

# PUG.news UK

## 1. The latest product news

### 1 Improvement to dashboard grid widgets

Users can now hide the search box on widgets where it isn't required saving valuable dashboard space. For instance: where only a small number of records are displayed. This is accessed via 'edit widget'

Hide Search Box

Yes

Hide Search Box: No

Code	Name	Total LocalValue £	Nov 2017	Dec 2017	Jan 2018
<b>TOTAL</b>		<b>28,867,063.30</b>	<b>4,848,022.25</b>	<b>4,641,031.06</b>	<b>5,922,822.53</b>
1	108 Rick Toepfer	2,411,671.85	298,677.68	362,180.53	555,614.94
2	208 Shelley Gilbert	2,034,419.05	343,552.11	298,677.68	362,180.53
3	308 Judy Kelley	1,813,915.29	436,182.48	343,552.11	298,677.68
4	137 Stephen Montgomerie	1,702,094.48	198,604.68	288,698.76	356,081.17
5	119 Adkins	1,507,609.71	184,076.10	292,580.66	362,545.43
6	237 Jimmie Waters	1,369,066.51	205,119.17	198,604.68	288,698.76
7	910 Bethany Crane	1,298,847.01	222,446.68	184,076.10	292,580.66

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### 2 Enhanced Stream Mode

Users can now display multiple streams side by side in a single view. Users can also add 'variance' columns to this view.

### 3 My Agenda (CRM)

This feature shows users a 7-day view ahead of all meetings and tasks. This includes: overdue activities, all day activities and personal appointments. This all helps to keep your CRM up to date.

## 4 Email notification: CRM My Agenda

After feedback from our customers, CRM users can now have their agenda delivered to their inbox, showing meetings and activities for today and tomorrow, as well as any overdue activities.

Settings Save

**Profile Picture**  
TL

**Username**  
Tim.leonard

**Name \***  
Tim Leonard

**Email \***  
tim.leonard@phocassoftware.com

**Show splash screen**  
No

**Phone**

**Mobile**

**Browser**  
Safari (11.1)

**Phocas Version**  
7.4.5.1

**Language**  
English (United Kingdom) (en-GB)

**Timezone \***  
Europe/London

**Email Notifications**

- My Activity and Meeting Invitations
- My Agenda at:  
17:00

### And there's more...

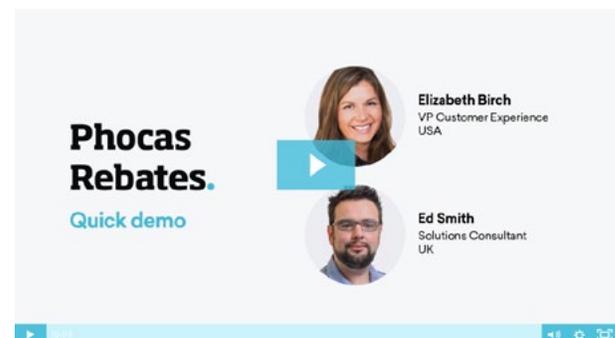
To keep up to date, please visit our [Phocas Release Notes Page](#)

## 2. What's new with Phocas Rebates?

**“Near miss” is a new enhancement available in Phocas Rebates that provides an indication of which rebate bracket was reached or how far away a higher level of rebate is.**

This allows people who care about rebates to keep an eye on targets and take a course of action to meet them. “Near miss”, along with other features of the solution, offers you a simple overview of rebates status while preparing the data for ease of analysis in Phocas.

Find out more about Phocas Rebate in the video below



If you would like a **30-min personalised demo** with our Customer Experience Team, please [click here](#) to schedule a demo.

### 3. PUG.training

#### Did you know that we do free online training webinars?

Series one of the PUG training series began in September. This series surrounded the theme of back to basics and is targeted towards anybody who is new to Phocas, looking for a refresher course or wanting to expand your skills.

If you missed the training, [click here](#) to watch the webinar recordings.

**Series two will be targeted towards those of you who are Phocas power users. This series commences on the 17th January with Combining Streams, you will learn how to:**

- Analyse what you are buying, holding and selling to manage inventory
- Easily share information between departments
- Set alerts – see issues before they get out of control

Click [here](#) to register for the free online training sessions



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### 4. Save the date!

The 2019 PUG Live user conference will be held at the Marriott Hotel in Leicester on the 11th June 2019.

Watch your email for more details!



## 5. Meet the Customer Experience Team

**The Customer Experience Team (CET) is responsible for making you, our clients, love Phocas.**

Whether you have questions on how to operate Phocas, a need for more user licenses, or you want to investigate the possibility of adding more databases to your environment, look to our customer experience team to point you in the right direction.



- 1 **Jessica Brown** (Customer Success Lead)
- 2 **Stewart Wood** (Customer Success Consultant)
- 3 **Sarah Smith** (Customer Success Consultant)
- 4 **Jonathan Notman** (Customer Success Consultant)
- 5 **Jason Bradshaw** (Customer Success Consultant)

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## 6. Is your Phocas environment ready for 2019?

**As this year comes to a close, please ensure your Phocas environment is ready to go immediately following the New Year holiday.**

All you need to do is follow a few simple steps outlined in our [year-end maintenance tips](#) to make the transition as smooth as possible.

Name	Type	Period
1 Rolling 12 Months	Month	Feb 2016 to Jan 2017 (Feb 2015 to Jan 2016)
2 TY Rolling 12	Month	Feb 2016 to Jan 2017 (Feb 2015 to Jan 2016)
3 LY Rolling 12	Month	Feb 2015 to Jan 2016 (Feb 2014 to Jan 2015)
4 Current Month	Month	Jan 2017 (Dec 2016)
5 Last Month	Month	Dec 2016 (Nov 2016)
6 Last 3 Months (Full)	Month	Oct 2016 to Dec 2016 (Jul 2016 to Sep 2016)
7 Calendar Year to Date	Month	Jan 2016 to Jan 2017 (Jan 2015 to Jan 2016)

## 7. Looking ahead with your data in the new year

**Thank you for your continued support and use of Phocas in your business, we truly enjoy working with you.**

Our UK offices are closed from the 24th December 2018 to 1st January 2019 - reopening on Wednesday, 2nd January.

If you require urgent support over this period, please email [support\\_uk@phocassoftware.com](mailto:support_uk@phocassoftware.com) or call [+44 1865 364 103](tel:+441865364103)

**Best wishes from all of us for a great new year filled with health, happiness and getting ahead with your data with Phocas in 2019.**

