Phocas. | **Merlin** BUSINESS SOFTWARE From Aptean

BI + FP&A together for Merlin users

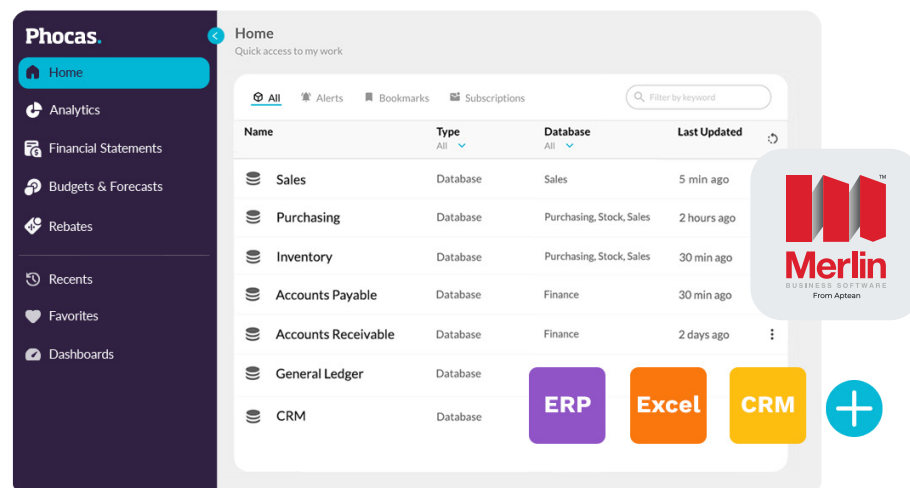Discover how Phocas can speed up reporting, increase profitability and help you get more out of your Merlin ERP data

Stock on hand
$1,453,976

Stock distribution

One central platform for smarter decisions

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

We are Merlin 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 Phocas 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.

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

> **"In addition to increasing the variety of products customers were purchasing from us, the biggest benefit of Phocas was the analysis of our margins."**

IT & Finance Director
Dayla Drinks

A great fit for Merlin ERP users

Purpose-built for industries aligned with your Merlin ERP; wholesale distribution, builders merchants, electrical, food service, plumbing & HVAC

Merlin 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, Merlin + Phocas covers everything you need to track performance and grow.

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. It's fast, secure and designed to be self-serve for everyone.

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 with sharable favorites & alerts.

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
- Interrogate financial information down to the transaction.

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 - it's designed for detailed budgeting while remaining easy to use for all contributors.

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.

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. Ensuring you get the returns and expected payouts you're aiming for.

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.

CRM

Better manage and understand which actions drive customer revenue. With customer data and live sales information flowing directly from Phocas Analytics, you can see, track and analyze opportunities and risks with all customer performance measures in one place.

TOP THREE BENEFITS

- Access Phocas CRM from any smart device
- Connect sales insights to sales activities
- One platform for sales to track performance, gain insights, plan activities, and access customer data.

Scan to get your Phocas + Merlin demo

Phocas tailors your Merlin integration to your business needs. We have a tried and tested implementation process and onboarding support, paving the way for a fast return on your investment.

Learn more at **www.phocassoftware.com/integrations/merlin**

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