

DECEMBER 2018

Phocas.
Got data. Get results.

PUG.news^{US}

1. Happy holidays from our Phamily to yours

As we wrap up 2018, we'd like to thank you for being a Phocas customer.

This will be our last newsletter of the year to share the latest Phocas features, company news and – most importantly – it gives us a chance to wish you a happy and safe holiday season!



2. Thank you for making PUG.live 2018 a success

A huge thank you to our valued customers who joined us in Dallas, Texas for another successful PUG.live event.

This year's three-day conference was packed with networking opportunities, education sessions – and, of course, fun – all designed to help you continue making the most out of your investment with Phocas.



Hear firsthand from some of this year's attendees:



“This conference has identified many items within Phocas I had no idea was available.”

“PUG.live gave me the guidance to be more effective.”

“[Phocas employees] are very supportive and anxious to help us be successful with the product.”

We hope to see you at next year's event!

3. PUG.training 2019: register now to save your spot

PUG.training, our customer online training series, will have a new look and feel for 2019 complete with our ever-popular training sessions.

The first session of the series, Phocas Basics, will be kicking off Thursday, January 24. This series includes sessions on the following dates, all airing at 2 PM EST:

Phocas 101	Phocas Extras	Dashboards
January 24	February 24	March 21



4. 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.

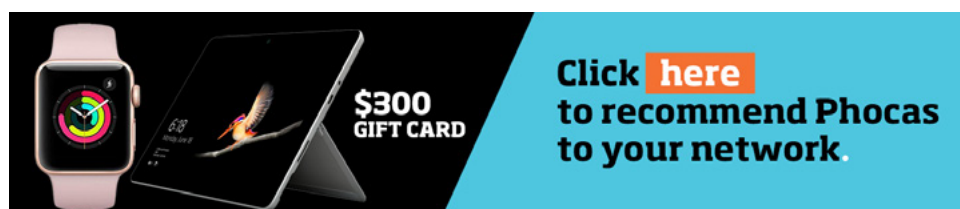
All you need to do is follow a few simple steps outlined in our [year-end maintenance tips](#) to make the transition as smooth as possible.

5. Do you love Phocas? Let us know – and be eligible to win a prize!

Word of mouth remains one of our most effective business channels – and now more than ever, we need your voice in this noisy market.

That's why we're encouraging our customers to review Phocas via G2Crowd – and you'll be eligible to receive a prize if you do!

Individuals who submit the first 10 reviews will be entered to win a prize of their choice: an Apple watch, a Microsoft Surface Go, or a \$300 gift card. There will be three chances to win!



6. Introducing the “Near miss” Rebates feature

“Near miss” is a new enhancement in Phocas Rebates that provides a clear indication of which rebates are close to their next target – helping you prioritize spending or guiding customers to meet these goals. This, along with other features of the solution, helps our customers avoid missing the next rebate threshold and provides them with a simple overview of rebates status, while preparing the data for ease of analysis in Phocas.

With the calendar year end quickly approaching, it’s the perfect time to [ask your Account Manager or a Phocas Solutions Consultant](#) about Phocas Rebates and the benefits it can have on your margins.

7. Product enhancements: Phocas release 7.4.2 – 7.4.4

1 Consistent chart colors

If the same entity appears on a dashboard in more than one place, it will now display in the same color.

2 Enhanced stream mode

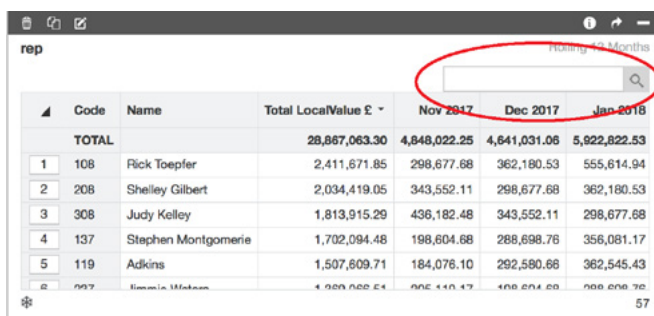
Users can now display multiple streams side by side in a single view. “Variance” columns may also be added to this view.

3 Updated gauge chart

The gauge chart in Phocas has been updated, now allowing users to include more data.

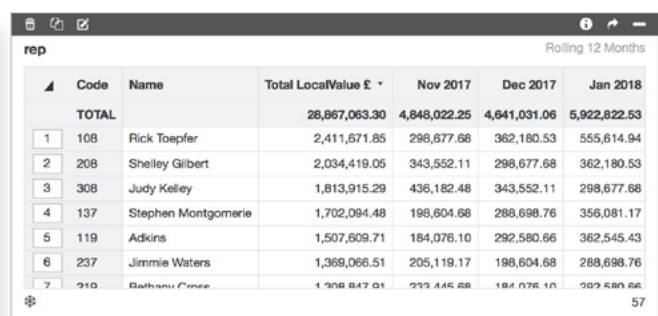
4 Improvement of dashboards

Due to popular request, users can now hide the search box on widgets where it isn’t required (e.g., where only a small number of records are displayed), saving valuable dashboard real estate. This functionality can be accessed via “edit widget.”



The screenshot shows a dashboard titled 'rep' with a 'Rolling 12 Months' filter. A search box is circled in red. Below it is a table with columns: Code, Name, Total Local Value £, Nov 2017, Dec 2017, and Jan 2018. The table lists several entities and a total row.

	Code	Name	Total Local Value £	Nov 2017	Dec 2017	Jan 2018
TOTAL			28,867,063.30	4,848,022.25	4,641,031.06	5,922,822.53
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	210	Bathany Cross	1,208,847.01	233,445.68	184,076.10	202,580.66



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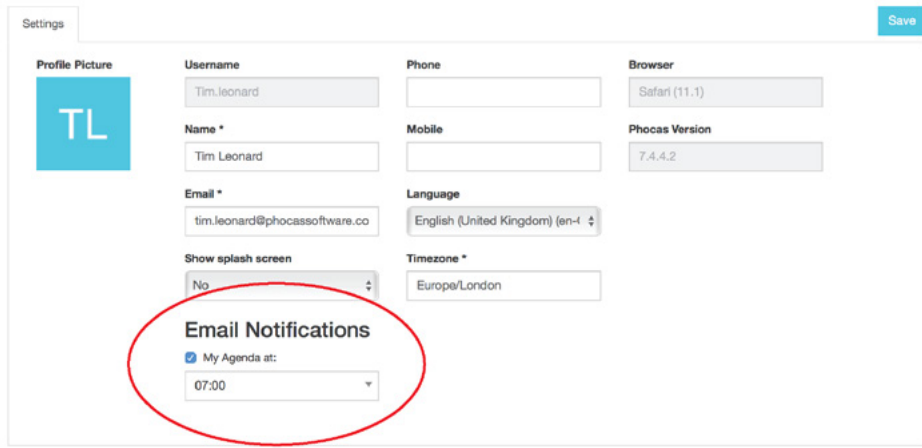
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8. Updates to Phocas CRM

1 The “Company” field has been added in the leads table in CRM

2 CRM email notifications

CRM email notifications are now available, giving you the option to receive an email when an activity has been assigned to you or when you’ve been invited to a meeting. [Watch the video](#) for a quick demonstration.

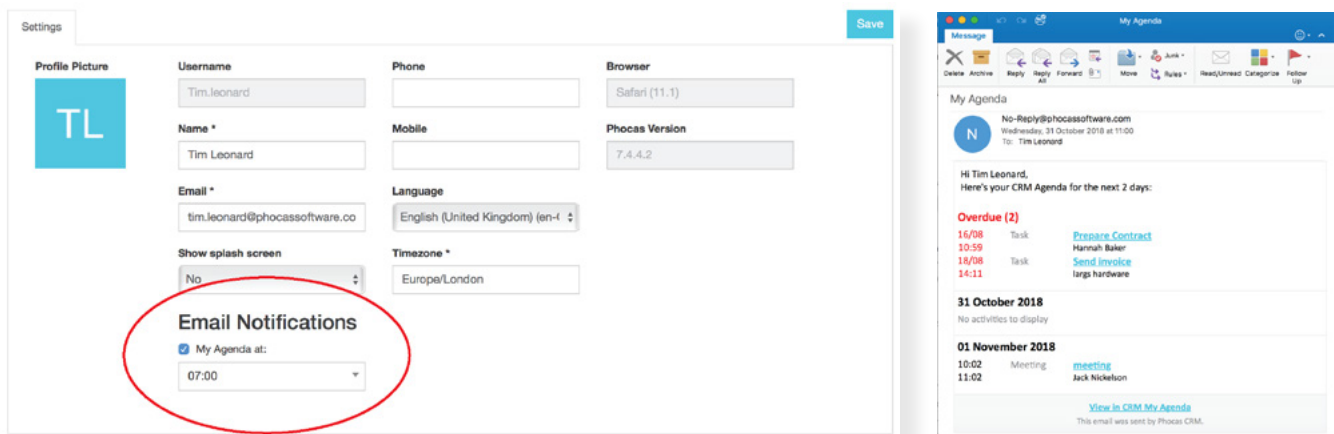


The screenshot shows the 'Settings' page in Phocas CRM. The 'Email Notifications' section is circled in red. It includes a checkbox for 'My Agenda at:' which is checked, and a dropdown menu set to '07:00'. Other settings visible include Username (Tim.leonard), Name (Tim Leonard), Email (tim.leonard@phocassoftware.co), Show splash screen (No), Language (English (United Kingdom) (en-4)), and Timezone (Europe/London).

3 “My Agenda” offers a seven-day view ahead of all meetings and tasks

4 Email notification for “My Agenda”

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. Link directly from the email to a specific activity in CRM, or to the “My Agenda” page.



The left screenshot is identical to the one above, showing the 'Settings' page with the 'Email Notifications' section circled in red. The right screenshot shows an email notification titled 'My Agenda' from 'No-Reply@phocassoftware.com'. The email content includes a greeting, a summary of the agenda for the next 2 days, and a list of overdue tasks and meetings. The overdue tasks are: '16/08 Task Prepare Contract' by Hannah Baker, '18/08 Task Send Invoice', and '14:11 largs hardware'. The meetings are: '10:02 Meeting meeting' and '11:02 Meeting Jack Nickelson'. A link to 'View in CRM My Agenda' is provided at the bottom.

For other enhancements and full details, you can [visit our release notes page](#).

9. Welcome to our new Phocas team members!



Kelli Broberg
Support



Evan Cohen
Support



Christian Koblit
Implementation

NEW POSITION



Corey Mulliken
*Customer Success (formerly
Customer Acquisition team)*

10. 2019 Tradeshows: introduce a friend to Phocas

The start of a new year brings new opportunities for Phocas to meet with our valued customers.

To date, we will be attending the following events in 2019 and hope to see you there. We'd also like to remind you that, if you stop by our booth or table with a friend who is not yet a Phocas customer, you will receive a gift from us.

The User Group (TUG)	MAR 13 - 16, 2019	Hilton & Waldorf Astoria Bonnet Creek, FL
IMARK	MAR 26 - 28, 2019	Chicago, IL
Epicor Insights	APR 15 - 18, 2019	Las Vegas, NV

Phocas.