



Guide

Sage X3: What's New 2023 R1

A guide to new features and functionality for Sage X3, helping manufacturing and distribution companies to transform their businesses using technology.

Sage

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About

This document has been designed to provide you with an overview of new and enhanced capabilities delivered with Sage X3 Version 12 2023 R1 biannual update release. For a full description of the new features and enhancements delivered with this release please refer to the What's New section of the [Sage X3 Online help center](#).

Finance

General

Edit fields after monthly close

You can now edit these fields on Final entry even for a closed period.

Compliance

Austria

VAT Framework for Austria

The Austrian VAT declaration script is part of the VAT framework. You can use this setup for VAT boxes, VAT forms, and VAT returns.

Limitation: There no presettings and this is not yet compliant with Austrian VAT declaration requirements.

Belgium

Incorrect VCS number for Suppliers

The VCS number entered for Suppliers needs to have 12 characters.

France

Tax on vehicle changes for 2023

The Tax on company cars, Taxe sur les véhicules des sociétés (TVS), was replaced by two new taxes and the following reports:

- Tax on CO2 emission available with report FAS2857 – 2857 fiscal statement
- Tax on age of vehicle available with report FAS2858 – 2858 fiscal statement

The Vehicle screen in Fixed assets has been updated to support the new calculation rules.

DAS2 - 2023 updates for France

The files names generated for the TDS Bilatérale were updated for January 2023.

This is in compliance with the Règle de nommage d'un fichier 'Salaires, honoraires et actionnariat salarié' that you can download at Fiches descriptives des règles de nommage des fichiers.

Limitation/Warning :

- The sequence part in the file name is hardcoded 000. If required, you can modify this sequence after the file is created.
- The file generated is not compressed.
- The file name contains the SIREN of the sending or issuing site or branch.
- There are no controls for running the TDS file generation function for TDS-Bi for several companies at once. Proceed only if you know it is appropriate to do so.

VAT changes for 2023

The French VAT return setup was updated to comply with the Formulaire n°3310-CA3-SD for 2023.

Note that VAT box changes include:

- Modified descriptions
- New VAT boxes
- Removed VAT boxes

Please refer to the French tax authority website for details.

Germany

VAT Framework for Germany

The German VAT declaration script is now available in the VAT framework. VAT boxes, VAT form and VAT return can be created using this setup.

Limitation : this feature is a first step, with no delivery of presetting and not yet compliant with the German VAT declaration requirements.

Portugal

Working documents and payment declaration via web services

To be compliant with the 2023 fiscal authorities rules, you can use the new version of the EFAT web service to declare working documents in real time such as quotes, orders, proforma invoices, invoices, and payments.

IES changes for 2023

The IES export file was updated to comply with the rules defined for 2023 declarations.

Inventory extraction for Product-site classification

Manage product type by site' parameter (LOC chapter, POR group) determines if the 'Product type' field is available at the Product-site level. This needs to be the same for all sites for a company. When extracting inventory, 'Product type' field values are used for product-level values. If there are no values in this field, or if this field is not available, values from the 'Product-type' field for the product are used.

Webservice for ATCUD communications updated

You can communicate one or multiple series using a webservice.

- Use the Series communication function to communicate multiple series with the tax authority.
- You can still register, cancel, finalize, and review all actions.
- You need to add auto-invoicing series directly on the AT portal using a validation code from Sage X3 to remain compliant.

Transportation notes update

The communication code was added to the Transportation notes communication. This is required for all transportation notes sent to the fiscal authorities using the web service.

Spain

Tax management updates 2023

Form 303 has been updated to comply with new tax rules. This includes the equivalence surcharge tax rate of 0.62 percent.

Anti-fraud law compliance

For 190 form changes for 2023

Form 190 meets 2023 requirements such as including information related to the Minimum Living Income and capital gains. Other updates are related to VAT and IRPF fields from invoices.

BATUZ updates for 2023

Form 240 is compliant for 2023 Batuz requirements for Bizcaya.

Digital KIT

If you participate in the Digital KIT program, you can enter the required information on the Spanish legal data screen in the Companies function.

Updates to forms 303 and 390 for 2023

Forms 303 and 390 comply with 2023 fiscal year requirements.

United States

1099 updates for 2022 reporting

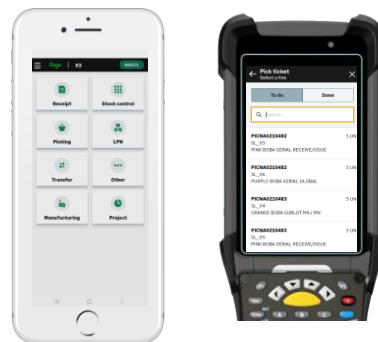
Forms 1099-DIV and 1099-MISC are compliant with the legal requirements for 2022 reporting.

Because of changes to the box numbers for forms 1099-DIV and 1099-MISC, you might need to adjust to the new box number for previous supplier information or payments.

Distribution

Sage X3 Mobile Automation

Scan codes with your mobile device



You can scan barcodes, QR codes, or Data Matrix codes using a smart phone or a tablet camera.

Print purchase orders to receive

You can use the Print purchase orders to receive function to select purchase order lines to be delivered and printed in the Receiving purchase orders report. You can use this report to scan the barcodes corresponding to the purchase order number, the supplier packing slip, and the product codes when you receive the orders.

Select stock line in the Stock change transaction

In the Stock change transaction, you can select the stock line to move.

Create LPNs on the fly when creating a misc. receipt document

In the Miscellaneous receipt transaction, you can create license plate numbers on the fly when creating a document, if required.

Create LPNs on the fly when creating a purchase receipt document

In the Purchase receipt transaction, you can create license plate numbers on the fly when creating a document, if required.

View product picture

You can view the product picture in the following Mobile Automation transactions:

- Stock by product-site
- View stock by location
- View stock by LPN

Project Management

Licensing policy change: Project copy for operational PJM badge

As a Project management user, you can use the Project copy function to copy the structure of one project to a different project.

Project management enhancements

- You can display the Financial overview, the Cost structure, and the Task planning functions with improved response times.

Sage X3 Mobile Automation

Time entry enhancements

Employees can use the 'My assignments' transaction to view the list of task operations they are assigned to and to record their time.

Manufacturing

Sage X3 Mobile Automation

Work order production tracking production label printing

You can print production labels from a Work order production tracking transaction when you create the tracking record.

Platform

To enhance your user experience, a number of add-ins have been delivered with the Sage X3 platform, including:

For new installations only

Admin Password

The Administrator needs to select a new password for the admin user when logging into the solution for the first time. The default password for the admin user can no longer be used beyond that first login.

Default password policy

Passwords need to meet these criteria:

The default password policy enforces complex passwords with the following criteria:

- A minimum 10 characters
- At least one uppercase letter
- At least one lowercase letter
- At least one numeric
- At least one non-alphanumeric character
- The passwords expire after 90 days, and you cannot reuse your last 3 passwords

This policy is a default that can be modified or replaced with another policy of your choosing.

DIME variable limited to 200

The size of the DIME variable is the between the maximum number of records on the screen and 500.

Notification server: OAuth2 authentication

You can connect to a Microsoft 365 email service using OAuth2.

Node.js 18: Linux 7 for Syracuse no longer supported

Sage X3 Syracuse Web Server now runs Node.js 18, which is compatible only with Enterprise Linux 8 and more recent releases of Enterprise Linux. The Sage X3 Syracuse Web Server now runs Node.js 18, which is compatible only with Enterprise Linux 8 and more recent releases of Enterprise Linux.

As of this release, you can no longer deploy the Syracuse Web Server on Enterprise Linux 7 platforms: Red Hat Enterprise Linux 7 or Oracle Enterprise Linux 7 are no longer supported.

You need to update any server(s) running Syracuse on Enterprise Linux 7 to Enterprise Linux 8 prior to updating Syracuse.

Recommendation: Update all Enterprise Linux servers to the latest supported version of Enterprise Linux.

HTML email text in workflow rules

You can use HTML as the email text in workflow rules.

Important

* This requires using the Notification server and does not work with the legacy email client {`*`}meladx{`*`}.

* Caution: When applying rich text (HTML) formatting, you need to apply the changes to entire Sage X3 formulas, including the pipe (`*|*`) separator, or to apply it to a string or part of a string within the X3 formula. You cannot apply formatting cannot to part of a formula's Sage X3 syntax.

See the how-to guide for details.

Selection Screen Display

The workflow signature circuit selection screen displays the names of delegates and next signatories.

API's

GraphQL API

Enhancements have been made to the Sage X3 GraphQL schema to add various nodes and properties, find below. For more information and supporting materials, [please click here](#).

- Sales order
- Purchase invoice
- Purchase receipt
- Sales return
- Sales invoice
- Sales delivery
- Purchase invoice (mutation)
- Customer (mutation)

Sage X3 Automated Test Platform

Enhancements have been made to the Sage X3 Automated Test Platform version 3.0.0 for your user experience.

Parallel testing

To improve performance, execute test in parallel.

Capability to select an element by picking using concatenation of text and (user) stored values

Sage X3 Automated Test Platform version 3.0.0, delivers new step definitions to select elements in picking list using combination of text and (user) stored values.

- Prior to version 3.0.0 the picking selection was only possible using one (user) stored value and a text pattern.
- With version 3.0.0 the picking selection can be define via pattern which can combine multiple (user) stored values and text.

Generate Allure report results in PDF

Timeout management improvement

Sage X3 Automated Test Platform 3.0.0 delivers new timeout management so you can identify the use of the timeout, for long interactions, such as locking tests on parallel execution, printing report, or shorter interactions, such as verifying the state or the visibility of the fields.

For more information refer to the Sage X3 Automated Test Platform User Guide.

ATP license management by session

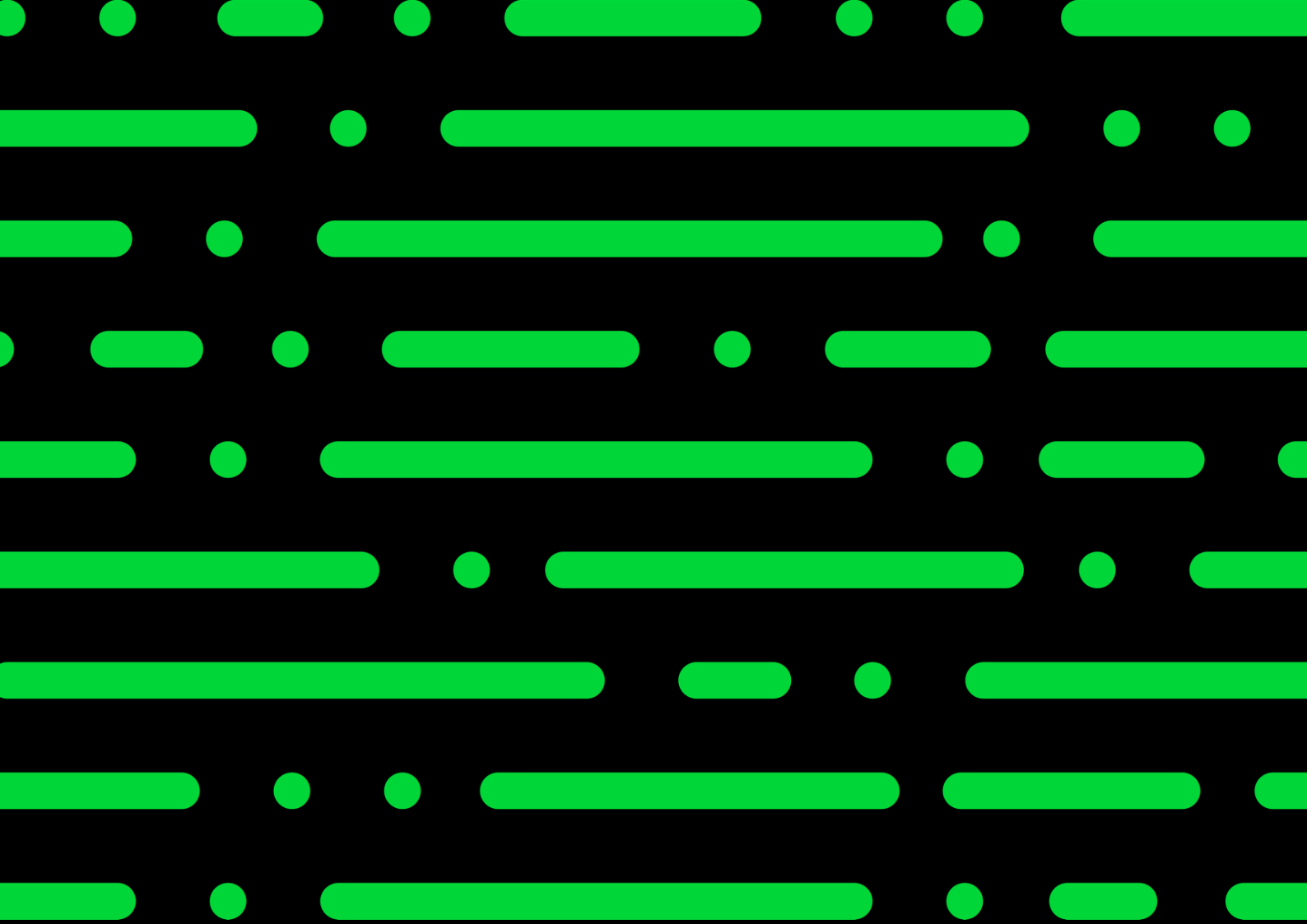
You can use ATP with all user types in your license. The number of ATP sessions in your license counts as concurrent connections through ATP for all user types. Concurrent sessions are counted towards the license for the duration of their lifetime.

Want to learn more?

The Sage X3 Central Centre of Excellence team are running a series of New Feature Highlights sessions where you can learn the value of the newest features of Sage X3 2023 R1.

Please visit [Sage University](#) to register for the briefings.

Release	Module	Presentation Language	Date (mm/dd/yyyy)	CEST time	Duration
2023 R1	All domains	English	06/01/2023	9:00h am	2H
2023 R1	All domains	English	06/01/2023	4:00h pm	2H
2023 R1	All domains	French	06/06/2023	10:00h am	2H
2023 R1	All domains	Spanish	06/15/2023	9:30h am	2H



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