

Sage X3 for Services



"We are completely satisfied with the implemented solution. It provides faster, more reliable and transparent results."

Catherine Bacconnier
IT Director and Project Manager, ACOEM

The services sector is booming. A continuous decline in the significance of manufacturing over the last 20 years, has been accompanied by a relatively strong increase in the proportion of added value and employment accounted for by the service sector in the economy as a whole.

However, maintaining an overview of operations characterised by complex projects or high numbers of service and maintenance contracts poses a real challenge for service businesses today. An intuitive solution capable of automating tasks is an essential requirement.

Is your company a service business?

The Sage X3 Services module, Project and Job Costing, helps you streamline administration of service activities and manage projects, maintenance and service tasks professionally and individually. Sage X3 Project and Job Costing saves you valuable time, increases your efficiency and provides a transparent view of both status and costs. The solution's functional scope is tailored specifically to the needs of professional service businesses.

Your challenges

- Different systems in operation
- Time-intensive project definition
- Complex administration of activities throughout the entire project life cycle
- Time sheets entered manually and not integrated in the system
- Tasks not assigned to the appropriate resources
- No efficient tracking of projects
- Managers spend too much time on tasks bringing no added value
- You need a simplified and automated invoicing system with different calculation methods

Your benefits with Sage X3 for Services

Overview and improved administration of project risks

- Project definition and administration directly in Sage X3
- Fast response times and management of risks

Project administration and tracking

- Project management from quotation through to invoicing
- Key performance indicators and dashboards

Maximised resource productivity

- Improved resource planning and utilisation of labour in projects
- Streamlined cooperation and communication

Improved margins

- Simple control of costs and cost planning
- Control over operating costs

Simplified confirmation

- Easier confirmation of actual times and expenditure in projects

Financial control

- Control over costs and margins across all project phases
- Improved overview of activities and margins
- Link to financial accounting in Sage X3

Overview of your maintenance service calls, automatic calculation of costs and invoicing

- Administration of recurring services, e.g. maintenance service calls
- Definition of milestones for invoicing

"The Sage X3 Project and Job Costing module was exactly what we were looking for. None of Sage's competitors were able to offer such a complete and tailored solution."

Catherine Bacconnier, IT Director and Project Manager, ACOEM

Project management with Sage X3

From time pressure to missing information, lack of transparency and limited controlling options - a project can very quickly spiral out of control! Sage X3 helps your company manage its projects professionally and successfully. It relieves you of the burden of routine administrative tasks and provides support with budgeting, implementation and evaluation.

Time is money - in particular in project work

To help you save valuable time, Sage X3 supports profitability analysis and ensures structured and coordinated management of projects from the very start.

The success of a project is decided by professional project management

Reap the benefits of software support to structure your projects and break them down into sub-projects and individual project steps.

Flexibility beyond project borders

Sage X3 does not consider projects in isolation. It allows you to assign conditions, services and much more flexibly to different projects. This flexibility even extends to invoicing criteria – from flat-rate prices, to time-based calculations, automatic or manual.

Visibility is key

Sage X3 provides you with a clear and structured view of your projects. Showing scheduled services and deadlines at a glance, as well as any third-party services required for individual project steps. The software also allows the option of showing a separate internal and external view of the project.

360-degree transparency for added security

From Project Manager to Chief Financial Officer or CEO: Sage X3 offers graphic evaluations to provide you with the important information you need on project progress, completion of individual steps and financial factors.

A single control centre for all tasks

With Sage X3, you enter your data just once in a single central database. The system then manages all information, including purchase and sales invoices.

Project management highlights

- Profitability analysis to evaluate completed projects
- Structured project organisation based on sub-projects and steps
- Assignment of costs, prices, services and external suppliers to individual project steps
- Resource planning, maximising skills and workloads
- Management of teams and assignment of tasks
- Individual graphical analysis
- Confirmation of actual times and costs in a web interface
- Clear overview of individual projects or services
- Automatic monitoring of deadlines
- Information on anticipated sales, costs and margins for each service
- Transparent view of the project as a whole, or at a sub-project level, with regard to sales, profits and budgets as well as processing status

Sage ERP X3 ★ Projects Service requests Service responses Service contracts Customers Suppliers Dimension balances Accounts by dimension Budget calculation Inquiry

Open service requests

Service request	Customer	Service caller
SRQFR0110002		
SRQES0110004		
SRQES0110003	1	
SRQAU0110001	AU003	

Service requests ALL : Standard MODEL

Site: AU011 Internal chrono / customer: SRQAU0110001 Customer: AU003

Service caller: [Search]

Customer: AU003 JB Lee

Contact (relationship): AU00000903 Mr Doohan Mick

Description Base Management Invoice Elements Consumptions Invoicing

Title: Support for installation and Set-Up

Please consider travel times and documentation

SOURCE

Request open on: 03/28/14 Time: 08:23

by: [Search]

Document no.: [Search]

Source: Manual creation

Line: 0

STATISTICAL GROUPS

Service request stat group no.1: 040 [Search]

Service request stat group no.2: 042 [Search]

Service request stat group no.3: A1 [Search]

Service request stat group no.4: X [Search]

Service request stat group no.5: X [Search]

Close page

New

Save

Create

Delete

Cancel

Contract

Order

Service response

Invoice

Functions

Solution search

Service response history

Status history

Escalation history

Default coverage

View the solution

View the invoice

Actions

Plan

Service response

Appointment

Tel. call

Task

Save

Service response

Warranty request

Project

Appointment

Tel. call

Task

Options

Transaction

Journal traceability

Windows taskbar: 11:04 15.06.2015

Services and maintenance with Sage X3

Delays in invoicing? Missed maintenance service calls? Companies that provide and invoice high numbers of recurring services and maintenance tasks need a solution to support their organisation and scheduling.

Starting with professional contract management

Sage X3 structures the individual components of your contracts according to different calculation cycles for recurring services and conditions. The solution manages different maintenance intervals, such as checking devices, replacing spare parts or replenishing consumables, and automatically coordinates on-site calls.

Including device management

The Sage X3 device management feature lets you see, at a glance, which rental equipment is currently with each customer.

Immediate invoicing

Sage X3 calculates the costs of maintenance service calls according to contractual terms and generates invoices immediately. Making the days of lost or delayed invoices a distant memory.

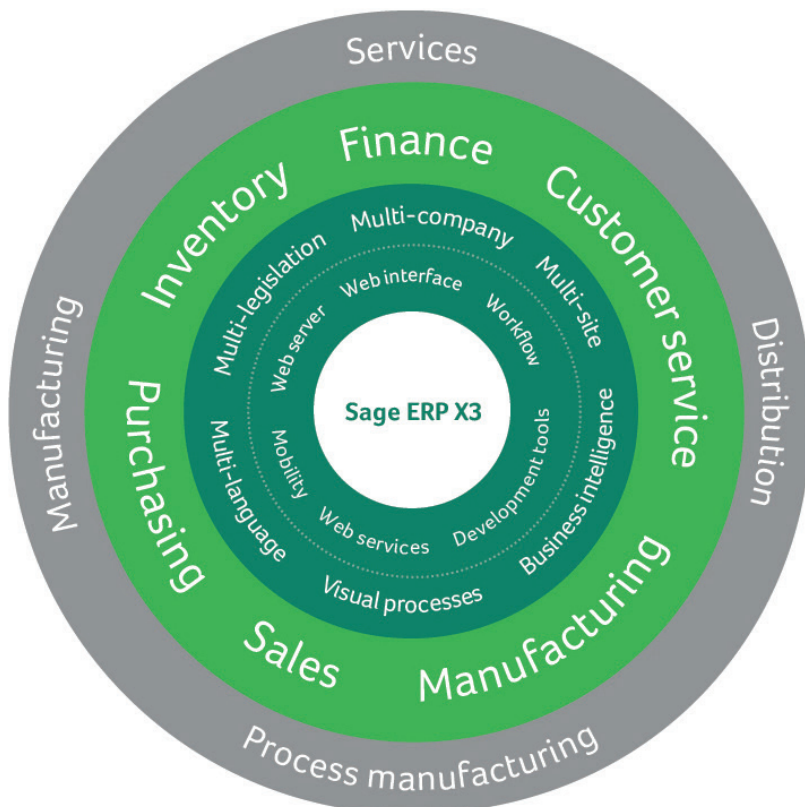
Services and maintenance Highlights

- Contracts broken down into sub-contracts with different calculation cycles and conditions
- Calculation of recurring services and contracts
- Control over different maintenance intervals
- Automatic coordination of maintenance service calls
- Clear administration of all rental devices
- Automatic calculation of costs and invoicing
- Shorter processing periods and reduced cycle times

Sage X3

A global ERP solution for medium-sized companies

Sage X3 improves your company's efficiency and gives your employees access to the specific information they need, precisely when they need it. Whether you're at your desk in the office or accessing information remotely from a tablet computer or smartphone – Sage X3 provides you with the tools you need to reduce costs, boost sales and win new customers – locally and globally.



■ Applications
■ Platform

Additional country-specific features are also available.

"We now have a single tool covering all our locations, allowing us to access the consolidated real-time information we need for improved management control."

Michel Vigier,
IT Manager, Iserba

Seven ways Sage X3 can help your business grow

1

Achieve more in less time

An intuitive web interface that can be easily customised to individual preferences helps to boost your productivity and ensure faster integration.

5

Improve your response to customer requirements

Faster and easier access to key information allows your employees to respond more quickly to customer enquiries.

2

Work from any location and at any time

Access your data remotely from mobile devices and view stock, enter customer orders, approve purchases and check key performance indicators.

6

Increase your cash flow and invest in growth

Optimise your cash flow and free up capital to invest in your company's growth – thanks to a solution that guarantees across-the-board monitoring of costs, helping you to continuously increase your profits.

3

Bring your business processes back under control

Eliminate inefficient processes; ensure compliance with laws and regulations and streamline your operations thanks to end-to-end integration of business processes and automation of workflows.

7

Ramp up capacity and expand into new markets or countries

Ramp up your capacity, implement new processes, manage new business units or tap into potential in new regions thanks to a flexible ERP solution to support your growth and take your business into the international arena.

4

The information you need – precisely when you need it

Assess risks and monitor your company's performance in real time using dashboards, self-service business intelligence and reporting tools.



About Sage

Sage energises the success of businesses and their communities around the world through the use of smart technology and the imagination of our people. Sage has reimaged business and brings energy, experience and technology to inspire our customers to fulfil their dreams. We work with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners and developers who drive the global economy. Sage is a FTSE 100 company with 14,000 employees in 24 countries.

For more information, visit www.sage.com

Sage X3

Sage X3 is Sage Group's global ERP solution for mid-sized companies and subsidiaries of large groups with international demands. For over 10 years Sage X3 has been a proven and comprehensive ERP solution addressing mid-market companies' specific requirements and challenges in industries from manufacturing and services, to distribution and many more. 5,100 customers in 100+ countries worldwide have chosen Sage X3 because helps companies grow forward with faster, simpler and flexible ERP.

For further information, please visit www.sage.co.uk/x3

For more information, visit www.sageerpx3.com

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