

Phocas Partner Program.

Helping your customers feel good about data, together.

Why partner with Phocas?

Phocas partners with leading businesses in manufacturing, wholesale distribution, retail and construction to help organizations find ways to sell, buy, operate and service better.

With more than 30,000 users using Phocas every day, we're bringing people and data together to offer a better way to make data-driven decisions. Join us in this effort.

As a Phocas partner, you will gain access to industry knowledge, education and resources from a leading business planning and analytics software company to build a better business. Dedicated to making our software easy-to-use, the Phocas Partner Program helps you support your customers' goals of using data to make better, more strategic decisions for their business.



Phocas.

5 benefits that can help your business grow

1 Build a better business with expert insight and knowledge

Working with hundreds of wholesale distributors, manufacturers and retailers for more than 20 years gives us an edge in understanding the ERPs they use and what makes them tick. We use this expertise and knowledge to build a product designed specifically to meet these needs and challenges. The end result? A best-in-class data analytics solution that meets and anticipates their business needs.

2 Grow your business with an enhanced offering

Businesses of all sizes want to use data to see more deeply into ways to increase sales, reduce costs and eliminate guesswork, enabling more strategic decisions. Enhance your value to your customers and differentiate your offering by giving them the solution they need to grow.

Phocas' ease of use and capability to quickly and seamlessly drill into the underlying detail makes it easy for all users to explore their data, following their train of thought and asking and answering questions on the fly.

3 Pre-built solutions with easy customizations

From day one with Phocas, users get tracking and reporting on essential KPIs and metrics that are specific to role and industry — but our out-of-the-box solution can easily be customized to meet business' unique needs.

In fact, our solution is already integrated with 200+ datasources and has connectors for 30+ ERPs.

4 Comprehensive customer training and support

Make your customers more successful with Phocas' strong customer support and training. As part of the Phocas Partner Program, your customers can easily troubleshoot and maximize their investment with access to our support team, as well as free monthly webinar training series, annual user conference, online video tutorials and online forum.

5 Proven sales and marketing resources

In the Phocas Partner Program, our sales and marketing teams can support you to shorten your sales cycle and increase revenue opportunities. With access to an extensive content library with marketing and sales resources and for our referral partners, our dedicated sales and marketing experts collaborate and co-market with you to fast-track your success and revenue.

Industry recognition



Capterra Shortlist

Top-ranked software



FrontRunners

Top-ranked software



GetApp

Top-ranked software



G2 Crowd

Leader Winter 2023



BARC

The BI & Analytics Survey 23

Partner types

We have two types of partner arrangements:

1 Reseller partners:

Some of our partners choose to embed Phocas into their own application to enhance their core offering, which in many cases is an ERP system. They resell Phocas under their own brand.

2 Referral partners:

These partners prefer to recommend Phocas as an add-on solution. They typically introduce the Phocas team and solution as a “preferred supplier” to enhance the service and offering they provide to their customers. Phocas works with referral partners on co-branded campaigns.

Phocas at-a-glance

Phocas is an all-in-one business planning and analytics platform for companywide use. A single governed source of truth fed directly from your ERP, accounting, and other systems. Phocas solves the pains mid-market businesses have with gaining insights, reporting, tracking performance, managing sales teams, planning spend, managing cashflow, building budgets, forecasting and doing month end.

Core stats

300
employees

2900
customers

30K+
monthly active
users

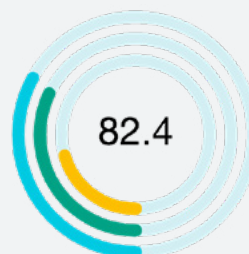
**Founded
in 2001**

**Private
company**

Proudly a certified B Corporation



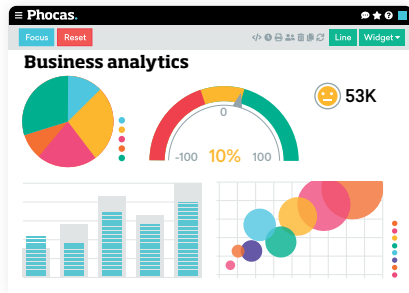
Phocas is amongst approximately 5100 companies worldwide to have this certification. This shows that we've met the highest standards of social and environmental impact.



- 82.4 Overall B Impact Score
- 80 Qualifies for B Corp Certification
- 50.9 Median Score for Ordinary Businesses

Phocas business planning and analytics solutions

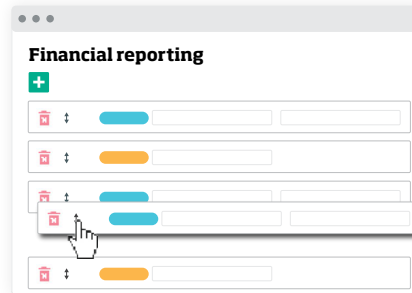
Phocas leverages your ERP data to improve reporting, analytics and planning capabilities



1

Analytics

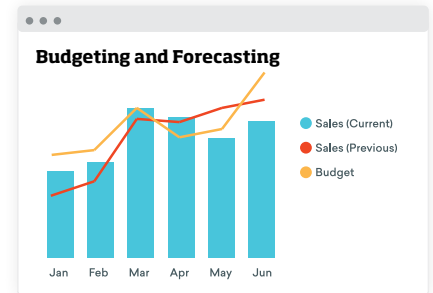
- Dashboards give the full picture
- Customer scorecards enrich conversations
- Improve individual or team performance with live tracking
- Chart or graph findings and share
- Designed to fit your industry and typical role-based KPIs
- Share datasets, views, reports and findings with others based on your access rules



2

Financial Statements

- Consolidate multiple general ledgers
- Integrate different data streams to measure performance
- Accelerate month-end close
- Drill down into transactional data
- Easily view cash & profit loss
- Customize financial statements for your audience
- Easily automate and share reports with colleagues



3

Budgeting and Forecasting

- Driver-based budgeting and non-financial budgeting
- Secure collaboration through workflows
- Audit any changes made
- Easily clone your budgets to re-forecast and simulate various models
- Single source of truth for your organization

*Functions may vary depending upon functionality of ERP application.

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Phocas.