

# sage X3

## *Partner Learning Catalog*

*as of May 21, 2020*



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.



EMPOWERING LEARNING

BUILDING SKILLS

SAGE U

CERTIFICATIONS

PARTNER CURRICULUM

MX3 BOOTCAMP

LEARNING PATHS

COURSES

- Getting Started
- Core Curriculum
- Advanced Curriculum
- Expert Curriculum
- Enterprise Intelligence
- Additional Courses

COURSE SCHEDULE

YOUR SAGE U PROFILE

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, Sage YOUR SAGE U 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.

## 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 practical field experience, continue your learning in our Expert workshops. 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.



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# Sage University

Training when **you** need it

sage X3

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

New products  
and updates



New hires



Next level  
of skills



Certifications



Onboarding



## Tool 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

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# Sage X3 Partner Certifications

## Benefits of certification

Holding a Sage X3 certification provides many benefits. It 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 Financials Consultant

Sage X3 Certified Distribution Consultant

Sage X3 Certified Manufacturing Consultant

Sage X3 Certified Technical Consultant

Sage X3 Certified Developer

Sage X3 Certified Integration Professional

Sage X3 Certified Project Manager

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# Sage X3 Partner Learning Curriculum

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



## Getting Started

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

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** or their role or competency with minimum assistance or supervision.



## Advanced

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

Designed to 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.

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# Mastering Sage X3 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.

Are you a new Sage X3 consultant? This intense consultant enablement learning program provides core product knowledge and implementation methodology required to be a proficient Implementation Consultant or Project Manager.

If you've already attended the core product training, Sage is offering additional learning to expand on your core product knowledge as well as advanced and expert courses that will take your learning to the next level. View the detailed program guides and log on or create a profile to view the additional recommended training for your role.

<h3>Core Technical</h3> <ul style="list-style-type: none"> <li>✓ Install Sage X3 and understand system hardware and server considerations</li> <li>✓ Learn System Administrator functions, concepts, and tools common to Sage X3 modules</li> </ul>	<h3>Core Financials</h3> <ul style="list-style-type: none"> <li>✓ Learn System Administrator functions, concepts, and tools common to Sage X3 modules</li> <li>✓ Get started with the financial functionality through hands-on labs that include setting up a new company based on a defined case study.</li> </ul>	<h3>Core Distribution</h3> <ul style="list-style-type: none"> <li>✓ Get started with the distribution functionality by learning common set up and transaction of the stock management, purchasing, and sales processes</li> <li>✓ Interactive hands-on labs help reinforce the concepts learned</li> </ul>	<h3>Configuring a Solution</h3> <ul style="list-style-type: none"> <li>✓ Project Teams</li> <li>✓ Case study business requirements</li> <li>✓ Implementation methodology and best practice</li> </ul>
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Special bundled price available for complete bootcamp registration.

Register for the MX3 bootcamp bundle on Sage University to take advantage of this special pricing!

Access [Sageu.com/MX3Bootcamp](https://Sageu.com/MX3Bootcamp)  
to view program guides and register

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# Sage X3 Learning Paths

The Sage Partner 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 Partner experiences. **Click the course name for details.**

## LEARNING PATHS




- Sales Consultant
- Pre-Sales Consultant
- Project Manager
- Financials Consultant
- Distribution Consultant
- Customer Service
- Manufacturing Consultant
- Project Management  
(Job Costing) Consultant
- Technical Consultant
- Certified Developer
- Certified Integration  
Developer
- Reporting: SEI
- Reporting: Other

## COURSES




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## YOUR SAGE U PROFILE

## Sales Consultant

 Get Started	 Core Curriculum	★ Advanced Learning	 Certification
<p><b><u>Introduction to Sage X3 for Partners</u></b> 2.5 hours   eLearning</p> <p><b><u>Getting Started with Sage X3</u></b> 1.5 hours   eLearning</p> <p><b><u>Getting Started - Common Data</u></b> 1 hour   eLearning</p> <p><b><u>Getting Started with the Cloud</u></b> 1 hour   eLearning</p>	<p><b><u>Sales Boot Camp</u></b> 32 hours   VILT</p>	N/A	N/A

## Pre-sales Consultant

 Get Started	 Core Curriculum	★ Advanced Learning	 Certification
<p><b><u>Introduction to Sage X3 for Partners</u></b> 2.5 hours   eLearning</p> <p><b><u>Getting Started with Sage X3</u></b> 1.5 hours   eLearning</p> <p><b><u>Getting Started - Common Data</u></b> 1 hour   eLearning</p> <p><b><u>Getting Started with the Cloud</u></b> 1 hour   eLearning</p>	<p><b><u>Understanding the Pre-Sales Process</u></b> 2.5 hours   eLearning</p> <p><b><u>Sales Boot Camp</u></b> 32 hours   VILT</p>	N/A	N/A



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## Project Manager



Get Started



Core Curriculum



Advanced Learning



Certification

### Getting Started with Sage X3

1.5 hours | eLearning

### Getting Started - Common Data

1 hour | eLearning

### Getting Started with the Cloud

1 hour | eLearning

### Project Manager Fundamentals

2 hours | eLearning

### Project Manager Workshop and Certification

36 hours | VILT

### Introduction to Fast Start for Partners

2 hours | eLearning

### **Sage X3 Certified Project Manager**

#### LEARNING PATHS

- Sales Consultant
- Pre-Sales Consultant
- **Project Manager**
- Financials Consultant
- Distribution Consultant
- Customer Service
- Manufacturing Consultant
- Project Management (Job Costing) Consultant
- Technical Consultant
- Certified Developer
- Certified Integration Developer
- Reporting: SEI
- Reporting: Other

#### COURSES

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#### YOUR SAGE U PROFILE



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## Financials Consultant

 Get Started			 Core Curriculum			 Advanced Learning		
<b><u>Introduction to Sage X3 for Partners</u></b> 2.5 hours   eLearning			<b><u>MX3 Bootcamp Bundle</u></b>			<b><u>Advanced Common Tools</u></b> 32.5 hours   VILT		
<b><u>Getting Started with Sage X3</u></b> 1.5 hours   eLearning			<b><u>MX3 Bootcamp: Core Technical</u></b> 40 hours   VILT			<b><u>Advanced Financials</u></b> 36 hours   VILT		
<b><u>Getting Started - Common Data</u></b> 1 hour   eLearning			<b><u>MX3 Bootcamp: Core Financials</u></b> 40 hours   VILT					
<b><u>Getting Started with the Cloud</u></b> 1 hour   eLearning			<b><u>MX3 Bootcamp: Core Distribution</u></b> 40 hours   VILT					
			<b><u>MX3 Bootcamp: Configuring a Solution</u></b> 40 hours   VILT					
 Expert Curriculum			 Additional Learning			 Certification		
<b><u>Expert Financials</u></b> 32.5 hours   VILT			<b><u>Automatic Journals</u></b> 4 hours   VILT			<b><u>Study Guide Document</u></b>		
			<b><u>Understanding and Creating Workflows</u></b> 8 hours   VILT			<b><u>Sample Exam</u></b> 1 hour		
			<b><u>Introduction to Requesters/Queries</u></b> 10 hours   VILT			<b><u>Financials Consultant Exam</u></b> 3 hours		
			<b><u>Fixed Assets</u></b> 5 hours   VILT					

### LEARNING PATHS

- Sales Consultant
- Pre-Sales Consultant
- Project Manager
- **Financials Consultant**
- Distribution Consultant
- Customer Service
- Manufacturing Consultant
- Project Management (Job Costing) Consultant
- Technical Consultant
- Certified Developer
- Certified Integration Developer
- Reporting: SEI
- Reporting: Other

### COURSES

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### YOUR SAGE U PROFILE

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## Distribution Consultant

### LEARNING PATHS

- Sales Consultant
- Pre-Sales Consultant
- Project Manager
- Financials Consultant
- **Distribution Consultant**
- Customer Service
- Manufacturing Consultant
- Project Management (Job Costing) Consultant
- Technical Consultant
- Certified Developer
- Certified Integration Developer
- Reporting: SEI
- Reporting: Other

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### Get Started



### Core Curriculum



### Advanced Learning

#### Introduction to Sage X3 for Partners

2.5 hours | eLearning

#### Getting Started with Sage X3

1.5 hours | eLearning

#### Getting Started - Common Data

1 hour | eLearning

#### Getting Started with the Cloud

1 hour | eLearning

#### MX3 Bootcamp Bundle

##### MX3 Bootcamp: Core Technical

40 hours | VILT

##### MX3 Bootcamp: Core Financials

40 hours | VILT

##### MX3 Bootcamp: Core Distribution

40 hours | VILT

##### MX3 Bootcamp: Configuring a Solution

40 hours | VILT

#### Advanced Common Tools

32.5 hours | VILT

#### Advanced Distribution

36 hours | VILT



### Expert Curriculum



### Additional Learning



### Certification

#### Expert Distribution

32.5 hours | VILT

#### Understanding and Creating Workflows

8 hours | VILT

#### Study Guide

Document

#### Sample Exam

1 hour

#### Distribution Consultant Exam

3 hours

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## LEARNING PATHS





- Sales Consultant
- Pre-Sales Consultant
- Project Manager
- Financials Consultant
- Distribution Consultant
- **Customer Service**
- Manufacturing Consultant
- Project Management (Job Costing) Consultant
- Technical Consultant
- Certified Developer
- Certified Integration Developer
- Reporting: SEI
- Reporting: Other

## COURSES

## COURSE SCHEDULE

## YOUR SAGE U PROFILE







## Customer Service

 Get Started	 Core Curriculum	 Advanced Learning	 Certification
<b><u>Getting Started with Sage X3</u></b> 1.5 hours   eLearning	<b><u>Managing Leads and Prospects</u></b> 5 hours   VILT	N/A	N/A
<b><u>Getting Started - Common Data</u></b> 1 hour   eLearning	<b><u>Managing After-Sales Services</u></b> 5 hours   VILT		
<b><u>Getting Started with the Cloud</u></b> 1 hour   eLearning			

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## Manufacturing Consultant

 Get Started			 Core Curriculum			 Advanced Learning		
<b><u>Introduction to Sage X3 for Partners</u></b> 2.5 hours   eLearning			<b><u>MX3 Bootcamp Bundle</u></b>  <b><u>MX3 Bootcamp: Core Technical</u></b> 40 hours   VILT  <b><u>MX3 Bootcamp: Core Distribution</u></b> 40 hours   VILT  <b><u>MX3 Bootcamp: Core Manufacturing</u></b> 40 hours   VILT			<b><u>Advanced Common Tools</u></b> 32.5 hours   VILT  <b><u>Advanced Manufacturing</u></b> 32.5 hours   VILT		
<b><u>Getting Started with Sage X3</u></b> 1.5 hours   eLearning								
<b><u>Getting Started - Common Data</u></b> 1 hour   eLearning								
<b><u>Getting Started with the Cloud</u></b> 1 hour   eLearning								
 Expert Curriculum			 Additional Learning			 Certification		
<b><u>Expert Manufacturing</u></b> 32.5 hours   VILT			<b><u>Manufacturing Configurator</u></b> 5 hours   VILT  <b><u>Understanding and Creating Workflows</u></b> 8 hours   VILT  <b><u>Non-conformance Management</u></b> 2 hours   eLearning  <b><u>Introduction to Sage X3 Warehousing</u></b> 30 min   eLearning  <b><u>Using the Solution: Sage X3 Warehousing</u></b> 2+ hours   eLearning			<b><u>Study Guide Document</u></b>  <b><u>Sample Exam</u></b> 1 hour  <b><u>Manufacturing Consultant Exam</u></b> 3 hours		

### LEARNING PATHS

- Sales Consultant
- Pre-Sales Consultant
- Project Manager
- Financials Consultant
- Distribution Consultant
- Customer Service
- **Manufacturing Consultant**
- Project Management (Job Costing) Consultant
- Technical Consultant
- Certified Developer
- Certified Integration Developer
- Reporting: SEI
- Reporting: Other

### COURSES





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# Sage X3 Learning Paths

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## Project Management (Job Costing) Consultant

 Get Started	 Core Curriculum	 Advanced Learning	 Certification
<p><b><u>Getting Started with Sage X3</u></b> 1.5 hours   eLearning</p> <p><b><u>Getting Started - Common Data</u></b> 1 hour   eLearning</p> <p><b><u>Getting Started with the Cloud</u></b> 1 hour   eLearning</p>	<p><b><u>Using the Solution: Project Management</u></b> 1.5 hours   eLearning</p> <p><b><u>Project Management Fundamentals</u></b> 18 hours   VILT</p>	N/A	N/A

### LEARNING PATHS

- Sales Consultant
- Pre-Sales Consultant
- Project Manager
- Financials Consultant
- Distribution Consultant
- Customer Service
- Manufacturing Consultant
- **Project Management (Job Costing) Consultant**
- Technical Consultant
- Certified Developer
- Certified Integration Developer
- Reporting: SEI
- Reporting: Other

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## Technical Consultant

 Get Started			 Core Curriculum			 Advanced Learning		
<b><u>Introduction to Sage X3 for Partners</u></b> 2.5 hours   eLearning			<b><u>MX3 Bootcamp Bundle</u></b>  <b><u>MX3 Bootcamp: Core Technical</u></b> 40 hours   VILT			<b><u>Advanced Common Tools</u></b> 32.5 hours   VILT  <b><u>Advanced Technical</u></b> 36 hours   VILT		
<b><u>Getting Started with Sage X3</u></b> 1.5 hours   eLearning								
<b><u>Getting Started - Common Data</u></b> 1 hour   eLearning								
<b><u>Getting Started with the Cloud</u></b> 1 hour   eLearning								
 Expert Curriculum			 Additional Learning			 Certification		
<b><u>Expert Architecture</u></b> 32.5 hours   VILT			<b><u>Understanding and Creating Workflows</u></b> 8 hours   VILT  <b><u>Introduction to Requesters/Queries</u></b> 10 hours   VILT  <b><u>Upgrading from v6 to v12</u></b> 15 hours   VILT			<b><u>Study Guide Document</u></b>  <b><u>Sample Exam</u></b> 1 hour  <b><u>Technical Consultant Exam</u></b> 3 hours		

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- Project Manager
- Financials Consultant
- Distribution Consultant
- Customer Service
- Manufacturing Consultant
- Project Management (Job Costing) Consultant
- **Technical Consultant**
- Certified Developer
- Certified Integration Developer
- Reporting: SEI
- Reporting: Other

### COURSES







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## Certified Developer

 Get Started			 Core Curriculum			 Advanced Learning		
<b><u>Getting Started with Sage X3</u></b> 1.5 hours   eLearning			<b><u>MX3 Bootcamp: Core Technical</u></b> 40 hours   VILT			<b><u>Advanced Common Tools</u></b> 32.5 hours   VILT		
<b><u>Getting Started - Common Data</u></b> 1 hour   eLearning			<b><u>Developer Basics</u></b> 25 hours   VILT					
<b><u>Getting Started with the Cloud</u></b> 1 hour   eLearning								
 Expert Curriculum			 Additional Learning			 Certification		
<b><u>Expert Developer</u></b> 32.5 hours   VILT			N/A			<b><u>Study Guide Document</u></b>  <b><u>Sample Exam</u></b> 1 hour  <b><u>Certified Developer Exam</u></b> 3 hours		

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- Project Manager
- Financials Consultant
- Distribution Consultant
- Customer Service
- Manufacturing Consultant
- Project Management (Job Costing) Consultant
- Technical Consultant
- **Certified Developer**
- Certified Integration Developer
- Reporting: SEI
- Reporting: Other

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## LEARNING PATHS







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- Project Manager
- Financials Consultant
- Distribution Consultant
- Customer Service
- Manufacturing Consultant
- Project Management (Job Costing) Consultant
- Technical Consultant
- Certified Developer
- **Certified Integration Developer**
- Reporting: SEI
- Reporting: Other

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## Certified Integration Developer

 Get Started			 Core Curriculum			 Advanced Learning		
<b><u>Getting Started with Sage X3</u></b> 1.5 hours   eLearning			<b><u>MX3 Bootcamp: Core Technical</u></b> 40 hours   VILT			<b><u>Advanced Common Tools</u></b> 32.5 hours   VILT		
<b><u>Getting Started - Common Data</u></b> 1 hour   eLearning			<b><u>Developer Basics</u></b> 25 hours   VILT			<b><u>Web Services</u></b> 15 hours   VILT		
<b><u>Getting Started with the Cloud</u></b> 1 hour   eLearning								
 Expert Curriculum			 Additional Learning			 Certification		
<b><u>Expert Developer</u></b> 32.5 hours   VILT			N/A			<b><u>Study Guide Document</u></b>  <b><u>Sample Exam</u></b> 1 hour  <b><u>Certified Integration Professional Exam</u></b> 4+ hours		

# Sage X3 Learning Paths

The Sage Partner 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 Partner experiences. **Click the course name for details.**

## Reporting and Analytics: Sage Enterprise Intelligence

Get Started	Core Curriculum	Advanced Learning	Certification
<a href="#"><u>Getting Started with Sage X3</u></a> 1.5 hours   eLearning  <a href="#"><u>Getting Started - Common Data</u></a> 1 hour   eLearning  <a href="#"><u>Getting Started with the Cloud</u></a> 1 hour   eLearning	<a href="#"><u>Getting Started with the Basics</u></a> 5 hours   VILT  <a href="#"><u>Using the SEI Add in for Excel</u></a> 5 hours   VILT  <a href="#"><u>Report Designer</u></a> 4 hours   VILT  <a href="#"><u>Formatting, Filtering and Sorting</u></a> 3.5 hours   VILT	<a href="#"><u>SEI Installing and Configuring</u></a> 6 hours   VILT  <a href="#"><u>Administration &amp; Security</u></a> 5 hours   VILT	N/A

## Reporting and Analytics: Other

Get Started	Core Curriculum	Advanced Learning	Certification
<a href="#"><u>Getting Started with Sage X3</u></a> 1.5 hours   eLearning  <a href="#"><u>Getting Started - Common Data</u></a> 1 hour   eLearning  <a href="#"><u>Getting Started with the Cloud</u></a> 1 hour   eLearning	<a href="#"><u>Crystal Reports Basics</u></a> 10 hours   VILT	N/A	N/A

### LEARNING PATHS

- Sales Consultant
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- Financials Consultant
- Distribution Consultant
- Customer Service
- Manufacturing Consultant
- Project Management (Job Costing) Consultant
- Technical Consultant
- Certified Developer
- Certified Integration Developer
- **Reporting: SEI**
- **Reporting: Other**

### COURSES

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### YOUR SAGE U PROFILE

# 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.**

## Introduction to Sage X3 for Partners



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.
- And, Explore the potential business outcomes to organizations using Sage X3.

## Getting Started with Sage X3



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



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



This learning package will introduce you to the architecture and overview/benefits of Sage X3 Cloud including the differences between 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

## LEARNING PATHS

### COURSES

- **Getting Started**
- Core Curriculum
- Advanced Curriculum
- Expert Curriculum
- SEI
- Additional Learning

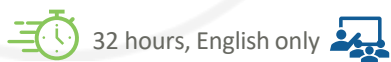
## COURSE SCHEDULE

## YOUR SAGE U PROFILE

# Sage X3: Core Curriculum

## Welcome to the Core Sales & Pre-Sales Core Requirements

### Sales Boot Camp



### Objectives

The Sage X3 Sales Bootcamp is highly interactive and designed to equip attendees with the skills and knowledge to effectively position the Sage X3 solution with a customer. We do that by understanding the key components of the Sage X3 proposition and applying that through understanding the Buyers Mindset. The Buyers Mindset is a model of the stages a customer moves through in arriving at a decision to buy. It helps explain why different people appear to be at different stages of readiness to commit to a purchase and why different strategies are necessary to facilitate movement with different customers.

### Who should attend?

- Sales Managers
- Field and Inside Salespeople
- Pre-Sales Engineers

### Program Guide

View the [Sage X3 Sales Brochure](#) for more information on prerequisites and what you will learn during this training.

### Understanding the Pre-Sales Process



This interactive learning course will help you understand your role on the team by guiding you through an introduction to the sales engagement process. This includes working with discovery documents, personalizing the demo, presentation tips and tricks, and last, how to wrap up after the demonstration.

#### LEARNING PATHS

#### COURSES

- Getting Started
- Core Curriculum
  - Core Sales and Pre-Sales
  - Core Project Manager Workshop
  - Core Technical
  - Core Financials
  - Core Distribution
  - Core Manufacturing
  - Configuring the Solution-Implementation Workshop
  - Developer Basics
- Advanced Curriculum
- Expert Curriculum
- SEI
- Additional Learning

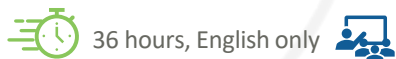
#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE



# 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.

#### LEARNING PATHS

##### COURSES

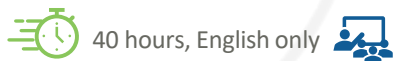
- Getting Started
- Core Curriculum
  - Core Sales and Pres-Sales
  - **Core Project Manager Workshop**
  - Core Technical
  - Core Financials
  - Core Distribution
  - Core Manufacturing
  - Configuring the Solution-Implementation Workshop
  - Developer Basics
- Advanced Curriculum
- Expert Curriculum
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Core Curriculum

## Welcome to MX3 Bootcamp: Core Technical Course



### Objectives

This interactive course will enable delegates to learn how to successfully install Sage X3 including system hardware and server considerations.

Delegates will learn the System Administrator functions, concepts, tools and functions common to all Sage X3 modules.

Once the course is completed you will be able to install Sage X3 and patch the application, configure basic security, create/edit navigation and landing pages, create custom queries and process flows, and configure the basic technical settings of the application.



### Certifications related to this course:

- 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

### Who should attend?

Consultants who are responsible for pre-sales engineering and implementing and supporting the Sage X3 solution for customers. You will have multiple opportunities throughout the training to interact with the instructor and gain valuable hands-on experience working with the 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.

Attending multiple weeks?  
Special bundled pricing is available!  
**[Sageu.com/MX3Bootcamp](https://Sageu.com/MX3Bootcamp)**

### LEARNING PATHS

#### COURSES

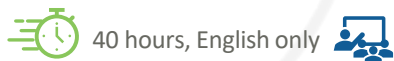
- Getting Started
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  - Core Sales and Pres-Sales
  - Core Project Manager Workshop
  - **Core Technical**
  - Core Financials
  - Core Distribution
  - Core Manufacturing
  - Configuring the Solution-Implementation Workshop
  - Developer Basics
- Advanced Curriculum
- Expert Curriculum
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Core Curriculum

## Welcome to MX3 Bootcamp: Core Financials Course



40 hours, English only

### Objectives

In this interactive course delegates will learn how to get started with the financial functionality of Sage X3 by setting up a new company based on a defined case study.

Delegates are required to complete 8 ½ hours of eLearning courses that provide you with the necessary information to understand key functions for Financials as well as the skills necessary to complete the case study labs in the VILT training. The required pre-work is automatically added to your transcript in Sage YOUR SAGE U upon successful registration.

Throughout this training, you will learn the general ledger account structure and transactions, an overview of common accounts receivable and payable processes, and basics of financial reporting capabilities.

Upon completion of the class, additional post-work eLearning will be added to your transcript to complete the Core Financials course. By the end of the course you will be able to set up an out of the box client account system and undertake customization.



### Certifications related to this course:

- Sage X3 Certified Financial Consultant

### Who should attend?

Consultants who are responsible for implementing and supporting the Financials solution for Sage X3 for customers. You will have multiple opportunities throughout the training to interact with the instructor and gain valuable hands-on experience working with the 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.

Attending multiple weeks?  
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[Sageu.com/MX3Bootcamp](https://Sageu.com/MX3Bootcamp)

### LEARNING PATHS

#### COURSES

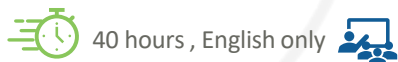
- Getting Started
- Core Curriculum
  - Core Sales and Pres-Sales
  - Core Project Manager Workshop
  - Core Technical
  - **Core Financials**
  - Core Distribution
  - Core Manufacturing
  - Configuring the Solution-Implementation Workshop
  - Developer Basics
- Advanced Curriculum
- Expert Curriculum
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Core Curriculum

## Welcome to MX3 Bootcamp: Core Distribution Course



40 hours , English only

### Objectives

In this interactive course you will learn common set up and transactions of the stock management, purchasing, and sales processes in Sage X3.

You will learn how to set up stock and manage inventory, customer transactions for sales and supplier purchasing. This will include price set up, ordering, delivery, invoicing, and any miscellaneous transactions associated with stock management.

By the end of the week you will be able to run your warehouses, purchasing and sale of stock from suppliers and to customers.



### Certifications related to this course:

- Sage X3 Certified Distribution Consultant
- Sage X3 Certified Manufacturing Consultant

### Who should attend?

Consultants who are responsible for implementing and supporting the Distribution solution for Sage X3 for customers. You will have multiple opportunities throughout the training to interact with the instructor and gain valuable hands-on experience working with the 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.

Attending multiple weeks?  
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### LEARNING PATHS

#### COURSES

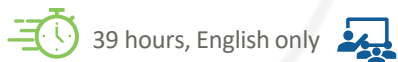
- Getting Started
- Core Curriculum
  - Core Sales and Pres-Sales
  - Core Project Manager Workshop
  - Core Technical
  - Core Financials
  - **Core Distribution**
  - Core Manufacturing
  - Configuring the Solution-Implementation Workshop
  - Developer Basics
- Advanced Curriculum
- Expert Curriculum
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Core Curriculum

## Welcome to MX3 Bootcamp: Core Manufacturing Course



39 hours, English only

### Objectives

This interactive course is designed for the consultant responsible for implementing and configuring the Manufacturing solution for Sage X3.

The course has three main areas of learning: Basics, Beyond the Basics, and an Interactive Workshop. You will have multiple opportunities throughout the training to interact with the instructor and gain valuable hands-on experience working with the program by completing various activities and labs.

This course must be completed prior to attending the Advanced Manufacturing course.



### Certifications related to this course:

- Sage X3 Certified Manufacturing Consultant

### Who should attend?

Consultants who are responsible for implementing and supporting the Manufacturing solution for Sage X3 for customers. You will have multiple opportunities throughout the training to interact with the instructor and gain valuable hands-on experience working with the 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.

Attending multiple weeks?  
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**[Sageu.com/MX3Bootcamp](https://Sageu.com/MX3Bootcamp)**

### LEARNING PATHS

#### COURSES

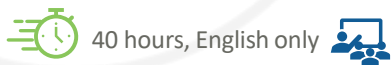
- Getting Started
- Core Curriculum
  - Core Sales and Pres-Sales
  - Core Project Manager Workshop
  - Core Technical
  - Core Financials
  - Core Distribution
  - **Core Manufacturing**
  - Configuring the Solution-Implementation Workshop
  - Developer Basics
- Advanced Curriculum
- Expert Curriculum
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Core Curriculum

## Welcome to MX3 Bootcamp: Configuring the Solution – Implementation Workshop



40 hours, English only

### Objectives

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

Using actual customer implementation scenarios, you will work within a project team to review and make decisions to best configure the system and meet the needs of your client. There are assigned tasks and discussion points with the instructor and other attendees, to share approaches and outcomes.

During the week delegates gain confidence and proficiency having worked through real life examples with your peers and being provided with best practice advice and support.

The workshop serves to reinforce prior learning and to introduce the implementation process. By the end of the course delegates can describe the basic stages of Sage X3 implementation.

### Who should attend?

Project Managers and Implementation consultants (Financials, Distribution, Manufacturing and Technical) responsible for managing and implementing the Sage X3 solution for a customer.

### Program Guide

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



### Certifications related to this course:

- Sage X3 Certified Financials Consultant
- Sage X3 Certified Distribution Consultant

#### LEARNING PATHS

##### COURSES

- Getting Started
- Core Curriculum
  - Core Sales and Pres-Sales
  - Core Project Manager Workshop
  - Core Technical
  - Core Financials
  - Core Distribution
  - Core Manufacturing
  - **Configuring the Solution-Implementation Workshop**
  - Developer Basics
- Advanced Curriculum
- Expert Curriculum
- SEI
- Additional Learning

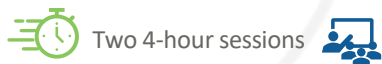
#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE



# Sage X3: Core Curriculum

## Welcome to the Developer Basics Course



Two 4-hour sessions

### Objectives

In this interactive 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.

### Who should attend?

Consultants who are responsible for installing and supporting Sage X3 and developers creating customizations for the Sage X3 solution.

### Recommended Prerequisites

To complete the Sage X3 course and associated Certification, you should:

- Review the Sage X3 – Getting Started with Sage X3 and Sage X3 – Getting Started: Using the Solution – Common Data eLearning courses
- Attend the Sage X3 – Common Tools course
- Attend the Sage X3 – System Administrator course



### Certifications related to this course:

- Sage X3 Certified Developer
- Sage X3 Certified Integration Developer

### 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

#### LEARNING PATHS

##### COURSES

- Getting Started
- Core Curriculum
  - Core Sales and Pres-Sales
  - Core Project Manager Workshop
  - Core Technical
  - Core Financials
  - Core Distribution
  - Core Manufacturing
  - Configuring the Solution-Implementation Workshop
  - **Developer Basics**
- Advanced Curriculum
- Expert Curriculum
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Advanced Curriculum

## Welcome to the Advanced Common Tools Course

 32.5 hours, English only



### 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.

### Who should attend?

Consultants who plan to install Sage X3, implement and support customers, and Developers planning to develop an integration with Sage X3.

### Program Guide

View the Sage MX3 Consultant Bootcamp [Advanced Program Guide](#) for more information on prerequisites and what you will learn during this training.

#### LEARNING PATHS

##### COURSES

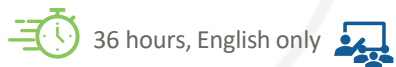
- Getting Started
- Core Curriculum
- Advanced Curriculum
  - **Advanced Common Tools**
  - Advanced Financials
  - Advanced Distribution
  - Advanced Manufacturing
  - Advanced Technical
  - Web Services
- Expert Curriculum
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Advanced Curriculum

## Welcome to Advanced Financials



36 hours, English only

### 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'll configure on most project implementations. This workshop is very interactive with assigned tasks and discussion points with the instructor and other attendees, to share approaches and outcomes.



### Certifications related to this course:

- Sage X3 Certified Financial Consultant

### Who should attend?

Consultants who plan to install Sage X3, implement and support customers, and Developers planning to develop an integration with Sage X3.

### Program Guide

View the Sage MX3 Consultant Bootcamp [Advanced Program Guide](#) for more information on prerequisites and what you will learn during this training.

#### LEARNING PATHS

##### COURSES

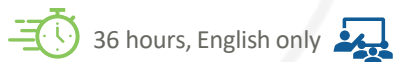
- Getting Started
- Core Curriculum
- Advanced Curriculum
  - Advanced Common Tools
  - **Advanced Financials**
  - Advanced Distribution
  - Advanced Manufacturing
  - Advanced Technical
  - Web Services
- Expert Curriculum
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Advanced Curriculum

## Welcome to Advanced Distribution



36 hours, English only

### 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.



### Certifications related to this course:

- Sage X3 Certified Distribution Consultant

### Who should attend?

Consultants who plan to install Sage X3, implement and support customers, and Developers planning to develop an integration with Sage X3.

### Program Guide

View the Sage MX3 Consultant Bootcamp [Advanced Program Guide](#) for more information on prerequisites and what you will learn during this training.

#### LEARNING PATHS

##### COURSES

- Getting Started
- Core Curriculum
  - Advanced Curriculum
    - Advanced Common Tools
    - Advanced Financials
    - **Advanced Distribution**
    - Advanced Manufacturing
    - Advanced Technical
    - Web Services
- Expert Curriculum
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Advanced Curriculum

## Welcome to Advanced Manufacturing

 32.5 hours, English only



### 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.



### Certifications related to this course:

- Sage X3 Certified Manufacturing Consultant

### Who should attend?

Consultants who plan to install Sage X3, implement and support customers, and Developers planning to develop an integration with Sage X3.

### Program Guide

View the Sage MX3 Consultant Bootcamp [Advanced Program Guide](#) for more information on prerequisites and what you will learn during this training.

#### LEARNING PATHS

##### COURSES

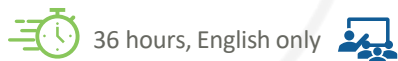
- Getting Started
- Core Curriculum
- Advanced Curriculum
  - Advanced Common Tools
  - Advanced Financials
  - Advanced Distribution
  - **Advanced Manufacturing**
  - Advanced Technical
  - Web Services
- Expert Curriculum
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Advanced Curriculum

## Welcome to Advanced Technical



36 hours, English only

### 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.



### Certifications related to this course:

- Sage X3 Certified Technical Consultant

### Who should attend?

Consultants who plan to install Sage X3, implement and support customers, and Developers planning to develop an integration with Sage X3.

### Program Guide

View the Sage MX3 Consultant Bootcamp [Advanced Program Guide](#) for more information on prerequisites and what you will learn during this training.

#### LEARNING PATHS

##### COURSES

- Getting Started
- Core Curriculum
- Advanced Curriculum
  - Advanced Common Tools
  - Advanced Financials
  - Advanced Distribution
  - Advanced Manufacturing
  - **Advanced Technical**
  - Web Services
- Expert Curriculum
- SEI
- Additional Learning

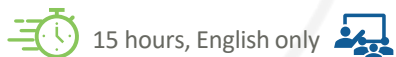
#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE



# Sage X3: Advanced Curriculum

## Welcome to the Web Services Course



15 hours, English only



### Objectives

In this interactive 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.

### Who should attend?

Developer Professionals wanting to expand their Sage X3 developer capabilities by utilizing web services to create an integration between Sage X3 and another application.

### Recommended Prerequisites

To complete the Sage X3 course and associated certification, you should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 and Sage X3 – Getting Started: Using the Solution – Common Data eLearning courses
- Attend the Sage X3 – Common Tools course
- Attend the Sage X3 – System Administrator course
- Attend the Sage X3 – Developer 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



### Certifications related to this course:

- Sage X3 Certified Integration Developer

#### LEARNING PATHS

##### COURSES

- Getting Started
- Core Curriculum
- Advanced Curriculum
  - Advanced Common Tools
  - Advanced Financials
  - Advanced Distribution
  - Advanced Manufacturing
  - Advanced Technical
  - **Web Services**
- Expert Curriculum
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Expert Curriculum

## Welcome to Expert Financials

 32.5 hours, English only



### 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.



### Certifications related to this course:

- Sage X3 Certified Financial Consultant

### Who should attend?

Consultants who plan to install Sage X3, implement and support customers, and Developers planning to develop an integration with Sage X3.

### Program Guide

View the Sage MX3 Consultant Bootcamp [Expert Program Guide](#) for more information on prerequisites and what you will learn during this training.

#### LEARNING PATHS

##### COURSES

- Getting Started
- Core Curriculum
- Advanced Curriculum
- Expert Curriculum
  - Financials
  - Distribution
  - Manufacturing
  - Architecture
  - Developer
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Expert Curriculum

## Welcome to Expert Distribution



32.5 hours, English only



### 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.



### Certifications related to this course:

- Sage X3 Certified Distribution Consultant

### Who should attend?

Consultants who plan to install Sage X3, implement and support customers, and Developers planning to develop an integration with Sage X3.

### Program Guide

View the Sage MX3 Consultant Bootcamp [Expert Program Guide](#) for more information on prerequisites and what you will learn during this training.

#### LEARNING PATHS

##### COURSES

- Getting Started
- Core Curriculum
- Advanced Curriculum
- Expert Curriculum
  - Financials
  - **Distribution**
  - Manufacturing
  - Architecture
  - Developer
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Expert Curriculum

## Welcome to Expert Manufacturing

 32.5 hours, English only



### 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.

### Who should attend?

Consultants who plan to install Sage X3, implement and support customers, and Developers planning to develop an integration with Sage X3.

### Program Guide

View the Sage MX3 Consultant Bootcamp [Expert Program Guide](#) for more information on prerequisites and what you will learn during this training.



### Certifications related to this course:

- Sage X3 Certified Manufacturing Consultant

#### LEARNING PATHS

##### COURSES

- Getting Started
- Core Curriculum
- Advanced Curriculum
- Expert Curriculum
  - Financials
  - Distribution
  - **Manufacturing**
  - Architecture
  - Developer
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Expert Curriculum

## Welcome to Expert Architecture

 32.5 hours, English only



### 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 Architecture implementation scenarios that you will configure in most implementations.

Attendees will work on several installation cases, single-tier, multi-tier, single-runtime, multi-runtime, single-Syracuse, multi-Syracuse and clustered MongoDB Delegates will be able to build scalable and reliable Sage X3 environments and at the end will have a better knowledge of MongoDB.



### Certifications related to this course:

- Sage X3 Certified Technical Consultant

### Who should attend?

Consultants who plan to install Sage X3, implement and support customers, and Developers planning to develop an integration with Sage X3.

### Program Guide

View the Sage MX3 Consultant Bootcamp [Expert Program Guide](#) for more information on prerequisites and what you will learn during this training.

#### LEARNING PATHS

##### COURSES

- Getting Started
- Core Curriculum
- Advanced Curriculum
- Expert Curriculum
  - Financials
  - Distribution
  - Manufacturing
  - **Architecture**
  - Developer
- SEI
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Sage X3: Expert Curriculum

## Welcome to Expert Developer

 32.5 hours, English only



### Objectives

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

Delegates will develop scripts to handle all rules and events within the different Sage X3 technology 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).



### Certifications related to this course:

- Sage X3 Certified Developer
- Sage X3 Certified Integration Developer

### Who should attend?

Consultants who plan to install Sage X3, implement and support customers, and Developers planning to develop an integration with Sage X3.

### Program Guide

View the Sage MX3 Consultant Bootcamp [Expert Program Guide](#) for more information on prerequisites and what you will learn during this training.

#### LEARNING PATHS

##### COURSES

- Getting Started
- Core Curriculum
- Advanced Curriculum
- Expert Curriculum
  - Financials
  - Distribution
  - Manufacturing
  - Architecture
  - **Developer**
- SEI
- Additional Learning

##### COURSE SCHEDULE

##### YOUR SAGE U PROFILE

# 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



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 - Using the SEI Add in for Excel



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 - Report Designer



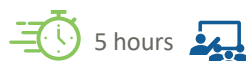
Attend this webinar to learn how to create and customize dynamic operational and financial reports using the Report Designer in Sage Enterprise Intelligence. This includes accessing existing reports and creating new reports, importin SEI worksheets into reports, and customizing reports to meet a company's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

## SEI - Formatting, Filtering, and Sorting



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 - Administration and Security



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.

### LEARNING PATHS

#### COURSES

- Getting Started
- Core Curriculum
- Advanced Curriculum
- Expert Curriculum
- **SEI**
- Additional Learning

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Additional Financial Courses

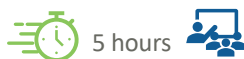
Welcome to our library of Sage X3 learning opportunities. Attend these courses to build your skills with webinars and training on specific Sage X3 features and functionality:

## Automatic Journals



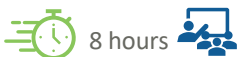
Attend this webinar to learn the structure of and how to configure and use Auto Journals. You will learn best practices for customizing to your needs, including using accounting codes. Also covered are the most used auto journals you may want to consider implementing in Sage X3.

## Fixed Assets



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.

## Understanding and Creating Workflows



Attend this webinar to find out how you can use the workflow feature to improve efficiency and manage data within Sage X3. You will learn how to define parameters that impact workflow functionality, create simple workflows using Notifications, create advanced workflows using Workflow Rules containing Signature events, actions, and advanced receipt selections, and use the Workflow monitor to view events triggered by a workflow.

## Operating Budgets



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.

### LEARNING PATHS

#### COURSES

- Getting Started
- Core Curriculum
- Advanced Curriculum
- Expert Curriculum
- SEI
- Additional Learning
  - Financial Courses
  - Customer Svc Courses
  - Operational Courses
  - Reporting Courses
  - Implementation Courses

#### COURSE SCHEDULE

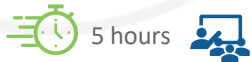
#### YOUR SAGE U PROFILE



# Additional Customer Service Courses

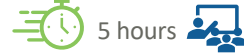
Welcome to our library of Sage X3 learning opportunities. Attend these courses to build your skills with webinars and training on specific Sage X3 features and functionality:

## Managing Leads and Prospects



This interactive learning course will teach you to create common data required for managing Leads and Prospects, assign Leads and Prospects to the various sales staff according to their sector, initiate various After-sales flows relating to sales, create projects, tasks, and calls associated with specific Leads and Prospects, and set the parameters linked to the behavior of sales actions.

## Managing After-Sales Services



This interactive learning course will teach you 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.

### LEARNING PATHS

#### COURSES

- Getting Started
- Core Curriculum
- Advanced Curriculum
- Expert Curriculum
- SEI
- Additional Learning
  - Financial Courses
  - **Customer Svc Courses**
  - Operational Courses
  - Reporting Courses
  - Implementation Courses

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Additional Operational Courses

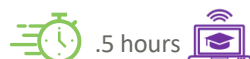
Welcome to our library of Sage X3 learning opportunities. Attend these courses to build your skills with webinars and training on specific Sage X3 features and functionality:

## Using the Solution – Distribution



In this interactive course you will learn common set up and transactions of the stock management, purchasing, and sales processes in Sage X3 including how to set up Partners, 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



This interactive 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.

## Using the Solution: Sage X3 Warehousing



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



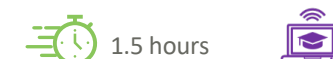
This interactive eLearning course includes multiple videos teaching you common set up and transactions of the stock management, purchasing, and sales processes in Sage X3. This will include how to set up Partners, suppliers, and products, an overview of processes performed in each area, and how they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

## Manufacturing Configurator



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



This interactive 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.

## Non-conformance Management



This interactive eLearning course provides you with an overview of non-conformance setup requirements focusing on the Activity Codes, User and General Parameters, Misc. Tables, Actions and User Rights, as well as details of the NC process.

### LEARNING PATHS

#### COURSES

- Getting Started
- Core Curriculum
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- Additional Learning
  - Financial Courses
  - Customer Svc Courses
  - **Operational Courses**
  - Reporting Courses
  - Implementation Courses

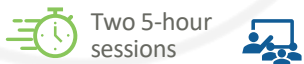
#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# 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:

## Introduction to Requesters/Queries



Attend this webinar to learn 3 methods of creating Requesters/Queries. You will learn to create views, which can be used to increase the speed at which data can be returned from a requester/query. Additionally, learn about presentation of data from a requester/query either on the Landing Page and exporting to a Spreadsheet, or Dashboard Views.

## Crystal Reports Basics



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.

### LEARNING PATHS

#### COURSES

- Getting Started
- Core Curriculum
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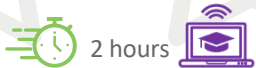
#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

# Additional Implementation Courses

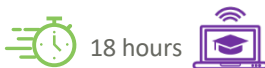
Welcome to our library of Sage X3 learning opportunities. Attend these courses to build your skills with webinars and training on specific Sage X3 features and functionality:

## Introduction to Fast Start for Partners



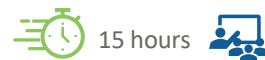
In this learning experience, you will discover information about Sage X3 Fast Start; an implementation strategy for Sage X3. Information in this course will help you to explain and promote Fast Start to a prospective customer, qualify a sales deal, and drive customers towards a successful implementation. You will also learn about the Fast Start implementation methodology and concepts, toolkit and setup kit for Sage X3, and the roles both you as a partner and your customer have to ensure a successful implementation.

## Project Management Fundamentals



This eLearning course covers the project implementation fundamentals and the STREAM implementation methodology used by Sage when implementing Sage products in businesses. The STREAM methodology is presented and aims to unify the global process used by all Sage Colleagues. You will learn about the stages of a project, project governance and management, as well as who typical stakeholders are. BEFORE your purchase or register for this individual course, verify if your organization has already purchased this subscription. If so, register for the Sage X3 - STREAM Toolkit Subscription learning package by clicking [here](#). If you are interested in subscribing, go to [www.sageu.com/STREAM](http://www.sageu.com/STREAM) to learn more and register.

## Upgrading from v6 to v12



Attend this webinar to learn to upgrade your Sage X3 customers from v6 to v12. This includes understanding the overall upgrade process, how to prepare the data prior to upgrading, how to copy and upgrade the data to a new installation of Sage X3 v12, and important troubleshooting tips learned by our own Sage upgrade experts. You will learn best practice lessons from experienced consultants who have performed multiple upgrades and complete an actual v6 to v12 upgrade through the hands-on interactive workshop.

### LEARNING PATHS

#### COURSES

- Getting Started
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  - **Implementation Courses**

#### COURSE SCHEDULE

#### YOUR SAGE U PROFILE

**\*This course is only offered in English**

# Create Your Sage University Profile

## Step 1: Create your Profile

- Have your Sage Account Number handy. This will start with a 4xxxxxxx
- **Use this link** to access the online form
- Complete the form

## Step 2: Log in with your profile

- Access **www.sageu.com**
- At the top, select the Login link
- Log in using your profile



Log On or Choose Your Country/ Region



You can now search the pages by Role or by topic and register for training courses.



Access your transcript, to view eLearning or attend a Virtual Class you have registered for, and to view past training completed.



If you have any issues, contact **sageuniversity@sage.com**.

EMPOWERING LEARNING

BUILDING SKILLS

SAGE U

CERTIFICATIONS

PARTNER CURRICULUM

MX3 BOOTCAMP

LEARNING PATHS

COURSES

- Getting Started
- Core Curriculum
- Advanced Curriculum
- Expert Curriculum
- Enterprise Intelligence
- Additional Learning

COURSE SCHEDULE

**YOUR SAGE U PROFILE**

# 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.*

For more information, visit [www.sage.com](https://www.sage.com)

