# Release Guide

## Sage X3
## Product Update 9

**Sage X3 Product Management**
February 2016
Revision 1.2

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# 1.0 Overview

## 1.1 Release Objectives

The main objectives of the product update 9 are:

- Becoming more competitive by addressing key gaps for manufacturing and distribution industries and disrupting with cloud commercially with pricing and choice.
- Improve mobile experience

## 1.2 Target market and positioning evolutions

| New or extended addressable market segments | Benefit |
|---|---|
| Manufacturing of electronic devices | Manage all the changes and the different version of your products |
| Certified industries | Change Control Management are done without external solution |
| Distribution ( in adition of eCommerce and BI) | « Move to an integrated digital world » |

# 2.0 Compliance

## 2.1 Bank file management

### 2.1.1 SEPA regulation: BIC optional in 2016

SEPA regulation identified bank accounts by 2 Ids: IBAN (International bank account number) and BIC (Bank identifier code). BIC is no longer mandatory for domestic SEPA transactions since 2014, except derogations. This rule is extended to all (cross-border) SEPA transactions within the European Community in 2016. According the recommendations of a large community of experts and banks, BIC is still mandatory for SEPA transactions up to 2016.

It is now possible to setup contexts where BIC is optional (at the company level). Depending on the context, controls related to the BIC are discarded (mandates and the payment transactions) and XML bank file structure is adjusted. Amendments are now triggered by the change of the IBAN, after user approval.

This improvement meets new SEPA rules, while providing the mandatory flexibility.

### 2.1.2 ISO 20022 – XML bank file generation

Sage, partners and customers are now able to define XML bank files for Direct Debit or Credit Transfer when required by banks.

Regulations and banks have adopted XML language as a standard for electronic exchanges between banks and companies/consumers based on the ISO 20022 standard. The first adoption was to support the European SEPA regulation for €-payment that uses this norm with specific rules. Prior to 9.0, XML bank format in Sage X3 was linked only possibly following SEPA regulation and included related controls so that it was not possible to describe variable (XML) bank files without applying all SEPA rules like Eurocurrency only.

This improvement disconnects the ability to generate XML bank files (direct debit/credit transfer) from the pure SEPA context.

## 2.2 Tax declarations

This feature allows for relevant tax declaration process to be activated depending on the legislation.

When setting up a country, it is now possible to activate the relevant legislation only, with the associated specific tax process. If this specific process is not required for the country, it is now possible to activate a default one, not linked to a legislation.

A new generic declaration process is now delivered, independent from any legislation so that it can be activated for all countries that don’t need a specific one, without requiring additional legislations.

# 3.0 Local compliance

## 3.1 Belgium

### 3.1.1 VAT chargeable on receipt of prepayment

This feature improves the Belgium tax declaration process so that tax on prepayments is calculated and declared according the Belgium legal and fiscal requirements.

Belgium authorities changed the start of the tax due date: good or service receipt, or payment collection (if payment happens before the receipt). Prepayments are typical cases where payment happened before receipt.

## 3.2 Switzerland

### 3.2.1 Swiss payment life cycle & BID management

Update 9 is a first step in the progressive integration into the core of the local Swiss add-on functions and modules. This first step focusses on the Swiss payment life cycle and bank ID management.

### 3.2.2 Postal codes / Zip codes import template

The new import template is delivered so that Swiss customers can update easily postal codes.

### 3.2.3 Swiss bank sort code import

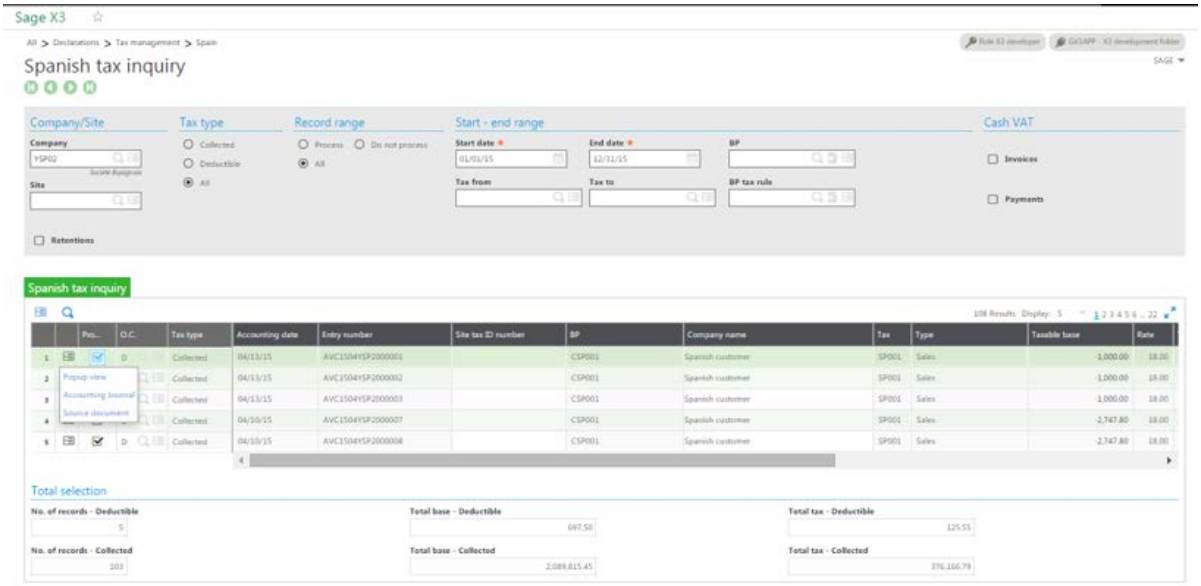
The data structure of Swiss clearing numbers in Sage X3 has been changed. A new import template is delivered.

## 3.3 Spain

### 3.3.1 Tax management improvement

Some Spanish tax declarations require additional information: date and identification number of original invoice as part of the credit note.

This additional information is now managed in the Spanish tax declaration process. Values are defaulted from the credit note during the extraction, or can be entered by the user if the credit note is not linked to an invoice.




## 3.4 Portugal

### 3.4.1 Inventory communication

Since 2015, companies operating in Portugal must declare their stocks using an XML file. This new function automates the generation of this file.

### 3.4.2 Sales return communication

All the products shipped by any company, regardless the reason why they are being shipped, need to be digitally signed and communicated to the government in advance in order to have an authorization code to proceed with transport.

This feature was available for Sales deliveries and is now extended to Sales returns, when they are managed by the vendor.

### 3.4.3 Invoice cancellation

Portuguese authorities admitted a simple “Invoice cancellation” mechanism that is now available with Product Update 9: A new document type typified as “Invoice cancelation” is created. When posting this document, the linked invoice is reversed, matched with this new document and marked as Canceled.

This invoice cancellation avoids the creation of a credit note and the consequent tax regularization.

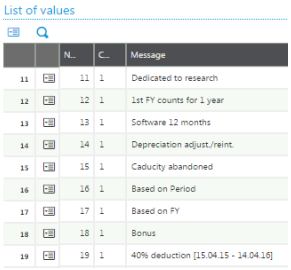
## 3.5 France

### 3.5.1 Tax assistance for investment 40% – ‘Loi Macron’

In order to encourage investments, French authorities grant tax assistance for investments to companies. This applies on specifics investments, the basis is 40% of the investment, split linearly on its (fiscal) depreciation duration. This tax assistance is a non-accounting information, without any impacts on the ‘normal’ depreciation and accounting rules.

This feature enables users to benefit from this tax assistance while automating the process. Tax assistance for investment is added as special depreciation rule and triggers calculation and storage of the result.

Specific depreciation rules are stored in Local Menu 3168.


List of values

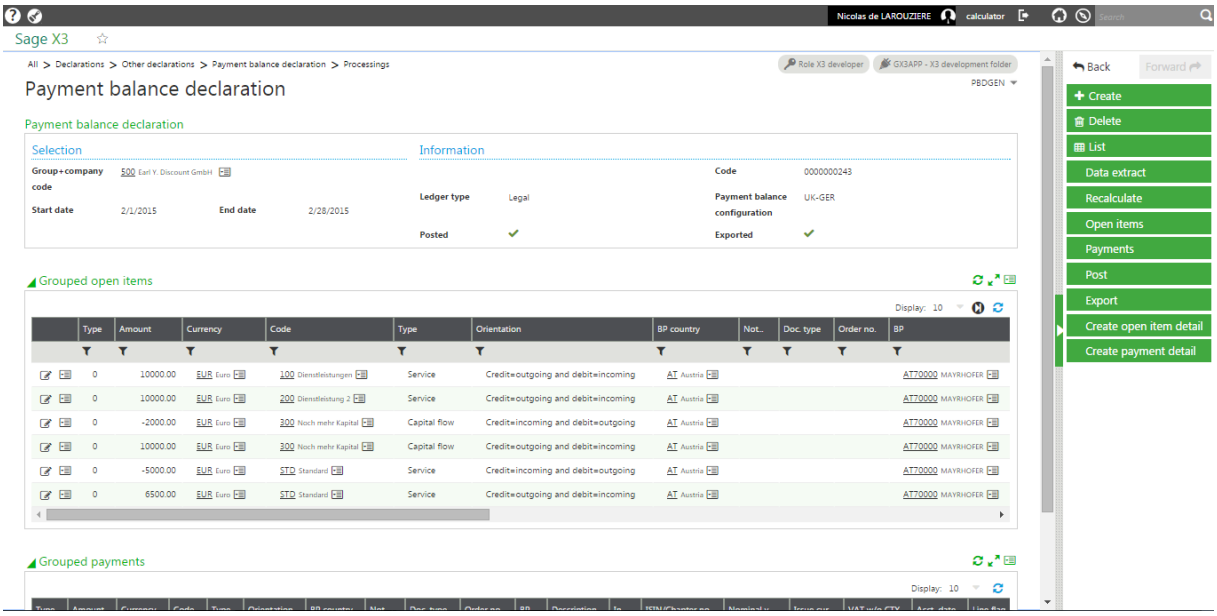
| | | N.. | C.. | Message |
|---|---|---|---|---|
| 11 | | 11 | 1 | Dedicated to research |
| 12 | | 12 | 1 | 1st FY counts for 1 year |
| 13 | | 13 | 1 | Software 12 months |
| 14 | | 14 | 1 | Depreciation adjust./reint. |
| 15 | | 15 | 1 | Caducity abandoned |
| 16 | | 16 | 1 | Based on Period |
| 17 | | 17 | 1 | Based on FY |
| 18 | | 18 | 1 | Bonus |
| 19 | | 19 | 1 | 40% deduction [15.04.15 - 14.04.16] |

# 4.0 Finance Improvements

## 4.1 Payment balance declaration

This feature adds the ability to create user-defined extraction rules, including selection criteria of events, grouping criteria and content.

Most European countries require companies to prepare periodic statistical declarations on non-resident payments and/or receivables/liabilities. When processing a payment balance declaration, a proposal is extracted according the rules. Users can easily review the result and take actions (re-process the entire extraction or adjust unitary records in create or update mode). The proposal is then validated and a file is generated.



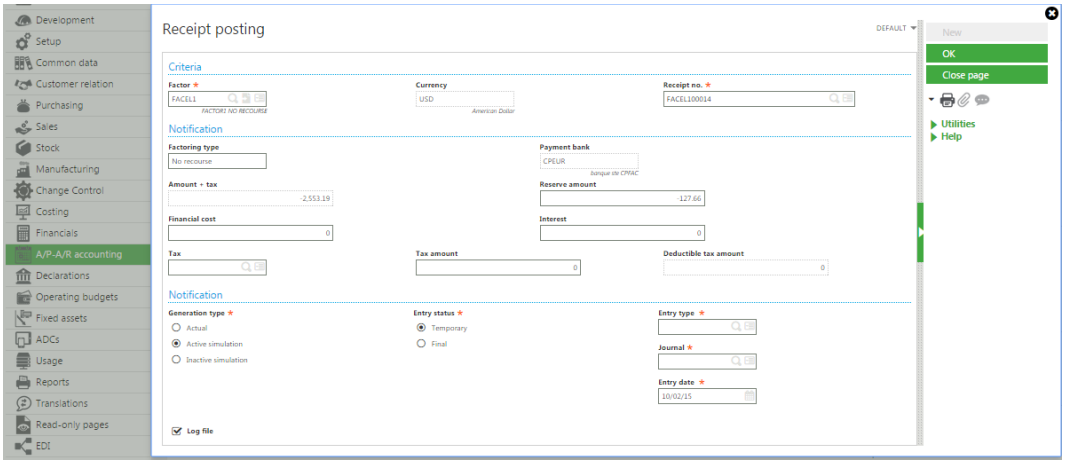

Ready-to-use settings are delivered for Germany (ZABIL, quarterly declaration), Austria (Z4-Statement, monthly declaration) and Portugal (COPE, monthly declaration). Users can define additional declarations with minimal effort.

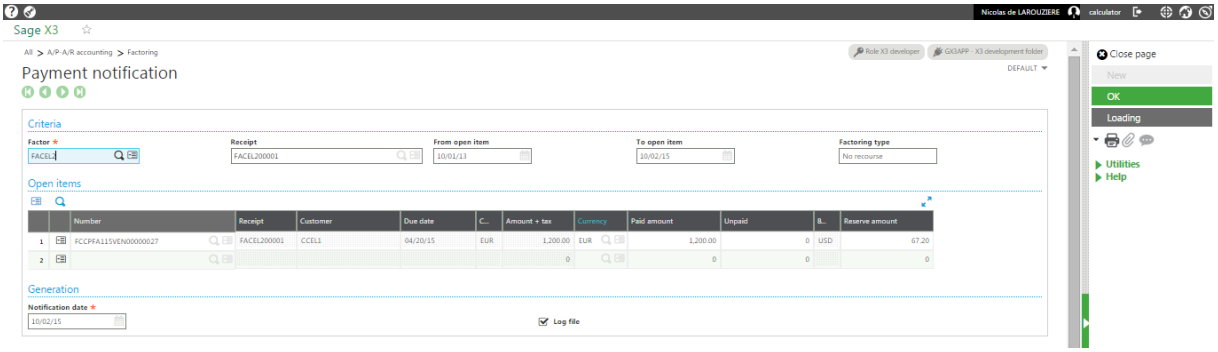
## 4.2 Factoring

Factoring is a way for companies to outsource payment collections from customers. There are two types of contracts: Recourse factoring where the company keeps the risk through equal delegation of the cash collection process and no recourse factoring where the factor company assumes the financial risk based on assignment.

Factors are associated to a type of contract: Recourse, no Recourse – and contractual % reserve, or standard (former behavior).

Factor is associated to invoices. The type of contract triggers business rules: control of the financial risk, costs and posting rules for receipts and payment notifications.




This feature automates a large part of the end-to-end factoring process for more flexibility, ease of use and accuracy.

## 4.3 Miscellaneous improvements

### 4.3.1 Purge / Archive folder migration

The upgrade process for archive folders is now available. Customers that implemented archive folders in previous releases of Sage X3 are now able to upgrade the archived folders to make them accessible from a single solution.

### 4.3.2 Account description in account totalization

Standard report related to journals (JOUGRP) now displays account descriptions in the account totalization section, for a better usability.

### 4.3.3 Improving file or directory selection

Standardization of actions enables users to manage files and directories in Finance processes for a better user experience.

### 4.3.4 Ledger generation tool

The standard tool enabling customers adding a new ledger has been improved for more flexibility.

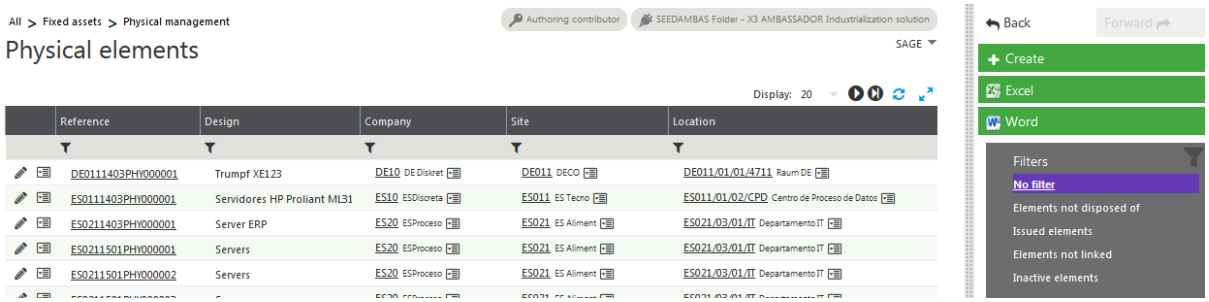
# 5.0 Fixed Assets improvements

## 5.1 Mobile app

A new mobile application is available for tracking physical assets for more information, go to the section on Mobility.

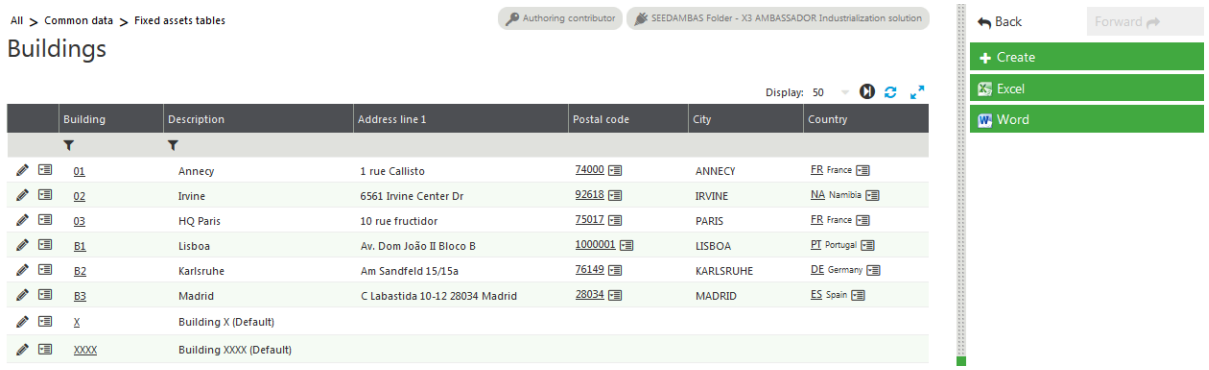
## 5.2 Physical assets

Physical assets management has also been modernized with a new design to better support access anytime, anywhere.




## 5.3 Buildings

The Miscellaneous table 604 - Building has been removed and replaced by a function « Buildings » in Common data.




In creation mode, the mandatory fields are building code and description. Geolocation can be entered as address or coordinates. In display mode, a Google map is displayed and a picture is also available (if uploaded at creation or update)

## 5.4 Locations

Locations function has also been updated. The geolocation for the location will be defaulted the location of the building, but this can be modified.

# 6.0 Distribution improvements

## 6.1 Sales quote types & sales order generation

New document types for sales quotes with their own rules (e.g. Document counter, type of process). Ability to ensure consistency between document types across the Sales processes.

Document types for each sales quote as it's already the case for orders, deliveries, returns and invoices. This gives the ability to define particular sequence number for each type. Links between sales quotes and sales orders to organize functional processes. A sales order type can be defined for a quote type.

## 6.2 Credit level control & price control in inter-site transactions

This improvement allows the ability to deactivate credit level control and null price control in an inter-site context on sales documents (Sales orders, invoices, & deliveries).

## 6.3 Credit level message in deliveries

This improvement concerns the sales orders picking on a delivery.
When a customer is submitted to credit level control and if the credit level is higher than the amount allowed, the message 'XXX Authorized credit level reached' was returned for each line picked. This is no longer the case. Now the message is only returned for the first picked line only. This situation can occur only if the user is allowed to create deliveries for a customer credit controlled that has reached their credit level.

## 6.4 Control on invoicing elements (distribution tax rules)

A new warning control on invoicing elements is applied when a sales document is created, updated or duplicated.

This control concerns invoicing elements with tax rule 'Distribution'. When an invoicing element has this rule, some other invoicing elements are linked to it with the 'Split of' field that contains the invoicing element number. When an invoicing element with tax rule 'Distribution' is used on a sales document, its value is distributed on the others invoicing elements depending on their tax code and the tax codes used on the sales document lines.

## 6.5 Tax control on sales documents

Ability to ensure consistency between document types across the Sales process. In the case of multi-legislation or complex tax rule management this feature allows the ability to prevent incorrect set up by checking that all tax codes have been identified on a sales document.

## 6.6 Inter-site sales order prices

With this improvement, users are able to choose the way to initialize prices on an inter-site sales order. Until now prices on an inter-site sales order are systematically calculated with sales prices determination process. This improvement on inter-site sales order allows to define if prices on lines come from purchase order lines or sale price lists.

The price transfer from purchase orders to sales orders applies only if the purchase order price structure is included in the sales order price structure.

Inter-sites open sales orders (contracts) are not managed with this behavior.

## 6.7 Intrastat and subcontracting

The users are able to setup movement rules & natures to declare subcontracting flows. These flows concern subcontracting material exchanges in an inter-company situation or with a supplier.

To support these flows, new movement rules & natures are available and the extraction process has been updated to take them in account.

For subcontracting intrastat declaration, users are able to declare the following exchanges:

- Subcontracting receipt
- Delivery for subcontract
- Subcontracting material return
- Receipt for subcontract
- Subcontract delivery
- Subcontract end product supplier return
- Material for subcontract supplier return
- Subcontract end product customer return

## 6.8 Manual Order Hold

Manual order hold allows a user to easily place an entire order on hold.
Placing an order on hold allows a user to create an order, but blocks it from processing. The ability to hold or release a hold within order entry is provided by a lock/unlock icon button within the sales order function.

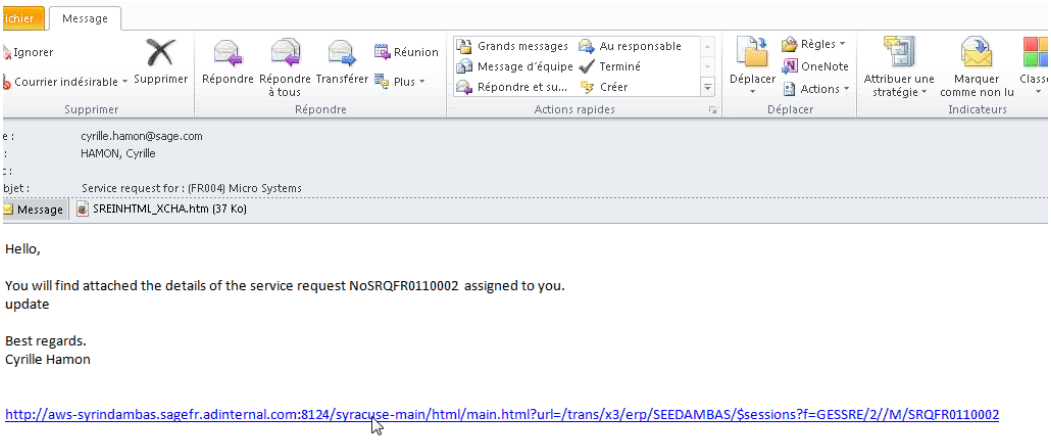
The order hold logic includes a control by hold code allowing you to determine if an order is blocked from allocation or de-allocated when held. This setting allows the order to be processed based on the hold reason and your business needs.

# 7.0 Customer Service improvements

## 7.1 Email management in helpdesk

This improvement allows users to send an email from the Service requests or the Service responses functions.

A new button ‘Send email’ is available on the right list on the menu Functions.



# 8.0 Logistics and Purchase improvements

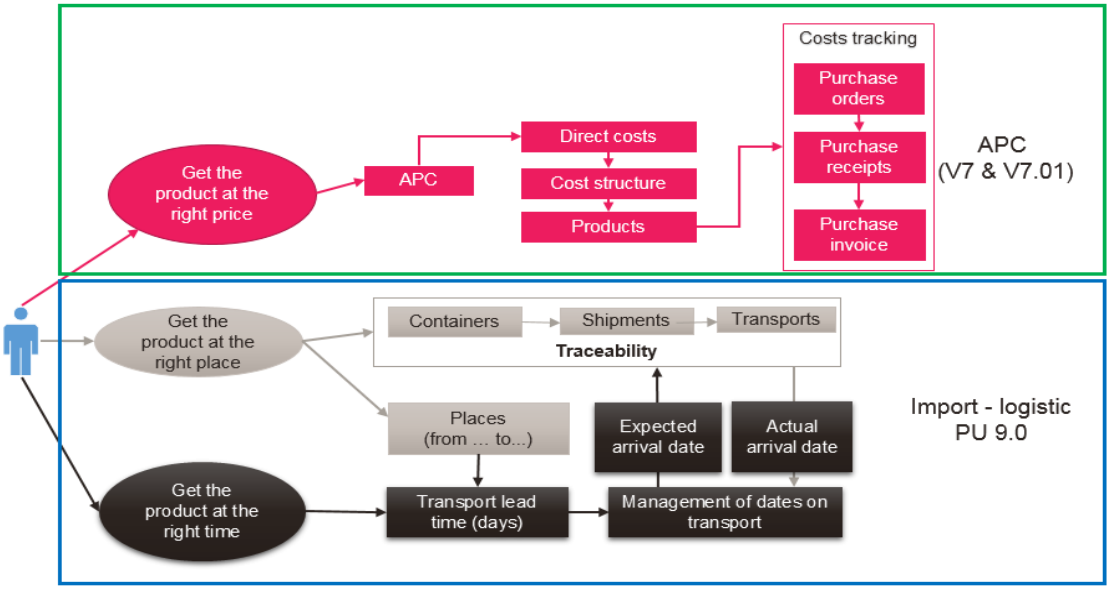
## 8.1 Logistics

New features provide the ability to management the transportation of goods in the purchasing process. The management of transportation gives visibility to the quantities receivable, track the goods transportation and the actual arrival date of the goods.

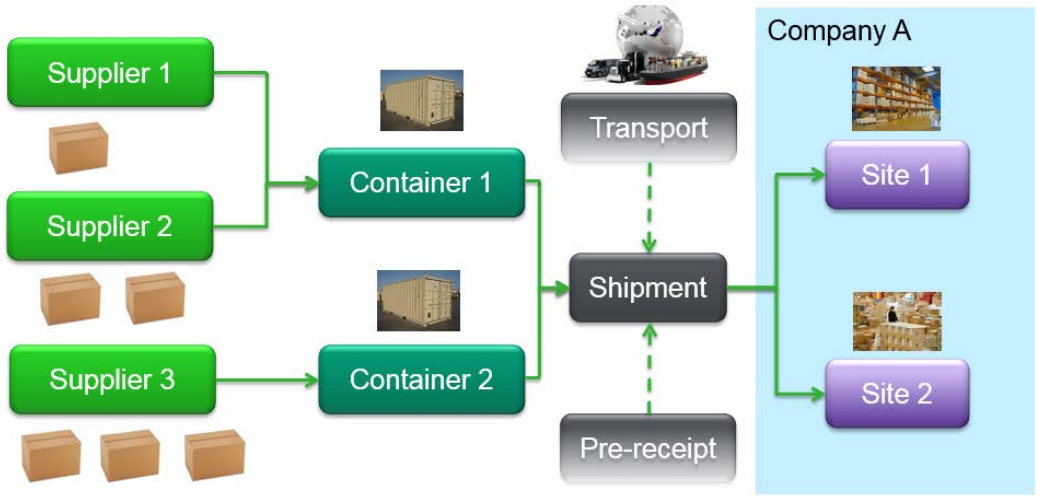
These features bring the following enhancements:

- Tracking goods during the transport between suppliers and buyers
- Anticipate the quantities before receipt
- Anticipate the expected arrival date across multiple purchase orders
- To rearrange the schedule of customer orders or production orders in the quantities and expected date of receptions
- Create new purchase orders
- MRP takes into account the quantities and expected date during transportation

The following diagram helps explain how it is compared to Advanced Purchase Cost feature introduced with version 7. They are different features that are not working together in this release.

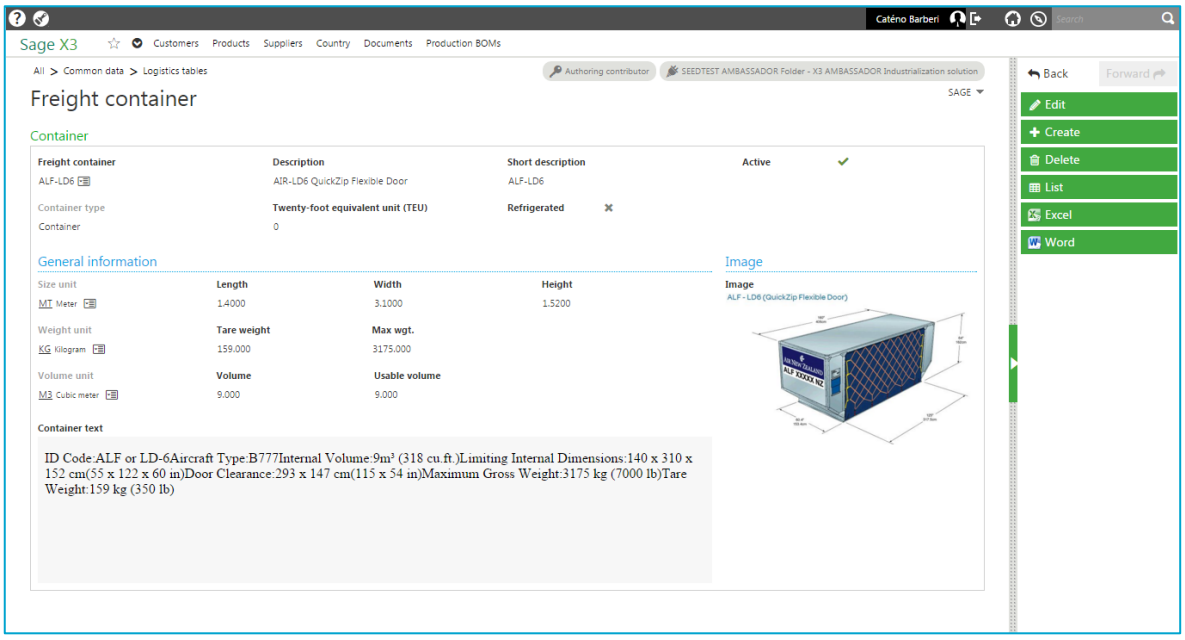


## Example Flow



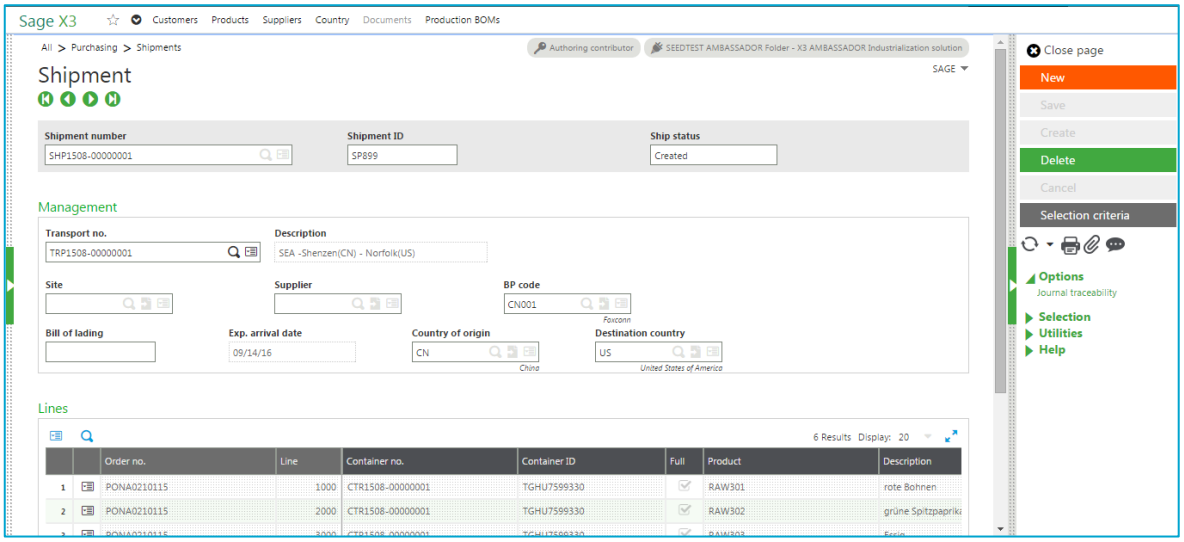

## Containers

Containers aim to hold the goods during the transportation.  Sage X3 gives visibility to the list of goods in the container, quantities, seal numbers, control of maximum weight, and volume in order to optimize the purchase.  There is now the ability to mix different goods from different purchase orders, different suppliers, sites and incoterms in the same container.



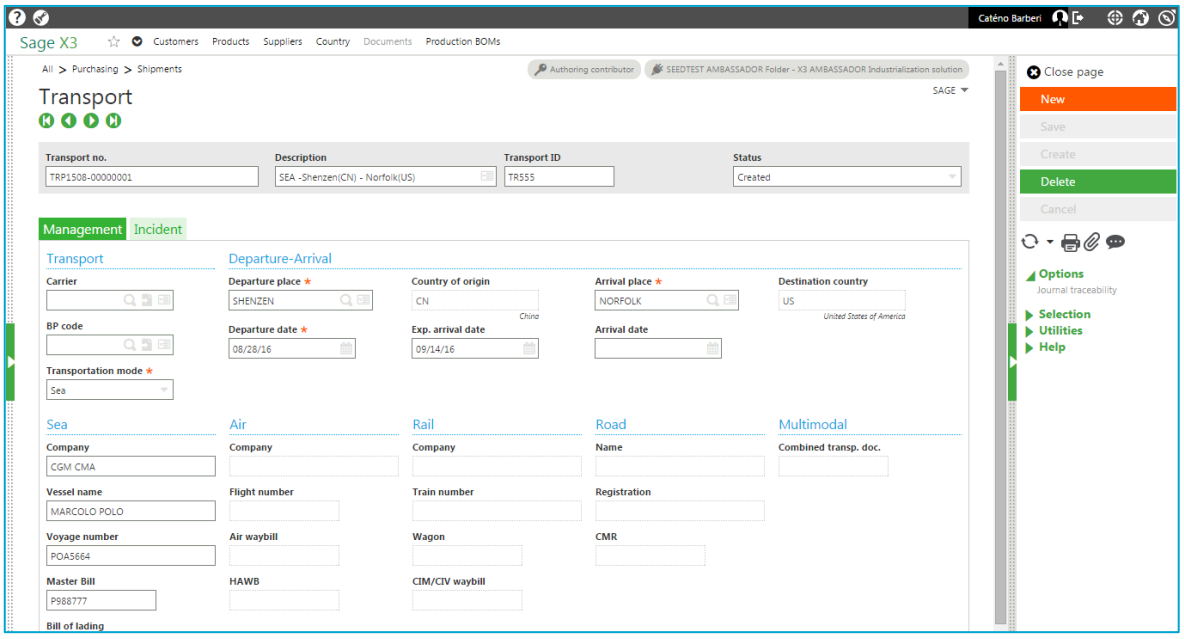

## Shipments

The shipment is the document that maintains the list of containers and their contents. It provides a list of the products in the containers and the quantities.
The shipment can be used without containers in the case of bulk management such as sand, petrol or gas.  Additional fields are tracked for logistic purposes - country of origin, destination country and expected arrival date.




## Transport

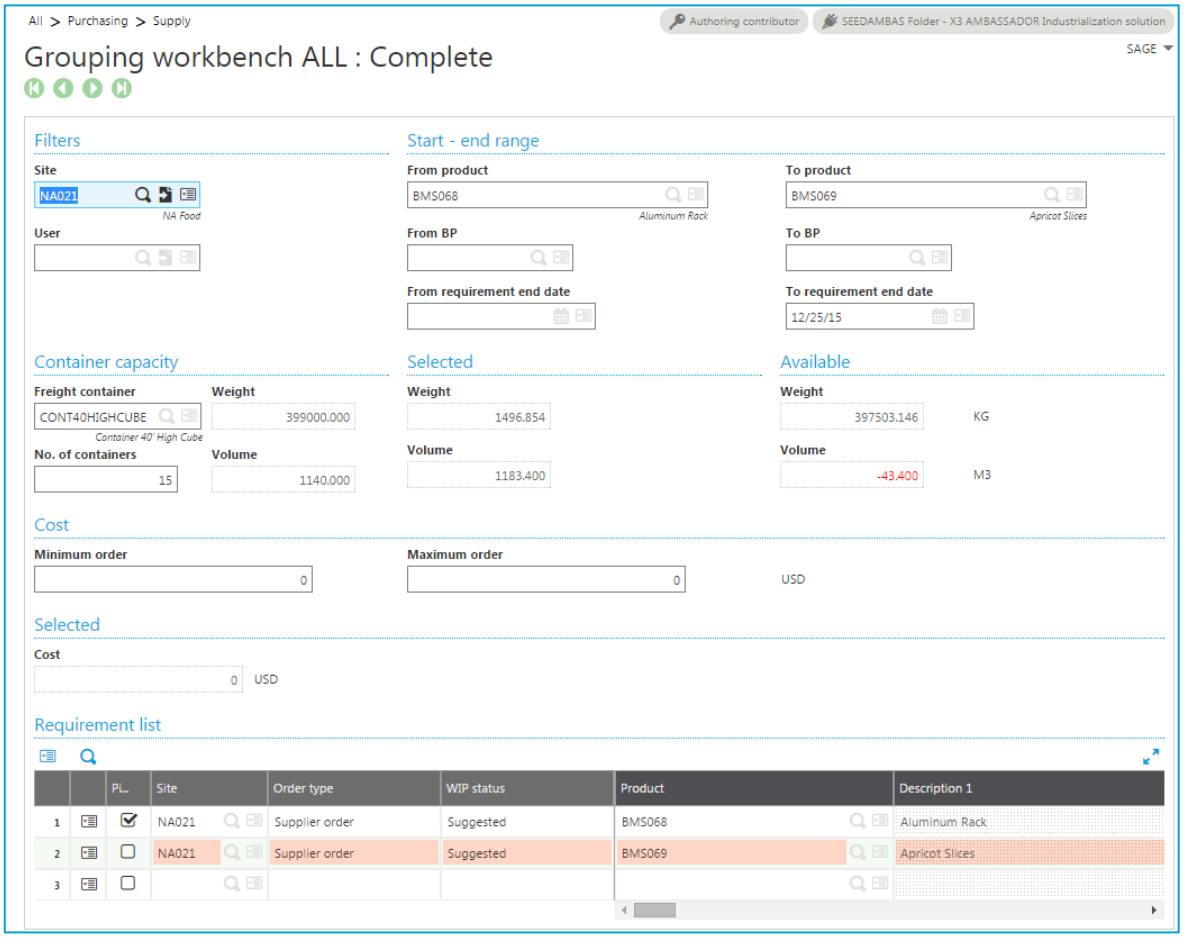
The transport feature provides the ability to track the different steps during transportation. Taking into account several transportation modes (Air, Sea, Road, Rail, Multimodal) and the ticket number depending the transport document as such Bill of Lading, CMR, HAWB, CIM/CIV. This function indicates the departure and arrival place, departure date, expected arrival date, actual arrival date and delays.




## 8.2 Purchase planning logistics

This new planning feature enhances the buyer's ability to make the most efficient choices for purchasing from suppliers from long distances. This new planning workbench allows a buyer to maximize their shipments from a supplier to reduce transportation costs, identify other products and suggestions for the supplier, and view trends to order based on history in product usage. It can help users to get the most of out of their freight costs by ordering based on container capacity.

From this new workbench, the buyer can use container selection to identify the weight and volume capacity of a container. Then they can compare selected lines with available capacity. The user can manually enter weight and volumes when needed. Now purchasing can be based on order costs for full containers. A buy has visibility of how much extra capacity is available and can decide to order additional items to take advantage of free freight. The workbench provides visibility of the minimum or maximum order amounts so that buys can comply with supplier setup.



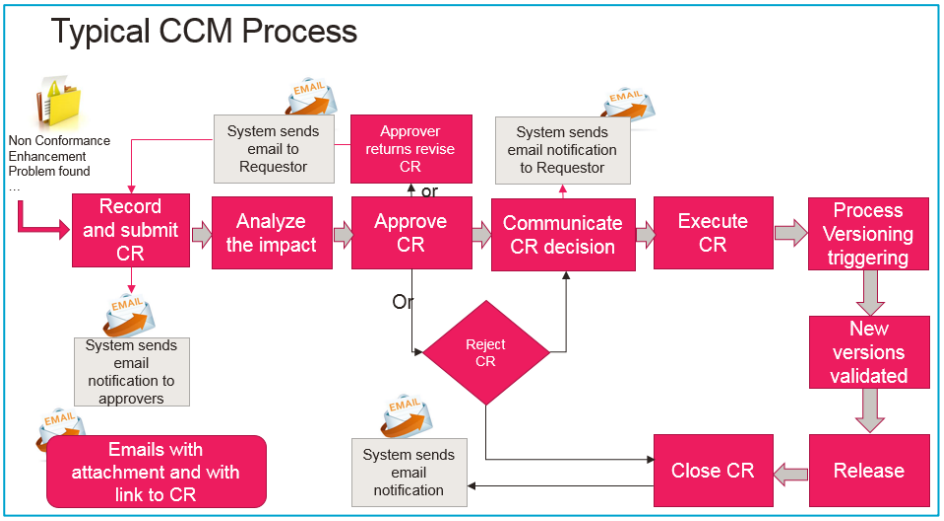
# 9.0 Manufacturing improvements

## 9.1 Change control management

Change Control Management (CCM) is a frame-work which supports the management of product design, release and changes within a controlled and audited environment. It is an important part of the key business process such as manufacturing or project management. It provides a systematic approach to managing all changes made to a product or system and the system enables user to enter a change, review the potential impact and send for approval.

CCM in Sage X3 is managed in six steps:

1. Create/maintain the Change Request (CR)
2. Review (Carry out an impact analysis that provides views on the main transactions such as the stock, sales orders, sales quotes, purchase orders, work orders, BOMs)
3. Plan the changes (Actions)
4. Implement the planned actions
5. Complete the CR
6. Close the CR



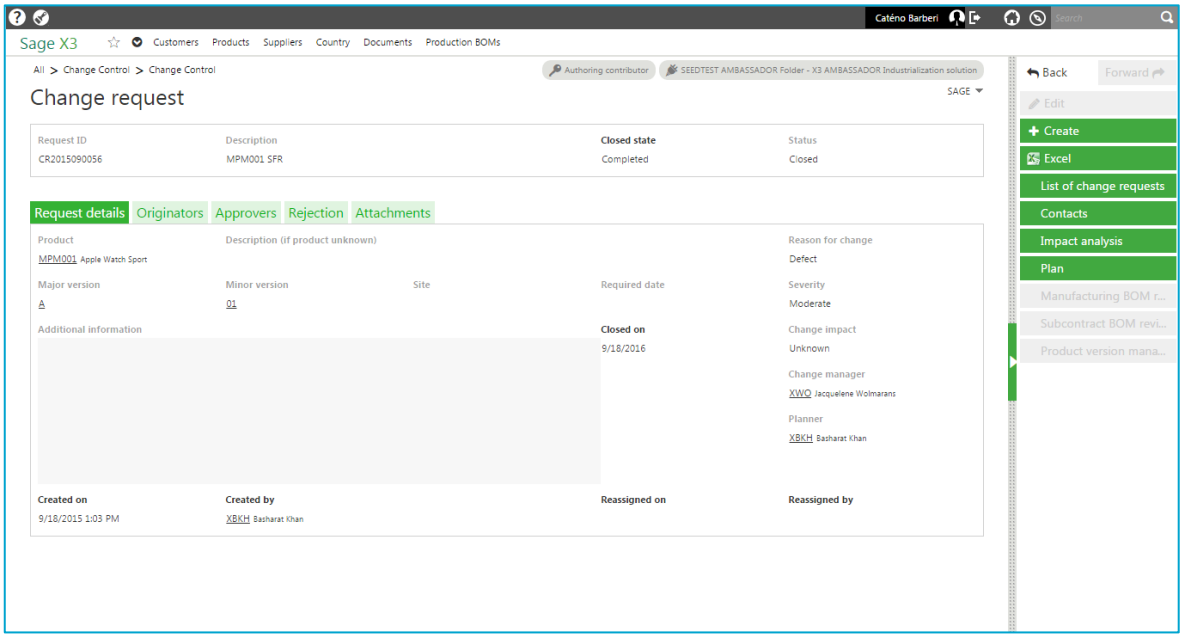

The steps are controlled by the following statuses: New, In Review, Rejected, Plan, Implement, Completed, and Closed.

The CCM process is managed by different user roles: Change Manager, Approver, Planner, or Actioner. According to the step of the process the user can be notified by an email notification. The email notification for the various roles can be switched on or off.

CCM module can be used with and without version management.

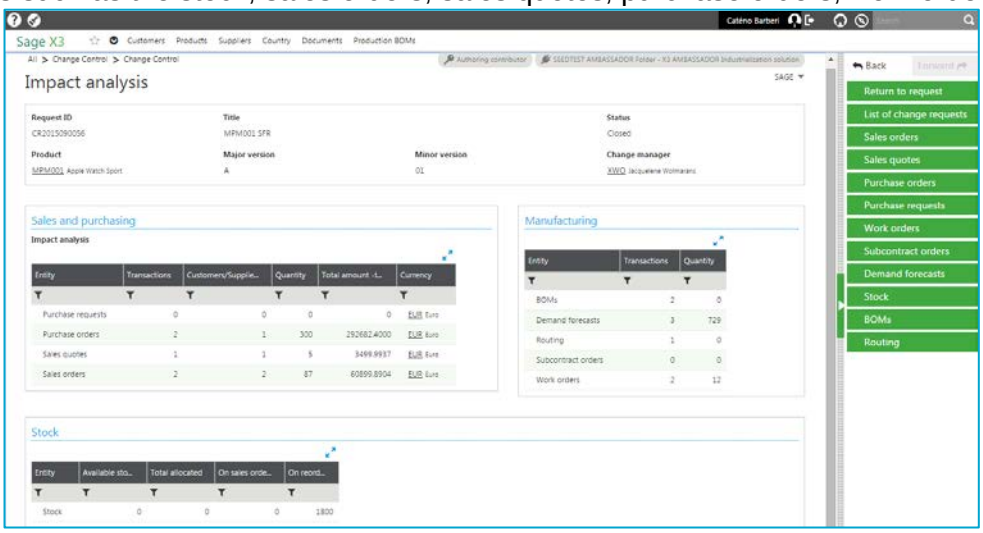
## Change request

A user can create a user request providing the information necessary for the approvers to review the request. A change request may originate from customer complaints, in-service failures, non-conforming materials, audits, internal feedback, product enhancement requests etc. from various sources.




## Impact analysis

The approvers have visibility to see the transactions that involve the product being revised so that they can make the right decision.  Impact analysis provides views on the main transactions such as the stock, sales orders, sales quotes, purchase orders, work orders, and BOMs.

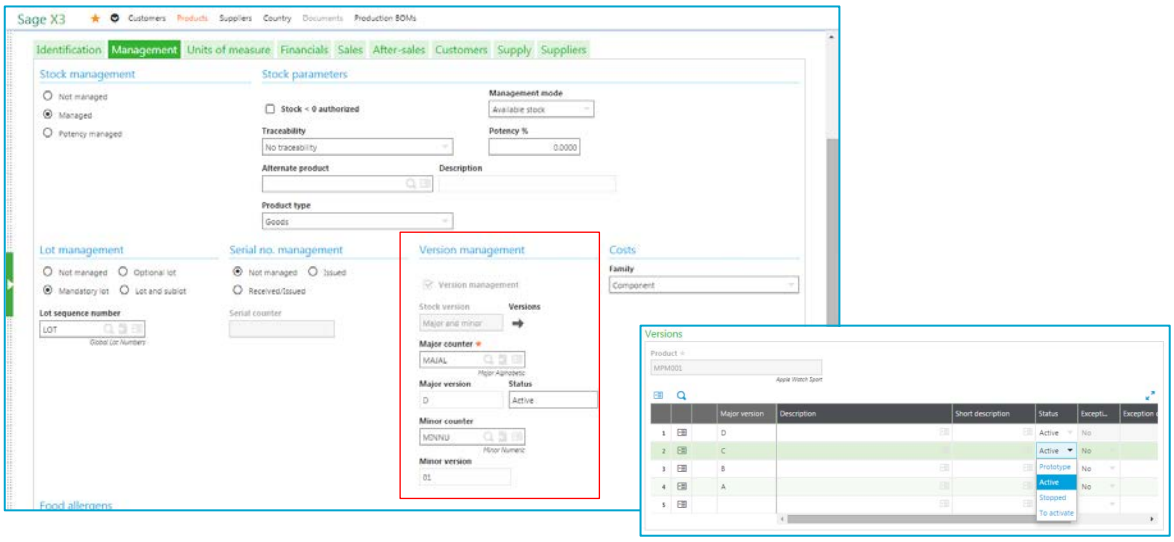


## 9.2 Version management

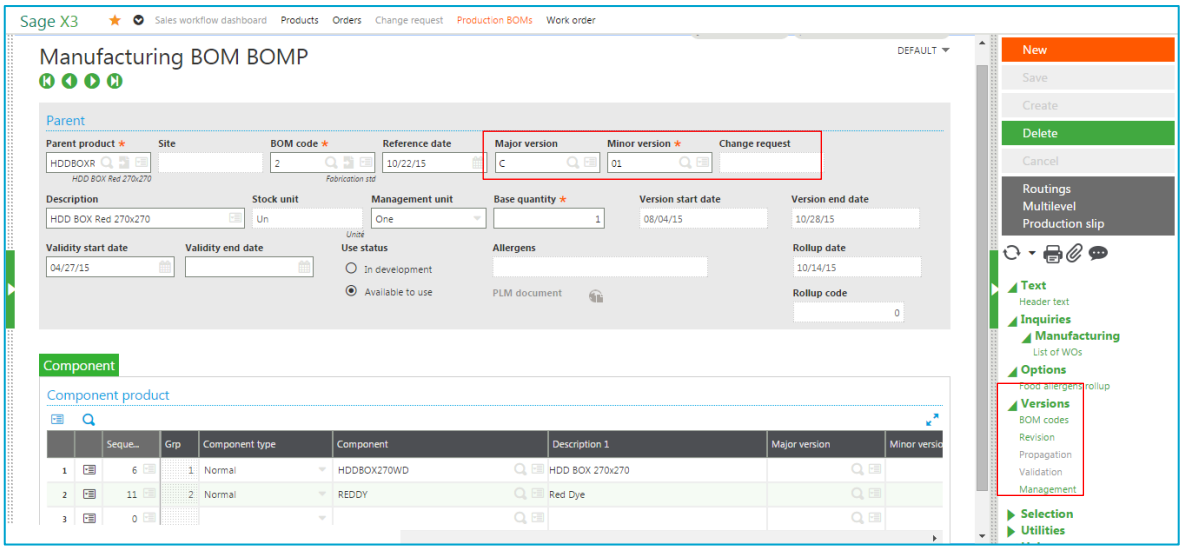
Version management can be supported by a change control process or managed alone. Version management helps the users to track versions of a Product (distribution product, component, semi-finished and finished product), and BOMs at Multi levels.

Products and BOMs can have major and minor versions. Major versions are applicable to important or critical changes, frequently impacting form, fit or function. Minor versions are applicable to cosmetic changes where items remain interchangeable. Different statuses are available to specify the product as available, exemption, closed, or design. It also supports the management of validity dates for each version.

Product

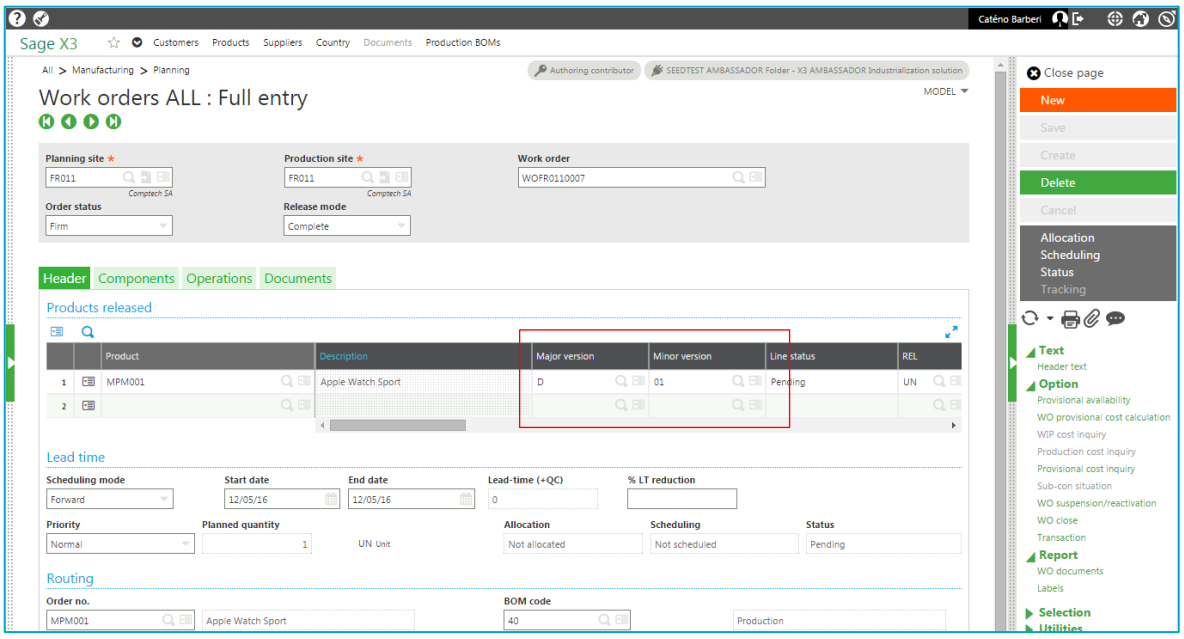



Bill of Material



Lot management must be set up on the product in order to use versioning. Major version is tracked with all movements. For each type of transaction it is possible to define the rules that should be applied according to the status of the version. (e.g. Can a product in prototype status be delivered?) The blocking process is manually controlled in this release.

Versioning is available in all sales and purchase documents or transactions (sales quotes, orders, delivery, returns, invoices, purchase requests, orders, receipts, invoices, returns). Versioning is also applied in the manufacturing process for work orders and sub-contract (external) orders, MRP processes (planning, workbench, grouping and buyer plan). If there is an open change request in progress on a version, there is an alert in the MRP planning workbench. Versioning is tracked in cost calculation, stock valuation and traceability.

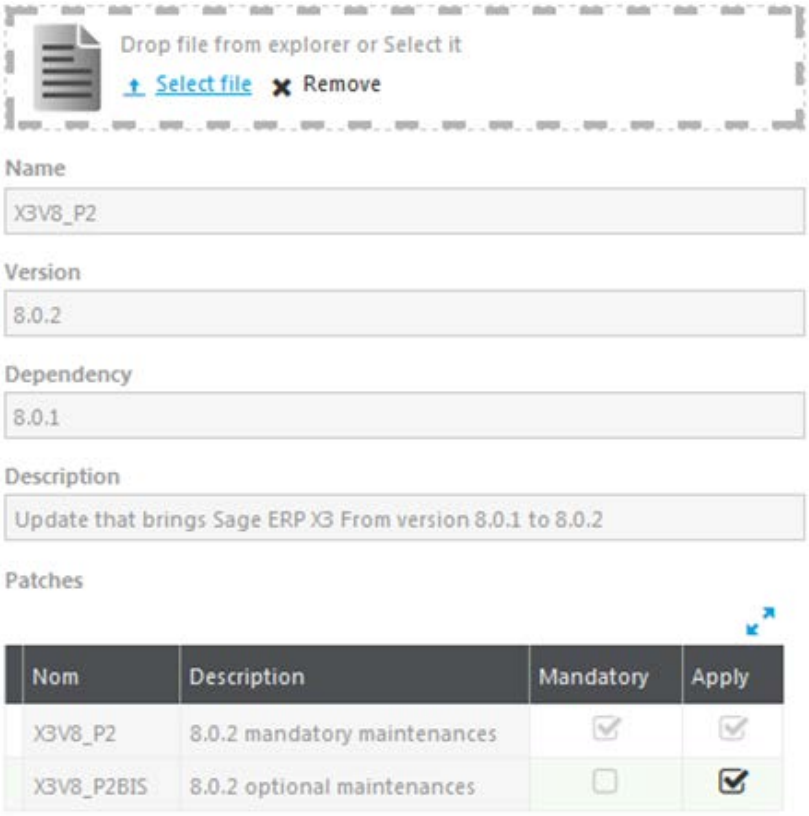



Product versions are tracked but there is only 1 product master record maintained in Sage X3. BOM records are kept for each version created. Versioning does not apply to routings in this release.

# 10.0 Updating Sage X3

## 10.1 Update function

The update process has been simplified with a new Update function. What was previously called a patching is replaced with the new function in order to make the process easier. Patches will be provided in a single ZIP file that can then be dragged from the user's computer to upload to Sage X3. The Update function will read the contents and validate that the patch list is compatible with the currently installed version.




Users can select which optional contents to apply. The update is automatically done in a controlled way:

- Batch server stops and restarts in update mode
- Patches apply in parallel per level once the upper level is updated
- The system restarts automatically after the last step if a stop occurs on an incident

## 10.2 Archive folder support

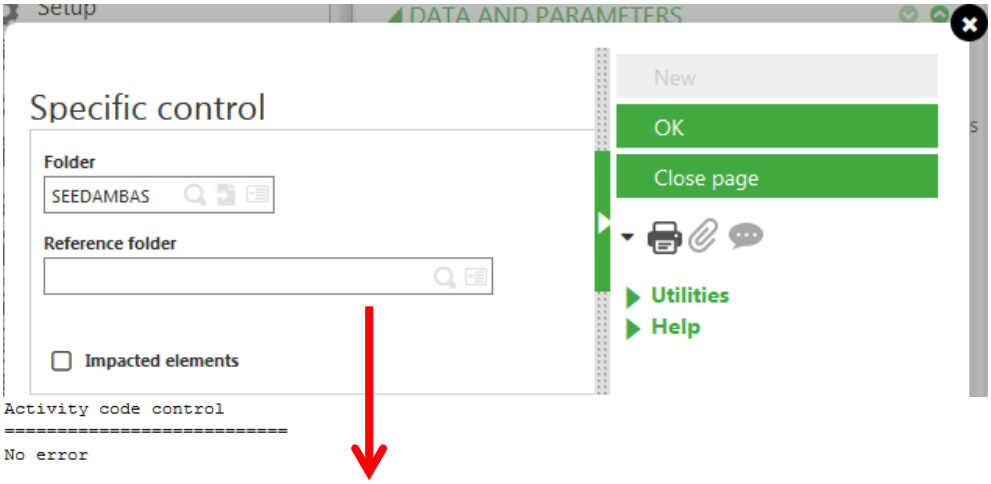
Archived folders can now be upgraded from v5 and v6 version to Product Update 9.0. See the documentation for instructions on how to update the archive folders to make them available to be viewed from the Sage X3 client.

## 10.3 Folder consistency

Sage X3 allows customers and partners to make modifications to their solution. Sage X3 also now comes with a tool, Specific consistency, that can be used to check the customizations made on a folder and validate that they are in compliance with the Sage X3 update best practices. A log file will be produced to list all of the differences between the folders.

It will identify any changes between the standard Sage X3 and the customer folder and classify them as Risks that should be improved in the future, Errors that will create new

issues for patching, and Fatal errors which need to be addressed before patching begins or will compromise the software.

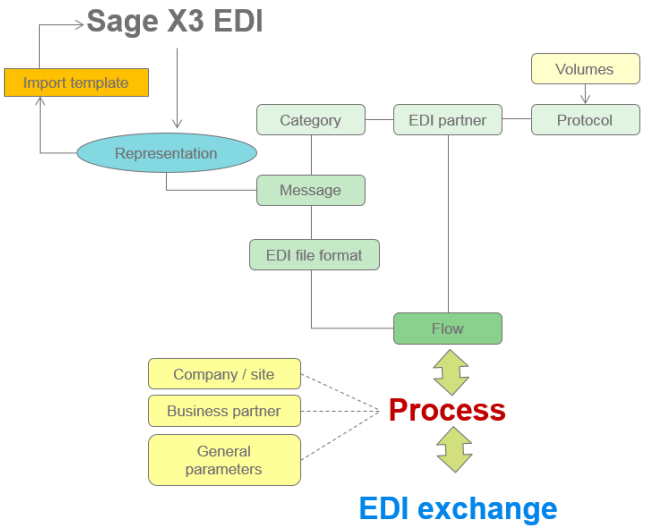



```
Activity code control
=============================
No error

Table control
====================
Error: Table NRYPAR, standard activity code FAL replaced by the specific activity code XAB
Error: Table ZTOTO, Specific table protected by an activity code

Data type control
==============================
No error

Miscellaneous tables control
============================
No error

Local menu control
=========================
Error: Local menu 63 not modifiable, but the number of choices has been changed (from 2 to 3)
Error: Local menu 1003, this specific local menu is not protected by an activity code

Screen control
====================
Fatal error: Supervisor screen ABATPAR has been modified

...
Script control
=======================
Warning: The script AXDTDBG.adx that exists in folder X3 should not be in the folder DEMOVDI

Number of error found : 3 Fatal error(s), 32 error(s), 12 warning(s)
```

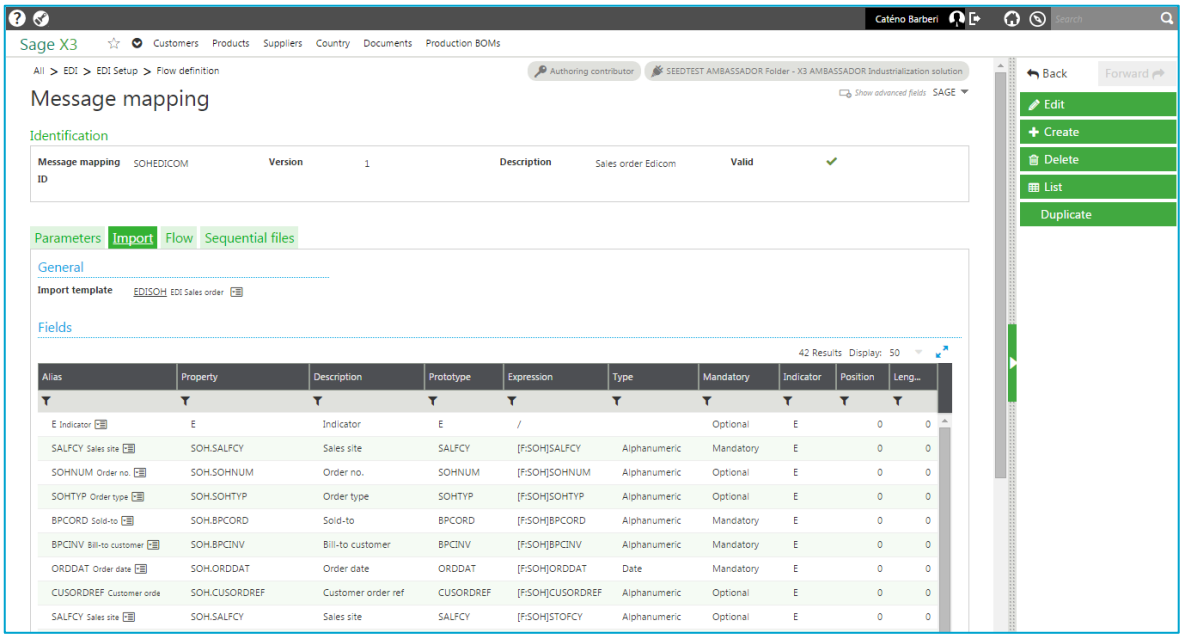
# 11.0 User Interface and Tools

## 11.1 Electronic Data Interchange (EDI)

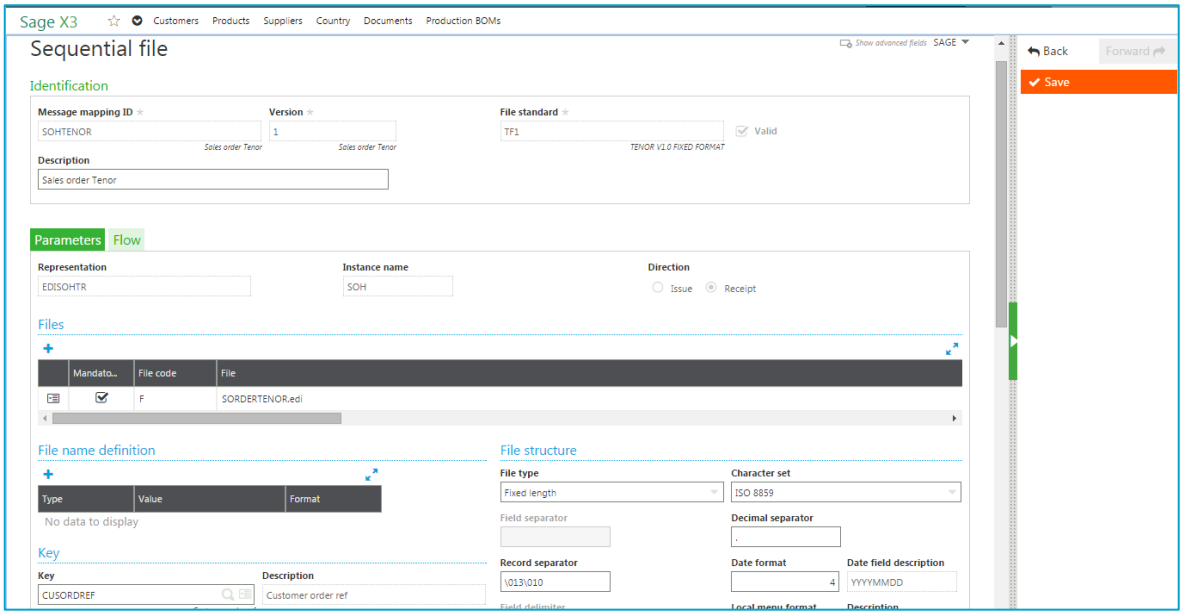
Electronic Data Interchange (EDI) is a system for conducting business through the transactions or business documents in a standard electronic format (not XML) between business partners.




The EDI module provides the ability to set up sales and purchases transactions based the files to sequential type. This release provides the sales documents for sales orders, sales invoices and sales deliveries from templates that are based on the standard EDIFACT and ANSI X12. According to the customer needs, these templates provided can be customized by Sage X3 admin.



The new transactions can be set up but a new format would have to be developed for each one.




## 11.2 Microsoft Office integration

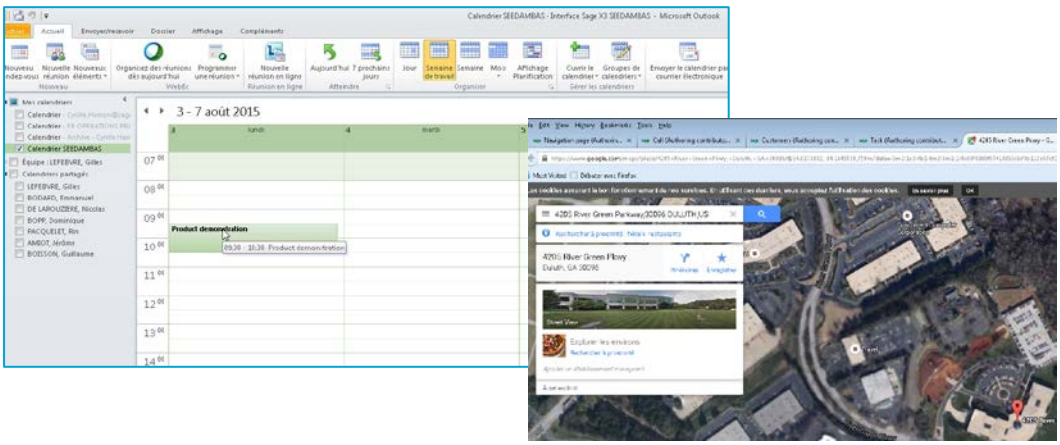
### 11.2.1 Keep clipboard during login

The contents of the clipboard are now kept when logging in to Microsoft Word

### 11.2.2 Hyperlinks and rich text management in Outlook interface

This improvement allows users to manage rich text and hyperlinks in the synchronization with Outlook.

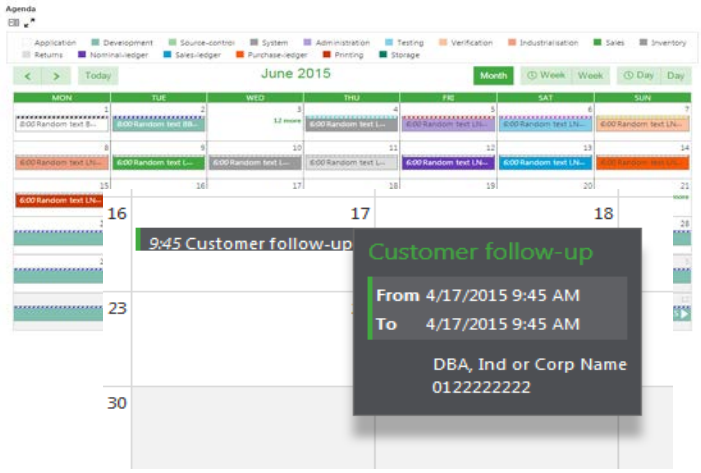
With this improvement, the synchronized elements contains hyperlinks allowing users to directly access Sage X3 functions through Outlook elements.




## 11.3 Calendars

Calendars are available in dashboards with colors indicating categories and detail popups with links to the transaction. Calendar popup dialogs will be closed as soon as you click

outside of the dialog. Multiple days events are now displayed well including an indicator in the case of a start or end date which is out of scope.

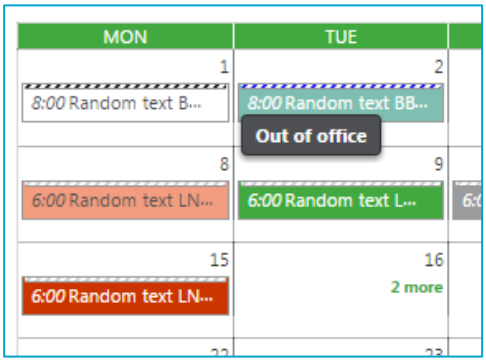



### Overlapping calendar items

Overlapping events are now displayed side by side to have a better visibility of the events.

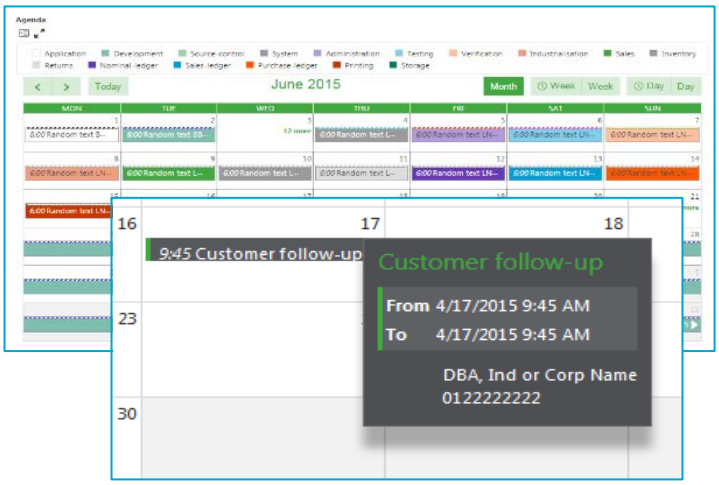
### Category indicator in calendar items

Events now have a top bar indicating the category of an event.




### Subtitles in the calendar item detail popup

A subtitle which is selected by the underlying request is now displayed in the event detail popup.




## 11.4 Searching

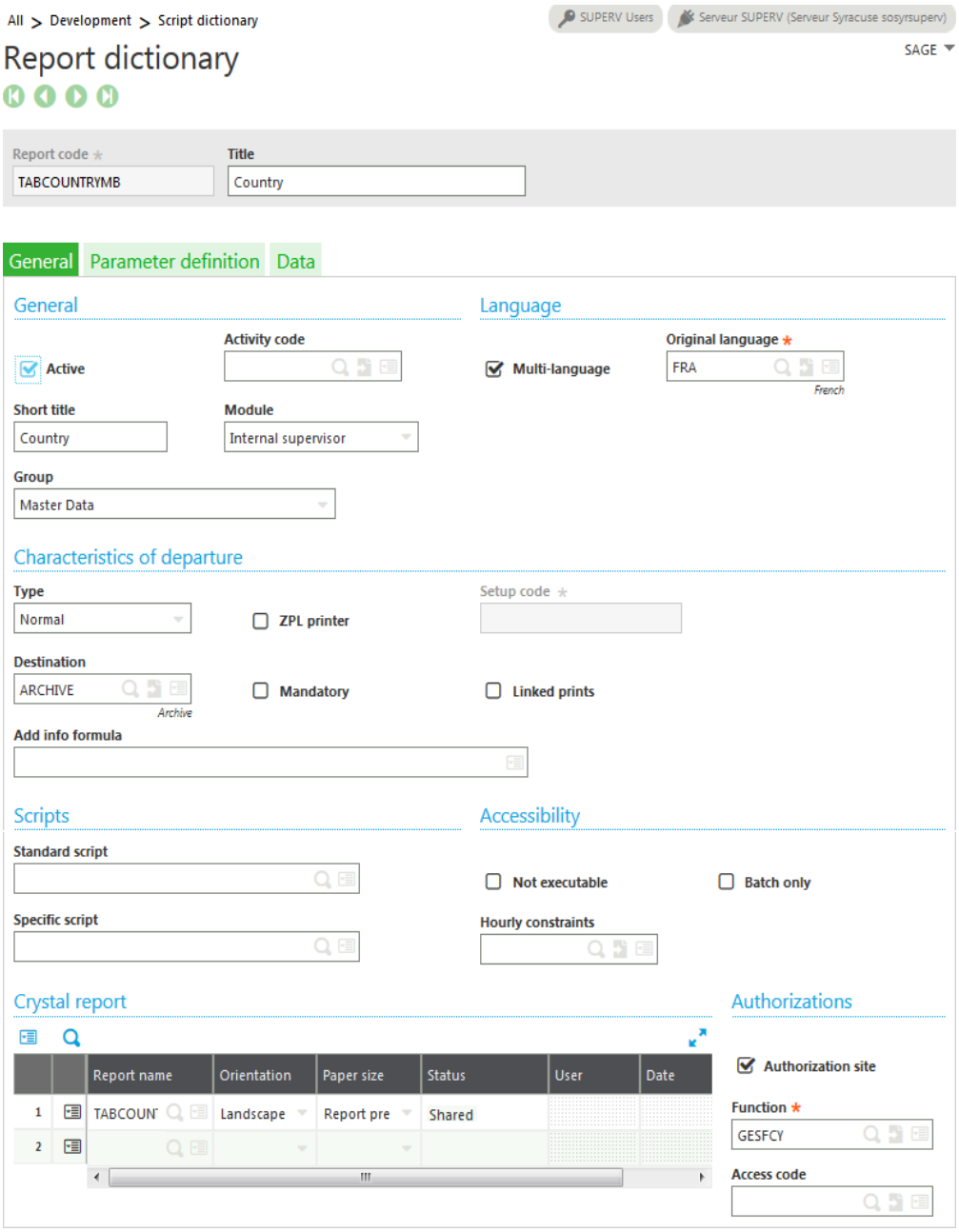
The Elastic Search component is updated to increases the performance of the indexation and search. As an equivalent to the “Direct call” capability users can enter a screen code to the search field and press

"ENTER". In the case that there is a screen code as a unique search result the function will be opened instead of the search result page. If you want to force the system to open a function by entering a function code, you can use Strg+ENTER to do it even if there are other search results matching to the search phrase.

## 11.5 Crystal Reports development

Users can now copy a Crystal Report from the server to their local machine using Sage X3. The connector has to be installed on the local desktop to allow the interface to download and upload a report.

A new status and user tracking have been added to the Report dictionary to define if the report in development can be shared with other users. By default it is only available to the user who downloaded it. Users now have the ability to revert back to the previous version of the report.




## 11.6 Navigation

### 11.6.1 Collapse all

The "Collapse all" capability in navigation pages includes now the top levels as well.

### 11.6.2 Label property

In the authoring tool you can now choose the option "Empty label" to prevent misalignment between

widgets

### 11.6.3 Contextual menu

The contextual menus (ESC+m) are now usable without the mouse. They behave the same way then the drop down area of a combo box.

### 11.6.4 Simplify date entry

In all date fields you can now enter the number of days to be added or subtracted from today's date (e.g. "+5" or "-7") or just zero to get today's date.

### 11.6.5 Automatically close panels

All panels (e.g. welcome panel) will close automatically as soon as you leave the area with a short delay.

### 11.6.6 Browser tab titles

All Browser tab titles are now consistently set to "ScreenOrDataName (Role) (Endpoint)". In case of a facet, it will look like "ScreenOrDataName - facet (Role) (Endpoint)"

### 11.6.7 Tooltips on icons

Tooltips are now displayed for icons which are placed on a screen.

### 11.6.8 Tooltips for truncated text

Whenever a text is truncated because of less space, the complete text will be displayed in the tooltip.

### 11.6.9 Breadcrumb (non-interactive)

The breadcrumb will now be displayed at the top position of a screen. It contains the menu path of a screen. In case of multiple menu paths for the same screen the first found path will be displayed.

### 11.6.10 Reducing line height in lists and in right panel

The vertical space between items in lists and in the right action panel was reduced to improve the readability of those screens.

### 11.6.11 Maximum numbers of characters

Once a user has reached the limited number of characters while entering data, they get a message in a tooltip pointing out this fact.

### 11.6.12 Back button

For web pages users have now a "back" button at the same location where the "close" button on classic pages is located which is an equivalent to the browsers "back" button. This simplifies the navigation since all buttons are at the same location.

### 11.6.13 Warning of lost changes

Whenever users navigate to another page before saving changes, they have to confirm a message. This helps the user to not lose unsaved changes.

### 11.6.14Themes

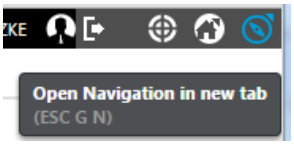
There is now the capability to choose a theme in the welcome panel to support different use cases, e.g. the usage of a projector which causes always trouble with the contrast or visibility challenges. Themes are defined by Sage and cannot be changed.

### 11.6.15Uppercase and lowercase characters

Settings configured in the Sage X3 format regarding uppercase and lowercase letters are now managed at client side.

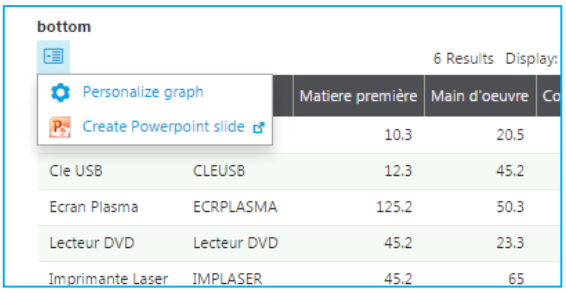
### 11.6.16Open navigation page from Classic pages

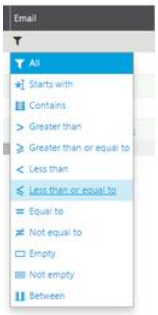
In addition to the “Open Home page in a new tab” there is now also an “Open Navigation page in new tab” available.




### 11.6.17Standardization of popup’s UI

The UI of the popup menus were unified to provide better visibility.




### 11.6.18Menu editor

The Menu editor has been improved to provide better usability.

- The label “Menus” was changed to “Menu items”
- The label “No menus entry” was changed to “No menu items”
- The label “New…” was changed to “New …”
- The label “Append Blocks” was changed to “New group”
- The label “Select menu item” was changes to “Add menu items …”
- For Modules and Submodules the order of the actions was flipped and the label “Select” was changed to “Add”

### 11.6.19Navigation between Web & Classic mode

When you close a classic page by clicking the “Close” button, the screen will be removed from the browsers history to not come back to the classic page by using the browsers back button.

## 11.7 Keyboard shortcuts

### 11.7.1 Modal screens by ESC

Modal screens can now be closed by using the ESC key even if the focus is in an editable field. If the users presses the ESC key after a data change in the field, this change will be undone and the second hit of the ESC key will close the dialog.

### 11.7.2 Shortcut for quick filter row

In read only grids which provide a quick filter row users can use the key ESC+q to jump to the filter line.

### 11.7.3 Shortcuts for menu bar

The shortcuts for menu extension are reintroduced.

### 11.7.4 Action panel shortcuts

Some additional shortcuts were introduced to improve the usage of Sage X3 with the keyboard.

**Left List**
Jump to Left List: ESC+Shift+LeftArrow
Toggle between sections of left list: ESC+Shift+DownArrow

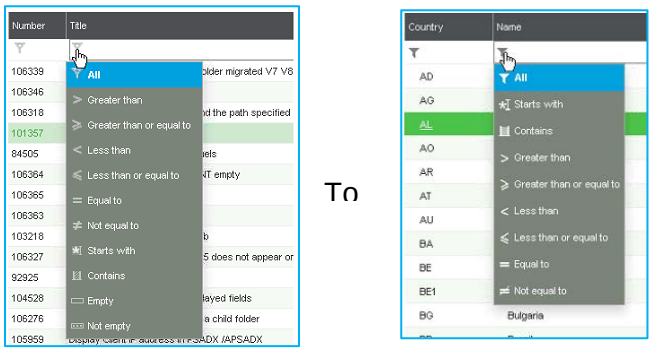
**Action panel**
Jump to action panel: ESC+Shift+RightArrow
Move to next item: TAB
Move to previous item: BACKTAB
Open or close menu group item: ENTER
Execute a menu item: ENTER

**Bookmarks**
Jump to bookmarks: ESC+Shift+UpArrow
Move to next bookmark entry: TAB
Move to previous bookmark entry: BACKTAB
Open bookmark entry: ENTER

## 11.8 Widget improvements

### 11.8.1 Reorder in Quick filters

The list of operators in the quick filter row was reordered to have the most commonly used operators on top of the list and to have the “Start with” operator as the default.




To

### 11.8.2 Sorting in grids + 'apply below'

In classic pages the sort in a grid will be removed as soon as the user enters a new line to prevent inserting wrong data.

### 11.8.3 Reduce lines height in tree views of Navigation page to get a better readability

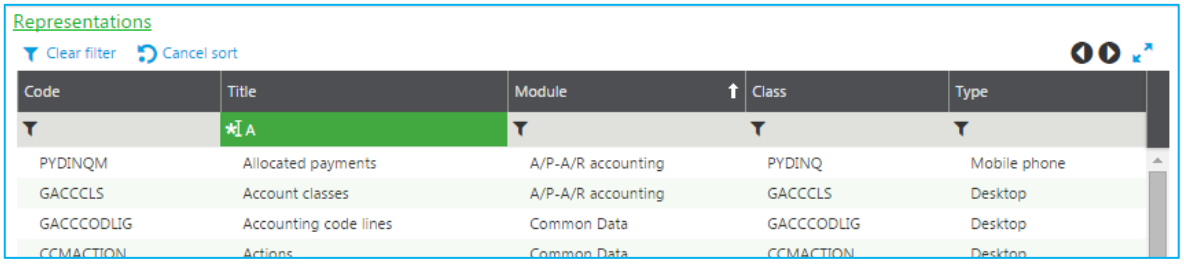
The height of the lines in trees were reduced to provide better visibility.

### 11.8.4 Keep used filters in navigation

When a user navigates back to a page where they had a filter set, the filter will be applied again which was not the case before this release.

### 11.8.5 Filter indicator and UI changes for quick filter row

The quick filter line now has a gray background and an active filter cell has a green background to provide better visibility. In addition there is a link on top of the table to remove all filters in one step, and also a button to cancel the sort.

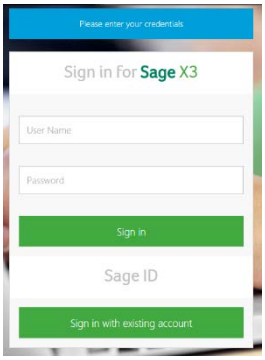



### 11.8.6 Maximize and normalize a grid

There is now an icon to expand a table to full screen in order to have the most data at a glance as possible. Clicking the icon will expand the table and normalize the table.

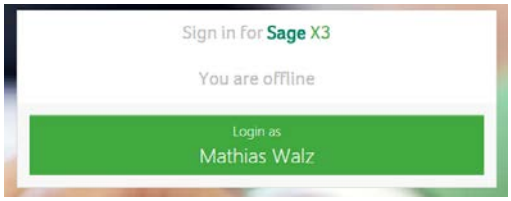
## 11.9 Mobile client

### 11.9.1 Authentication & Login

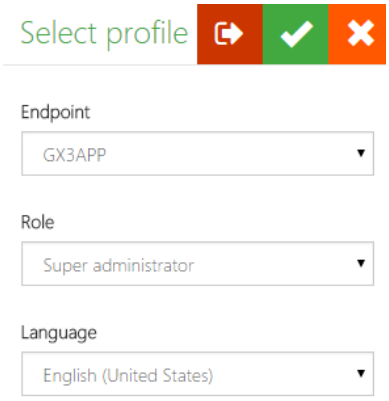



Before using the Mobile Client, every user has to provide a username and password to get access. On some environments, advanced authentication mechanism may be available, e.g. Sage ID.

Authentication is done on the backend, so as soon as there is no network connection, it's not possible to authenticate a user. In this scenario, it's only possible to sign in with the user that used the device before.




### 11.9.2 User profile settings

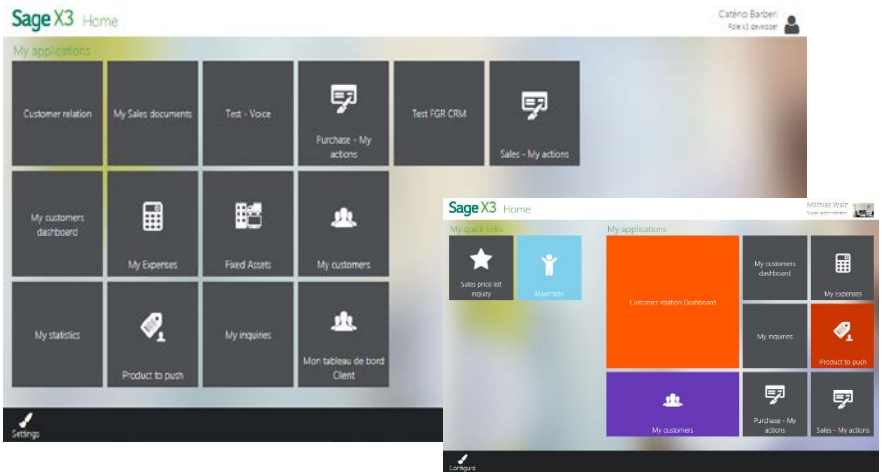



On the first login of a particular user, it's mandatory to enter additional information like the preferred endpoint, role and language. If this process is cancelled, the user will be logged
out immediately. The user profile information selected on the first login will be applied on every subsequent login.

The user profile can be changed by the menu item "Change user profile". The same menu item is also used to logout.

### 11.9.3 Welcome page

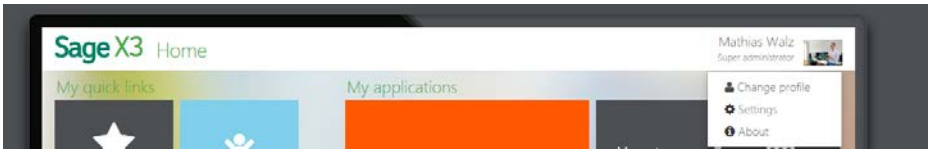
The welcome page starts the Mobile Client.
"My quick links" show pages that were pinned to the welcome page by the user. "My applications" Lists all mobile applications available depending on the role of the current user. It's also possible to change the look of any tile on the page.



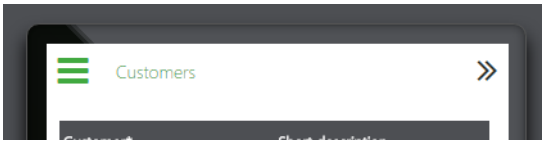
### 11.9.4 User interface

The user interface for the mobile client in this release is more responsive to the type of device being used. The UI supports tablets and smartphones and will adjust based on the screen size of the current user.

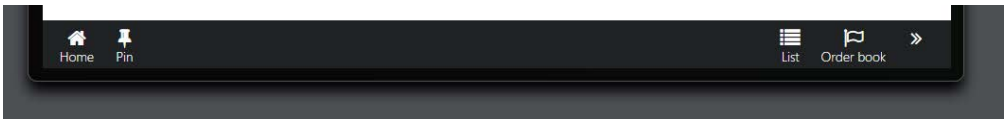
**Toolbar on tablets**
On tablets and mini tablets, the toolbar shows the user profile on the right including access to the user profile menu.



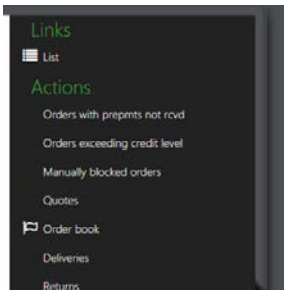

**Toolbar on smartphones**
There is no user profile information displayed for smartphones. Menu items will be accessible from the main menu on the top left. On the top right, there is an icon to open the right hand action panel.




**Footer**
Actions present in the footer will show up in the action panel on a tablet or the main menu on smartphone.



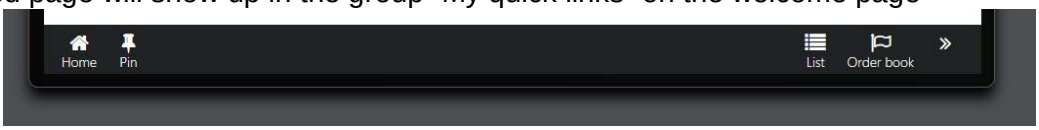

**Action panel**
The action panel opens up using the right icon in the header or footer of the page.




**Breadcrumbs**
Breadcrumbs show up only on tablets. They allow users to quickly jump back to a previously visited page.

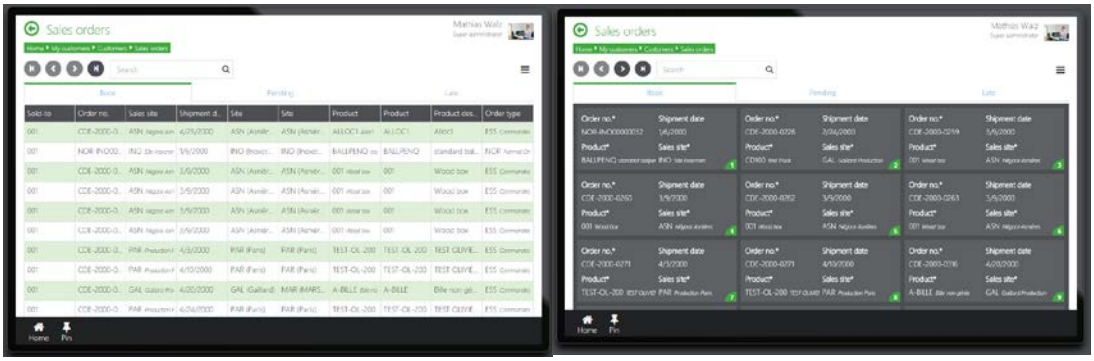
**Pin page**

A pinned page will show up in the group “My quick links” on the welcome page



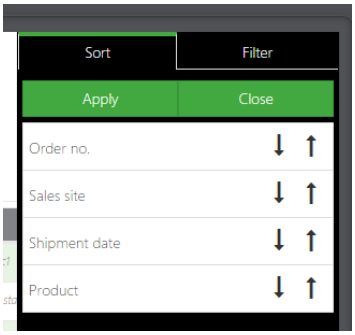

### 11.9.5 Query pages

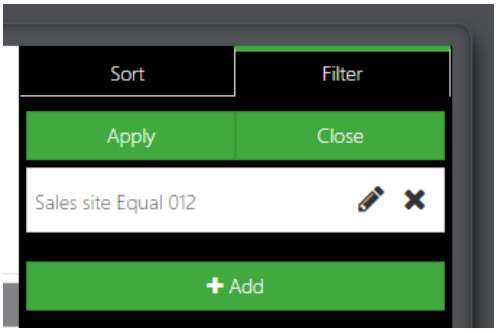
Query pages are used to display a number of records either as table or in a card based list.




### 11.9.6 Query pages – sort and filter

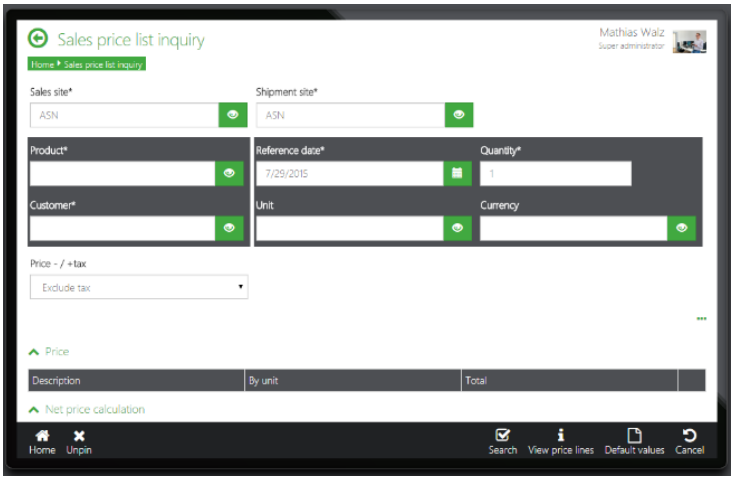
Users can sort columns ascending or descending and define filters based on one or more columns. The sort and filter criteria will be stored on the device. Once a filter is applied, it will be applied every time on this page until it is removed.




### 11.9.7 Detail pages

Detail pages are used to show all of the information for a record. They are also used to view or edit a record. They scroll from top to bottom and some blocks may be collapsible. Input fields can have a lookup icon to select valid values from a list

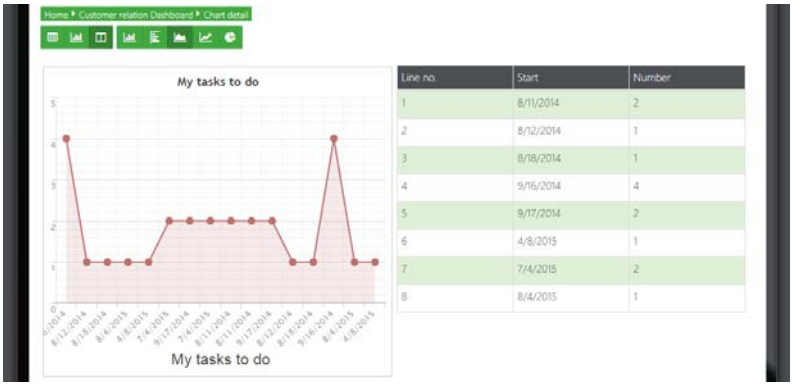


### 11.9.8 Dashboard pages

Dashboard pages are composed of one or more widgets. Widgets can display lists, details or links. On tablets, dashboard pages scroll from left to right. On smartphones and tablets held in portrait mode, they scroll from top to bottom. Some widgets support actions that can be triggered by using the icon on the top right corner of the widget.

### 11.9.9 Chart pages

Chart detail pages are full screen equivalents of charts displayed in smaller widgets.




### 11.9.10Offline capabilities

#### Offline login

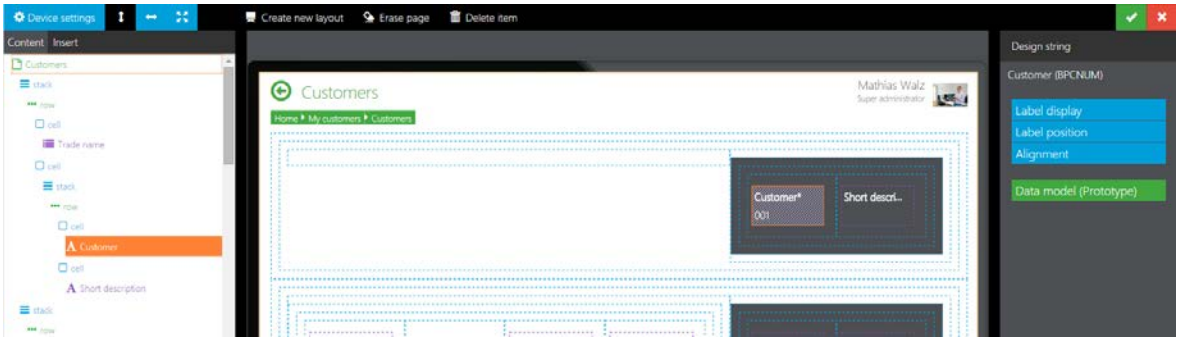
If there is no network connection a user can login using the last used user profile without specifying a password.

#### Offline data access

All data that is fetched from the server while navigating the application is automatically cached on the device. Once network connection drops, it is still possible to visit the pages that were visited previously. Some pages display a download icon in their footer or header. This can be used to download pages in a batch without user interaction to ensure they are available offline when needed.

## 11.10 Mobile Authoring

Authoring of mobile pages is done on a desktop PC and consists of 4 major areas. First, the header exposes global actions and settings. The left panel shows the current page's structure and content that can be added. The right panel shows properties that can be set for the currently selected item. The actual page in the middle of the screen shows a preview of what the user will see.




### Header

The header provides access to the following design options.

- Device Settings - There are multiple authoring preview settings available to simplify the design process. The device settings allow users to change the size of the preview area to the size of a specific mobile device to confirm the page layout's responsiveness.
- Create new layout - It is possible to create a new layout with no content or with a default layout.
- Erase page - It is possible to completely erase the current layout with this button. Otherwise users can remove a single item using drag and drop.
- Save and exit - The current page design can be saved or discarded using the icon on the right.

### Preview area

The preview area shows the page structure. All elements are shown with a border to easily distinguish the different structures.

Elements can be selected by clicking them. New elements can be dropped into the preview. During authoring, links, actions and lookups are disabled.

### Left panel

Content shows the elements of the current page, the elements can be moved in the tree by drag and drop. It's also possible to drag an element from the left panel into the preview area.
Insert contains elements available in the data that are not yet added to the page (unused fields). These fields can be added by dragging from the panel info the preview area.

New layout elements (Containers) can be added by dragging the container icons into the preview area

The panel can be resized using the splitter on its right

**Right panel**
The right panel shows the list of properties for the currently selected element. The properties are grouped into expandable boxes.

Expert mode and Data model options are available when selecting the root of the page. They allow the user to view and edit the technical page layout structure. This is only recommended for advanced users with a technical background.

**Field level authoring**
Allows the user to change the properties that are available for a field. Field level authoring only affects the appearance of the selected field. The most important properties that can be set are:

- Show or hide label
- Label position
- Text alignment
- Columns to be shown in a table
- Size or color

## 11.11 Advanced authoring

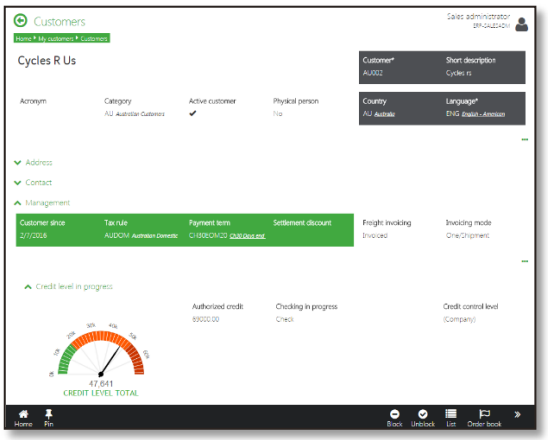
Advanced authoring capabilities are available to allow a designer to:

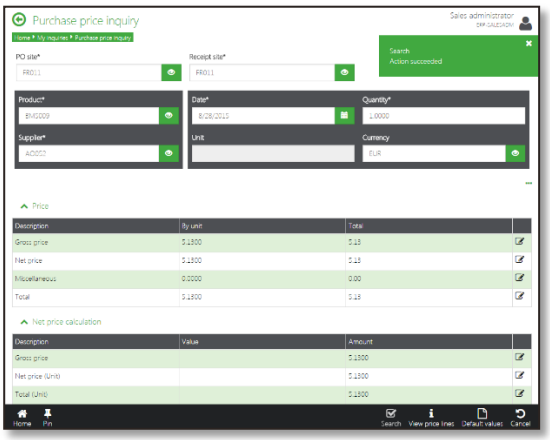
- Create new responsive layouts for a dedicated page from scratch
- Create dashboard page layouts that scroll horizontally
- Create a view page layout showing details of a record scrolling from top to bottom

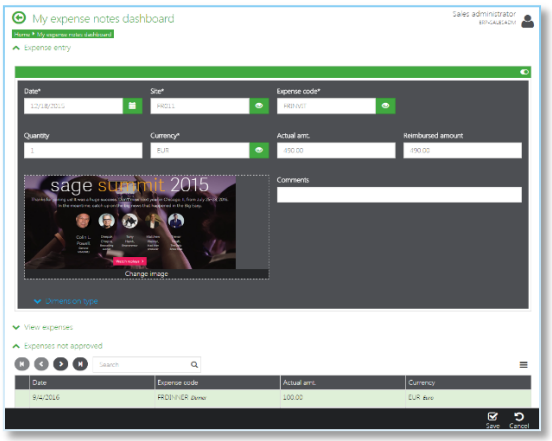
## 11.12 Mobile Client Sales KPI's

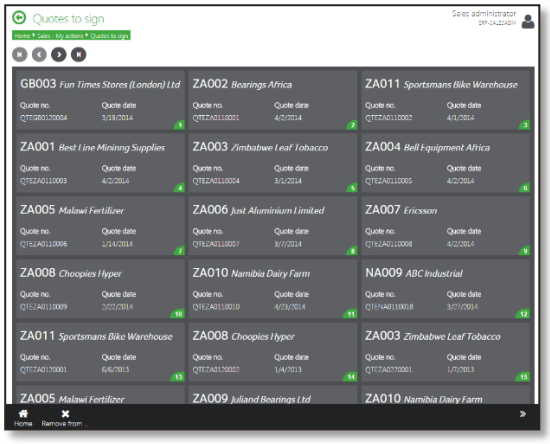
The improved mobile platform is fully opened to customization through the use of graphical queries and Sage X3 statistics.

**Sample**

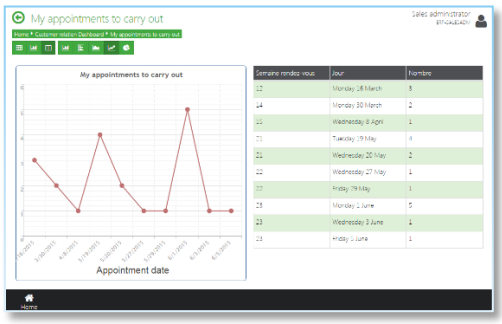


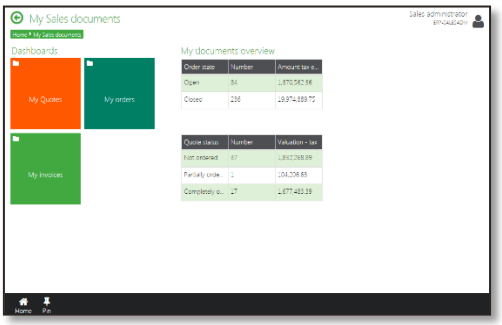



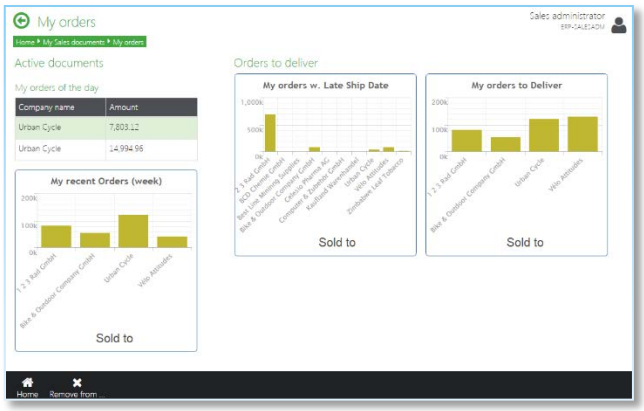


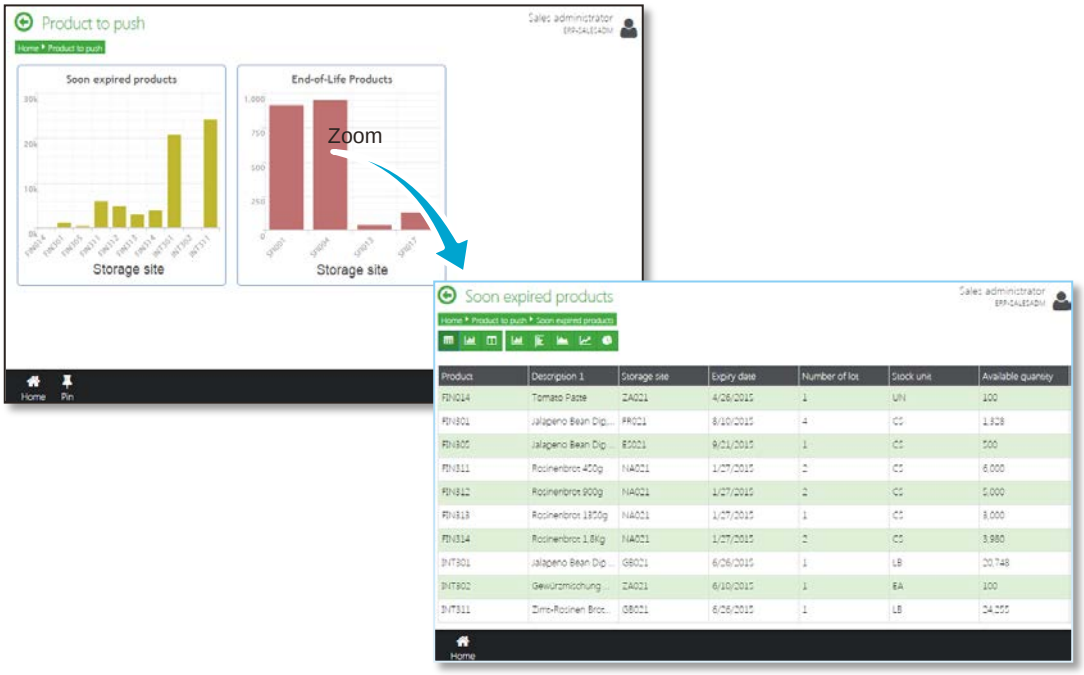




## Graphical queries



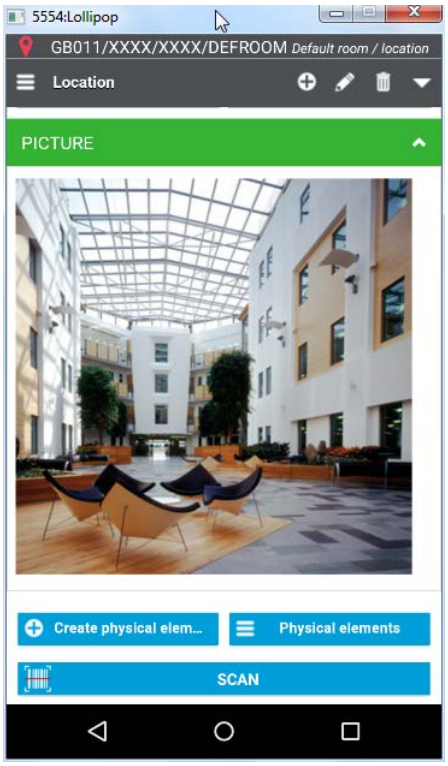

Product to push
Sales administrator
Soon expired products
End-of-Life Products
Zoom
Storage site
Storage site
Home
Pin
Soon expired products
Sales administrator
Product
Description 1
Storage site
Expiry date
Number of lot
Stock unit
Available quantity
Home

# 12.0 Mobile Apps

## 12.1 Mobile Web Apps

The mobile applications available in previous releases are now defines as standalone “Mobile dashboards”. The mobile applications are defined in new data-structures Personalization that were done for the mobile dashboards and the old mobile client have to be redone and cannot be migrated automatically.

## 12.2 Physical assets mobile app




Sage X3 Assets Inventory is a mobile app to perform the inventory of fixed assets. That also means the fixed assets inventory process previously available in Sage X3 has been removed and replaced by this mobile app.

The development of the Sage X3 Assets Inventory app has been the opportunity to enhance and modernize the physical assets management with the latest X3 technology.

Sage X3 Assets Inventory App accesses and manages the physical assets. Consequently the deployment of the physical assets management is the sine qua non condition to run Sage X3 Assets Inventory App.

This mobile app must be installed on a compatible mobile device (phone or tablet), that requires the installation of an APK file. The app is compatible with Android devices running Android OS ≥ 4.4.4 and < 6.0.0.

If a physical element is scanned (or selected) and if the value of the field location is not equal to the current location, then the header will be displayed with an orange background to alert on the discrepancy. Moreover, From the Physical elements screen, the following actions are available:

- Register (mark the asset as counted)
- Cancel the registration
- Dispose
- Transfer (the current location will be defaulted to the destination location)

**Transfers**
The transfer will result in the direct transfer if the physical element is not linked to an asset or if linked but without financial site change. For the other transfers, the movement will be set pending and will be validated by the actual transfer of the Fixed Asset.

**Disposals**
The disposal will result in the direct disposal if the physical element is not linked to a Fixed asset, otherwise the disposal will be set pending and will have to be validated by the actual disposal of the Fixed Asset.

# 13.0 Administration

## 13.1 Web services

Web services are now supported through the Sage X3 web server (node.js) providing a more secure interface and removing the dependency on Apache. SOAP web services are still based on the use of classic pages and utilize Sage X3 objects and subprograms and function in the same way as previous releases.

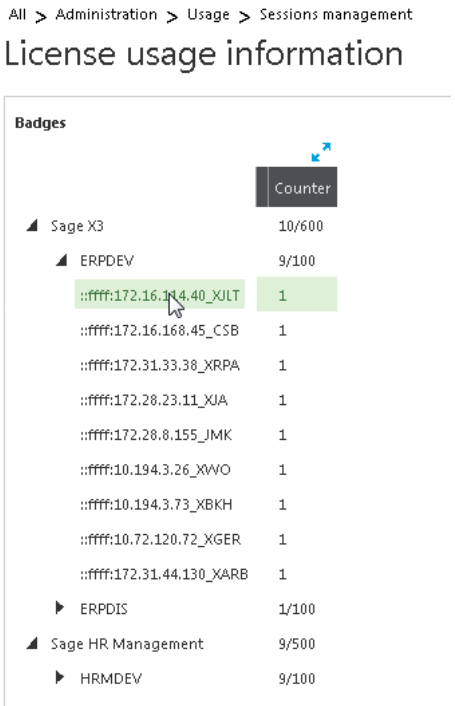
Licensing of web services is now based on data volume used by the connected applications to enable users to have more pools configured for various configurations. The tracking of the data usage is visible in the License usage information function. An email will be sent notifying the administrator when the data is 75% of the maximum. When the size limit is reached, it will slow down and if the second limit is reached, web services will be stopped.

This change will require changes to the address used by 3rd party solutions to interact with Sage X3.

## 13.2 License usage

A new function is available to identify how many security badges are currently in use as compared to the number assigned to the license. Expanding the badge type will display the IP address and the user name for each badge in use.

A Web sessions button will display the additional details about each connected session.



# 14.0 Connected Services

## 14.1 Credit Card Processing – Sage Pay & Sage Exchange integration

This feature expands on the current credit card integration to allow Sage Pay processing in UK/I market along with Sage Exchange in the NA market. Integrated processing of credit card payment transactions for sales orders, shipments and invoices (sales and AR) is required in many market segments.

# 15.0 Sage Connected Applications

## 15.1 Sage Connected Applications

| | |
|---|---|
| Sage CRM Connector - | Available |
| Sage Inventory Advisor - | In progress |
| Sage X3 Sales Apps – F5IT | In progress |

# 16.0 Deprecated features

This section identifies features or functionality that has been removed from Sage X3 in this release.

## 16.1 Fixed Assets

Sage X3 Assets Inventory is a mobile app to perform the inventory of fixed assets. That also means the fixed assets inventory process previously available in Sage X3 has been removed and replaced by this mobile app.

### 16.1.1 Budgeting

The Miscellaneous table 604 - Building has been removed and replaced by a function « Buildings » in Common data.

### 16.1.2 Asset tracking interface

The Fixed Assets mobile app replaces the previous method for updating inventory through the use of a handheld barcode scanner.