PUG.news^{UK}

Phocas.
Got data. Get results.

1. Phocas Support vs. Services: who do I call?

Our customers tell us that getting a strong ROI on their Phocas investment is important, that's why we are always on standby to meet your needs.

Do you have a question about how to use Phocas? Are you troubleshooting an issue? Our Support and Services teams can answer these questions and more.
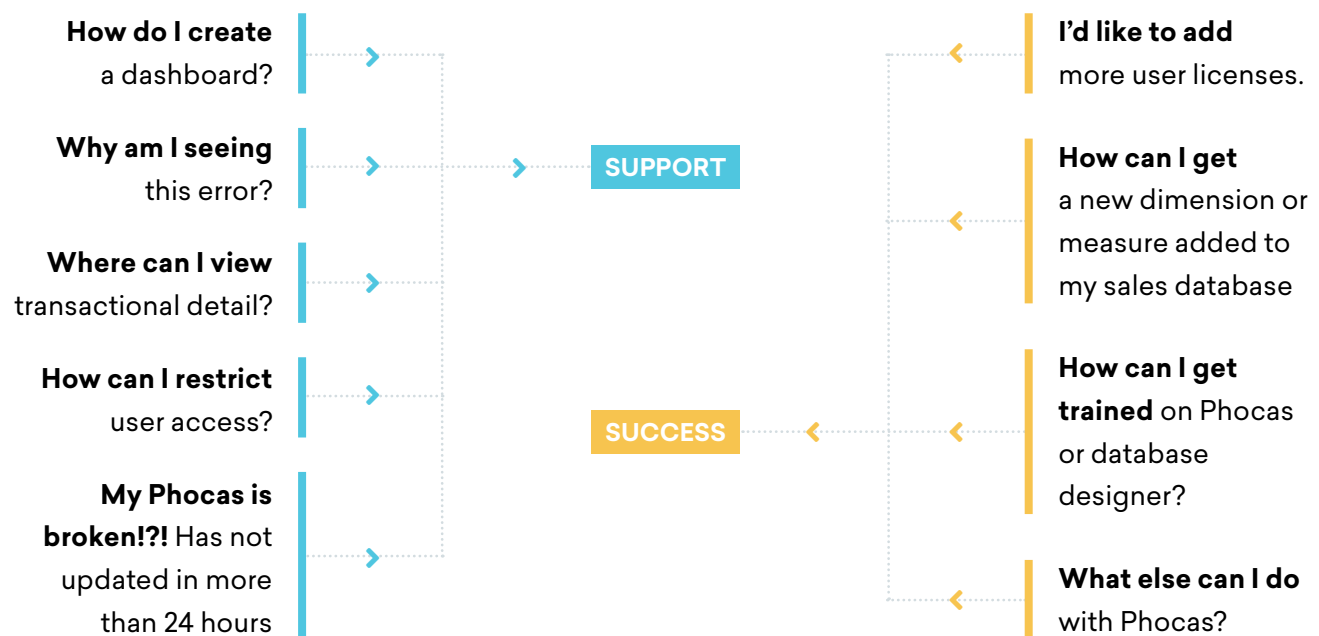
Here's a quick guide to help you know who to call:

① Support

For any emergencies related to Phocas (e.g., Phocas isn't working correctly, you are receiving error messages, Phocas has not updated in more than 24 hours) or specific questions on how our data analytics solution works, please **contact our Support Team**.

② Services

For all matters related to services (e.g., making edits or additions to your Phocas environment), please **contact our Customer Success Team**.

How do I create a dashboard?		**I'd like to add** more user licenses.
Why am I seeing this error?	**SUPPORT**	**How can I get** a new dimension or measure added to my sales database
Where can I view transactional detail?		
How can I restrict user access?	**SUCCESS**	**How can I get trained** on Phocas or database designer?
My Phocas is broken!?! Has not updated in more than 24 hours		**What else can I do** with Phocas?

2. Meet the Customer Support team

Customer Support

1. **Lee Konrath** (Support Lead)
2. **Jonathan Williams** (Support Analyst)
3. **Arun Sodhi** (Support Analyst)
4. **Paul Okunola** (Support Analyst)
5. **Ray Charlton** (Support Analyst)
6. **Steven Stacey** (Support Analyst)

3. The latest product news

At Phocas, we've been working hard to find ways to enhance and improve your BI experience – which is why we're excited to announce more product updates.

1 Updates to our CRM

After much feedback from our customers, we are beginning to update and upgrade our Phocas CRM product, beginning with setting restrictions in a similar fashion to Phocas restrictions via simple rules. Restrictions are set based on the owner of the parent account or lead and are not set based on the owner of contacts or activities.

2 Pareto Chart

Pareto is often referred to as the "80/20 rule," and this is what this chart demonstrates.
It is a regular column chart (blue) with a pareto line over the top (red) representing cumulative percentages.

*Please note: Pareto charts are only available in Total mode.*
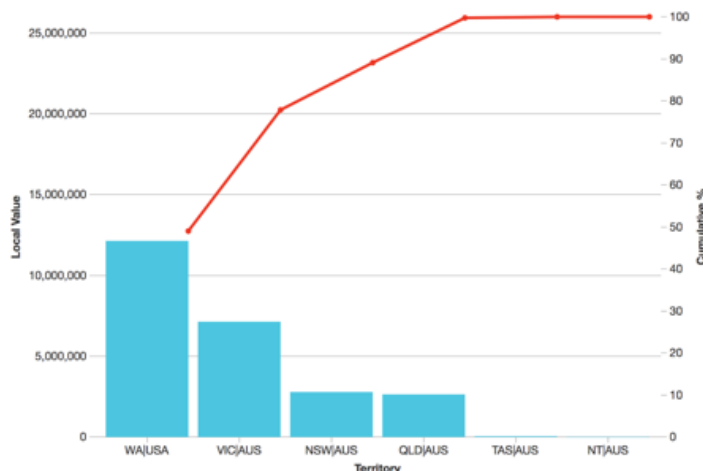
③ Authenticated embed URL

Every favourite and dashboard is now available as an "embed" view, meaning the favourite or dashboard will open up in a new tab or window as view-only. Users will only be able to see the embed view if they can see the original dashboard or favourite in Phocas, meaning they need to be authenticated (i.e., signed in or using SSO/SAML).

This new feature will allow you to embed URLs into places such as presentations, websites and intranets. You will also get a live favourite or dashboard that updates.

④ Consistent chart colours

A small but worthwhile improvement that has been requested by many customers. If the same entity, for instance a particular product group, appears across multiple widgets, it will be displayed in the same colour.
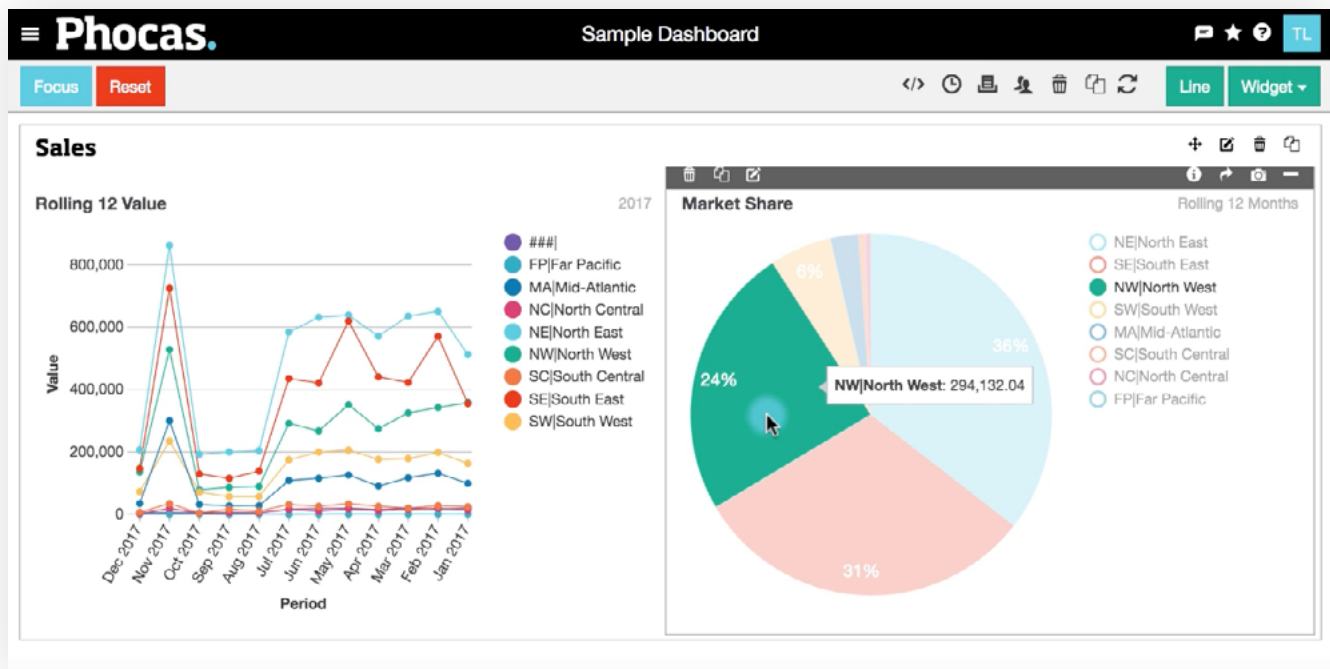
⑤ Admin – set a database owner

For administrators, we have introduced the ability to prevent unwanted changes to a database design, by setting a 'database' owner'. Only the 'owner' can edit a database design. You can still choose to leave the owner blank so that other administrators can make changes, giving you flexibility either way.

6 Drag-and-drop on tablets and mobile devices

The drag-and-drop feature is now enabled on tablets and smartphones. This includes:

- Create and edit your dashboards/widgets
- Create and edit new databases in Designer
- Configure grid-nesting

And there's more...

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

---

4. PUG training

Did you know that we do free online training webinars?

The new PUG training series began in September. This series surrounds the theme of back to basics and is targeted towards anybody who is new to Phocas, looking for a refresher course or want to expand their skills.

The next session will be on Phocas Advanced on the 18th October, you will learn how to:

- easily identify gaps and opportunities across your customer channels
- measure performance against key metrics
- build targeted customer lists
- create graphs and charts that represent key business levels

Also look out for the session on Dashboards on the 15th November.

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

5. PUG Forum

Join the PUG Forum

The Phocas User Group Forum enables current customers, people curious about Phocas, and Phocas staff to communicate and exchange ideas with each other, ask questions, and share cool ways to use Phocas.

pug.phocassoftware.com

---

6. Phocas customers continue to grow their businesses with data

> "The combination of having a useful and accurate set of data in front of you that you can analyse with point and click is incredibly user-friendly."
>
> Michele Laybourn - Morelli

Morelli Group switches gears and leads the pack with Phocas

Phocas has become an integral part of the automotive supplier's business, integrating seamlessly with its MAM ERP and warehouse management system.

> "I sometimes wonder how companies that don't have Phocas manage to run their business."
>
> Daniel Davis - J&S Davis

J&S Davis takes data analytics to the next level with Phocas

Phocas allows J&S Davis to drill down into the data to find unexpected and exciting discoveries about products, places and people.

---

7. Chairman's statement

PAUL MAGEE

Co-founder, chairman Phocas Group

It's been another productive year at Phocas during the 2017/2018 financial year.

Read our chairman, Paul Magee's statement to find out more.

Phocas 20-20 House, Middlemarch Business Park, Siskin Drive, Coventry, CV3 4FJ

Customer support: support_uk@phocassoftware.com | +44 1865 364 103

Phocas.