

# Phocas roadmap.

## See what's new and what's coming



### Financial analysis

Fast analysis of financial datasets – all structured on accounting standards with fully controlled user-permission. View, chart and analyze it all: P&L, balance sheet, cashflow and trial balance.  
Coming soon: ad-hoc multi-level subtotalling



### Rebates by Phocas

Know and control your true margins after payable or receivable rebates. It's all about visibility, accuracy and automation. Coming soon: seasonality options, conditional rebates and near-miss observations.



### CRM / Collaboration

@mentions, alerts and notifications for better team collaboration. Coming soon: CRM seamlessly integrates inside the familiar Phocas user interface. Improved activity management and straightforward security / restrictions.



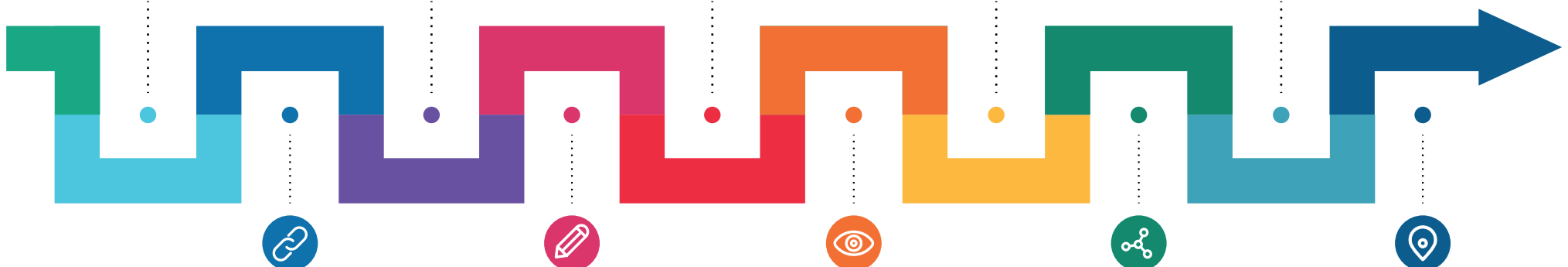
### Shopping Basket

Coming soon: uses machine learning to help grow orders. Use it to predict additional products and see the likelihood that a customer will buy recommended extra products based on all-customer buying patterns.



### AI Suite

Coming soon: harness the power of artificial intelligence to either make stuff you're doing now easier, like stock and warehouse management, cashflow predictions and at risk customer analysis. Or discover insights into your business that you've never dreamt of!



### Company-wide analytics solutions

Purchasing, sales, inventory, finance databases pre-configured for 20+ ERPs, CRMs and other datasources.

### Usability features

'Expand / contract' reports nested within a single grid. Mode improvements: special offsets (1st day of the month). Coming soon: better subscription options to get favorites/reports delivered to your inbox in a new, visually appealing format.

### Visualizations

An ever-improving choice of visualizations for dashboards and scorecards: graphs like waterfall charts – a terrific way to see variance between previous and current periods. Coming soon: pareto chart, tree map, in-line visualizations and more.

### Sharing dashboards

View-only live dashboards can be shared outside your organization and dashboard-widgets can be embedded in websites and applications.

### Geomapping

Improved geocoding with Google accuracy. Coming soon: geomapping speed improvements.



### Platform

Delivery options including SaaS and on-premise, plus ongoing performance, speed, scalability and security developments.



### Database Designer

Customers, partners and trial users load data into Phocas using intelligent mapping for fast and easy set up.



### Sync

Continuous updates to the Sync tool. Coming soon: access to datasources for cloud-to-cloud sync to facilitate efficient and accurate data synchronization.