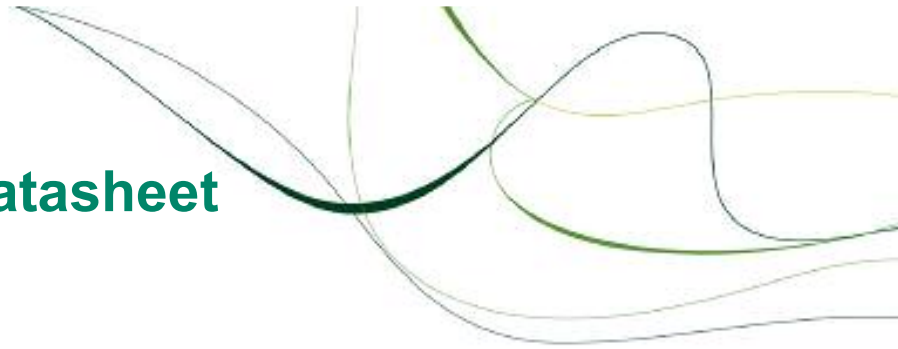


Sage ERP X3 v6.2 Datasheet

Credit Management - Feature Backgrounder

Title	Detail
<i>Feature description</i>	<p>This function improves the management of customer open items:</p> <ul style="list-style-type: none"> • Upstream of logistical transactions, manage outstanding customer outstanding balances by separating the roles between invoiced customers, paying customers and customers with payment risks. • Downstream of invoicing, automate the collection process by creating reminder campaigns. These reminder campaigns are integrated through the CRM module, enabling tasks to be distributed and followed up.
<i>Market needs and challenges</i>	<p>Managing cash and finance is a major issue for companies. Any action affecting the customer item, has a direct impact on cash flow. Credit is expensive. More than ever before, companies must:</p> <ul style="list-style-type: none"> • Reduce the risk that customers will default. Keeping track of debts is of the utmost importance. • Reduce payment lead times: anticipate the due date, monitor and handle disputes.
<i>Target Market</i>	<p>Ideally suited to companies with between 200 and 3,000 employees.</p>
<i>Key Features</i>	<ul style="list-style-type: none"> • Function 1: Each customer is assigned a unique ID and a "customer risk" that is used in risk monitoring. The elements that make up the customer outstanding balance (ordered, delivered without invoice, invoiced, portfolio, accounting balance, etc.) are accumulated on this risk record. According to the management rules for this customer, any previous transaction can be monitored in relation to the total of the outstanding balance authorised. • Function 2: Workbench List Creation, according to amendable criteria, of overdue payments to follow up in reminder campaigns. These workbenches can be used to organise the way customer collections are handled: telephone reminders, reminder letters sent by post or e-mail, automatic task generation in the CRM.
<i>Key Customers Benefits</i>	<ul style="list-style-type: none"> • Customer item risks controlled and anticipated <ul style="list-style-type: none"> ○ Default risks: provide better upstream monitoring of the outstanding balances in "customer risk" ○ Risks of overdue payment: improve collections with efficient tools to prevent, (preventative reminder for upcoming payment due dates) or handle (remind, calculate bank charges, handle disputes) overdue payments. • Reduction in lead times, promote collaboration between different functions <ul style="list-style-type: none"> ○ Organise the authorisation of customers exceeding allowed balances ○ CRM tasks for collection

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<i>Value proposition</i>	See Sage ERP X3 Product Backgrounder
<i>Competitive advantages</i>	See Sage ERP X3 Product Backgrounder
<i>Technology summary</i>	Sage ERP X3 is designed to operate with Windows, RedHat Linux and Unix, in Oracle multi-databases and SQL servers and with a multi-BP architecture in web and/or client server mode. Workflow engine, web services, business intelligence tools, Microsoft Office tools and interactive portal are integrated into the technology platform.
<i>Product category</i>	ERP, Finance
<i>Distribution</i>	Mix-Mode sales model: direct and indirect in America, Asia, Europe and Africa. Network of Sage partners and subsidiaries in almost 40 countries.
<i>Price</i>	Included in Financial module
<i>Disclaimer & copyright notices</i>	The information contained in this document is subject to change without notice and does not represent a commitment on behalf of Sage.