



Introduction to Sage ERP X3 for distribution

Feature Highlights



RETAIL
DISTRIBUTION



WHOLESALE
DISTRIBUTION



TRANSPORTATION
AND LOGISTICS



Top ERP capabilities identified by distributors



1 COMPETE GLOBALLY AND TRADE INTERNATIONALLY

2 MANAGE OUTSOURCED AND SUBCONTRACTED RELATIONSHIPS

3 OPTIMIZE AND MANAGE THE SUPPLY CHAIN

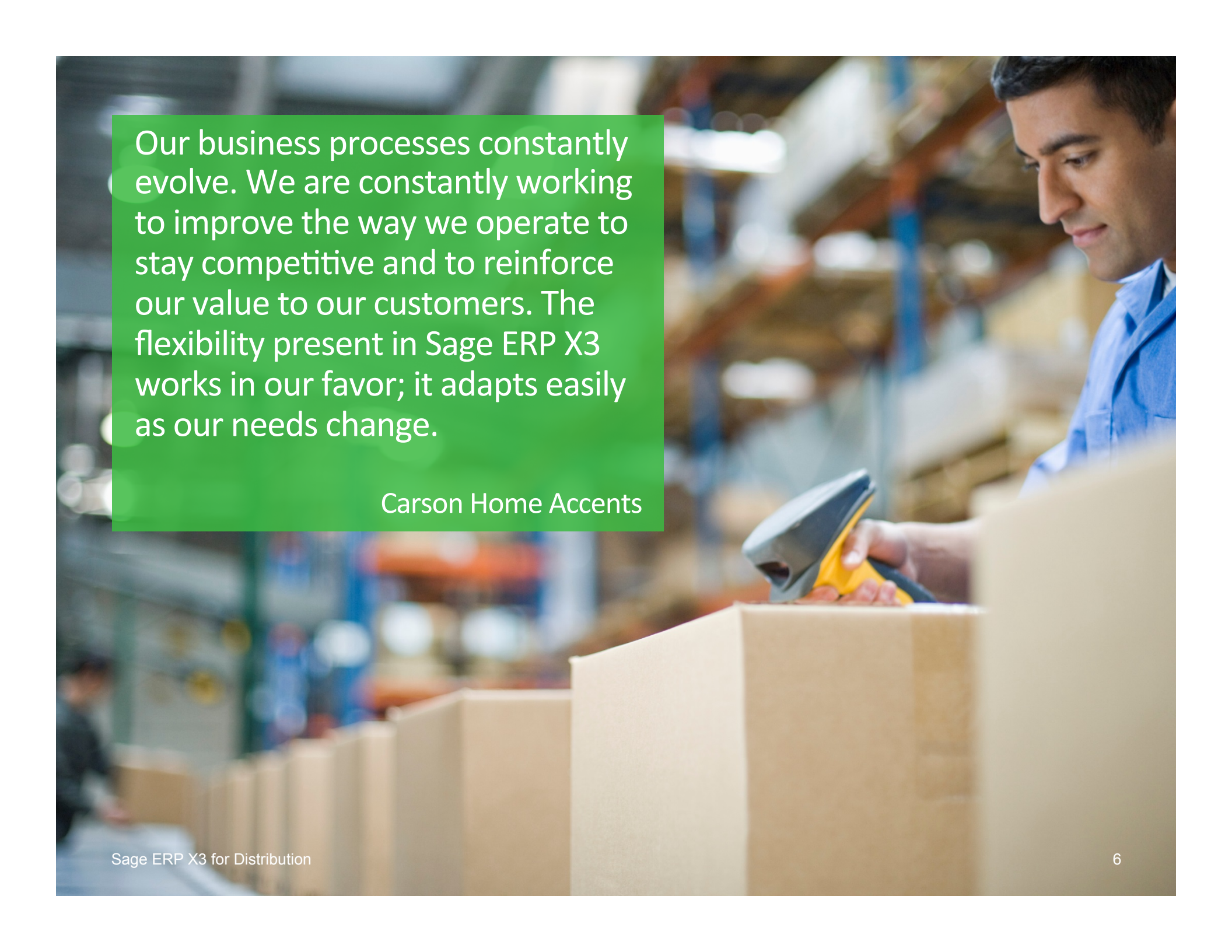
Supporting Distribution Best Practices



We needed an application that would give us quick answers anywhere in the world. That was the determining factor in the choice of Sage ERP X3.

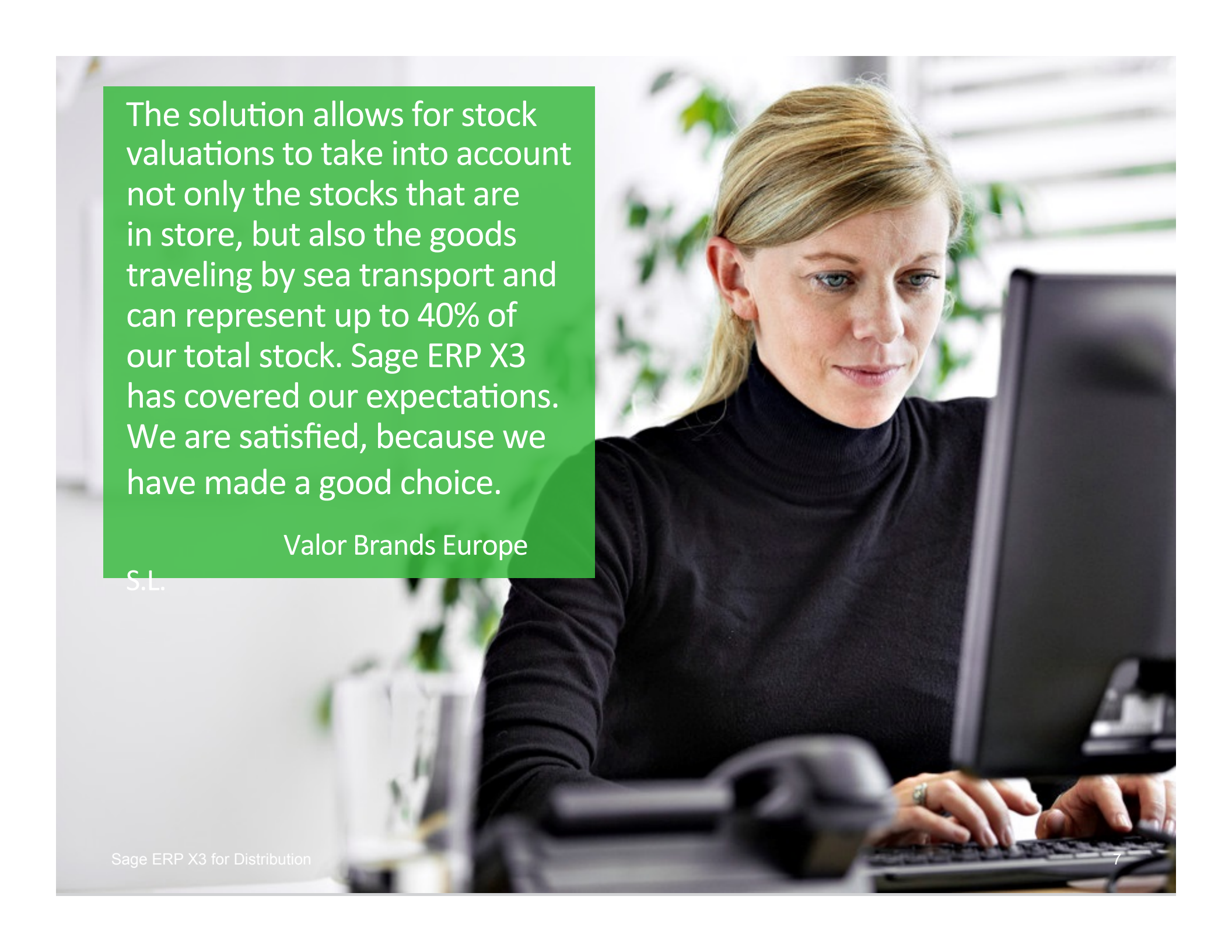
Given our processes, it is extremely important for our sales team to be able to access the system - to verify orders, see stocks available - wherever they are.

Quinta Do Noval

A man in a blue shirt is using a handheld scanner on a cardboard box in a warehouse. The background is filled with more boxes and warehouse equipment, creating a sense of a busy distribution center.

Our business processes constantly evolve. We are constantly working to improve the way we operate to stay competitive and to reinforce our value to our customers. The flexibility present in Sage ERP X3 works in our favor; it adapts easily as our needs change.

Carson Home Accents



The solution allows for stock valuations to take into account not only the stocks that are in store, but also the goods traveling by sea transport and can represent up to 40% of our total stock. Sage ERP X3 has covered our expectations. We are satisfied, because we have made a good choice.

Valor Brands Europe

S.L.

Feature Highlights for Distribution





Monitor and manage all aspects of your sales team enabling them to maximize opportunities and automate administrative tasks.

Manage multiple company units, national and international, within one data structure.

Reduce complexity and achieve transparency between business units as all information is stored in the same database.

Gain complete purchasing control to generate and track purchase orders from purchase request issue to receipts and purchase invoices.

Ensure the highest level of service according to quality and delivery thanks to the customer support and CRM transactions.

Gain immediate visibility of inventory to ensure compliance with customer and regulatory mandates, and optimize .

Optimize and manage all levels of planning and execution in the supply chain -- strategic, operational and tactical.

Provide a better customer experience by accessing accurate customer and product information on the spot.

Ensure operating margins and get a clear visibility of cost thanks to the real-time analysis and inquiries.

Empower users with an intuitive navigation through role-based business processes.

Role-based KPIs and personalized dashboards to monitor business performance.

Automated Workflow and Notification Management for rapid responses to anomalies.

Business Process Integration



Streamline operations with end-to-end process integration

ACCOUNTING & FINANCE

General ledger, AR/AP
 Payments
 Cost accounting
 Budgeting
 Allocations
 Fixed assets
 Multi-currency, multi-company, multi-legislation/multi-chart of accounts

INVENTORY

Multi-level warehousing and location management
 Movements and transactions
 RF data collection
 Quality control
 Costing
 Acquisition price tracing
 Inventory control
 Procurement

SALES

Pricing, quotes & contracts
 Order entry
 Product configuration
 Inventory allocations
 Delivery scheduling & shipping
 Invoicing
 Customer returns
 Sales commissions

CUSTOMER SERVICE

Contact management
 Customer support
 Warranty management and service orders
 Knowledge base
 Campaigns

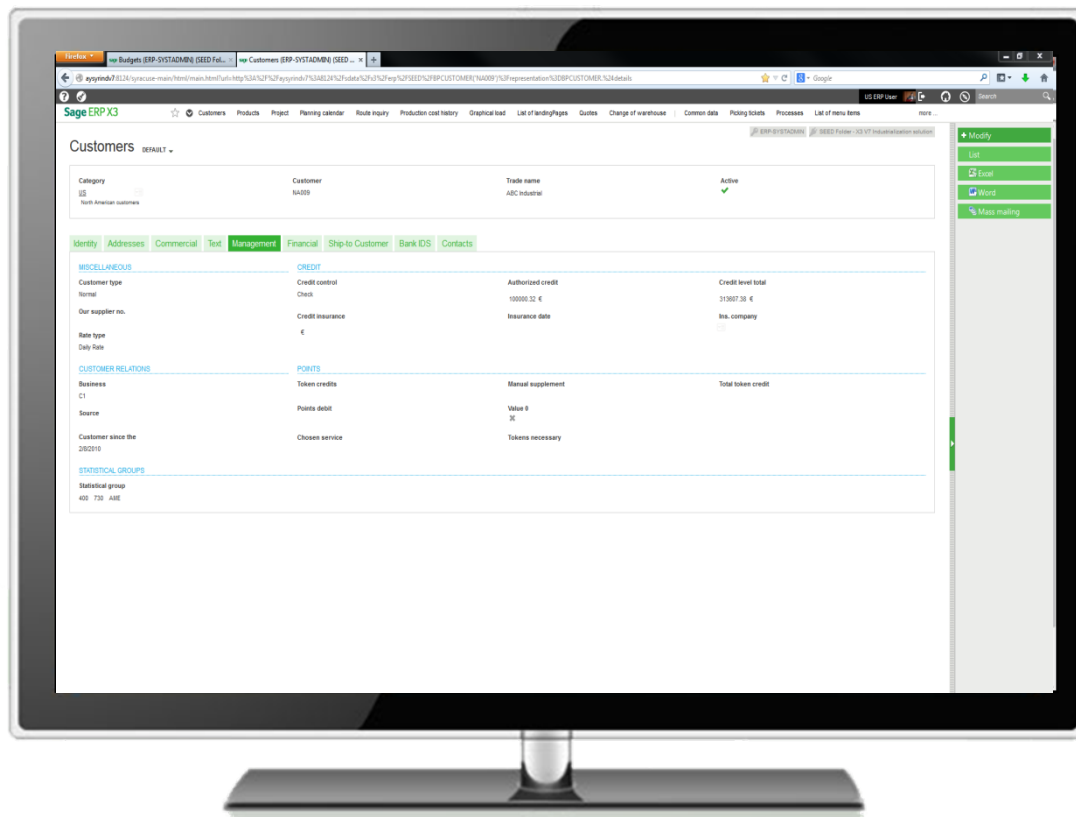
MANUFACTURING

Routings
 Discrete or process batch flow
 BOM/Formula management
 MPS/MRP
 Technical data configurator
 Costing
 Quality control
 Forward/backward traceability
 Shop floor control
 Capacity planning

PURCHASING

Purchase requests
 Encumbrance accounting
 Requests for proposals
 Purchase orders
 Outsourcing/Sub-contracting
 Multi-level approval processing
 Contracts
 Invoice tracking

Sales Management



Access information quickly such as products, price lists, discounts, or carriers.

Flexible pricing system with the ability to create prices for various company events as well as enact mass price changes and entry of future prices.

Issue customer quotations, book and transmit orders, manage contracts, display and allocate goods from stock, and manage the dispatch and loan of goods prior to invoicing.

Single and Multisite Management

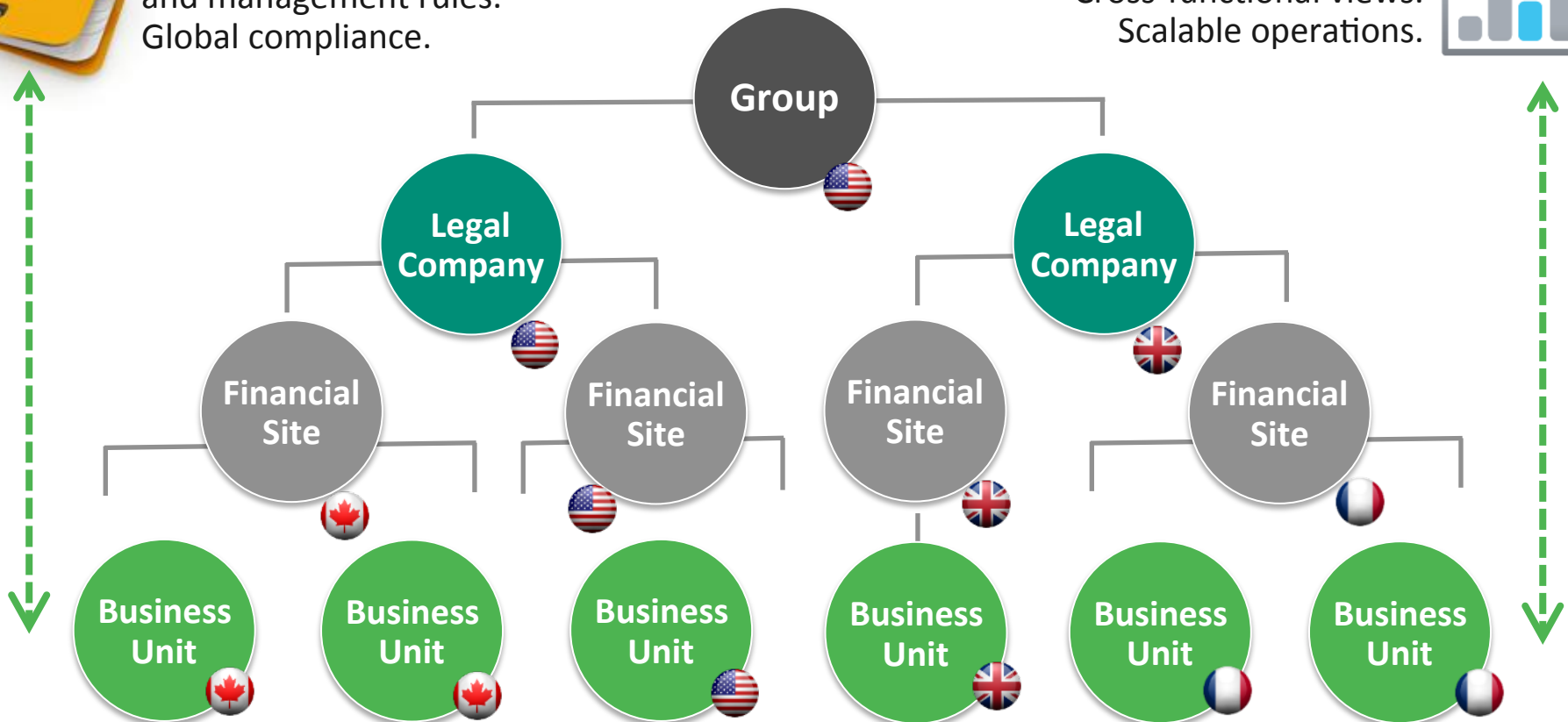


Multi-company, multi-site, and multi-legislation structure



Common frame of reference and management rules.
Global compliance.

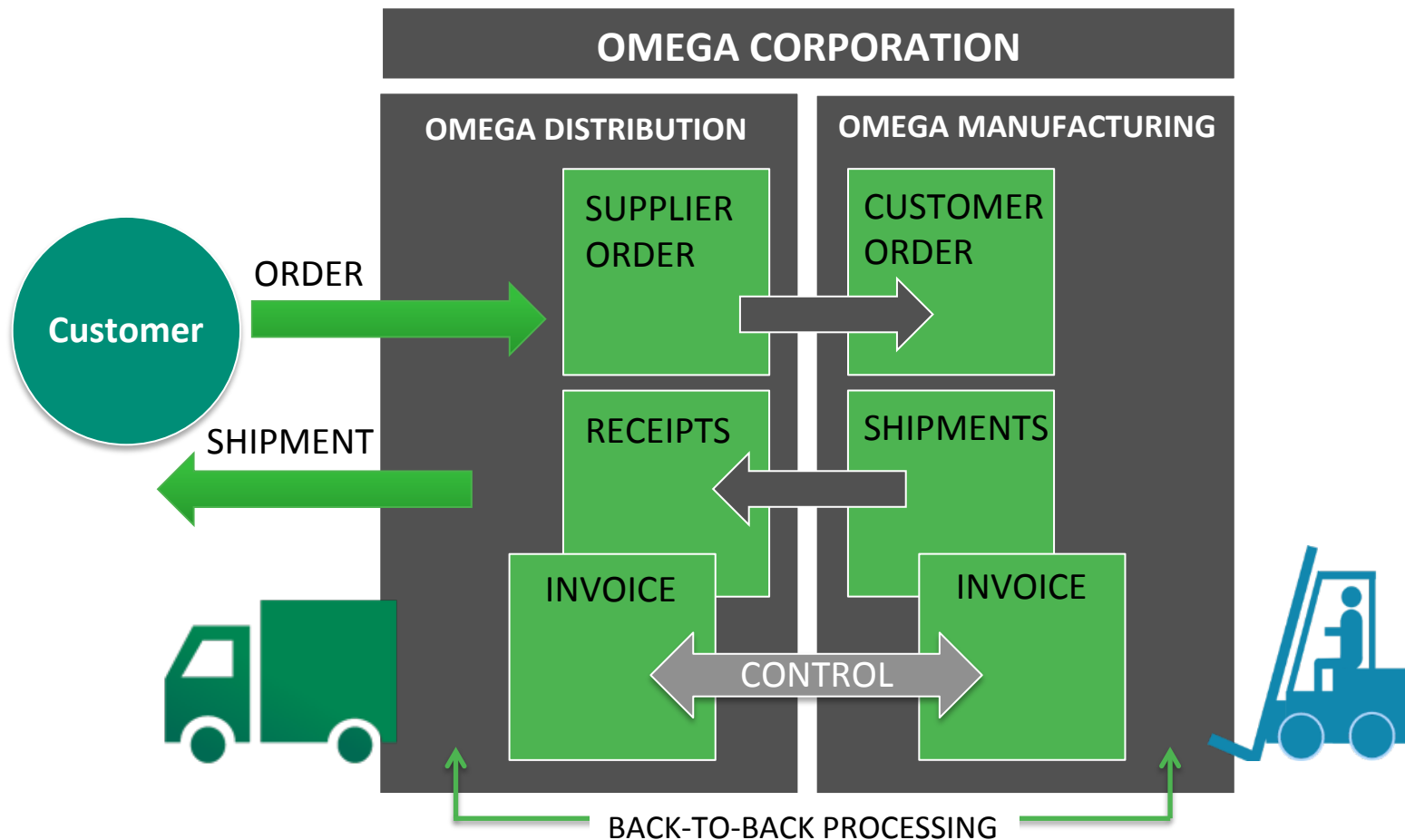
Flexible reporting.
Cross-functional views.
Scalable operations.



Inter-Company Processes



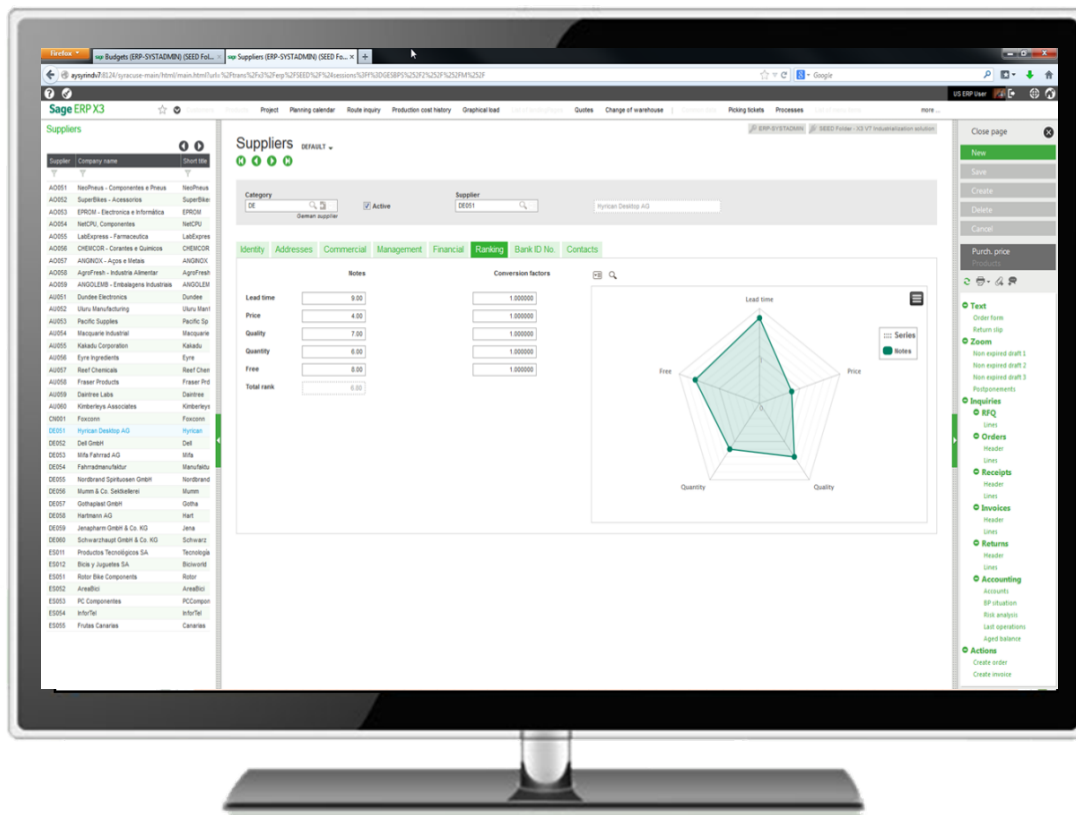
Gain control over inter-company transactions for both time savings and reduction in errors.....



Purchasing and Procurement



End-to-end purchasing oversight



Access information quickly such as products, price lists, discounts or carriers.

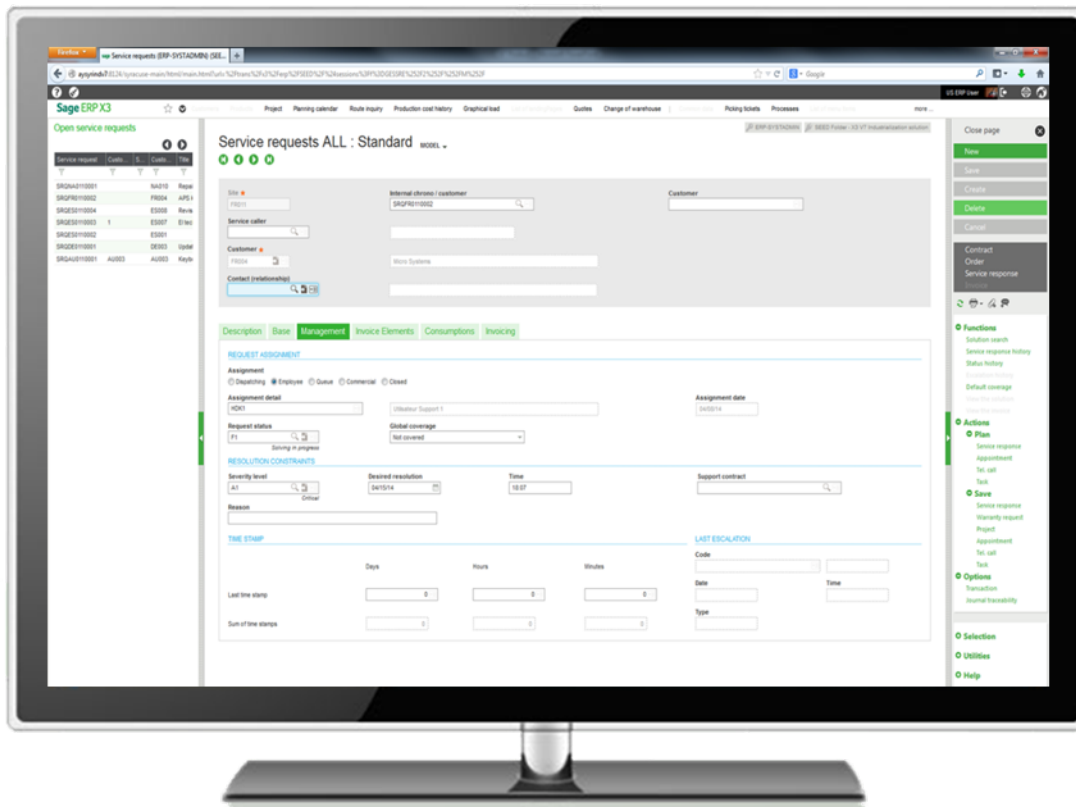
Inventory counts and details for quick access available by desktop, tablet, and special screens for mobile.

Purchase requests, purchase orders and contract capabilities

Budget monitoring and multi-stage signature control

Outsourcing

CRM and Customer Support



Monitor prospect and customer information, manage sales force assignments, and corresponding targets and commissions.

Sales force automation

Customer support

Guarantee management

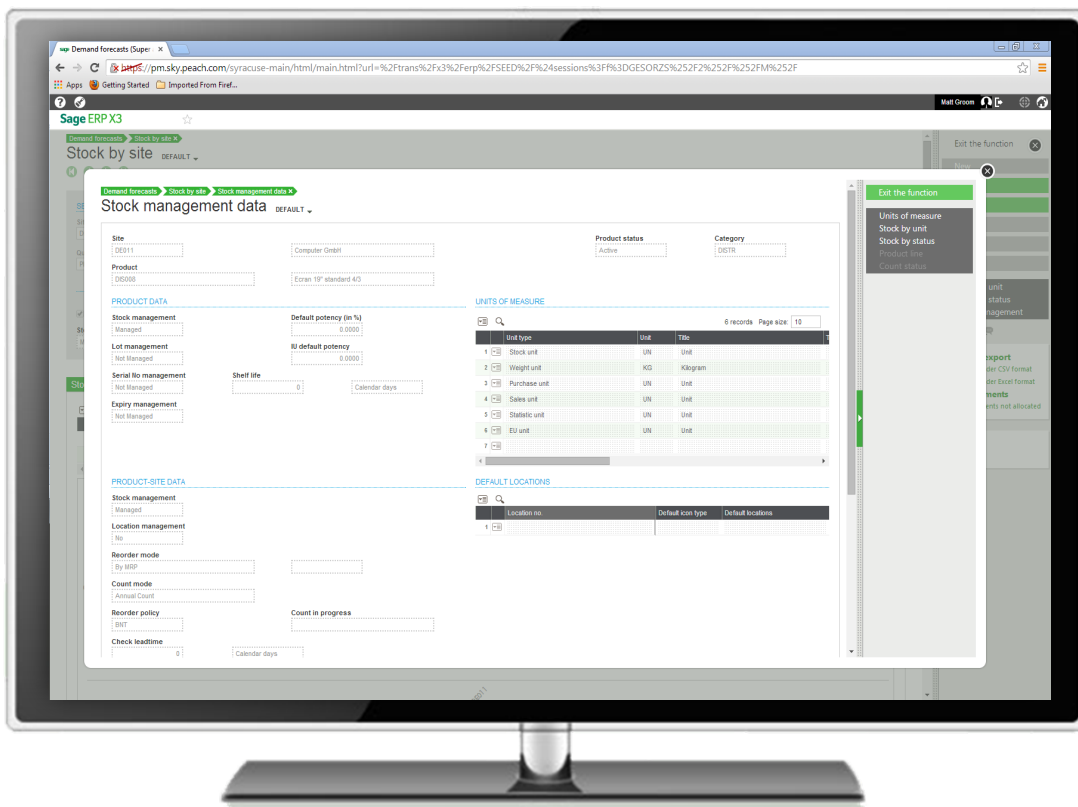
Services requests

Knowledge base

Inventory Management



Seamless and secure processing of warehouse business transactions



Warehouse management capabilities with RF support and barcode printing.

Support for directed operations such as put-away and pick planning and scheduling.

Searchable stock balances by site with further zooms to location and lot levels.

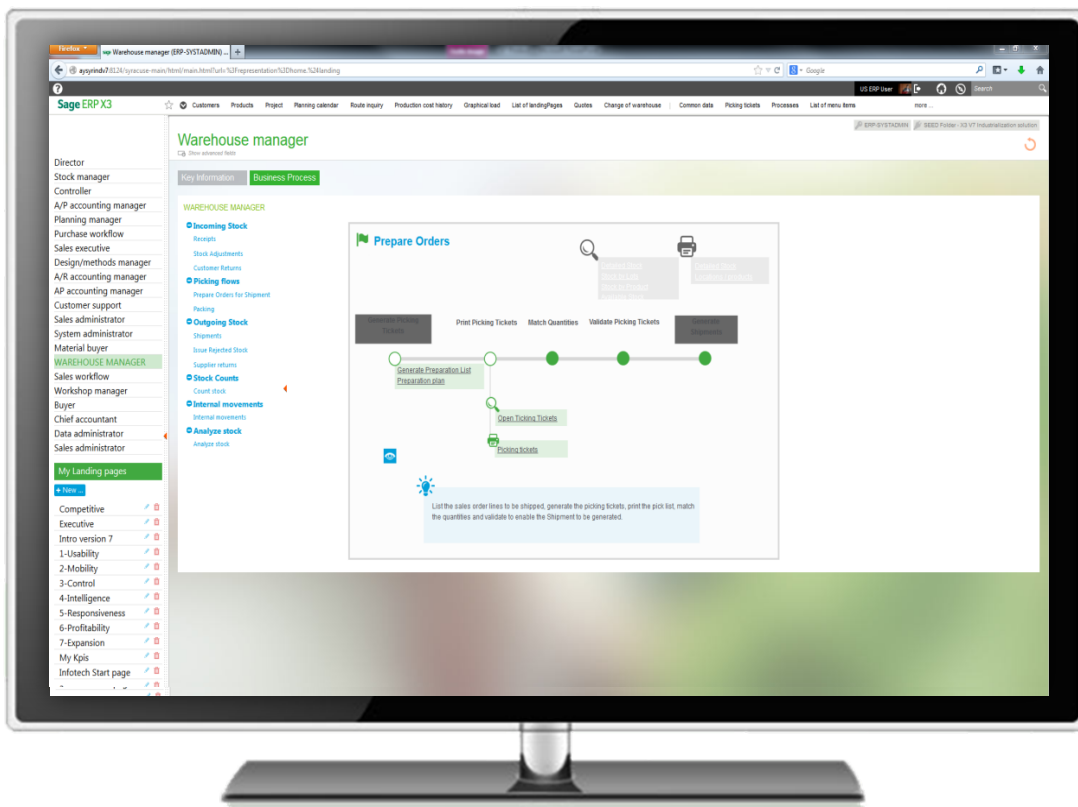
Traceability in real time.

Quality management capabilities for acceptance or rejection based on inspection results.

Logistics



Optimize and manage your supply chain



Order preparation

Cost control with the integration of additional purchasing costs

Anticipate shortages with the integration of the sales forecasts

Shipment management and carriers costs definition and document associated

Multi-warehouse management

Multiple replenishment engines

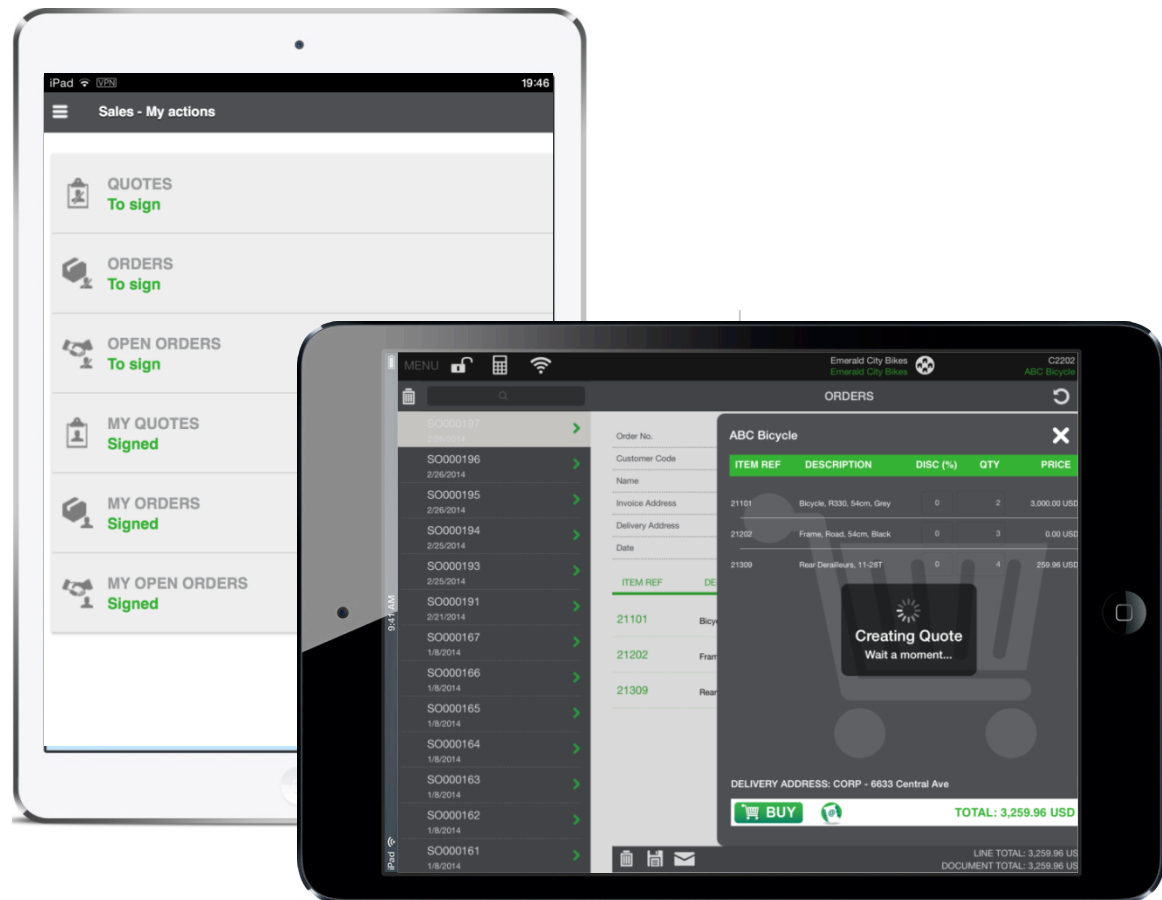
Mobility



Real time access – anytime, anywhere

Provide a better customer experience by accessing accurate customer and product information on the spot.

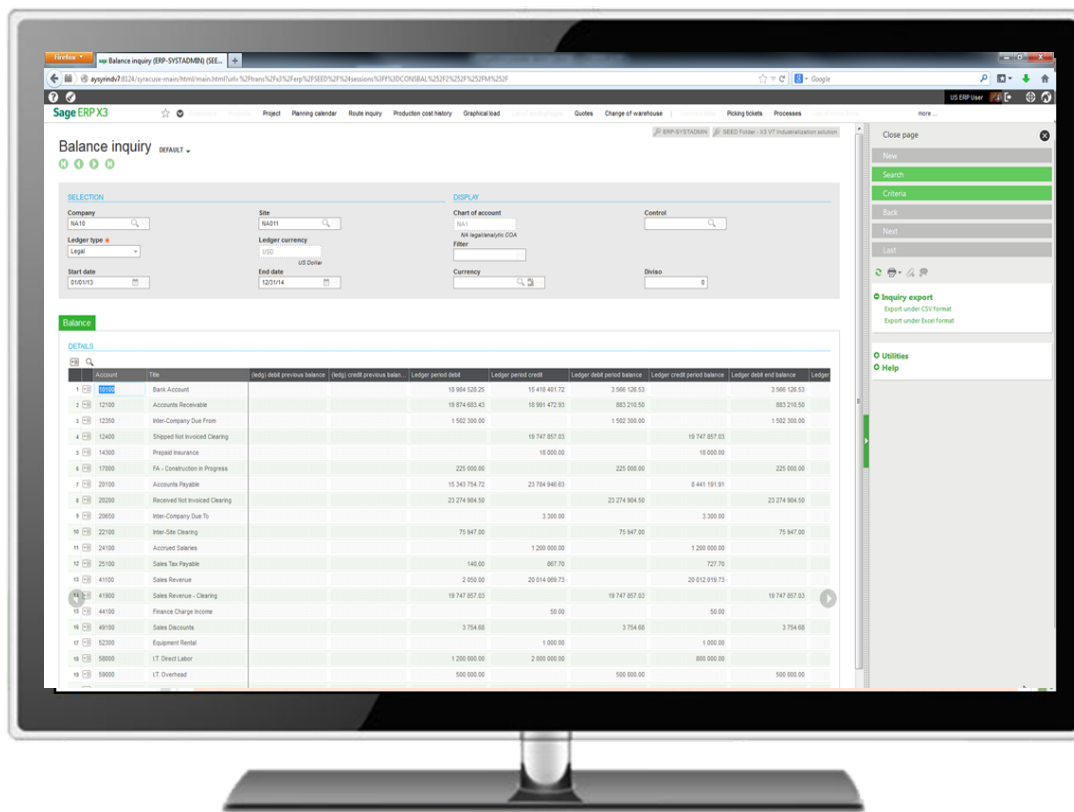
Reduce time to place orders, calls to accounting and warehouse by providing real-time data to sales teams in the field.



Financial Accounting Management



Purchase to payment, order to cash



General ledger and multi-ledger structure

Account receivable and creditor accounting, account payment transaction

Cost accounting and budget control

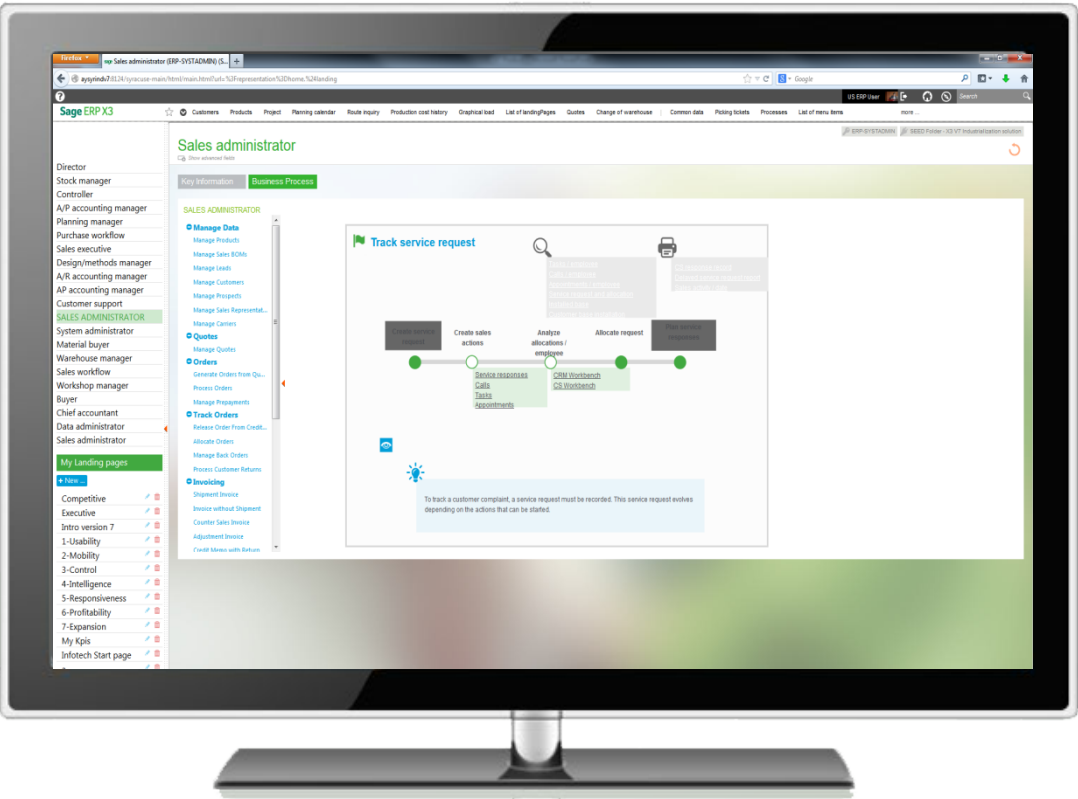
Ensure the financial information thanks to reliable data and easier to audit

Improve efficiency of financial processes thanks to integrated and automated processes

Sage Visual Processes



Empower ERP users with an intuitive navigation through business processes



On-screen guidance through quality procedures.

One-click access to any functions of the system.

Standard library of customizable templates provided out of the box.

Personal Dashboards



Gain a real-time, company-wide view of operations



Monitor performance with role-based KPIs and dashboards.

Customize your dashboard to include information important to you.

Identify anomalies and drill-down to more details in one click.

Automated Workflow and Notification Management



Respond confidently and rapidly to changing business conditions

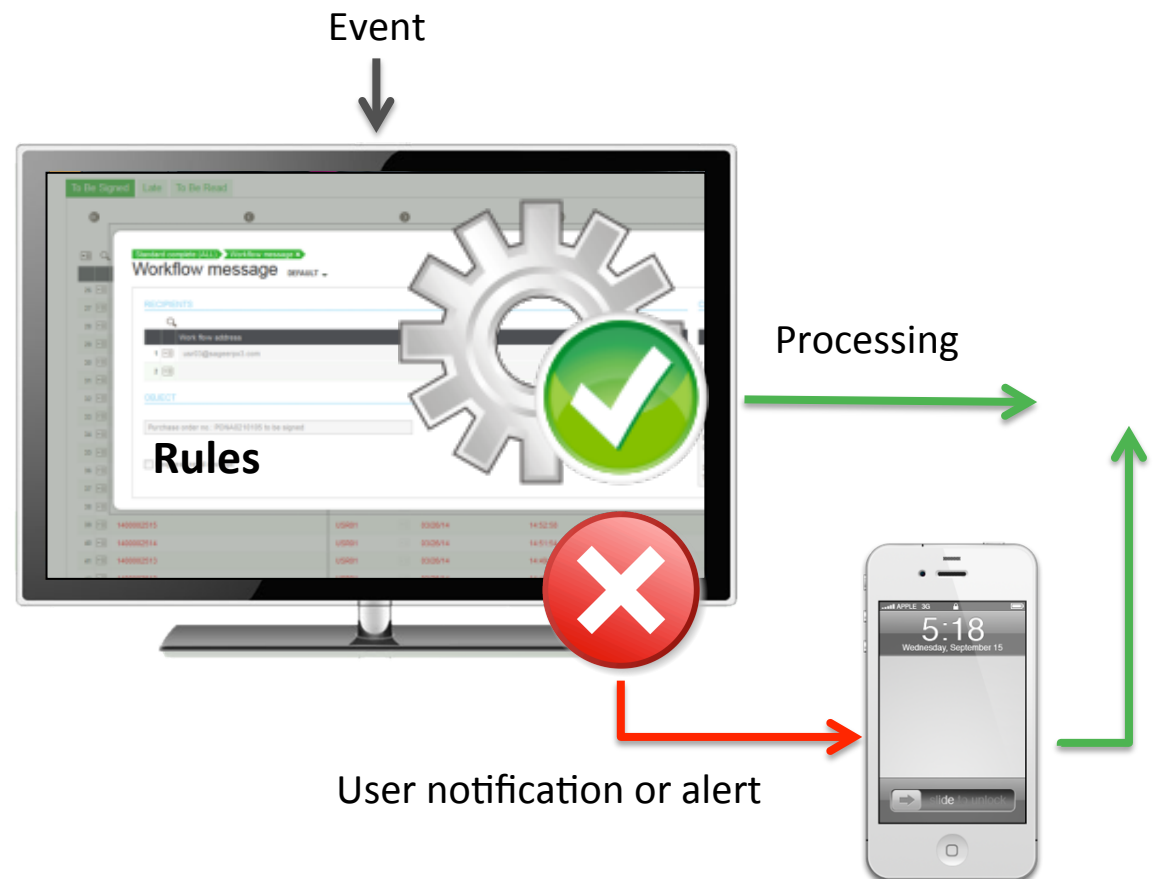
Preconfigured based on best practices.

Flexible rules

- Custom processes
- User, role, group of users

Event-based triggers

- Data change
- Data entry
- Process
- System (data export, print, email and more)
- Triggered by user



7 Ways to Grow with Sage ERP X3 version 7



- 1 Usability:** Get more done, faster.
- 2 Mobility:** Go where your business takes you.
- 3 Control:** Take back control over your business processes.
- 4 Intelligence:** Get the insight you need, when you need it.
- 5 Responsiveness:** Serve your customers better and earn repeat business.
- 6 Profitability:** Create cash flow from within and invest in growth.
- 7 Expansion:** Scale and expand to new markets or geographies.

Sage ERP X3



Now midsize companies can **grow forward**, with **faster, simpler, and flexible** ERP.



sage