Sage X3
What's new?

Bernard Wong

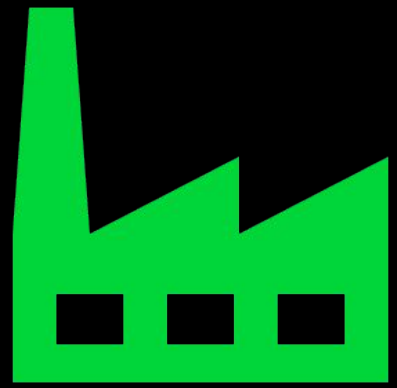
Agenda

1) What’s new in Manufacturing?
2) What’s new in PJM?
3) Benefits of PJM

© 2022 The Sage Group plc, or its licensors. All rights reserved.

What's new?

Manufacturing Management



Sage X3 | Version 12.0

The new Non-Conformance capabilities allow organizations to implement continuous improvement programs by identifying issues, adjusting and then following up on previously identified issues.

Quality management –

- Non Conformance Management
- This will allow customers to reduce costs, improve customer experiences and drive quality and performance improvements across the board.

Production management –

- Mass replacement and deletion in Versioning
- Revisions - critical changes (add, update, remove) in versioning

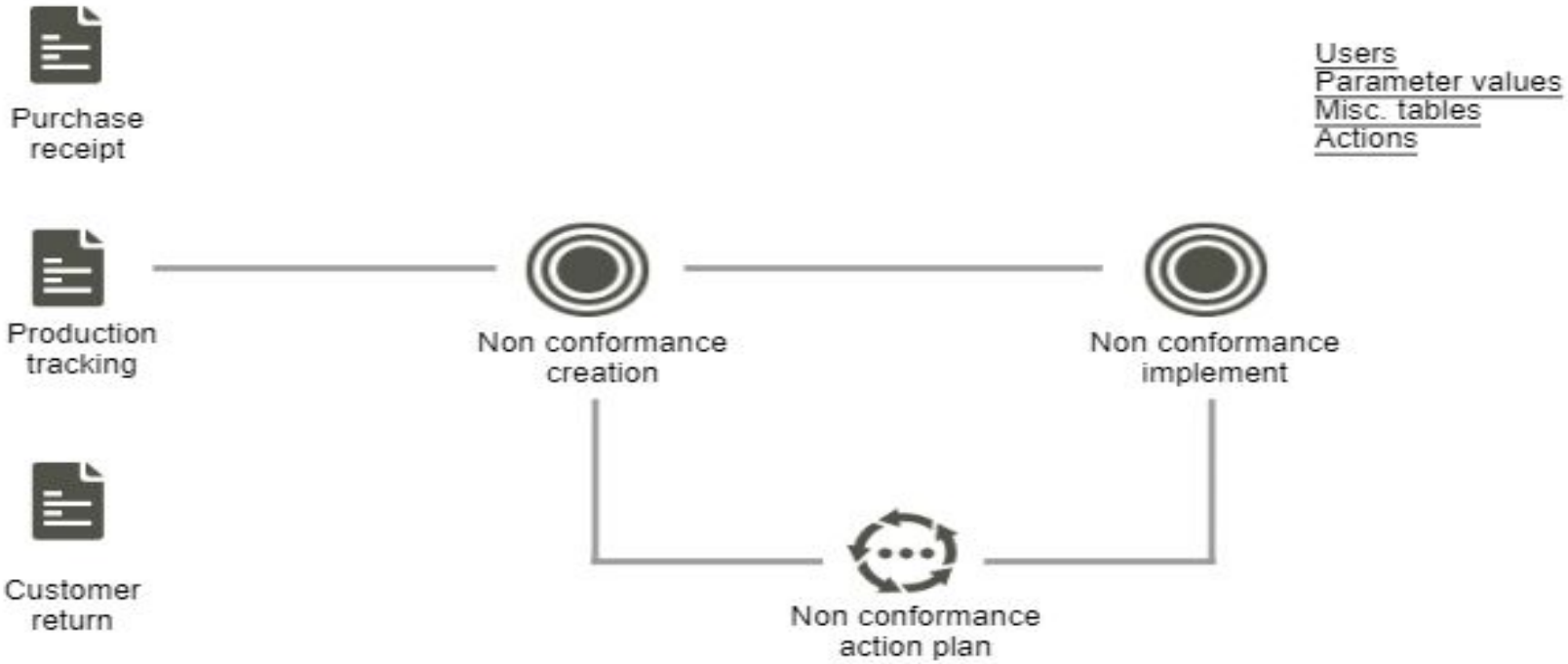
© 2022 The Sage Group plc, or its licensors. All rights reserved.

Manufacturing

SAGE PRODUCTION SCHEDULER | VERSION | SHOP FLOOR TRACKING | CHANGE CONTROL | NON CONFORMANCE | LPN | TRACEABILITY | +

NCM FLOW

Non conformance management

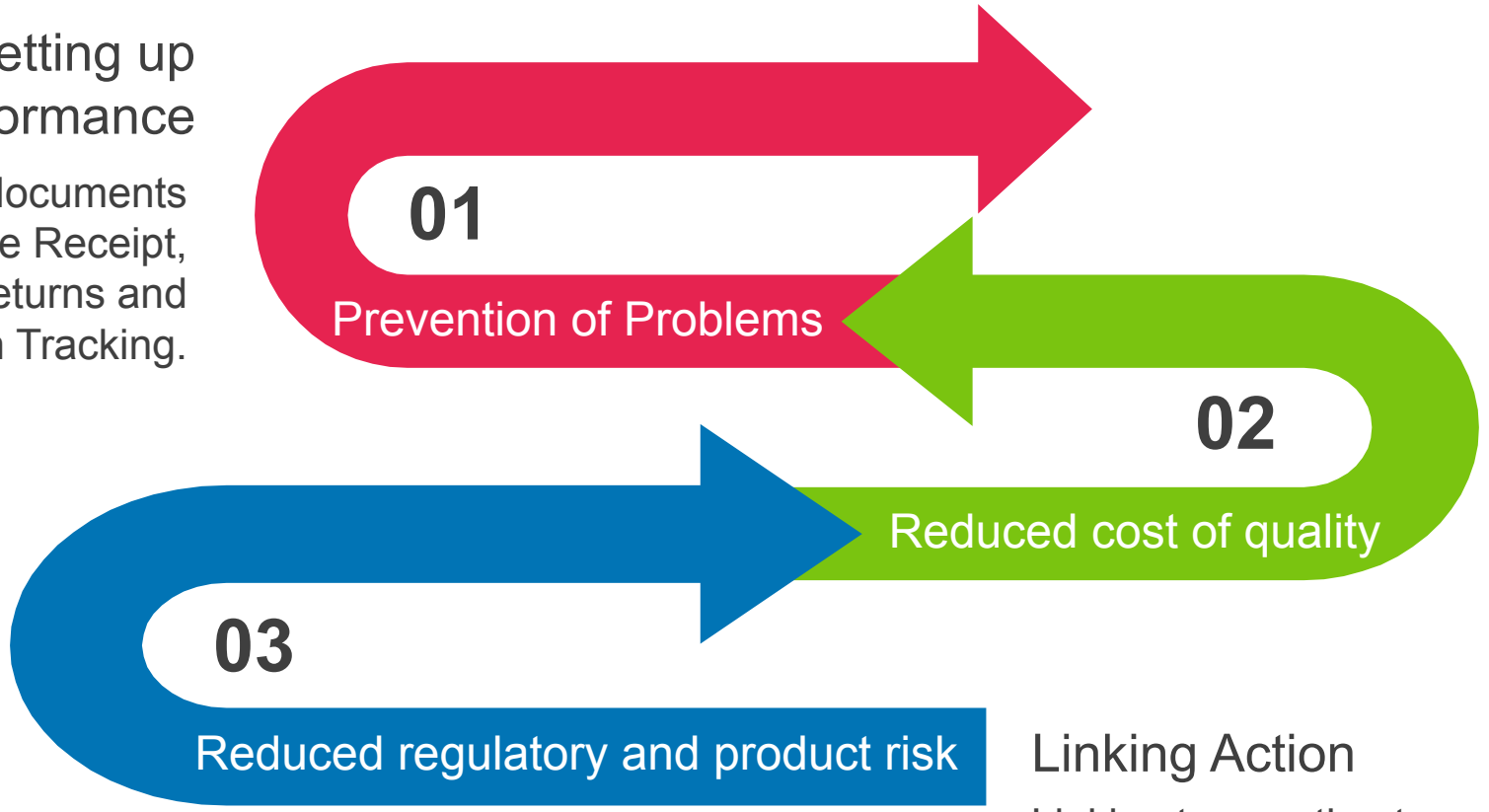


© 2022 The Sage Group plc, or its licensors. All rights reserved.

Benefit and features of NC

Setting up Non-Conformance

Linking NC to the documents such as Purchase Receipt, Customer Returns and Production Tracking.



Action Plan

Setting up action plans, corrective and preventive measures.

Linking Action

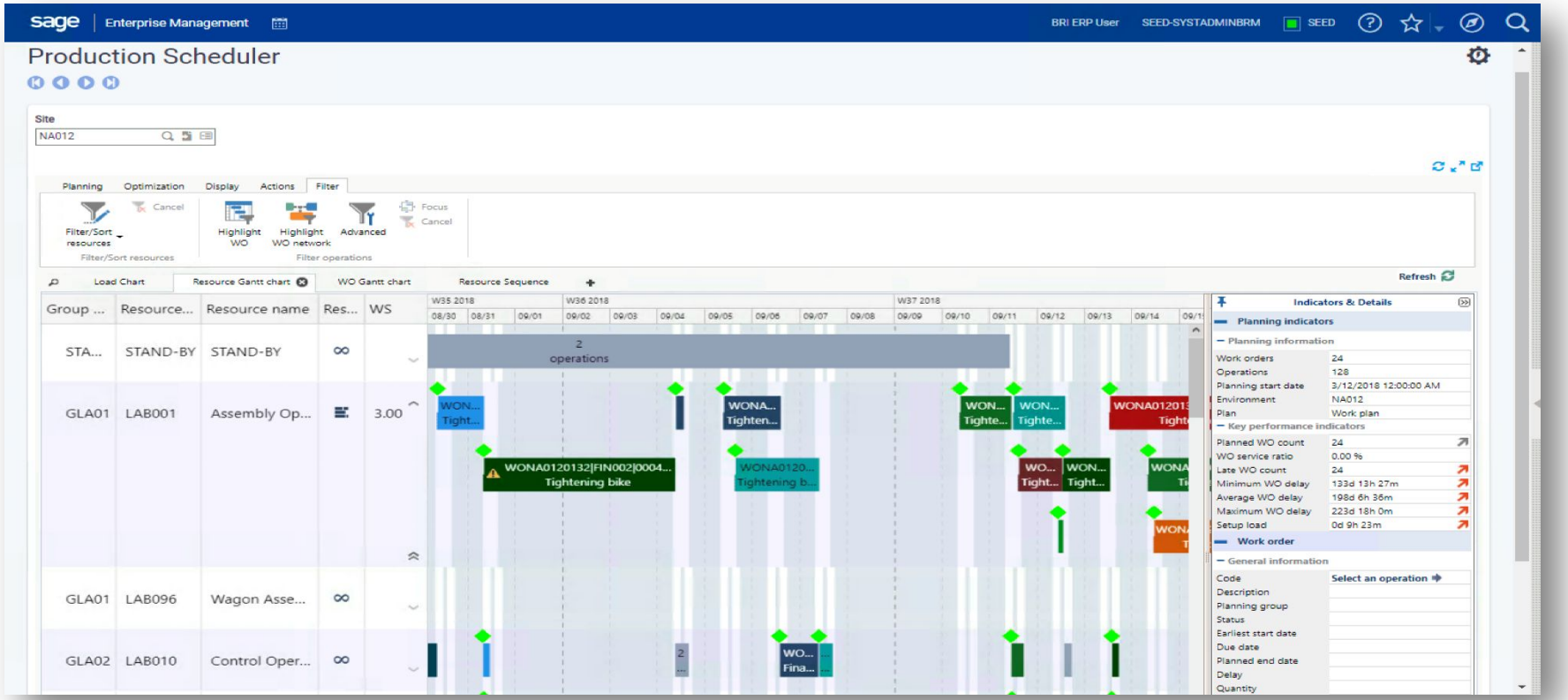
Linking transaction types with actions used in action plan with approvers.

© 2022 The Sage Group plc, or its licensors. All rights reserved.

What's new?

Manufacturing Management

Web Scheduling enhancements focused on improved planning and visibility across the organization. Easily identify dependencies between work orders and raw material availability.

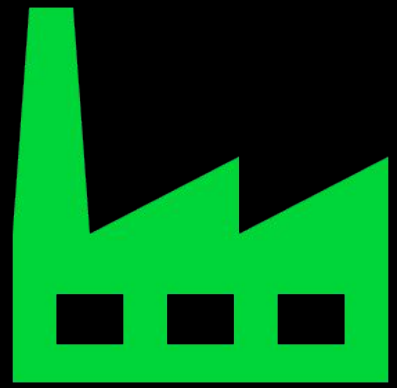


Sage X3 | Version 12.0

© 2022 The Sage Group plc, or its licensors. All rights reserved.

What's new?

Manufacturing Management



Sage X3 | Version 12.0

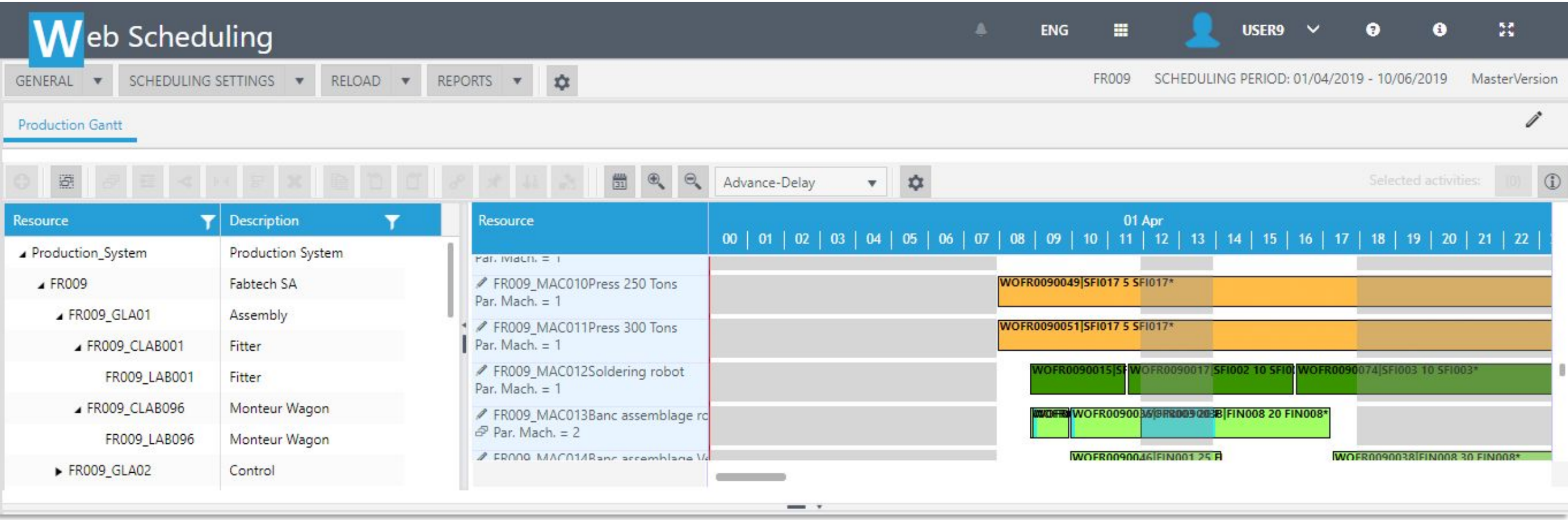
Web Scheduling enhancements focused on improved planning and visibility across the organization. Easily identify dependencies between work orders and raw material availability.

Production Scheduler –

- Raw material availability
- Link between WO
- Custom planning view with new criteria
- Fix operation start date

© 2022 The Sage Group plc, or its licensors. All rights reserved.

The Production Gantt



Scheduler/ planner view of “freeze” moment-in-time of snapshot of Sage X3 data.
Indicates set of work orders and dates as well as work centers.
Note: This is based on Material Matching Availability (on First Data Material Availability rule).

© 2022 The Sage Group plc, or its licensors. All rights reserved.

The Fishing Pond

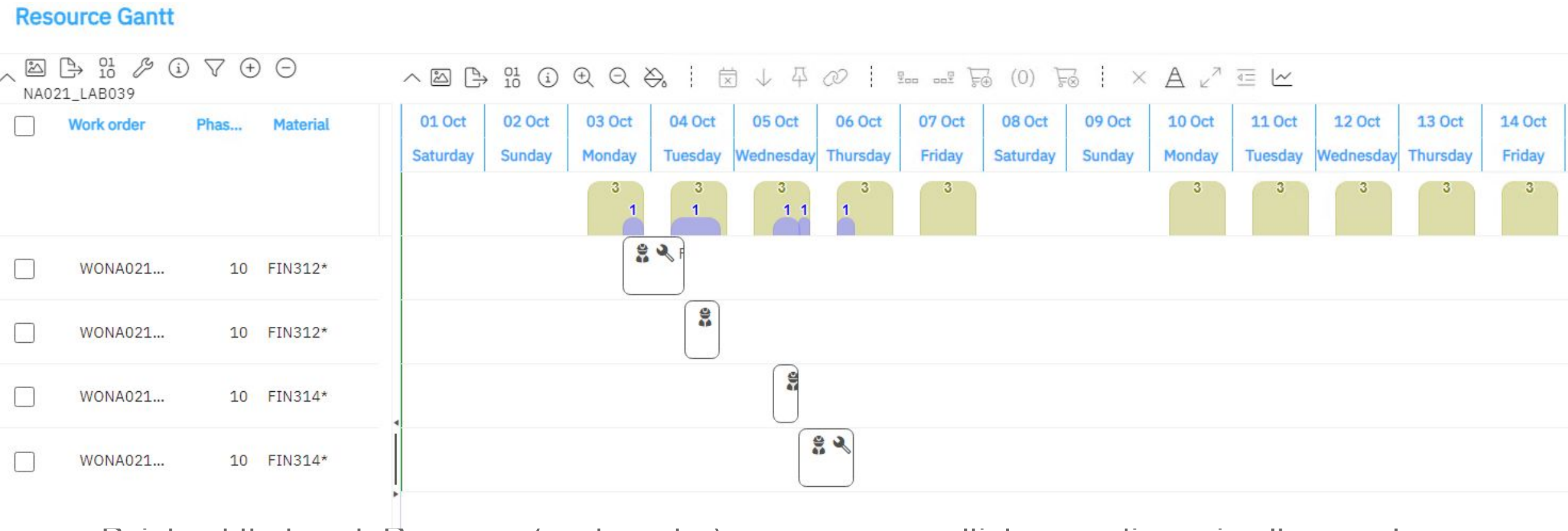
Fishing Pond

L...	S...	Work or...	P...	Material ...	Descripti...	W..	S...	D...	Scheduled	Q...	S...	Schedul...	Schedul...	Due date	Launch ...	S...
		WONA02101...	5	INT301*	Czujnik led na...	800	800	0	Scheduled	0		10/3/2022 8:...	10/3/2022 10...	1/20/2022 6:...	12/30/2022 1...	
		WONA02101...	5	FIN314*	Priv 1.8 Kg Ci...	2,300	2,300	0	Scheduled	0		10/5/2022 11...	10/5/2022 7:...	1/26/2022 10...	12/30/2022 1...	
		WONA02101...	10	FIN314*	Priv 1.8 Kg Ci...	2,300	2,300	0	Scheduled	0		10/5/2022 7:...	10/6/2022 10...	1/26/2022 10...	12/30/2022 1...	
		WONA02101...	5	FIN311*	Priv 450g Cin...	3,500	3,500	0	Scheduled	0		10/5/2022 7:...	10/6/2022 2:...	1/27/2022 10...	12/30/2022 1...	
		WONA02101...	10	FIN311*	Priv 450g Cin...	3,500	3,500	0	Scheduled	0		10/6/2022 2:...	10/7/2022 10...	1/27/2022 10...	12/30/2022 1...	
		WONA02101...	5	FIN314*	Priv 1.8 Kg Ci...	2,300	2,300	0	Scheduled	0		10/4/2022 7:...	10/5/2022 11...	1/21/2022 10...	12/30/2022 1...	
		WONA02101...	10	FIN314*	Priv 1.8 Kg Ci...	2,300	2,300	0	Scheduled	0		10/5/2022 11...	10/5/2022 7:...	1/21/2022 10...	12/30/2022 1...	
		WONA02101...	5	FIN312*	Pão de passas...	3,000	3,000	0	Scheduled	0		10/3/2022 6:...	10/3/2022 4:...	1/20/2022 10...	12/30/2022 1...	
		WONA02101...	10	FIN312*	Pão de passas...	3,000	3,000	0	Scheduled	0		10/3/2022 4:...	10/4/2022 10...	1/20/2022 10...	12/30/2022 1...	

Show a complete list of all operations for scheduling, including those that had been scheduled, partially scheduled, not scheduled, over-scheduled or already scheduled and closed.
To “fish out” operations to be apply to Production Gantt.
Detailed information of each routing operation.

© 2022 The Sage Group plc, or its licensors. All rights reserved.

The Resource Gantt



Point out that each Resource (work center) can process multiple operations simultaneously.
Enable to visualize all operations scheduled on each work center.
Production Gantt showing one at a time, the Resource Gantt is further break-down of that.

© 2022 The Sage Group plc, or its licensors. All rights reserved.

Automated suggestion and analysis for improved production planning

Help better manage and prioritizing demanding customer orders

Reporting for clearer visibility on loads and output

Helps eliminate scheduling via planning board or MS Excel

Enabling multiple simulations to provide for “What-If” analysis to find the best fit schedule

Intuitive user interface with easy navigation and drag and drop

Everyone is working within a single environment with a single source of truth

Enable multiple planners working together in a single environment with segregated scheduling of production lines

Efficient way of scheduling whilst eliminating bottlenecks while scheduling

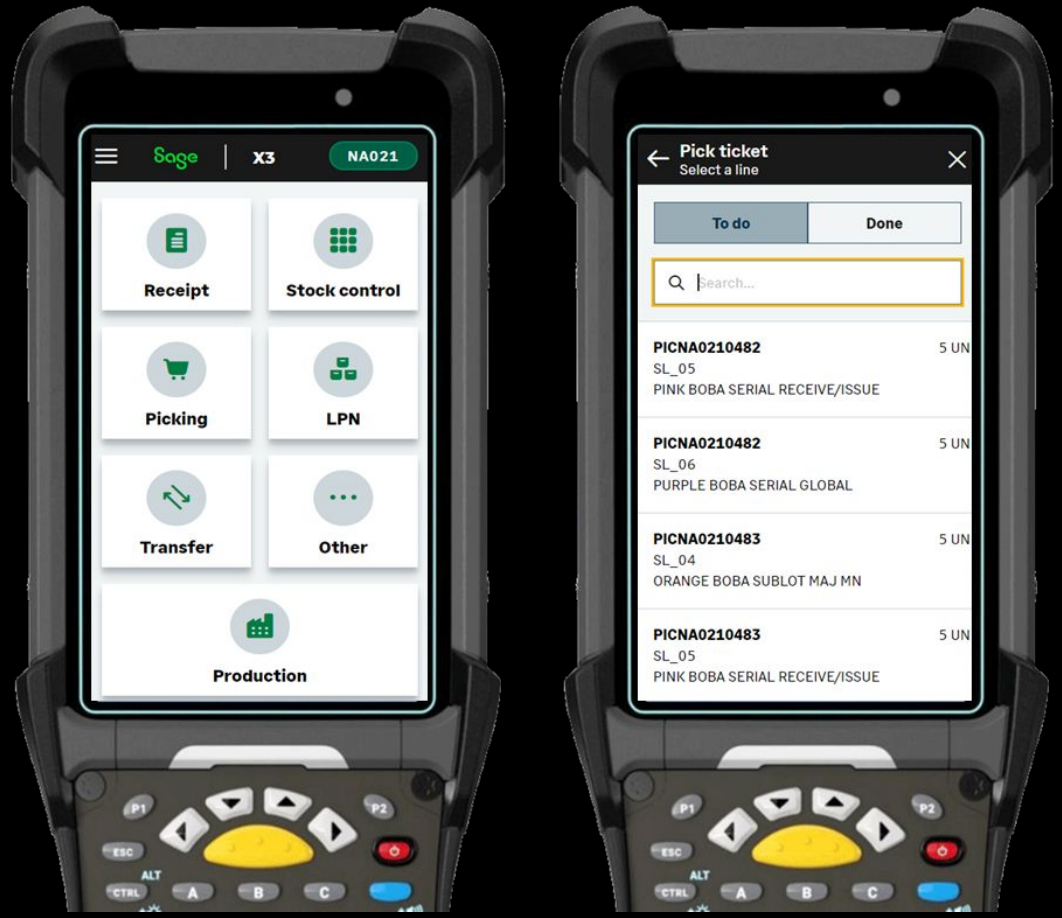
Timely prediction of disruptive events

Better management of tools

Planning and Engineering department co-op better

Mobile Automation for Sage X3
Domain: Distribution and Manufacturing

- Redevelopment of the Sage X3 Data Collection modules
  - 20 distribution scenarios
  - 5 Manufacturing scenarios
  - 12 Shop Floor Tracking scenarios
- Adaptive experiences
- Workflow and management by exception
- Adoption of native device capabilities e.g. geolocation
- Native App wrapper technology



© 2022 The Sage Group plc, or its licensors. All rights reserved.

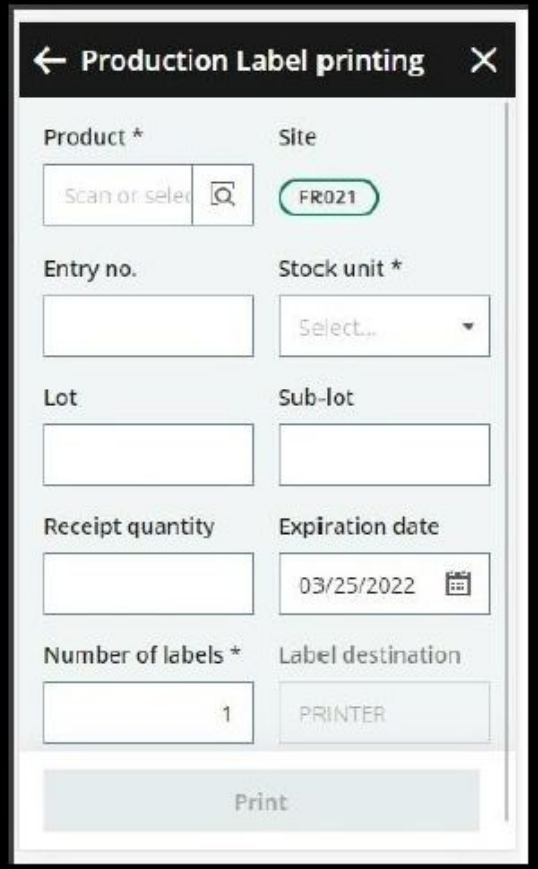
Mobile Automation
“Production label printing”

stock site: only display the current site
Product (mandatory): scan or select a product existing on the site
Entry no. (optional): scan or enter..
Stock unit (mandatory): select...
Lot (optional): scan or enter..
Sub-lot (optional): scan or enter..
Receipt quantity: enter any value
Expiration date: by default, initiate with today date

Number of labels: enter any value (by default equal to 1)

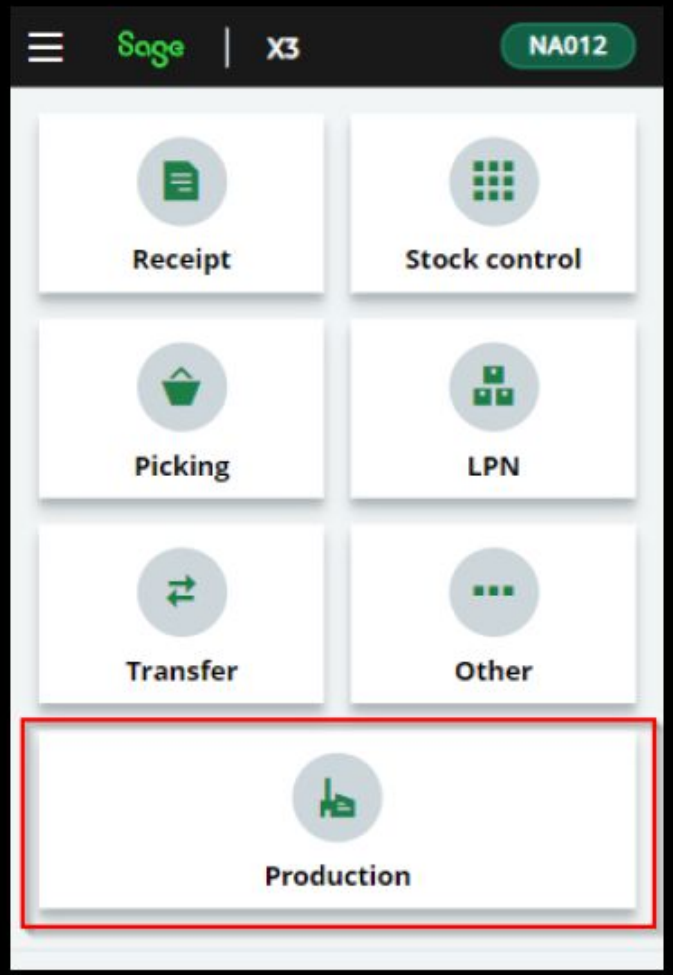
Label destination: by default, the one from the mobile user's profile.

Button "print" => launch the printing of the labels

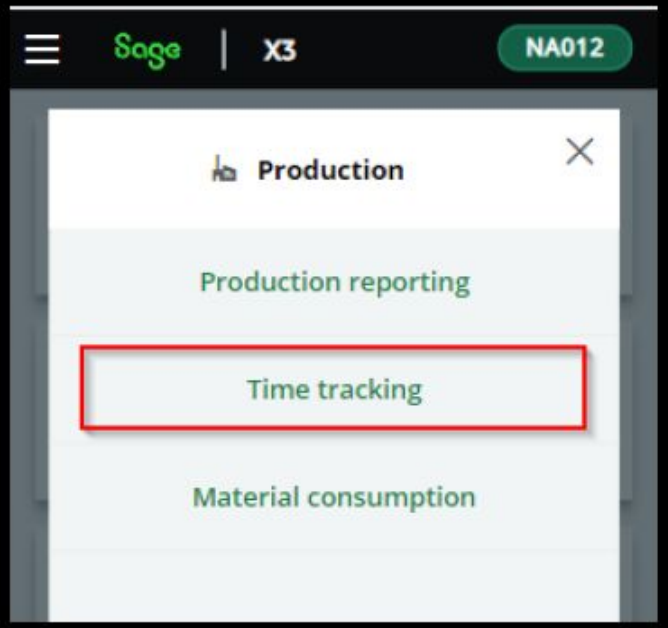


© 2022 The Sage Group plc, or its licensors. All rights reserved.

Mobile Automation - WO tracking: Time tracking



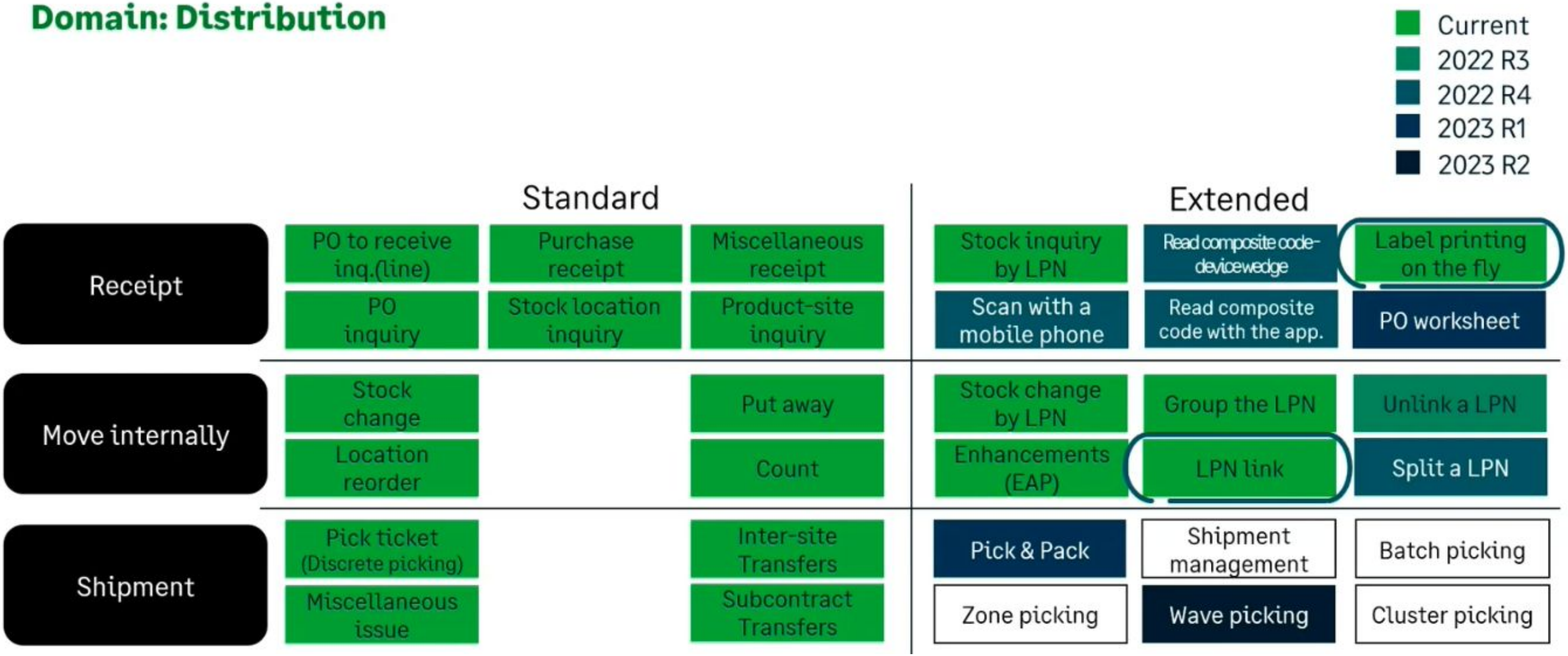
New mobile automation function



© 2022 The Sage Group plc, or its licensors. All rights reserved.

Mobile Automation

Domain: Distribution



© 2022 The Sage Group plc, or its licensors. All rights reserved.

Sage X3 PJM

Introduction

Introduction

1) The PJM solution primarily made to cater for needs in MTO/ ETO industry sector

2) The solution introduces 2 new structures regarding the existing CRM oriented projects

- ❑ The Cost Breakdown Structure (CBS) with multi-level budgets, to manage project costs
- ❑ The Work and Product breakdown Structure (PBS and WBS) with multi-level tasks, to manage the operational and manufacturing processes.

Sage

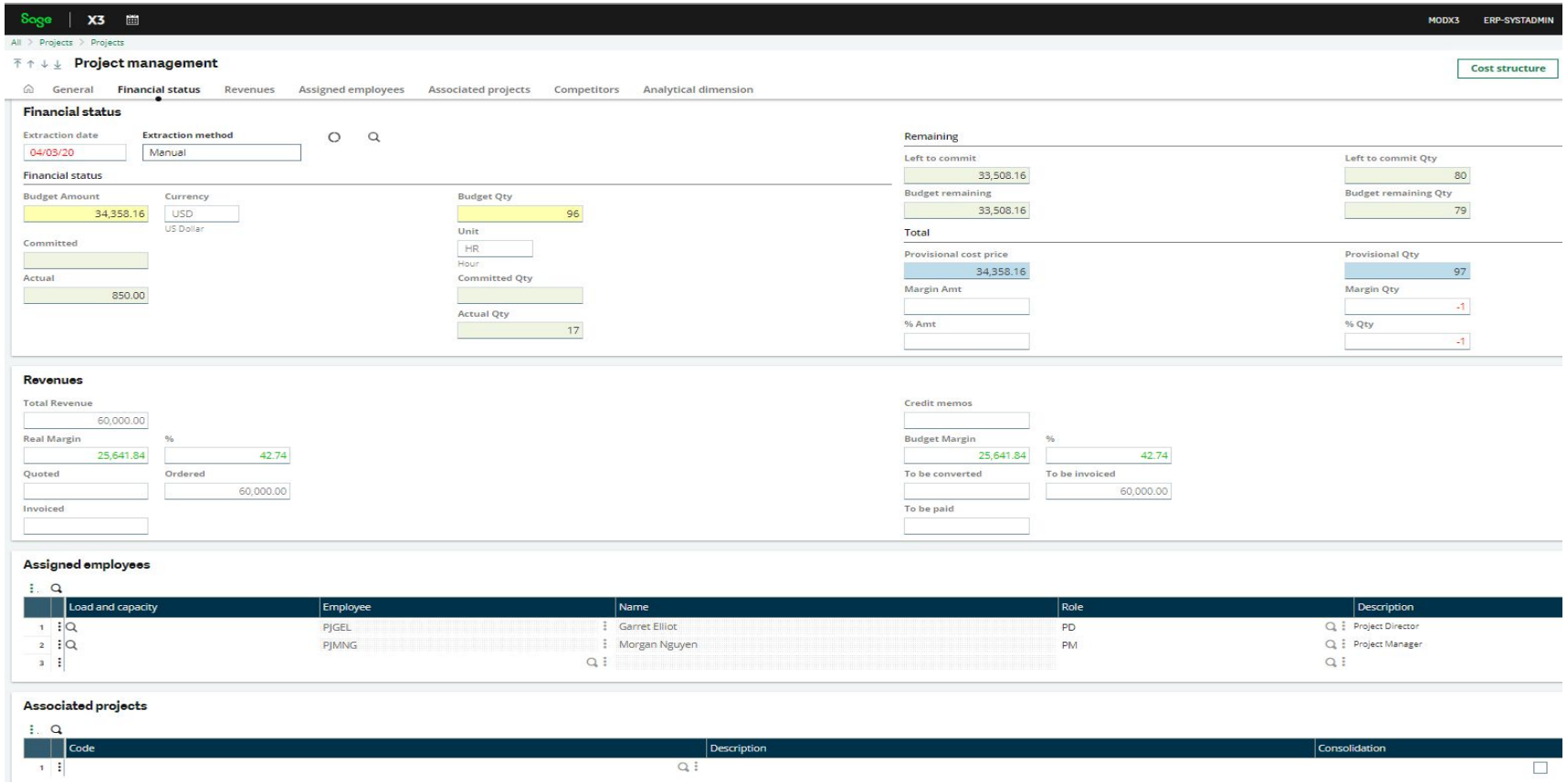
© 2022 The Sage Group plc, or its licensors. All rights reserved.

What's new?

Project Management

Sage X3 | Version 12.0

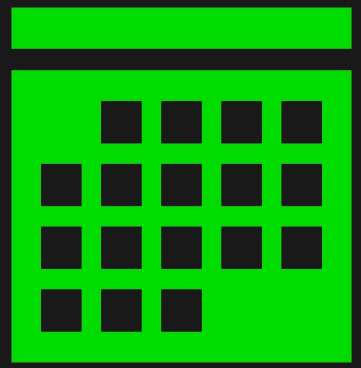
Project Management (PJM) Enhancements focused on financial control, budget management and snapshot management. This allows for improved cost management and better control of project profitability.



© 2022 The Sage Group plc, or its licensors. All rights reserved.

What's new?

Project Management



Sage X3 | Version 12.0

Project Management (PJM) Enhancements focused on financial control, budget management and snapshot management. This allows for improved cost management and better control of project profitability.

Financial Tracking –

- Multi projects consolidation in Financial overview
- Financial snapshot and comparison
- Global tree view of tasks and budgets assignments for a project

Project Planning –

- Task dependencies / Task operation dependencies
- Project baseline snapshot
- Graphical timeline of the task planning

Reporting –

- KPIs (sales margin analysis, budgets, commitments...)

© 2022 The Sage Group plc, or its licensors. All rights reserved.

Projects Budget Situation

MY PROJECTS : REVENUE SITUATION

16 Results Display: 10 1 2

Project number	Description	Quote in progre...	Ordered	Invoiced	To
FR0111609000001	RTC Rotating Tower Crane 40M (En/Fr)	0	359,905.6	359,905.6	
FR0111610000004	RTC-2 Tower Crane 40M (En)	0	242,200	220,000	
FR0111610000005	RTC-2 Rotating Tower Crane 40M (Fr)	0	0	0	
FR0111610000008	RTC Rotating Tower Crane 40M (En)	0	0	0	
FR0131611000014	Chain conveyor KD47	22,761	27,313	27,313	
FR0131612000015	Chain conveyor LK 27	0	0	0	
FR0131612000017	Convoyeur à chaines Z405	0	0	0	
FR0131701000020	Convoyeur à chaines DM 455	0	27,250	27,250	
GB0131612000018	Chain conveyor LK 12	0	27,250	27,250	
GB0131612000019	Chain conveyor LK 12 B	0	27,250	27,250	

MY PROJECTS: MARGIN SITUATION

20 Results Display: 10 1 2

Project number	Description	Budget margin	Budget on total
FR0111609000001	RTC Rotating Tower Crane 40M (En/Fr)	4,859	-18,284
FR0111609000001	RTC Rotating Tower Crane 40M (En/Fr)	-84,004	-127,528
FR0111610000004	RTC-2 Tower Crane 40M (En)	5,780	5,560
FR0111610000004	RTC-2 Tower Crane 40M (En)	5,780	760
FR0111610000005	RTC-2 Rotating Tower Crane 40M (Fr)	0	0

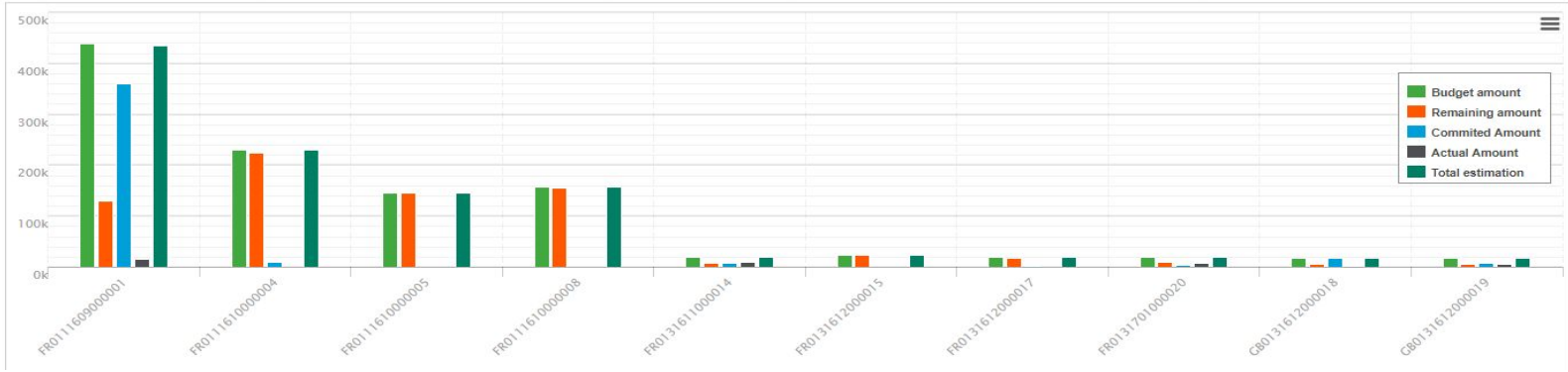
MY PROJECTS : BUDGET SITUATION

Project number	Description	Budget amount	Rema
FR0111609000001	RTC Rotating Tower Crane 40M (En/Fr)	439,049.77	
FR0111610000004	RTC-2 Tower Crane 40M (En)	230,640	
FR0111610000005	RTC-2 Rotating Tower Crane 40M (Fr)	146,550	
FR0111610000008	RTC Rotating Tower Crane 40M (En)	157,284.36	
FR0131611000014	Chain conveyor KD47	20,142	
FR0131612000015	Chain conveyor LK 27	23,794.14	
FR0131612000017	Convoyeur à chaines Z405	20,140.45	
FR0131701000020	Convoyeur à chaines DM 455	20,240.45	
GB0131612000018	Chain conveyor LK 12	17,095	
GB0131612000019	Chain conveyor LK 12 B	17,195	

MY PROJECTS : BUDGET SITUATION

16 Results Display: 10 1 2

Project number	Description	Budget amount	Remaining amount	Commited Amount	Actual Amount	Total estimation
FR0111609000001	RTC Rotating Tower Crane 40M (En/Fr)	439,049.77	129,496.19	360,925.13	15,295.99	435,782.33
FR0111610000004	RTC-2 Tower Crane 40M (En)	230,640	224,540	10,540	800	231,080
FR0111610000005	RTC-2 Rotating Tower Crane 40M (Fr)	146,550	146,550	0	0	146,550
FR0111610000008	RTC Rotating Tower Crane 40M (En)	157,284.36	156,429.96	448.56	598.08	157,476.6
FR0131611000014	Chain conveyor KD47	20,142	8,233.83	8,026.8	9,414.84	20,142
FR0131612000015	Chain conveyor LK 27	23,794.14	23,794.14	0	0	23,794.14
FR0131612000017	Convoyeur à chaines Z405	20,140.45	18,623.86	1,398	118.59	20,140.45
FR0131701000020	Convoyeur à chaines DM 455	20,240.45	10,696.16	3,638.25	8,537.54	20,240.45
GB0131612000018	Chain conveyor LK 12	17,095	6,661.02	17,048.69	2,645.65	17,095
GB0131612000019	Chain conveyor LK 12 B	17,195	6,122.72	8,274.49	5,914.35	17,195



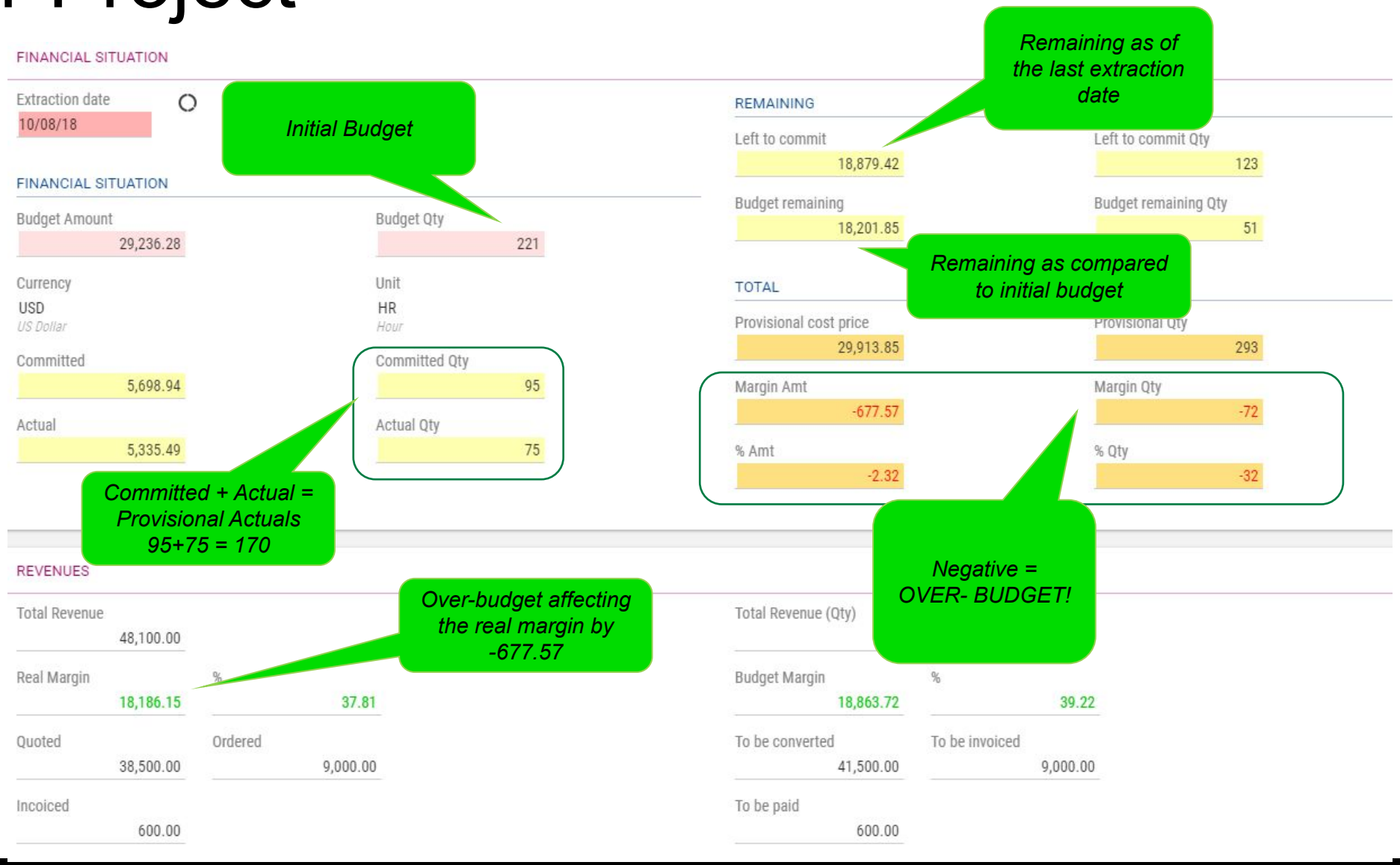
© 2022 The Sage Group plc, or its licensors. All rights reserved.

Monitor your Project

Directly from the project header you can have at first sight a summary of the main figures of the project regarding its financial situation and its revenues

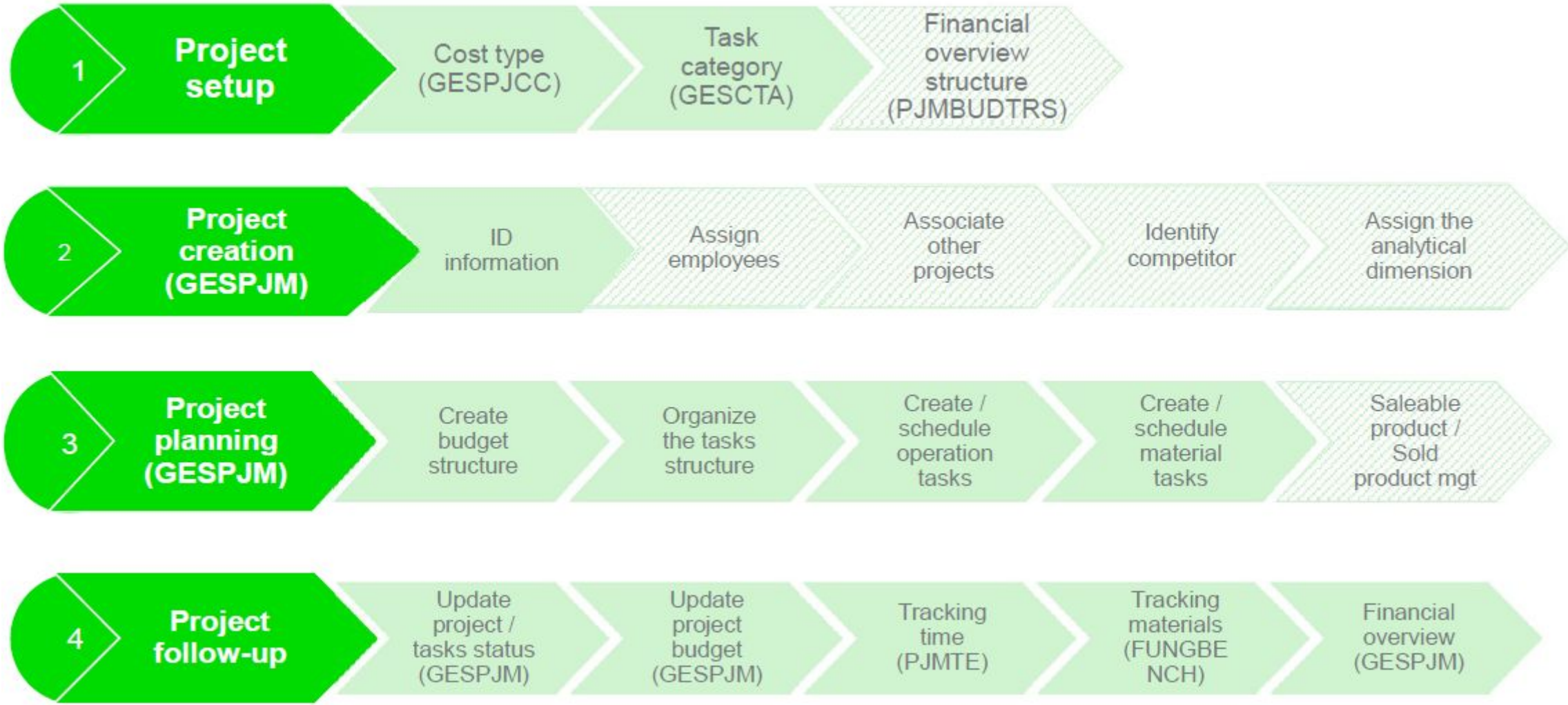
The project manager can see the overall budget of the project, the level of their commitment and actuals. He can also see the left to commit and the instant margin

In the revenue part the PM can track the evolution of the billing and the margin of the project



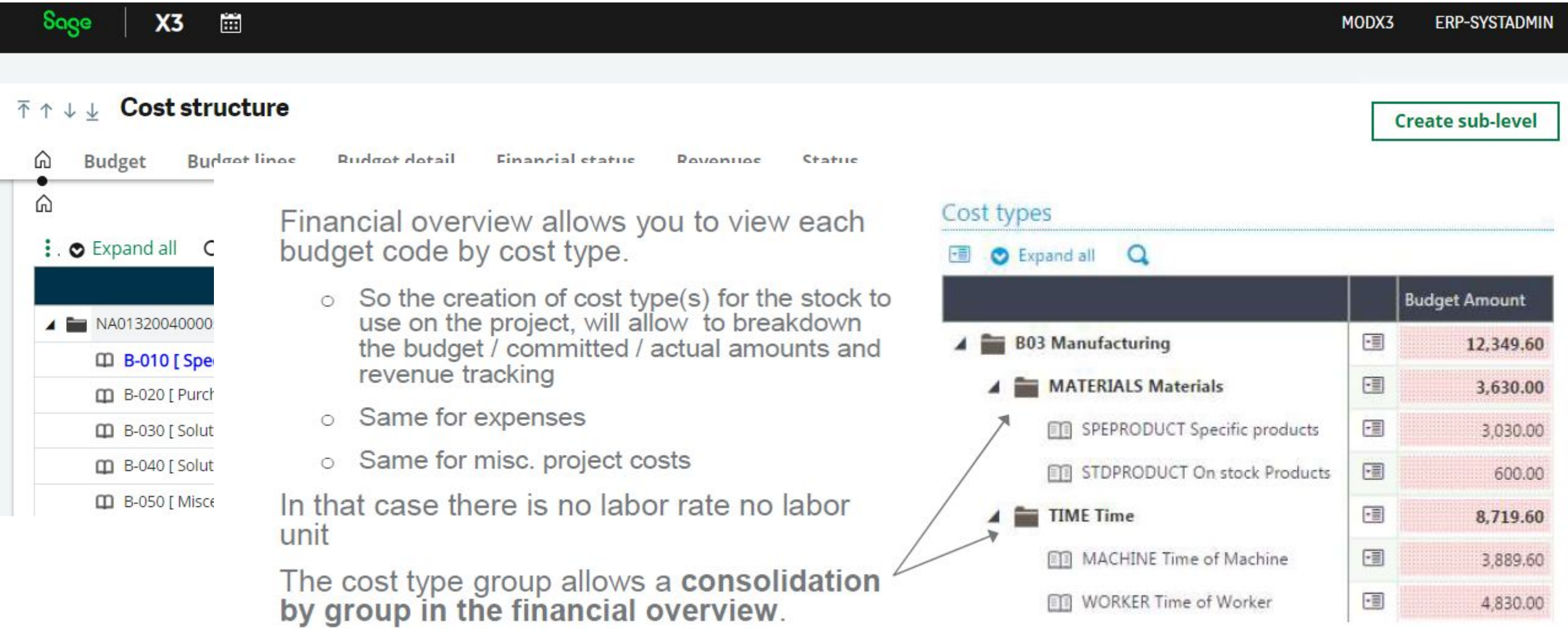
© 2022 The Sage Group plc, or its licensors. All rights reserved.

Project Phases in PJM



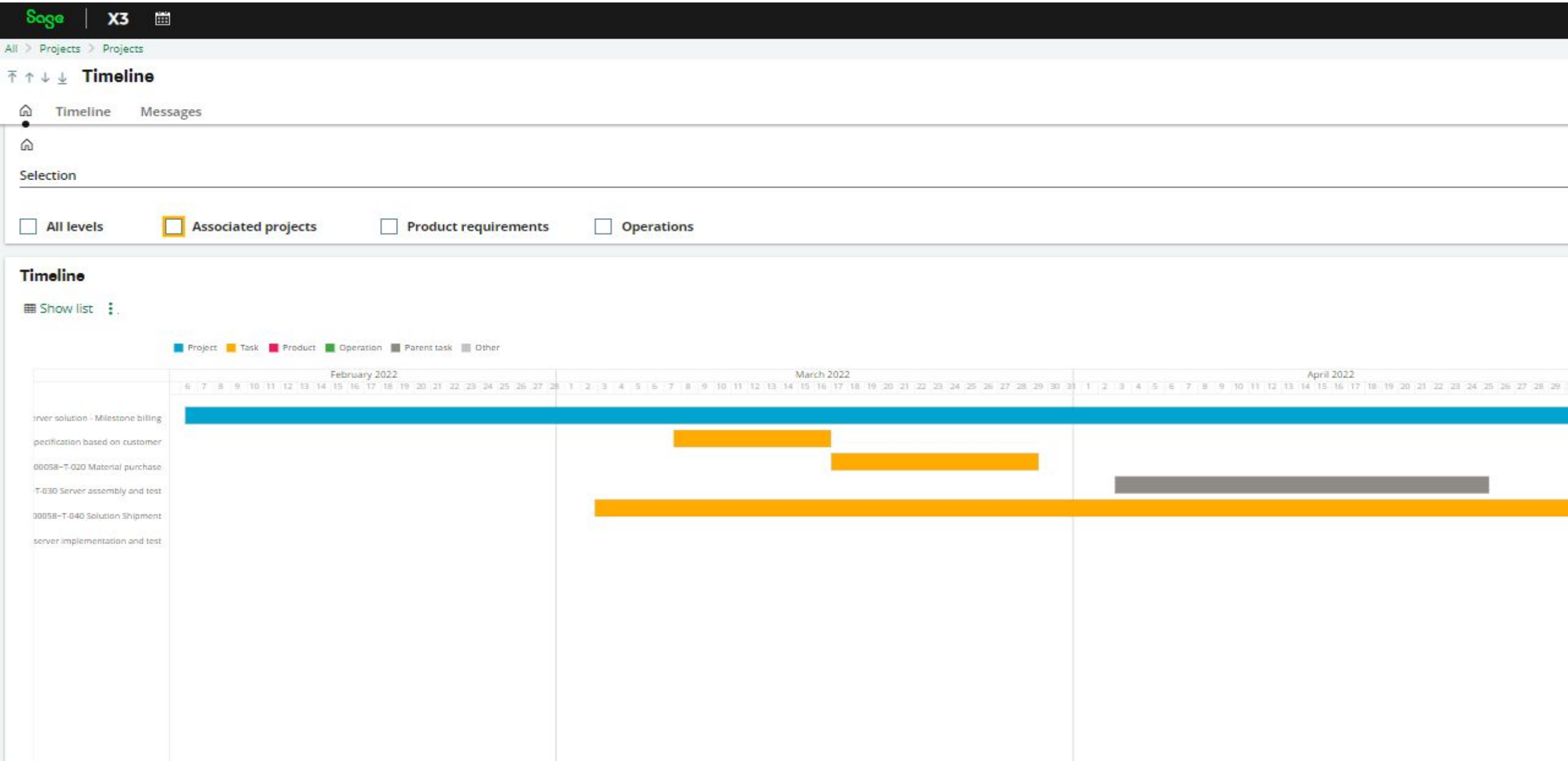
© 2022 The Sage Group plc, or its licensors. All rights reserved.

Helps in Project Initialization

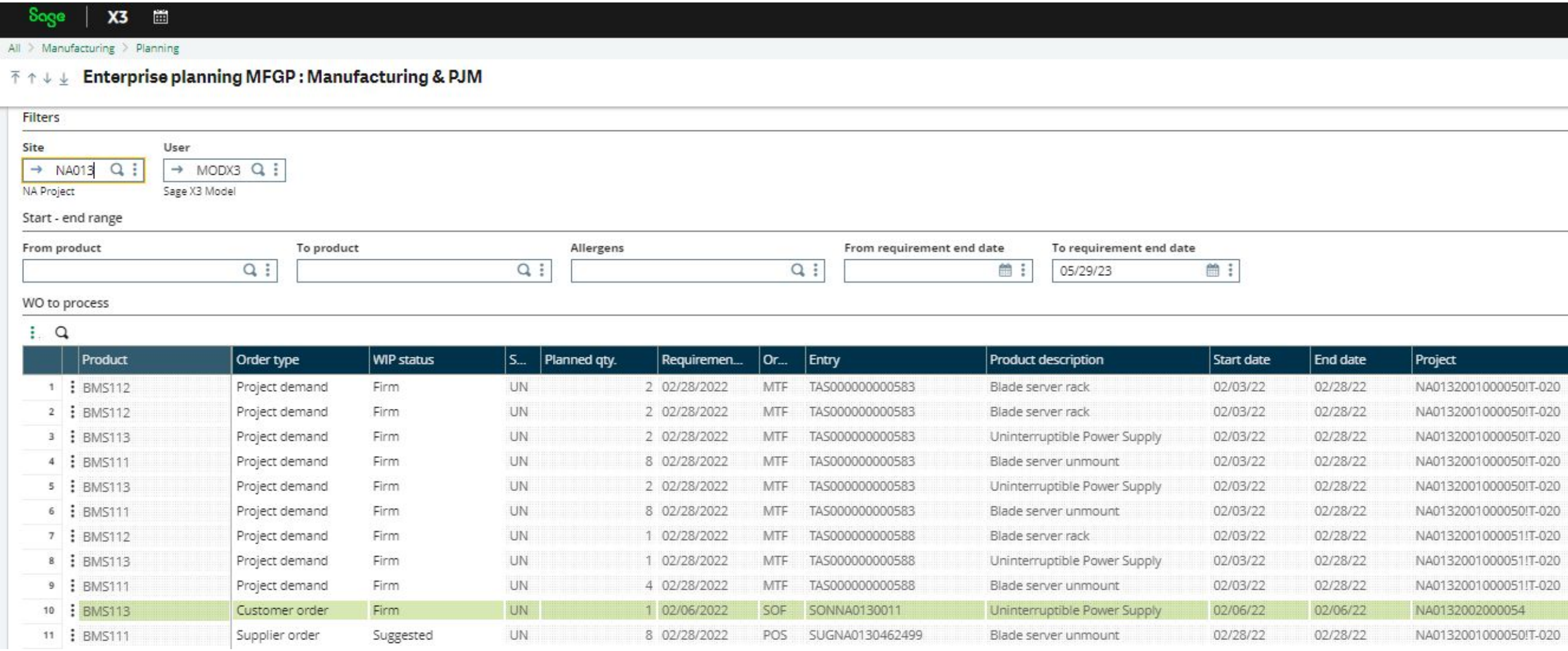


© 2022 The Sage Group plc, or its licensors. All rights reserved.

Project Timeline



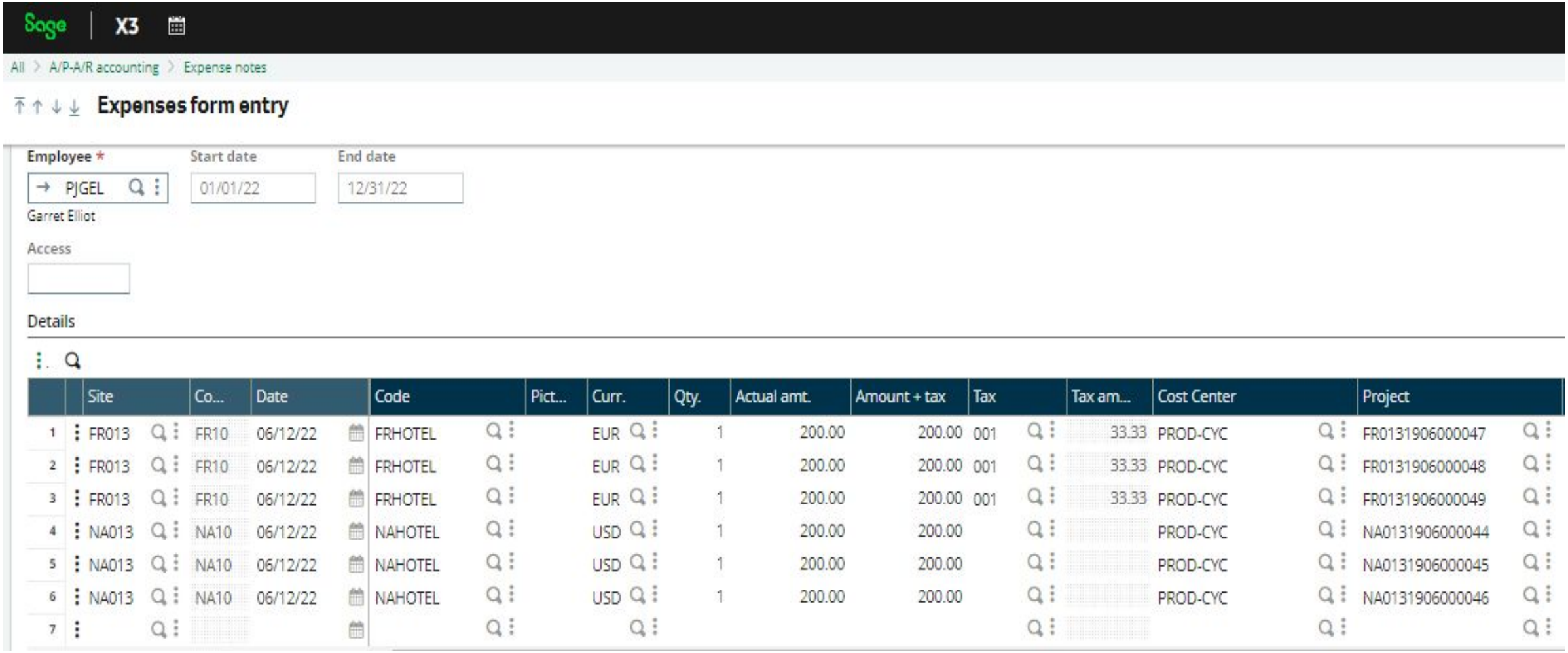
Materials Planning as per project



	Product	Order type	WIP status	S...	Planned qty.	Requiremen...	Or...	Entry	Product description	Start date	End date	Project
1	BMS112	Project demand	Firm	UN	2	02/28/2022	MTF	TAS0000000000583	Blade server rack	02/03/22	02/28/22	NA0132001000050!T-020
2	BMS112	Project demand	Firm	UN	2	02/28/2022	MTF	TAS0000000000583	Blade server rack	02/03/22	02/28/22	NA0132001000050!T-020
3	BMS113	Project demand	Firm	UN	2	02/28/2022	MTF	TAS0000000000583	Uninterruptible Power Supply	02/03/22	02/28/22	NA0132001000050!T-020
4	BMS111	Project demand	Firm	UN	8	02/28/2022	MTF	TAS0000000000583	Blade server unmount	02/03/22	02/28/22	NA0132001000050!T-020
5	BMS113	Project demand	Firm	UN	2	02/28/2022	MTF	TAS0000000000583	Uninterruptible Power Supply	02/03/22	02/28/22	NA0132001000050!T-020
6	BMS111	Project demand	Firm	UN	8	02/28/2022	MTF	TAS0000000000583	Blade server unmount	02/03/22	02/28/22	NA0132001000050!T-020
7	BMS112	Project demand	Firm	UN	1	02/28/2022	MTF	TAS0000000000588	Blade server rack	02/03/22	02/28/22	NA0132001000051!T-020
8	BMS113	Project demand	Firm	UN	1	02/28/2022	MTF	TAS0000000000588	Uninterruptible Power Supply	02/03/22	02/28/22	NA0132001000051!T-020
9	BMS111	Project demand	Firm	UN	4	02/28/2022	MTF	TAS0000000000588	Blade server unmount	02/03/22	02/28/22	NA0132001000051!T-020
10	BMS113	Customer order	Firm	UN	1	02/06/2022	SOF	SONNA0130011	Uninterruptible Power Supply	02/06/22	02/06/22	NA0132002000054
11	BMS111	Supplier order	Suggested	UN	8	02/28/2022	POS	SUGNA0130462499	Blade server unmount	02/28/22	02/28/22	NA0132001000050!T-020

© 2022 The Sage Group plc, or its licensors. All rights reserved.

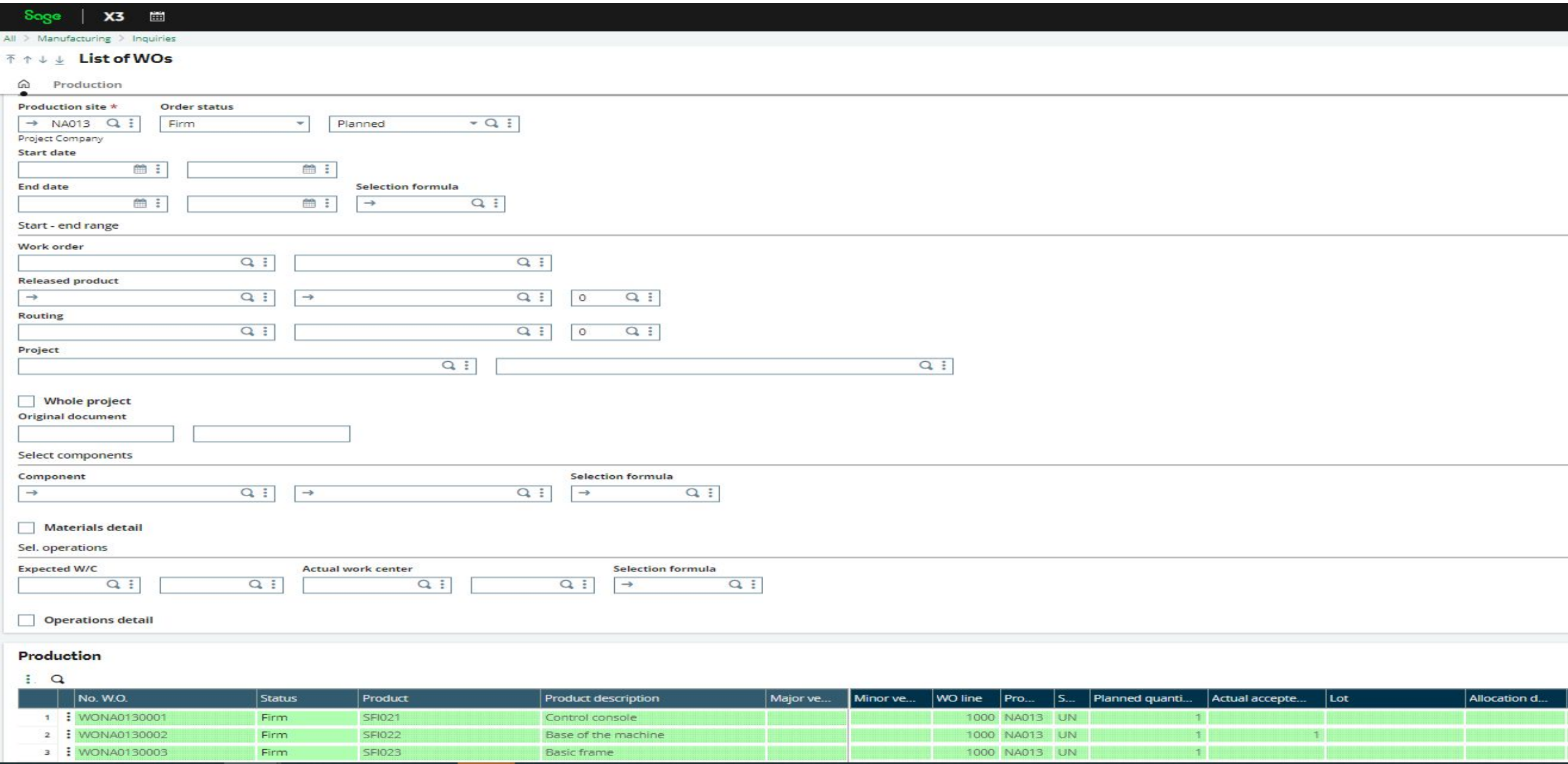
Expense entry per project



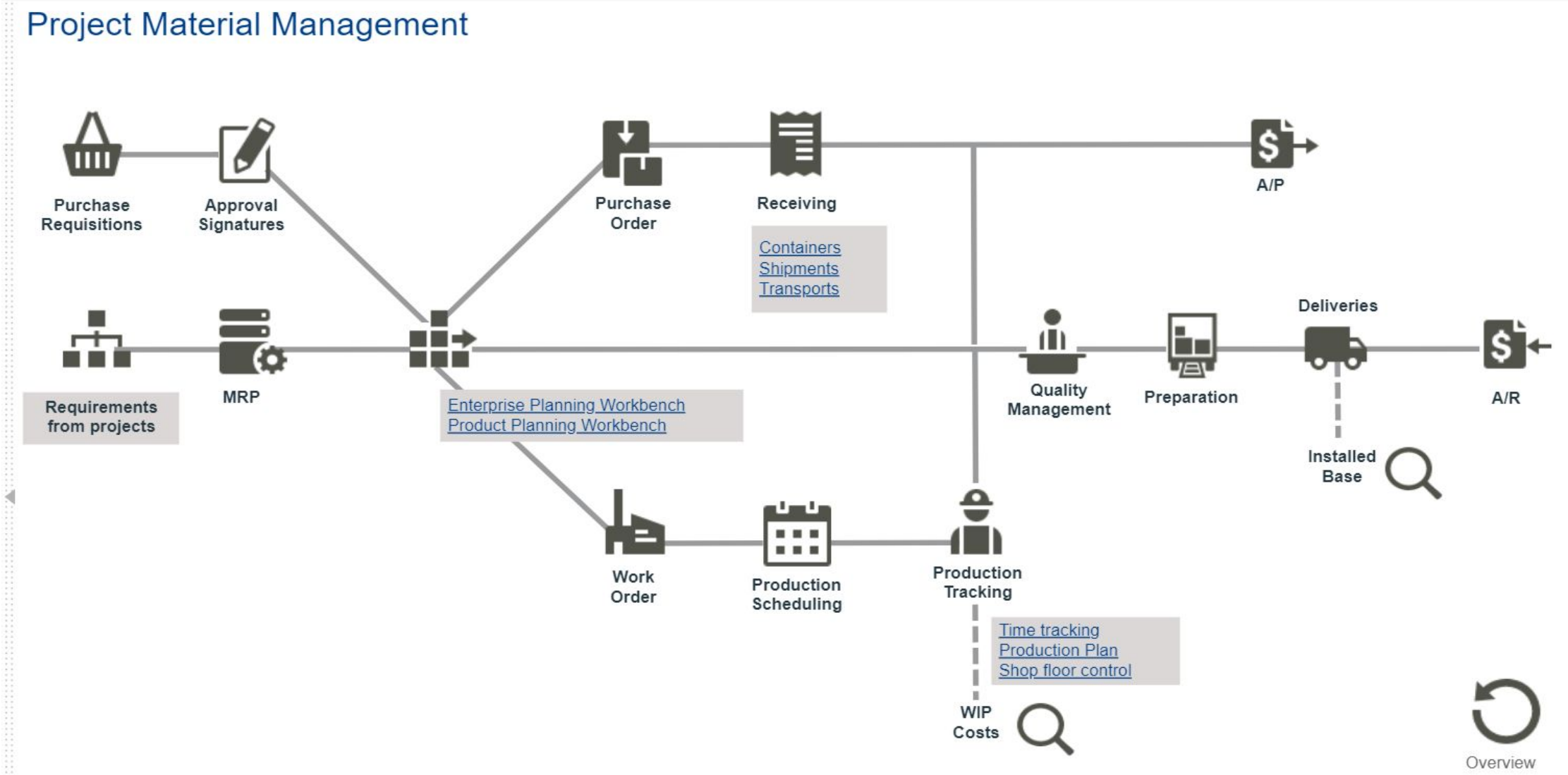
	Site	Co...	Date	Code	Pict...	Curr.	Qty.	Actual amt.	Amount + tax	Tax	Tax am...	Cost Center	Project
1	FR013	FR10	06/12/22	FRHOTEL		EUR	1	200.00	200.00	001	33.33	PROD-CYC	FR0131906000047
2	FR013	FR10	06/12/22	FRHOTEL		EUR	1	200.00	200.00	001	33.33	PROD-CYC	FR0131906000048
3	FR013	FR10	06/12/22	FRHOTEL		EUR	1	200.00	200.00	001	33.33	PROD-CYC	FR0131906000049
4	NA013	NA10	06/12/22	NAHOTEL		USD	1	200.00	200.00			PROD-CYC	NA0131906000044
5	NA013	NA10	06/12/22	NAHOTEL		USD	1	200.00	200.00			PROD-CYC	NA0131906000045
6	NA013	NA10	06/12/22	NAHOTEL		USD	1	200.00	200.00			PROD-CYC	NA0131906000046
7													

© 2022 The Sage Group plc, or its licensors. All rights reserved.

Traceability from Project to WOs



PJM – Visual Process Flow



© 2022 The Sage Group plc, or its licensors. All rights reserved.

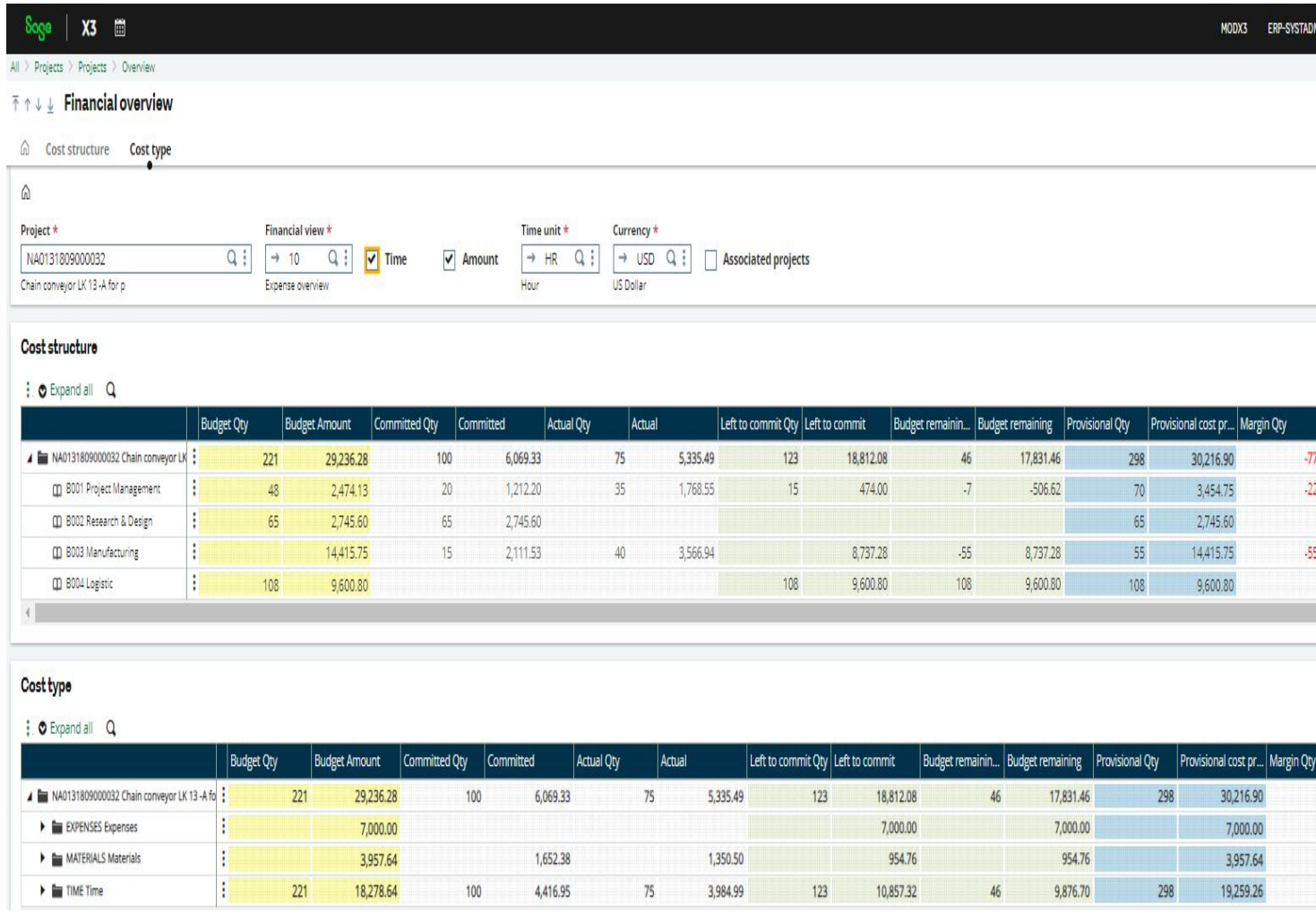
Financial overview

The PM can have this accuracy for all the budgets of a project or the project and its associated ones at the same time.

We can see there that our project is associated to another one

If we go to the financial overview of the project, we can see then the details of all the budgets of the project and their cost type.

As we have already seen we can justify by the detail the position of all the cost type

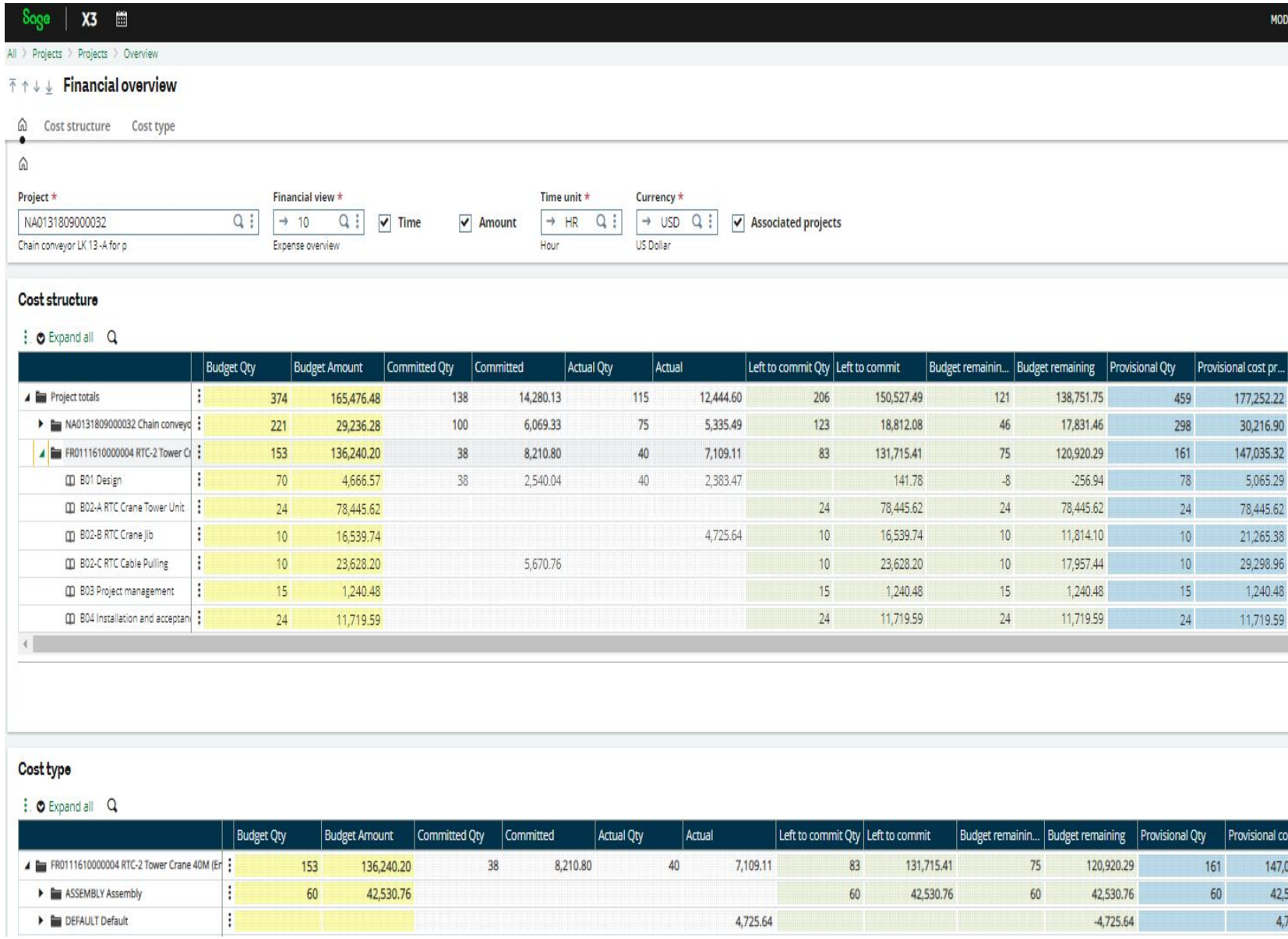


© 2022 The Sage Group plc, or its licensors. All rights reserved.

Financial overview - Expenses

In the financial overview you can combined all the associated projects

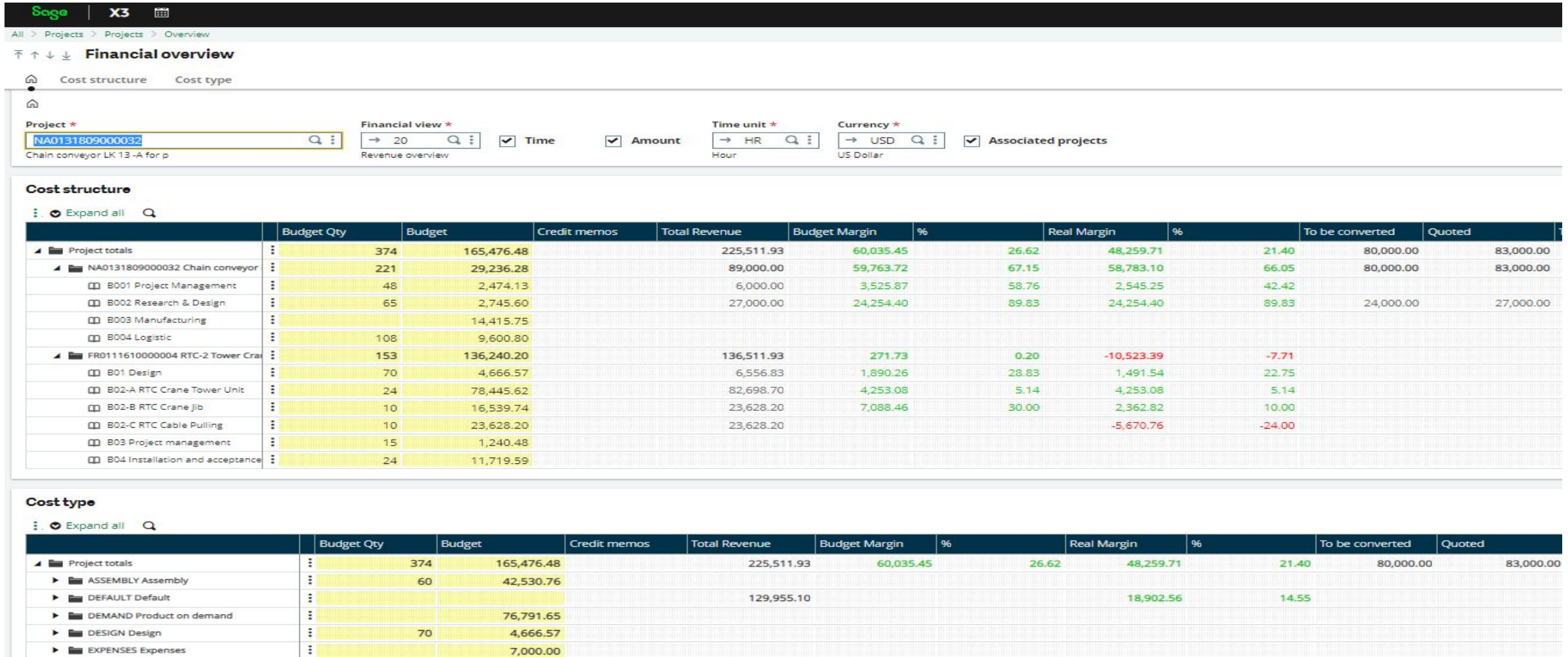
If you select “project total” you can analyzed all the projects or you still can work project by project selecting the line of the project you want to investigate



Financial overview - Revenue

Of you select the financial view 20 you can track the revenue of a project and its related one

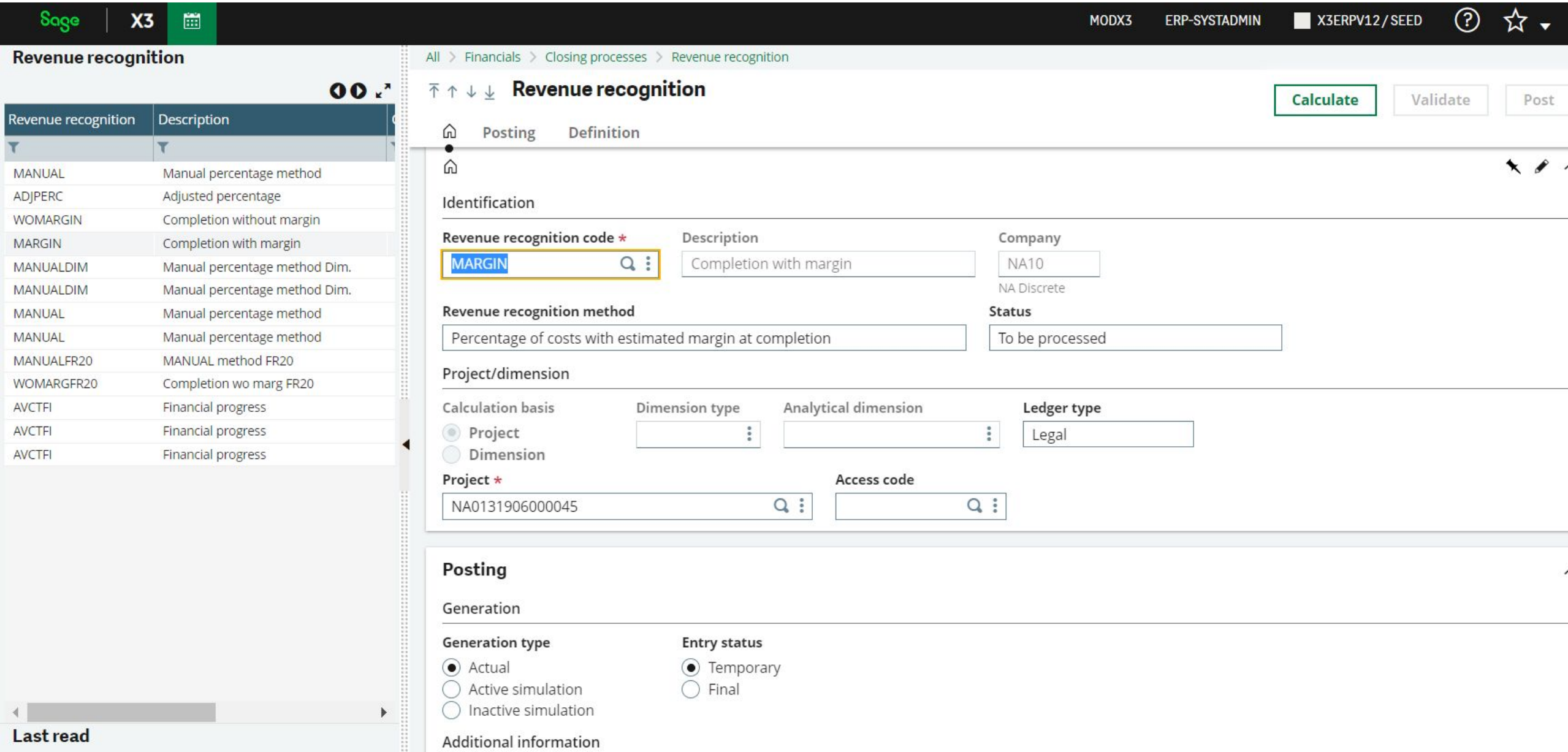
You can see there that the revenue of a project can match a dedicated budget



	Budget Qty	Budget	Credit memos	Total Revenue	Budget Margin	%	Real Margin	%	To be converted	Quoted
Project totals	374	165,476.48		225,511.93	60,035.45	26.62	48,259.71	21.40	80,000.00	83,000.00
NA0131809000032 Chain conveyor	221	29,236.28		89,000.00	59,763.72	67.15	58,783.10	66.05	80,000.00	83,000.00
B001 Project Management	48	2,474.13		6,000.00	3,525.87	58.76	2,545.25	42.42		
B002 Research & Design	65	2,745.60		27,000.00	24,254.40	89.83	24,254.40	89.83	24,000.00	27,000.00
B003 Manufacturing		14,415.75								
B004 Logistic	108	9,600.80								
FR0111610000004 RTC-2 Tower Cra	153	136,240.20		136,511.93	271.73	0.20	-10,523.39	-7.71		
B01 Design	70	4,666.57		6,556.83	1,890.26	28.83	1,491.54	22.75		
B02-A RTC Crane Tower Unit	24	78,445.62		82,698.70	4,253.08	5.14	4,253.08	5.14		
B02-B RTC Crane Jib	10	16,539.74		23,628.20	7,088.46	30.00	2,362.82	10.00		
B02-C RTC Cable Pulling	10	23,628.20		23,628.20			-5,670.76	-24.00		
B03 Project management	15	1,240.48								
B04 Installation and acceptance	24	11,719.59								

	Budget Qty	Budget	Credit memos	Total Revenue	Budget Margin	%	Real Margin	%	To be converted	Quoted
Project totals	374	165,476.48		225,511.93	60,035.45	26.62	48,259.71	21.40	80,000.00	83,000.00
ASSEMBLY Assembly	60	42,530.76								
DEFAULT Default				129,955.10			18,902.56	14.55		
DEMAND Product on demand		76,791.65								
DESIGN Design	70	4,666.57								
EXPENSES Expenses		7,000.00								

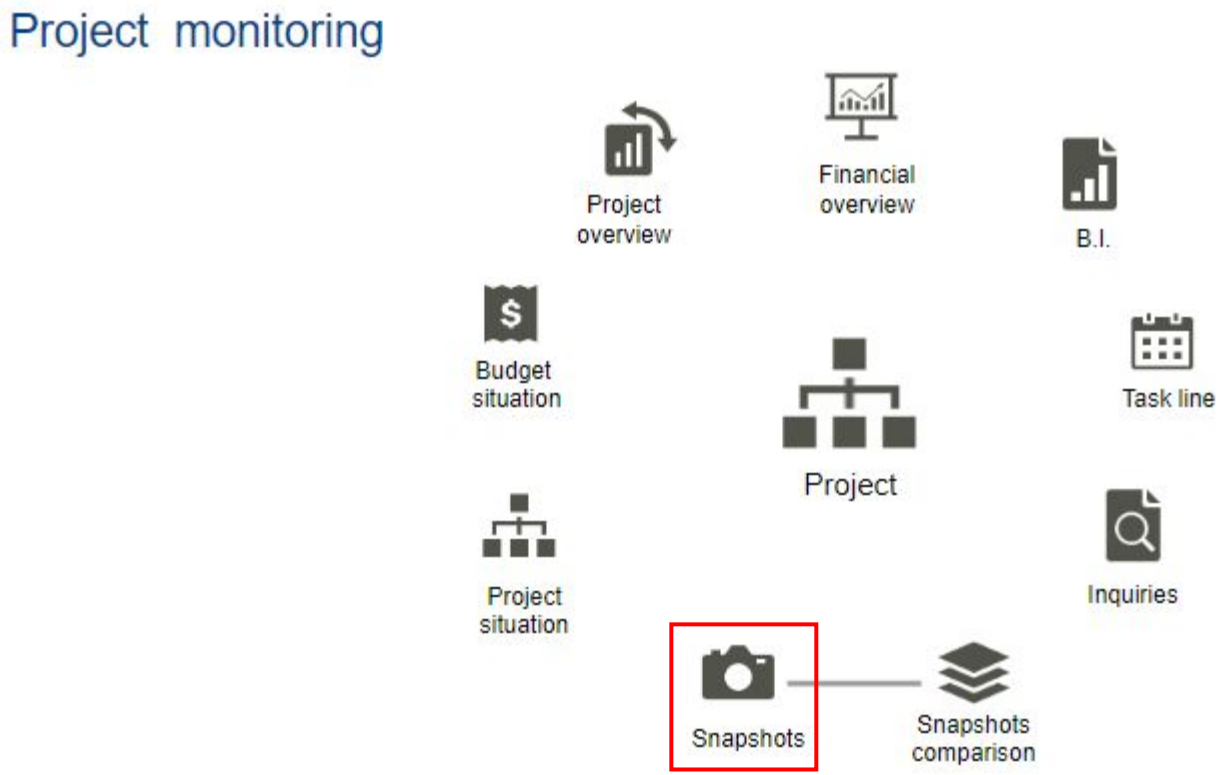
Revenue Recognition Calculation



Snapshots

It is also very interesting for a Project Manager to make during the time of the project comparison of a project position.

For that the PM can create as many “snapshots” of project , compare a snapshot with another or a snapshot with the current position of the project



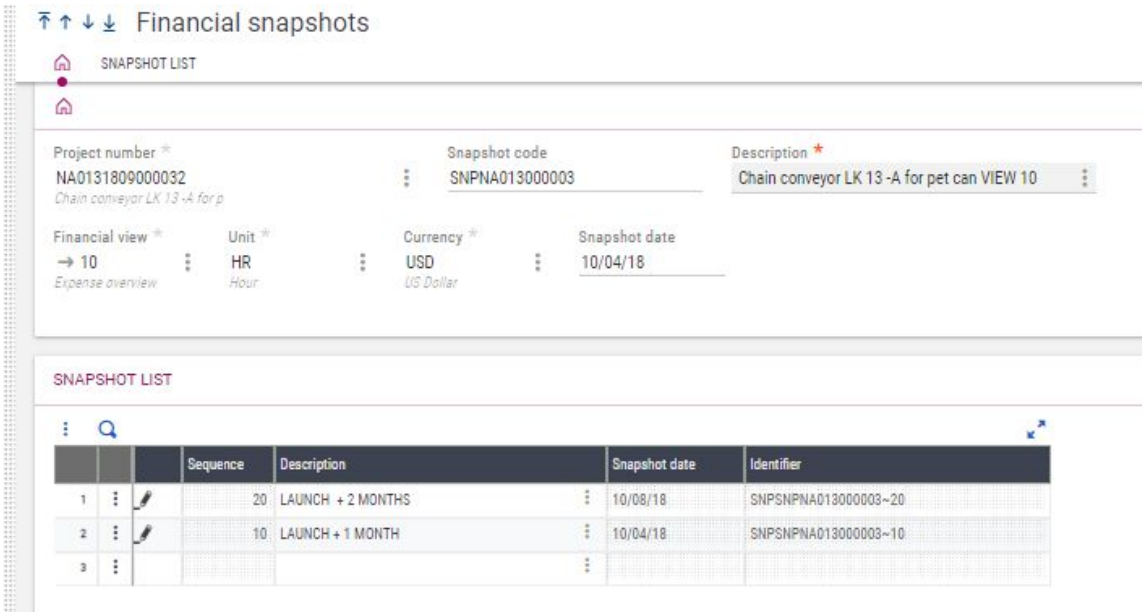
© 2022 The Sage Group plc, or its licensors. All rights reserved.

Snapshots

During the lifetime of a project we can create as many snapshot you want per project / financial view

We can see there that we have two snapshots for our project for the financial overviews 10 with and two for the same project and the financial overview 20

View	Project	Code
20	NA0131809000032	SNPNA013000004
10	NA0131809000032	SNPNA013000003
20	FR0111609000001	SNPFR011000002
10	FR0111609000001	SNPFR011000001



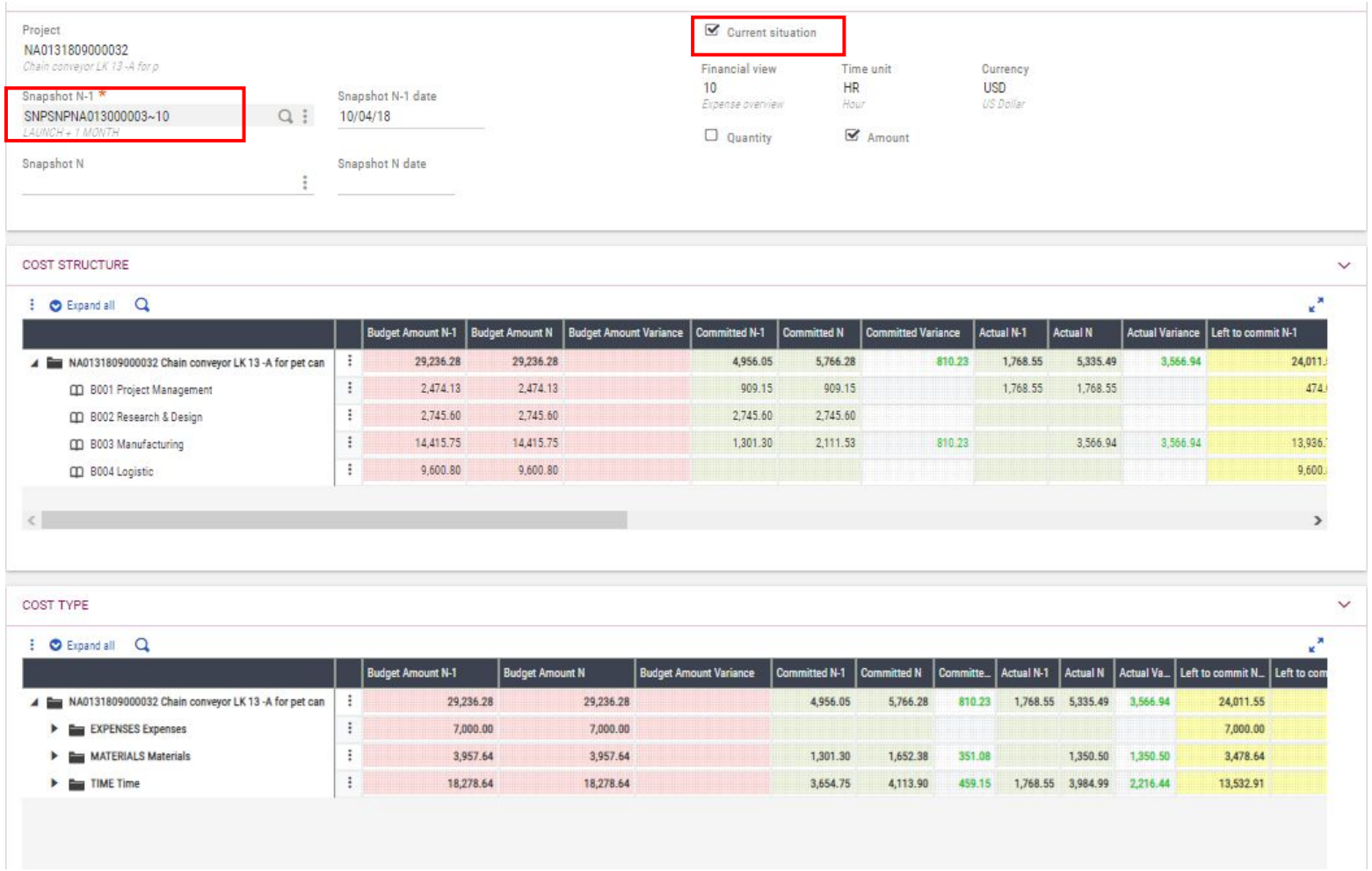
© 2022 The Sage Group plc, or its licensors. All rights reserved.

Snapshots

In the comparison function you can compare any snapshot of a project with its current situation, or compare two snapshots

In the grid for each column of the financial report you have a column “Variance” that let you appreciate the evolution between two positions

In the grid “COST TYPE” you see in more detail the cost type that originated the variance.



© 2022 The Sage Group plc, or its licensors. All rights reserved.

Benefits of Project Job Manufacturing

1) **Manages entire project** by planning, and tracking with Work and Product breakdown structure (WBS & PBS) and also Cost breakdown structure (CBS) and keeping detail planning information (i.e. planned duration of each task, resources needed, products sold…etc

2) Serve as a **central repository** for multiple departments to have unified visibility.

3) **Budget Control** – to ensure project is on time on budget. Inquiries & Notification when budget is exceeded – at macro or micro level, in terms of time and values.

4) Report and Analytics - Manage changes and visibility of changes in project.

5) **Increase Efficiency** - Ease of Planning and Purchasing of Materials, quick creation of sales document & work orders, project time and expenses direct link to Financials.

6) **Traceability -** tracking of Sales/Purchasing/Production/CRM documents from Project.

© 2022 The Sage Group plc, or its licensors. All rights reserved.

Thanks

© 2022 The Sage Group plc or its licensors. All rights reserved.
Sage, Sage logos, and Sage product and service names mentioned herein are the trademarks of Sage Global Services Limited or its licensors. All other trademarks are the property of their respective owners.