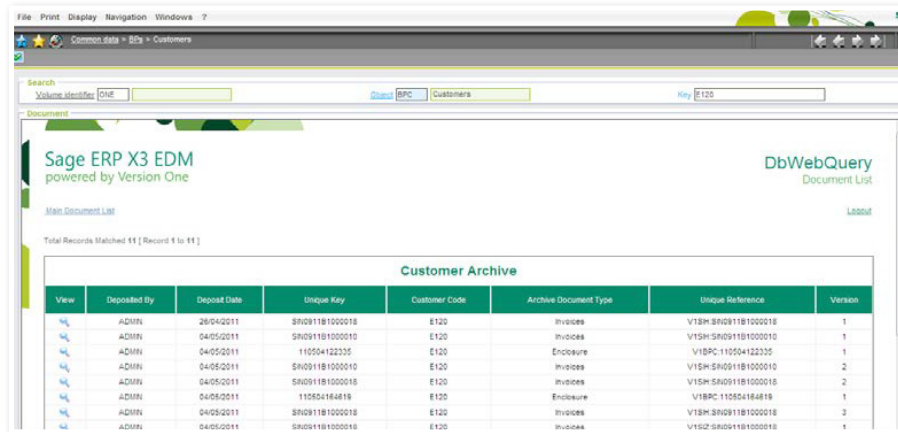# Sage ERP X3

## What's new in Sage ERP X3 6.5 ?

Sage ERP X3 6.5 improves productivity, simplifies installation, and offers you new specialized features through cloud services. Enhancements include Electronic Document Management (EDM) and Electronic Document Distribution (EDD) which enable you to efficiently capture, archive, email and fax documents. Extended Fixed Asset functionality gives you the ability to import and track the movement of your assets. Additional enhancements include improved efficiencies for your financial, sales and inventory modules. To streamline your upgrades many features that were previously provided as North American add-ons are now incorporated into the core product. New Cloud Services include Sage Sales Tax which provides the ability to automatically apply accurate up-to-date charges to your customer orders, and Sage ERP X3 Shipping which efficiently and cost-effectively manages the delivery of goods to your customers. Sage Advanced Customer Relationship Management (CRM) solutions help to establish a positive, consistent experience when your customers interact with your company, and the ability to dynamically link your processes, information, workflows, and communication channels.

### Electronic Document Management (EDM)

New document management functionality extends the reach of Sage ERP X3 beyond system-generated documents to provide more control over document flow, increase archiving efficiencies, and streamline document distribution by email or fax. An integrated feature of Sage ERP X3 6.5, EDM allows management of all your documents within your normal ERP workflow without the need to connect to a third party application.



Work collaboratively and easily capture, view, edit, and attach all documents related to your Sage ERP X3 records. When you receive documents, you can efficiently scan them using OCR (Optical Character Recognition) so they are added to the system, indexed using document numbers and key words found in the document, and automatically associated to the appropriate records. Once stored, efficiently search and distribute any archived document along with the documents that are generated by your system. Going green with EDM saves on real costs such as postage, stationary, and storage space and reduces the profit-killing inefficiencies of filing and retrieving hard copies. Sage ERP X3 Electronic Document Delivery (EDD) is also available which includes the ability to automatically email or fax system-generated documents. When authorized to do so, Non-ERP users also have the ability to drag and drop documents into the system using an EDM folder on their desktop. The new EDM and EDD components are: Faxing, eMailing, OCR, Barcode, Archiving and Unified Search.

## BENEFITS

- Capture, distribute, archive and retrieve documents using time-saving efficient Electronic Document Management and Distribution (EDM and EDD)

- Reduce risks receiving goods using overage and underage tolerances

- Increase customer loyalty and stay competitive leveraging early payment terms discounts

- Automatically display notes to specific users for special instructions, promos, and links to photos, websites, and more

- Reap tax benefits by efficiently applying depreciation and tracking the movement of assets

- Improve productivity and save money using the new autofill and autocorrect Postal Code enhancements

- Make informed decisions with the new Sage Intelligence Financial Reporting distribution and reporting tree capabilities

- Streamline your tax reporting process using sales tax reporting, 1099 and 1096 processing

- Accelerate growth and stay connected with Sage CRM enhancements

- Efficiently and cost effectively streamline your shipping and rate shopping process

## Postal Code Enhancements

Enhancements in Sage ERP X3 6.5 reduce your mailing costs by easily importing postal code lists and correct existing codes. With new autocorrect and auto fill features that automatically apply the correct City and State information, you'll save data entry time when keying in postal codes. Another money saving option when you're mass mailing allows you to use characters beyond the traditional five character postal code format, ZIP+4 codes.

## Product Record Improvements

New features in 6.5 allow you to add an unlimited amount of notes to the items you stock or sell, specify where those notes are displayed, and for how long, using effective and expiration dates. Using note categorization multiple notes that you attach for an item can be viewed by different users. Add one note for the materials management group to communicate important information on product availability, and another note on the same item for a promotion about complimentary products or potential substitutes. Increase sales by adding item popup notes in Order Entry for a seasonal item you have on sale for a limited time, so salespeople have that timely promotion visibility when they're interacting with your customers.





In addition to notes, 6.5 will also save your team valuable time when you use item links for convenient access to associated information. Links to an image, available options, or an MSDS improves customer service and adds clarity, especially when similar items are offered. Providing answers to anticipated questions can help you avoid shipment of the wrong product and reduce your percentage of returns.

## Stock Movement Improvements

New Three Way Matching enhancements empower you with more refined control over how much your receipts and invoices can deviate from their original purchase order. Settings allow you to be as precise as desired with the tolerances that are established, such as the quantity to exceed or shortage amount, by count, or percentages. Allow overage or underage for your invoices, by unit cost amount or by line item. Display or block warnings, and depending on security rights, certain employees can move past the warning and accept a receipt, invoice, or order even when they fall outside of your set tolerances. The more your industry has item cost fluctuation, and you deal with a large quantity of items from each of your suppliers, the more you'll appreciate these enhancements.

## Accounts Payable and Accounts Receivable Terms Discounts

Increase customer loyalty and be more competitive by using the new Accounts Payable (AP) and Accounts Receivable (AR) Terms Discounts functionality. These enhancements provide you with the ability to apply early payment discounts, such as 2% 10 Net 30, to both AP and AR using a specified date range, or to always apply the discount. You can also set discounts based on the number of allowance days, or the grace period, that you want to continue to allow the discount to be taken. You have the option to discount the total amount including, or excluding, any additional charges such as freight and sales tax.

## Sales Order Manual Hold

Does your team ever waste time tracking down why a Sales Order was placed on hold? To answer those questions, new user-defined Reason Codes, such as Late Payer, can now be added. Hold Reason names can also help communicate if you want your team to allocate stock to that order. Security settings will allow you to designate some of your team members with the ability to intercede and override the system hold settings. If a situation arises such as a key customer placing an abnormal order that puts them close to their credit limit, Manual Order Holds allows you to validate the order before it's processed and shipped.

## Pricing and Restrictions by State Code

This 6.5 enhancement automatically applies State restrictions for certain goods you may sell, such as alcohol or firearms, and accommodates for age restrictions. Once you establish the appropriate restrictions you'll be able to operate with confidence that Sage ERP X3 6.5 will automatically apply and use them appropriately for each State.

## Tax Compliance Improvements

Several tax compliance improvements are included in the 6.5 release, including Sales Tax Reports and 1099 processing.



## Sales Tax Reports

If you do business in any US state except for Alaska, Delaware, Montana, New Hampshire, and Oregon, you'll appreciate the Sales Tax reporting enhancements in 6.5. Streamline and improve your collection setup, and payment of taxes due, and more efficiently deal with the complexities you face when selling from multiple locations and from online shopping carts. Conveniently and automatically generate tax reports, especially for companies selling online who often face more tax reporting challenges than single brick and mortar retailers.

## 1099 Processing Enhancements

The 1099 IRS form and 1096 processing enhancements in 6.5 will help you simplify the often complex legal reporting requirement for non-employee and subcontractors that you pay throughout the year. These 1099-MISC, 1099-INT, and 1099-DIV new features will track supplier payments that you've designated as 1099 reportable, and allow you to export your 1099 and 1096 data to Microsoft Excel®. Use this exported file to conveniently eFile using a third party vendor, or print 1099-MISC forms directly from Sage ERP X3.



## Fixed Assets Enhancements

Sage ERP X3 6.5 includes enhancements to Fixed Assets, which has been extended to include the capacity to import and track the movement of your assets. Control the factors that determine your asset value by manually adjusting physical elements or attributes, and modify the depreciation method. Before you commit a depreciation of assets to your system, you can now simulate it to ensure you get the desired results. If not, you have the option to modify what you simulated. For your assets that were disposed of during the year and partially depreciated, automatically calculate and close out that asset using an adjusted end date. Additional enhancements provide you with more flexibility to override the capitalization amount of an asset to allow you to include any additional expenses incurred. Use new Fixed Assets filters to easily narrow your search and focus on categories or specific groups of assets.
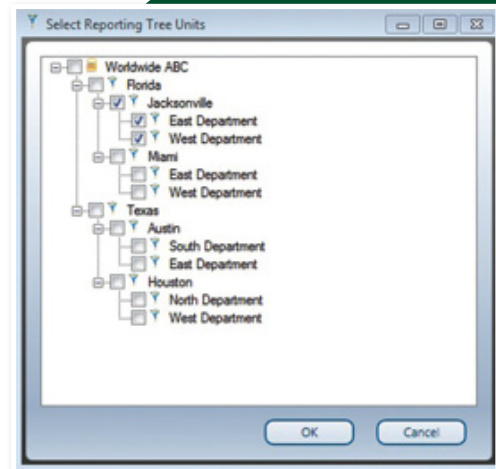
# Sage Intelligence
## Financial Reporting for Sage ERP X3 Enhancements

Several Sage Intelligence features are included in the Sage ERP X3 6.5 release. The standard out-of-the-box reports (Financial Report, Financial Report by Company, Analytical Budget Report, and Analytical Report) cover both your standard financial statement and analytical reporting requirements. The Report Designer now includes Reporting Trees and Report Distribution capabilities.
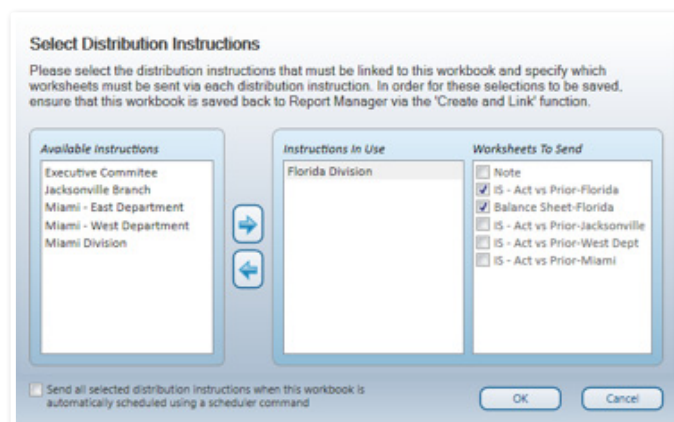
### Reporting Trees

A reporting tree allows you to easily model very sophisticated reporting structures, and view your organization in many different ways. The flexibility in Sage Intelligence - Financial Reporting accommodates any level of corporate hierarchies and tree units, so you can follow your organizational chart and model how the lower units report to increasingly higher units. Designate individual departments using your General Ledger, and establish higher-level, summary units that combine information from other reporting units. You can easily add or change reporting units without requiring a change to your financial data. After you save a Reporting Tree, link it to one or more of your Report Designer Layouts.

### Report Distribution

Improve your workflow and speed up business processes by automating report delivery and distribution using the new Intelligence Report Distribution. A powerful feature that saves you time and effort, it automatically sends reports to a file, FTP site, or email in a number of standard formats. Distribution is ideal for sending reports out to line managers, providing corporate management with tailored reports, or providing information to external businesses such as banks holding a line of credit. Choose the reports you want to distribute, who will receive them, and customize each email format using your existing Microsoft® Outlook profile and address book.

Features include the ability to customize each email format, utilizing your existing outlook profiles and address books, or to specify a SMTP or Exchange server. You can setup the same report to be distributed to different destinations. And, you can set up conditional distribution lists based on the content of the report.
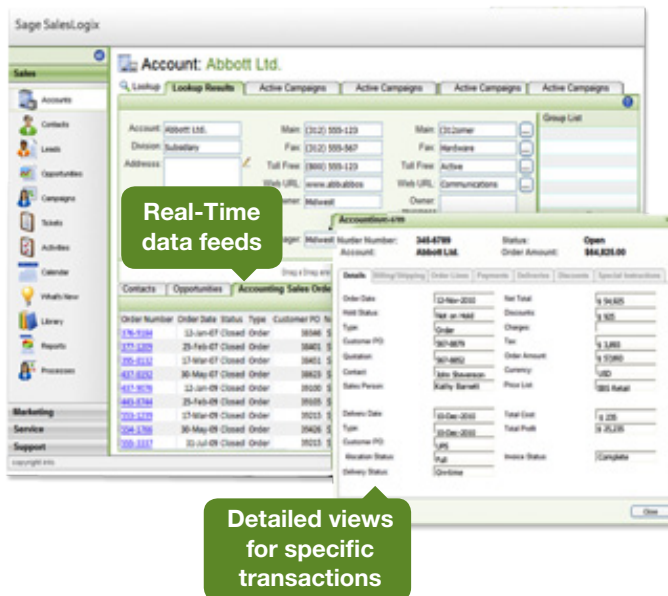
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# Customer Relationship Management

Growing a business in today's economy can be challenging. To help ensure your success, in addition to the built-in Customer Service functionality, new Sage ERP X3 6.5 Advanced Customer Relationship Management (CRM) functionality includes two solutions - Sage CRM and Sage SalesLogix. Linking ERP and CRM together create new ways to increase your customer satisfaction, improve productivity with better communication across your departments, save you time by managing all aspects of your business with a single solution, and can provide you a better return on investment in your sales, marketing, and customer service activities. Using these powerful solutions together offers you the advantage of having a true single view of your customer.

The integrations will utilize your Sales Order and Quote screens, and will provide two-way syncing on your customer orders, and one-way syncing on your items. For example, if orders are created in SalesLogix, they will sync back to Sage ERP X3 6.5.

## Sage CRM

Sage CRM for Sage ERP X3 6.5 will centralize all your information about external marketing, manage your sales pipeline, automate your customer service, track information about your customers, as well as create dashboards and reports on your data. Using CRM with ERP enables your employees to have access to all the information they need real-time, to provide your customers with exceptional service, without delays. Integrated CRM and ERP also provides the ability to create seamless workflows between your front and back office, sharing access to your key customer information leads to better organizational efficiency, greater order accuracy, and improved communication between your departments—and with customers.



**Real-Time data feeds**

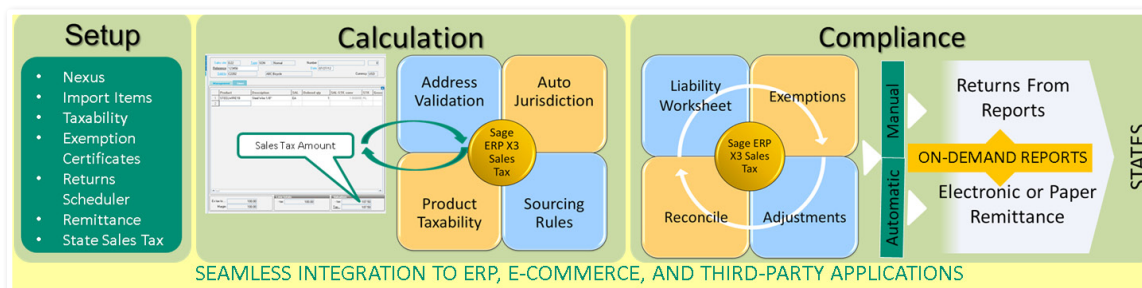**Detailed views for specific transactions**

## Sage SalesLogix

Sage SalesLogix for Sage ERP X3 provides a complete view of customer interactions across sales, marketing, and customer service and support teams, so they can collaborate and respond promptly and knowledgeably to customer inquiries and sales opportunities. Businesses utilize SalesLogix to acquire, retain, and develop profitable relationships. The modular design enables companies to combine sales force automation, marketing campaigns, customer relationship management, and customer service management to build the system they need using either the online or the on premise versions of the product.

# Cloud Services

The following Connected Services provide Sage ERP X3 6.5 customers with additional specialized features and functionality.



### Sales Tax Service

Sage ERP X3 Sales Tax is a web-based solution that automatically performs address validation, sales tax jurisdiction research, and rate calculation on the fly. Access a professionally maintained tax engine over a secure internet connection to apply address, jurisdiction, and rate information to every transaction—within the same order-entry or customer set-up screen typically used. The integration is seamless with Sage ERP X3 and all sales tax jurisdictions in the USA and Canada are covered.



### Sage ERP X3 Shipping

Sage ERP X3 Shipping is expected to be available soon after 6.5. A web-based system, Shipping efficiently manages the process using the best rates to get products into the hands of customers quickly. It will help streamline shipping activities for all parcel carriers, Truck Load and Less Than Truckload (LTL) shipments, and Company Vehicles. Offering easy and secure methods to deploy quickly either on-premise or in the cloud, Shipping manages your shipping processes all the way to the printed labels, and will originate shipments from the USA or Canada.