Distribution

Sage ERP X3 distribution functionality is comprised of three domains—Sales, Purchasing, and Inventory.

Sage ERP X3 Sales enables you to monitor all information concerning customers or prospects, manage sales force assignment, and monitor corresponding targets and commissions. This module provides a quick look at information concerning products, price lists, discounts, or carriers, among others. You can issue customer quotations, book orders and transmit order acknowledgements, manage contracts, display and allocate goods from stock, and manage the dispatch and loan of goods prior to invoicing.

Sage ERP X3 Purchasing covers the purchasing process from end to end, starting with management of requests for quotes (RFQs), input and follow-up of replies, and integration into the price list base. This is followed by purchase requests, orders raised and delivery monitoring, subcontract orders, buyer work-loads, and management of signature circuits through to incoming goods reception and verification of invoices.

Analytical tools are used to monitor exchanges with suppliers to meet the main objectives of the purchasing department in terms of quality assurance, compliance with delivery dates, and purchase cost.

Integration into the accounting system is automatic through preliminary and firm commitments. This provides operational budget control from purchase requests to the issue of orders. Actual data is integrated automatically through management of invoices receivable and definitive invoices. Accounting procedures involving averaging of expenses in relation to service provision periods are also available.

Sage ERP X3 Inventory ensures optimum coherence and real-time monitoring of inventory status data. Inventory control is fully user-definable on each site with the application of the multisite, multiwarehouse and multilocation management. The module also incorporates some powerful quality control functions, also providing for total traceability of inventory quantities in real time, both upstream and downstream, by material flow management.

The optional Freight Management Interface add-on enables rate shopping at order entry and seamless data exchange between Sage ERP X3 and the most popular parcel shipping systems such as FedEx Ship Manager®, UPS Worldship®, USPS Shipping Assistant, and LTL carriers.

Sales

Business Partners and Products

Sage ERP X3 Sales accesses the latest data about business partners and products. Sold-to, ship-to, bill-to, and pay-by information is defaulted on sales documents while customer product-level information can be accessed to assure a personalized, customer-driven order entry environment. Supporting information—such as product substitutes and supersessions, notes, previous orders and prices, and special customer packaging—can either be displayed automatically or by user request. Sage ERP X3 also supports sales kits with fixed components or as special configurations using variants and options. Shipping functions use customer-specific information to schedule deliveries on the right day and to enforce complete shipments of orders or line items as required.

Flexible Pricing Rules

Sage ERP X3 promotes innovative, flexible pricing that helps companies achieve an appropriate mix of customer value and profits. By combining key elements from customer and product master data, companies can exploit a wide variety of pricing methods like contracts, promotions, sales channel prices, and variable kit pricing. Special features include the ability to price by groups of lines and to add free products or quantities if predefined thresholds are met. Discounts and charges can be automatically factored into net price or broken out and tracked separately.

Flexible Order Acceptance and Processing

Sage ERP X3 supports a variety of ways to facilitate building and optimizing long-term relationships with business partners. Quotes can easily be turned into orders, contracts can be defined, and releases scheduled for fixed and long-term planning horizons. User-defined order types assure that only data supporting the appropriate order mode is prompted, allowing companies to vary order acceptance easily to phone, order form, counter sales, and electronic environments. Other productivity-enhancing features include the ability to duplicate previous orders easily and to revise existing orders by populating changes in order date, carrier, or location across multiple line items.

Inventory Allocation and Delivery Scheduling

Inventory can be allocated to orders immediately or deferred to a separate process that allocates based on user-defined criteria. Sage ERP X3 also supports the ability to reserve inventory for key customers in advance of receiving their orders and to allocate by lot number as required. Ship-to addresses, shipping sites, carriers, and delivery dates can be set by order line, eliminating the need to create separate orders. Sage ERP X3 calculates the shipping dates needed to meet each customer's delivery date and automatically backorders quantities that are not available at the needed time. Users have easy access to time-phased, Available-To-Promise information, as well as online visibility into different warehouses to help determine the most appropriate shipping point for filling orders. Alternatively, orders can be sourced by shipping directly from suppliers, by transferring products from other sites or by creating production orders. Sage ERP X3 provides the ability to create purchase orders (POs) to preferred suppliers automatically for prespecified products, such as nonstocks.

Optional Credit Card and Sales Tax Interfaces

Two optional add-on interfaces are available to enhance the sales functionality of Sage ERP X3. The Credit Card Interface provides a standard, predefined interface for passing information between Sage ERP X3 and the PayPal Payflow Pro system. The Vertex Sales Tax Q-Series Interface enables seamless data exchange between Sage ERP X3 and the leading jurisdiction-based sales tax calculation software by Vertex.

Features and Functions

Order Entry

User-defined order types for varying prompts, displays, and event sequencing

Special orders for loans, transfers, and consignments

Add new customers online during order entry

Order products by customer product number and default customer-specific information on order line

Order substitutes and products that supersede obsolete products

Vary ship-tos, shipping sites, carriers, and delivery dates by order line

Order kits with variants and options

Check minimum gross margin and low price thresholds, and block or accept further entry according to rules

Sales order revision control with ability to replicate one change across multiple line items

Automatically close unfilled orders and lines within predefined tolerance

Automatic intercompany transaction management

Contracts

Vary contract terms, validity dates, and prices by line

Schedule releases over user-defined firm and planning time horizons

Automatically Generate Purchase Orders

Nonstock purchases

Automatically order predefined minimum quantities from preferred supplier

Supports direct and cross-docked orders

Quotes

Enter quotes for customers or prospects with full expiration date control

Produce hard copy quotations

Track probability of converting quotes into orders

Easily convert quotes into sales orders

Sales Documents

Order acknowledgements

Sales quotes

Contracts

Packing slips

Bill of lading

Certificate of analysis

Invoicing

Produced automatically or by user request

Define invoicing rules according to customer preference—one per order, shipment, bill of lading, or period

Consolidate invoices based on customer-preferred frequencies—daily, weekly, monthly, and more

Supports counter sale environments

Issue and track prepayment requests and payments

Multiple payment terms and methods, including scheduled due dates per invoice and recurring invoicing

Automatically use alternate payment terms if amount is less than predefined minimum

Pro forma invoicing

Supporting Inquiries

Inquire during or outside of entry functions

Last prices and price reasons

Customer account information

Current and projected stock levels by site or all sites

Zoom to detailed information—locations, lots, serial numbers, and more

Reminders/Dunning Letters

Supports multiple successive levels of reminder according to severity of past due condition

Block account activity based on user-defined criteria

Pricing

Automatic pricing by line item according to pricing rules with ability to edit

Maintains gross and net price on order line with option to view price reasons and last prices

Automatically factor discounts and charges into net price or break out separately

Adds free products or quantities if predefined thresholds are met

Recalculates prices for groups of related products if predefined threshold is met

Calculates differential between kit components selected during order entry

Inventory Allocations

Allocate manually during order entry or separately using a batch process with options

Allocate by site, lot, or consignment location

Reserve inventory for customers (preorder)

Deallocate inventory

Allocate by customer shipping route and priority

Automatically allocate backorders upon receipt

Customer Delivery Scheduling

Default shipping sites by ship-to delivery address

Maintain shipping lead times between sites and ship-to addresses

Calculate shipping date for meeting requested delivery date based on lead time

Maintain customer availability days and dates and round delivery date to next work day

Multiple fulfillment methods—from stock, vendor direct, buy-in, transfer order

Shipping Confirmation

Produce picking tickets and packing slips

Record serial numbers for end-user tracking

Combine multiple orders on a single shipment

Automatic or manual shipping confirmation

Interfaces available for UPS and FedEx

Sales Commissions

Multiple sales reps per order line

Commission calculations based on user-defined formulas

Customer Returns

Link return to original shipment

Track return, expected return, and expiration dates

Automatically or manually assign RMA numbers

Track return reasons by line item

Process returns for loans

Produce credit memos

Credit Checking

Online credit checking with ability to hold customers that fail credit check

Bypass credit checking for specified customers

Customer credit inquiries

Reporting and Statistical Analysis

Standard reports or user-defined reporting using Crystal Reports®

User-defined formulas for calculating ABC rankings for customers and products

Standard tools for business intelligence and user-defined inquiries

Sales Tax Calculations

Supports North American and VAT taxing

Option to calculate prices with or without taxes

Integration with third-party vendor for complex tax environments

Purchasing

Business Partners and Products

Sage ERP X3 Purchasing accesses the latest data about business partners and products. Buy-from, pay-to, and bill-from information is defaulted on purchasing documents, while specific product-level information can be used for sending documents to suppliers using their own nomenclature to facilitate error-free transactions. Supporting information—such as supplier performance metrics, notes, previous purchase prices, and current promotions—can be displayed automatically or by user request. Buyers can easily access product information supporting a variety of purchasing needs related to raw materials, nonstocks, supply items, and services. A special purchase order workplan facility is available for buyers to pull in all open purchase requirements from MRP and other purchase requests, make any adjustments, and automatically create POs.

Flexible Pricing Rules

With Sage ERP X3, companies can easily maintain the latest supplier prices, terms, and promotions. Catalog prices, vendor quotes, and contracted prices can be used automatically on purchasing documents, while discounts and charges can either be factored into net price or broken out separately. Financial rewards like free freight can be achieved by ordering groups of related products that meet predefined thresholds.

Purchase Planning and Ordering

Sage ERP X3 supports the entire RFQ process, including entering products, issuing RFQs to vendors, sending follow-up notices, registering responses, and automatically generating pricing records to use on purchase orders. Purchase requests can be entered manually or generated automatically by MRP or non-MRP replenishment. Contracts can be defined and releases scheduled for both fixed and long-term planning horizons. Purchase orders

can be entered manually or created automatically from sales orders, buyer workplans and purchase requests. Sage ERP X3 also supports encumbrance accounting, which allows companies to precommit at the time of request—and formally commit at the time of purchase—expenditures against predefined budgets.

Delivery Scheduling and Receiving

Sage ERP X3 provides the ability to schedule an order quantity for multiple receipt points and delivery dates on one purchase order, thereby reducing the number of POs and allowing price breaks for total purchase quantities. A receipt entry function provides the ability to record carrier information, assign inventory to warehouse locations based on predefined putaway rules, and move quality-controlled products to and from QC areas based on user-defined inspection rules. Accepted quantities are immediately available for allocating to orders. Lot numbers and serial numbers can be recorded and subsequently tracked to their final destination, while expiration dates are calculated as required. Rejected products can be scheduled for supplier return with the option to reinstate the PO or request credit. Supplier invoices can be loaded from POs or receipts and three-way-matched prior to acceptance and payment.

Features and Functions

Purchased Product Categories

Raw materials

Products purchased for resale

Supplies and capital equipment

Services and recurring items (for example, maintenance)

Nonstocks

Subcontracted products

Purchasing Modes

Centralized and decentralized purchasing sites

Deliver to internal sites, consignment locations, and customers (direct shipments)

PO Creation Methods

Manually enter POs or duplicate a previous PO

Copy from purchase requests and vendor quotes

Automatically generate POs from sales orders and buyer workplans

Purchase Requests

Enter manually or generate automatically from replenishment requirements

Precommit amounts against budgeted expenditures (encumbrance accounting)

Optional multilevel approval cycle

Requests for Proposal

Enter manually or copy from purchase requests

Issue RFQs to any number of vendors

Send follow-up reminders to vendor

Record vendor quotes, terms, and conditions

Automatically generate pricing records

Purchase Order Entry

User-defined order types for varying prompts, displays, and event sequencing

Vary receiving sites and delivery dates by line item

Access previous purchase prices during entry

Enter and default product information by supplier product

Track product group price thresholds for obtaining free freight

Issue purchase orders—hard copy or electronic

Order status inquiries by PO, supplier, and product

PO revision control with ability to replicate one change across multiple line items

Contracts

Vary terms, validity dates, and prices by line item

Schedule releases over user-defined firm and planning time horizons

Encumbrance Accounting

Checks budget allowances at time of request and purchase

Precommits at time of request; commits at time of PO, in fiscal period of order date or due date

Signature process for approving budget overruns

Signature Management

Multilevel approval process:
Purchase requests | Purchase orders | Contracts

Workflow

Controlled by signature management specifically for PO processing

Available globally based on any significant event trigger

Receiving

Receive by supplier, PO number, or product

Assign putaway locations

Record lot numbers and serial numbers

Inspect QC products and calculate expiration dates

Receive full or partial quantities and products not on PO; option to disallow overreceipts

Record rejected and disputed receipts

Supplier Invoice Entry

Vary entry based on user-defined parameters and by invoice type—normal, memo, third-party

Load lines from original PO or receipt

Match invoice to PO and receipt information

Supplier Returns

Enter manually or copy from PO or receipt

Track return reasons and lot numbers

Option to cancel order or reinstate on same PO line, new PO line, or new PO Inventory

Inventory

Comprehensive Product Information

Sage ERP X3 Inventory provides a common repository for maintaining product information used in sales, purchasing, warehousing, and production. Sage ERP X3 manages lots, serial numbers, shelf life, expiration dates, and potency. Supported costing methods include standard, average unit, FIFO, LIFO, last, lot, and order cost. Sales information referring to substitutes, supersessions, warranty periods, customer products, and packaging is also provided. Products can be handled in various units of measure including stock, sales, purchasing, and packing, and in different types such as volume and length.

Location Management

Site parameters are used for flexible location numbering format definitions, as well as warehouse receiving, storage, and picking location assignments. Controls are provided to facilitate, delay, or restrict access to locations as needed. Locations can be dedicated to specific items, dynamically assigned, or used to track inventory stored at third-party sites.

Inventory Balance Snapshots

Sage ERP X3 allows users to view stock balances by site including on-hand, reserved, available, on-order, in-transit, on backorder, and QC, with further zooms to details at the location and lot levels. Available-to-Promise and projected stock level inquiries help users to visually see—using tables, graphs, or charts—the impact of events like order allocations and planned purchase or production orders.

Quality Control

Quality control features include forward and backward tracing of all QC-related transactions, as well as managing the disposition of accepted and rejected items. Both normal and lot-controlled items can be tracked from the point of origin—production or supplier—to the subsequent end user. All QC historical transactions are available on a single, easy-to-view window. Quantities in QC may be considered when calculating available stock. Special features are available to control items managed by expiration date, potency, and International Units.

Replenishment

Inventory replenishment rules and data are maintained by product and site to help balance customer service and inventory levels, including lead time, safety stock, reorder formulas, and firm and planning time horizons. Replenishment orders can be generated as part of MRP or to reorder buy-for-stock items separately. Multiple-order point and quantity schemes are supported including minimum/maximum, EOQ, and period coverage. Replenishment orders automatically become open requirements for action by production or purchasing. Internal picking bins are automatically replenished from bulk storage.

Stock Movements

Sage ERP X3 manages all inbound, outbound, and intrasite stock movements. Receipts, shipments, intersite transfers, and returns are tightly integrated with sales and purchasing. Transactions resulting from physical count and other stock adjustments are controlled by parameter-driven entry windows, adaptable to individual user and site policies. All intrasite stock movements to and from the appropriate storage and picking locations are also managed. Simple intersite transfers can be entered without the need to create sales and purchase orders.

Features and Functions

Product Catagories

Manufactured

Purchased

Subcontracted

Phantom

Internal (supplies and capital equipment)

Services

Nonstocked

Descriptive Product Information

User-defined numbers, descriptions, and notes

Embedding of Microsoft® Office documents (Word, Excel®)

Attached images and documents (such as MSDS)

Supporting information for sales and purchasing (warranty periods, nonstocks, and substitutes and supersessions)

Vendor and customer part number cross reference

Life cycle validity dates

Multilingual translations

Location Management

Flexible location numbering formats

Dedicated, random, and dynamic storage types

Suggested putaway and picking location assignments

Dedicated to single or multiple items/location

Immediate, delayed, or blocked access

Consigned inventory tracking at third-party sites

Automatic bin location replenishment

Stock Management

Track inventory by physical location

Lot numbers and sublots

Quality status and disposition (accepted, rejected, in QC)

Serial numbers

Expiration dates

Potency

Issue stock based on first-in or first-expired

International Units management

Forward and backward traceability

Inventory Costing Methods

Standard

Revised standard

Order cost

Average lot cost

FIFO

LIFO

Average unit cost

Last cost

Inventory Balances

On-hand

Allocated

Reserved

QC

Available

On-order

Backordered

Transferred

In-transit

Available-to-promise

Quality Control

Flexible definition of questions and responses

Tracks accepted, rejected, and expired stock

Performed with or without lot control

Receiving, storage, and preshipping inspections

Historical transaction inquiries for traceability

Multiple Units of Measure

Inventory units

Sales units, by product and customer product

Purchasing units, by product and supplier product

Packing units

Statistical units

Fixed or variable conversion factors

Define decimal quantities up to six digits

Stock Inquiries

Quantities by warehouse

Stock details by warehouse

Location contents

Expired and expiring stock

Projected stock quantities

Lots traceability

Serial numbers

Available-to-promise

Stock movements

Allocation details

Potency

Easy download to Excel

Physical Counting

Cycle, spot, annual, and zero stock counts

Option to include serial number validation

Select products based on ABC class

Enter, review, and validate physical counts

Maintain last count data by product/size

Inventory Replenishment

Calculates reorder points and EOQs

User-defined safety stock factors

Calculates periods of coverage and lot sizes

Use with or without MRP

Supports minimum/maximum

Bills of Material

Single or multilevel production and sales bills

Normal components, variants, and options

Alternate BOM for special customer requirements

Where-used inquiries

Copy feature for defining similar BOM structures

Inventory Movements and Transactions

Intersite (transfers between sites)

Intrasite (transfers between locations)

Picking location replenishment suggestions

Receiving putaway suggestions

Places locations with expired products on hold

User-defined allocation and issue rules

Complete traceability of all movements

User-defined inventory quantity adjustments

Statistics and Management Reports

Inventory accuracy based on count adjustments

Quality control (rejects, expired products, and others)

ABC rankings (simulated and actual)

Supports up to five user-defined statistical product groups (product line, price class, and more)

Last activity data by product/site