ELECTRONIC DOCUMENT MANAGEMENT (EDM)

New in Sage ERP X3 Version 6.5

Sage ERP X3 Version 6.5 introduced new document management functionality designed to help you capture, monitor, and manage the flow of internal and external business documents. Let’s take a closer look at electronic document management (EDM) and electronic document distribution (EDD) and how these new features can benefit your company.

Reduce Paper and Operational Costs

Sage ERP X3 and EDM makes paper a thing of the past with the ability to easily capture, view, edit, and attach documents to Sage X3 records/transactions using OCR (Optical Character Recognition) technology.

Incoming documents (like vendor invoices or customer contracts for instance) are scanned, indexed using numbers/keywords found in the document, and automatically associated to the appropriate Sage X3 records. Once digitized and stored, you can efficiently search for and distribute these archived documents as needed via “Attachments” or the new “Documents” button. And since they can be associated with Sage X3 transactions, these paper documents are easier to find and reference in the context of your regular workflow, transaction processing, and analysis. When authorized to do so, even non-ERP users can drag and drop documents into the system using a folder on their desktop.

Improve Document Distribution and Sharing

Electronic Document Delivery (EDD) is also available, giving you the ability to automatically email or fax system-generated documents such as invoices or financial reports. When outside of the Sage ERP X3 system, employees can access company documents instantly through a new secure web-based portal. Plus, documents stored in the repository cannot be overwritten or deleted and document changes are automatically assigned a revision number.

Go Green to Save Some Green

Together, EDD and EDM turn Sage ERP X3 into a capable electronic document management application that’s available company-wide and can manage documents both inside and outside your ERP system. Not only will it result in hard cost savings on things like postage, paper, and physical storage space, these new features will reduce the profit-killing inefficiencies that are associated with filing and retrieving hard copies and chasing paper around the office. What’s more, these digitized document copies are easier to access across multiple locations.

Download the Electronic Document Management Brochure for more detail.

Got Questions? Be sure to contact us about Electronic Document Management (EDM) or Distribution (EDD) for Sage ERP X3 Version 6.5.
NexTec Employee Spotlight
Jorge Sedano
Senior Developer / Technical Consultant
Jorge has 20+ years of experience in analysis, design, develop and implementation of computer systems, in both Microsoft and Unix platforms. He holds a Bachelor’s degree in Management information Systems. In past jobs his main focus was to customize and maintaining X3 implementations and Crystal/Business Objects reports design along with over ten years of experience in establishing EDI relationship with big chains like Lowes, Sears, & Wal-Mart.

Sage Summit 2013
Registration is Now Open!
The largest gathering of the year for Sage customers and business partners, the Sage Summit annual conference offers one-of-a-kind learning sessions, networking opportunities, expert guidance, and tips that will help you master your Sage ERP X3 software.

Sage Summit 2013 will be hosted in Washington, D.C. with customer events running from Tuesday July 21st to Friday July 26th. Go online to learn more about the location, agenda, and some seriously fun activities planned this year!

What to Expect
• Discussions on the most talked-about trends
• Opportunities to see and touch new technologies in the Expo
• Best practices to help you master your Sage solution
• One-of-a-kind collaborative activities that make networking fun
• Expert guidance from the kind of people you don’t run into every day

Location:
Gaylord National Resort and Convention Center  |  Washington, D.C.

http://na.sage.com/sage-summit >>>
P.S. Stop by and say hi to the NexTec team at the trade show in booth #1114
We recently saw the introduction of **Sage Inventory Advisor** - an affordable cloud-based application that is helping companies reduce excess inventory and working capital while eliminating stock-outs. Let’s take a closer look at this new and unique add-on solution for your Sage ERP X3 system.

**What is Sage Inventory Advisor?**
Sage Inventory Advisor is a web-based application that connects to your Sage ERP X3 data, crunches the numbers, and delivers a real-time health-check on your inventory. Leveraging the power of a sophisticated forecast engine, it delivers data and insight that helps determine the optimal investment required to achieve target fill rates.

**Decision-Making Tools and Monitoring**
The web-based dashboard provides a concise graphical snapshot that displays key performance indicators (KPIs) so you can quickly identify problem SKUs and then drill into the underlying data for deeper insight. Sage Inventory Advisor will also monitor inventory status and provide early warning for critical items such as inventory out of stock or near out of stock as well as excess and surplus orders.

You also benefit from other important data like supplier performance tracking, order scheduling so you know what to order and when, and order management to review and amend existing orders.

**The Business Benefits**
Some of the benefits of Sage Inventory Advisor include:

- Reduce excess inventory and carrying costs
- Free up cash that’s tied up in inventory
- Improve fill rates and eliminate stock-outs
- Reduce time spent crunching numbers and forecasting
- Cloud-based application that’s up and running in just a few hours with no hardware installation

**Complements Your Sage ERP X3 System**
It’s important to note that Sage Inventory Advisor does not replace your existing inventory module which is used to drive and manage day-to-day inventory transactions. Instead, it complements your existing functionality, adding advanced forecasting and planning features that work hand-in-hand with the supplier, inventory, sales, purchasing, and other information in your Sage X3 system.

Sage Inventory Advisor is offered as a monthly subscription service with the monthly rate determined by the number of SKUs.

**Want More Info?**
**Contact us** if you’d like to learn more about the new Sage Inventory Advisor.