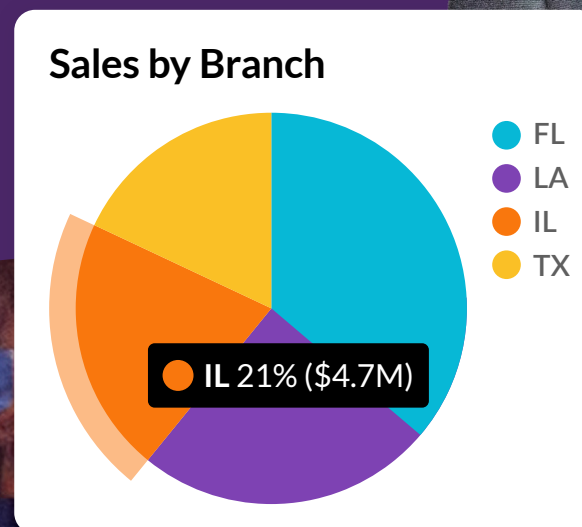


EBOOK

5 ways Infor users can **feel good** about their data

Take full advantage of what your Infor
ERP has to offer



Phocas.

infor

Introduction

Performance clarity is essential for mid-market businesses operating in competitive markets.

A thorough understanding of operational and financial outcomes provides businesspeople with the confidence to manage external challenges, such as rising costs of finished goods or raw materials. This information allows them to address possible decreases in profit margins.

Clear operational visibility offered by integrated systems provides a complete view of sales performance for everyone in the business. This transparency allows people to identify gaps, find new opportunities and be proactive.

Consolidated data on a BI and FP&A platform also helps the finance team to accurately forecast and scenario plan. Businesses in competitive markets must model potential outcomes to satisfy customers and stay profitable.



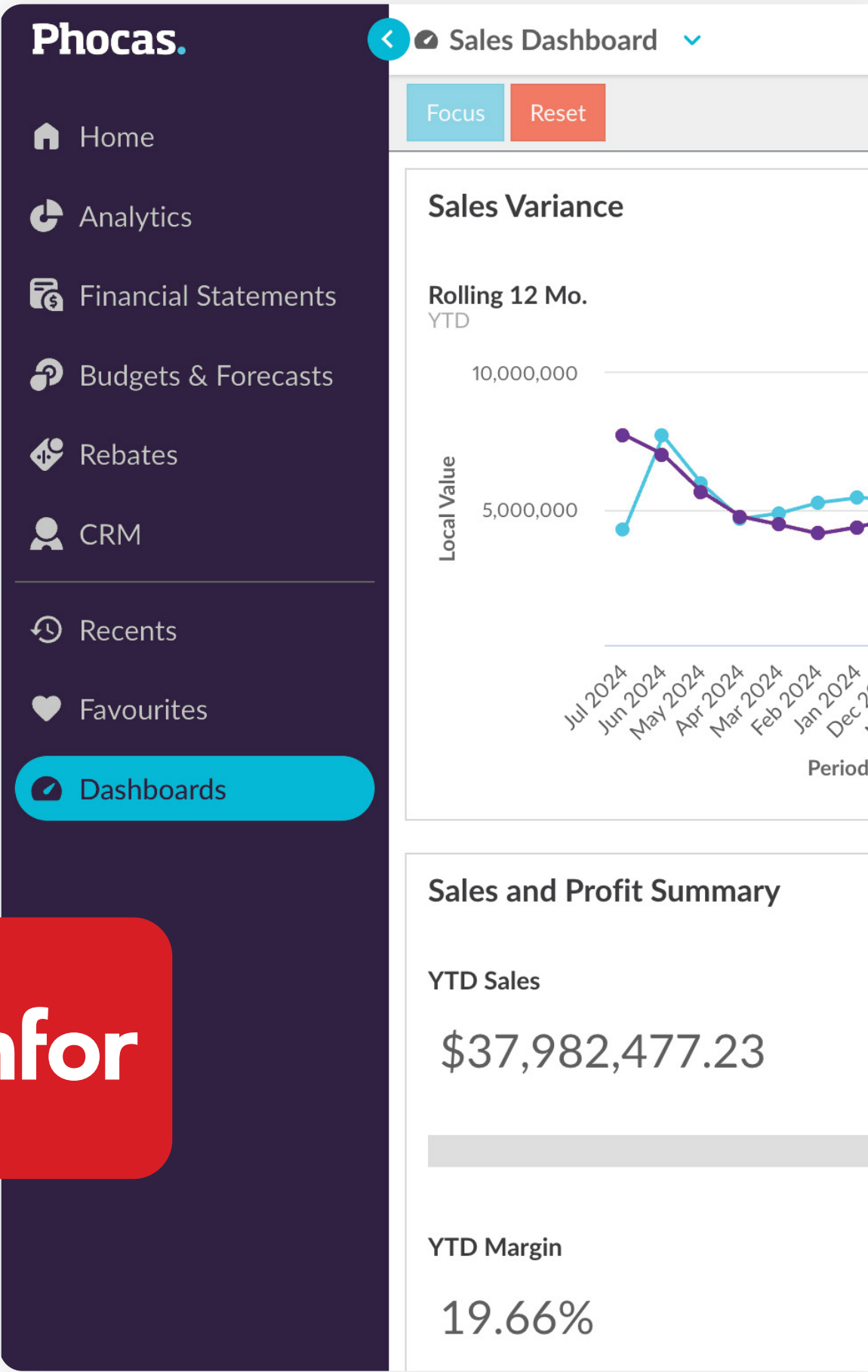
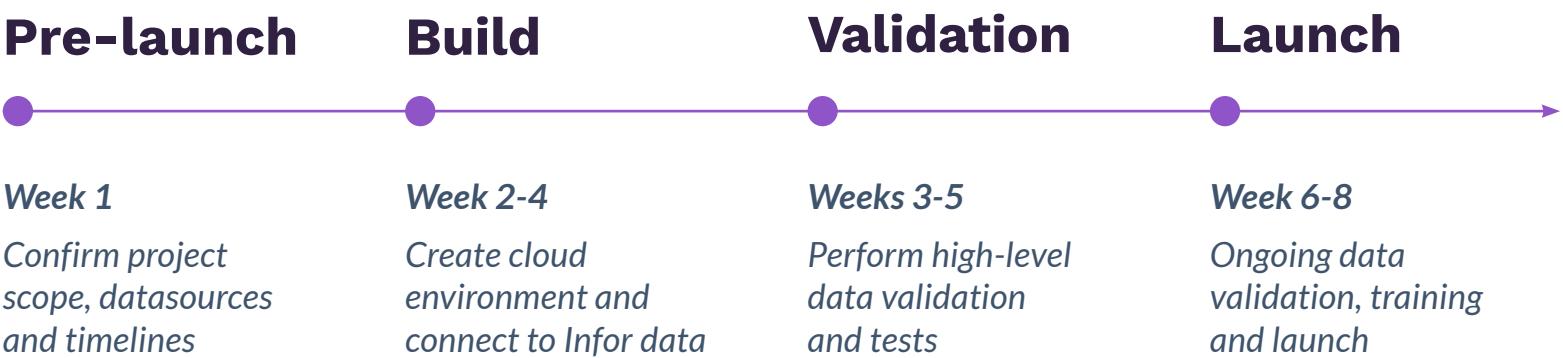
The ability to track relevant key performance indicators, analyze trends and understand variances empowers businesses to stay in control.

Combining your Infor ERP with BI and FP&A

Infor ERPs caters to large scale manufacturing and wholesale distribution businesses who often have multiple entities, branches, currencies, divisions and cost centers.

By adding a comprehensive BI and FP&A platform such as Phocas you can manage and comprehend business complexity as well as large data sets.

Phocas integrates well with Infor SX.e, Syteline, CloudSuite Distribution, CloudSuite Industrial, A+, FACTS and Visual, and its dedicated implementation team will have a custom-built solution in approximately 8 weeks up and running for a mid-size business. The BI and FP&A platform includes secure data warehousing and ongoing data refreshes customized to business needs. Soon everyone will have secure access to relevant information through user permissions.

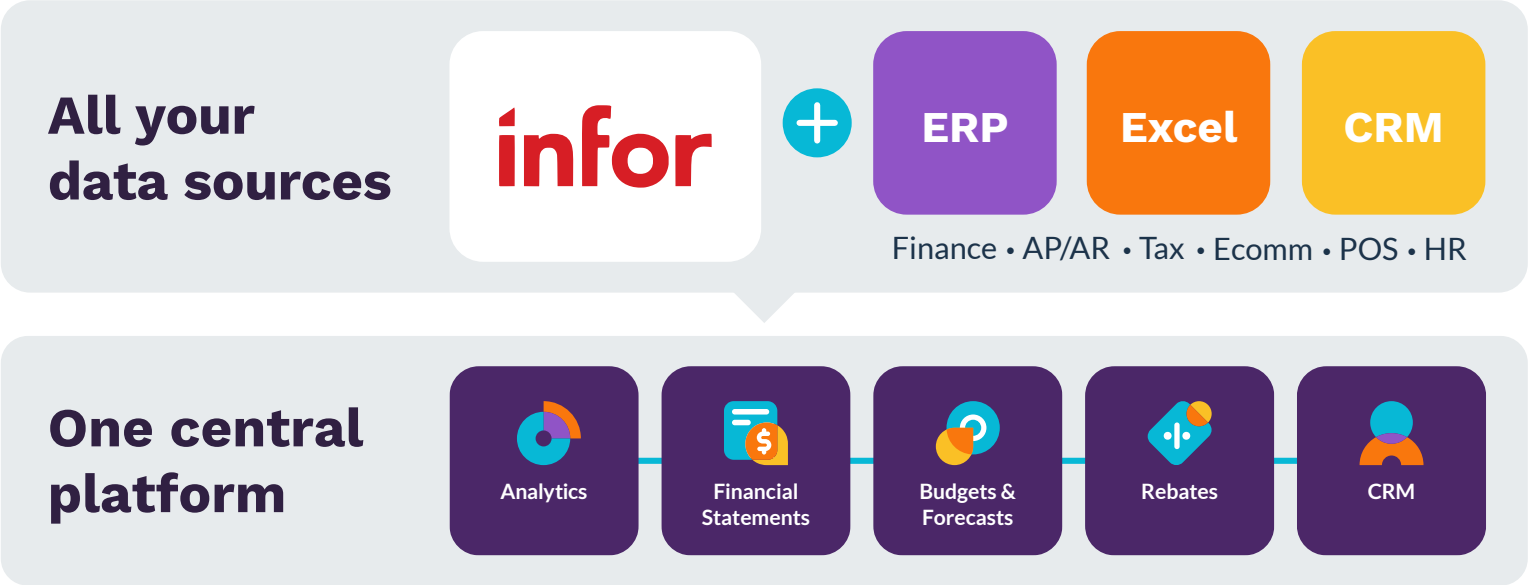


1- Reliance on a single source of truth feels good

Your company generates data from across the entire organization. Whether from customers, inventory management or sell through data coming from third parties, data flows in from all departments.

Often this is not all captured in your Infor ERP. When different teams or divisions use separate systems, it can lead to data integrity problems. To make informed decisions, balance the books, budget and forecast or collect and pay rebates, it is essential to consolidate all your information in one place so all these essential tasks derive from the same source and update whenever that source data changes.

Siloed data and external data brought together as a single source of truth



Phocas streamlines all Replenex’s data into one platform; simplifying everything into ‘one source of truth’. It can support cross-functional departments and integrates with Infor. It’s cloud-based and can easily compare multiple years of data.”

– Tony D’Aquisto, Vice President of Operations and Integrator, Replenex

[Read full case study](#)



2- Custom management and financial reporting at scale feels good

Every business is different so often finance teams need to consolidate data and measure custom formulas to fully understand performance and find new opportunities.

Many Infor users are restricted by standard one-dimensional reports which makes measuring specific parts of a business difficult. If your organization runs several divisions or branches you will also need to prepare numerous financial, board and management reports so without trusted automation this work takes days each month.

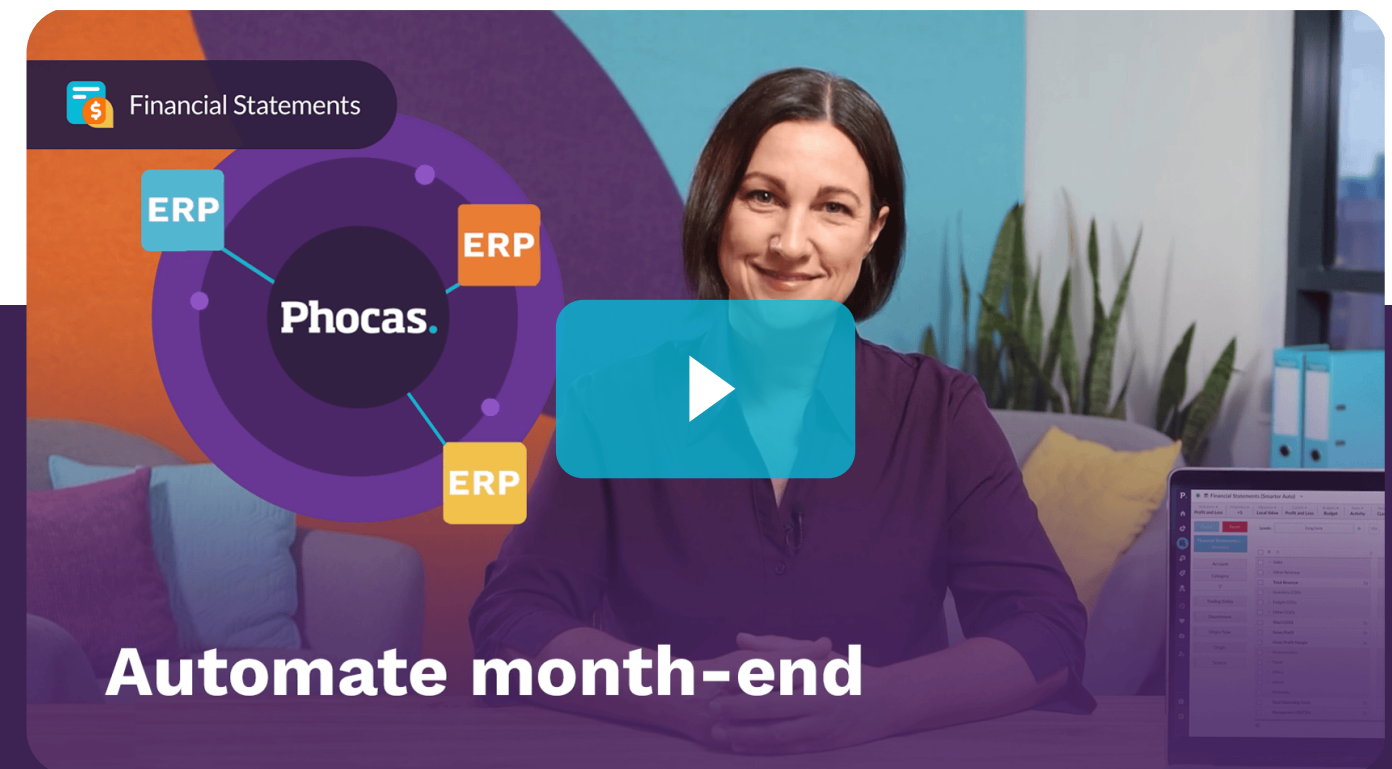
See how Phocas can automatically structure your data into up-to-date financial statements and speed up month-end close by 50%.

[Click](#) to watch this Automate month-end video (3:06 mins) for more detail.

The tools provided with Infor may not fully meet the needs for financial reporting and producing frequent reports can place additional demands on the finance team. When all departments depend on a single team, it can be challenging to meet everyone's needs and maintain flexibility.

The Phocas BI and FPA platform allows you to speed up month-end close with accurate, consolidated data for your financial statements.

Create income statement, balance sheet and cashflow statements for all divisions in a few clicks and empower the whole business with relevant financial information that is customized for their needs.



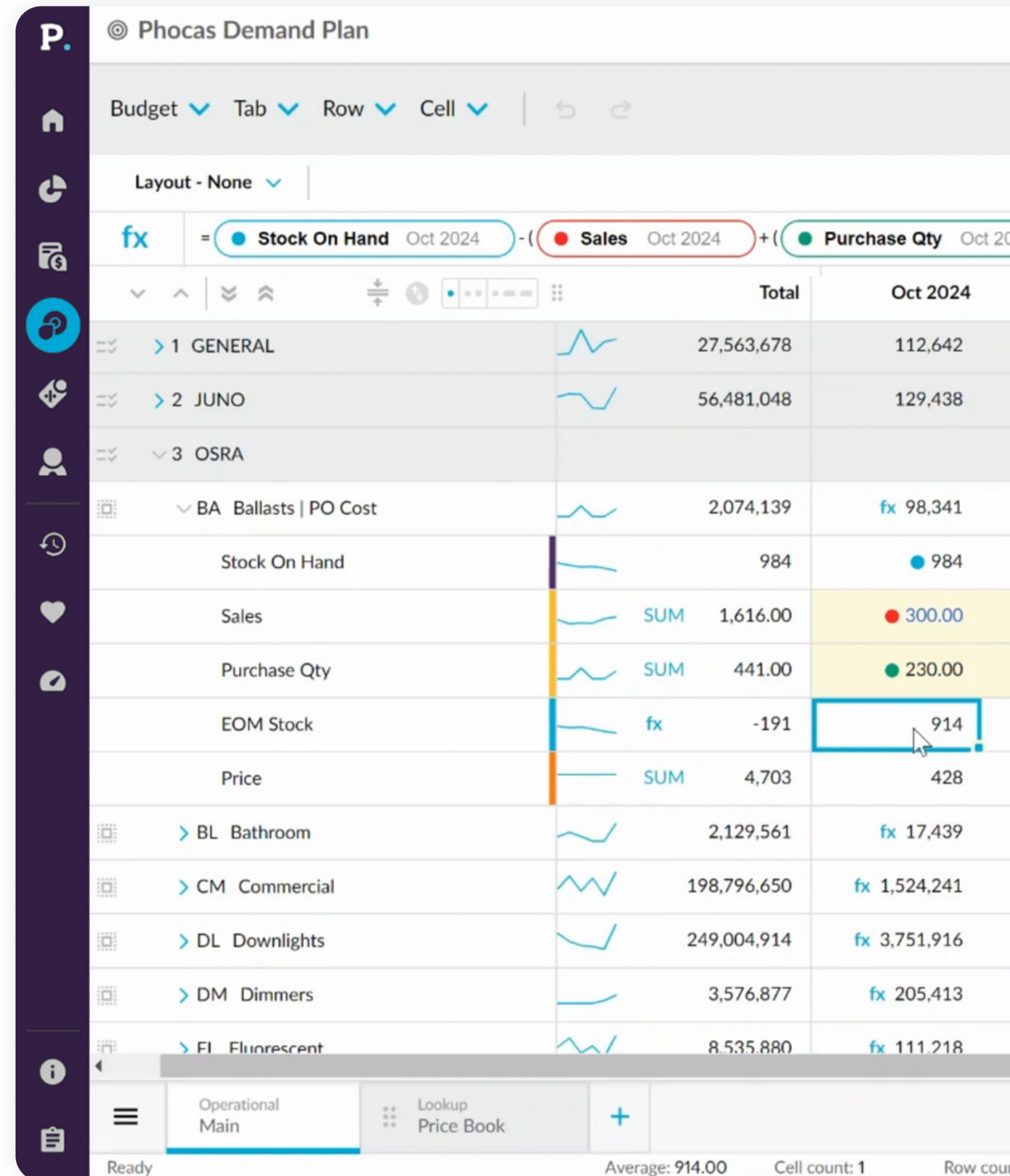
3- Connected planning feels good

Implementing strategy and having an up-to-date budget is challenging for most business without software to connect strategy, operational planning, budgeting and reporting.

BI and FP&A software helps everyone to see how the business is performing so they can hit targets and be in control of their actions.

It is often the finance team's role to dissect the strategy and support the business where it needs to go. This results in working with different teams and to gauge their priorities, so software helps to streamline and manage these discussions.

A BI and FP&A platform like Phocas facilitates real-time collaboration and enables the integration of financial and sales data which is a fundamental requirement to managing the planning process.



4- Understanding financial and operational performance across every level of a business feels good

The benefits of integrating financial and operational data using BI and FP&A software range from more accurate budgeting to deeper financial insights – two ways that help your business move with speed and provide better customer service.



[Click](#) to hear how Phocas has transformed Infor data analysis at Headwater (4:08 mins)

When teams can access consistent, real-time data, discussions are grounded in facts rather than assumptions.

When everyone in a business has access to performance figures it gets everyone on the same page and helps everyone focus on the same priorities.

When individuals are informed about the successes and areas needing improvement within the business, there is clarity and efficiency. Time is not wasted.

There is a clear understanding of what is effective and where efforts should be concentrated in the upcoming months.



Every single one of the departments uses it on a daily basis. They can drill in and get down to exactly what's happening. It's a core necessity — you can't do business without it."

– Dave Kersten, Systems Integration Manager, Headwater Companies

5- Drilling into the transactional data feels good

When a financial report is presented and someone spots an anomaly, finance people need to find the transactional information to determine why it is so different.

This can take finance teams hours to find the issue but if using a platform with structured and linked GL data, it can take a few seconds.

Learn how you can easily check for errors, spot potential risks and uncover the root causes very quickly by drilling down to the transactional data.

[Click](#) to watch this *Spot opportunities & risks* video (2:57 mins) for more detail.

Drill down in Phocas Financial Statements is a technique that allows you to move from a summary-level view of your financial data into a lower-level, more detailed view, such as individual transactions or specific account details.

This process involves selecting parts of the financial statement to narrow in on the data you wish to analyze further.

Essentially, drill down enables you to investigate underlying causes and details such as trends in revenues or expenses by allowing you to view the more granular information behind the aggregated figures in a live meeting or on the spot.



Financial Statements

Profit and Loss	
Inventory COG	19%
Customer Rebates	-627%
Gross profit margin	-15%

Spot opportunities & risks

Why Phocas makes Infor users feel good about their BI and FP&A

Phocas seamlessly integrates with Infor ERPs, offering a comprehensive solution that consolidates multiple data sources into a single, coherent view. The ease of use and the ability to access real-time data helps Infor ERP users to be confident in decisions and to be more efficient.

One of the standout features of Phocas is its ability to create and customize unlimited reports, dashboards and visualizations without the need for inhouse experts or external consultants. This empowers both technical and non-technical users to tailor reports to their specific needs.

Phocas's intuitive interface ensures complex data sets are easily accessible and actionable, making it a useful platform for Infor businesses wanting to connect their financial planning and analysis.



There is a difference between understanding data and making it actionable and deployable. We've struggled in the past because we didn't have a good platform. We had other tools, but they didn't allow us to get down to the level we needed to impact our business. With Phocas, we get actionable data and that's becoming part of our culture."

– Financial Controller, HVAC distributor and Infor ERP customer



[Click](#) to hear from the many satisfied Phocas plus Infor users in the video (2:39 mins)

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