Infor SX.e eBook.

Make data-driven business decisions

Phocas.

Got data. Get results.

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ERP systems are melting pots of business data.

If you're like many wholesalers and distributors, you have a mountain of information that is collecting in your ERP system.

You may not fully realize everything that is contained in the volumes of data or everything that it can do for your business, but you know there is value in the growing pool of information. What many companies are finding is that a companion business intelligence (BI) tools can complement their ERP systems, turning the data into strategic insights and sales opportunities.

ERP and the data dilemma.

Hundreds of wholesale distributors in the building materials, plumbing, electrical, HVAC, janitorial and sanitary supplies industries are using Infor SX.e to streamline their business processes and drive growth and opportunity throughout their operations.

SX.e is the system you access first and throughout the day.

The ability to access from a single dashboard a clear picture of performance of your core business processes, from supply chain, procurement, and inventory to finance and human resources, is critical to becoming a data-driven organization. After all, you are being challenged every day to improve customer service and increase sales. You count on your ERP and the data you collect to make those processes easier.

Each of your core functions generates significant amounts of data on any given business day. Your ERP system is designed to help you manage your business processes, aggregate and automate the flow of your information so you can monitor and manage the day-to-day needs of your business. Bringing all of your processes together, along with your data, under a single system can increase productivity and help you adapt to an evolving market. It also provides broad visibility across your organization and improves profitability and operational efficiency. Oftentimes, however the volumes of data coming from across your enterprise can make effective and timely decision-making more difficult than it needs to be. Getting information into your ERP system can be easy. Getting meaningful data out can be a challenge.

How can you get more reporting power from the data that sitting in your Infor SX.e systems?

A growing number of SX.e users are adopting BI software to get even more from their data.

This eBook will outline the key benefits of integrating BI into your ERP system and provide details on how BI can support your entire enterprise from management and sales, to inventory and purchasing, and finance.

What is business intelligence and why is it important?

[Forrester Research](#) defines BI as "a set of methodologies, processes, architectures and technologies that transform raw data into meaningful and useful information used to enable more effective strategic, tactical and operational insights and decision-making."

While every company collects information, it's the ability to turn that data into results that is the power behind BI.

As a business leader, you face a number of uncertainties, from market conditions and competition to customers' buying behavior. BI minimizes the uncertainty of the future of your business by turning your raw data into easily understood charts, graphs or maps. With BI you can review past performance, identify trends and discover opportunities that can help you achieve your goals and objectives. BI is important because your team, at every level of your business, can be empowered with information to make more strategic business decisions.

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# Five key reasons to integrate BI into your ERP.

1. Visualization

Instead of spreadsheets and numbers, BI presents data in easy to read and understand charts, graphs and maps that allow you to drill down to deeper levels of information.

2. See the big picture

BI systems not only pull data from ERP systems, they also consolidate data from other data siloes across the enterprise. BI brings information from other systems so that you can see the big picture.
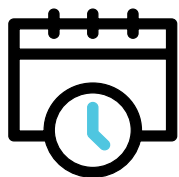
3. Understand the past and present

The consolidated data presents a combination of historical and real-time performance to provide intelligence behind the numbers so that you can make more informed strategic decisions.

4. What, where and who

Using BI dashboards, your team will be able to identify a variety of business opportunities. Your sales team, for example will quickly be able to determine what products are selling, what regions are in need of attention, and who would be key customers to focus their attention.

5. Efficiency

With BI, you can make smarter decisions faster by generating better reports, identify new sales opportunities and find ways to reduce costs. In addition, the actionable insights mined from your data will help eliminate the uncertainty of the future and allow your team to focus on meeting key business objectives. With better data, they can get things done with more confidence.

Business intelligence for all areas of the business.

A growing number of Infor SX.e customers are turning to Phocas Business Intelligence Software for simple, easy-to-understand reporting.

Phocas is designed for all levels of the business, providing detailed reporting capabilities for management, sales, inventory and purchasing, and finance and accounting.confidence.

Calico invests in Phocas, creates a more focused sales strategy

Overview: Calico Industries was founded in 1923 and is a leading, national distributor of commercial kitchen appliances, food service products and janitorial supplies. Calico is based in Annapolis Junction, Maryland.

Challenge: Calico was using a backend legacy system from IBM with Infor software, and was struggling to help the sales team identify new opportunities. Producing sales reports required the sales team to go through the IT department who spent enormous resources writing queries and developing reports.

Solution: Deployed Phocas to give sales team access to trusted data without having to go through the IT department.

Benefits: Phocas saves the IT director about 20% of time to focus on other projects. Senior management is armed with more information about salespersons, individual contracts and how well products are performing, while the sales team has a much clearer picture of new sales opportunities and the ability to maximize the value of every account.

> "Phocas provides us with a lot of flexibility to extract data from our system and provides us with an intuitive interface to our sales data in ways which were extremely cumbersome prior to Phocas being installed…"

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BI summary.

Here is a summary of how BI can help in these various areas of your business.

1. Management

Many of the business processes that executives need to track can be addressed with BI and analytics.

In the past, your business leaders have likely leaned on manually produced spreadsheets to manage and track your company's performance. Time is critical, and what they need to see is not rows and columns of numbers, but visual representations of the data that help them quickly see trends and key performance indicators. With BI, you can quickly get to the point, reducing pages of reports to a single dashboard that allows them, if needed, to dig deeper into more detail. Your BI systems should deliver real-time information and allow your leadership team to monitor while on the go through their mobile devices.

An integrated Infor SX.e and Phocas package provides the following reporting features for management:

- No longer do you need to be an expert in the SX.e structures to get quick access to data to stay competitive

- Analyze profits driven by GL and commission costs

- Compare sales, inventory and purchasing figures (by customer type, product line, rep, branch, stock/direct) across time periods in minutes

- Access from any device, anywhere

- Deploy in cloud or on premise

- Quick install and modifications

- Export to Excel and share in a few clicks

- Get decision makers to delve deep into your data to uncover answers and opportunities

2. Sales

Sales managers and directors need to be able to quickly and effectively communicate the progress and performance of their sales team.

They need data to show team members how they can be more efficient, what products they should sell, who they should focus their efforts and where the opportunities are. BI gives them insight into their sales pipeline, helps them understand their performance compared with revenue goals, provides the historical context for more accurate forecasts, and illustrates how effective they are with everything from lead response time to win-loss rate.

An integrated Infor SX.e and Phocas package provides the following reporting features for sales:

- Details about product categories that are selling and those that aren't

- Analyze performance at the ship to or bill to customer level

- Link-sell and sales opportunities

- Targeted promotions

- Prospective customers for new products

- New customers for your best margin-earning products

- Where sales are slipping

- Monitored targets for volume, value, margin, sales rep, branch, customer and product

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3. Inventory and purchasing

Managing inventory is a complex challenge, so it's critical that inventory and purchasing managers have a clear view of what is coming and going out to help improve efficiencies, avoid mistakes and do their part in keeping costs down.

With BI, inventory and purchasing can track everything from dead and backordered products to current stock levels and product movements. A BI tool will empower everyone in these departments with actionable data they can use to make proactive and quick business decisions.

An integrated Infor SX.e and Phocas package provides the following reporting features for inventory and purchasing:

- Filter by stock flag

- Stock turns

- Slow-moving stock

- Supplier discounts

- Warehousing requirements

- Inventory investment at-hand

- Lower inventory values

- Purchase-to-sales ratios

- Inventory value and quantity on-hand across all warehouses

- Intercompany stock control between warehouses based on stock levels and usage

- Open / historical / future / outstanding orders

- GMROII by manufacturer, product group, product and branch/store

Book a consultation.

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

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4. Finance and accounting

Your finance and accounting team is responsible for managing budgets, forecasting financial performance and ensuring your business is complying with regulatory requirements.

The right BI tool will allow them to quickly and easily collect the data they need from across the organization to conduct the analysis, answer questions regarding performance, and prepare the reports that senior management wants to see and that are required to keep the business compliant.

An integrated Infor SX.e and Phocas package provides the following reporting features for finance and accounting:

- Profit and loss, balance sheet analysis on the fly and reports

- Accounts receivable and payable analysis

- Cash flow data

- Expenses breakdown by branch / by employee

- Transactions by branch / customer

Conclusion.

Your business is producing a large amount of data every day.

Much of it is collected in your Infor SX.e ERP system. Now that you have the data, it's time to bolt on best-of-breed data analytics to connect your disparate data resources and turn information into intelligence.

BI systems, such as Phocas Software, integrate your ERP information, as well as data from other systems, into a single, centralized data display grid and dashboard. Data is presented visually, providing historical context and real-time information so you have a complete picture of your operations and performance. With the intelligence, all areas of your business have equal access to the charts, graphs and maps they need to be more efficient, identify trends, address challenges and capitalize on opportunities that will allow your business to achieve its business goals.

💬 **Customer stories.**

Click here to learn what **Calico Industries** did to create a more focused sales strategy.

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Thanks for reading.

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