Phocas.

Partner for success

Drive business growth with our all-in-one business planning and analytics platform. Help your customers unlock the full potential of their data—connecting them to the right insights, at the right time.

★★★★★
4.8/5 on Capterra

★★★★⯪
4.6/5 on G2

Sales vs Forecast

Help your customers feel good about data

Phocas helps you deliver faster insights and smarter decisions to your customers in manufacturing, distribution, retail, and construction. With over 40,000 daily users and 20+ years of ERP and industry know-how, we understand your customers—and help you grow by helping them thrive.

5 key benefits for your business

1 Deliver more value with an all-in-one BI + FP&A platform

Unlock comprehensive reporting, budgeting, forecasting, and rebate management in a single, integrated platform, helping reduce manual workarounds and collaborate effectively.

2 Boost customer growth and retention by delivering smarter insights

Foster long-term loyalty with an FP&A platform that scales to meet customer needs, transforming ERP data into actionable financial insights that drive quick wins and natural land-and-expand growth.

3 Accelerate time to value with adaptable, pre-built industry solutions

Quickly implement industry-specific solutions with pre-configured KPIs and seamless ERP integration, ensuring your customers can scale and adapt to changing business needs with minimal setup time.

4 Improve your customer experience with top-rated training and support

Equip your team and customers with comprehensive training and dedicated support to maximize value from our platform — backed by a 97% customer retention and near 5-star ratings on G2 and Capterra.

5 Drive revenue and expand reach with proven go-to-market resources

Access powerful sales and marketing resources, including co-branded campaigns and lead gen tools to fuel pipeline growth, accelerate revenue, and position you for long-term success.

A great fit for mid-market manufacturing, retail and wholesale distribution businesses

Integrates with over 200 of the world's leading systems

One central platform for management and financial reports, dashboards, financial statements, budgets, forecasts, rebates

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

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

Scales effortlessly to handle large data volumes while maintaining fast, reliable performance

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300 employees

2800 customers

40k+ active users

97% retention

Founded in 2001

Private company

Certified B Corp

Analytics

AI-assisted BI built for distributors, delivering fast, easy access to consolidated data. Drive improvements across branches, product lines, sales channels. Spot trends, identify gaps, and act quickly.

TOP THREE BENEFITS

- Integrates with all major ERPs + other data sources for a complete view of performance
- Simple, self-serve design allows anyone to drill into sales, inventory, and margin data
- Custom, interactive dashboards + reports with sharable alerts & favorites.

Financial Statements

Easily analyze and report on your business' financial health. Turn ERP numbers into dynamic profit & loss, balance sheet and cash flow statements. Slice, dice and drill into transaction detail to find and solve problems.
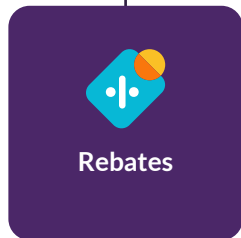
TOP THREE BENEFITS

- Fast, automated monthly reporting and consolidations
- Customize reports, dashboards, and track performance with live actuals
- Drill down to transaction-level details to pinpoint financial issues.

Budgets & Forecasts

A collaborative, flexible budgeting tool designed for wholesale distributors. Aligns financial budgets, sales forecasts, demand planning and headcount. Designed to facilitate detailed budgeting while remaining easy to use for everyone.
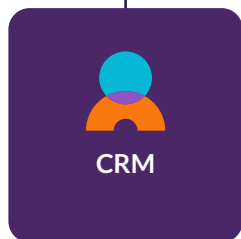
TOP THREE BENEFITS

- Familiar Excel-like interface with built-in data accuracy
- Driver-based planning; adjust for sales trends, supplier costs, seasonal shifts
- 3-statement modeling, live actuals enable ongoing tracking and accurate reforecasting

Rebates

Stay ahead of multiple payable and receivable rebate programs with an automated tool that delivers accurate, efficient, profitable rebates. Get the returns and payouts you're aiming for and build win-win trade partnerships.

TOP THREE BENEFITS

- Access real-time data to optimize rebate performance
- Automated calculations reduce errors and save time
- Use near-miss analysis to unlock revenue and inform supplier negotiations

CRM

Better manage and understand which actions drive customer revenue. Customer data + live sales information flow directly from Phocas Analytics; see, track, analyze opportunities and risks in one central place.

TOP THREE BENEFITS

- Access customer insights 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.

Seamlessly integrate with your ERP and more...

infor   ORACLE NetSuite   EPICOR   klipboard. Your Business Your Way   Microsoft   myob   Sage   SAP

Let's partner

Discover the power of partnership with Phocas. Explore how we can work together to unlock new growth opportunities and help your customers gain deeper insights from their data.

Learn more at: **www.phocassoftware.com/partners**