



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

**Phocas.**

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# Introduction: the challenges businesses currently face

**The fast pace of today means more leaders are considering ways to better use technology and data to proactively enable data-driven decision making across all aspects of their businesses.**

That's because managers can no longer afford to make decisions on the run. Without access to relevant information, people are forced to rely on gut feelings and personal experience when making impactful decisions. For instance, considering how vulnerable COVID-19 has made some businesses, there is little margin for error. You can't reduce the price on a product by a small percentage for a good customer to then find they didn't increase sales as promised. Customers need to be serviced strategically so sales managers know when to sell, when to hold and when to upsell with consideration and knowledge

Whether you have a family-run organization or an international company, data should be the foundation of your strategic decision making. With the right data analysis and tools, what was once an estimate becomes actionable insight that will lead to greater business success.

# How to face these challenges?

**A simple way to harness your Infor ERP data is to include data analytics in your technology stack.**

Data analytics software converts reams of information into bite-sized insights to inform decision making. The software receives data from your Infor ERP system and other data sets via an API. Phocas then analyzes the data sets and presents findings in visual, easy-to-understand reports and dashboards.

The purpose of data analytics is to help people in an organization obtain an easily digestible summary of how a business is tracking so they can proactively address areas of concern or opportunity.

Your business' data is a valuable resource. In earlier days, not using it to inform decision making and strategy was merely inefficient; today, failing to collect and analyze your business data may make it impossible to remain competitive. By taking advantage of the insights your operations have to offer, you'll be doing all that you can to make your business adapt faster.



# Reliance on a single source of truth feels good

siloes data and external data brought  
together to a single source of truth

1

**Your company generates data across the entire organization. Whether from customers, inventory management or project updates, data flows in from all departments. So when different teams use separate systems, it can lead to data integrity problems.**

To make informed and strategic decisions, it's essential to collect data from your various sources and consolidate it into one single source of the truth. The benefit of having your data in one place is it ensures everyone in an organization bases business decisions on the same data.

Creating a single source of truth is straightforward when you use an integrated data analytics solution to connect your various data silos. When selecting a vendor, choose Phocas because it offers easy integration with your Infor ERP and other external data sources such as Google Analytics, currency exchange rates or CRM data.

Phocas users find utility in the platform by accessing data the same way they think about it, which is without friction. At the same time, someone else in the company can get to the same exact information in a totally different manner.



**“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.”**

**Nick Deccio**, Controller and Director of Business Intelligence  
Crescent Parts & Equipment, Infor SX.e user





# Access to live analysis feels good

from operational reporting to real time trend analysis sliced and diced to meet your specific needs

2

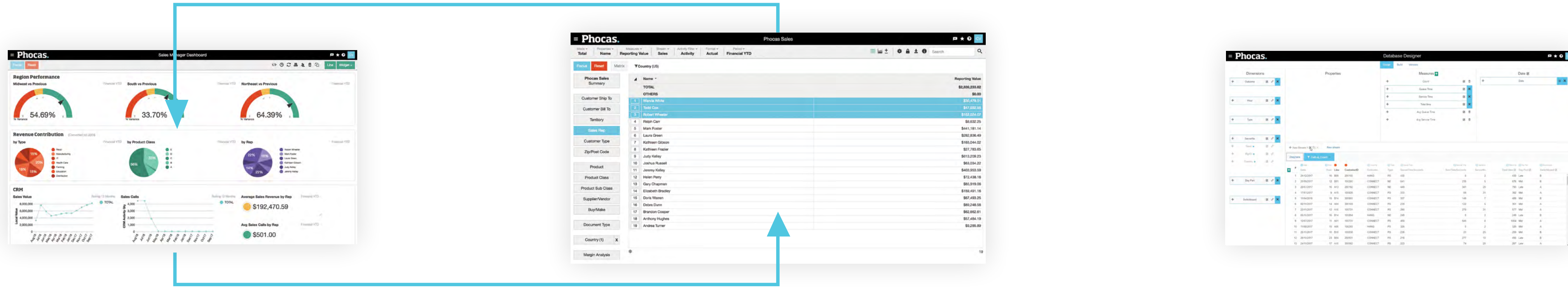
Everyone in your organization relies on your **Infor ERP** to store operational and transactional data, and provide useful information across production, operations and finance.

But where ERPs can fall short is the system does not provide easy access to real-time data and insights, since gathering information from the ERP involves time and effort.

A data analytics solution like Phocas seamlessly integrates with Infor and presents your data in more visual and accessible formats. Phocas data analytics takes analysis a step further. Building your own useful dashboards and scorecards is straightforward – but what really sets Phocas cloud data analytics apart is the ad hoc analysis layer, which is called the grid.

The grid makes it easy for users to follow their train of thought by moving from the dashboard visualizations into the underlying data to find answers to their most pressing questions. Users also uncover far-reaching business opportunities, and then easily share their findings with others in a report or dashboard format.

# Must-have 3-layer data analytics for manufacturing, distribution and construction



## 2 Visualization

- Dashboards give the full picture
- Customer scorecards enrich conversations
- Improve individual or team performance with live tracking
- Chart or graph findings and share

Toggle between these layers to move between the overview and the underlying detail at a transaction level

## 1 Analysis

Where the magic happens!

- Follow your train of thought
- Designed to fit your industry
- Designed for typical role-based KPIs
- One version of the truth, companywide
- Share datasets, views, reports and findings with others based on your access rules
- No set drill paths and canned reports – slice and dice to suit you
- **You can't break it!**

## 3 Database Designer

- Other data sources are brought in easily yourself or have Phocas help you out
- Customize to perfectly match your needs
- Drag and drop functionality



# Dynamic reporting anytime, anywhere feels good

slow, static reporting to fast, dynamic dashboards that are updated automatically

3

**Modern leaders both understand that rapid change is the only constant in the business landscape and that adopting the right technology is key to keeping pace with that rapid change.**

Managers can no longer wait days or weeks for a report about business performance or inventory; they need to make decisions immediately. For many organizations, the static reporting process continues to be arduous, especially if it's still performed manually. It's time consuming and relies mostly on transferring data from the ERP into spreadsheets, with lots of switching back and forth.

The process is slow because every update affects the numbers, making the static spreadsheet-based reports instantly out-of-date, forcing the regular creation of new versions. Static reporting hampers a business' ability to remain agile in the face of emerging challenges — which is why business leaders have demanded and sought out data analytics that support dynamic reporting.

In a Phocas dynamic report, the data is interactive. This way, any figure can be investigated, and answers can be found quickly so you can be proactive and move decision making forward.



Dynamic reporting and dashboards contained in Phocas data analytics allow you to create reports specific to the needs of your business in real time that automatically update when new data is entered into your Infor ERP.

**“ Sales reports are critical, and our sales people now run their own commission reports directly from Phocas. In addition, purchasing, executives and owners, and recently added branch managers can use Phocas for their specific needs and functions. One solution does it all.**

**Michael Clay**, Director of IT & Operations, Tropic Supply, Infor SX.e user





# Improving profitability across the business feels good

4

from new sales opportunities to  
proactive inventory management,  
streamlining waste and hitting set KPIs

Truly understanding every level of your business is critical to running a profitable organization – and one of the fundamental benefits of investing in data analytics. Data analytics has changed the way businesses adapt and enables all teams to make accurate decisions.

Bringing all of your processes together, along with your data, under a single data analytics solution can increase productivity and give you the information you need to adapt to an evolving market, customer purchasing behavior, competitive pressures and supplier pricing. It can also provide broad visibility across your operations to improve profitability and efficiency.

For a distribution business, data analytics gives sales leaders the ability to pinpoint new sales opportunities, easily evaluate the pipeline and improve customer profitability. Beyond nurturing high-performing sales teams, distribution businesses have transformed the way they manage inventory evaluating key data such as sales trends by product, territory and value, minimizing excess inventory, and identifying changes in ordering patterns of a particular customer or product.





Manufacturing businesses will be able to dig into data with Phocas to make smarter decisions to keep operational costs low, streamline production and reduce waste.

With access to all of your data together, Phocas data analytics has proven to make business processes more strategic and a great tool to keep teams on track.

**Phocas.** Stock management dashboard

Focus Reset

Select a...

Supplier Rolling 12 Months

Code	Name	PO Cost
<b>TOTAL</b>		<b>17,336,720.62</b>
1	3 OSRA	6,218,729.88
2	22 LIGHTING	994,663.40
3	14 PARTC	660,961.97
4	9 WELLMADE	458,640.99
5	8 LITHO	431,356.97
6	13 GE	412,715.12

Product sub-class Rolling 12 Months

Code	Name	PO Cost
<b>TOTAL</b>		<b>17,336,720.62</b>
1	DL Downlights	3,277,120.44
2	LV LV Lighting	2,740,719.82
3	CM Commercial	2,028,364.48
4	TR Transformers	1,799,739.96
5	SP Specials	1,614,156.81
6	LD LED	1,302,022.19

Warehouse Rolling 12 Months

Code	Description	PO Cost
<b>TOTAL</b>		<b>17,336,720.62</b>
1	006 Warehouse 6	12,509,071.61
2	004 Warehouse 4	1,363,906.74
3	002 Warehouse 2	1,286,376.60
4	001 Warehouse 1	1,144,419.65
5	005 Warehouse 5	554,065.64
6	007 Warehouse 7	277,673.10

**Stock KPI's**

Stock value Current Month **\$27,646,670**

Stock in transit Current Month **32,370 Units**

Stock on back o... Current Month **4,809 Units**

Stock on forwar... Current Month **3,282 Units**



# Using an industry-specific data analytics solution feels good

Phocas leverages expertise covering manufacturing, distribution and retail to create built in content, dashboards, KPIs and scorecards ready to go with industry data

5

Having the appropriate [data analytics](#) solution is vital to [strategic decision making](#). However, one-size-fits-all solutions don't always address a company's specific needs. Cloud technology has facilitated the rise of vertical SaaS data analytics and more customized solutions like Phocas data analytics.

With smart technology, industries such as manufacturing, distribution or retail have access to custom-tailored solutions that can help them achieve a market advantage. Because the software is customized according to industry, a company's data and insights can be leveraged to address their unique problems and grow their sales.

Phocas has done the development work for these target industries so these businesses can immediately connect the software to their ERP and other data sources. All the content is built-in like dashboards, KPIs, data cubes and reports ready for the everyday user to start answering their questions.

Phocas cloud-based data analytics provides continuous improvement in performance through the development of new features and regular upgrades, without additional cost. The solution is easy to use since it is designed with practical problem solving in mind.





# Why Phocas makes people feel good about data

**Phocas data analytics differentiates itself in a large, generic BI market by offering a specialized solution for everyday users. Mid-market manufacturers, wholesalers and retail companies choose Phocas Software because it has a low barrier to entry, and they can get results to adapt to market changes quickly.**



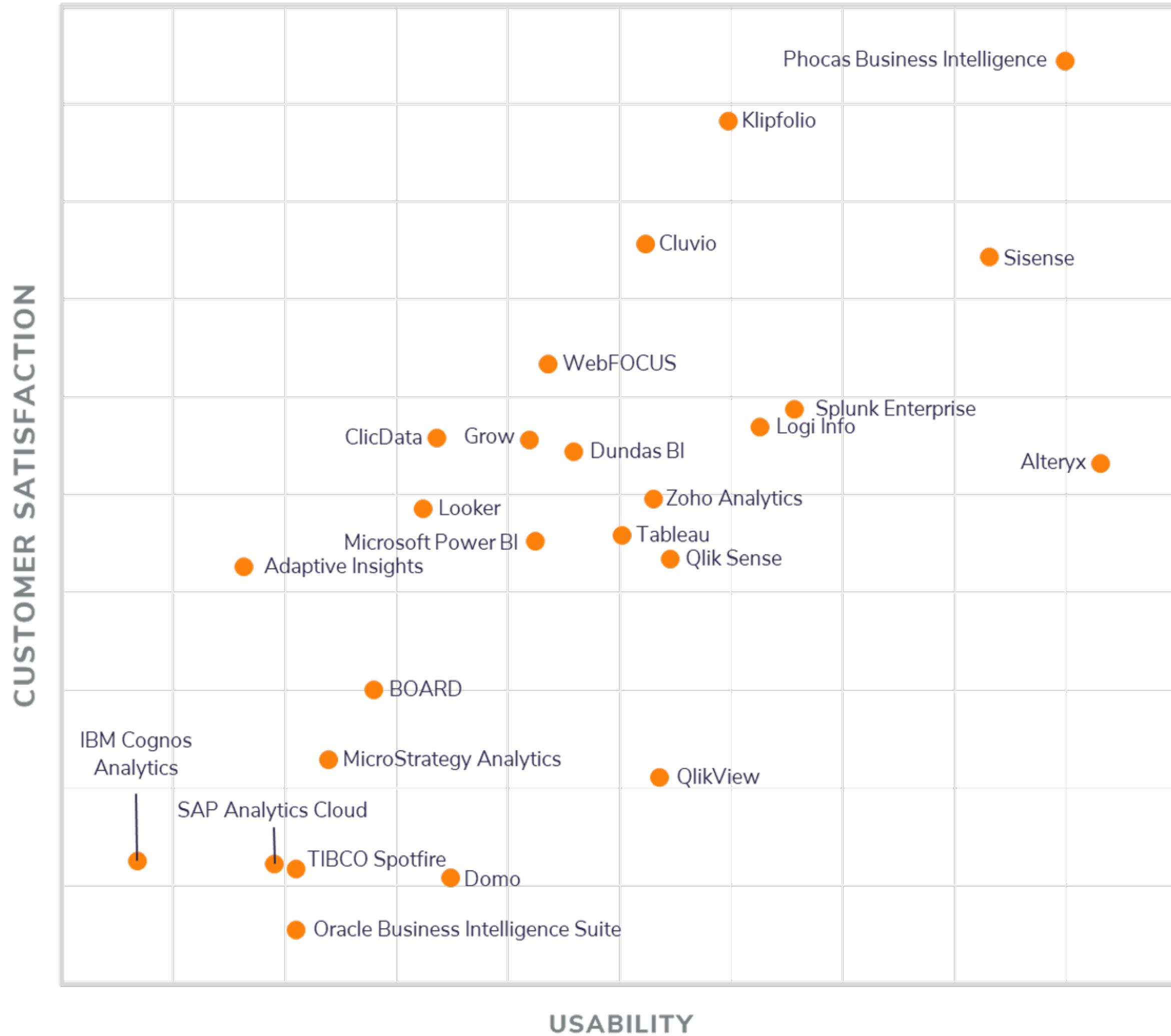
**Phocas integrates with Infor ERP systems including SX.e, CloudSuite Distribution, Syteline, CloudSuite Industrial and CloudSuite Field Service, saving on implementation time and set-up costs**

Many people in different roles use Phocas with a penetration rate of 28%<sup>1</sup> across a business compared to the industry average of 18%. Phocas is flexible and accommodates additional data sources and is scalable for a growing business. Complementary products are also industry-specific and designed to automate and customize analysis and reporting, which include Financial Statements, Rebates and CRM.

The feed of data into the system is automatic and includes security. With generic brands, businesses need to commit further internal resources to make the software work, whereas with Phocas it is all built-in and ready to go.

<sup>1</sup>BARC The BI Survey 2019

# Phocas is the top BI software in 2020.



Customers like the simple user interface and can build their dashboards, not having to rely on others to do it for them.

In a large, generic market, customers don't want to be a number in a queue, so they value the Phocas support teams in each market who provide personal service and training.

In 2020, Phocas has been voted by users as the top business intelligence software product and the top dashboard software product by Gartner's Software Advice FrontRunners.



**FrontRunners**  
Top-ranked  
Business Intelligence software



**FrontRunners**  
Top-ranked  
dashboard software

# Get in touch

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**Book a demo:** <https://phoc.as/BookDemo>