we landed on Intellitec.”

Business Central provided the foundation PHLCVB needed to modernize operations along with features important to nonprofits.

Santiago states, “It is very flexible and can interchange with these different platforms to achieve what we’re looking for. We liked that it was similar to Great Plains, but with the Microsoft platform, it integrates well when we are trying to coordinate different flows into our other financial systems.”

## More Than an Implementation Partner

Working with Intellitec immediately felt like the perfect fit. “It felt like members from Intellitec were part of our staff,” notes Santiago. As PHLCVB continued expanding and refining its financial systems, Intellitec remained a trusted resource for guidance, communication, and long-term support.

She continues, “Intellitec is just a lot more informative. They’re proactive with their information. They’ll also talk you through how this flows down into your day-to-day.” This allowed PHLCVB to make informed decisions and understand possible ripple effects on workflows across the organization.

## A More Connected Approach

As PHLCVB expanded, maintaining reliable connectivity between platforms became



critical. With Intellitec's help, they connected multiple systems across the organization, improving workflows while significantly reducing manual work. "We connected programs like Concur, the budgeting platform Solver, and our CRM, SimpleView, and they all required a connector or touchpoint with Business Central. Intellitec helped us facilitate all those conversations and made sure the coordination worked well," states Santiago.

Ayres adds, "Intellitec helped with the implementation, and any product tied to Business Central since then has been with Intellitec, working hand-in-hand on development and connectivity." For example, with both Concur and SimpleView, the integration was not as straightforward as the publisher initially stated and the Intellitec team was quick to jump in and make sure it was set up exactly as the PHLCVB needed.

What was a heavily manual, disconnected process has become faster and more reliable with Intellitec's expertise.

## Improved Reporting & Financial Oversight

PHLCVB also modernized stakeholder reporting using Power BI and connected data from Business Central. Ayres explains, "When I got here, the reporting to the board was essentially a snip of an Excel sheet."

Connecting the data between the two systems created more polished, insightful, and easy-to-understand reports for leadership and the board, with Ayres saying, "I'm really, really impressed by what I've been able to do with Business Central." By improving data integrity, the team has been able to elevate the level of sophistication and simplicity in board reports.



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## Budgeting Time Cut in Half with Solver

To support the budgeting, reporting, and forecasting needs, Intellitec also recommended and implemented Solver, which integrates directly with Business Central accounting software for nonprofits. Combined with Power BI, Solver gave PHLCVB finance leaders greater visibility into budget-to-actual performance and access to timely, reliable insights without relying heavily on manual spreadsheet processes.

Ayres describes, "They can now go into Solver, see their data, parse the data, highlight questions, and drill down if they want to see actual transactions. There are multiple places where you can see your support, see your transactions, and see the origination of it, and then in the reports, you see what it all rolls up to be."



“As I report to the leadership team, report to the CEO, and report to the board, what it’s allowed me to do is use other Microsoft apps - Power BI, PowerApps - as I write other reporting to present data in ways that are attractive, easy to understand, and reliable to those that I report to. It really does enhance the visibility and transparency to anyone who’s running reports or even doing their budgeting,” continues Ayres. “Solver takes us to the next level. I can’t say enough about how impactful that has been for my life.”

Alongside easier processes & better insight, the move away from manual spreadsheets and disconnected processes has created significant time savings. “During budget season, and even on a day-to-day basis, it’s really about the speed of access, reliability of the data, and functionality, and I would say that has probably cut our budgeting time in half, at a minimum,” says Ayres.

Budgeting transformed into a more collaborative experience for everyone. Santiago says, “It’s saved us at least a good 40 to 80 hours in our budget planning cycles. Now at least they can see that the information’s dynamic. They can see that the information is updating in real time.”

## Empowering Staff with Real-Time Data

With real-time reporting and connected budgeting tools, department leaders can now have more strategic conversations rather than spending time creating reports and answering questions.

Santiago describes, “We have a good handful of team members that can drive the reporting themselves, and they now proactively come to me when they see something wrong.”



“It’s never been a point where we have not been able to achieve anything that I’ve dreamt of.”

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“We’re reducing the amount of error and questions, and then also empowering our staff. Now I enjoy the questions, ‘Hi, can we discuss how we got to this number?’ versus them waiting for us to tell them what their numbers are,” continues Santiago.

## Where Continuous Improvement Took Shape

Intellitec helped strengthen internal financial controls by working with staff to improve workflows within Business Central. Ayres explained, “The team has brought some things to my attention from the operations side. For example, we have recurring journal entries, and they identified a gap that they aren’t being reviewed. So, they worked with Intellitec to create a space where reviews can happen within that process.”

Beyond traditional reporting, Intellitec created ways to organize and analyze demographic data. Santiago explains, “We have financial data, but we also have demographic data that we may need from time to time. It’s helpful to work with Intellitec when we have to create reports based on demographic data. They’re helpful with that journey as well.”

## A Trusted Partner After Go-Live

From project management and system integrations to ongoing support and troubleshooting, Intellitec has worked closely with PHLCVB. Across all these different opportunities, they've worked with us on multiple projects," states Santiago. Ayres agrees, adding, "The project management. It's really top-notch, from inception to testing to completion. We have had really good experiences in everything that we've used them for."



"As far as a partner in terms of onboarding, troubleshooting, project management, and continued support, I have yet to see a partner function at the level that they've been able to function with us."

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That ongoing partnership also includes proactive communication around Microsoft updates and system changes, with Intellitec scheduling Zoom meetings twice a year to walk the team through any changes. "That's extremely helpful," states Santiago. "That's critical to make sure everything keeps moving along, business as usual."

## Dreams Do Come True

PHLCVB values Intellitec's quick, technical expertise. "When we have questions, they've always been responsive. We've had situations where they, on our behalf, had to reach out to Microsoft, but we've always gotten a response back and have been able to pinpoint what the issue is and how we can move forward," says Santiago.

Ayres added, "It's never been a point where we have not been able to achieve anything that I've dreamt of."

The team has also started exploring the Microsoft Business Central AI tools available.

"We're just dipping our toes into the AI environment. We use the built-in AI features for Concur. We use the built-in AI features, and we've built an internal AI chatbot for the CVB," shares Ayres. With Intellitec, the team is well-positioned to expand AI opportunities.

## Looking Ahead

PHLCVB has a partner who understands their business, supports their goals, and helps turn ideas into practical solutions.

Ayres concludes, "As far as a partner in terms of onboarding, troubleshooting, project management, and continued support, I have yet to see a partner function at the level that they've been able to function with us."