

A man with glasses and a beard, wearing a dark t-shirt and a grey apron with a brown leather pocket, is standing in a grocery store's produce section. He is looking at a display of fresh vegetables, including large heads of lettuce, and his right hand is reaching out to touch one of the lettuce heads. The shelves are filled with various fresh produce items like carrots, broccoli, and leafy greens. The background shows more shelves of packaged goods.

Sage X3

Customer
Learning
Curriculum

January 2018



Learn. Support. **Grow with Sage U.**

Build my skills on Sage X3: Customer Learning that helps you succeed

Whether you are a new Sage X3 user or an experienced user looking for training on what's new or advanced learning, Sage University is the right place for you. With training options that are affordable and convenient, there are so many ways to learn.

Instructor-Led Virtual

Designed for users who want a step-by-step how-to. With this objective in mind, you get to practice using the software, while completing exercises.

Private Training

Sessions are curriculum and training plans designed specifically for your organization delivered onsite or online.

Job Role

Available with recommended courses that best fits what you do for your organization.

User Certifications

Allows you to stand out from the crowd and be recognized for your knowledge by obtaining a certification with Sage.

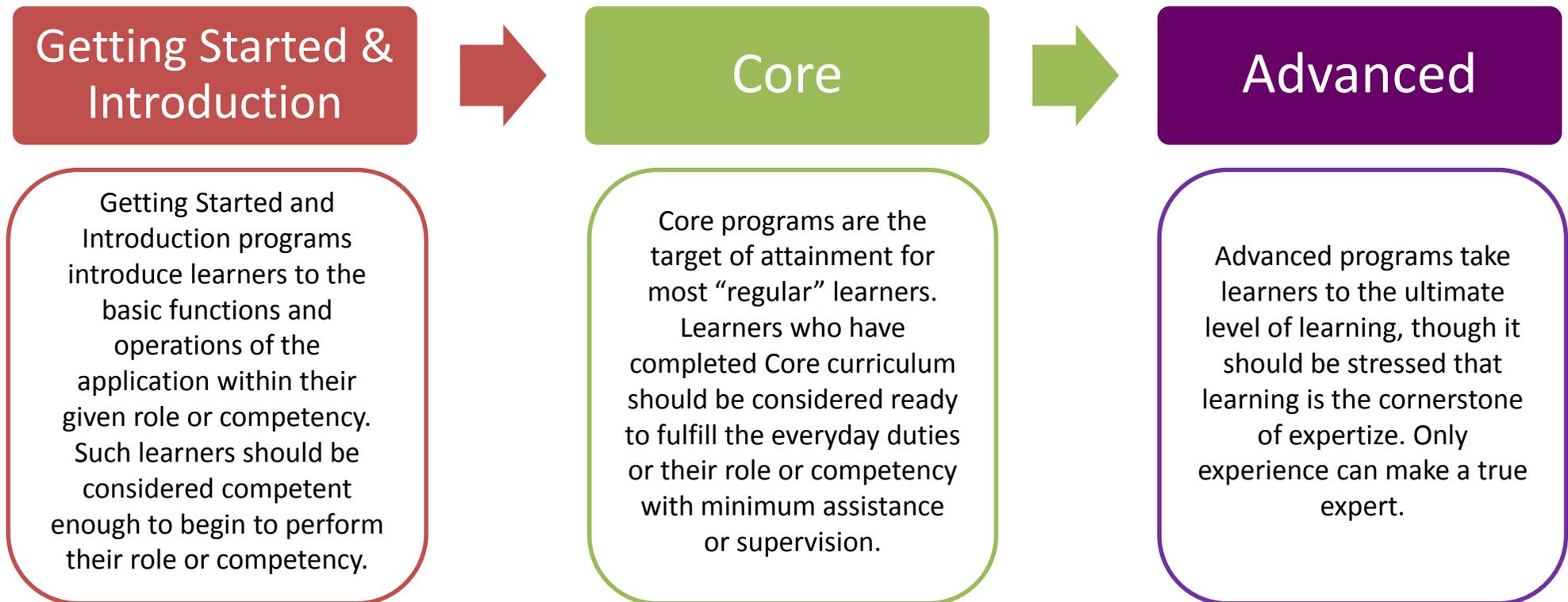
eLearning

Self-paced recorded videos available whenever you are. Ideal for learning new concepts or acquaint new hires with basics of Sage X3.



Sage X3 – The Customer Learning Curriculum

The Sage X3 Curriculum has 3 sections to help you navigate straight to the knowledge you need: Getting Started, Core, and Advanced.



Sage X3 Role-based Learning Paths

We created training based on your specific role, but then took it one step further and broke down the training into the phases that may represent where you are with your knowledge of Sage X3.

Roles



Getting Started & Introduction



Core Curriculum



Advanced Curriculum

Accounting Manager



Getting Started: eLearning curriculum

These free-to-access videos will provide you with a valuable overview of Sage X3 and functional areas within the program.

[See more details here](#)

Introduction and Overview: Financial and Distribution

This course will be run over 2 days Virtual instructor led.

[See more details here](#)

Accounting Manager Fundamentals

This course will be run over 2 days Virtual instructor led.

[See more details here](#)

Accounts Receivable Fundamentals

This course will be run over 6 hours Virtual instructor led

[See more details here](#)

Accounts Payable Fundamentals

This course will be run over 6 hours Virtual instructor led

[See more details here](#)

Processing Year-End

This course will be run over 2 hours Virtual instructor led

[See more details here](#)

Auto Journals

This course will be run over 4 hours Virtual instructor led

[See more details here](#)

Operating Budgets

This course will be run over 5 hours Virtual instructor led

[See more details here](#)

Fixed Assets

This course will be run over 5 hours Virtual instructor led

[See more details here](#)

Financial Data Extractor

This course will be run over 5 hours Virtual instructor led

[See more details here](#)

Sage Intelligence Financials

This course will be run over 2 days Virtual instructor led

[See more details here](#)

Accounts Payable Specialist



Getting Started: eLearning curriculum

These free-to-access videos will provide you with a valuable overview of Sage X3 and functional areas within the program.

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Introduction and Overview: Financial and Distribution

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[See more details here](#)

Accounts Payable Fundamentals

This course will be run over 6 hours Virtual instructor led

[See more details here](#)

Sage X3 Learning Paths

The Sage Customer Program makes it easy to get the knowledge you need to increase your success. Follow these simple learning paths to gain new Sage X3 skills, grow your revenues, and provide winning customer experiences.

Roles



Getting Started



Core Curriculum



Advanced Curriculum

Accounts Receivable Specialist



Getting Started: eLearning curriculum

These free-to-access videos will provide you with a valuable overview of Sage X3 and functional areas within the program.

[See more details here](#)

Introduction and Overview: Financial and Distribution

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[See more details here](#)

Accounts Receivable Fundamentals

This course will be run over 6 hours Virtual instructor led

[See more details here](#)

Customer Service



Getting Started: eLearning curriculum

These free-to-access videos will provide you with a valuable overview of Sage X3 and functional areas within the program.

[See more details here](#)

Introduction and Overview: Financial and Distribution

This course will be run over 2 days Virtual instructor led.

[See more details here](#)

Managing After-Sales Services

This course will be run over 5 hours Virtual instructor led

[See more details here](#)

Managing Leads and Prospects

This course will be run over 5 hours Virtual instructor led

[See more details here](#)

Developer



Getting Started: eLearning curriculum

These free-to-access videos will provide you with a valuable overview of Sage X3 and functional areas within the program.

[See more details here](#)

Introduction and Overview: Financial and Distribution

This course will be run over 2 days Virtual instructor led.

[See more details here](#)

Development Basics

This course will be run over 5 days Virtual instructor led

[See more details here](#)

Web Services

This course will be run over 3 days Virtual instructor led

[See more details here](#)

Sage X3 Learning Paths

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Roles



Getting Started



Core Curriculum



Advanced Curriculum

Manufacturing Specialist



Getting Started: Introduction to Sage X3

This free-to-access eLearning course contains videos providing you with a valuable overview of Sage X3.

[See more details here](#)

Introduction and Overview: Manufacturing

This course will be run over 5 hours Virtual instructor led.

[See more details here](#)

Manufacturing Specialist

This course will be run over 3 days Virtual instructor led

[See more details here](#)

Production Scheduler Fundamentals

This course will be run over 3 days Virtual instructor led

[See more details here](#)

Manufacturing Configurator

This course will be run over 6 hours Virtual instructor led

[See more details here](#)

Project and Job Cost Management Specialist



Getting Started: Introduction to Sage X3

This free-to-access eLearning course contains videos providing you with a valuable overview of Sage X3.

[See more details here](#)

Introduction and Overview: Financial and Distribution Users

This course will be run over 2 days Virtual instructor led.

[See more details here](#)

Project Management Fundamentals

This course will be run over 3 days Virtual instructor led

[See more details here](#)

Purchasing Specialist



Getting Started: Introduction to Sage X3

This free-to-access eLearning course contains videos providing you with a valuable overview of Sage X3.

[See more details here](#)

Introduction and Overview: Financial and Distribution Users

This course will be run over 2 days Virtual instructor led.

[See more details here](#)

Purchasing Fundamentals

This course will be run over 2 days Virtual instructor led

[See more details here](#)

Sage X3 Learning Paths

The Sage Customer Program makes it easy to get the knowledge you need to increase your success. Follow these simple learning paths to gain new Sage X3 skills, grow your revenues, and provide winning customer experiences.

Roles



Getting Started



Core Curriculum



Advanced Curriculum

Reporting and Analytics: Sage Enterprise Intelligence



Getting Started: Introduction to Sage X3

This free-to-access eLearning course contains videos providing you with a valuable overview of Sage X3.
[See more details here](#)

Introduction and Overview: Financial and Distribution

This course will be run over 2 days Virtual instructor led.
[See more details here](#)

Getting Started with the Basics

This course will be run over 5 hours Virtual instructor led.
[See more details here](#)

Using the SEI Add in for Excel

This course will be run over 5 hours Virtual instructor led.
[See more details here](#)

Report Designer

This course will be run over 4 hours Virtual instructor led.
[See more details here](#)

Formatting, Filtering and Sorting

This course will be run over 3½ hours Virtual instructor led.
[See more details here](#)

Administration and Security

This course will be run over 5 hours Virtual instructor led.
[See more details here](#)

OLAP Manager

This course will be run over 3½ hours Virtual instructor led.
[See more details here](#)

Reporting and Analytics: Other



Getting Started: Introduction to Sage X3

This free-to-access eLearning course contains videos providing you with a valuable overview of Sage X3.
[See more details here](#)

Introduction and Overview: Financial and Distribution

This course will be run over 2 days Virtual instructor led.
[See more details here](#)

Crystal Reports Basics

This course will be run over 2 days Virtual instructor led.
[See more details here](#)

Financial Data Extractor

This course will be run over 5 hours Virtual instructor led.
[See more details here](#)

Sage Intelligence Financials

This course will be run over 2 days Virtual instructor led.
[See more details here](#)

Sage X3 Learning Paths

The Sage Customer Program makes it easy to get the knowledge you need to increase your success. Follow these simple learning paths to gain new Sage X3 skills, grow your revenues, and provide winning customer experiences.

Roles



Getting Started



Core Curriculum



Advanced Curriculum

Sales Specialist



Getting Started: Introduction to Sage X3

This free-to-access eLearning course contains videos providing you with a valuable overview of Sage X3.

[See more details here](#)

Introduction and Overview: Financial and Distribution

This course will be run over 2 days Virtual instructor led.

[See more details here](#)

Sales Fundamentals

This course will be run over 2 days Virtual instructor led

[See more details here](#)

Stock Specialist



Getting Started: Introduction to Sage X3

This free-to-access eLearning course contains videos providing you with a valuable overview of Sage X3.

[See more details here](#)

Introduction and Overview: Financial and Distribution

This course will be run over 2 days Virtual instructor led.

[See more details here](#)

Stock Fundamentals

This course will be run over 2 days Virtual instructor led

[See more details here](#)

System Administrator



Getting Started: Introduction to Sage X3

This free-to-access eLearning course contains videos providing you with a valuable overview of Sage X3.

[See more details here](#)

Introduction and Overview: Financial and Distribution

This course will be run over 2 days Virtual instructor led.

[See more details here](#)

System and Administrator Essentials

This course will be run over 3 days Virtual instructor led

[See more details here](#)

Sage X3 Getting Started Courses

Welcome to our library of Sage X3 Getting Started eLearning courses. These free-to-access videos will provide you with a valuable overview of Sage X3 and functional areas within the program. These eLearning courses are currently only offered in English.

Introduction to Sage X3 (50 mins)

This eLearning course includes multiple videos introduces you to Sage X3, including how to access, an overview of the architecture and file structure. You will also become familiar with common navigational pages and features.

Recommended for all learning paths

Using the Solution – Common Data (2 hours)

This eLearning course includes multiple videos teaching you the common data and records that are foundational to the entire Sage X3 system. From setting up a new company, understanding how multi-legislation is configured, basic transaction process flow, and an overview of the financial setup and common records used throughout your Sage X3 solution. This course is your first step in getting started with Sage X3.

Recommended for all learning paths

Using the Solution – Financials (3 hours)

This eLearning course includes multiple videos teaching you how to get started with the financial functionality of Sage X3, including the general ledger account structure and transactions, an overview of common accounts receivable and payable processes, and basics of financial reporting capabilities.

Recommended for the following learning paths:

- Accounting Manager
- Accounts Payable Specialist
- Accounts Receivable Specialist

Using the Solution – Distribution (5 hours)

In this course you will learn common set up and transactions of the stock management, purchasing, and sales processes in Sage X3. This will include how to set up customers, suppliers, and products, an overview of processes performed in each area, and how they work together in moving stock throughout your distribution solution.

Recommended for the following learning paths:

- Purchasing Specialist
- Stock Specialist
- Manufacturing Specialist

Using the Solution – Manufacturing (5 hours)

This eLearning course includes multiple videos teaching you common set up and transactions of the stock management, purchasing, and sales processes in Sage X3. This will include how to set up customers, suppliers, and products, an overview of processes performed in each area, and how they work together in moving stock throughout your distribution solution.

Recommended for the following learning paths:

- Manufacturing Specialist

Using the Solution – Project Management (50 mins)

This eLearning course provides you with an overview of the Project Management module, to understand key concepts, and obtain base knowledge prior to attending the Project Management Fundamentals course. Learn basics for creating projects, managing project tasks and budgets, entering time against projects, impact to financials, and project management integrations.

Recommended for the following learning paths:

- Project and Job Cost Management Specialist

Sage X3 Getting Started Courses

Welcome to the Sage X3 Getting Started our instructor-led training courses. These hands-on courses provide you with a valuable overview of Sage X3 and functional areas within the program.

Introduction and Overview: Financial and Distribution

This hands-on course will introduce and explain the principles, process flows and supporting configuration in Sage X3. You will have an understanding of how key functions are setup and configured for Finance and Distribution in Sage X3.

After completing this course, you will be able to:

- Log onto the program and understand how to navigate, search for information, and design your own landing pages
- Understand basic setup requirements for companies and sites
- Understand the role parameters play in setup
- Understand the transaction setup and flow of information as it is entered in the system
- Understand the stock, sales, and purchasing process flows
- Print reports and view inquiries

Course Details:

- Two 5-hour sessions
- Format: Instructor led, virtual
- This course is only offered in English

Introduction and Overview: Manufacturing

This hands-on course will introduce and explain the principles, process flows and supporting configuration in Sage X3. You will have an understanding of how key functions are setup and configured for Manufacturing in Sage X3.

After completing this course, you will be able to:

- Understanding manufacturing concepts and processes
- Use the manufacturing planning tools
- Set up manufacturing requirements
- Process material requirements planning
- Create work orders and perform allocations and scheduling
- Track the production process
- View and close work orders
- View actual costs compared to planned costs
- Determine the production cost of completed work orders

Course Details:

- One 5-hour session
- Format: Instructor led, virtual
- This course is only offered in English

Sage X3: Core Curriculum

Welcome to the Sage X3 Accounting Manager Fundamentals Course

Objectives

This course will provide a comprehensive overview of the key functions and features in Sage X3 related to the financial accounting role. You will learn how to establish charts of accounts and work with dimensions, understand how the organizational structure is defined, and use the key financial accounting functions for journal entries and inquiries. This course will also explain how transactions flow through Sage X3 and how to view related accounting documents, as well as how to perform period closings. In this session you will learn all of the critical features and functions necessary to perform financial accounting tasks in Sage X3.

What roles is this course for?

- Accounting Managers

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define company and site information
- Define fiscal years and periods
- Define the account plan, chart of accounts, dimensions and appropriate values
- Understand the setup options associated with analytical accounting in Sage X3
- Understand how ledgers are updated, including the general ledger
- Enter transactions directly in Financials including journal entries, reversing entries, simulations, and allocation transactions
- Understand the final validation process for journal entries
- Understand the purpose of financial data extraction and how to use the tools available to create financial reports
- Set up information for intercompany transactions and enter an intercompany journal entry and customer/supplier invoice
- Understand the functions associated with closing a period and year in Financials

Course Details:

- Two 5-hour sessions
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Core Curriculum

Welcome to the Sage X3 Accounts Receivable Fundamentals Course

Objectives

In this course, you will gain a comprehensive overview of the key functions and features in Sage X3 related to the Accounts Receivable role. You will learn how to define related A/R parameters, work with business partner and customer records, and enter sales and miscellaneous invoices. This session will also provide instruction on managing customer payments and entering deposits, working through bank reconciliations, and processing routine monthly tasks like customer statements and reminders.

What roles is this course for?

- Accounting Managers
- Accounts Receivable Specialists

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define specific parameters such as payment terms and payment attributes
- Enter and manage BPs and customers
- Enter customer invoices and recurring invoices
- Understand the setup requirements for intercompany transactions and enter intercompany invoices
- Enter sales invoices and generate direct order invoices deliver invoices
- Enter customer and sales credit memos
- Enter customer payments and create automatic remittances
- Create customer statements and reminders and create reminder campaigns
- Create a manual reconciliation, reconcile bank entries, and reverse a reconciliation

Course Details:

- One 6-hour session
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Core Curriculum

Welcome to the Sage X3 Accounts Payable Fundamentals Course

Objectives

In this course, you will gain a comprehensive overview of the key functions and features in Sage X3 related to the Accounts Payable role. You will learn how to define related A/P parameters, work with business partner and supplier records, and enter purchase and miscellaneous invoices. This session will also provide instruction on managing supplier payments and processing check runs, working through bank reconciliations, and processing routine monthly tasks like employee expenses.

What roles is this course for?

- Accounting Managers
- Accounts Payable Specialists

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define specific parameters such as payment terms and payment attributes
- Enter and manage BPs and suppliers
- Enter supplier invoices associated with a purchase order and recurring invoices
- Understand the setup requirements for intercompany transactions and enter intercompany invoices
- Manage and enter purchase invoices and credit memos received from a supplier
- Manage and enter supplier payments including viewing the Cash Requirements
- Generate automatic payment proposals
- Print and post checks
- Understand the 1099 setup options and view 1099 reports
- Track employee expenses and process expense reports
- Create a manual reconciliation, reconcile bank entries, and reverse a reconciliation

Course Details:

- One 6-hour session
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Core Curriculum

Welcome to the Sage X3 Processing Year-End Course

Objectives

In this course, you will learn the steps necessary to achieve a smooth year-end close. You will learn how to use available resources and established procedures to help you achieve a successful year-end close for your distribution and financial modules.

What roles is this course for?

- Accounting Managers

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Locate resource to assist you with year-end activities
- Open and close accounting periods to allow or prevent creation and posting of journal entries to those periods
- Perform a year-end simulation to run a trial balance for the new year
- Perform year-end closing to close the company's fiscal year and create the corresponding accounting entries
- Print all year-end reports

Course Details:

- One 2-hour session
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Core Curriculum

Welcome to the Sage X3 Managing After-Sales Services Course

Objectives

In this course, you will gain a comprehensive overview of the key functions and features to manage the after-sales services in the Customer Service module. You will learn about the customer support flow as it relates to creating service contracts, warranty vouchers and requests, call queues and skill groups. This course will also explain how to manage service requests from a customer including assigning service requests to specific individuals based on skills, how to record service responses, and define solutions.

What roles is this course for?

- Customer Service

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define service contract templates
- Define and view after-sales product information
- View and track service contracts, warranty vouchers, and requests
- Manage service requests including tracking the service requests, entering resolutions, and assigning to individuals

Course Details:

- One 5-hour session
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Core Curriculum

Welcome to the Sage X3 Managing Leads and Prospects Course

Objectives

In this course, you will gain a comprehensive overview of the key functions and features to manage Leads and Prospects in the Customer Service module. You will learn about the common data required for managing leads and prospects, assign leads and prospects to various sales staff according to their sector, initiate various after-sales flows related to sales, and create projects, tasks, and calls associated with specific leads and prospects.

What roles is this course for?

- Customer Service

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Create common data required for managing leads and prospects
- Create and manage leads and prospects, including how to convert a lead to a prospect
- Assign leads to sales reps based on criteria you define
- Manage sales actions including defined projects and creating tasks, calls, appointments, and resources
- View and generate an overall calendar of the various actions associated with an employee
- Create a quote for a project

Course Details:

- One 5-hour session
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Core Curriculum

Welcome to the Sage X3 Development Basics Course

Objectives

In this course, you will learn how to use the development tools in Sage X3 including how to create your own windows, screens, objects, and functions, modify existing processes, and use the Eclipse editor to write and debug code.

What roles is this course for?

- Developers creating customizations for their Sage X3 solution

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Configure the Domain Management application
- Understand the Sage X3 language including integers, strings, arrays, trace files, and boxes,
- Design tables, screens, and windows
- Use events and actions
- Debug and optimize Sage X3 code
- Use import templates
- Develop advanced functions

Course Details:

- Five 5-hour sessions
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Core Curriculum

Welcome to the Sage X3 Manufacturing Specialist Course

Objectives

In this course, you will learn about the essential manufacturing and production functions. Get hands-on experience setting up the manufacturing requirements and generating work orders based on MRP/MPS entries. You will also practice allocating work orders and viewing projected stock information, enter a work order, view a list of work orders, create a production bill of materials and perform a cost calculation rollup. These are just a few of the activities you will explore using realistic demonstration data in a hands-on environment.

What roles is this course for?

- Manufacturing specialists responsible for setting up and maintaining manufacturing and production processes for your organization

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Manufacturing course

Course Value

After completing the course, you will be able to:

- Understand manufacturing concepts and processes
- Understand and use the manufacturing planning tools
- Define categories, products, product sites, costing dimensions, and work centers for manufacturing
- Use the material requirements planning (MRP) and master production schedule (MPS) planning tools
- Work with enterprise planning and workbench tools, group orders, and view MPS and MRP inquiries and reports
- Create work orders and perform allocations and scheduling
- Understand capacity planning and how load affects capacity, tools to recalculate the load, and view the load for a site and verify available capacity
- Track the production process
- View the work order status and close a work order
- View actual costs compared to planned costs
- Determine the production cost for a completed work order
- Understand tracking plans and how they are used to track time and materials

Course Details:

- Three 5-hour sessions
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Core Curriculum

Welcome to the Sage X3 Project Management Fundamentals Course

Objectives

In this course, you will learn how to set up the Project Management (PJM) feature. You will also learn how to use PJM to manage the full cycle of a project from the proposal creation to closure.

What roles is this course for?

- Manufacturing specialists responsible for setting up and maintaining manufacturing and production processes for your organization

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Using the Solution – Project Management (PJM) learning package included as prework for this course
- Attend the Sage X3 Stock Fundamentals course, or have working experience and knowledge of Sage X3 stock management and the distribution process flow, transactions, setup, and configuration

Course Value

After completing the course, you will be able to:

- Understand all functions involved in the project management module
- See how the project is used to initiate the existing business flow in Sage X3 regarding the sales, stock replenishment, and the analytical accounting
- Use the PJM features to manage the full cycle of a project from the proposal creation to the closure of the project
- Explain all functions involved in the Project Management module

Course Details:

- Three 6-hour sessions
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Core Curriculum

Welcome to the Sage X3 Purchasing Fundamentals Course

Objectives

In this course, you will gain a comprehensive overview of the key functions and features in Sage X3 related to the Purchasing role. You will learn how to work with common data settings for suppliers and products, define purchase pricing, and enter purchasing transactions. This course will also provide instruction on how to use inquiry screens for purchase optimization, and how to work with purchasing workflows for signature management. In this session you will learn all of the critical features and functions necessary to perform Purchasing tasks in Sage X3.

What roles is this course for?

- Purchasing Specialists

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define setting for such items as suppliers and products used in purchasing
- Set up and define purchase pricing information including structure, reason, and parameters
- Enter price information and activate price lists
- Enter a quote
- Enter various types of orders included purchase orders, contract orders, direct orders, and inter-site/inter-company orders
- Understand how the purchasing signature management process affects how orders are entered and processed
- Define standard workflow rules for use with purchasing signature management

Course Details:

- Two 5-hour sessions
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Core Curriculum

Welcome to the Sage X3 Sales Fundamentals Course

Objectives

In this course, you will gain a comprehensive overview of the key functions and features in Sage X3 related to the Sales role. You will learn how to work with common data settings for customers and products, define price lists, and enter sales transactions. This course will also provide instruction on how to inquire on sales transactions, and how to work with sales workflows for signature management.

What roles is this course for?

- Sales Specialists

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define setting for such items sales sites, customers, and products used in the sales process
- Set up and define sales pricing information including structure, reason, and parameters
- Enter price information and activate price lists
- Enter a quote
- Enter various types of orders included normal orders, contract orders, direct orders, and inter-site/inter-company orders
- Understand how the sales signature management process affects how orders are entered and processed
- Define standard workflow rules for use with sales signature management

Course Details:

- Two 5-hour sessions
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Core Curriculum

Welcome to the Sage X3 Stock Fundamentals Course

Objectives

In this course, you will gain a comprehensive overview of the key functions and features in Sage X3 related to Stock Management. You will learn how to establish inventory records and define products, work with valuation and costing parameters, and perform routine stock transactions for movements and counts. This course will also provide instruction on how the Stock Management role affects Purchasing and Sales roles by managing receiving and shipment functions.

What roles is this course for?

- Stock Specialists

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Define settings specific to inventory including defining stock statuses, units of measure, and packages
- Understand and set up product lines
- Define information necessary for creating products including valuation methods, stock management rules, and product categories
- Create new products and modify existing product information
- Enter miscellaneous issues and receipts and inter-site transfers
- Assemble and disassemble a production bill of material
- Receive products from a purchase order
- Allocate and ship products to a customer

Course Details:

- Two 5-hour sessions
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Core Curriculum

Welcome to the Sage X3 Security and Administrator Course

Objectives

In this course, you will learn about the essential system administrator functions. Get hands-on experience creating and modifying security users, profiles, modifying pages using the authoring tools, and how to optimize database performance.

What roles is this course for?

- Administrators responsible for setting up and maintaining security in Sage X3
- Administrators responsible for managing the database and performance of a company's system

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course

Course Value

After completing the course, you will be able to:

- Understand security in Sage X3 and create users
- Understand folders and set up endpoints
- Understand the patch integration process and tools
- Understand the data import/export tools and capabilities
- Configure and use the Batch Server to process tasks and requests
- Create and use Process Flows
- Create and use Workflow rules and notifications
- Understand the Microsoft Office integration and collaboration tools
- Understand the Authoring function and how to use them

Course Details:

- Three 5-hour sessions
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Advanced Curriculum

Welcome to the Sage X3 Production Scheduler Course

Objectives

In this course, you will learn about the main benefits of using the production scheduler solution. You will also learn about the working principles of the tools, watch the solution in a demonstration, and see the main screens in order to become familiar with the user interface.

What roles is this course for?

- Manufacturing specialists wanting to expand their Sage X3 Manufacturing capabilities by utilizing Production Scheduler.

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Product Scheduler topics in the What's New in Version 11 eLearning course
- Attend the Manufacturing Specialist course

Course Value

After completing the course, you will be able to:

- Know the benefits of the production scheduler
- Understand the data exchange between Sage X3 and the production scheduler
- Be familiar with the productions scheduler user interface
- Know how to setup PlannerOne manager
- Understand the automatic scheduling process

Course Details:

- Three 6-hour sessions
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage X3: Advanced Curriculum

Welcome to the Sage X3 Web Services Course

Objectives

In this course, you will learn the from beginning to end how to set up and integrate web services between Sage X3 and your application. You will learn what web services are and the best practices and limitations of implementing web services.

What roles is this course for?

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

Recommended Prerequisites

Prior to attending the course, attendees should:

- Review the Sage X3 – Getting Started: Introduction to Sage X3 eLearning course
- Attend the Introduction and Overview: Financial and Distribution course
- Attend the Development Basics course

Course Value

After completing the course, you will be able to:

- Understand what web services are and how to link to them in a Sage X3 solution
- Understand web services architecture and how the web server publishes web services and processes a request
- Set up web services in the SAFE X3 management console
- Set up connection pools for managing waiting queues for web service requests
- Publish subprograms and objects such as sales orders and products in order to make them accessible to external applications through the Internet
- Understand how to define a project team for developing the integration including estimating workloads, third party application development, unit testing, and final development
- Understand tips and best practices for testing and troubleshooting the integration

Course Details:

- Three 5-hour sessions
- Format: Instructor led, virtual
- This course is only offered in English

For course learning paths, click [here](#)

Sage Enterprise Intelligence Courses

Welcome to our library of Sage Enterprise Intelligence (SEI) for Sage X3 training courses. Attend these courses to build your skills with webinars and training on specific Sage Enterprise Intelligence for Sage X3 features and functionality:

SEI - Getting Started with the Basics (5 hours)*

Attend this webinar to learn about the Sage Enterprise Intelligence report and analysis tool. This course provides a high level overview and will help you quickly get started using the basic functions and features.

SEI - Using the SEI Add in for Excel (5 hours)*

Attend this webinar to learn about the Sage Enterprise Intelligence (SEI) Addin for Excel. This addin allows you to access real-time information within Excel from your ERP database.

SEI - Report Designer (4 hours)*

Attend this webinar to learn how to create and customize dynamic operational and financial reports using the Report Designer in Sage Enterprise Intelligence. This includes accessing existing reports and creating new reports, importin SEI worksheets into reports, and customizing report's to meet a company's specific needs.

SEI - Formatting, Filtering and Sorting (3hrs 30 min)*

Attend this webinar to learn how to customize data views in Sage Enterprise Intelligence (SEI). You will learn how to format columns in a view and advanced techniques for filtering, customizing fields, and creating rules based on certain conditions for more efficient and tailored views of your data.

SEI - Administration and Security (5 hours)*

Attend this webinar to ensure business processes run smoothly and securely on your Sage Enterprise Intelligence (SEI) system. This includes determining what can be viewed, deleted, or modified by all users on the system. You will also learn how to set up the business processes used by other users of the system and set up distribution reports.

SEI - OLAP Manager (3hrs 30 min)*

Attend this webinar to learn about the key components of OLAP and how to use the OLAP Manager to create multi-dimensional views of data in SEI. You will also learn how to work with cubes and populate tables through the use of stored procedures/templates.

***This course is only offered in English**

Additional Courses

Welcome to our library of Sage X3 learning opportunities. Attend these courses to build your skills with webinars and training on specific Sage X3 features and functionality:

Operating Budgets (5 hours)*

Attend this webinar about operating budgets in Sage X3 including how to create a budget structure, activate and approve the workflow, manage by product, envelope, year and lines, and finally view key inquiries and reports related to operating budgets.

Automatic Journals (4 hours)*

Attend this webinar to learn the structure of and how to configure and use Auto Journals. You will learn best practices for customizing to your needs, including using accounting codes. Also covered are the most commonly used auto journals you may want to consider implementing in Sage X3.

Fixed Assets – (5 hours)*

Attend this webinar to learn about Sage X3 Fixed Assets. You will be introduced to Fixed Assets including information on the setup requirements, functions and features, and how to add and manage asset records and calculate depreciation.

Manufacturing Configurator (5 hours)*

Attend this webinar to learn how to use the Configurator module in the manufacturing process. This includes usage and methodology, product lines, options and variants, costing, running scripts, entry mode, running automatic configurator, and tools used in defining the configurator scenario details.

Sage Intelligence: Financials (Two - 4 hour sessions)*

Attend this webinar to obtain hands-on practice modifying and creating financial reports using the Sage Intelligence Report Designer. You will learn how to use both the Layout Generator and the Task Pane.

Crystal Reports Basics – (Two 5-hour sessions)*

Attend this webinar to about custom report design using Crystal Reports for Sage X3. In this course, you will learn how to design reports in Crystal Reports and how to add reports to folders and run within Sage X3.

Financial Data Extractor – (5-hours)*

Attend this webinar to learn how to easily design and generate company specific financial statements and inquiries using Financial Data Extractor in Sage X3. In this hands-on course you will create a financial statement by defining the appropriate parameters and calculations required to generate the report.

Using the Solution – Project Management (PJM) (50 mins)*

This eLearning course includes multiple videos providing you with an overview of the Project Management module, to understand key concepts, and obtain base knowledge prior to attending the Project Management Fundamentals course. Learn basics for creating projects, managing project tasks and budgets, entering time against projects, impact to financials, and project management integration.

***This course is only offered in English**

About Sage

Sage is the market leader for integrated accounting, payroll, and payment systems, supporting the ambition of the world's entrepreneurs. Sage began as a small business in the U.K. 30 years ago, and over 13,000 colleagues now support millions of entrepreneurs across 23 countries as they power the global economy. We reinvent and simplify business accounting through brilliant technology, working with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners, and developers.

And as a FTSE 100 business, we are active in supporting our local communities and invest in making a real difference through the philanthropy of the Sage Foundation.

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For more information, visit www.sage.com



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