sage X3

2021 R3 Highlights

August 2021

This document has been designed to provide you with an overview of new and enhanced capabilities delivered with Sage X3 Version 12 2021 R3 quarterly update release. For a full description of the new features and enhancements delivered with this release please refer to the What's New section of the Sage X3 Online help center.

To contact xkzero for Sage X3 support, visit our contact us page. For free videos covering basic usage of Sage X3, visit our Free Sage X3 Training Videos page.

Finance

General

Bank Reconciliation

The Banking Reconciliation reports (RAPPRO) have been enhanced with new parameters to allow you to select the reconciliation date when launching the report. This saves you time by allowing you to easily re-print the report for a past date.

VAT Framework

Enhancements have been made to the VAT Framework including:

- VAT box codes are now available as a dedicated column in VAT reports. These are the:

    - Tax declaration on the debits & reprint

    - Tax declaration / collection & reprint

- You can now remove VAT box codes from the box description field

- A group of report can be associated to a VAT return when defining the VAT form. You can now do this by assigning a print code to a VAT form that will allow you to print several reports for the VAT return.

VAT Return Posting

To make it easier for you to generate journal entries, the VAT posting feature on the VAT return has been enhanced. This will allow you to offset the total VAT amount calculated for each company through the VAT return extraction into the 'Tax to disburse' or 'tax credit' accounts.

Period Closing

You can now activate balance controls that are executed when closing one or a group of periods.

Please note: Controls are triggered by the parameter CTLCLOPER which will not be active by default. If the parameter is set to 'Yes', the controls are performed at the closing on each period. Dependent on the volume of data selected, it can increase the time required by the process. Please refer to the Sage X3 Online help center for more details.

Compliance

Canada

Legislation pack

The GST VAT return has been extended with an online submission option to allow you to generate a VAT form for online submission. This helps you to save time by generating files in pdf form and can be easily transmissible online.

For more help, please refer to the Legislation guide and Sage X3 Online help center for detailed information.

Great Britain

Make Tax Digital (MTD)

The Making Tax Digital header has been updated to include the anti-fraud information required by the HMRC.

Portugal

ATCUD Management

To help you meet Portuguese requirements, the series generation and ATCUD code link is now managed in the 'ATCUD management' function.

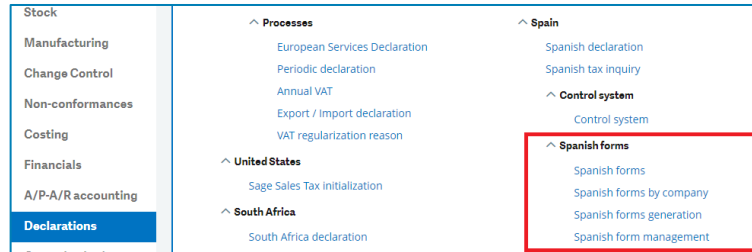You can now validate and print the ATCUD code in all relevant documents.

QR Codes in reports and SAF-T documents

To comply with local legislation, you can now add a QR code to all relevant documents and reports, you have the option to add the QR code to the first or last page.

Spain

Forms 180, 347 & 390

To help you comply with Spanish Tax Authority requirements, you no longer need an external application when generating the required declaration forms.

Note:

- Form 347: Information Return. Annual information return on transactions with third parties

- Form 180: Withholdings and payment on account. Income from urban building leasing. Annual summary

- Form 390: Value Added Tax. Annual summary tax return.
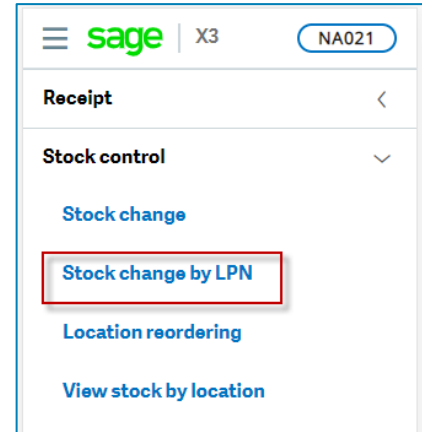
Mini One-Stop Shop (MOSS)

For ease of use, you can now register your business using MOSS instead of registering in each EU member country where you do business. You can also submit your VAT returns with a single EU member registration.

Distribution

Automated Data Collection

To streamline your user experience and ensure secure shop floor execution, new capabilities have been added to the following functions:

- ADC Intersite transfer

- ADC Subcontracting transfer

- ADC Stock count

- ADC Stock change by LPN

- ADC View stock by LPN

ADC View stock by location and ADC View stock by product-site transactions have been enhanced to display additional product stock detailed information.

You can use new touchscreen capabilities when supported by your handheld device. For currently supported devices, please refer to the Sage X3 Online help center.
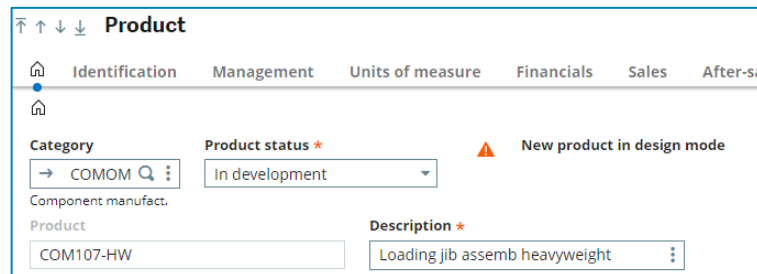
Manufacturing

New Product Introduction

Product Design has been enhanced so you can more easily manage the production of prototypes by Work Order.

You can now:

- Record notes when testing a design revision/ testing the prototype to a revision

- Create a separate Production BOM for each revision of a design product, enabling your design engineers to test different revisions using separate production BOM in a prototype work order.

- Record a work order to create a prototype of the new design product which helps you to test the new design product revision and compare different prototypes to see if they meet the requirements of the new product.

- Track the production of a prototype product.

- When the approval phase has been successfully completed, the design product can be released and can be produced in multiple alternatives.

Trial Kitting

The Sales Orders function has been enhanced by adding Trial kitting to the Ordered quantity field. You can use this functionality to assess future stock requirements or to find out whether there is sufficient stock to produce the requested quantity of the parent product.

Note: The Trial kitting action is only available for sales order lines where a BOM exists for the product.

Project Management

Time Management

Enhancements have been made to Time Management. You can now:

- Separate all grouped time entry lines into separate, individual lines.
- Currency rate and Remaining load update have been added to the Time summary table in the Weekly timesheet function.
- You can view and modify the Currency rate for a specific timesheet quantity.
- Analytical dimensions are now available in the Time entry detail screen.
- You can now further filter employee time records by Operating site.

Weekly Timesheet copy

To help you save time and avoid errors when creating Time Entry records, users can duplicate the time spent from one week to another.

Platform

Multiple print server instances

You can decrease the cost of your solution by configuring multiple print server instances on a single server. Each instance can use a different language or time zone. This simplifies report management when you have multiple time zones or languages.

Security

To enhance your levels of security, you can now better manage external URLs called in service mode.
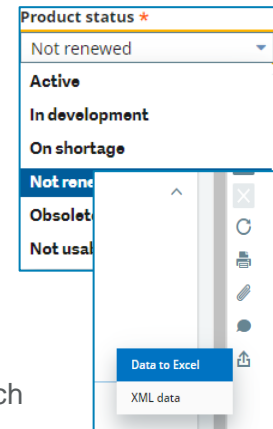
Sage X3 Automated Test Platform

Enhancements and Evolutions

The Sage X3 Automated Test Platform version 2.4.0 brings an enhancement to the user stored values functionality, which allows you to create your own set of parameters with your respective values.

Also, to simplify your user experience, new step definitions have been enhanced:

- Use the export action on the right panel

- Drop down list enhancement to select values with exact match

For more information, refer to the Sage X3 Automated Test Platform how-to guides available on the Sage X3 Online-Help center – Technical Help

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