



# **Dashboards and scorecards.**

**A clear view of complex data**

**Phocas.**  
Got data. Get results.

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# You need answers now!

## What is the truth? What do you know for sure?

Managing any facet of business — sales, inventory, finance — is phenomenally complex. **You're confronted with dozens of questions and decision points every day.**

## Do you have the business intelligence you need to make the best data-driven decisions?

Sure, you have data from your ERP and CRM — and other databases, systems, and sources, too, no doubt! — but it doesn't provide insights into your most pressing questions.

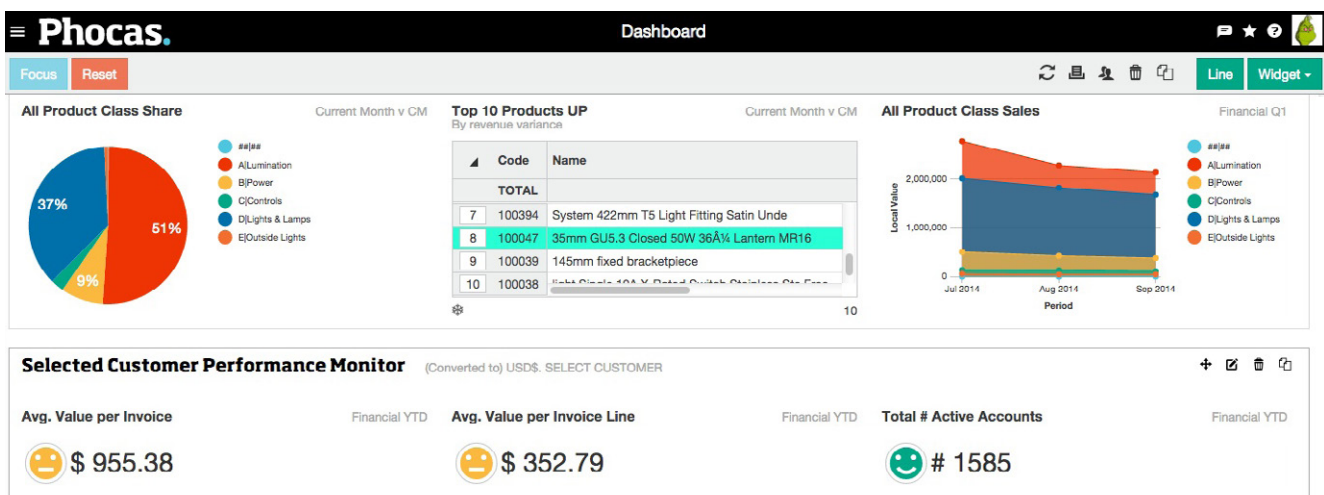
**You need a clean, clear view of critical metrics, and you need it now, whether you are in your office, at a customer site, or on the road.** You can't wait for IT to create a custom report, and the ad hoc spreadsheets that various staff members pull together are often riddled with errors.



# The answers you need at your fingertips.

You need a tool to cut through the clutter and cull out straightforward answers to your difficult questions:

- Why are sales down in the Midwest region?
- How's the new sales rep doing?
- Why is the margin really low with Customer X?
- Sales are down at the Anderson and Richmond branches. Why?
- What else can I sell Customer Y?
- How is our competitor's introduction of their new gadget affecting sales of our comparable gadget?
- It's time to clear out the slow-moving inventory.
- Why are there so many open sales orders?
- Sales Rep A has really some slow-paying customers. Why?
- Which customers are the best candidates for rolling out our new product line?
- Sales of the new gizmo are not meeting target. Why not?



**Figure 1** - Gain one view of the truth using dashboards that consolidate all your information into one screen, giving you a 30,000 ft view of the business.

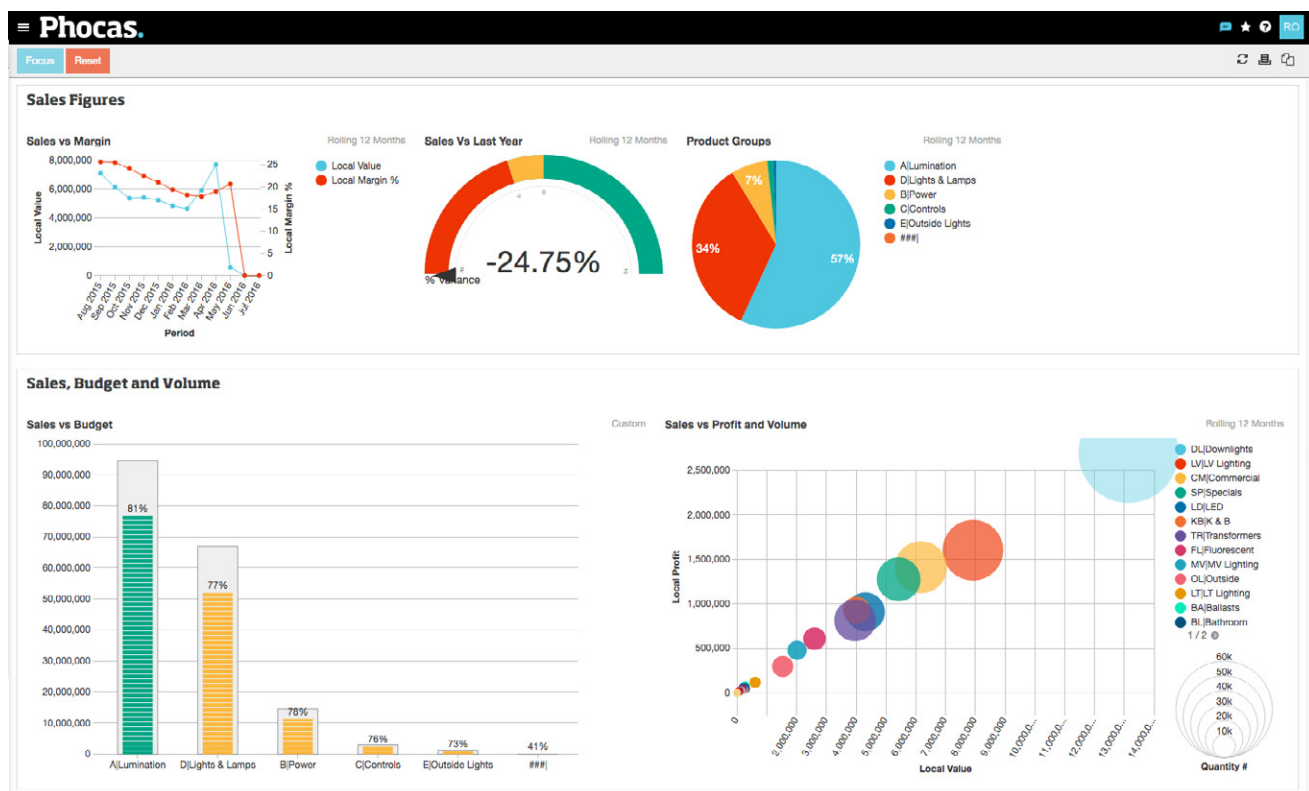
# Vexing sales challenges.

Which accounts are healthy? Are any accounts in trouble?

To stay ahead of the competition, you need to identify and analyze trends, opportunities, and threats instantaneously, as they emerge.

The data buried deep in your CRM system could give you this ability, but the canned reports don't answer your questions.

You need flexible reporting because the questions change minute-by-minute. If only you could slice and dice the data in different ways, you could generate actionable insights to drive your decisions.



**Figure 2** - This simple sales dashboard gives you a great starting point to assess performance across budgets, sales reps and cross selling. The next step would be to drill down to the underlying data for further analysis.

## Book a consultation.

Click here to arrange a free 20 minute data analytics consultation.

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# Supply chain dilemmas.

Which products are selling? Where? How quickly? How many?

Every day, you feel the unrelenting pressure to minimize inventory expense. Lean is the industry mantra, its goals efficiency and economy.

Constantly evolving technology leads to shorter product life cycles and ever-changing customer demands. Manufacturers live in a lean world, too, and backorders can injure your and your customers' bottom lines.

ERP has streamlined operations in many ways, as have VMI systems, but wading through the vast volumes of data to extract actionable information is nearly impossible. Custom dashboards and reports created by software vendors are expensive, and your own IT department is fully booked till long past when you need the information.

You need prompt and accurate Business Information that pulls from and consolidates data from every database you feed or need. Accurate demand planning for multiple branches and seasonal buying cycles is possible only when you have immediate access to up-to-the minute data. Successful demand-driven inventory management requires smart, data-driven decisions.

Phocas.

Mode

Period

Code, Name

Local Value

Sales

Activity Filter

Format

Period

Products Declining

Search

Focus

Reset

Matrix

▼ Product Group (And) [Variance (Sales Local Value for (Jun 2016)) - (Sales Local Value for (May 2016)) < 0] Variance (Sales Local Value for (May 2016)) - (Sales Local Value for (Apr 2016)) < 0] Variance (Sales Local Value for (Apr 2016)) - (Sales Local Value for (Mar 2016)) < 0]

▲	Code	Name	Total Local Value *	Aug 2015	Sep 2015	Oct 2015	Nov 2015	Dec 2015	Jan 2016	Feb 2016	Mar 2016	Apr 2016	May 2016	Jun 2016	Jul 2016
16		ound LED Bath Light IP68 - 1W LED LV R Large Size	9,250,061.09	1,005,904.80	893,423.93	906,848.37	1,023,228.01	1,064,894.16	1,136,862.55	1,090,767.56	1,137,201.36	894,267.52	94,441.83	0.00	0.00
Customer Ship To	TOTAL		401,633.92	32,926.39	42,302.22	53,415.75	49,035.67	36,540.77	42,159.67	56,635.86	53,729.67	31,059.12	1,828.80	0.00	0.00
	109111	just Pressed SQ Lantern SQ DL Pol Brass c/rv Lantente Ad XXL Size	385,123.26	32,710.15	33,636.71	23,222.16	37,115.00	45,131.84	54,478.04	41,966.08	59,385.84	54,832.24	2,643.20	0.00	0.00
Customer Bill To	109691	X33 Compact Fluorescent 7W Lantern 3000K T2 G Large Size	341,095.07	25,205.80	34,421.44	42,729.90	40,430.89	34,288.99	40,800.88	46,334.79	48,849.36	27,363.42	609.60	0.00	0.00
	109112	170W 30A/1s Lantens MR11 XXL Size	293,045.57	29,956.81	26,814.34	22,490.60	29,932.10	31,372.72	39,371.72	31,288.72	41,470.28	38,263.88	2,694.40	0.00	0.00
Territory	109093	Bionic Widgelec 21 XXL Size	281,230.76	14,667.64	24,097.64	22,228.40	29,974.40	37,182.32	39,624.12	46,313.32	37,636.32	26,726.00	2,778.60	0.00	0.00
	109094	120v 10A/1s Lantens MR11 Large Size	268,892.70	21,199.76	25,695.66	23,586.68	25,446.73	25,060.73	29,068.58	33,695.05	41,421.47	40,267.07	3,560.97	0.00	0.00
Sales Rep	70862	1e Bar G2/GU10 Spotlight White Trip XXL Size	229,897.44	43,854.12	27,472.42	28,787.48	29,865.95	38,473.36	31,144.53	23,498.99	4,486.04	2,018.25	186.30	0.00	0.00
	109096	35mm 50W 36A/1s Lantern GU10 XXL Size	215,680.90	6,800.90	17,004.05	25,180.20	43,936.40	36,390.25	36,846.50	20,088.00	16,010.40	10,257.60	1,160.00	0.00	0.00
Customer Type	905521	just Fire Protect Pressed GU10 DL R Alze Ad Large Size	208,157.13	16,810.89	20,543.14	29,136.58	33,317.42	28,964.22	23,803.29	16,493.65	20,157.37	15,113.37	1,717.20	0.00	0.00
	107301	1e CF E27 Base TW Lantern Cond XL Size	187,916.11	28,468.03	25,745.44	23,098.91	20,646.16	15,269.32	14,503.75	15,207.35	22,356.70	22,214.85	405.60	0.00	0.00
Product Class	1106542	25mm GU4 Closed 20W 36A/1s Lantern 5000Hr MR11 Large Size	185,120.37	25,713.60	19,061.25	20,211.99	33,663.41	29,308.01	23,394.66	13,071.15	11,886.68	8,471.32	240.30	0.00	0.00
	107331	4 Glass DL G6.35 Blue Glass CWL IP4 XXL Size	179,265.54	33,694.33	29,210.83	25,948.73	27,618.64	28,707.00	21,116.88	9,231.63	2,152.80	1,315.60	288.10	0.00	0.00
Product Sub Class	109630	saw 25mm Hole Large Size	178,982.42	21,335.84	17,582.77	19,274.59	25,313.59	20,254.39	19,203.69	13,826.40	18,822.11	19,046.04	3,213.00	0.00	0.00
	106443	16460 MR16 50W 36A/1s Lantern Brilliant Line 4000hrs 425 Large Size	178,274.92	20,935.88	17,422.31	22,148.17	27,317.01	22,935.57	19,551.36	14,457.29	17,740.02	15,046.41	720.90	0.00	0.00
Supplier/Vendor	106693	saw - 72mm diameter Hole Large Size	169,014.34	20,383.50	16,135.74	15,265.84	15,607.80	20,355.49	20,067.69	21,605.02	18,741.00	18,692.26	1,239.60	0.00	0.00
	106094	25mm LED Lantern - Red MR11 XXL Size	166,060.88	8,767.20	12,882.80	7,187.00	19,450.00	24,586.20	30,059.20	19,197.60	23,677.80	17,561.88	1,431.40	0.00	0.00
Buy/Make	106448	DISCONTINUED CODE Large Size	167,436.40	0.00	7,338.95	13,673.96	26,044.15	23,611.60	26,070.50	23,317.05	21,238.65	14,418.90	2,820.75	0.00	0.00
	109109	DISCONTINUED CODE XXL Size	156,853.70	12,587.90	12,587.90	9,135.70	8,251.60	16,334.80	20,292.20	24,165.20	26,203.60	25,947.60	1,347.20	0.00	0.00
Document Type	109040	100v Bionic Widgelec - 3 x AMP connr Slim XXL Size	154,160.76	24,439.62	13,096.86	15,376.97	19,058.02	20,534.63	26,367.40	19,044.00	13,782.06	3,912.30	558.90	0.00	0.00
	106657	Chrome Adj Quad Multiple MR16 Large Size	145,920.60	6,910.60	7,068.00	6,024.60	10,720.60	10,543.40	11,695.20	29,325.40	33,755.40	28,350.80	1,506.20	0.00	0.00
Country	107188	3 x 1W LED Chrome IP44 Adj. Twin Table Light CWL 12V	143,063.46	0.00	0.00	0.00	0.00	30,689.53	37,804.97	42,553.62	15,679.29	15,340.85	755.00	0.00	0.00
	111551	just Fire Protect Pressed GU10 DL Whiteste Ad Small Size	135,813.22	24,968.34	15,909.90	9,176.70	8,970.45	11,643.05	17,155.66	17,009.80	15,635.65	13,707.45	1,620.00	0.00	0.00
	107334	35mm 21pc LED Lantern - Red GU10 XXL Size	133,934.27	24,526.63	19,297.28	15,542.93	14,425.61	16,627.56	17,046.14	12,395.16	7,066.46	4,120.20	294.30	0.00	0.00
	111812	Bionic Widgelec 21 Small Size	131,985.97	15,212.22	16,630.05	18,797.35	17,407.30	13,298.60	14,360.65	12,236.65	13,851.75	8,978.40	239.00	0.00	0.00
	106632	35mm GU10 3 Closed 50W 24A/1s Lantern 5000Hr MR16 Large Size	131,285.53	9,912.11	11,226.79	16,500.13	20,868.48	18,959.08	17,482.95	15,597.25	13,481.37	8,963.07	294.30	0.00	0.00
	102025	1e CF G22 Base 9W Lantern Cond	123,570.84	33,295.02	6,500.22	10,751.00	11,247.20	13,562.80	12,405.00	12,900.80	12,405.00	10,773.40	2,481.00	0.00	0.00
	107320	GK33 7W Lantern White LED XXL Size	116,901.42	13,729.89	11,977.59	13,972.36	15,529.98	14,167.08	12,248.40	13,452.00	12,744.00	8,779.20	300.90	0.00	0.00
	109233	35mm LED Lantern - Blue GU10 XXL Size	114,891.93	13,349.34	11,230.65	9,134.97	12,660.81	9,887.22	12,939.94	11,823.60	17,016.40	15,294.30	902.70	0.00	0.00
	109629	ended Glass Multiple Four Square G2/GU10 C/w Susp Large Size	110,559.82	12,329.09	6,236.10	7,448.89	13,544.19	12,673.39	13,509.40	11,820.50	16,296.52	13,294.24	1,471.50	0.00	0.00
	109070	5 100W Capsule Lantern G6.3 XXL Size	109,627.18	8,942.04	7,256.04	7,856.90	6,357.10	12,824.70	15,165.20	15,996.60	17,520.20	14,829.40	2,897.00	0.00	0.00
	107324	1u Fix Trip Decorative Table Light Brushed A GU4 A XXL Size	108,886.15	12,650.19	11,559.87	10,866.03	13,060.83	11,007.63	12,620.10	9,257.10	13,443.90	12,818.90	1,503.60	0.00	0.00

Figure 3 - Keep an eye on the core metrics and combine information from different data sources such as comparing Sales to SOH.

# Get the business intelligence you need.

## Phocas rated #1 for business intelligence solutions

In the annual BARC BI customer survey, Phocas was voted N° 1 for visual discovery and N° 1 for ad-hoc reporting in 13 categories, including business benefits, performance satisfaction, mobile BI, and cloud BI.



## Powerful & Empowering

- Information is power. With immediate access to the exact data you need, you make the best strategic, tactical, and operational decisions.
- Empower employees to access the information they need to manage their own performance and success.
- With Phocas BI, you access and consolidate data buried deep in ERP, CRM, etc.
- Leverage data to analyze trends, identify opportunities, and isolate threats.



**Figure 4** - Access to these dashboards should be easy and available from just about anywhere, on any device — so you can make better-informed decisions quickly.

## Simple, Logical & Easy to Use

- Implement Phocas BI easily and quickly. No coding necessary.
- Nontechnical employees can quickly, easily create custom dashboards, scorecards, and reports—without IT dependency.

## Transparent

- Because you mapped out the data path, there's no mystery about where the data came from. Just follow your train of thought, asking the next question, then the next, till you have unraveled the mystery and possess actionable insights.

## Responsive

- Interactive data visualizations deliver answers to your immediate questions immediately.
- Refresh data every 15 minutes, one hour, or 24 hours. Phocas BI accommodates your preferences.
- When you're on the move, get answers on your laptop, tablet, or smart phone.
- Work with live data, instead of relying on static, canned reports from last week or last month.





## Flexible, Dynamic

- Slice and dice the data into myriad, interactive configurations. Analyze by product, customer, sales rep, branch, territory, etc. With Phocas BI, your options are endless.
- Select the most meaningful representation of data—graphic, numerical, or both—for your various audiences.
- Follow your train of thought through the charts and tables to discover the data you need to make smart, informed decisions.

## Universal & Scalable

- Phocas BI provides connectors for databases in most ERP and CRM systems.
- When your success prompts expansion, additional staff, new markets, another branch, Phocas BI grows with you.

## Unparalleled customer satisfaction

- Phocas enjoys a 97% customer retention rate and the appreciation of thousands of customers.



“Management, branch managers and sales people have immediate access to information and the ability to drill down quickly. They are able to come in, see their dashboards, and have immediate action items for the day which has improved relationships, customer retention & acquisition, and deal close rates.

**The dashboards and scorecards are very easy to create, manipulate and analyze.** They are created for anyone from the counter to senior management and you don't require any programming experience. It's very logical and intuitive. And, they can be rolled out to many people, quickly.”

**Chris Wallace**, Systems Analyst, US Electrical Services, Inc.



# Get in touch.

For more information, visit:

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