

Get to know the Phocas products.

Phocas Analytics

**Phocas
Financial
Statements**



**Phocas
CRM**



**Phocas
Budgeting
and Forecasting**



**Phocas
Rebates**



Who is Phocas software designed for?

Distributors, manufacturers and retailers who want to use data to increase the value of their business.

Our purpose:

Phocas makes people feel good about data.

Phocas Analytics

Turn your data into insights for smarter decisions

A cloud-based data analytics solution designed for the everyday user. Phocas Analytics delivers a powerful analytical capability that summarizes and visualizes complex information. Building dashboards and scorecards is straightforward but what sets Phocas Analytics apart is its ad-hoc analysis layer - the Grid. Unlike other tools, people can move from the Phocas dashboard to underlying business data transactions. The user decides how much detail to see and in what format.

Top 3 benefits:

- 1 Simple, self-service design so anyone can perform in-depth data analysis
- 2 Easy customization to suit your business needs
- 3 Reliable integration with all major ERP/ CRM systems plus other data sources and accessible from desktop or mobile interfaces

Phocas.

Phocas Financial Statements

Financial reporting and analysis to eliminate static spreadsheets

Allows your finance team to share financial performance information across the business so people can manage their area's expenses and financial KPIs proactively. Data from your ERP is fed directly into Phocas Financial Statements, leaving the ERP data intact to ensure ledger data integrity. Financial statements (profit & loss, balance sheet and cashflows) can be customized.

Top 3 benefits:

- 1 Time savings for finance: fast and easy monthly reporting, consolidations, comparisons, customizations
- 2 Reduce maintenance and rework of static spreadsheets
- 3 Discrepancies between teams resolve faster with a single source of truth

Phocas Budgeting and Forecasting

Modern approach to budgeting and forecasting

A dynamic and user-friendly financial budget planning and forecasting solution. Keep track of budget plans in the cloud, from anywhere, at any time. A workflow-driven approach allows multiple stakeholders to collaborate securely in real-time for accurate budgets. Interactive forecasting capabilities allow business leaders to re-forecast estimates easily during the budget period or prepare a rolling forecast to keep pace with market conditions.

Top 3 benefits:

- 1 Familiarity of Excel (look & feel) but with data integrity and peace of mind
- 2 Detailed driver-based planning
- 3 Modelling with multiple scenarios

Phocas Rebates

Analyze margins and performance to ensure you're never losing out

Businesses that rely on tight product margins and operate in multi-tiered supply chains use Phocas Rebates for enhanced discount and commission management. Phocas Rebates allows commercial and finance teams to bring order to rebate rules, with everything visible in the one place, from one source of data.

Top 3 benefits:

- 1 Phocas Rebates complements the Phocas Analytics data analytics solution
- 2 Negotiate better rebate contracts
- 3 Save administration time by quickly creating supporting documents for rebate claims right down to the transaction level

Phocas CRM

Unlock new opportunities by understanding your customers better

Phocas CRM is a simple customer relationship management system that integrates with Phocas Analytics. When your CRM data interlocks with actual sales information in Phocas, you can see, track and analyze opportunities and risks, helping you turn analysis into action.

Top 3 benefits:

- 1 Access Phocas CRM anywhere, from your web browser using any device
- 2 Deliver great customer service by getting a holistic view of your customer
- 3 Find new opportunities by combining with data analytics