

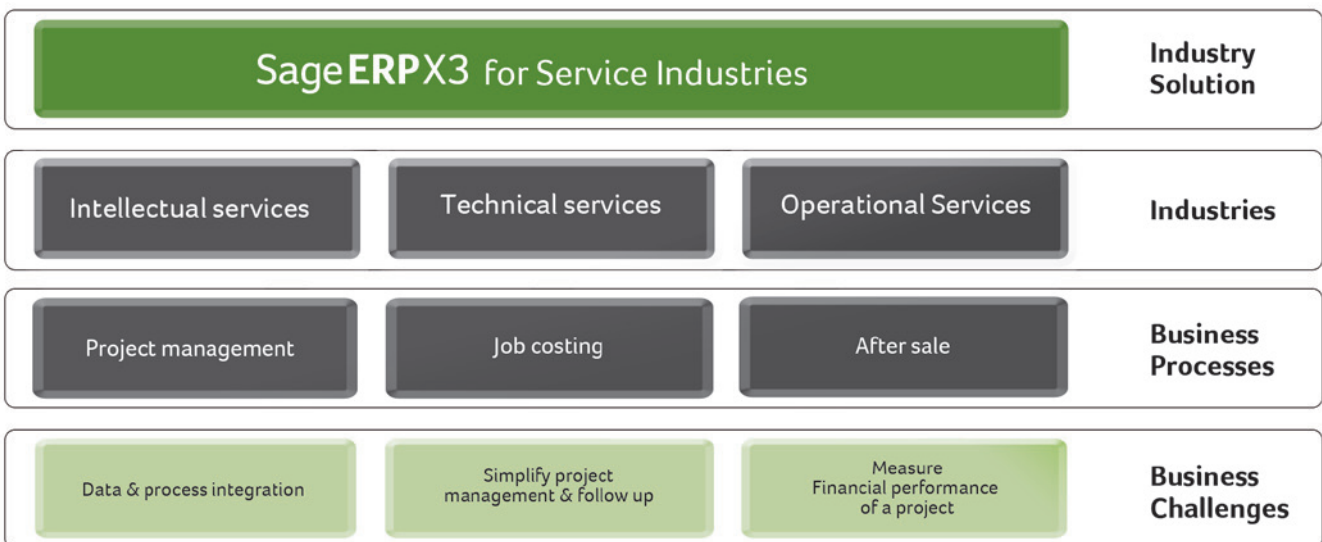


# Sage ERP X3 for Service Industries

In today's challenging environment, companies are recognising a need to refocus on their core business and expertise. As a result, many are outsourcing a growing number of tasks, which explains the boom in the corporate services market that has been reported over the last few years.

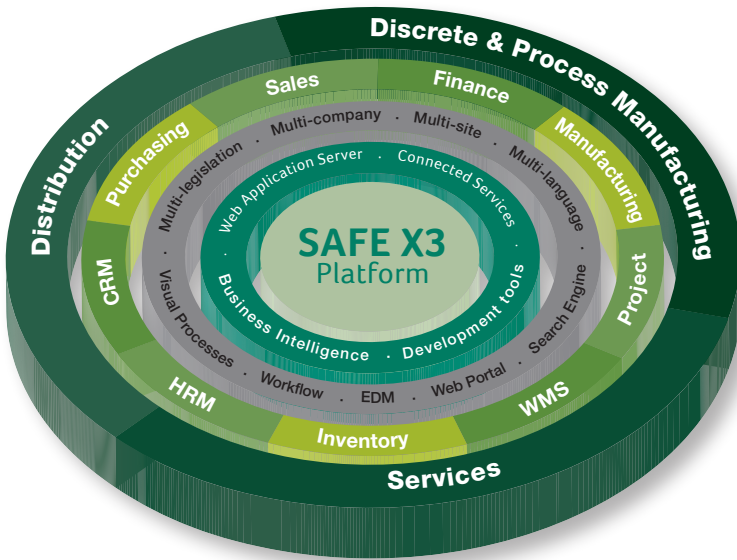
This sector covers a number of activities, with the companies involved generally experiencing high levels of growth and looking to exercise detailed control over their activities, while maintaining close relationships with their customers.

**Sage ERP X3 for Services** helps you simplify the management of your service activities and keep the operational, sales and financial aspects of your customers' projects firmly on the radar. Its features are tailored to the needs of professional service companies, especially businesses delivering operational services, such as recruitment and facilities management, or intellectual and technical services.



◆ Your main challenges involve overseeing your customers' projects, from design through to completion, with a dual customer and operational view, and include:

- **Centralising all the project-related components and events, and standardising the associated processes.**
- **Simplifying project management and ensuring accurate tracking;** a reliable evaluation of plan which measures need to be taken.
- **Measuring project financial performance** in order to control jobs, assess their profitability, draw comparisons between current projects, model transactions for tracking, forecasting and managing customers' projects, and archiving current statements.



## BENEFITS

- **Greater visibility and better project risk management**
  - Faster response
  - Superior process reliability
  - Risk mitigation
- **Maximise staff productivity**
  - Superior collaboration
  - Better communication
- **Improve margins**
  - Simplified cost control & planning

## ◆ Sage ERP X3 for Services delivers benefits across the core processes of your business:

### • Project and job costing and cost tracking

The project and job costing module brings together the data and processes required to define a project, from building the sales proposal through to carrying out the different project-related services. This flexible and agile module helps define the project as a series of services and deliverables, split the project into stages, and associate invoicing models relating to the project (by progress, stage, fixed date or fixed cost).

Statement generation can be used to generate assignment orders, and activity reports entered in web mode update progress on the project.

Jobs are monitored, and graphical dashboards provide an intuitive, visual control mechanism. Financial statements help control margins and track schedules.

### • CRM and after-sales service

With the CRM module, you can manage your contacts and representatives, and assign them actions or tasks, such as appointments, service enquiries, callout requests and phone calls.

The CRM module maintains a list of all the actions logged. All the equipment in your customer installed base is monitored by operational status and service activity. Automated services are planned as part of recurring contracts to better anticipate lead-times.

### • Finance

Sage ERP X3 for the Service Industries offers analytics and consolidated view reporting for an overview of activities for all projects being managed.

Financial accounting, cost and budgetary accounting with support for multiple companies, multiple sites, multi-legislation, multiple accounting plans and multiple currencies, management of spending and investment commitments, management of payment deadlines and cash collection, payment management and factoring, Sage ERP X3 spans the entire financial management chain, from financial and budgetary accounting through to commitments and fixed asset management.

### • Decision support

Decision support tools have become essential management aids for analysing and measuring a company's key data: sales performance per customer or product, from trends in expense accounts to manufacturing cost analytics. Seamlessly integrated into Sage ERP X3, the decision support tool allows users to collect, consolidate, model and extract your company data for informed decision-making and provide an overview of the activity.

**Sage:** The Sage Group plc is the leading global supplier of business management solutions to small and medium-sized enterprises. Formed in 1981, Sage was floated on the London Stock Exchange in 1989. Sage has over 6 million customers and more than 12,600 employees worldwide. We operate in over 24 countries covering the UK, mainland Europe, North America, South Africa, Australia and India.

**Sage ERP X3** is a dedicated solution for mid-market and larger companies with international demands that enables its clients to transform and perform through technologies. Over 3,500 customers representing 186,000 users worldwide have already chosen Sage ERP X3 because it is easy to use, rapid to deploy and cost effective. For over 10 years Sage ERP 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. Sage ERP X3 has presence in 56 countries and counts a network of more than 1,900 Sage professionals and 240 resellers in its ecosystem.



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