



**Simple, powerful business intelligence**

**[www.phocassoftware.com](http://www.phocassoftware.com)**

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phocas Keep It Simple press

## Lost Customers

1 to 100 of 311 | Focus | Reset | 2011 (2010) | Export

#	Code	Name	Total	Jan 2011	Feb 2011	Mar 2011	Apr 2011	May 2011
(0)	TOTAL		67,564.94	8,419.07	10,929.05	9,245.71	7,876.85	10,811.27
1	USPG_109-003	Young Scientist	4,318.04	231.50	1,273.27	46.30	115.75	2,373.22
2	USPC_114-006	J & A Stoves	3,434.45	0.00	2,495.35	112.41	432.77	116.44
3	USPE_125-007	Jemco, Inc.	2,175.06	72.89	0.00	0.00	0.00	204.44
4	USPI_060-002	Advanced Electrical Machines, Inc.	1,955.00	70.62	1,106.38	0.00	0.00	845.44
5	USPB_175-009	Edale Limited	1,633.26	0.00	0.00	0.00	1,240.90	392.33
6	USPZ_263-004	Rhos Radio	1,469.99	0.00	0.00	0.00	0.00	176.22
7	USPG_114-005	The Light Gallery	1,451.76	654.10	(300.48)	104.59	209.89	69.66
8	USPZ_577-005	Brimley Electrical Wholesale	1,405.12	725.88	22.68	192.92	0.00	22.66
9	USPC_009-007	Baldor Electrical Carbon, Inc.	1,372.20	11.11	470.44	15.61	483.70	24.55
10	USPA_171-003	Arts Council of Wales	1,290.66	5.51	607.68	17.33	0.00	115.77
11	USPK_061-006	Leigh Lighting, Inc.	1,214.49	77.59	220.58	779.42	0.00	86.77
12	USPZ_510-003	Tgi Fridays Accounts Dept	1,150.50	445.42	0.00	219.97	0.00	4.55
13	USPE_139-004	S B Motors	1,106.55	35.73	0.00	0.00	611.32	13.66
14	USPE_114-008	Trench Electronics, Inc.	1,081.51	0.00	0.00	140.14	0.00	23.22
15	USPB_169-004	Dusk to Dawn Security, Inc.	1,081.30	419.29	222.85	371.52	0.00	206.44
16	USPB_052-003	Seton Industries, Inc.	1,076.95	0.00	226.84	616.92	0.00	175.33
17	USPQ_035-005	The Power & Lighting Centre	1,068.09	0.00	13.66	0.00	0.00	0.00
18	USPC_206-008	MSG-Marketing & Events	921.22	0.00	195.86	0.00	0.00	0.00
19	USPZ_219-006	J M Peterkin And Son	908.18	0.00	0.00	0.00	0.00	0.00

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**What is Phocas?**

**Phocas** is a unique award-winning business intelligence tool for manufacturing, distribution and retail companies that normally sell large ranges of products to a wide customer base.

Typically, **Phocas** is used by Sales & Marketing, Management, Finance, Purchasing and IT professionals who are determined to capitalise on every opportunity possible using whatever tool that is available, without wasting time manipulating data or asking the IT Manager.

At the core of **Phocas** are two key principles:

Firstly, it gives you access to all of your data, by any criteria in any order and in any combination. But it does this instantly.

**Phocas** is not to be confused with data extraction tools or sales reports generators... no setting up, no templating. Anything you can legitimately ask about your data is answered. It promotes interactive use, allowing you to follow your own train of thought to get a true picture.

Secondly, **Phocas** equips you with “intelligence” to make better business decisions in real-time, frequently resulting in:

- Sales opportunities
- Efficiency gains
- Improved margins
- Purchasing savings
- Better stock management
- Enhanced processes
- Pricing gains
- Lower aged debt
- Better financial reporting

Sceptics tell us “But my IT Manager already gets me lots of sales reports!”

Absolutely. But do they show you immediately how you can sell more today... and every day?

Do they reveal not only what you are selling, but also what you’re not selling and what you could be selling, in real time?

Do those reports reveal where your best opportunities lie to improve your margins instantly?

**Phocas** can and does. A demonstration takes less than one hour and will show you what you can really achieve!

**Simple.**

**Powerful.**

**Mobile.**

**Affordable.**

## Simple.

**Simple for users.** Phocas brings simplicity and usability to a complex data landscape, without the need for IT. Self-service analysis puts the power of BI in the hands of the business user, and a logical, intuitive interface allows users to follow their own train of thought with minimal or no training required.

**Simple for IT.** Simple to install, simple to deploy, simple to maintain. Phocas ranks number one for fastest implementation\*. No need to build cubes, matrices or databases before you can run one query, as Phocas is implemented with a pre-built framework. Adapts to dynamic businesses as modifications are effortless.

## Powerful.

- Phocas ranks as a leader in **Exceeding Business Goals**\*
- Phocas ranks as a leader in **Performance Satisfaction**\*
- Phocas ranks number one for **Customer Satisfaction**\*
- Phocas most often chosen for **Ease of Use**\* and ranks as leader in **Ease of Use** †
- Phocas ranks as a leader in **Overall customer experience**, †
- Phocas ranks as a leader in **Overall BI success** †

## Mobile.

**Phocas mobile BI** means you can access Phocas anywhere, via PC, tablet or smartphone.

## Affordable.

**Phocas** is supplied on a simple subscription basis so your upfront costs are low and Return on Investment is almost immediate.

\*Independent BARC BI Survey 10 (October 2011) and BI Survey 12 (October 2012). [www.bisurvey.com](http://www.bisurvey.com)

† Gartner: Survey Analysis: Customers Rate Their BI Platform Vendors, August 2012 ([www.gartner.com](http://www.gartner.com))



# Opportunities at your fingertips.

With outstanding ad-hoc analysis, you can explore further, dig deeper and follow your own train of thought.

## Which customers are buying Brand A but not Brand B?

Brake pads and brake discs, A/C equipment and line sets, fluoro lamps and ballasts, tools and accessories, soap and dispensers, mops and buckets, pipes and fittings, machinery and consumables. No matter your query, Phocas enables fast link-sell and up-sell gaps to be analysed and targeted in seconds.

	Code	Name	Total	Brake Pads	Brake Discs
TOTAL >>			561,623.99	561,623.99	0.00
1	USPK_156	Largs Hardware Services	87,307.20	87,307.20	0.00
2	USPQ_163	N/W Cash & Carry.T/A Natsons L	85,679.46	85,679.46	0.00
3	USPD_107	Potential	83,724.18	83,724.18	0.00
4	USPS_140	Airotronics Power , Inc. - MA	72,402.68	72,402.68	0.00
5	USPZ_507	Six Continents Retail, Inc.	8,361.01	8,361.01	0.00
6	USPQ_140	Allders - Greensboro	6,248.12	6,248.12	0.00
7	USPS_139	BHC Electrical	6,029.19	6,029.19	0.00
8	USPZ_663	Cenpac (A.I.S.), Inc.	5,189.76	5,189.76	0.00
9	USPP_137	Tradition Hotels - Edenton	5,070.32	5,070.32	0.00
10	USPE_182	St. LUSAes C of E Primary School	4,402.47	4,402.47	0.00
11	USPK_183	Victoria Gardens	3,763.22	3,763.22	0.00
12	USPA_139	*** Account Closed ***	3,685.64	3,685.64	0.00
13	USPB_201	Flax Mean Sheltered Housing	3,567.60	3,567.60	0.00
14	USPK_166	Welcome Break Group, Inc.	3,512.08	3,512.08	0.00

But this is just the tip of the iceberg. Get real-time answers to legitimate business questions, instantly. Phocas provides intelligence across Sales & Marketing, Purchasing, Inventory, A/R, Financials, Supply Chain and Manufacturing



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http://www.phocassoftware.com

phocas Focus Reset Variance Inventory Turns Rolling 12 Months Phocas User

Sales	Code	Name	Cost of Goods Sold	Avg Inventory	Inventory Turns
TOTAL >>			74,928,774.92	14,014,506.00	243.49
1 3	OSRAM SYLVANIA	36,030,932.40	6,350,919.00	5.67	
2 14	BARTCO LIGHTING	11,947,849.29	1,909,413.00	5.94	
3 30	INVERTER SYSTEMS, INC.	7,087,165.22	935,262.00	7.58	
4 11	INTENSE LIGHTING	5,097,370.24	641,736.00	7.94	
5 13	GE INDUSTRIAL SYSTEM (TLC)	4,887,103.60	1,738,491.00	2.87	
6 22	LIGHTING SERVICES INC	1,958,578.58	250,131.00	7.83	
7 8	LITHONIA LIGHTING	1,041,893.89	576,918.00	1.81	
8 27	MERCURY LIGHTING	632,030.82	92,376.00	6.84	
9 29	COLOR KINETICS, DISTRIBUTION	622,167.91	132,261.00	4.70	
10 5	LITHONIA LIGHTING	572,750.20	61,386.00	9.33	
11 32	FIBELITE	473,352.02	23,715.00	19.96	
12 33	ZUMTOBEL STAFF LIGHTING, INC.	412,654.05	80,916.00	5.10	
13 35	SCOTT ARCHITECTURAL LIGHTING	325,481.44	46,149.00	7.05	
14 7	AMERLUX LIGHTING	295,971.97	139,533.00	2.12	
15 28	SPECTRUM LIGHTING	280,296.68	148,242.00	1.89	
16 34	SILBTFAR	262,803.36	40,023.00	6.56	
17 6	THE GENLYTE GROUP	254,040.16	78,597.00	3.23	

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## Inventory Turns

View and analyse stock turns and identify slow-moving stock

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phocas Focus Reset Variance GMROI Rolling 12 Months Phocas User

Sales	Code	Name	GM Whse	Avg Whse Inventory	GMROI
TOTAL >>			40,458,188.88	14,014,506.00	175.57
1 3	OSRAM SYLVANIA	19,410,359.19	6,350,919.00	3.06	
2 14	BARTCO LIGHTING	7,386,176.89	1,909,413.00	3.87	
3 30	INVERTER SYSTEMS, INC.	4,051,392.85	935,262.00	4.33	
4 11	INTENSE LIGHTING	1,279,194.22	641,736.00	1.99	
5 36	SHAPER LIGHTING	791,532.29	178,581.00	4.43	
6 8	LITHONIA LIGHTING	725,771.87	576,918.00	1.26	
7 7	AMERLUX LIGHTING	640,451.94	139,533.00	4.59	
8 13	GE INDUSTRIAL SYSTEM (TLC)	630,088.61	1,738,491.00	0.36	
9 35	ZUMTOBEL STAFF LIGHTING, INC.	475,391.28	80,916.00	5.88	
10 20	ELECTRONIC THEATRE CONTROLS, INC	422,685.50	52,944.00	7.98	
11 29	COLOR KINETICS, DISTRIBUTION	420,421.21	132,261.00	3.18	
12 35	LITON LIGHTING	368,573.97	29,952.00	12.31	
13 27	MERCURY LIGHTING	335,071.23	92,376.00	3.63	
14 32	FIBELITE	326,055.11	23,715.00	13.75	
15 15	FRESCOLITE MOLDCAST	290,560.81	81,114.00	3.58	
16 25	SCOTT ARCHITECTURAL LIGHTING	289,677.34	46,149.00	6.28	
17 5	LITHONIA LIGHTING	213,179.18	61,386.00	3.47	

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## GMROI

Explore gross margin return on inventory investment

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phocas Focus Reset Variance Purchase orders Rolling 12 Months Phocas User

Purchases	Code	Name	Cost	AvgLeadTime	Quantity	Avg Cost Per Item
TOTAL >>			36,899,182.77	7.96	18,354,187.00	2.01
1 24757	SCHNEIDER ELECTRIC	10,889,307.24	7.99	81,840.00	133.06	
2 25105	MERSEN (FERRAZ SHAWMUT)	3,639,891.35	8.30	456,003.00	8.58	
3 25263	ENCORE WIRE CORP.	2,347,161.99	7.93	5,252,928.00	0.45	
4 26139	COOPER BUSSMAN	1,509,528.53	7.86	899,546.00	1.68	
5 35252	LITHONIA LIGHT INC PRODUCTS	1,042,638.32	8.97	2,794.00	374.51	
6	From Transactions	973,951.28	7.86	12,199.00	79.84	
7 24862	Portfolio	847,613.82	7.83	6,296.00	134.63	
8 25141	HUBBELL WIRING DEVICE-KELLEMS	782,523.76	8.00	84,925.00	9.21	
9 24739	SOUTH/WIRE/SENATOR	701,673.29	8.12	2,842,565.00	0.25	
10 25589	THOMAS & BETTS CORPORATION	641,089.75	7.84	1,151,769.00	0.56	
11 25928	RUSSELECTRIC INC.	621,766.00	7.56	10.00	62,176.60	
12 25276	FUSCO-DALLAS	478,501.85	7.86	217,487.00	2.20	
13 25136	HOFFMAN ENCLOSURES, INC.	465,094.87	7.80	10,023.00	46.40	
14 25448	NORBERG INDUSTRIES, INC.	396,445.69	7.99	4,585.00	86.28	
15 26174	HERITAGE PLASTICS	371,390.61	8.39	790,193.00	0.51	
16 25140	HUBBELL LIGHTING DIVISION	369,876.23	8.01	2,443.00	151.44	
17 25651	WIREMOLD	354,463.01	8.01	14,918.00	23.76	

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## Purchase Orders

Analyse a purchasing database showing open orders and lead times

## Lost Customers

Re-engage with customers that are declining, or have stopped buying altogether

Code	Name	Total	Jan 2011	Feb 2011	Mar 2011	Apr 2011	May 2011	Apr 2011
TOTAL		67,564.94	8,415.07	10,929.05	9,245.71	7,876.65	9,245.71	7,876.65
1 USPG_109-003	Young Scientist	4,318.04	231.50	1,273.27	46.30	115.75	46.30	115.75
2 USPC_114-006	J & A Stoves	3,434.45	0.00	2,495.35	112.41	422.77	112.41	422.77
3 USPE_125-007	Jemco, Inc.	2,175.06	72.89	0.00	0.00	0.00	0.00	0.00
4 USPI_060-002	Advanced Electrical Machines, Inc.	1,955.00	70.62	1,106.38	0.00	0.00	0.00	0.00
5 USPB_175-009	Edale Limited	1,633.26	0.00	0.00	0.00	1,240.90	0.00	1,240.90
6 USPZ_263-004	Rhos Radio	1,469.99	0.00	0.00	0.00	0.00	0.00	0.00
7 USPG_114-005	The Light Gallery	1,451.76	654.10	(300.48)	104.59	209.89	104.59	209.89
8 USPZ_577-005	Binsley Electrical Wholesale	1,405.12	725.88	22.68	192.92	0.00	192.92	0.00
9 USPC_009-007	Baldor Electrical Carbon, Inc.	1,372.20	11.11	470.44	15.61	483.70	15.61	483.70
10 USPA_171-003	Arts Council of Wales	1,290.66	5.51	607.68	17.33	0.00	17.33	0.00
11 USPK_061-006	Leigh Lighting, Inc.	1,214.49	77.59	220.58	779.42	0.00	779.42	0.00
12 USPZ_510-003	Tgi Fridays Accounts Dept	1,150.50	445.42	0.00	219.97	0.00	219.97	0.00
13 USPE_139-004	S B Motors	1,106.55	35.73	0.00	17.71	3.22	17.71	3.22
14 USPE_114-008	Trench Electronics, Inc.	1,081.51	0.00	0.00	0.00	611.32	0.00	611.32
15 USPB_069-004	Duak to Dawn Security, Inc.	1,081.30	419.29	0.00	0.00	140.14	0.00	140.14
16 USPB_052-003	Seton Industries, Inc.	1,076.95	0.00	222.65	371.52	0.00	371.52	0.00

## Profit and Loss

Financial information including P&L, A/R and General Ledger

Account Name	Current Actual	Current Budget	YTD Actual	YTD Budget
D Sales	4,181,475.96	4,282,028.61	31,563,634.81	32,322,040.85
D Cost of Sales	2,608,882.23	2,648,482.44	18,661,301.53	19,053,189.45
Margin	1,572,594.00	1,633,546.09	12,902,333.00	13,268,850.00
D Manufacturing Recovery	96,715.21	87,565.35	977,206.11	1,202,474.52
D Other Income	5,712.14	(1,802.79)	50,517.50	(11,558.38)
D Expenses				
ASSOCIATION FEES	1,352.13	1,432.39	19,575.47	20,359.71
ADVERTISING	1,397.99	1,333.96	15,343.85	14,824.64
ANNUAL LEAVE	4,056.70	4,574.15	344,397.96	362,736.50
AUDIT & ACCOUNTANCY	16,544.17	16,155.38	115,723.53	113,004.03
BANK CHARGES	1,364.49	1,264.41	11,880.23	11,252.11
COMPUTER EXPENSES	11,631.15	11,517.44	87,415.47	86,067.79
CARTAGE & FREIGHT	89,860.83	87,537.24	651,270.94	635,436.18
CLEANING EXPENSES	7,227.73	7,069.74	66,498.91	65,136.51
CONSULTANTS	200,000.00	195,300.00	1,801,038.67	1,711,450.58
DEPRECIATION	47,423.04	53,445.77	428,265.72	482,655.47
ELECTRICITY & GAS	5,256.49	5,132.96	38,842.66	34,157.11
ENTERTAINING - Non Ded/No	3,105.85	3,500.29	27,940.22	31,488.63
EQUIPMENT HIRE	1,562.16	1,525.45	13,985.09	13,614.87

## Number of months Stock on Hand

Determine how many months' stock is on hand at current rate of sale

Code	Name	Inventory (Qty) on hand	Sales (Qty) 12 Months	Ave Monthly Usage (Qty) 12 month	Months Stock on Hand
TOTAL >>>		12,875,198.00	48,030,613.00	4,002,551.08	125.38
1 3	OSRAM SYLVANGA	5,973,215.00	22,211,568.00	1,850,964.00	3.23
2 14	BARTCO LIGHTING	1,830,662.00	7,778,225.00	648,185.42	2.82
3 13	GE INDUSTRIAL SYSTEM (TLC)	1,726,920.00	5,025,012.00	418,751.00	4.12
4 30	INVERTER SYSTEMS, INC.	885,360.00	4,469,540.00	372,461.67	2.38
5 11	INTENSE LIGHTING	611,401.00	2,174,857.00	181,238.08	3.37
6 8	LITHONGA LIGHTING	522,099.00	1,217,319.00	101,443.25	5.15
7 22	LIGHTING SERVICES INC	225,270.00	1,019,659.00	84,971.58	2.65
8 28	SPECTRUM LIGHTING	82,770.00	221,094.00	18,424.50	4.49
9 36	SHAPER LIGHTING	80,280.00	269,942.00	22,495.17	3.57
10 6	THE GENLYTE GROUP	75,390.00	211,171.00	17,597.58	4.28
11 27	MERCURY LIGHTING	73,650.00	287,396.00	23,949.67	3.08
12 7	AMERLUX LIGHTING	70,110.00	251,450.00	20,954.17	3.35
13 29	COLOR KINETICS, DISTRIBUTION	69,060.00	279,016.00	23,251.33	2.97
14 5	LITHONGA LIGHTING	63,060.00	236,082.00	19,673.50	3.21
15 24	ELBTPAR	42,690.00	160,274.00	13,356.17	3.20
16 13	ZUMTOBEL STAFF LIGHTING, INC.	41,340.00	205,123.00	17,093.58	2.42
17 25	SCOTT ARCHITECTURAL LIGHTING	39,600.00	164,181.00	13,681.75	2.89

# Dashboards and Scorecards

Adding to the ad-hoc analysis is a set of pre-defined dashboards, scorecards and quickstarts tailored to manufacturers and distributors that provide the insights to deliver results, instantly.

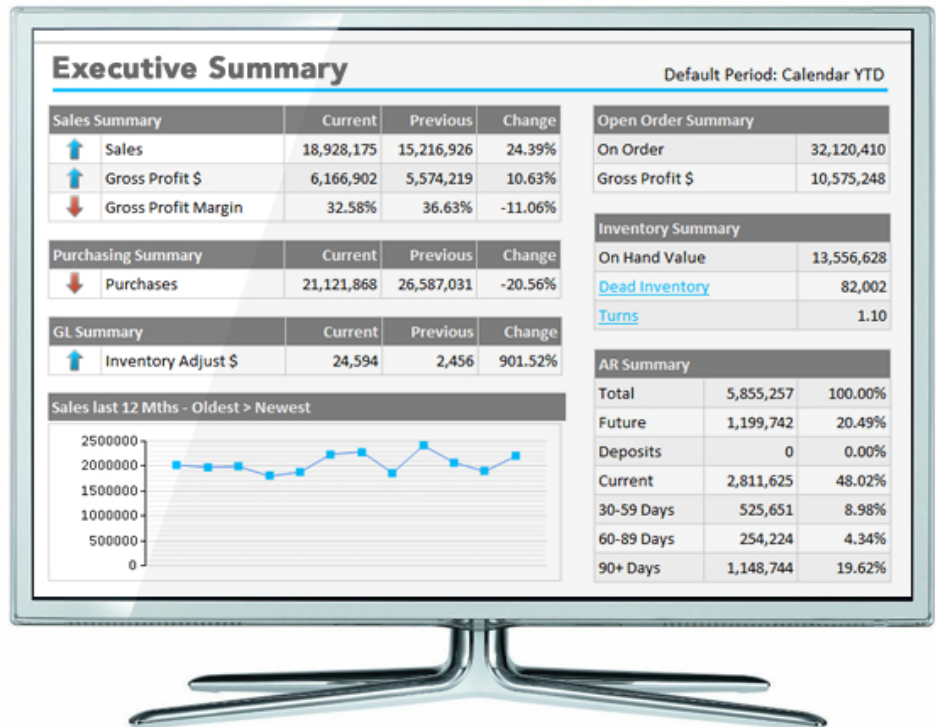


Of course creating your own dashboards is simple too – designed for non-technical users right from the start.



Customer, Vendor, Branch, Product and Sales rep Scorecards

Executive Summary



**Exceeds Expectations.**

“One of our remote workers once said "If you took away Phocas it would be like cutting off my left arm"

James Peddle, IT Manager, Young Electronics UK

“We've used Phocas to concentrate on declining customers and over the last twelve months have managed to increase the business done with these customers by over £100k in total.”

Steve Morris, Marketing Specialist, P&R Labpak UK

“Phocas is simply the best business tool I have seen in over 30 years of business. There is no doubt that it enables us to target opportunities sooner, identify threats sooner too and most importantly supports much better decision making.”

Andrew Kluge, CEO, Cosatto Ltd

“Using data from Phocas we put together a programme which led to an almost tripling of one customer's business with us over the following 6 weeks.”

Gary Rose, Finance Director, Parry Group, UK

“It allows me to grow my business and helps me smash my sales targets. This in turn earns me great commission month on month, so even my family loves Phocas!”

Tony Gerreli, Sales and Marketing Director  
Full Support Healthcare, UK

“Due to its exceptional flexibility, accuracy and ease of use it now plays a central role in our business, unlocking data for the sales force which had previously only been available in limited formats via our IT Department.”

Christopher Peart, Head of IT, Searchlight Limited

“We are overwhelmed with what Phocas can do for us! Without a doubt Phocas should pay for itself within 2-3 days of attacking business which has been highlighted!”

Lestrene Huckfield, Sales Manager, Lab 3, UK

“During a recent sales campaign using the Matrix tool, we more than doubled our sales of brake pads by identifying and focussing on customers who were previously buying brake calipers without pads.”

Keith Sedgley, Joint Managing Director,  
Roadlink International Limited

“It allows me to see our world anyway I want to: Units, turnover, profit, margins, growth, gaps, territories, products, product groups, ASP. Practically everything I need is just a click away..”

David Edwards, Sales & Clinical Director, AMBU Ltd

“The sales performance analysis is, without question, the simplest, yet most comprehensive tool on the market”

Derek Hoey, Operations Director, Ash and Lacy UK

# Frequently Asked Questions



**How much does Phocas cost?** Phocas is surprisingly affordable, and in most cases is rented for a small monthly amount.

**Are there any hidden costs?** No -all costs are outlined upfront. Our subscription model includes upgrades, technical support, account management and initial training.

**Can I cancel my subscription?** Yes. Customers on the subscription model can cancel at any time after the initial 6 month period without penalty. Three months' notice is required.

**What are my responsibilities?** You are responsible for providing the data exports from your existing (ERP) systems. Phocas can usually provide this service (at extra cost), if required.

**I am not technical. Will I be able to use Phocas?** Yes. Phocas was designed for non-technical users, right from the start. An hour or so training is all it takes to be fully operational on Phocas. In fact, Phocas is most often chosen for ease-of-use\*.

**Will Phocas be able to read the data in my ERP / CRM / back office system?** Yes – Phocas reads data from hundreds of ERP / CRM systems, either via flat file exports or direct database connections.

**My data comes from various sources. Is this OK?** Yes. Phocas is able to process data from multiple, disparate sources, including ERP, CRM, legacy systems, spreadsheets, databases and more.

**My company deals with very large amounts of data, including millions of transactions. Is Phocas able to deal with such data volumes?** Yes, this scenario is commonplace for Phocas.

**How long does a typical Phocas implementation take?** Phocas has been ranked as the fastest BI tool to implement, at 1.7 months\*. Within this time frame, there is usually only a few days' work, the rest comprised of meetings, set-up and gaining access to data.

**How do I access technical support?** Via phone or email during normal business hours. Technical support is included in the monthly subscription.

**Is Phocas available in the cloud?** Yes, ask us about our hosted cloud solutions.

**Can I access Phocas from my tablet or smartphone?** Yes, there are a number of deployment options to choose from.

\*Independent Barc BI Survey 10, released October 2011.  
([www.bisurvey.com](http://www.bisurvey.com))