

Sage X3

previously

**Sage Enterprise
Management**

V7 – V12

Summary of
Changes



SWK
TECHNOLOGIES



Sage X3 V7/8

A Completely New Web Interface

KEY BENEFITS

Simpler new and modern web interface, supporting multiple web browsers. Intuitive browsing functions like hyperlinks, scrolling pages, and powerful searches

Helpful documents, videos, and tutorials in the new Online Help Center

Flexible personalize both users and roles with authoring mode to tailor the software to the unique needs and tasks of users



What's new?

Most important
new features and
improvements

Performance

- Access online information from multiple devices
- Enhanced Microsoft Office Integration including a toolbar for Word, Excel and PowerPoint
- New Online Help Center
- Customizable dashboards, with graphical views and drag and drop screen personalization features

Mobile

- Version 7 is inherently a mobile solution with a particular focus on tablets and smartphones

Functional Improvements

- Enhanced Traceability: quote to cash, order to payment
- Sales document personalization (delivery & returns)
- Flexibility in sales kits (options and variants)
- Flexible settings in legislations
- Better control of inter-company transactions
- Flexible management of warehouse locations
- Enhanced automation of recurring invoices

1. New Financial Features

Inter-Company

- Ability to import inter-company journal entries, and generate separate journals in the source and target companies
-

Human Resources

- Full compatibility with of Sage HR Management release 7.1
-

Multi-Legislation

- Improvement of the management of international companies by increasing the number of legislations that can be managed together into the same endpoint, up to 99
-

Fixed Assets

- More control and consistency between fixed assets and other areas within the solution so that it is possible to allow or disallow the creation of fixed asset expenses
-

Accounting

- Functionality improvements including currency conversion options, recurring AP/AR invoices, multi-company processes, and more

2. New Sales Features

Bill of Lading

The Bill of Lading (BOL) establishes the terms of a contract between a shipper and a transportation company. It serves as a document of title, a contract of carriage and a receipt for goods. This new function allows for the creation and printing of a Bill Of Lading.



New module

Financial management | Return Status on Deliveries

Return status indicator at the delivery header (not returned, partially returned, returned) managed previously for for-loan deliveries, has been extended to all types of delivery. This indicator enables users to track returns more easily at the transaction entry level as well as inquiries and reports.



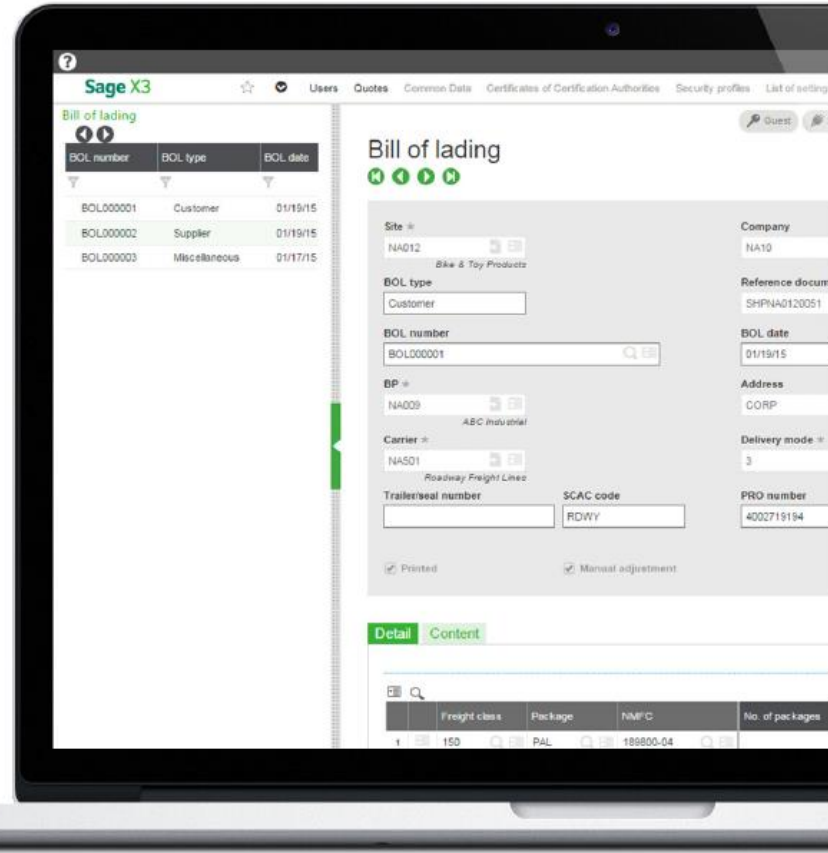
New in Financial Management

Financial management | Sales Credit Note

New control in sales credit notes that prevents creation of credit notes exceeding amounts/quantities of the origin invoice. This control is applied on three values (No Control, Blocking or not) at the lines quantities, the lines amounts and invoicing elements amounts. There is an additional theoretical control that checks the logical distribution of invoicing elements on credit notes (warning control) and another general parameter that defines the authorized threshold.



New in Financial Management



3. New Purchasing Features

Purchase Request

Ability to generate and modify the quantities in a purchase order from a purchase request.

Minimum Order Amount

New parameter added to manage the behavior of the order minimum amount control (“block”, “warning” or “no control”).

Back-to-Back Orders | Purchase Pricing

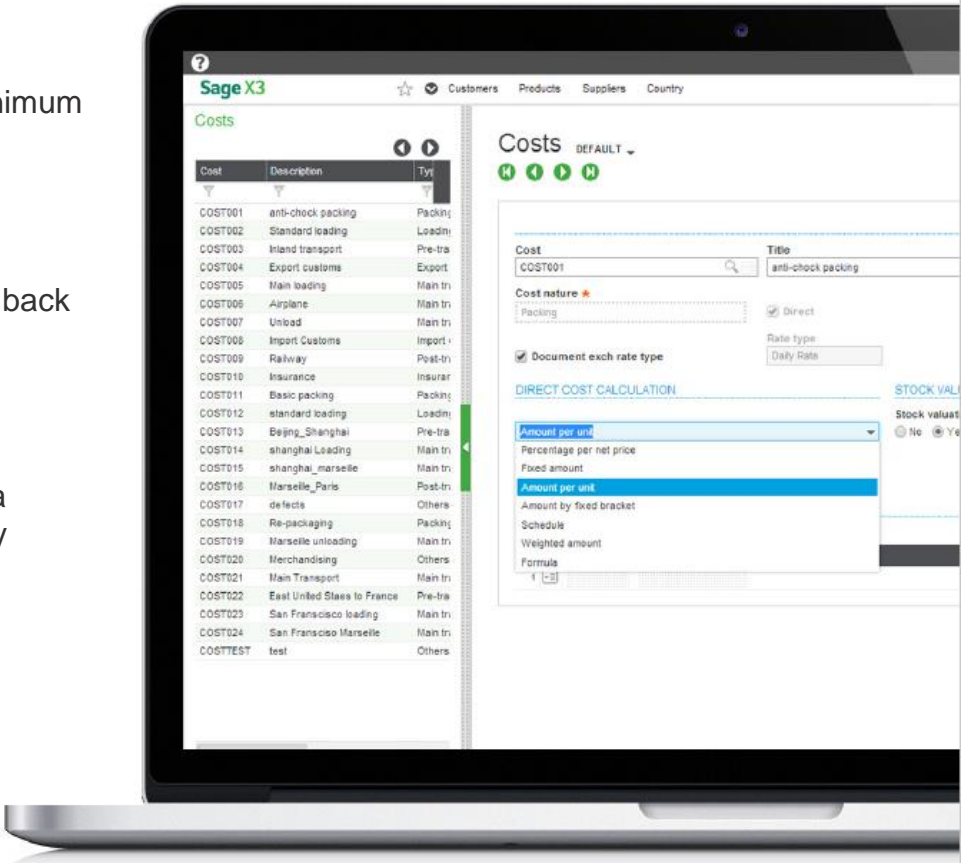
New parameter added for purchase price existence for back to back orders (“control” or “no control”).

Purchase Return Management

New parameter added which allows you to see whether or not a receipt was returned in the Purchase Invoice (“returned quantity invoicing”).



Changes to Purchasing Management



4. New Inventory Features

Packing Management

New ability to exclude products for packing management for products not managed in stock.



New Inventory Feature

Inventory Management | Stock Shortage Adjustments

Improvement to adjustment's view, reordering columns, adding new column "available qty" and highlighting situation (Red = No Stock available, Green = Partial stock available, Blue = Stock available).



New in Supply Chain Management

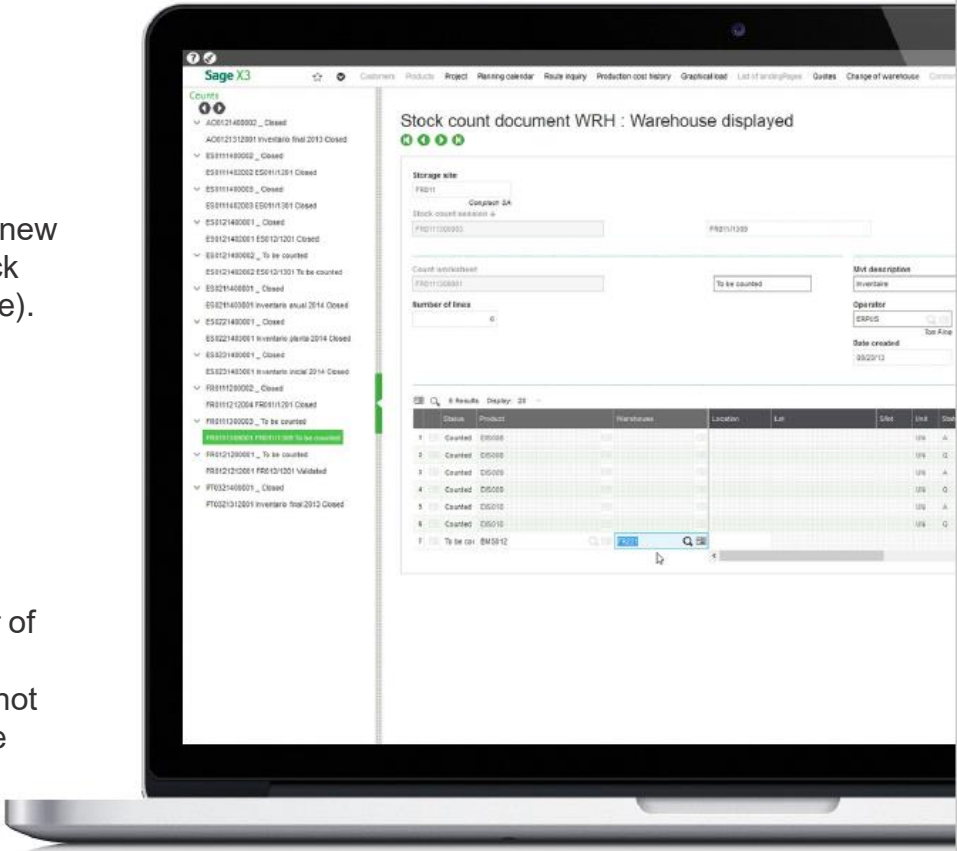
Stock Management | Use By Date

Two available types of use by date (UBD):

- In days: New field "UBD lead time" allows knowing the number of days before the deadline to sell or deliver a product.
- Per customer: According to the customers' needs, the UBD is not same for all, some customers may want a longer time to sell the product before the expiration date.



New in Stock Management



5. New Manufacturing Features

Graphical Scheduler

Graphical scheduler for manufacturing planning and optimization can now be launched from a web browser.

Manufacturing Management | Weighing Scales

Improved integration of barcode formats for re-control function as part of the weighing by product and work order. This function defines different areas of the barcode to read in order to do the rechecking. The information can be found through: Component Code, Batch Code and Sub-lot Code. In addition, the weighing scales interface can now be launched from a web browser.



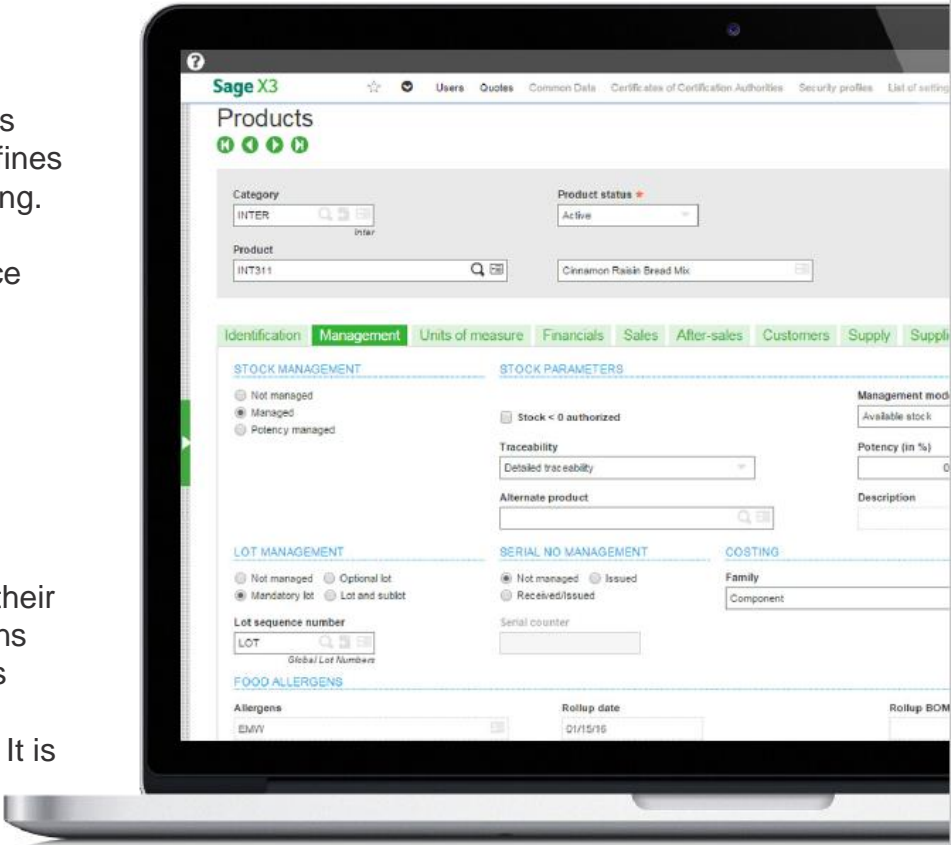
New in Manufacturing

Quality Control | Allergens

Food manufacturers must comply with the law by identifying on their product labels the food source of any ingredient that is or contains protein from one of the eight foods or food groups. The allergens function allows tracking of manufactured products whose components have been identified with one of the food allergens. It is used in the enterprise planning to filter by allergens criteria.



New in Quality Control



Sage X3 V9

New features supporting requirements in distribution and manufacturing industries

Financial
management



Supply chain
management



Production
management

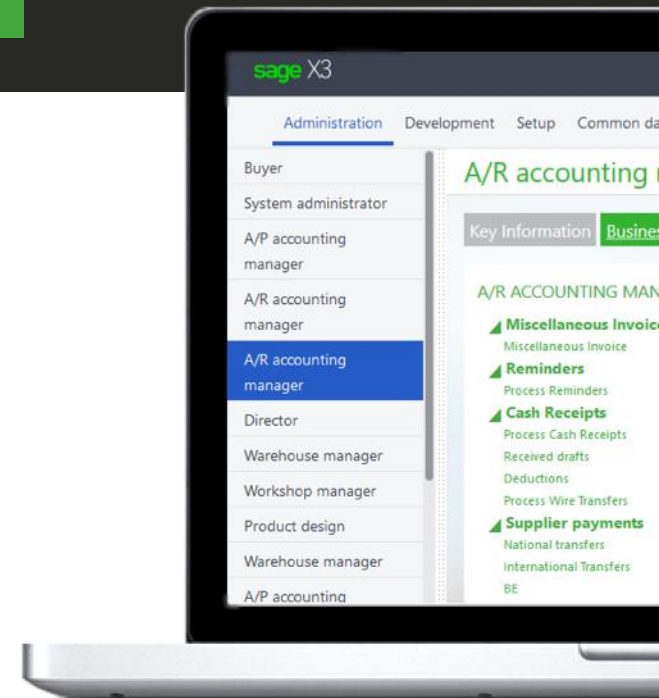


KEY BENEFITS

Accelerating performance throughout the entire business

Scalable multi-tier architecture ensures virtually unlimited capacity

Familiar web browser look and feel. With an intuitive web user interface that users can easily personalize to work the way you do



What's new?

New features and improvements

Mobile

A more compatible and redesigned user interface for mobile devices. Designed to be responsive to different devices like smart phones, tablets and mini tablets. Improved screen layouts and simplified navigation for all mobile users. Offline capabilities have been added to the new web mobile client. In addition, a new mobile app has been added for tracking and managing fixed assets.



New Enhanced Mobile

Logistics management | Distribution

New features in the management of transportation of goods in the purchasing process, giving visibility to the quantities receivable, tracking the goods in transport and the actual arrival date of product. The following functionality has been added or enhanced; management of suppliers, containers and shipments, container capacities, free freight levels, minimum or maximum orders, freight cost optimization based on purchasing order cost or container capacity. All to create better efficiencies on order costs and delivery dates.



New in Logistics Management

Financial management | Sales

The following features have been added: document types for sales quotes, credit and price control in inter-site transactions, credit level control for deliveries, tax control on sales documents, inter-site sales order prices, intrastate subcontracting flow improvements and the ability to put manual orders on hold.



New in Financial Management

What's new?

New features and improvements

New Modules

Sage X3 | version 9

Manufacturing Management | Change Control

Change Control Management (CCM) supports the management of product design, release and changes and is an important part of key business process such as manufacturing or project management. CCM is managed in six steps; Create a change request (CR), Review impact across all transactions, Plan the changes, Implement, Complete the change request and close the change request.



New in Manufacturing Management

Supply Chain Management | Version Control

Version Management can be supported by CCM or managed alone. It can be used to track Products and BOMs at multi-levels. Lot management must be set up on the product in order to use versioning. Major version is tracked with all movements. It is available in all sales and purchase documents, transactions and in the manufacturing process.



New in Manufacturing Management

Financial Management | Factoring

Automates the end-to end factoring process for companies that outsource their payment collections from their customers. Included are two types of factoring: recourse factoring where the company keeps the risk and no recourse factoring where the factor company assumes the financial risk based on assignment. Factoring is associated to invoices and the type of contract triggers the business rules.



New in Financial Management

What's new?

New features and improvements

New Modules

Other functional improvements

Sage X3 | version 9

Update Functionality

- One-click process for applying patches
 - Drag and drop functionality for ZIP files
-

Customer Service

- New button to send email directly from the 'Service Requests' or 'Service Responses' in the Customer Service /Helpdesk function
-

Crystal Reports Development

- Copy your Crystal reports from the server to a local machine with the Connector
 - Ability to revert back to previous versions
 - Status and user tracking to define if the report can be shared with others
 - The ability to upload the report back to the server
-

User Interface

- Breadcrumb and new keyboard shortcuts
- Warning of lost changes when navigating to another page before saving changes
- Ability to choose a different theme to support use, such as, in the use of a projector
- Right panel was adjusted for vertical space between items to improve the readability of those screens

Sage X3 V11

A better way to manage the entire business, at a lower cost and on a global scale

Financial
management



Supply chain
management



Production
management

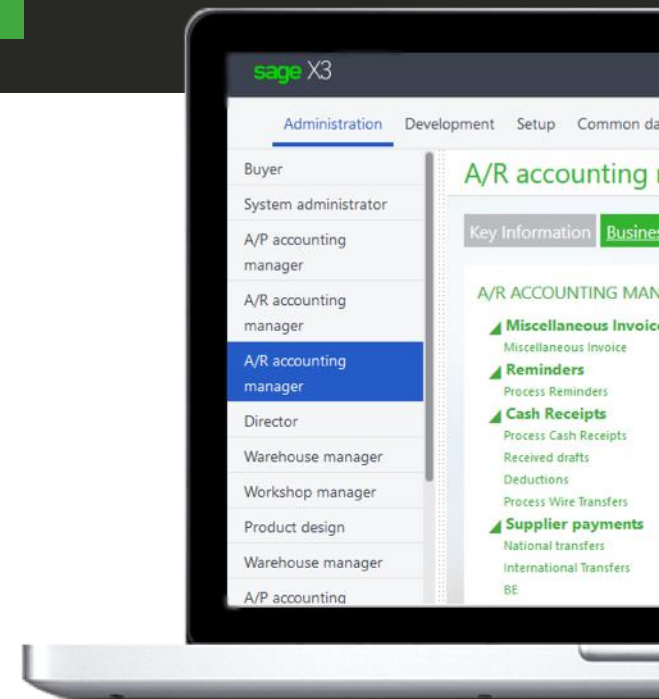


KEY BENEFITS

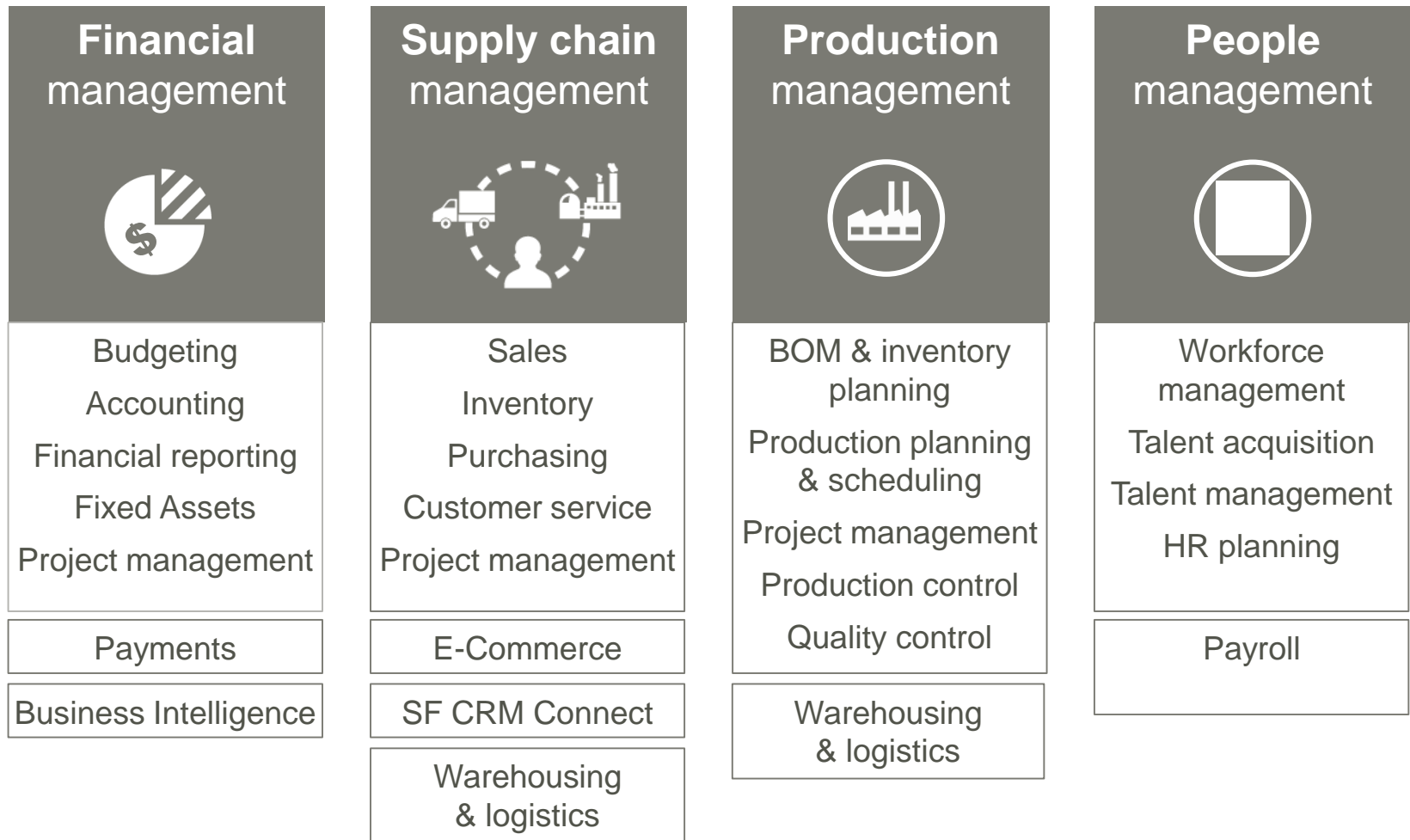
Faster process cycle time, faster inventory turns, faster customer response time, faster insights into costs and performance

Simpler management of distributed operations and simpler IT management

Flexible capacity, customization, configuration and deployment options, in the cloud or on premises



Sage Enterprise Cloud Solutions



What's new?

Most important
new features and
improvements

Project management

Manage all aspects of a project across financial, distribution and/or manufacturing processes, from quoting to planning resources and material, tracking costs and schedule, invoicing and analyzing profits.



Production management | Production scheduler

Optimize production cycles and control lead times with more flexible graphical production planning and scheduling capabilities.



Financial management | Automated bank statements

Improve the efficiency of the financial process by automatically generating the transactions matching open items or unbalanced operations when importing bank statements (MT940)



What's new?

Most important
new features and
improvements

New integrations

Supply Chain Management | e-commerce

Build or customize a comprehensive webstore within days, and manage catalogs, pricing, inventory, customers, and all transactions as part of the Sage X3 core supply chain management processes.



New in Supply Chain Management

Supply Chain Management | CRM

Synchronize customer records between Salesforce CRM and Sage X3, and display customer orders in Salesforce using the new Sage X3 Salesforce CRM Connector.



New in Supply Chain Management

Financial Management | Financial Reporting

Easily design reports, with intuitive Excel-based reporting capabilities integrated with Sage X3 financial management and automate the running and distribution of reports to teams or individuals.



New in Financial Management

What's new?

Most important
new features and
improvements

New integrations

Other functional
improvements

Supply Chain Management

- Optimize container capacity for shipments.
- Attach & track documents associated with receiving goods.
- Easily customize steps to track during receiving process.
- Easily update costs associated with purchasing on shipment and view shipment cost totals.
- Create complementary invoice from shipments.

Production Management

- Enable shop floor tracking by team, available in ADC.

Financial Management

- Accelerate closing with real-time inter-company consolidation process, at the right level of aggregation.
- Accelerate currency conversion by running conversions in one run, at the balance sheet level (vs. transaction level).
- Fast entry booking: accelerate journal and AP/AR entries.
- Automate reminder campaigns based on amounts or intervals.
- Enable blocking sales transactions based on credit rating.

What's new?

Most important
new features and
improvements

New integrations

Other functional
improvements

New complementary
solutions

Sage X3 | version 11

Supply Chain Management | Warehouse Edge

Extend Sage X3 with best-in-class warehouse management capabilities from High Jump – Warehouse Edge, to optimize all physical flows in the warehouse, from receipts to shipments.

Analytics | Sage X3 Data Management and Analytics

Integrate, migrate and manage data across platforms, and get consistent insights from multiple sources. Sage X3 Data Management provides users with a powerful data warehouse for managing information from any source effectively and offers built-in data models to simplify data migration and reporting.

Industry solutions | Procession

Extend the core Sage X3 capabilities for the Food & Beverage industry, with a cohesive solution to manage functionality in the areas of R&D formulation, regulatory control, quality control and recipe management.

Sage X3 V12

A better way to manage the entire business, at a lower cost and on a global scale

**Financial
management**



**Supply chain
management**



**Production
management**

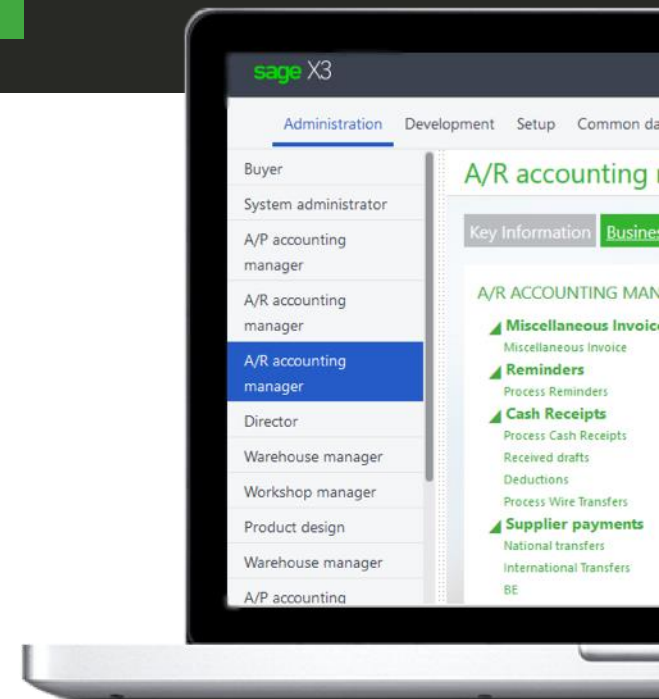


KEY BENEFITS

User Interface newly designed site map and easier access to user profile

Compliance for GDPR and many changes for France and other countries regarding compliancy. MTD for UK

Control Management both within Distribution areas and for Manufacturing



What's new?

New features and improvements

User Interface

An improved site map replaces the drop-down top menus. Breadcrumbs with access have been added. Ease of use enhancements to user profiles and language preferences



Mobile Enhancements

Optimize of mobile access through a new working copy mode feature that allows real time checking to validation on each field while entering data. Better use of space and sections on the mobile interface

Tax Calculations

Bypass Avalara Tax calculations for unsupported countries by the addition of a parameter switch. Can be specific to each country where the connector is not required



What's new?

New features and improvements

Financial Improvements

Sage X3 | version 12

Financial management | Automated bank statements

New reconciliation workflow process that copies the bank statement import to a bank reconciliation table. Ability to match open items from different statement currencies has been added



New in Bank Statements

Financial Management | Multi-currency

Manually enter a corrected currency rate during bank operations. A new rate field has been added to transaction entries in Accounts Payable and Accounts Receivable



New in Multi-currency Management

Financial Management | Financial Reporting

Addition of Supplier and Payment reports for open or paid invoices, cash requirements report for AP invoices sorted by earliest due date, customer statement by legislation, pivot date for aged balance report and two new financial reports



New in Financial Reporting

What's new?

New features and improvements

Financial Improvements

Distribution Improvements

Distribution Management | New Functionality

- Ability to block back-to-back orders
- View Stock Availability and First Date Material Availability on Sales Order Lines
- Use the Action icon at the Ordered quantity and Quantity to allocate fields, to view, Stock by site and Projected stock
- Stock valuation improvements to reconcile to GL
- Easily identify Stock Valuation issues within a reconciliation period, by generating a point-in-time valuation
- New pre-receipt functionality for landed cost
 - Miscellaneous receipts/issues flow, the site's selection window shows only storage sites
 - Inter-sites receipts flow, the destination location is now available directly on the lines
 - Enhancement to manage suppliers at the product-site level
 - Track various products attached to a License Plate and follow all internal stock movements of the License Plate



New in Supply Chain Management

What's new?

New features and improvements

Financial Improvements

Distribution Improvements

Manufacturing Improvements

Sage X3 | version 12

Work Order Management | **WO Versioning**

Addition of authorized on-the-fly changes to Work Orders with product versioning. Allowing addition of unexpected materials, the exclusion of materials and audit controls with reason codes



New in Manufacturing

Analytics | **Cost Movement Analytics**

Tracking and reporting cost tier methods for FIFO and Average Cost movements by delivery records based on specific dates. Standard cost controls have been added

CAPA | **Non-Conformance Enhancement**

Quality management process for reacting to incidents or Non-conformances, assuring that the appropriate corrective or preventive actions are taken. The additional setup of 4 roles enables the process; QA Manager, Planner, Actioner and Approver (not mandatory)



CAPA Management



SWK
TECHNOLOGIES

CONTACT US TO LEARN MORE
info@swktech.com

www.swktech.com