EPICOR | Phocas.

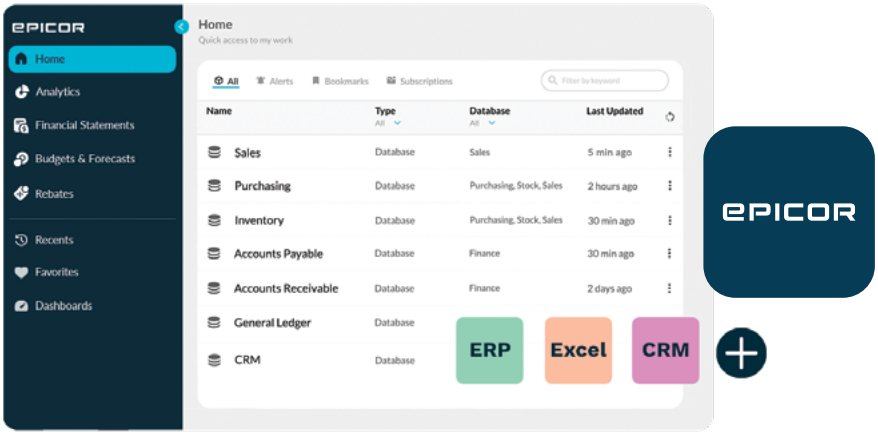
BI + Financial Planning & Analysis together

Discover how Epicor Data Analytics (EDA) powered by Phocas can unleash efficiency, increase profitability and help you get more out of your Epicor ERP data.



EDA powered by Phocas is a Business Intelligence and Financial Planning and Analysis (FP&A) platform purpose built for mid-market businesses using Epicor ERP systems. Designed to be easy-to-use by everyone, EDA products empower you to analyze data, create dynamic custom financial reports, build budgets and forecasts, and manage rebates. EDA products work together seamlessly to make it easier for you to better plan your financial future and run your business day-to-day.

We are Epicor experts, so we know exactly how to put your data to work in the ways you need - meaning your entire organization can connect, understand and plan better together. With EDA on your team, tasks are automated, insights flow on-demand, and your people can focus on doing the work that has the biggest impact on your bottom line. This is why we built our platform and it's how we make people feel good about data.



Epicor ERP + other data sources are automatically pulled into one central platform

"When you combine your business data with the speed of Phocas, you can see things absolutely instantly without somebody printing out reports and putting it all together. It's all there for you."

Director of Accounting and HR, Stokes Electric Company

A great fit for cross-platform Epicor ERPs

Works with Epicor Eclipse, Kinetic, CMS, Bistrack, Prophet 21, Lumbertrack, Eagle, Vision, E8, E9, E10, Advanced MES, Prelude, Mattec

Epicor ERP + other data sources are automatically pulled into one central platform

Up-to-date data flows across financial reports, dashboards, financial statements, budgets, forecasts, rebates

Phocas handles big data volumes while maintaining fast, reliable performance

Sensitive information is protected with employee-level data access and security

As your business grows, Epicor + Phocas covers everything you need to track performance and grow.

EDA (Epicor Data Analytics)

AI-assisted BI that delivers quick, easy access to consolidated data. Drive improvements across every aspect of your business, whether it's by branch, sales or product.

Top three benefits

- Integrates with all major ERP systems plus other data sources for easy access to data in one place
- Simple, self service design so anyone can perform in depth data analysis
- Customizable interactive dashboards + reports.

EDA Financial Statements

Easily analyze and report on the financial health of your business. ERP numbers are transformed into dynamic profit & loss, balance sheet and cash flow statements, allowing you to slice, dice and drill into transaction detail to quickly find and solve problems.

Top three benefits

- Save finance team's time: fast and easy monthly reporting, consolidations and customizations
- Customize reports & dashboards & track performance with live actuals
- Quickly drill down to transactional detail.

EDA Budgets & Forecasts

A collaborative budgeting tool that brings together planning across the whole business. Whether creating a financial budget, sales forecast, demand plan or headcount.

Top three benefits

- An Excel-like experience but with data integrity and peace of mind
- Detailed driver-based planning and robust workflows
- 3-statement modeling and live actuals for accurate reforecasting.

EDA Rebates

Boost your bottom line with win-win trade partnerships. Stay ahead of multiple payable and receivable rebates programs with automated management that delivers accurate, efficient and profitable rebates.

Top three benefits

- Understand and improve Rebates performance using real time data
- Save time and reduce errors with automated calculations
- Unlock revenue with near-miss analysis and data-driven supplier negotiation.

EDA Sales Insights

Focus sales effort on the most valuable accounts. Stop guessing which customers to prioritize and start selling smarter. Phocas Insights gives your sales team instant customer segmentation so they can target high-value accounts.

Top three benefits

- Know where to focus your effort with instant, automated account segmentation
- Get ahead of churn by spotting early warning signs before customers walk
- Find new revenue by uncovering upsell and cross-sell opportunities your team is missing.

The EDA Suite powered by Phocas is built on our intuitive BI & FP&A platform trusted by thousands of global businesses to make data-driven business decisions that drive performance.

Learn more at **www.phocassoftware.com**
US +1 877 387 4004 | UK +44 1865 364 103 | AU + 61 1300 746 227
hello@phocassoftware.com