# Sage ERP X3
# Distribution

**sage**

# Sage ERP X3
## Distribution

**Sage ERP X3 distribution functionality is comprised of Sales, Purchasing, and Inventory.**

**Sage ERP X3 Sales** enables you to monitor all information concerning customers or prospects, manage sales force assignments, and monitor corresponding targets and commissions. The sales capabilities within Sage ERP X3 provide 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 workloads, and management of signature circuits through to incoming goods reception and verification of invoices.

Additionally, analytical tools are used to monitor exchanges with suppliers to meet the 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, multi-warehouse and multi-location management. The inventory capabilities of Sage ERP X3 also incorporate powerful quality control (QC) functions, also providing for total traceability of inventory quantities in real time, both upstream and downstream, by material flow management.

In addition to the inherent distribution functionality of Sage ERP X3, the seamless integration with Sage ERP X3 Shipping, efficiently manages the shipping process using the best rates to get products into the hands of customers quickly. It helps 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 either on-premise or in the cloud, Sage ERP X3 Shipping manages your shipping processes all the way to the printed labels, and originates shipments from the USA or Canada.

# Sage ERP X3
## 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 standard 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 flexible pricing that helps companies achieve a 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. Additionally, secure credit card processing is provided through a seamless connected service utilizing Sage Payment Solutions.

### 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 pre-specified products, such as nonstocks.

## Order/Shipment Preparation

Shipment Preparation provides a flexible process for managing warehouse and customer order deliveries. Orders can be processed individually or grouped. These options allow customers to tailor the process to maximize their return on warehouse personnel and equipment.

# Sage ERP X3
## 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, non-stocks, supply items, and services. A special purchase order work plan 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 pre-commit 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.

# Sage ERP X3
## 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 and Sampling

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. Sampling is initiated through multilevel controls and is integrated throughout the QC process.

### 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.

## For a detailed listing of distribution functionality available through Sage ERP X3 please reference the Sage ERP X3 Solution-In-Detail.



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