

sage X3

Customer Learning Catalog

as of September 1, 2020



Learn from the experts, and become one yourself.



Build my skills on Sage X3: Customer Learning that helps you succeed

Whether you are a new Sage X3 user or an experienced user looking for training on what's new or advanced learning, Sage University is the right place for you. With training options that are affordable and convenient, there are so many ways to learn.

Instructor-Led Virtual

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

Sessions are curriculum and training plans designed specifically for your organization delivered onsite or online.

Job Role

Available with recommended courses that best fits what you do for your organization.

User Certifications

Allows you to stand out from the crowd and be recognized for your knowledge by obtaining a certification with Sage.

eLearning

Self-paced recorded videos available whenever you are. Ideal for learning new concepts or acquaint new hires with basics of Sage X3.



BUILDING SKILLS

OVERVIEW

SPECIAL TOPICS

LEARNING MEMBERSHIP

BADGES & CERTS

LEARNING PATHS

COURSES

- Getting Started
- Overview Courses
- Core Curriculum
- Advanced Curriculum
- Expert Curriculum
- Enterprise Intelligence
- Additional Courses
 - Financial
 - Purchasing
 - Sales
 - Stock
 - Manufacturing
 - Reporting

UNIVERSITY PROFILE

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

New products and updates



New hires



New roles





Next level of skills



Implementation



- Hands-on Instructor-Led Virtual/ In-Class 
- Self-Paced eLearning 
- Private Customized Training
- Role Based Learning Paths
- Badging and Certification

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Sage University

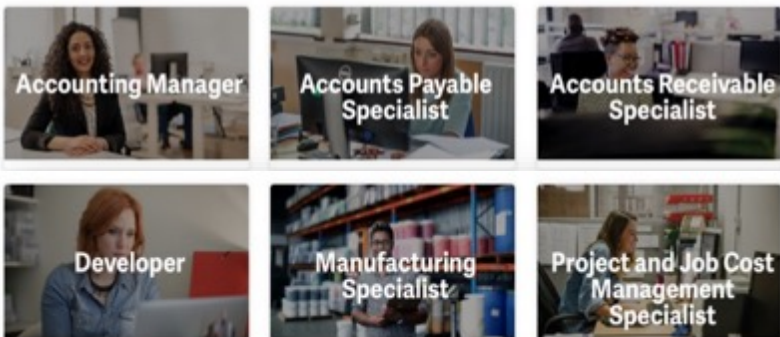
Training designed for **you**

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

50+
Courses

Job Role
Progression

Beginner to
Expert



Accounting Manager

 Get Started:

- Introduction to Enterprise Management
- Setting Started – Common Data

 Core Curriculum:

- Using the Solution – Financials
- Introduction and Overview: Financial and Distribution Users
- Accounting Manager Fundamentals
- Accounts Receivable Fundamentals
- Accounts Payable Fundamentals
- Processing Year-End

 Advanced Curriculum:

- Auto Journals
- Operation Budgets
- Fixed Assets
- Financial Data Extractor
- Sage Intelligence: Financials

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Access the Lunch and Learn list from SageU to see current exciting topics!

Popular training topics with knowledgeable instructors


In addition to Bootcamps, training by role, and STREAM, we offer live, instructor-led training on the topics important to you. Select the type of training to view upcoming training.



Lunch and Learn
Take an hour to learn a new skill
[View sessions >](#)



Expert Workshops
Designed to take your knowledge to the next level.
[View webinars >](#)


Role based training with a clear learning path to certification

Sage has designed learning paths to provide you with the knowledge and experience to help you succeed in your role. Each recommended learning path is designed to prepare you to successfully achieve your desired certification.


Getting Started:
These courses will introduce you to the


Core Learning:
These courses will help you be ready to


Advanced Learning:
These courses will take you to the


NEW! Badges:
Complete designated courses along your

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Sage X3 Learning Membership Levels

Sage X3 Learning Membership Levels

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BASIC



- Core eLearning
- Badges

PLUS



- Core Virtual ILT
- Core Certifications
- Learning Webinars

Premiere



- Advanced Virtual ILT
- Advanced eLearning
- All Certifications
- Training Manager Access
- Discounted Private and Classroom Training

Look for this lock icon to indicate the course membership level:



Sage X3 Learning Membership

	Basic	Plus	Premiere
Access to Sage University	🎯	🎯	🎯
Getting Started OnDemand Courses	🎯	🎯	🎯
Core OnDemand Courses	🎯	🎯	🎯
Core Virtual Instructor-Led (VILT) Courses		🎯	🎯
Advanced OnDemand Courses			🎯
Advanced Virtual Instructor-Led (VILT) Courses			🎯
Expert Virtual Instructor-Led (VILT) Courses			🎯
Additional Benefits			
What's New OnDemand Courses	🎯	🎯	🎯
Micro eLearning Topics (Based on top support calls)	🎯	🎯	🎯
Badges	🎯	🎯	🎯
Lunch and Learn (VILT) Courses (Courses change year-to-year)		🎯	🎯
Customer Certifications		🎯*	🎯**
Industry Specific (VILT) Courses			🎯
Single Training Manager Access			🎯
Private Training			10% Discount
Classroom Training			20% Discount

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Sage X3 Learning Membership Benefits

Giving everyone access to learning helps to ensure that your organization takes advantage of everything your software has to offer. That's why a Sage University Learning Membership is both sensible and affordable. And with a predictable annual cost, it's the best way to get the most value from your software.

For more information, visit [SageU!](#)

Shorten Time To Value using your Sage product with a well-informed and well-trained staff

Access to an extensive learning library for your entire company

Instant access to new courses, certifications, product release, and compliance training

Increased value and efficiency with your consulting relationships

Lower costs to train all your end users

Predictable yearly budgeting of cost-effective training

Invest in your employee's professional development

Improved confidence and effectiveness of your users

Certification and badging to validate and demonstrate employee expertise

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Sage X3 Badges and Certifications

Badges Recognize Your Newly Earned Skills And Award Your Personal Accomplishments



You can earn multiple badges at the course level and showcase your accomplishments on social media. Once you complete specific courses, you will earn a badge that you can see in Sage University. Then, you will receive a congratulatory email with downloadable badges. You can find courses with badges on Sage University now, and more are coming!

Earn The Ultimate Sage X3 Learning Achievement



Prove your skills to employers by passing a certification exam and earning the certification for your role. Certifications are available for multiple roles; for example, Accounts Payable, Accounts Receivable, and System Administrator. Earning your certification is version-specific, year-specific, does not expire, and includes certification logos and a media toolkit to share your achievement.

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Sage X3 Learning Paths

The Sage Customer Program makes it easy to get the knowledge you need to increase your success. Follow these simple learning paths to gain new Sage X3 skills, grow your revenues, and provide winning customer experiences. **Click the course name for details.**

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Accounting Manager



Get Started



Core Curriculum



Advanced Learning

Getting Started: Introduction to Sage X3

1.5 hours | eLearning | Basic, Plus, Premiere

Getting Started - Common Data

1 hour | eLearning | Basic, Plus, Premiere

Introduction and Overview: Financial and Distribution Users

10 hours | VILT | Plus, Premiere

Setting Up Financials

2.5 hours | eLearning | Basic, Plus, Premiere

Entering Transactions, Budgets & Reports

4 hours | eLearning | Basic, Plus, Premiere

Current and Month-End Processing & Closing

2 hours | eLearning | Basic, Plus, Premiere

Accounting Manager Fundamentals

10 hours | VILT | Plus, Premiere

Accounts Receivable Fundamentals

8 hours | VILT | Plus, Premiere

Accounts Payable Fundamentals

8 hours | VILT | Plus, Premiere

Processing Year-End

2 hours | VILT | Plus, Premiere

Advanced Financials

36 hours | VILT



Expert Curriculum



Additional Learning (Advanced)



Certification

Expert Financials

32.5 hours | VILT

Automatic Journals

4 hours | VILT | Premiere

Operating Budgets

5 hours | VILT | Premiere

Fixed Assets

5 hours | VILT | Premiere

Sage X3 Accounting Manager Application Specialist Assessment

Plus, Premiere

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Accounts Payable Specialist

Get Started	Core Curriculum	Advanced Learning
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<p><u>Getting Started: Introduction to Sage X3</u> 1.5 hours eLearning Basic, Plus, Premiere</p> <p><u>Getting Started - Common Data</u> 1 hour eLearning Basic, Plus, Premiere</p>	<p><u>Introduction and Overview: Financial and Distribution Users</u> 10 hours VILT Plus, Premiere</p> <p><u>Accounts Payable Setup</u> 2.5 hours eLearning Basic, Plus, Premiere</p> <p><u>Accounts Payable Specialist: Invoicing & Payments</u> 2.75 hours eLearning Basic, Plus, Premiere</p> <p><u>Accounts Payable Fundamentals</u> 8 hours VILT Plus, Premiere</p>	<p><u>Advanced Financials</u> 36 hours VILT</p>
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Expert Curriculum	Additional Learning (Advanced)	Certification
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<p><u>Expert Financials</u> 32.5 hours VILT</p>	<p>n/a</p>	<p><u>Sage X3 Accounts Payable Application Specialist Assessment</u> Plus, Premiere</p>
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Accounts Receivable Specialist



Get Started



Core Curriculum



Advanced Learning

Getting Started: Introduction to Sage X3

1.5 hours | eLearning | Basic, Plus, Premiere

Getting Started - Common Data

1 hour | eLearning | Basic, Plus, Premiere

Introduction and Overview: Financial and Distribution Users

10 hours | VILT | Plus, Premiere

Accounts Receivable Setup

2.5 hours | eLearning | Basic, Plus, Premiere

Accounts Receivable Specialist: Invoicing & Payments

1.75 hours | eLearning | Basic, Plus, Premiere

Accounts Receivable Fundamentals

8 hours | VILT | Plus, Premiere

Advanced Financials

36 hours | VILT



Expert Curriculum



Additional Learning (Advanced)



Certification

Expert Financials

32.5 hours | VILT

n/a

Sage X3 Accounts Receivable Specialist

Plus, Premiere

Sage X3 Learning Paths

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Customer Service

Get Started	Core Curriculum	Advanced Learning	Certification
<p><u>Getting Started: Introduction to Sage X3</u> 1.5 hours eLearning Basic, Plus, Premiere</p> <p><u>Getting Started - Common Data</u> 1 hour eLearning Basic, Plus, Premiere</p>	<p><u>Introduction and Overview: Financial and Distribution Users</u> 10 hours VILT Plus, Premiere</p> <p><u>Managing After-Sales Services</u> 5 hours VILT Plus, Premiere</p> <p><u>Managing Leads and Prospects</u> 5 hours VILT Plus, Premiere</p>	n/a	n/a

Developer

Get Started	Core Curriculum	Advanced Learning	Expert Learning
<p><u>Getting Started: Introduction to Sage X3</u> 1.5 hours eLearning Basic, Plus, Premiere</p> <p><u>Getting Started - Common Data</u> 1 hour eLearning Basic, Plus, Premiere</p>	<p><u>Introduction and Overview: Financial and Distribution Users</u> 10 hours VILT Plus, Premiere</p> <p><u>Common Tools Course</u> 15 hours VILT Plus, Premiere</p> <p><u>Development Basics</u> 26 hours VILT Plus, Premiere</p>	<p><u>Web Services and Integration</u> 15 hours VILT Plus, Premiere</p> <p><u>Advanced Common Tools</u> 10 hours VILT Plus, Premiere</p>	<p><u>Expert Developer</u> 10 hours VILT Plus, Premiere</p>

Sage X3 Learning Paths

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 - Manufacturing
 - Reporting

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Manufacturing Specialist



Get Started



Core Curriculum



Advanced Learning

Getting Started: Introduction to Sage X3

1.5 hours | eLearning | Basic, Plus, Premiere

Getting Started - Common Data

1 hour | eLearning | Basic, Plus, Premiere

Introduction and Overview: Manufacturing

5 hours | VILT | Plus, Premiere

Using the Solution - Manufacturing

4 hours | eLearning | Basic, Plus, Premiere

Manufacturing Specialist

15 hours | VILT | Plus, Premiere

Advanced Manufacturing

32.5 hours | VILT



Expert Curriculum



Additional Learning (Advanced)



Certification

Expert Manufacturing

32.30 hours | VILT

Manufacturing Configurator

5 hours | VILT | Premiere

Non-Conformance Management

2 hours | VILT | Plus, Premiere

Introduction to Sage X3 Warehousing

.5 hour | eLearning | Premiere

Using the Solution: Sage X3 Warehousing

2.15 hours | eLearning | Premiere

n/a

Sage X3 Learning Paths

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Project and Job Cost Management Specialist

Get Started	Core Curriculum	Advanced Learning	Certification
<p><u>Getting Started: Introduction to Sage X3</u> 1.5 hours eLearning Basic, Plus, Premiere</p>	<p><u>Introduction and Overview: Financial and Distribution Users</u> 10 hours VILT Plus, Premiere</p>	<p>n/a</p>	<p>n/a</p>
<p><u>Getting Started - Common Data</u> 1 hour eLearning Basic, Plus, Premiere</p>	<p><u>Using the Solution – Project Management</u> 1.5 hours eLearning Basic, Plus, Premiere</p>		
	<p><u>Project Management Fundamentals</u> 18 hours VILT Plus, Premiere</p>		

Sage X3 Learning Paths

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Purchasing Specialist



Get Started



Core Curriculum



Advanced Learning

Getting Started: Introduction to Sage X3

1.5 hours | eLearning | Basic, Plus, Premiere

Getting Started - Common Data

1 hour | eLearning | Basic, Plus, Premiere

Introduction and Overview: Financial and Distribution Users

10 hours | VILT | Plus, Premiere

Overview and Setting Up Purchasing

.3 hours | VILT | Plus, Premiere

Receiving, Invoicing, Utilities & Reports

2.25 hours | VILT | Plus, Premiere

Ordering, MRP Calculation & Enterprise Planning

1 hour | VILT | Plus, Premiere

Purchasing Fundamentals

10 hours | VILT | Plus, Premiere

Advanced Distribution

36 hours | VILT



Expert Curriculum



Additional Learning (Advanced)



Certification

Expert Distribution

32.5 hours | VILT

Purchasing Signature Management

2 hours | eLearning | Plus, Premiere

Advanced Purchasing & Three-Way Matching

1.5 hours | VILT | Plus, Premiere

n/a

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Reporting and Analytics: Sage Enterprise Intelligence

Get Started	Core Curriculum	Advanced Learning	Certification
<p><u>Getting Started: Introduction to Sage X3</u> 1.5 hours eLearning Basic, Plus, Premiere</p> <p><u>Getting Started - Common Data</u> 1 hour eLearning Basic, Plus, Premiere</p>	<p><u>Introduction and Overview: Financial and Distribution Users</u> 10 hours VILT Plus, Premiere</p> <p><u>Getting Started with the Basics</u> 5 hours VILT Plus, Premiere</p> <p><u>Using the SEI Add in for Excel</u> 5 hours VILT Plus, Premiere</p> <p><u>Report Designer</u> 4 hours VILT Plus, Premiere</p> <p><u>Formatting, Filtering and Sorting</u> 3.5 hours VILT Plus, Premiere</p>	<p><u>Administration and Security</u> 5 hours VILT Premiere</p>	n/a

Reporting and Analytics: Other

Get Started	Core Curriculum	Advanced Learning	Certification
<p><u>Getting Started: Introduction to Sage X3</u> 1.5 hours eLearning Basic, Plus, Premiere</p> <p><u>Getting Started - Common Data</u> 1.5 hours eLearning Basic, Plus, Premiere</p>	<p><u>Introduction and Overview: Financial and Distribution Users</u> 10 hours VILT Plus, Premiere</p> <p><u>Crystal Reports Basics</u> 10 hours VILT Plus, Premiere</p> <p><u>Financial Data Extractor</u> 5 hours VILT Plus, Premiere</p> <p><u>Sage Intelligence Financials</u> 8 hours VILT Plus, Premiere</p>	n/a	n/a

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Sales Specialist

Get Started	Core Curriculum	Advanced Learning
<p><u>Getting Started: Introduction to Sage X3</u> 1.5 hours eLearning Basic, Plus, Premiere</p> <p><u>Getting Started - Common Data</u> 1 hour eLearning Basic, Plus, Premiere</p>	<p><u>Introduction and Overview: Financial and Distribution Users</u> 10 hours VILT Plus, Premiere</p> <p><u>Setting Up Sales & Pricing</u> 2.5 hours VILT Basic, Plus, Premiere</p> <p><u>Creating Quotes & Orders, Allocating Stock & Delivery</u> 2 hours VILT Basic, Plus, Premiere</p> <p><u>Batch Sales Processing, Reports & Inquiries</u> 1 hour VILT Basic, Plus, Premiere</p> <p><u>Sales Fundamentals</u> 10 hours VILT Plus, Premiere</p>	<p><u>Advanced Distribution</u> 36 hours VILT</p>
Expert Curriculum	Additional Learning (Advanced)	Certification
<p><u>Expert Distribution</u> 32.5 hours VILT</p>	<p><u>Sales Signature Management</u> 1.5 hours VILT</p>	<p>n/a</p>

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Stock Specialist

Get Started Core Curriculum Advanced Learning

<p><u>Getting Started: Introduction to Sage X3</u> 1.5 hours eLearning Basic, Plus, Premiere</p> <p><u>Getting Started - Common Data</u> 1 hour eLearning Basic, Plus, Premiere</p>	<p><u>Introduction and Overview: Financial and Distribution Users</u> 2 days VILT Plus, Premiere</p> <p><u>Setting Up Stock</u> 2.5 hours VILT Basic, Plus, Premiere</p> <p><u>Entering Transactions, Stock Counts, and Reordering</u> 2.25 hours VILT Basic, Plus, Premiere</p> <p><u>Periodic Processing, Reports & Inquiries</u> .5 hour VILT Basic, Plus, Premiere</p> <p><u>Stock Fundamentals</u> 10 hours VILT Plus, Premiere</p>	<p><u>Advanced Distribution</u> 36 hours VILT</p>
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Expert Curriculum Additional Learning (Advanced) Certification

<p><u>Expert Distribution</u> 32.5 hours VILT</p>	<p><u>Setting Up Quality Control & Transactions</u> 1.5 hours VILT Basic, Plus, Premiere</p> <p><u>Understanding and Using Warehouses</u> .5 hour VILT Basic, Plus, Premiere</p>	<p>n/a</p>
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System Administrator

Get Started	Core Curriculum	Advanced Learning
<p><u>Getting Started: Introduction to Sage X3</u> 1.5 hours eLearning Basic, Plus, Premiere</p> <p><u>Getting Started - Common Data</u> 1 hour eLearning Basic, Plus, Premiere</p>	<p><u>Introduction and Overview: Financial and Distribution Users</u> 10 hours VILT Plus, Premiere</p> <p><u>Common Tools Course</u> 15 hours VILT Plus, Premiere</p> <p><u>Security and Administrator Essentials</u> 15 hours VILT Plus, Premiere</p>	<p><u>Advanced Common Tools</u> 32.5 hours VILT Premiere</p> <p><u>Advanced Technical</u> 2 days VILT Premiere</p>
Expert Curriculum	Additional Learning (Advanced)	Certification
<p>n/a</p>	<p><u>Understanding and Creating Workflows</u> 8 hours VILT Premiere</p> <p><u>Introduction to Requesters/Queries</u> 10 hours VILT Premiere</p>	<p>Sage X3 System Administrator Application Specialist Assessment Plus, Premiere</p>

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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.

Getting Started: Introduction to X3



This learning package will introduce you to 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 landing pages
- How to 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



In this course you will learn the common data and records that are foundations to the entire Sage X3 program. This eLearning will take you from setting up a new company, understanding how multi-legislation is configured and basic transaction process flow, to an overview of the financial setup and common records used throughout your solution.

The topics in this course include:

- How to create a company and site
- Understanding key financial concepts
- Understanding legislation concepts
- How to manage mono and multi-legislations
- Understanding the impact of legislations on the organizational structure
- Understanding parameter values
- Working with entry transactions
- How to define BPs, Customers, and Suppliers
- How to Create Products
- Understanding the Sale Process

Overview and Setting Up Purchasing



In this interactive eLearning course, you will gain an understanding of the purchase steps or flows available in the system, which financial transactions are created from the purchasing flows, what some of the basic activity codes are as well as groups within purchasing, how to set up sites and suppliers for purchasing, and how to create a supplier.

The topics in this course include:

- Overview of the Purchasing Process
- How to set up Company records & Sites for Purchasing
- Purchasing Activity Codes & General Parameters
- How to personalize Purchase Entry Transactions
- Supplier setup requirements

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Sage X3 Overview Courses

Welcome to the Sage X3 Introduction and Overview **Instructor-led Training** courses. These hands-on courses provide you with a valuable overview of Sage X3 and functional areas within the program.

Introduction and Overview: Financial and Distribution Users

Two 5-hour sessions Plus, Premiere

This hands-on course will introduce and explain the principles, process flows and supporting configuration in Sage X3. You will understand how key functions are setup and configured for Finance and Distribution in Sage X3.

After completing this course, you will be able to:

- Log onto the program and understand how to navigate, search for information, and design your own landing pages
- Understand basic setup requirements for companies and sites
- Understand the role parameters play in setup
- Understand the transaction setup and flow of information as it is entered in the system
- Understand the stock, sales, and purchasing process flows
- Print reports and view inquiries

Introduction and Overview: Manufacturing

One 5-hour session Plus, Premiere

This hands-on course will introduce and explain the principles, process flows and supporting configuration in Sage X3. You will understand how key functions are setup and configured for Manufacturing in Sage X3.

After completing this course, you will be able to:

- Understanding manufacturing concepts and processes
- Use the manufacturing planning tools
- Set up manufacturing requirements
- Process material requirements planning
- Create work orders and perform allocations and scheduling
- Track the production process
- View and close work orders
- View actual costs compared to planned costs
- Determine the production cost of completed work orders

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Sage X3: Core Curriculum

Welcome to the Common Tools Course



Three 5-hour sessions



Plus, Premiere

Objectives

In this course, you will learn the concepts, tools, and functions common to Sage X3 modules.

What roles is this course for?

- System Administrator and Developer roles

Prerequisites

Prior to attending the course, attendees should review the Sage X3 – Getting Started: Introduction to Sage X3 and Sage X3 – Getting Started: Using the Solution – Common Data on Demand eLearning courses

Course Value

After completing the course, you will be able to View and edit general parameters

- Understand and work with activity codes
- Locate and edit local menus
- Set up entry transaction screens to simplify data entry
- Understand and reset sequence numbers
- Enter formulas to enhance a customer's business needs
- Integrate with and export data to Microsoft Excel, Word, and PowerPoint
- Attach documents and graphics to business documents such as sales orders
- Work with and create workflow notifications and access, view, and design process views
- Define user-defined inquiries and personalize inquiry screens and objects

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Sage X3: Core Curriculum

Welcome to the Accounting Manager Fundamentals Course

 Two 5-hour sessions  Plus, Premiere

Objectives

This course will provide a comprehensive overview of the key functions and features in Sage X3 related to the financial accounting role. You will learn how to establish charts of accounts and work with dimensions, understand how the organizational structure is defined, and use the key financial accounting functions for journal entries and inquiries. This course will also explain how transactions flow through Sage X3 and how to view related accounting documents, as well as how to perform period closings. In this session you will learn all of the critical features and functions necessary to perform financial accounting tasks in Sage X3.

What roles is this course for?

- Accounting Managers

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define company and site information
- Define fiscal years and periods
- Define the account plan, chart of accounts, dimensions and appropriate values
- Understand the setup options associated with analytical accounting in Sage X3
- Understand how ledgers are updated, including the general ledger
- Enter transactions directly in Financials including journal entries, reversing entries, simulations, and allocation transactions
- Understand the final validation process for journal entries
- Understand the purpose of financial data extraction and how to use the tools available to create financial reports
- Set up information for intercompany transactions and enter an intercompany journal entry and customer/supplier invoice
- Understand the functions associated with closing a period and year in Financials

Customer Certification

- This course is part of the Accounting Manager Specialist certification path

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Sage X3: Core Curriculum

Welcome to the Accounts Payable Fundamentals Course

Two 4-hour sessions
 Plus, Premiere

Objectives

In this course, you will gain a comprehensive overview of the key functions and features in Sage X3 related to the Accounts Payable role. You will learn how to define related A/P parameters, work with business partner and supplier records, and enter purchase and miscellaneous invoices. This session will also provide instruction on managing supplier payments and processing check runs, working through bank reconciliations, and processing routine monthly tasks like employee expenses.

What roles is this course for?

- Accounting Managers
- Accounts Payable Specialists

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define specific parameters such as payment terms and payment attributes
- Enter and manage BPs and suppliers
- Enter supplier invoices associated with a purchase order and recurring invoices
- Understand the setup requirements for intercompany transactions and enter intercompany invoices
- Manage and enter purchase invoices and credit memos received from a supplier
- Manage and enter supplier payments including viewing the Cash Requirements
- Generate automatic payment proposals
- Print and post checks
- Understand the 1099 setup options and view 1099 reports
- Track employee expenses and process expense reports
- Create a manual reconciliation, reconcile bank entries, and reverse a reconciliation

Customer Certification

- This course is part of the Accounts Payable Specialist certification path

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Sage X3: Core Curriculum

Welcome to the Accounts Receivable Fundamentals Course

 Two 4-hour sessions   Plus, Premiere

Objectives

In this course, you will gain a comprehensive overview of the key functions and features in Sage X3 related to the Accounts Receivable role. You will learn how to define related A/R parameters, work with business partner and customer records, and enter sales and miscellaneous invoices. This session will also provide instruction on managing customer payments and entering deposits, working through bank reconciliations, and processing routine monthly tasks like customer statements and reminders.

What roles is this course for?

- Accounting Managers
- Accounts Receivable Specialists

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define specific parameters such as payment terms and payment attributes
- Enter and manage BPs and customers
- Enter customer invoices and recurring invoices
- Understand the setup requirements for intercompany transactions and enter intercompany invoices
- Enter sales invoices and generate direct order invoices deliver invoices
- Enter customer and sales credit memos
- Enter customer payments and create automatic remittances
- Create customer statements and reminders and create reminder campaigns
- Create a manual reconciliation, reconcile bank entries, and reverse a reconciliation

Customer Certification

- This course is part of the Accounts Receivable Specialist certification path

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Sage X3: Core Curriculum

Welcome to the Year-End Processing Course

 One 2-hour session   Plus, Premiere

Objectives

In this course, you will learn the steps necessary to achieve a smooth year-end close. You will learn how to use available resources and established procedures to help you achieve a successful year-end close for your distribution and financial modules.

What role is this course for?

- Accounting Managers

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Locate resource to assist you with year-end activities
- Open and close accounting periods to allow or prevent creation and posting of journal entries to those periods
- Perform a year-end simulation to run a trial balance for the new year
- Perform year-end closing to close the company's fiscal year and create the corresponding accounting entries
- Print all year-end reports

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Sage X3: Core Curriculum

Welcome to the Managing After-Sales Services Course

 One 5-hour session   Plus, Premiere

Objectives

In this course, you will gain a comprehensive overview of the key functions and features to manage the after-sales services in the Customer Service module. You will learn about the customer support flow as it relates to creating service contracts, warranty vouchers and requests, call queues and skill groups. This course will also explain how to manage service requests from a customer including assigning service requests to specific individuals based on skills, how to record service responses, and define solutions.

What role is this course for?

- Customer Service

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define service contract templates
- Define and view after-sales product information
- View and track service contracts, warranty vouchers, and requests
- Manage service requests including tracking the service requests, entering resolutions, and assigning to individuals

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Sage X3: Core Curriculum

Welcome to the Managing Leads and Prospects Course

 One 5-hour session  Plus, Premiere

Objectives

In this course, you will gain a comprehensive overview of the key functions and features to manage Leads and Prospects in the Customer Service module. You will learn about the common data required for managing leads and prospects, assign leads and prospects to various sales staff according to their sector, initiate various after-sales flows related to sales, and create projects, tasks, and calls associated with specific leads and prospects.

What role is this course for?

- Customer Service

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Create common data required for managing leads and prospects
- Create and manage leads and prospects, including how to convert a lead to a prospect
- Assign leads to sales reps based on criteria you define
- Manage sales actions including defined projects and creating tasks, calls, appointments, and resources
- View and generate an overall calendar of the various actions associated with an employee
- Create a quote for a project

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Sage X3: Core Curriculum

Welcome to the Manufacturing Specialist Course

 Three 5-hour sessions   Plus, Premiere

Objectives

In this course, you will learn about the essential manufacturing and production functions. Get hands-on experience setting up the manufacturing requirements and generating work orders based on MRP/MPS entries. You will also practice allocating work orders and viewing projected stock information, enter a work order, view a list of work orders, create a production bill of materials and perform a cost calculation rollup. These are just a few of the activities you will explore using realistic demonstration data in a hands-on environment.

What role is this course for?

- Manufacturing specialists responsible for setting up and maintaining manufacturing and production processes for your organization

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Manufacturing course

Course Value

After completing the course, you will be able to:

- Understand manufacturing concepts and processes
- Understand and use the manufacturing planning tools
- Define categories, products, product sites, costing dimensions, and work centers for manufacturing
- Use the material requirements planning (MRP) and master production schedule (MPS) planning tools
- Work with enterprise planning and workbench tools, group orders, and view MPS and MRP inquiries and reports
- Create work orders and perform allocations and scheduling
- Understand capacity planning and how load affects capacity, tools to recalculate the load, and view the load for a site and verify available capacity
- Track the production process
- View the work order status and close a work order
- View actual costs compared to planned costs
- Determine the production cost for a completed work order
- Understand tracking plans and how they are used to track time and materials

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Sage X3: Core Curriculum

Welcome to the Project Management Fundamentals Course

 Three 6-hour sessions   Plus, Premiere

Objectives

In this course, you will learn how to set up the Project Management (PJM) feature. You will also learn how to use PJM to manage the full cycle of a project from the proposal creation to closure.

What role is this course for?

- Manufacturing specialists responsible for setting up and maintaining manufacturing and production processes for your organization

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Using the Solution – Project Management (PJM) learning package included as prework for this course
- Attend the Sage X3 Stock Fundamentals course, or have working experience and knowledge of Sage X3 stock management and the distribution process flow, transactions, setup, and configuration

Course Value

After completing the course, you will be able to:

- Understand all functions involved in the project management module
- See how the project is used to initiate the existing business flow in Sage X3 regarding the sales, stock replenishment, and the analytical accounting
- Use the PJM features to manage the full cycle of a project from the proposal creation to the closure of the project
- Explain all functions involved in the Project Management module

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Sage X3: Core Curriculum

Welcome to the Purchasing Fundamentals Course

 Two 5-hour sessions   Plus, Premiere

Objectives

In this course, you will gain a comprehensive overview of the key functions and features in Sage X3 related to the Purchasing role. You will learn how to work with common data settings for suppliers and products, define purchase pricing, and enter purchasing transactions. This course will also provide instruction on how to use inquiry screens for purchase optimization, and how to work with purchasing workflows for signature management. In this session you will learn all of the critical features and functions necessary to perform Purchasing tasks in Sage X3.

What role is this course for?

- Purchasing Specialists

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define setting for such items as suppliers and products used in purchasing
- Set up and define purchase pricing information including structure, reason, and parameters
- Enter price information and activate price lists
- Enter a quote
- Enter various types of orders included purchase orders, contract orders, direct orders, and inter-site/inter-company orders
- Understand how the purchasing signature management process affects how orders are entered and processed
- Define standard workflow rules for use with purchasing signature management

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Sage X3: Core Curriculum

Welcome to the Sales Fundamentals Course

 Two 5-hour sessions   Plus, Premiere

Objectives

In this course, you will gain a comprehensive overview of the key functions and features in Sage X3 related to the Sales role. You will learn how to work with common data settings for customers and products, define price lists, and enter sales transactions. This course will also provide instruction on how to inquire on sales transactions, and how to work with sales workflows for signature management.

What role is this course for?

- Sales Specialists

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define setting for such item's sales sites, customers, and products used in the sales process
- Set up and define sales pricing information including structure, reason, and parameters
- Enter price information and activate price lists
- Enter a quote
- Enter various types of orders included normal orders, contract orders, direct orders, and inter-site/inter-company orders
- Understand how the sales signature management process affects how orders are entered and processed
- Define standard workflow rules for use with sales signature management

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Sage X3: Core Curriculum

Welcome to the Stock Fundamentals Course



Two 5-hour sessions



Plus, Premiere

Objectives

In this course, you will gain a comprehensive overview of the key functions and features in Sage X3 related to Stock Management. You will learn how to establish inventory records and define products, work with valuation and costing parameters, and perform routine stock transactions for movements and counts. This course will also provide instruction on how the Stock Management role affects Purchasing and Sales roles by managing receiving and shipment functions.

What role is this course for?

- Stock Specialists

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define settings specific to inventory including defining stock statuses, units of measure, and packages
- Understand and set up product lines
- Define information necessary for creating products including valuation methods, stock management rules, and product categories
- Create new products and modify existing product information
- Enter miscellaneous issues and receipts and inter-site transfers
- Assemble and disassemble a production bill of material
- Receive products from a purchase order
- Allocate and ship products to a customer

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Sage X3: Core Curriculum

Welcome to the Security and Administrator Course

 Three 5-hour sessions   Plus, Premiere

Objectives

In this course, you will learn about the essential system administrator functions. Get hands-on experience creating and modifying security users, profiles, modifying pages using the authoring tools, and how to optimize database performance.

What roles is this course for?

- Administrators responsible for setting up and maintaining security in Sage X3
- Administrators responsible for managing the database and performance of a company's system

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Understand security in Sage X3 and create users
- Understand folders and set up endpoints
- Understand the patch integration process and tools
- Understand the data import/export tools and capabilities
- Configure and use the Batch Server to process tasks and requests
- Create and use Process Flows
- Create and use Workflow rules and notifications
- Understand the Microsoft Office integration and collaboration tools
- Understand the Authoring function and how to use them

Customer Certification

- This course is part of the System Administrator Specialist certification path

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Sage X3: Core Curriculum

Welcome to the Development Basics Course

 Five 5-hour sessions  Plus, Premiere

Objectives

In this course, you will learn how to use the development tools in Sage X3 including how to create your own windows, screens, objects, and functions, modify existing processes, and use the Eclipse editor to write and debug code.

What role is this course for?

- Developers creating customizations for their Sage X3 solution

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course
- Attend the Common Tools course

Course Value

After completing the course, you will be able to:

- Configure the Domain Management application
- Understand the Sage X3 language including integers, strings, arrays, trace files, and boxes,
- Design tables, screens, and windows
- Use events and actions
- Debug and optimize Sage X3 code
- Use import templates
- Develop advanced functions

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Sage X3: Advanced Curriculum

Welcome to the Advanced Financials Course

 36 hours, English only   Premiere

Objectives

This interactive workshop interactive advanced workshop is your next step to effectively work on projects with multi-currency needs, and successfully navigate through advanced adjustments and month end close procedures. This course is offered as part of the Mastering Sage X3 Bootcamp program. This workshop is very interactive with assigned tasks and discussion points with the instructor and other attendees, to share approaches and outcomes.

After completing this course, you will:

- Understand what a core model is and when is it required
- Know how to explain and setup a multi-currency configuration
- Have learned the mechanism of conversion variance calculations and how to set up accounts managed with currencies
- Understand how to proceed safely with automatic journal setup adjustments
- Be able to diagnose common errors, and perform adjustments without the need for development work
- Know how to effectively close end of month, the proper steps, and how to resolve common errors

Prerequisites

To ensure you receive the most from this training, it is recommended you complete the following prior to attending to have a basic understanding of the Sage X3 solution:

- X3 – Sage X3 - Introduction to Sage X3
- X3 – Sage X3 - Getting Started: Common Data
- X3 – Sage X3 - MX3 Bootcamp: Financials Course or equivalent certification (Partner Consultants); or Accounting Manager Fundamentals, Accounts Payable Fundamentals, Accounts Receivable Fundamentals or equivalent eLearning courses (Customers)

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UNIVERSITY PROFILE

Sage X3: Advanced Curriculum

Welcome to the Advanced Distribution Course

 36 hours, English only   Premiere

Objectives

This interactive workshop will provide hands-on experience for implementing and configuring the Sage X3 system.

Using actual customer implementation scenarios, you will review specific Distribution topics you'll configure in most implementations.

After completing this course, you will:

- Understand and configure different valuation methods, work with consigned stock, and subcontracting flows
- Know how to explain and setup fixed and flexible sales kits
- Be able to define sales price lists and their interaction with order entry
- Have the knowledge to setup elements for complex freight carrier calculations
- Understand how commission calculations can be configured to sales reps with different rates
- Have an understanding how MRP and Work Orders effect costing and demands on stock
- Be introduced to manufacturing workflow, including data setup for creating products, BOMs, and routings

Prerequisites

To ensure you receive the most from this training, it is recommended you complete the following prior to attending to have a basic understanding of the Sage X3 solution:

- X3 – Sage X3 - Introduction to Sage X3
- X3 – Sage X3 - Getting Started: Common Data
- X3 – Sage X3 - MX3 Bootcamp: Financials Course or equivalent certification (Partner Consultants); or Accounting Manager Fundamentals, Accounts Payable Fundamentals, Accounts Receivable Fundamentals, and equivalent eLearning courses (Customers)
- X3 – Sage X3 - MX3 Bootcamp: Distribution Course or equivalent certification (Partner Consultants); or Purchasing Fundamentals, Stock Fundamentals, and Sales Fundamentals and equivalent eLearning courses (Customers)

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UNIVERSITY PROFILE

Sage X3: Advanced Curriculum

Welcome to the Advanced Manufacturing Course

 32.5 hours, English only   Premiere

Objectives

This interactive workshop will provide hands-on experience for implementing and configuring the Sage X3 system.

You will master different Manufacturing functions, plan the production and understand the real cost of your production. You will learn handy tips and tricks through a variety of hands-on exercises.

After completing this course, you will be able to:

- Understand the impact of using version on both data design and business flows
- Implement version FoM and Routing
- Implement MRP/MRS process within a manufacturing context
- Manage the scheduling process in infinite capacity
- Manage production tracking
- Value the produced goods

Prerequisites

To ensure you receive the most from this training, it is recommended you complete the following prior to attending to have a basic understanding of the Sage X3 solution:

- X3 – Sage X3 - Introduction to Sage X3
- X3 – Sage X3 - Getting Started: Common Tools
- X3 – Sage X3 - MX3 Bootcamp: Distribution Course or equivalent certification (Partner Consultants); Purchasing Fundamentals, Stock Fundamentals, and Sales Fundamentals and equivalent eLearning courses (Customers)
- X3 – Sage X3 - Manufacturing Consultant Course or equivalent certification (Partner Consultants); Manufacturing Fundamentals course (Customers)

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UNIVERSITY PROFILE

Sage X3: Advanced Curriculum

Welcome to the Advanced Common Tools Course

 32.5 hours, English only   Premiere

Objectives

This interactive course is focused on building upon the core concepts, tools and functions which are common to all Sage X3 modules. This is a fundamental class expanding your foundation of knowledge prior to embarking upon specialist learning topics.

During this class, you will strengthen your common tools experience and enhance your knowledge. You will be able to use and apply formulae in real life scenarios and manage the needs of your customers using queries and statistics.

As you gain confidence in the tools and advanced settings available, the landing pages you create will become more meaningful for your customers.

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Sage X3: Advanced Curriculum

Welcome to the Advanced Technical Course

 36 hours, English only   Premiere

Objectives

In this interactive workshop you will learn to use Sage X3 Development framework.

You will master the parameterization tools for the settings on the UI, screen windows and objects. You will learn the difference between classic, Syracuse and hybrid pages.

You will be able to use different generic scripts to get time in your development, you will learn different tips and tricks, and discover some practical tips regarding import export engine.

After completing this course, you will:

- Understand the elements to modify or design a classic page by customizing screens, adding tabs and custom fields
- Be able to improve customer usability through improvements to windows and menu changes
- Know how to create or change a page and create a web app
- Understand how to manage field initialization and controls
- Improve your customers performance with data storage functions, default repositories and transcribe management
- Learn best practice for efficient importing and exporting of data, including files not structured for Sage X3

Prerequisites

To ensure you receive the most from this training, it is recommended you complete the following prior to attending to have a basic understanding of the Sage X3 solution:

- X3 – Sage X3 - Introduction to Sage X3
- X3 – Sage X3 - Getting Started: Common Data
- Attendance in the Core Financials and Distribution product learning (Partners); or Accounting Manager, Accounts Payable Specialist, and Accounts Receivable Specialist product learning (Customers)
- Attendance in the Common Tools, System Administrator/Security and Administrator Essentials courses
- Attendance in the Installation courses or holding the Technical and/or Development Certification (Partners)

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UNIVERSITY PROFILE

Sage X3: Advanced Curriculum

Welcome to the Web Services Course

 Three 5-hour sessions  Premiere

Objectives

In this course, you will learn the from beginning to end how to set up and integrate web services between

Sage X3 and your application. You will learn what web services are and the best practices and limitations of implementing web services.

What role is this course for?

- Developers wanting to expand their Sage X3 developer capabilities by utilizing web services to create integrations between Sage X3 and another application

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course
- Attend the Development Basics course

Course Value

After completing the course, you will be able to:

- Understand what web services are and how to link to them in a Sage X3 solution
- Understand web services architecture and how the web server publishes web services and processes a request
- Set up web services in the SAFE X3 management console
- Set up connection pools for managing waiting queues for web service requests
- Publish subprograms and objects such as sales orders and products in order to make them accessible to external applications through the Internet
- Understand how to define a project team for developing the integration including estimating workloads, third party application development, unit testing, and final development
- Understand tips and best practices for testing and troubleshooting the integration

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Sage X3: Advanced Curriculum

Welcome to the Understanding and Creating Workflows Course



Two 4-hour sessions



Premiere

Objectives

In this course, you will learn how to have Sage X3 alert you every time a customer credit level is changed, or when a special supplier invoice is entered, or for something specific to your information needs. Sage X3 has comprehensive workflow functionality that includes the ability to create simple email notifications to alert you when you need it. Attend this course to find out how you can use the workflow feature to improve efficiency and manage data within Sage X3.

What role is this course for?

- System administrators

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Common Tools course

Course Value

After completing the course, you will be able to:

- How to define parameters that impact workflow functionality
- How to create simple workflows using Notifications
- How to create advanced workflows using Workflow Rules containing Signature events, actions, and advanced receipt selections
- How to use the Workflow monitor to view events triggered by a workflow

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Sage X3: Advanced Curriculum

Welcome to the Introduction to Requesters/Queries Course



Two 5-hour sessions



Premiere

Objectives

In this course, we will look at practical examples of the 3 methods of creating Requesters/Queries. We will also look at creating views, which can be used to increase the speed at which data can be returned from a requester/query.

Additionally we will cover the presentation of data from a requester/query either on the Landing Page and exporting to a Spreadsheet, or Dashboard Views.

What role is this course for?

- System Administrators

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Common Tools course

Course Value

After completing the course, you will be able to:

- How to create and modify Classic Requesters/Queries including reviewing and modifying joins between tables of data
- How to create simple requesters/queries using Graphical Requester/Query including creating complex links and adding new Keys to existing tables
- How to create simple requesters/queries using SQL Requester/Query including using an alias on a table, defining conditions, and joining tables without Keys
- How to create a View with a Key as well as how to create a view to display summary information.
- How to present information on the Home page using menu items, exporting data to a spreadsheet, and using a Dashboard View.

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UNIVERSITY PROFILE

Sage X3: Expert Curriculum

Welcome to the Expert Financials Course

 32.5 hours, English only  Premiere

Objectives

This interactive workshop will provide hands-on experience for implementing and configuring the Sage X3 system.

Using actual customer implementation scenarios, you will review specific Finance topics that you will configure on multi-site project implementations. This workshop is very interactive with assigned tasks and discussion points with the instructor and other attendees, to share approaches and outcomes.

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Sage X3: Expert Curriculum

Welcome to the Expert Distribution Course

 32.5 hours, English only   Premiere

Objectives

This interactive workshop will provide hands-on experience for implementing and configuring the Sage X3 system.

Using actual customer implementation scenarios, you will review specific Distribution topics you'll configure in most implementations. In this course you will learn how to manage and calculate the full cost of a product within various situations, learn tips and tricks regarding price management and discover how implement after-sales support.

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Sage X3: Expert Curriculum

Welcome to the Expert Manufacturing Course

 32.5 hours, English only   Premiere

Objectives

This interactive workshop will provide hands-on experience for implementing and configuring the Sage X3 system.

Using actual customer implementation scenarios, you will review specific Manufacturing topics that you will configure in most implementations. In this Expert course you will increase your understanding of PJM positioning and structure. Delegates will go through the Project Job Management functions and gain first-hand experience of PJM implementation based on a real user case.

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Sage X3: Expert Curriculum

Welcome to the Expert Developer Course

 32.5 hours, English only   Premiere

Objectives

In this interactive workshop you will learn to use the Sage X3 Development framework. Delegates will develop scripts to handle all rules and events within the different Sage X3 technologies and gain the necessary experience to implement hybrid pages.

This interactive workshop will provide hands-on experience for implementing Web services and learning 4GL best practices. You will find out more about how to invoke SOAP X3 Web Services from a PHP portal, the Architecture of a Web Service and discover the Web Service (REST).

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Sage Enterprise Intelligence Courses

Welcome to our library of Sage Enterprise Intelligence (SEI) for Sage X3 training courses. Attend these courses to build your skills with webinars and training on specific Sage Enterprise Intelligence for Sage X3 features and functionality:

SEI - Getting Started with the Basics

5-hours Plus, Premiere

Attend this webinar to learn about the Sage Enterprise Intelligence report and analysis tool. This course provides a high-level overview and will help you quickly get started using the basic functions and features.

SEI - Formatting, Filtering, and Sorting

3 hours 30 mins Plus, Premiere

Attend this webinar to learn how to customize data views in Sage Enterprise Intelligence (SEI). You will learn how to format columns in a view and advanced techniques for filtering, customizing fields, and creating rules based on certain conditions for more efficient and tailored views of your data.

SEI - Using the SEI Add in for Excel

5-hours Plus, Premiere

Attend this webinar to learn about the Sage Enterprise Intelligence (SEI) Addin for Excel. This addin allows you to access real-time information within Excel from your ERP database.

SEI - Administration and Security

5-hours Premiere

Attend this webinar to ensure business processes run smoothly and securely on your Sage Enterprise Intelligence (SEI) system. This includes determining what can be viewed, deleted, or modified by all users on the system. You will also learn how to set up the business processes used by other users of the system and set up distribution reports.

SEI - Report Designer

4-hours Plus, Premiere

Attend this webinar to learn how to create and customize dynamic operational and financial reports using the Report Designer in Sage Enterprise Intelligence. This includes accessing existing reports and creating new reports, importin SEI worksheets into reports, and customizing reports to meet a company's specific needs.

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Additional Financial Courses

Welcome to our library of Sage X3 learning opportunities. Attend these courses to build your skills with webinars and training on specific Sage X3 features and functionality:

Setting Up Financials

2.5-hours Basic, Plus, Premiere

This interactive eLearning course provides you with an understanding of the accounting setup including defining the account plan, creating account classes and accounts, understanding analytical accounting and defining dimensions, defining ledgers and the account core model, defining fiscal years and periods, and how to pull all the information together when creating the company and site..

Entering Transactions, Budgets & Reports

4-hours Basic, Plus, Premiere

This interactive eLearning course provides you with an understanding of how to post to the general ledger, set up and create journal entries, work with analytical allocations, learn about analytical budgets, enter budgets, and lastly you will learn the various methods of viewing your data; including Sage Enterprise Intelligence (SEI), Sage Intelligence (SI), and Financial Data Extraction (FDE).

Current and Month-End Processing & Closing

2-hours Basic, Plus, Premiere

In this interactive learning adventure, you will gain an understanding of these processes including how to change journal entries from temporary to final using Final Validation, enter simulations, enter and process recurring journals, reverse accruals, how to modify amounts/quantities distributed to a dimension, and lastly how to actually close a period and fiscal year.

Accounts Receivable Setup

2.5-hours Basic, Plus, Premiere

This interactive eLearning course provides you with information about defining business partners and creating the customer and supplier categories; defining setup information such as payment methods, payment terms, early discounts and late charges, and other settings that need to be made before payments can be received.

Accounts Receivable Specialist: Invoicing & Payments

1.75-hours Basic, Plus, Premiere

This interactive eLearning course provides information on how to enter customer invoices; how to generate customer statements and create reminders; how to view and manage open items and finally, how to enter customer payments.

Accounts Payable Setup

2.5-hours Basic, Plus, Premiere

This interactive eLearning course provides you with information about defining business partners and creating the customer and supplier categories; defining setup information such as payment methods, payment terms, early discounts and late charges, and other settings that need to be made before payments can be made.

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Additional Financial Courses

Welcome to our library of Sage X3 learning opportunities. Attend these courses to build your skills with webinars and training on specific Sage X3 features and functionality:

Accounts Payable Specialist: Invoicing & Payments

2.75-hours Basic, Plus, Premiere

This interactive eLearning course provides you with information on how to enter supplier invoices and manage open items; how the Cash Requirements Report provides information needed to pay open invoices; how to generate an automatic payment proposal and manually enter payments; and how to use the various functions for bank reconciliation.

Automatic Journals

4-hours Premiere

Attend this webinar to learn the structure of and how to configure and use Auto Journals. You will learn best practices for customizing to your needs, including using accounting codes. Also covered are the most used auto journals you may want to consider implementing in Sage X3.

Operating Budgets

5-hours Premiere

Attend this webinar about operating budgets in Sage X3 including how to create a budget structure, activate and approve the workflow, manage by product, envelope, year and lines, and finally view key inquiries and reports related to operating budgets.

Fixed Assets

5-hours Premiere

Attend this webinar to learn about Sage X3 Fixed Assets. You will be introduced to Fixed Assets including information on the setup requirements, functions and features, and how to add and manage asset records and calculate depreciation.

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Additional Purchasing Courses

Welcome to our library of Sage X3 learning opportunities. Attend these courses to build your skills with webinars and training on specific Sage X3 features and functionality:

Receiving, Invoicing, Utilities & Reports

2.25 hours Plus, Premiere

Attend this webinar to learn how to receive stock on a purchase order, receive serial and lot stock items, record supplier invoices for stock received, create purchase invoices for stock received, how to process returns to a supplier, and the purpose of key utilities, reports and inquiries.

Advanced Purchasing & Three-Way Matching

1.5 hours Premiere

Attend this webinar to gain an understanding of three-way matching, learn how to define the amount a receipt/invoice can deviate from the original purchase order, understand the various transactions entries used for matching, and assign default tolerance codes to suppliers, products or product/supplier.

Ordering, MRP Calculation & Enterprise Planning

1 hour Plus, Premiere

Attend this webinar to learn about what a purchase request is and how to enter one in the system, the various sources from which purchase orders can be generated, and how to create a purchase order and a contract order. You will also learn about the various tools available to help the planner/material buyer with purchasing decisions.

Purchasing Signature Management

2 hours Premiere

Attend this webinar to gain an understanding of the Purchasing Signature Management workflow, how to define assignments rules and user assignments, define delegated users and manage the signatures and workflow rules.

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Additional Sales Courses

Welcome to our library of Sage X3 learning opportunities. Attend these courses to build your skills with webinars and training on specific Sage X3 features and functionality:

Setting Up Sales & Pricing

 2.5 hours   Plus, Premiere

Attend this webinar to learn and gain an understanding of the overall sales process in Sage X3. You will also learn key setup information that impacts sales when setting up companies and sites, products, business partners, and sales taxes. You will also learn about the different parameters used to activate or de-activate functionality in sales and what impacts prices calculated for stock sold and how to set up pricing.

Sales Signature Management

 1.5 hours   Premiere

Attend this webinar to gain an understanding of the Sales Signature Management workflow, how to define assignments rules and user assignments, define delegated users and manage the signatures and workflow rules.

Creating Quotes & Orders, Allocating Stock & Delivery

 2 hours   Plus, Premiere

Attend this webinar to learn about the parameters to use when creating quotes and sales orders, as well as the Sales Order process and options available when entering quotes and sales orders. You will also learn how to manually and automatically allocate stock for a sales order and how to use the Delivery functions to process that order through to shipment.

Batch Sales Processing, Reports & Inquiries

 1 hour   Plus, Premiere

Attend this webinar to learn how to process specific Sales transactions through batch processing. For example, allocating stock from multiple orders at one time. You will also learn how to use the various reports and inquiries options in the Sales module, as well as the various utilities, such as the customer balances resynchronization function.

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Additional Stock Courses

Welcome to our library of Sage X3 learning opportunities. Attend these courses to build your skills with webinars and training on specific Sage X3 features and functionality:

Setting Up Stock

2.5 hours Basic, Plus, Premiere

Attend this webinar to gain an understanding of the overall stock process and locations and how to define stock sites, how to define location types and assign products, and how to define product attributes and products. You will also learn how to define statistical groups and product tax levels, units of measure and packages, stock statuses, and finally product lines.

Setting Up Quality Control & Transactions

1.5 hours Basic, Plus, Premiere

Attend this webinar to learn how to manage the settings for quality control management as well as how to work with receipts to see the impact on how an item is received, request a quality control inspection, and how to track the QC process.

Entering Transactions, Stock Counts, and Reordering

2.25 hours Basic, Plus, Premiere

Attend this webinar to learn how to enter transactions in inventory including miscellaneous receipts and issues, inter-site transfers, stock changes, and assembly and disassembly of products. You will also learn how to setup and perform a stock count in Sage X3. Lastly, you will understand the overall statistical reordering process.

Understanding and Using Warehouses

.5 hour Basic, Plus, Premiere

Attend this webinar to learn how warehouses are used in Sage X3, how to create and activate a warehouse in a site, assign locations to a warehouse, create a product-warehouse combination, and assign a default warehouse to use in transactions.

Periodic Processing, Reports & Inquiries

.5 hour Basic, Plus, Premiere

Attend this webinar to learn how to update the value of transactions carried out after an adjustment or a backdated transaction, modify the moving average price value for lines in the FIFO stack and for lots, print a stock valuation report for a given company according to different calculation criteria, adjust the backorder shortages as well as the suspended movement transactions with available stock.

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Additional Manufacturing Courses

Welcome to our library of Sage X3 learning opportunities. Attend these courses to build your skills with webinars and training on specific Sage X3 features and functionality:

Using the Solution – Distribution

5-hours Basic, Plus, Premiere

In this course you will learn common set up and transactions of the stock management, purchasing, and sales processes in Sage X3. This will include how to set up customers, suppliers, and products, an overview of processes performed in each area, and how they work together in moving stock throughout your distribution solution.

Introduction to Sage X3

Warehousing

30 mins Premiere

This eLearning course provides you with a high-level overview of Sage X3 Warehousing. You will learn about the benefits, architecture, different management workflows, modules, and the KPIs and Dashboards available.

Non-Conformance Management

30 mins Premiere

This eLearning course teaches you about setup requirements focusing on the Activity Codes, User and General Parameters, Misc. Tables, Actions and User Rights. You will also learn about the process starting with an Overview, creating an NC from a document, the process from New to Close, linking documents from an existing NC, Report features, and Tracking Enhancements.

Using the Solution – Sage X3 Warehousing

2.15 hours Premiere

In this interactive learning course, you will learn about Sage X3 Warehousing (previously known as GEODE). This learning is made up of two courses that cover general concepts, the creation and review of basics parameters, and the creation of common data. You will also learn about the standard management flows as well as shipment management and stock management as it relates to Sage X3 Warehousing.

Using the Solution – Manufacturing

5-hours Basic, Plus, Premiere

This eLearning course includes multiple videos teaching you common set up and transactions of the stock management, purchasing, and sales processes in Sage X3. This will include how to set up customers, suppliers, and products, an overview of processes performed in each area, and how they work together in moving stock throughout your distribution solution.

Manufacturing Configurator

5-hours Premiere

Attend this webinar to learn how to use the Configurator module in the manufacturing process. This includes usage and methodology, product lines, options and variants, costing, running scripts, entry mode, running automatic configurator, and tools used in defining the configurator scenario details.

Using the Solution – Project Management

50 mins Basic, Plus, Premiere

This eLearning course provides you with an overview of the Project Management module, to understand key concepts, and obtain base knowledge prior to attending the Project Management Fundamentals course. Learn basics for creating projects, managing project tasks and budgets, entering time against projects, impact to financials, and project management integrations.

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Additional Reporting Courses

Welcome to our library of Sage X3 learning opportunities. Attend these courses to build your skills with webinars and training on specific Sage X3 features and functionality:

Crystal Reports Basics

Two 5-hour sessions Plus, Premiere

Attend this webinar to learn about custom report design using Crystal Reports for Sage X3. In this course, you will learn how to design reports in Crystal Reports and how to add reports to folders and run within Sage X3.

Financial Data Extractor

5-hours Plus, Premiere

Attend this webinar to learn how to easily design and generate company specific financial statements and inquiries using Financial Data Extractor in Sage X3. In this hands-on course you will create a financial statement by defining the appropriate parameters and calculations required to generate the report.

Sage Intelligence: Financials

Two 4-hour sessions Plus, Premiere

Attend this webinar to obtain hands-on practice modifying and creating financial reports using the Sage Intelligence Report Designer. You will learn how to use both the Layout Generator and the Task Pane.

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About Sage

Sage is the market leader for integrated accounting, payroll, and payment systems, supporting the ambition of the world's entrepreneurs. Sage began as a small business in the U.K. 30 years ago, and over 13,000 colleagues now support millions of entrepreneurs across 23 countries as they power the global economy. We reinvent and simplify business accounting through brilliant technology, working with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners, and developers.

And as a FTSE 100 business, we are active in supporting our local communities and invest in making a real difference through the philanthropy of the Sage Foundation.

Sage—the market leader for integrated accounting, payroll, and payment systems, supporting the ambition of the world's entrepreneurs.

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