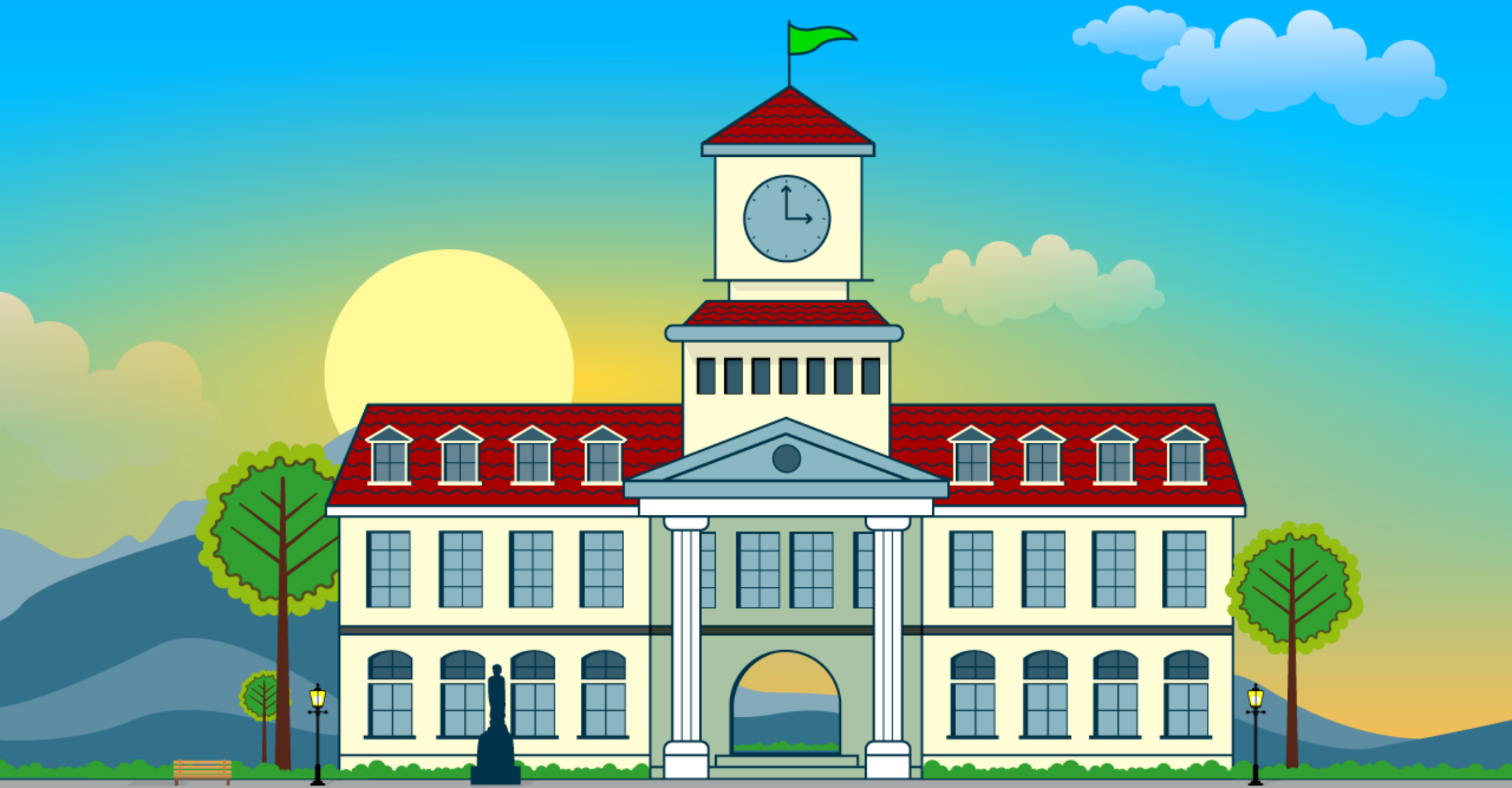
sage X3

Partner Enablement
Learning & Certification Guide

August 2021



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Learn from the experts and become one yourself.

Learning empowers and prepares all Sage partner types

At Sage, we recognize the critical role that our partners play in our own success. That's why we offer world-class Partner Enablement & Learning offerings that help us grow and thrive together. In this short guide, you can review several of the courses and Learning Paths available for people in all roles who work with Sage X3.

Learn from the experts and become one yourself.

Build your skills on Sage X3: Partner Learning that helps you succeed

Whether you are a new Sage X3 partner or an experienced consultant, SageU is the right place for you. Find out more about the training options available for your individual needs. There are so many ways to learn!

New Consultant Bootcamp

A flexible consultant enablement program to quickly prepare consultants for the field.

Expert level instruction

After you earn your product certifications and have over 12 months of practical field experience, continue through our Expert Curricula. These courses will deepen your knowledge and build upon your experience.

Instructor-Led Virtual or Classroom

Designed for users who want a step-by-step how-to. With this objective in mind, you get to practice using the software, while completing exercises.

Private Training

Bespoke training can be designed specifically to meet your organization's requirements. This can be delivered onsite or online

eLearning

Self-paced interactive courses available whenever you are.

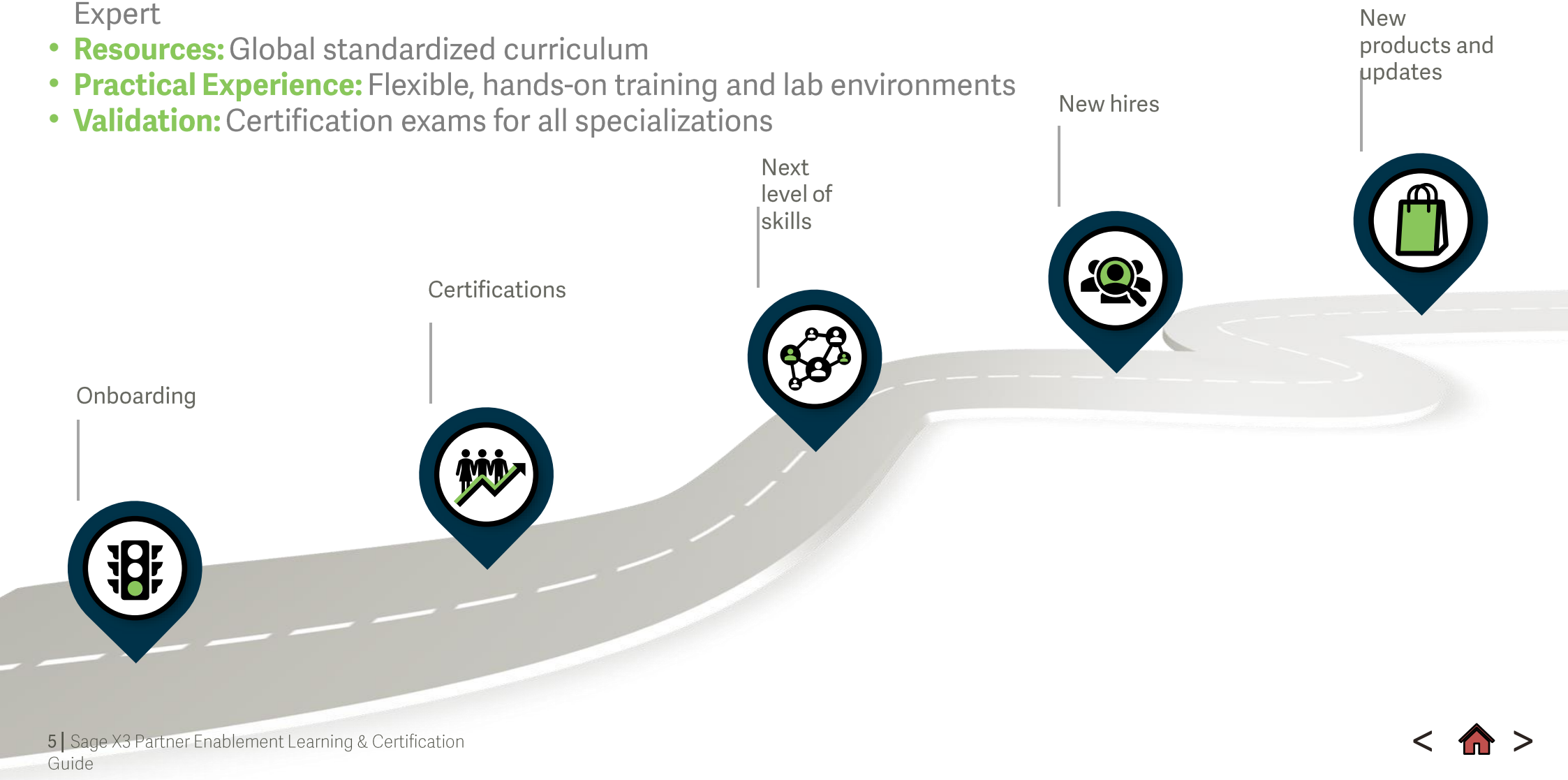
Sage University

Training when you need it

Learning for each phase of your learning life cycle or business changes.

Tools for your learning journey:

- **Curriculum:** Extensive range of course content – Getting started to Expert
- **Resources:** Global standardized curriculum
- **Practical Experience:** Flexible, hands-on training and lab environments
- **Validation:** Certification exams for all specializations



Sage X3 Partner Certifications

Benefits of certification

Holding a Sage X3 certification enables consultants with deep Sage X3 skills to validate their expertise, hone their skills and set themselves apart from others. Sage X3 certification brings professional credibility, increased earning power, greater job satisfaction, and the confidence you are on the leading edge as the solution evolves to support our customer's success.

Sage X3 certifications you can earn

Sage X3 Certified Financial Consultant

Sage X3 Certified Distribution Consultant

Sage X3 Certified Manufacturing Consultant

Sage X3 Certified Technical Consultant

Sage X3 Certified Developer

Sage X3 Certified Integration Developer

Sage X3 Certified Implementation Project Manager

Sage X3 Certifications by Partner Type

Roles	Sage X3 Required Certifications	Required Roles by Partner Type		
		Reseller	SI	ISV
Sell *Coming soon*	Sales Professional Pre-Sales Consultant	●		
Consult and Implement	Sage X3 Functional Consultant – Financials Sage X3 Functional Consultant - Distribution Sage X3 Functional Consultant - Manufacturing*	●	●	
Technical	Sage X3 Technical Consultant	●	●	
Project Manager	Sage X3 Implementation Project Manager	●	●	
Analytics	Designing Crystal Reports for X3 (Badge) Sage Enterprise Intelligence (Badge)	●	●	
Develop	Sage X3 Developer		●	●
Integrate	Sage X3 Integration Developer			●

Sage X3 Partner Certification Requirements

Minimum Required

- ✔4 certified individuals
- ✔All required certifications must be held within a partner organization, based on partner type

Expectation

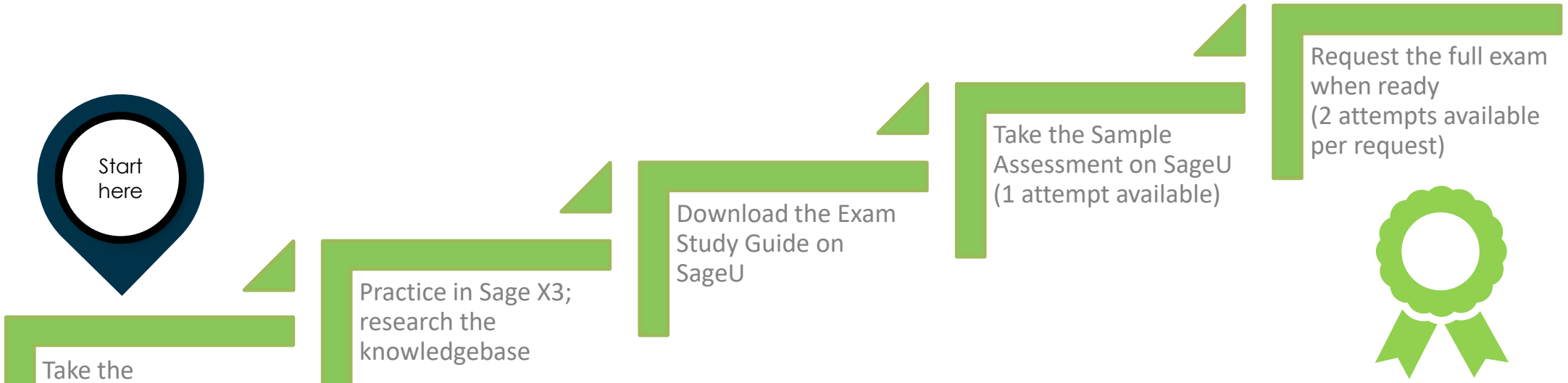
- ✔All individuals providing sales or consultant services should be certified

Customer Success Model

To adequately staff for customer success:

- ✔Average 1 certified resource per 4-6 customers

Preparing for Certification



The journey does not end here…

Becoming a Certified Consultant is the beginning of your journey as a Consultant. You will gain expertise through a combination of on-the-job experience, advanced and expert training from SageU, as well as community exposure through mentoring and sharing knowledge online and in person. The more you invest in your learning path, the brighter your future will be.

Certification Maintenance

Updating your skills

Becoming a Certified Consultant is an ongoing process. Once certified, you will be asked to maintain your skills by keeping up with new features and technology within Sage X3 and your role. Maintaining your certification relies on updating your knowledge through gap exams (certification maintenance exams) as well as your continued participation in our partner community.

There are typically two checkpoints in a year where we assess your involvement.

Maintenance requirements

- ✔Varies per year (between February and August)
- ✔Typically a required maintenance training and/or exam
- ✔Announcement will be sent to those required to complete requirements with 90 days to complete.

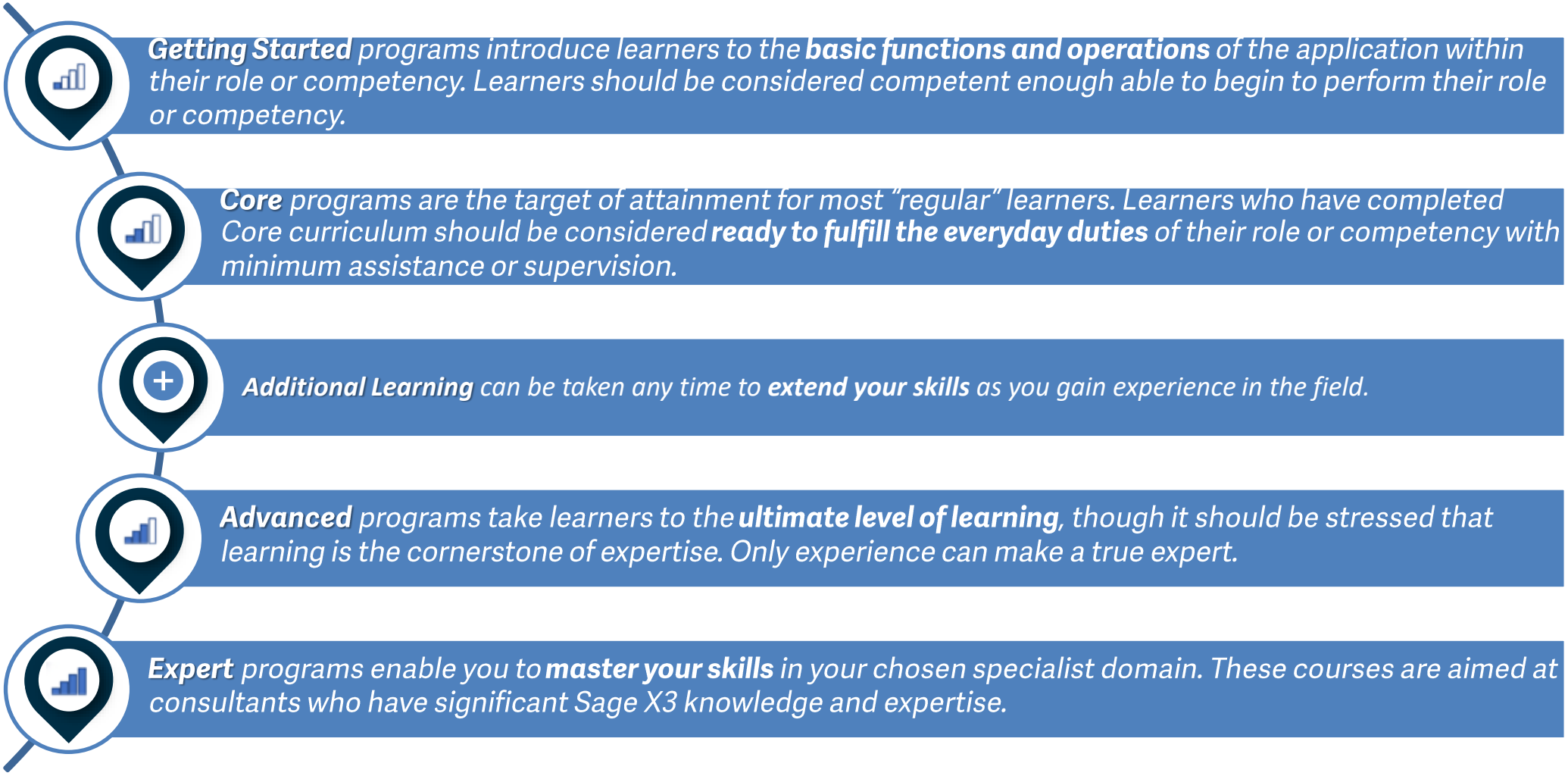
Certification renewal period

- ✔November – January
- ✔Fee* may be due
- ✔Certifications expire on February 1 unless all requirements have been completed (maintenance requirements, exams, still in partner program*)

*Varies per region, contact your Partner Representative for more information.

Sage X3 Partner Learning Curriculum

The Sage X3 Curriculum has five sections to help you navigate straight to the knowledge you need: Getting Started, Core, Advanced, Expert, and Additional.



Getting Started *programs introduce learners to the* ***basic functions and operations*** *of the application within their role or competency. Learners should be considered competent enough able to begin to perform their role or competency.*

Core *programs are the target of attainment for most "regular" learners. Learners who have completed Core curriculum should be considered* ***ready to fulfill the everyday duties*** *of their role or competency with minimum assistance or supervision.*

Additional Learning *can be taken any time to* ***extend your skills*** *as you gain experience in the field.*

Advanced *programs take learners to the* ***ultimate level of learning****, though it should be stressed that learning is the cornerstone of expertise. Only experience can make a true expert.*

Expert *programs enable you to* ***master your skills*** *in your chosen specialist domain. These courses are aimed at consultants who have significant Sage X3 knowledge and expertise.*

Sage X3 Consultant Bootcamp

Build knowledge, Build confidence, Build Relationships – Your Sage X3 journey begins here.

The Mastering Sage X3 Bootcamp is a flexible, intense consultant enablement learning program.

This boot camp provides you with the necessary core product knowledge and implementation methodology required to become a proficient, certified Implementation Consultant.

Once you've attended the core product training and achieved your certification, Sage offers additional learning to expand your core product knowledge to take your skills to the next level. Log on to Sage University to view the additional recommended training for your role.

Core Technical

- Install Sage X3 and understand system hardware and server considerations
- Learn System Administrator functions, concepts, and tools common to Sage X3 modules

Core Financials

- Learn System Administrator functions, concepts, and tools common to Sage X3 modules
- Get started with the financial functionality through hands-on labs that include setting up a new company based on a defined case study.

Core Distribution

- Get started with the distribution functionality by learning common set up and transaction of the stock management, purchasing, and sales processes
- Interactive hands-on labs help reinforce the concepts learned

Configuring a Solution

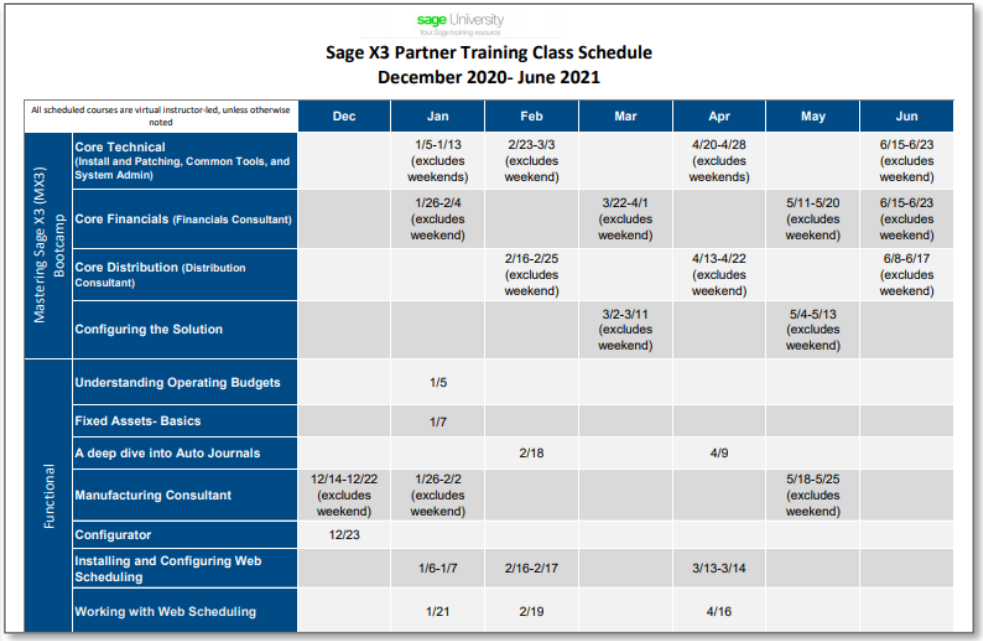
- Project Teams
- Case study business requirements
- Implementation methodology and best practice

Register for the MX3 bootcamp bundle on Sage University!

Access **Sageu.com/MX3Bootcamp** to view program guides and register

Sage X3 Partner Learning Catalog and Schedule

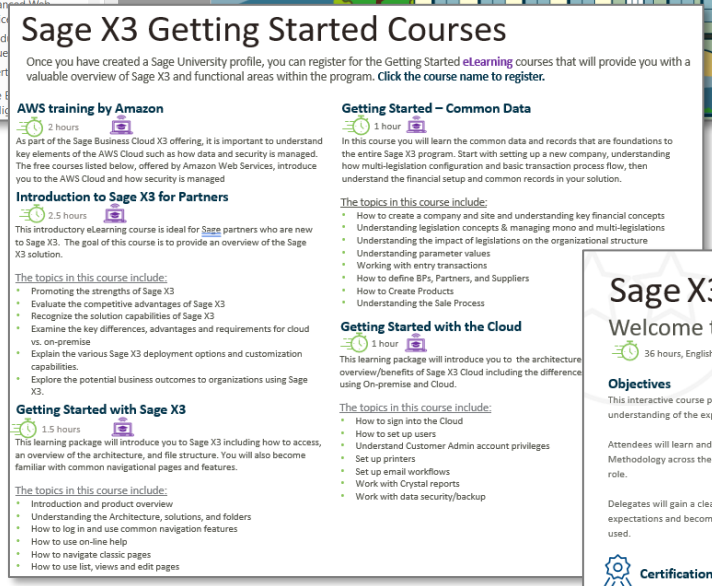
Find detailed course descriptions in the course catalog, and review course dates in the schedule on SageU.



sage University

Sage X3 Partner Training Class Schedule
December 2020- June 2021

	All scheduled courses are virtual instructor-led, unless otherwise noted	Dec	Jan	Feb	Mar	Apr	May	Jun
Mastering Sage X3 (MX3) Bootcamp	Core Technical (Install and Patching, Common Tools, and System Admin)		1/5-1/13 (excludes weekends)	2/23-3/3 (excludes weekend)		4/20-4/28 (excludes weekends)		6/15-6/23 (excludes weekend)
	Core Financials (Financials Consultant)		1/26-2/4 (excludes weekend)		3/22-4/1 (excludes weekend)		5/11-5/20 (excludes weekend)	6/15-6/23 (excludes weekend)
	Core Distribution (Distribution Consultant)			2/16-2/25 (excludes weekend)		4/13-4/22 (excludes weekend)		6/8-6/17 (excludes weekend)
	Configuring the Solution				3/2-3/11 (excludes weekend)		5/4-5/13 (excludes weekend)	
Functional	Understanding Operating Budgets		1/5					
	Fixed Assets- Basics		1/7					
	A deep dive into Auto Journals			2/18		4/9		
	Manufacturing Consultant	12/14-12/22 (excludes weekend)	1/26-2/2 (excludes weekend)				5/18-5/25 (excludes weekend)	
	Configurator	12/23						
	Installing and Configuring Web Scheduling		1/6-1/7	2/16-2/17		3/13-3/14		
	Working with Web Scheduling		1/21	2/19		4/16		



Sage X3 Getting Started Courses

Once you have created a Sage University profile, you can register for the Getting Started eLearning courses that will provide you with a valuable overview of Sage X3 and functional areas within the program. **Click the course name to register.**

AWS training by Amazon
2 hours
As part of the Sage Business Cloud X3 offering, it is important to understand key elements of the AWS Cloud such as how data and security is managed. The free courses listed below, offered by Amazon Web Services, introduce you to the AWS Cloud and how security is managed

Introduction to Sage X3 for Partners
2.5 hours
This introductory eLearning course is ideal for Sage partners who are new to Sage X3. The goal of this course is to provide an overview of the Sage X3 solution.

The topics in this course include:
- Promoting the strengths of Sage X3
- Evaluate the competitive advantages of Sage X3
- Recognize the solution capabilities of Sage X3
- Examine the key differences, advantages and requirements for cloud vs. on-premise
- Explain the various Sage X3 deployment options and customization capabilities.
- Explore the potential business outcomes to organizations using Sage X3.

Getting Started with Sage X3
1.5 hours
This learning package will introduce you to Sage X3 including how to access, an overview of the architecture, and file structure. You will also become familiar with common navigational pages and features.

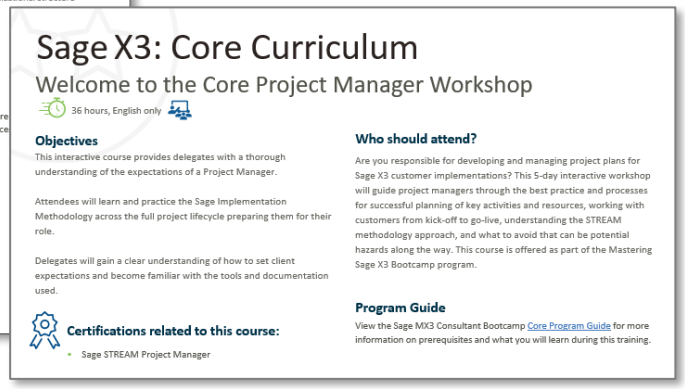
The topics in this course include:
- Introduction and product overview
- Understanding the Architecture, solutions, and folders
- How to log in and use common navigation features
- How to use on-line help
- How to navigate classic pages
- How to use list, views and edit pages

Getting Started – Common Data
1 hour
In this course you will learn the common data and records that are foundations to the entire Sage X3 program. Start with setting up a new company, understanding how multi-legislation configuration and basic transaction process flow, then understand the financial setup and common records in your solution.

The topics in this course include:
- How to create a company and site and understanding key financial concepts
- Understanding legislation concepts & managing mono and multi-legislations
- Understanding the impact of legislations on the organizational structure
- Understanding parameter values
- Working with entry transactions
- How to define BPs, Partners, and Suppliers
- How to Create Products
- Understanding the Sale Process

Getting Started with the Cloud
1 hour
This learning package will introduce you to the architecture overview/benefits of Sage X3 Cloud including the difference using On-premise and Cloud.

The topics in this course include:
- How to sign into the Cloud
- How to set up users
- Understand Customer Admin account privileges
- Set up printers
- Set up email workflows
- Work with Crystal reports
- Work with data security/backup



Sage X3: Core Curriculum

Welcome to the Core Project Manager Workshop

36 hours, English only

Objectives
This interactive course provides delegates with a thorough understanding of the expectations of a Project Manager.

Attendees will learn and practice the Sage Implementation Methodology across the full project lifecycle preparing them for their role.

Delegates will gain a clear understanding of how to set client expectations and become familiar with the tools and documentation used.

Certifications related to this course:
- Sage STREAM Project Manager

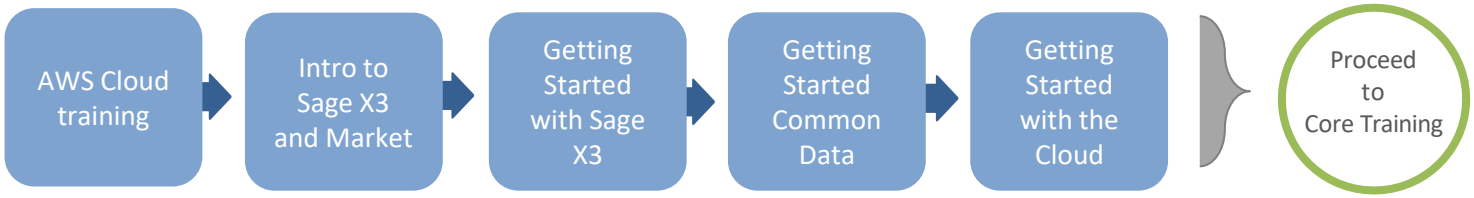
Who should attend?
Are you responsible for developing and managing project plans for Sage X3 customer implementations? This 5-day interactive workshop will guide project managers through the best practice and processes for successful planning of key activities and resources, working with customers from kick-off to go-live, understanding the STREAM methodology approach, and what to avoid that can be potential hazards along the way. This course is offered as part of the Mastering Sage X3 Bootcamp program.

Program Guide
View the Sage MX3 Consultant Bootcamp Core Program Guide for more information on prerequisites and what you will learn during this training.

Click here to see the Sage X3 **catalog** and **schedule**.

Financials Learning Path

Getting Started



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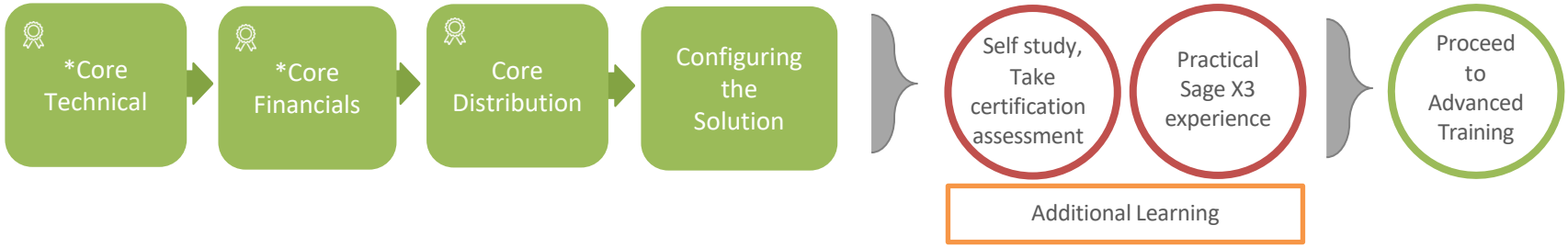

Advanced

Expert

Expert Financials

Visit SageU to register for courses and certifications

* Certification Prep Course | Instructor-led Training | eLearning | Certification track

Distribution Learning Path

Getting Started

AWS Cloud training → Intro to Sage X3 and Market → Getting Started with Sage X3 → Getting Started Common Data → Getting Started with the Cloud → Proceed to Core Training

Core

*Core Technical → Core Financials → *Core Distribution → Configuring the Solution → Self study, Take certification assessment / Practical Sage X3 experience → Proceed to Advanced Training

Additional Learning

Advanced

Advanced Common Tools → Advanced Distribution → Practical Sage X3 experience → Proceed to Expert Training

Additional Learning

Expert

Expert Distribution

Visit SageU to register for courses and certifications

* Certification Prep Course | Instructor-led Training | eLearning | Certification track

Manufacturing Learning Path

Getting Started

AWS Cloud training → Intro to Sage X3 and Market → Getting Started with Sage X3 → Getting Started Common Data → Getting Started with the Cloud → Proceed to Core Training

Core

*Core Technical → Core Financials → *Core Distribution → *Manufacturing Configurator → Self study, Take certification assessment → Practical Sage X3 experience → Proceed to Advanced Training

Additional Learning

Advanced

Advanced Common Tools → Advanced Manufacturing → Practical Sage X3 experience → Proceed to Expert Training

Additional Learning

Expert

Expert Manufacturing

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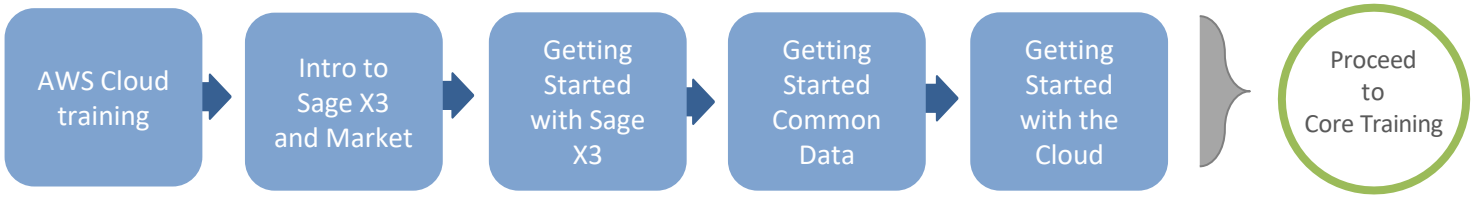
Technical Learning Path

Getting Started



Core

Advanced

Expert

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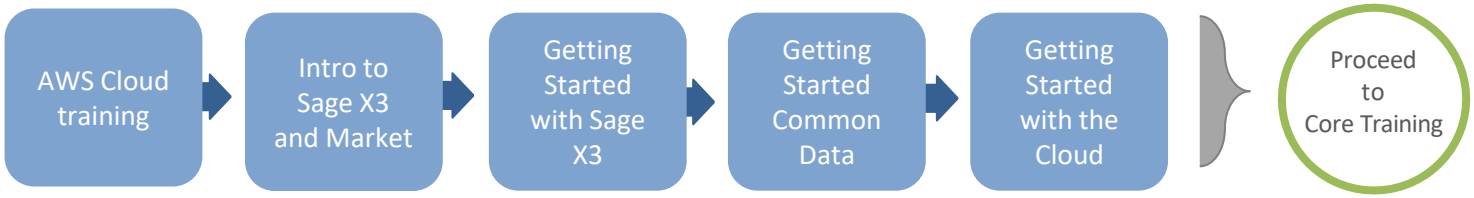
Developer Learning Path

Getting Started



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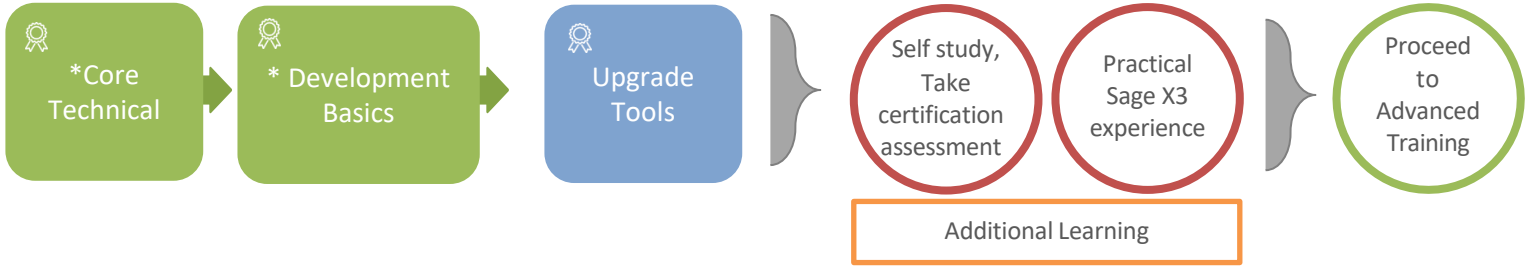

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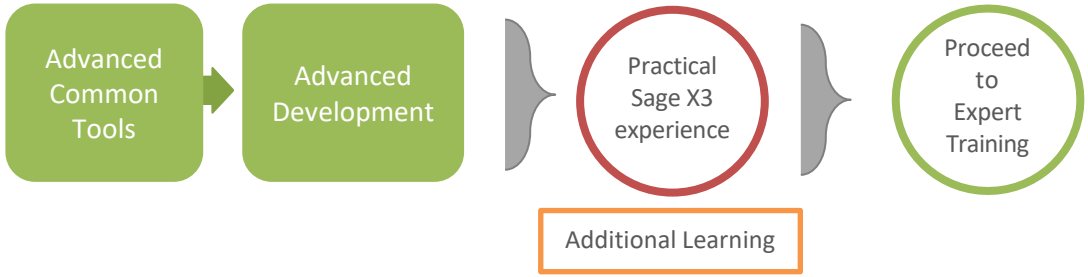

Expert

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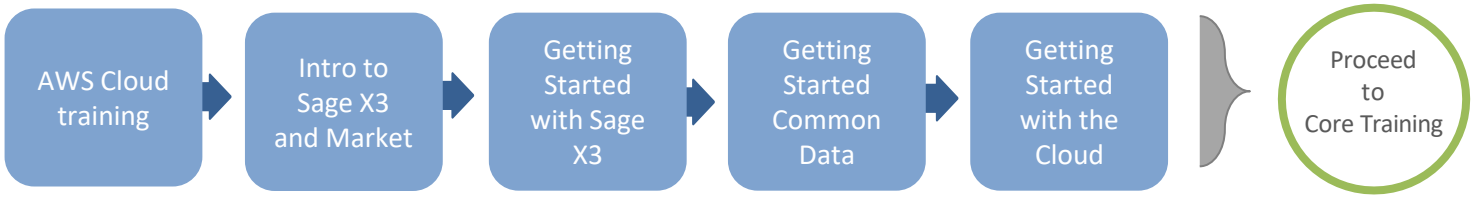
Integration Developer Learning Path

Getting Started



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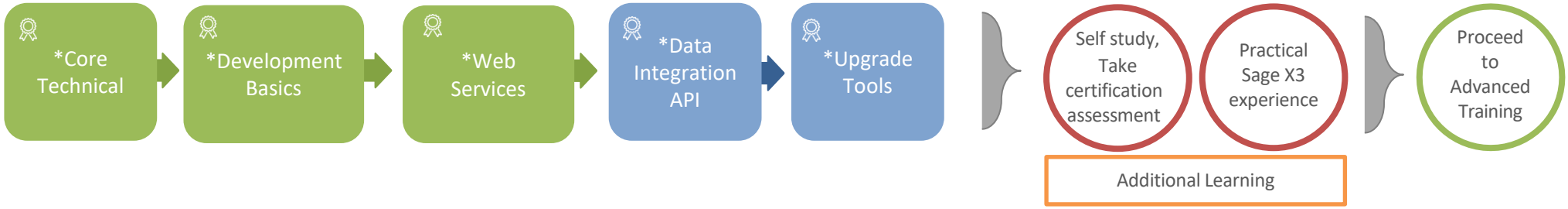
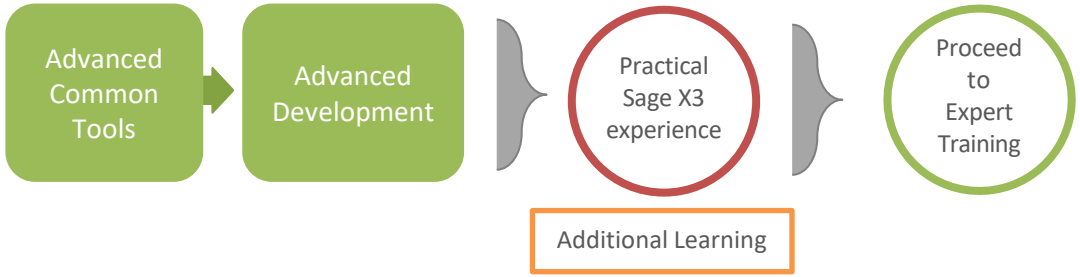


Advanced



Expert

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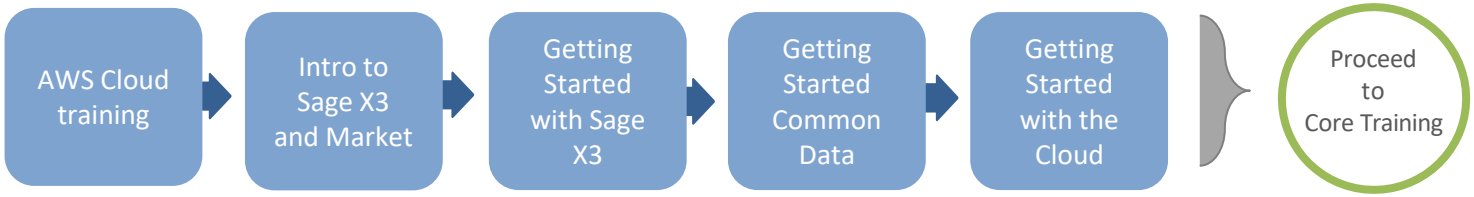
Implementation Project Manager Learning Path

Getting Started



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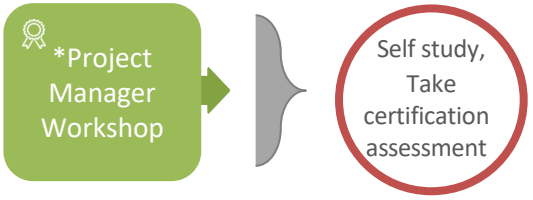

Additional Resources

Visit SageU to register for courses and certifications

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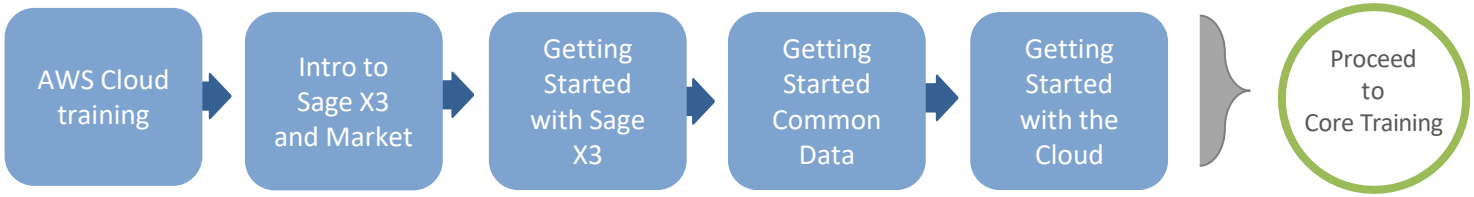
Sales Learning Path

Getting Started



Core

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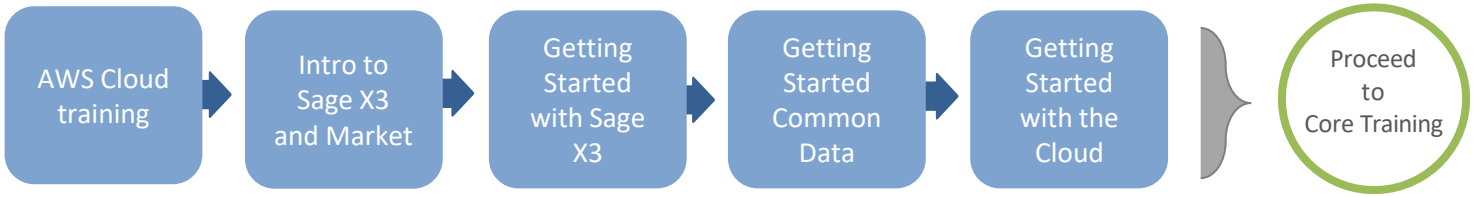
Pre-Sales Learning Path

Getting Started



Core

Visit SageU to register for courses and certifications

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Next Steps

How to get started

To find out more and to register for a course, go to www.sageu.com. From this central location, you can view program details, register for courses, track learning progress, register for certification when your training is complete, and access additional helpful resources.

Summary

As a valued Consultant, Sage is committed to your success and the success of your customers. The Sage X3 Skills Development Program is designed to be a value-add resource from the moment you begin with Sage X3, so you can quickly and efficiently gain the skills you need to grow your Sage Consultancy business. Let's get learning now!

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