Sage ERP X3 for Service Industries
Project and Job Costing

In today's challenging environment, companies are recognising a need to refocus on their core business and expertise. As a result, many are outsourcing a growing number of tasks, which explains the boom in the corporate services market that has been reported over the last few years.

This sector covers a number of activities, with the companies involved generally experiencing high levels of growth and looking to exercise detailed control over their activities, while maintaining close relationships with their customers.

Sage ERP X3 for Services helps you simplify the management of your service activities and keep the operational, sales and financial aspects of your customers' projects firmly on the radar. Its features are tailored to the needs of professional service companies, especially businesses delivering operational services, such as recruitment and facilities management, or intellectual and technical services.

Industry Solution	Sage ERP X3 for Service Industries		
Industries	Intellectual services	Technical services	Operational services
Business Process	Project management	Job costing	After sale
Business Challenges	Data & process integration	Simplify project management & follow up	Measure financial performance of a project

Your main challenges involve overseeing your customers' projects, from design through to completion, with a dual customer and operational view, and include:
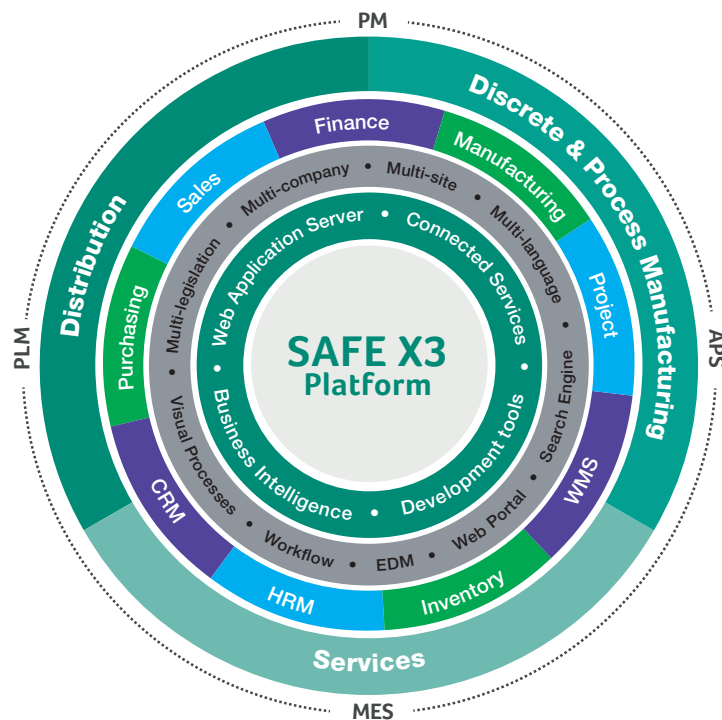
- Centralising all the project-related components and events, and standardising the associated processes.
- Simplifying project management and ensuring accurate tracking: a reliable evaluation of plan which measures need to be taken.
- Measuring project financial performance in order to control jobs, assess their profitability, draw comparisons between current projects, model transactions for tracking, forecasting and managing customers' projects, and archiving current statements.

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"Furthermore the Sage ERP X3 Project and Job Costing module allows us to follow progress on our deals in minute detail, along with costs incurred and costs to come.

Catherine Bacconnier, CIO Acoem

Sage ERP X3 for Services
A wide functional scope

Sage ERP X3 for Services main functions:

Project Management

- Project management structure
- Project template & projects link
- Dependency of level
- Definition of operations generated
- Internal & external view
- Detailed tasks/products defined on the lines
- Invoicing rules (Situation / Fixed Date / Steps…)
- Invoicing generation (invoice per project, per customer, entities…)
- Purchase, distribution, manufacturing, services lines links to the different processes
- Turnover and costs defined at the line level & aggregate to other levels
- Project review through situation
- Saved situation
- Automated situation
- Generation of operations due to the situation (service resquest, purchase, working order, invoices…)
- Automated invoicing
- Manual adjustment of remaining time

Service request

- Operation of services
- Generated by the situations
- Assigned or not to a resource
- Assigned or not to a project
- Approval process definition
- Time sheet transaction
- Expenses sheet transaction
- User Sheets based on the web, smartphones, tablets
- Approval definition
- Definition of processes depending on operations entered
- Default value definition
- Default operation definition
- Resource definition (default value, site, team, hourly rate…)
- User datasheet definition
- Mass entry report activity
- Situation update

Recurrent contract

- Periodical invoice and / or service request
- Contract structure definition
- Maintenance contract
- Installed base missions
- Regular invoicing period
- Revision type definition
- Generation frequency
- Forbidden periods
- Invoicing simulation

Cost accounting

- Analytical dimensions
- Default dimensions
- Accounting links definition
- Accounting interface
- Journal entry from time sheet
- Budget generation
- Global project review, graphical explanation, traceability of operations

Sage ERP X3 for Services
delivers benefits across the core processes of your business

Project and job costing and cost tracking

The project and job costing module brings together the data and processes required to define a project, from building the sales proposal through to carrying out the different project-related services.

This flexible and agile module helps define the project as a series of services and deliverables, split the project into stages, and associate invoicing models relating to the project (by progress, stage, fixed date or fixed cost). Statement generation can be used to generate assignment orders, and activity reports entered in web mode update progress on the project.

Jobs are monitored, and graphical dashboards provide an intuitive, visual control mechanism.

Financial statements help control margins and track schedules.

CRM and after-sales service

With the CRM module, you can manage your contacts and representatives, and assign them actions or tasks, such as appointments, service enquiries, callout requests and phone calls.

The CRM module maintains a list of all the actions logged. All the equipment in your customer installed base is monitored by operational status and service activity Automated services are planned as part of recurring contracts to better anticipate lead-times.
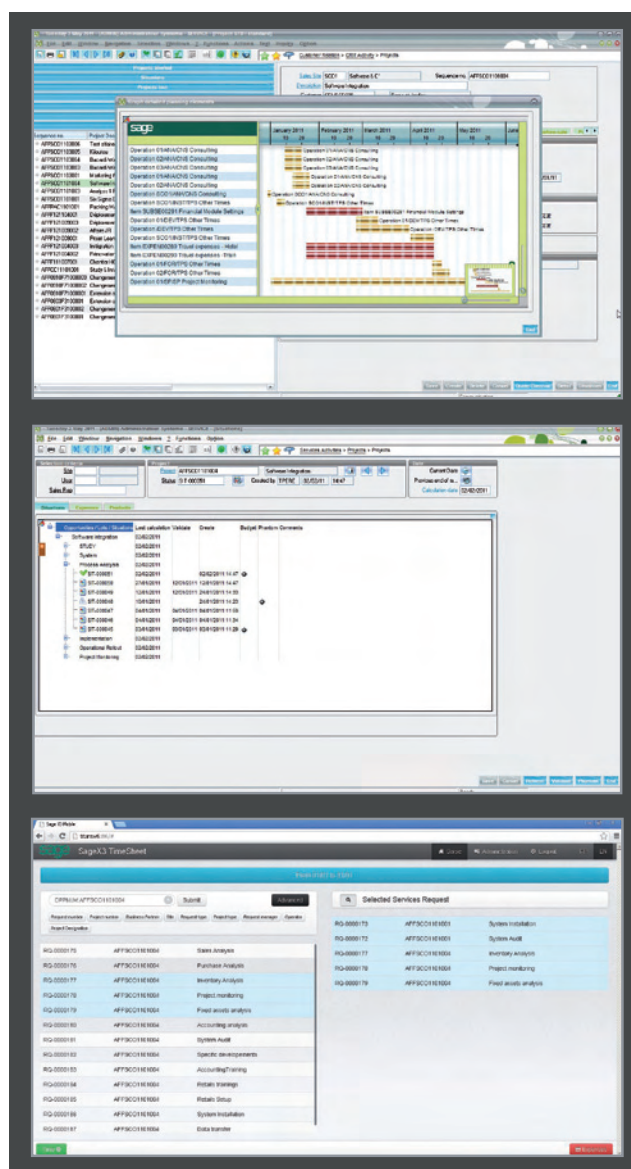
Finance

Sage ERP X3 for the Service Industries offers analytics and consolidated view reporting for an overview of activities for all projects being managed.

Financial accounting, cost and budgetary accounting with support for multiple companies, multiple sites, multi-legislation, multiple accounting plans and multiple currencies, management of spending and investment commitments, management of payment deadlines and cash collection, payment management and factoring, Sage ERP X3 spans the entire financial management chain, from financial and budgetary accounting through to commitments and fixed asset management.

Decision support

Decision support tools have become essential management aids for analysing and measuring a company's key data: sales performance per customer or product, from trends in expense accounts to manufacturing cost analytics.

Seamlessly integrated into Sage ERP X3, the decision support tool allows users to collect, consolidate, model and extract your company data for informed decision-making and provide an overview of the activity.

Sage ERP X3
An open technology

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Sage ERP X3 is a complete and integrated management suite, covering all your company's operational needs in terms of production management, distribution, logistics, finance and human resources.

Sage ERP X3 is a multi-legislation, multi-lingual and multi-currency solution and can be adapted to suit the specific elements and legal requirements of each country. It also guarantees optimum management of midsize and large companies, on both a national and international scale.
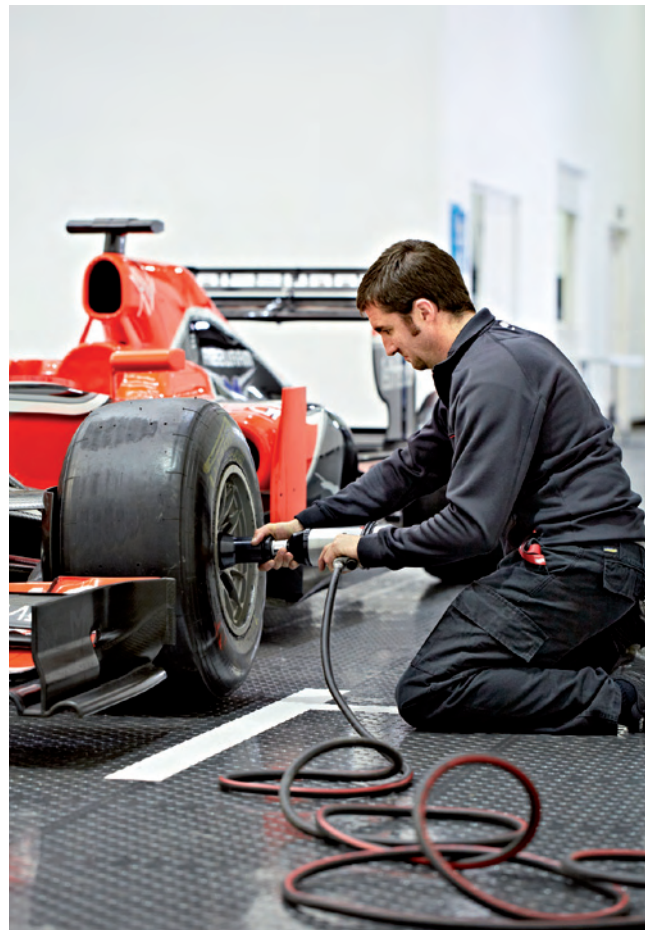
An open, scalable and flexible technology which adapts to change

Powered by our SAFE[1] X3 platform, Sage ERP X3 transforms your integrated management system into a truly collaborative internal and external environment. Based on flexible, open architecture oriented towards web services, Sage ERP X3 can cater to up to 2,000 simultaneous users within your organization.

With built-in technical functionalities available as standard, SAFE X3 makes it easier to use and manage Sage ERP X3: workflow, publication of web services, JAVA bridge, batch server, out-of-the-box business intelligence, web portal, etc.

- Quick implementation thanks to pre-configurations.
- Enjoy report publication and decision-making tools built into the platform (integrated Crystal Reports, decision-making datamart operated via Business Objects, etc.).
- Operate using the market's leading operating systems (Windows, Unix, Linux), with the standard databases of the market (Oracle, SQL Server).
- Customize your solution by using integrated development tools and define your user interface.
- Increase mobility and access your dashboards via Sage Enterprise Webtop, wherever you are.
- Access information contained in Sage ERP X3 quickly and as easily as you search the web. Just type a term in the search box and find what you're looking for.
- EDM functionality which indexes and archives electronic documents and content, so users can access them directly from the ERP.

Planning, management and reporting are gathered into one single process. You make decisions more efficiently and seize market opportunities more quickly. SAFE X3 provides support during organizational change in your company, such as centralization and decentralization.

(1) SAFE : Sage Application Framework for the Enterprise

Sage ERP X3
Simple to use, rapid to deploy and cost effective

Sage ERP X3 is intuitive and user friendly thanks to its many built-in graphical components. The Sage Visual Processes™ editor is easy for users to get to learn and adapt thanks to its detailed and ready-to-use job sequences.

Sage ERP X3 can be adapted to suit your needs and your development as it can be deployed gradually and progressively. As it is easy to learn, training and change management time is reduced and its wide range of pre-configurations will also save time during set up. Thanks to its quick implementation and low TCO, Sage ERP X3 provides a much quicker return on investment.

A business solution designed with the user in mind:

- Navigation made easier by interactive graphical processes
- Portals designed for specific roles with advanced performance indicators
- Full integration of office tools
- Powerful customization tools for more flexibility

A business solution centered around the Web:

- A solution that can be accessed in real time with a simple internet browser, internally and externally
- A dynamic, intuitive web 2.0 portal that provides easy access to ERP and external application data
- A solution that makes it easy to integrate your branches, subsidiaries as well as suppliers, and customers
- Interaction made easy with other business applications

Sage
Made-to-measure management solutions

The world's third-largest publisher of management solutions, Sage simplifies and automates the management and business processes of 6million companies in more than 70 countries. With Sage, customers can build an information system that fits their needs so that they can rise to today's and tomorrow's challenges.

Sage provides midsize and large companies with integrated and modular management solutions, covering all company operations and all types of projects: ERP, financial management and accounting, human resource management and customer relations management solutions.

The secret of Sage's success is its one-of-a-kind approach: local expertise to meet the specific requirements of each country and a worldwide presence that enables us to support our customers regardless of the size of their project. Sage is supported by a network of 28,000 dealers around the world to ensure quality and to keep its service local.

Sage owes its development to both organic and external growth, driven by profitability. With its acquisitions policy it has been able to increase its range of added-value products and services and increase the number of countries it operates in: each company it acquires is selected according to the capacity of its workforce and the degree to which its products contribute to Sage's expertise.

Sage services, support, advice and training to suit your needs

To help you optimize the use of your products, the experts at Sage offer you support throughout the life of your project by providing Support, Consultation and Training sessions.

As part of your international development, Sage and its local experts will be with you at every step of the Sage ERP X3 deployment process.

They chose Sage ERP X3

10Rajeb	Holmberg
Aceto Corporation	Hoya Vision Care
Adelya	Institut Curie
Allied Metals Corporation	Killgerm
Alloy Polymers	L'Express des Iles
AM Leonard	Maileva
Antartic SA	Market Securities
Asialand	Marussia F1 Team
Asica	Mikli International
Avmor Ltd.	Namakwa Diamonds
Avon Rubber	Natec Medical
Barrault Horticulture	New England Natural
Bearings International	Bakers
Blount Fine Foods	Olmix
Boiron	Onsrud Cutter
Café Merling	Palladium Group
Carson Home Accents	Profalux volets roulants
Cartadis	RM Foods LLC
Comepa Industries	Royal Bafokeng Holdings
CRP Industries	Rudy's Tortillas
Docapost	Russel Sigler
East Cost Olive Oil	Satellite Industries
Eurotainer	Schroeder Company
Fonciere des Regions	Sirmel
Fortal	Sligh Furniture
Ganong Bros. Limited	Sonnax
Garden Protein	Soredim
International	Steelcraft
Garland Industries	Sveltic Claude Léger
Golden Artist Colors	Synergix
Hammond Manufacturing	UreSil
Hedis	Woodlands Foundation
Hiconnex	World Minerals…

Sage ERP X3
around the world

A presence in more than **60** countries

3,700 customers

195,000 users

260 resellers

2,000 consultants

To find out more visit
www.Sage**ERP**X3.com