Sage

X3 Customer Learning Catalog

Table of contents

Sage University

Role Based Learning

Build your 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.

Learn from the experts and become one yourself.

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

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

To register for courses and certifications visit **www.sageu.com**

Training when *you* need it

Learning Life Cycle

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

Tools for your learning journey:

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

| Implementation | → | Next level of skills | → | New roles | → | New hires | → | New products and updates |
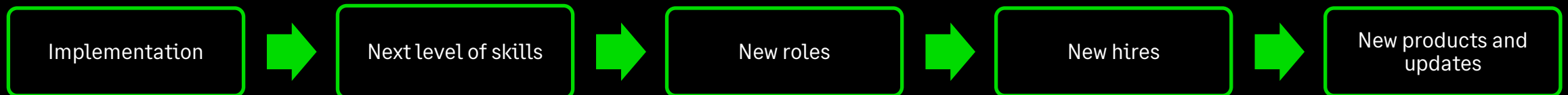
Customers Learning Curriculum

The learning paths are designed to provide a progressive learning experience from beginner to expert level.

1 **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.

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

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

3 **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.

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

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.

Sage X3 Learning Membership

What is a Sage University Learning Membership?

A Sage University Learning Membership is a company-wide subscription for customers to access training through Sage University.

Sage University Learning Memberships give organizations **full access** to Sage University **learning** for **everyone in an organization** through an annual subscription.

There are three levels of membership available to provide an economical and convenient way for them to access learning at exactly the time they need.

BASIC 🔒

PLUS 🔒🔒

PREMIER 🔒🔒🔒

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

Customer Learning Membership Level

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

* Includes only Core Customer Certifications   ** Includes both Core and Advanced Customer Certifications

Accounting Manager

Getting Started	Core	Additional	Advanced	Expert

Getting Started:
Introduction to Sage X3

Getting Started:
Common Data

Intro and Overview: Financial and Distribution Users

Setting Up Financials

Entering Transactions, Budgets & Reports

Current and Month-End Processing & Closing

Accounting Manager Fundamentals

Accounts Receivable Fundamentals

Accounts Payable Fundamentals

Year-End Processing

Deep Dive Into Automatic Journals

Understanding Operating Budgets

Introduction to Fixed Assets

Working with Process Flows

Microsoft Office Integration

Advanced Financials

Expert Financials

Accounting Manager responsibilities include:

- Manages and overseeing daily operations of the accounting department.
- Monitors and analyzes accounting data and producing financial reports.
- Establishes and enforces proper accounting methods, policies and principles.

AP Specialist

Getting Started	Core	Additional	Advanced	Expert

Getting Started:
Introduction to Sage X3

Getting Started:
Common Data

Intro and Overview: Financial
and Distribution Users

AP Specialist: Setup

AP Specialist: Invoicing &
Payments

AP Fundamentals

Working with Process Flows

Microsoft Office Integration

Advanced Financials

Expert Financials

AP Specialist responsibilities include:

- Manages and overseeing daily bookkeeping and record keeping.
- Monitors and analyzing accounting data and producing financial reports.
- Preparation of tax records for financial audits.

AR Specialist

Getting Started	Core	Additional	Advanced	Expert

Getting Started
- Getting Started: Introduction to Sage X3
- Getting Started: Common Data

Core
- Intro and Overview: Financial and Distribution Users
- AR Specialist: Setup
- AR Specialist: Invoicing & Payments
- AR Fundamentals

Additional
- Working with Process Flows
- Microsoft Office Integration

Advanced
- Advanced Financials

Expert
- Expert Financials

AR Specialist responsibilities include:

- Securing revenue by verifying and posting receipts and resolving any discrepancies.
- Generating invoices and account statements.
- Assisting in general financial management and analysis.

Customer Service

Getting Started	Core	Additional

Getting Started:
Introduction to Sage X3

Getting Started:
Common Data

Intro and Overview: Financial
and Distribution Users

Managing After-Sales
Services

Managing Leads and
Prospects

Working with Process Flows

Microsoft Office Integration

Customer Service responsibilities include:

- Interact with customers via telephone, email, online chat, or in person to provide support an information on an assigned product or service.
- Ensure that appropriate actions are taken to resolve customers problems and concerns.
- Use product knowledge to answer inquiries or to forward to the appropriate staff.

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Developer

Getting Started	Core	Additional	Expert

Getting Started
- Getting Started: Introduction to Sage X3
- Getting Started: Common Data

Core
- Intro and Overview: Financial and Distribution Users
- Common Tools
- Development Basics
- Upgrade Tools

Additional
- Web Services and integration
- Advanced Common Tools
- Automated Test Platform

Expert
- Expert Developer

Developer responsibilities include:

- Collaborate with management, departments, and customers to identify end-user requirements and specifications.
- Produce efficient and elegant code based on requirements.
- Testing and evaluating new programs.

Manufacturing Specialist

Getting Started

- [Getting Started: Introduction to Sage X3](#)
- [Getting Started: Common Data](#)

Core

- [Introduction and Overview for Manufacturing Users](#)
- [Using the Solution – Manufacturing](#)
- [Manufacturing Specialist](#)

Additional

- [Manufacturing Configurator](#)
- [Non-conformance Management](#)
- [Introduction to Sage X3 Warehousing](#)
- [Using the Solution: Sage X3 Warehousing](#)
- [Working with Sage X3 and Web Scheduling](#)
- [New product Introduction: Product Design](#)
- [Working with Process Flows](#)
- [Microsoft Office Integration](#)

Advanced

- [Advanced Manufacturing](#)

Expert

- [Expert Manufacturing](#)

Manufacturing Specialist responsibilities include:

- Provide assistance to improve production procedures, processes, and controls.
- Conduct research and development of all manufacturing processes inclusive of production flow, assembly procedures and production equipment.
- Coordinate manufacturing launch of new and revised products inclusive of established goals, team members training and results evaluation.

Project and Job Cost Management Specialist

Getting Started	Core	Additional

Getting Started:
- Getting Started: Introduction to Sage X3
- Getting Started: Common Data

Core:
- Intro and Overview: Financial and Distribution Users
- Using the Solution – Project Management
- Project Management - Fundamentals

Additional:
- Working with Process Flows
- Microsoft Office Integration

Project and Job Cost Management Specialist responsibilities include:

- Assists the project managers and project engineers to ensure utilization of cost management best practices to achieve project objectives.
- Plans a budget and ensures cost-effective operations for a project or a company's overall business model.
- Design action plans to increase productivity, manage project costs, and keep projects on schedule for completion.

Purchasing Specialist

Getting Started

Getting Started: Introduction to Sage X3

Getting Started: Common Data

Core

Intro and Overview: Financial and Distribution Users

Overview and Setting up Purchasing

Receiving, Invoicing, Utilities and Reports

Ordering, MRP Calculation and Enterprise Planning

Purchasing Fundamentals

Additional

Purchasing Signature Management

Advanced Purchasing and Three-Way Matching

Using Automated Data Collection (ADC)

Working with Process Flows

Microsoft Office Integration

Advanced

Advanced Distribution

Expert

Expert Distribution

Purchasing Specialist responsibilities include:

- Conducting product research and sourcing new suppliers and vendors.
- Sourcing materials, goods, products, and services and negotiating the best or most cost-effective contracts and deals.
- Performing inventory inspections and reordering supplies and stock as necessary.

Reporting and Analytics: Sage Enterprise Intelligence

Getting Started	Core	Additional	Advanced

Getting Started:

Getting Started: Introduction to Sage X3

Getting Started: Common Data

Core:

Intro and Overview: Financial and Distribution Users

SEI – Getting Started with the Basics

SEI – Using the SEI Add In for Excel

SEI – Report Designer

SEI – Formatting, Filtering and Sorting

Additional:

Working with Process Flows

Microsoft Office Integration

Advanced:

Administration and Security

Reporting and Analytics applies to all roles and responsibilities include:

- Designing reports to track the performance of the business.
- Analyzing data to answer strategic questions about the business.

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Reporting and Analytics: Other

Getting Started	Core	Additional

Getting Started: Introduction to Sage X3	Intro and Overview: Financial and Distribution Users	Working with Process Flows
Getting Started: Common Data	Crystal Reports Basics	Microsoft Office Integration

Reporting and Analytics applies to all roles and responsibilities include:

- Designing reports to track the performance of the business.
- Analyzing data to answer strategic questions about the business.

Sales Specialist

Getting Started	Core	Additional	Advanced	Expert

Getting Started:
Getting Started: Introduction to Sage X3

Getting Started: Common Data

Core:
Intro and Overview: Financial and Distribution Users

Setting Up Sales and Pricing

Creating Quotes & Orders and Allocating Stock

Sales Invoicing and Returns

Shipment Preparation

Batch Sales Processing, Reports and Inquiries

Sales Fundamentals

Additional:
Sales Signature Management

Using Automated Data Collection (ADC)

Working with Process Flows

Microsoft Office Integration

Advanced:
Advanced Distribution

Expert:
Expert Distribution

Sales Specialist responsibilities include:

- Providing product demonstrations to staff and clients and taking the lead to resolving complaints.
- Analyzing sales team performance and scheduling training/refresher sessions accordingly.
- Providing accurate sales forecasts and allocating resources so targets are met.

Stock Specialist

Getting Started

- Getting Started: Introduction to Sage X3
- Getting Started: Common Data

Core

- Intro and Overview: Financial and Distribution Users
- Setting Up Stock
- Entering Transactions, Stock Counts, and Reordering
- Periodic Processing, Reports & Inquiries
- Stock Fundamentals

Additional

- Setting up Quality Control & Transactions
- Understanding and Using Warehouses
- Using Automated Data Collection (ADC)
- Working with Process Flows
- Microsoft Office Integration

Advanced

- Advanced Distribution

Expert

- Expert Distribution

Stock Specialist responsibilities include:

- Controlling flows of equipment and supplies.
- Developing loss mitigation processes and protocols.
- Reporting to management and advising on process improvements.

System Administrator

Getting Started

Getting Started: Introduction to Sage X3

Getting Started: Common Data

Core

Intro and Overview: Financial and Distribution Users

Common Tools

Security and System Administrator

Upgrade Tools

Additional

Understanding and Creating Workflows

Introduction to Requesters/Queries

Working with Process Flows

Microsoft Office Integration

Customizing Sage X3 Screens

Advanced

Advanced Common Tools

Advanced Technical

Automated Test Platform

System Administrator responsibilities include:

- Configuring and maintaining the networked computer system, including hardware, system software, and applications.
- Ensuring data is stored securely and backed up regularly.
- Diagnosing and resolving hardware, software, networking, and system issues when they arise.

Getting Started: Introduction to Sage X3

1.5 hours   **Basic, Plus, Premiere**

This learning package introduces 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.

All roles

Getting Started: Common Data

1 hour   **Basic, Plus, Premiere**

In this course you 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.

All roles

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

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Introduction and Overview: Financial and Distribution

10 hours   **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.

All roles

Introduction and Overview: Financial and Distribution

5 hours   **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.

All roles
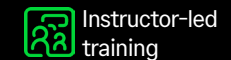
Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

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Accounting Manager Fundamentals

10 hours   **Basic, Plus, Premiere**

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.

After completing the course, you will be able to:
- Understand the organizational setup of your X3 folder.
- Define charts of accounts and dimensions.
- Enter journal entries and manage transaction flow in your folder.
- Inquire and report on financial information.
- Run period closings.

Accounting Manager

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.

Accounting Manager

Entering Transactions, Budgets & Reports

4 hours   **Basic, Plus, Premiere**

In this interactive eLearning course, you will learn how to post to the general ledger, set up and create journal entries, work with analytical allocations, create automatic and manual remittances, validate payment receipts and generate bank allocations, view bank and payment inquiries, learn about analytical budgets including understanding the analytical budget control flow and structure, enter budgets and create budget versions, view budget reports and inquiries, gain an understanding of intercompany transactions, how to set up intercompany transactions, and how to enter intercompany journals and invoices, and lastly you will learn the various methods of viewing your data; including Sage Enterprise Intelligence (SEI) and Financial Data Extraction (FDE).

Accounting Manager

Current and Month-End Processing and Closing

2 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.

Accounting Manager

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

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Year-End Processing

🖥️ **2 hours**   🔒 **Plus, Premiere**

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.

👤 **Accounting Manager**

Year-End Processing Course

👥 **2 hours**   🔒 **Plus, Premiere**

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.

After completing this 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.

👤 **Accounting Managers**

👥 Instructor-led training
🔒 Customer Learning Membership Level(s)
🖥️ eLearning
🏅 Badge available
👤 What role is this course for?
📦 Part of a Certification path

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Accounts Payable Fundamentals

8 hours   **Plus, Premiere**

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.

After completing this course, you will be able to:
- Establish AP parameters.
- Define business partners and suppliers.
- Enter purchases and miscellaneous invoices.
- Pay suppliers.
- Process employee expenses.
- Perform routine periodic processing.

Accounting Managers, Accounts Payable Specialists

AP Specialist: 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.

Accounting Manager, Accountants Payable Specialists

AP Specialist: Invoicing & Payments

2.5 hours   **Basic, Plus, Premiere**

In this interactive learning course, you will learn: 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; how to use the various functions for bank reconciliation; and how to track and process employee expenses.

Accounting Manager, Accounts Payable Specialists

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

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Accounts Receivable Fundamentals

10 hours · Badge available · **Plus, Premiere** · Part of a Certification path

This course will provide 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.

After completing this 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.

Accounting Managers, Accounts Receivables Specialists

AR Specialist: Setup

2.5 hours · Badge available · **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.

Accounting Manager, Accountants Receivables Specialists

AR Specialist: Invoicing & Payments

1.75 hours · Badge available · **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 payment

Accounting Manager, Accounts Receivables Specialists

Instructor-led training
Customer Learning Membership Level(s)
eLearning
Badge available
What role is this course for?
Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Managing After-Sales Services

5 hours **Plus, Premiere**

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.

After completing this 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.

Customer Service

Managing Leads and Prospects

5 hours **Basic, Plus, Premiere**

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.

After completing this 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.

Customer Service

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

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Overview and Setting Up Purchasing

📺 **20 hours**   🏅🔒   **Plus, Premiere**

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.

👤 **Purchasing Specialist**

Ordering, MRP Calculation and Enterprise Planning

📺 **1 hour**   🏅🔒   **Plus, Premiere**

In this interactive eLearning course, you will 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 Specialist**

Receiving, Invoicing, Utilities and Reports

📺 **2.25 hours**   🏅🔒   **Plus, Premiere**

In this interactive eLearning course, you will 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 inquires.

👤 **Purchasing Specialist**

👥 Instructor-led training

🔒 Customer Learning Membership Level(s)

📺 eLearning

🏅 Badge available

👤 What role is this course for?

🎓 Part of a Certification path

To register for courses and certifications visit www.sageu.com

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Purchasing Fundamentals

9 hours   **Plus, Premiere**

This session will provide 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 X3.

After attending this course, you will be able to:
- Work with common data settings.
- Define purchasing prices.
- Enter transactions to purchase products.
- Work with purchasing signature management.
- Report and inquire on buying and purchase information.

Purchasing Specialist

Setting Up Sales and Pricing

2.5 hours   **Basic, Plus, Premiere**

In this interactive eLearning course, you will 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 Patch Finder 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 Specialist

Sales Management Fundamentals

10 hours   **Plus, Premiere**

This course will provide 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.

After attending this course, you will be able to:
- Work with common data settings.
- Define price lists.
- Enter transactions to sell products.
- Work with sales signature management.
- .Report and inquire on sales information.

Sales Specialist

Instructor-led training

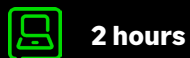Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Creating Quotes and Orders and Allocating Stock

🖥 **2 hours**   ✅ 🔒   **Basic, Plus, Premiere**

In this interactive eLearning course, you will learn about the various parameters used 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.

👤 **Sales Specialist**

Shipment Preparation

🖥 **45 minutes**   🔒   **Basic, Plus, Premiere**

In this eLearning course, you will learn about the Shipment preparation process in Sage X3. Shipment preparations represent the steps between Sales Orders and Sales Shipment, and all related actions. These functions are not mandatory in the Sales processes, but to understand how shipment preparation's function is a great additional asset in the sales distribution management.

👤 **Sales Specialist**

Sales Invoicing and Returns

🖥 **2.25 hours**   🔒   **Basic, Plus, Premiere**

In this interactive eLearning course, you will learn how to set up the parameters for credit control, control the credit limit of a customer, place a customer on hold or manually release, identify the different categories of invoices and how to use each category, how to set up the entry transactions used in the different invoicing functions, how to generate direct orders, delivery, and manual invoices, generate invoices for counter sales and pro forma invoices and how to print an invoice. Lastly, you will learn how to manage the return of goods from customers, create, view, and modify customer returns following a delivery or a supplier return in the case of inter-site or inter-company transfers and enter credit memos for a customer.

👤 **Sales Specialist**

Batch Sales Processing, Reports and Inquiries

🖥 **1 hour**   ✅ 🔒   **Basic, Plus, Premiere**

In this interactive eLearning course, you will 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.

👤 **Sales Specialist**
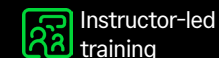
👥 Instructor-led training   🔒 Customer Learning Membership Level(s)

🖥 eLearning   ✅ Badge available

👤 What role is this course for?   🎓 Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Stock Fundamentals

9 hours | **Basic, Plus, Premiere**

This course will provide 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.

After attending this course, you will be able to:
- Establish products and define common data.
- Establish costing and valuation rules.
- Enter stock transactions.
- Process receiving and shipping transactions.
- Manage inventory costs.

Stock Specialist

Setting Up Stock

2.75 hours | **Basic, Plus, Premiere**

In this interactive eLearning course, you will 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.

Sales Specialist

Entering Transactions, Stock Counts, and Reordering

2.25 hours | **Basic, Plus, Premiere**

In this interactive eLearning course, you will 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.

Stock Specialist

Periodic Processing, Reports and Inquiries

30 minutes | **Basic, Plus, Premiere**

In this interactive eLearning course, you will 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.

Stock Specialist

Instructor-led training

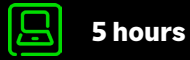Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

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 Specialists

Manufacturing Specialist

15 hours

Plus, Premiere

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.

After completing this course, you will be able to:
- Explain the manufacturing concepts and processes.
- Explain the buyer and planning concepts.
- Use the manufacturing planning tools.
- Set up and process manufacturing requirements.
- View the results of MRP/MPS and how to interpret the results.
- Generate work orders and perform allocations and scheduling.
- Understand the detailed scheduling and optimization features.
- Track the production process.
- View the work order status.
- Close or reactivate work orders.
- Perform mass updates, closures, and completions.
- View actual costs compared to planned costs.
- Determine production cost for a completed work order.
- Run reports and inquires.

Manufacturing Specialist
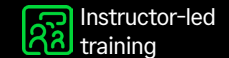
Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Using the Solution-Project Management

⌨ 1.5 hours   **🔒 Basic, Plus, Premiere**

In this interactive eLearning course, you will gain an understanding of the Project Management module and gain an understanding of how to create projects, manage project tasks and budgets, and enter time.

👤 Project Manager

Project Management - Fundamentals

👥 15 hours   **🔒 Plus, Premiere**

During this instructor-led 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.

After attending this course, you will:
- 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, the stock replenishment, and the analytical accounting.

👤 Project Manager

👥 Instructor-led training
🔒 Customer Learning Membership Level(s)
⌨ eLearning
🏅 Badge available
👤 What role is this course for?
📦 Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Common Tools

15 hours   **Plus, Premiere**

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

After completing the course, you will be able to:
- 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.

System Administrator and Developer roles

Security and System Administrator

13.5 hours   **Plus, Premiere**

Are you responsible for setting up and maintaining security in Sage X3? Do you manage the databases and performance of your system? Attend this online instructor-led virtual course to 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.

After attending this course, you will be able to:
- Explain how to set up user security and maintain users.
- Understand folder setup and management.
- Understand the patch integration process and tools.
- Describe the data import/export tools and capabilities.
- Understand how to configure and use the Batch Server to process tasks and requests.
- Demonstrate how to create and use Process flows.
- Demonstrate how to create and use Workflow rules and notifications.
- Understand the Microsoft Office integration and collaboration tools.
- Understand the Authoring functions and how to use them.

System Administrator

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Upgrade Tools

1 hour **Basic, Plus, Premiere**

This learning package provides you with interactive eLearning courses that provide information on Patch Finder and Test Update. You will learn how to use Patch Finder to search for details in bug fixes and enhancements, as well as Test Update to test Sage patches before they are applied.

Special Note: This course is automatically included, at no additional charge, when attending the X3 - Sage X3 - Bootcamp: Core Technical or X3 - Sage X3 -Development: Basics instructor-led training courses.

System Administrator and Developer roles

Development Basics

15 hours **Plus, Premiere**

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.

After attending this 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.

Developer creating customizations for their Sage X3 solution

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

SEI – Getting Started with the Basics

4.5 hours   **Plus, Premiere**

Attend this online instructor-led virtual course to learn about the Sage Enterprise Intelligence (SEI) reporting and analysis tool. This course provides a high-level overview and will help you quickly get started using the basic functions before moving on to more advanced features in SEI. Learn how to use built-in views and how to create and tailor views for your needs.

After attending this course, you will be able to:
- Navigate within the SEI interface.
- Understand what processes are and the different types of views available.
- Use pre-built views to create your own views.
- Add or remove dimensions and measures from views.
- Change columns in a view, add sorting of rows and summarized data.
- Apply simple and advanced filters.
- Use pivots and cross-tab worksheet views.
- Print and export views.

This course is recommended for all users wanting to start creating and viewing reports in SEI.

SEI – Using the SEI Addin for Excel

4.5 hours   **Plus, Premiere**

Attend this online instructor-led virtual course 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. You will learn how to use all the features on the SEI Addin for Excel toolbar and how to create formulas and pivot tables and how to filter and select subsets of data.

After attending this course, you will be able to:
- Create a reference configuration used for retrieving data between the Addin for Excel and SEI.
- Use all the addin features available on the Excel toolbar.
- Use and create SEI formulas.
- Pull data from SEI processes using pivot tables and cubes.
- Use prompts to filter and select specific subsets of data.
- Link to formulas and applications.

This course is recommended for all users wanting to start creating and viewing reports in SEI.
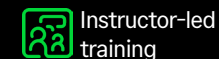
Instructor-led training

eLearning

What role is this course for?

Customer Learning Membership Level(s)

Badge available

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

SEI – Report Designer

3.75 hours   **Plus, Premiere**

Attend this online instructor-led virtual course to learn how to create and customize dynamic operational and financial reports using the Report Designer in Sage Enterprise Intelligence.

After attending this course, you will be able to:
- Understand and use the Report Designer and Worksheet Editor interfaces.
- Access existing reports and create new reports.
- Import SEI worksheets into reports.
- Customize reports to meet your company's needs using formatting and layout tools.
- Apply advanced filters to your data/reports.
- Add calculations and totals to reports.
- Share reports collaboratively by exporting, distribute, emailing, etc..
- Understand the publishing options.
- Use external links and refresh cube data.

All SEI Users

SEI – Formatting, Filtering and Sorting

3.5 hours   **Plus, Premiere**

Attend this online instructor-led virtual course 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.

After attending this course, you will be able to:
- Customize columns and fields in views.
- Create rules based on certain conditions to format the appearance of data in columns.
- Apply advanced filters to your data using comparison and logical operators.
- Use the Expression builder (using SQL commands) for creating filters.
- Create calculated columns on the fly.

System Administrators, Advanced Report Writers
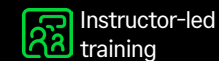
Instructor-led training

eLearning

What role is this course for?

Customer Learning Membership Level(s)

Badge available

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Designing Crystal Reports: Basics

10 hours **Plus, Premiere**

This Realtime class covers custom report design using Crystal Reports for X3. In this class you will learn how to design reports in Crystal Reports, and how to add reports to folders and run within X3.

After attending this course, you will be able to:
- Navigate Crystal Reports.
- Plan and create new reports.
- Add data tables and information from X3.
- Add new reports to X3.

All SEI Users

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

A Deep Dive Into Automatic Journals

4 hours　　**Plus, Premiere**

In this course, you will learn the structure of and how to configure and use Auto Journals. We'll discuss best practice tips for customizing to your needs, including using accounting codes. Also covered are the most commonly used auto journals that you may consider implementing for your organization.

After completing this course, you will be able to:
- Explain the purpose and use of Auto Journals.
- Understand the general flow of Auto Journals and how they work in the system.
- Understand the layout and elements of an Auto Journal.
- Demonstrate how to create and apply accounting codes with Auto Journals.
- Explain the most commonly used Auto Journals.
- Apply best practice guidelines to customize Auto Journals.

Accounting Manager

Understanding Operating Budgets

5 hours　　**Plus, Premiere**

In this course, you will learn 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.

After completing the course, you will be able to:
- Create a budget structure.
- Activate and approve the workflow.
- Manage by product, envelope, year, and lines.
- View inquiries and reports.

Accounting Manager

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Sage

Introduction to Fixed Assets

4 hours   **Plus, Premiere**

Attend this online instructor-led virtual course 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.

After completing the course, you will be able to:
- Understand the overall features and functions of Sage X3 Fixed Assets.
- Define setup information.
- Add and manage asset records.
- Enter expenses to capitalize and calculate depreciation entries.
- Perform periodic process tasks.
- View various inquiries and reports.

Accounting Manager

Working With Process Flows

45 minutes   **Plus, Premiere**

Process flows provide an easy way to access all the functions associated with a process such as order entry for an Order Entry clerk. This is a great feature to use for anyone who uses the same tasks daily.

In this interactive eLearning course, you will about process flows and process menus. This includes how to view existing process flows and menus, as well as design process flows and process menus to best meet your business needs.

All roles

Microsoft Office Integration

45 minutes   **Plus, Premiere**

Microsoft Office tools are the most used professional tools for reporting, data presentation, and document generation in a business. In this interactive course, you will learn how Sage X3 integrates with Microsoft Office so that you can start exporting Sage X3 data to Word, Excel, and PowerPoint. These documents can be circulated, reopened, and refreshed, as necessary.

All roles

Instructor-led training

eLearning

What role is this course for?

Customer Learning Membership Level(s)

Badge available

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Purchasing Signature Management

🖥️ **2 hours** 🎖️ 🔒 **Premiere**

When setting up the purchasing process, you can require signatures as part of the workflow process. The requirement of these signatures can prevent a purchase request from being converted to a purchase order and a purchase order from being printed.

In this interactive eLearning course, you will 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.

👤 **Purchasing Specialist**

Using Automated Data Collection (ADC)

🖥️ **4.5 hours** 🔒 **Plus, Premiere**

As part of this learning package, you will learn about the Sage X3 Automated Data Collection mobile application. Through the interactive eLearning courses, you will learn how to navigate and define settings, accessing, entering, and creating a purchase receipt, internal stock change, location reorder, miscellaneous receipt or issue, pick ticket, and how to access and use the various purchase inquiry options available.

👤 **Purchasing Specialist, Sales Specialist, Stock Specialist**

Advanced Purchasing and Three-Way Matching

🖥️ **1 hour** 🎖️ 🔒 **Premiere**

In this interactive eLearning course, you will learn about the management of advanced purchase techniques in the Purchasing module including the management of costs, which incorporates cost natures, percentage deductible in tax rates, and creating a list of costs with their values, and how to use Incoterm to define freight terms.

You will also 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.

👤 **Purchasing Specialist**

🖥️ Instructor-led training 🔒 Customer Learning Membership Level(s)

🖥️ eLearning 🎖️ Badge available

👤 What role is this course for? 📦 Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

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Sales Signature Management
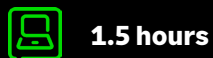
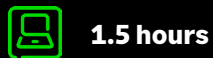🖥 **1.5 hours**   🔒 **Premiere**

When setting up Sales, you can require signatures as part of the workflow process. The requirement of these signatures can prevent a sales order from being converted to an invoice.

In this interactive eLearning course, you will 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.

👤 **Sales Specialist**

Setting Up Quality Control and Transactions

🖥 **1.5 hours**   🏅 🔒 **Basic, Plus, Premiere**

In this interactive eLearning course, you will 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.

👤 **Stock Specialist**

Understanding and Using Warehousing

🖥 **30 minutes**   🏅 🔒 **Basic, Plus, Premiere**

If you are using warehouses, it is important that you understand how they are used and set up in order to adequately track your stock.

In this interactive eLearning course, you will 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.
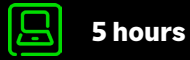
👤 **Stock Specialist**

👥 Instructor-led training
🔒 Customer Learning Membership Level(s)
🖥 eLearning
🏅 Badge available
👤 What role is this course for?
📦 Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

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.

👤 **Manufacturing Specialist**

New Product Introduction: Product Design

🖥 **1 hour**　　🔒 **Premiere**

In this interactive eLearning course, you will learn about the database developed for New product introduction (NPI), how design BOMs are created, and how the costs are calculated in real time. It explains how to use the function "New material" to amend the description, the costs and other information of the new material, the function "Publish product" to publish product design to inventory and the function "Publish BOM" to publish the design BOM to production BOM.

👤 **Manufacturing Specialist**

## Non-conformance Management

🖥 **5 hours**　　🔒 **Premiere**

In this interactive eLearning course, you will learn about Non-conformance (NC) in Sage X3. You will learn about the setup requirements focusing on the Activity Codes, User and General Parameters, Misc. Tables, Actions and User Rights.

You will also learn about the Non-conformance process starting with an Overview, then creating an NC from a document, the process from New to Close, linking documents from an existing NC, Report features, and Tracking Enhancements.

👤 **Manufacturing Specialist**
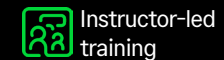
👥 Instructor-led training　　🔒 Customer Learning Membership Level(s)

🖥 eLearning　　🏅 Badge available

👤 What role is this course for?　　🎓 Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Introduction to Sage X3 Warehousing

⌨ **30 minutes**   🔒 **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.

👤 **Manufacturing Specialist**

Working with Sage X3 and Web Scheduling

⌨ **4.5 hours**   🔒 **Premiere**

Attend this course to learn how to use the Finite Scheduler to safely connect to Sage X3 and exchange work order scheduling data with Sage X3 Web Scheduling. You will also learn about the setup requirements, submitting work orders, scheduling and optimizing work orders, exporting production plans, and modifying scheduled work orders. Through guided simulations and hands-on exercises, you will have the opportunity to practice what you've learned in a training image.

👤 **Manufacturing Specialist**

Using the Solution: Sage X3 Warehousing

⌨ **2 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.

👤 **Manufacturing Specialist**

👥 Instructor-led training   🔒 Customer Learning Membership Level(s)

⌨ eLearning   🎖 Badge available

👤 What role is this course for?   🎓 Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Introduction to Requestors/Queries

10 hours **Premiere**

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.

By attending this course, you will learn:
- 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.

System Administrator

Customizing Sage X3 Screens

30 minutes **Basic, Plus, Premiere**

The ability to customize screens in Sage X3 can save you time as you can take control of your screen layout and have these changes apply to specific users or groups of users. In this interactive eLearning course, you will learn how to perform simple screen customizations such as hiding fields, rearranging sections, blocks, and fields on most screens, rearranging fields in inquiry screens, and adding columns to certain objects.

System Administrator

Understanding and Creating Workflows

7.5 hours

Wouldn't it be nice 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.

System Administrator

Instructor-led training

eLearning

What role is this course for?

Customer Learning Membership Level(s)

Badge available

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Advanced Common Tools

30 hours   **Premiere**

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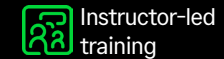
Developers wanting to expand their Sage X3 developer capabilities by utilizing web services to create integrations between Sage X3 and another application.

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 - Bootcamp: Technical Course or equivalent certification (Partner Consultants); or Common Tools (Partners and Customers).

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Advanced Financials

36 hours | **Premiere**

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.

All roles

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 - Bootcamp: Core Financials Course or equivalent certification (Partner Consultants).
- X3 – Sage X3 - Accounting Manager Fundamentals, X3 – Sage X3 - Accounts Payable Fundamentals, X3 – Sage X3 - Accounts Receivable Fundamentals or equivalent eLearning courses (Customers).

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Advanced Distribution

26.5 hours   **Premiere**

Are you a Distribution Implementation Consultant working on complex projects? Have you completed the Core Distribution training, or have been in the field for years and are ready to expand your knowledge to the next level? Attending this interactive advanced workshop is your next step to effectively work on projects with advanced stock, sales, and other logistic needs.

Important: In addition to the hands-on activities completed during the class, you will be required to complete hands-on activities as homework between sessions.

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.

Purchasing Specialist

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 - Bootcamp: Technical Course or equivalent certification (Partner Consultants); or Common Tools (Partners and Customers).
- X3 – Sage X3 - Bootcamp: Core Distribution Course or equivalent certification (Partner Consultants).
- X3 – Sage X3 - Purchasing Fundamentals, X3 – Sage X3 - Stock Fundamentals, and X3 – Sage X3 - Sales Fundamentals ore equivalent eLearning courses (Customers).

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Advanced Manufacturing

32.5 hours   🔒 **Premiere**

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.

Manufacturing Specialist

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 - Bootcamp: Core Distribution Course or equivalent certification (Partner Consultants).
- X3 – Sage X3 - Manufacturing Consultant Course or equivalent certification (Partner Consultants).
- X3 – Sage X3 - Purchasing Fundamentals, X3 – Sage X3 - Stock Fundamentals, and X3 – Sage X3 - Sales Fundamentals or equivalent eLearning courses (Customers).
- X3 – Sage X3 - Manufacturing Fundamentals User course (Customers).

Instructor-led training   Customer Learning Membership Level(s)

eLearning   Badge available

What role is this course for?   Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Advanced Technical

22.5 hours **Premiere**

Have you completed the Core Technical training, or have been in the field for years and are ready to expand your knowledge to the next level? Have you attended the core technical training classes and are ready to dig deeper into more technical concepts? Attending this interactive advanced workshop is your next step to learning how to offer additional services that will provide your customers with a more personalized and optimized system that will allow them to use their solution efficiently and the way they work. This course is offered as part of the Mastering Sage X3 Bootcamp program.

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.

Technical Administrators

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 - Bootcamp: Core Technical course or equivalent certification (Partner Consultants).
- X3 - Sage X3 - Common Tools (Partners & Customers) course.
- X3 - Sage X3 - Security and Administrator course.

Instructor-led training
Customer Learning Membership Level(s)
eLearning
Badge available
What role is this course for?
Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Introduction to Sage X3 Automated Test Platform

15 minutes

Premiere

Sage X3 Automated Test Platform, or ATP, is a tool to help you test various scenarios against Sage X3 updates. For example, as a developer you could test your customizations against an update to validate or determine if there are any issues that must be addressed prior to updating Sage X3. In this interactive eLearning course, you will learn about what ATP is and how it is used, the prerequisites to prepare your solution for installation of ATP and reports available in ATP.

System Administrator

Special Note:

This course is also included in the X3 – Upgrade Tools learning package.

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit www.sageu.com

Installing and Configuring Sage X3 Automated Test Platform

30 minutes

Premiere

This eLearning course provides you with information on how to install and configure the Sage X3 Automated Test Platform on your client workstation. You will also learn how to configure your Sage X3 test folder to work with the Sage X3 Automated Test Platform tools.

System Administrator

Special Note:

This course will be automatically included, at no additional charge, when attending the X3 - Sage X3 - Automated Test Platform: Writing Test Scripts for Sage X3 instructor-led training course.

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Automatic Test Platform: Writing Test Scripts

11.5 hours

Premiere

Attend this hands-on instructor-led training course to understand how to setup your Sage X3 environment to work with Sage X3 Automated Test Platform and setup your client environment to write Sage X3 Automated Test Platform scripts in Microsoft Visual Studio Code. You will also learn the basics of structuring Sage X3 Automated Test Platform step definitions to work with the various graphical elements of Sage X3 to write basic to intermediate testing scenarios. Additionally, during this course, the hands-on labs will provide experience writing a complete Sage X3 Automated Test Platform step definition to enhance your learning.

System Administrator

Special Note:

- Pre-work is required: Completing the X3-Sage X3-Installation & Configuring the Sage X3 Automated Test Platform eLearning course must be completed before attending day 1 of this class.
- All pre-work will be automatically included with course registration.

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Web Services and Integration

11 hours   **Premiere**

This course will teach you 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, as well as the best practices and limitations for implementing web services. Learn how to set up connection pools for managing waiting queues for web service requests. Also learn how to publish subprograms and objects in order to make them accessible to external applications through the Internet. You will gain an understanding of how to define a project team for developing the integration including estimating workloads, third party application development, unit testing, and final development. You will also learn the tips and best practices for testing and troubleshooting the integration.

After completing this course, you will:
- Understand what web services are and how to link them to an X3 solution.
- Understand the web services architecture and how the web server publishes web services and processes a request.
- Understand best practices and limitations of implementing web services.
- Set up web services in the Sage X3 management console.
- Set up a web service connection pool and understand the parameters.
- Publish subprograms and objects, such as sales orders, customer lists, and products.
- Test web services after they are published, including load testing.
- Integrate web services between Sage X3 and your application.

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

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:

- 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.

Instructor-led training   Customer Learning Membership Level(s)

eLearning   Badge available

What role is this course for?   Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

SEI – Advanced Administration and Security

5 hours   **Premiere**

Attend this online instructor-led virtual course 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.

After attending this course, you will be able to:
- Use the Administration functions to set security levels and create a new security level.
- Assign security groups to a user.
- Understand all the settings in the Process designer that are used to create processes.
- Set up and send subscribed distribution reports using the Distribution Scheduler.

Technical Administrators

Prerequisites

- Sage Enterprise Intelligence: Getting Started.
- Sage SQL Fundamentals or working knowledge of SQL.
- Working knowledge of multi-schema databases, table structures, and primary keys.

Instructor-led training

Customer Learning Membership Level(s)

eLearning

Badge available

What role is this course for?

Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Expert Workshop Courses

 Times vary by course   **Premiere**

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

For example, workshops address complex implementations and configurations in Development, Technical, Financial, Distribution, and Manufacturing. Individual topics vary, refer to SageU to see the current schedule and offerings.

 Certified consultants with field experience who support customers with advanced and complex configurations.

Prerequisites

Based on workshop offered; domain-specific certification and advanced training.

 Instructor-led training   Customer Learning Membership Level(s)

 eLearning   Badge available

 What role is this course for?   Part of a Certification path

To register for courses and certifications visit **www.sageu.com**

Create your Sage University profile

First create your Sage Account

To create a Sage University profile, you will need to log on to your **Sage account**. If you don't already have a Sage account, you can create one using the "Create account" link found on the bottom of the on the **log in** page.

You will need access to your email to retrieve a validation code to create your Sage account.

You can **view the FAQs** about your Sage account login to learn more.

Next create your Sage University Profile

Once you've logged on to your Sage account, complete the Sage University **profile creation form** and get started.

Please note that creating a Sage University profile is a one-time task. Once complete, you will simply log on to access Sage University.

Now you can log on to Sage University

Visit **Sage University** to log on or to choose your Country/Region.

Search the pages by Role or by topic and register for training courses.

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

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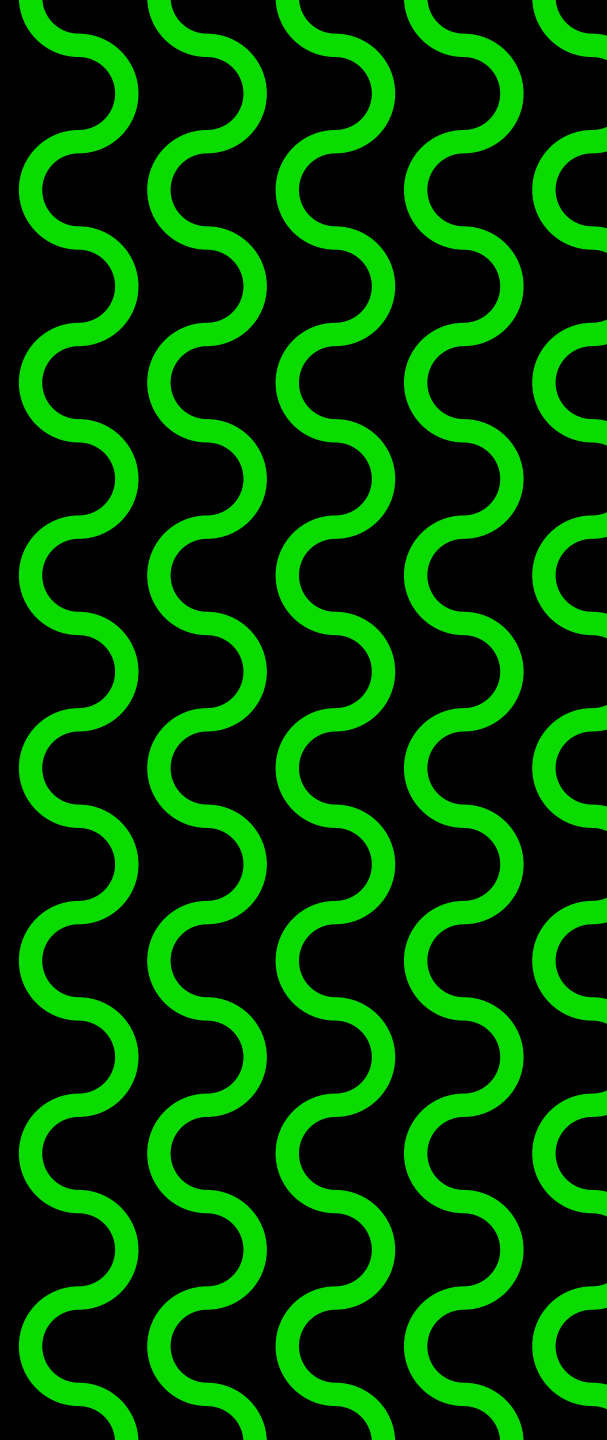
About Sage

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

Like many of the businesses we serve, Sage began as a small business and has grown beyond what seemed imaginable. Today, over 11,000 colleagues support millions of entrepreneurs across more than 20 countries as they power the global economy.

We help drive today's business builders with a new generation of solutions to manage everything from money to people.

Our social and mobile technology provides live information so you can make fast, informed decisions anytime, anywhere in the world. We support our business builders for life by offering choice, support, expertise, and innovation. We champion your causes and provide world-leading advice and support when you need it most.

For more information, visit **www.sage.com**

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