

# Phocas. +

## Get more reporting power and deep insights from the data in your ERP system.

Phocas delivers advanced **business planning and analytics** across your organisation. It's your data, your way, not ours! With our new **out-of-the-box standard integration** built for non-technical users, you can easily get data in seconds on sales, inventory, forecasts, prices, profit margins, people and budgets. Get complete flexibility and independence with dynamic reporting and dashboarding. Connect with your colleagues and securely collaborate across budgeting and planning. Keep a pulse on your business so you can meet your goals.

## Phocas business planning and analytics solutions for your ERP

Leverage your ERP data to improve reporting, analytics and planning capabilities

### Business Planning & Analytics

#### Business Intelligence

#### Analytics

#### Financial reporting

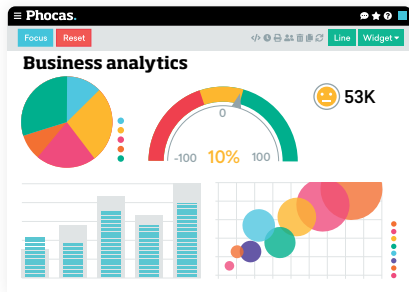
#### Budgeting and Forecasting

#### Planning

#### Rebates

*payable/receivable or both*

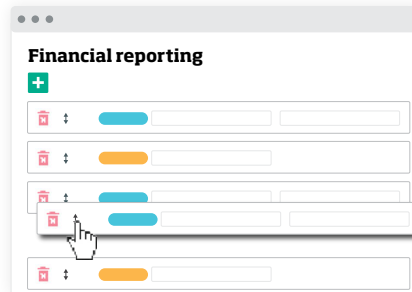
#### + Customised solutions



1

### Analytics

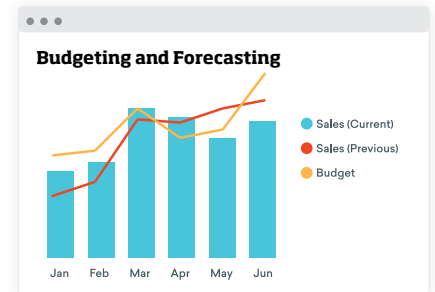
- Dashboards give the full picture
- Customer scorecards enrich conversations
- Improve individual or team performance with live tracking
- Chart or graph findings and share
- Designed to fit your industry and typical role-based KPIs
- Share datasets, views, reports and findings with others based on your access rules



2

### Financial Statements

- Consolidate multiple general ledgers
- Integrate different data streams to measure performance
- Accelerate month-end close
- Drill down into transactional data
- Easily view cash & profit loss
- Customize financial statements for your audience
- Easily automate and share reports with colleagues



3

### Budgeting and Forecasting

- Driver-based budgeting and non-financial budgeting
- Secure collaboration through workflows
- Audit any changes made
- Easily clone your budgets to re-forecast and simulate various models
- Single source of truth for your organization

\*Functions may vary depending upon functionality of ERP application.







# You've got data. Seamlessly incorporate best of breed data analytics with your ERP - even tie in other data sources, and get results.



**"We love Phocas.** When anyone asks us for information, my first thought is, 'can I use Phocas for that query?' Any opportunity to use Phocas, we do!"

**Eddie Garcia**, finance manager, AMARCO Enterprises (distributor of DMK products)

## Standard integration for success

-  Sales
-  Purchasing
-  Inventory
-  A/R
-  A/P
-  General Ledger  
**NEW** Financial Statements feature

## Optional databases

-  Transfers
-  CRM
-  Rebates **IMPROVED**  
*analyze, manage and report on all your payable or receivable rebates*

## ROI Stats

# 7.5%

Reduction in inventory holding costs

# 40%

Increase in sales via new opportunities

# 70%

Decrease in report requests to IT

# 300%

Increase in reporting speed



### Capterra Shortlist

Top-ranked BI, dashboard and statistical analysis software



### FrontRunners

Top-ranked BI, dashboard and reporting software



### GetApp

A valuable product of 2020



### G2 Crowd

Leader Fall 2021



### Capterra Top 20

4.8/5 software review rating