

X3clouddocs

AUTOMATING BUSINESS

INBOUND AP
AP AUTOMATION



INBOUND SO
SALES ORDER AUTOMATION



OUTBOUND
DOCUMENT MANAGEMENT



WORKFLOW
EMAILS & NOTIFICATIONS



INBOUND AP

AP AUTOMATION

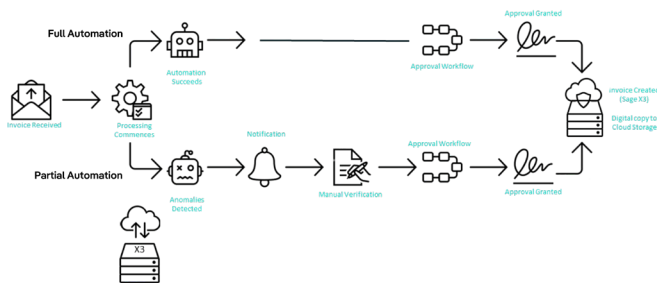


X3CloudDocs Inbound AP automates the accounts payable invoice process through machine learning and workflow automation.

How It Works

X3CloudDocs Inbound streamlines the AP process: from receiving an invoice (digitally or physically) to extracting the information and matching this against X3 data, to authorisations and posting.

- 01** Invoices are received and uploaded manually or automatically for processing.
- 02** Data is extracted from the invoice and matched to Sage X3 data (including 3-way matching).
- 03** If required, the invoice enters a validation and authorisation process.
- 04** Invoices are automatically created in Sage X3, with a copy of the original document securely stored in the cloud.



Functionality

X3CloudDocs Inbound drives efficiency in the AP process through automation, by leveraging deep integration to Sage X3 data and reducing manual interventions through machine learning. Making use of global invoice metadata, the solution can intelligently match invoice templates to documents, minimising the need for training and driving efficiency.



GL coding automation and line-level data extraction.



Automatic 3-way matching (PO, Receipt, & Invoice) and exception capture.



Hierarchical approval workflow routings and notifications.



Natively integrated to Sage X3, with bi-directional data synchronisation.

TRACEABILITY

Improves control with full digital audit trails and e-signature workflows to ensure compliance and control.

REMOTE WORK

Supports remote and hybrid working through digitisation of the AP process, from receiving the invoice through to approval.

SAVINGS

Saves time through automation to reduce manual interventions, data entry, and errors. Improves employees' working experience and reduces costs.

Benefits

X3CloudDocs Inbound enables valuable finance professionals to focus on value-add tasks, rather than repetitive, manual activities better suited to robots, driving improved employee satisfaction, reducing costs, and promoting compliant business processes through financial control and audit.

“ We now spend less time doing manual work. X3CloudDocs has truly made our AP processes very easy and efficient. ”

Senior Business Operations & ESG Manager, TransPak

INBOUND SO

Sales Order AUTOMATION



X3CloudDocs Sales Order Automation builds on the AP Automation tool (Inbound) making it possible to create Sales Orders from Purchase Order documents automatically.

How It Works

Purchase Orders can be received via e-mail or manually uploaded to X3CloudDocs. Data is extracted using OCR/TLX processing. Further validation is performed against master data uploaded from Sage X3. A Sales Order is then automatically created. A copy of the original document is stored in the cloud and can be viewed directly from Sage X3.

01

Purchase Orders (PO) are received and uploaded manually or automatically for processing.

02

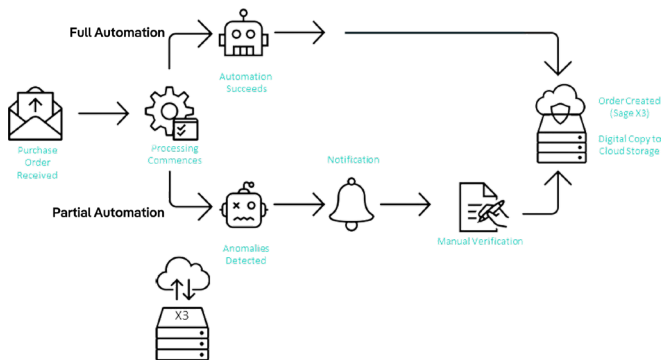
Data is extracted from the PO and matched to Sage X3 data.

03

If required, the PO enters a validation and authorisation process.

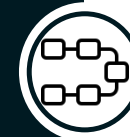
04

Order created in Sage X3, with a copy of the original document securely stored in the cloud.



Functionality

X3CloudDocs Inbound SO streamlines the Sales Order Creation process by automatically processing and verifying customer purchase orders and creating the Sales order in X3.



Duplicate PO checking



Multi-currency



Automatic Sales Order creation in Sage X3



TLX and OCR automatically extract relevant order information for processing

FLEXIBILITY

Receive customer orders from a variety of sources (email, drag & drop, folder automation).

Automation

Automatic notification of order receipts from customers & automatic or manual processing of customer orders, validated against Sage X3 data

COMPATIBILITY

Works with your current Sales Order approval and notification workflows in Sage X

SAVINGS

Saves time through automation to reduce manual interventions, data entry, and errors. Improves employees' working experience and reduces costs.

Benefits

X3CloudDocs Inbound Sales drives efficiencies in the sales department by automatically processing incoming customer orders removing the need for rekeying. Utilising a best-in-class enterprise-grade document and image processing engine coupled with AI and machine learning technology - customer orders are seamlessly converted into sales orders in Sage X3 without any manual intervention.

A best-in-class document and image processing engine means each customer can have their individual order document format and they don't have to change the way they interact with you meaning zero customer impact and a rapid ROI with no transition period.

OUTBOUND DOCUMENT MANAGEMENT



X3CloudDocs Outbound is a document management solution, natively integrated with Sage X3 to send, archive and access business-critical documents.

How It Works

X3CloudDocs Outbound intelligently sends business documents from Sage X3 to nominated contacts, securely archives them into a cloud store, and makes them easy-to-access for audit and daily use.

01

Documents are generated by Sage X3, or manually uploaded to the solution.

02

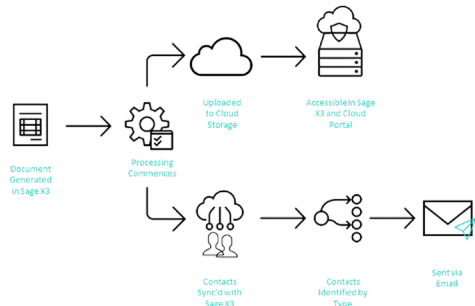
These are automatically, or manually, indexed and uploaded to cloud storage.

03

Where needed, the document is automatically emailed to a nominated contact.

04

Documents are visible in Sage X3 and via a web portal.



Cloud storage for X3 and “generic” documents (automated and manual uploads).



Document audit trail - full history available.



Security and access restrictions - limit visibility and activity by user role.



Fully integrated to Sage X3 - display documents internally and via external web portal.

Benefits

By using X3CloudDocs Outbound businesses are able to derive significant business efficiency gains through the implementation of automation and ease of use functionality. Sophisticated contact management rules allow for key documents to be sent and accessed with minimal human input, saving time at point of execution and in future at point of audit.



Any company still manually posting invoices and using up paper and toner really ought to strongly consider this software. It's the best thing we've done in years.

Finance Director, RH Amar



Functionality

X3CloudDocs Outbound provides an end-to-end document dispatch, archive and access solution. Visible in X3 or via a portal, it provides a secure & easy to use interface which facilitates remote working and digital traceability. Built with a cloud-based front end, and fully integrated with Sage X3, X3CloudDocs opens up the opportunity for full document traceability and a single location for all documents for intuitive and compliant document access and storage.

RAPID ROI

Implemented in days over a few weeks, with pre-configured document templates available. Get value faster.

CASH FLOW

Businesses using electronic invoicing get paid up to 33% faster, improving cash flow.

REDUCED COST

Minimises cost of physical document management and manual intervention, and drives real world savings.

WORKFLOW

EMAILS & NOTIFICATIONS



X3CloudDocs Workflow is an enhanced emailing and notification engine for Sage X3, enabling highly customisable branded emails and approval workflows.

How It Works

X3CloudDocs Workflow leverages the power of Sage X3 workflows and a custom HTML presentation layer for emails to send branded and interactive notification and approval emails.

01

Standard or bespoke Sage X3 workflows trigger an email output.

02

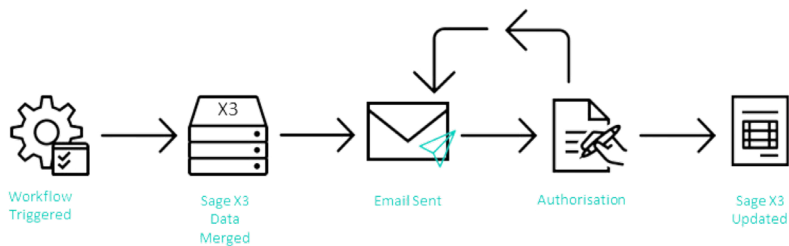
Key data is merged into an HTML5 email, with branded formatting and design.

03

The email is dispatched to a nominated contact, with any attachments and requests for approvals.

04

If authorisation, or narrative response, is required Sage X3 is updated with the outcome.



Functionality

X3CloudDocs Workflow bootstraps the powerful Sage X3 batch server/workflow engine, adding an enhanced presentation layer to any workflow email and facilitates interactive approval flows.

Professional email templates using extensive CSS & HTML coding capabilities.



Data fields can be passed through to formatted email.

Where approvals are used, a response can be captured and updated in Sage X3.



Attachments can be enabled and automatically sent with emails.

Benefits

Using X3CloudDocs Workflow businesses can unlock the true power of Sage X3's workflow functionality. By offering highly customisable and visually attractive emails, and interactive web forms, X3CloudDocs Workflow opens email automation up to business partners and internal stakeholders who would previously have been excluded due to the plain text outputs and licensing restrictions of standard Sage X3.

ON THE MOVE

X3CloudDocs Workflow enables interactive approvals off network via email and web portal using the cloud.

BRANDED EMAILS

Send fully branded emails to customers and suppliers, removing manual processes and improving communication.

RESPONSES

Provide narrative responses to approvals, or emails, using a customisable web form, integrated to Sage X3 datasets.

“

One of the biggest factors for me was the integration. X3CloudDocs proved to link better with Sage X3 than any other software.

Management Accountant,
Madison

”



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