How an investment capital firm exported the sales order information to a predefined format with Sage X3

The client has been creating value through buyouts and growth equity investments in lower middle-market companies. Working from one office in Charlotte, North Carolina, its team of investment professionals has a singular focus on backing great managers in four industries: Communications, Healthcare, Services, and Software. Through close partnership and collaboration, the client has sourced and led hundreds of successful transactions, helping companies realize their potential.

However, there is considerable manual work to create the SO information in a defined template format. The team spends four hours every day just copy-pasting the information from X3 to a template. The customer wants to export the sales order information to a predefined format.

Solution

GerminIT's Sage X3 customization experts created custom fields in the Sales Order header table to prevent duplicate 753 transmissions and store the date and time of the pickup, including-

- Export flag
- Exported user
- Exported date
- Exported time

GerminIT's Sage X3 customization experts further added a custom button with the name 'Mark for 753 in the sales order.
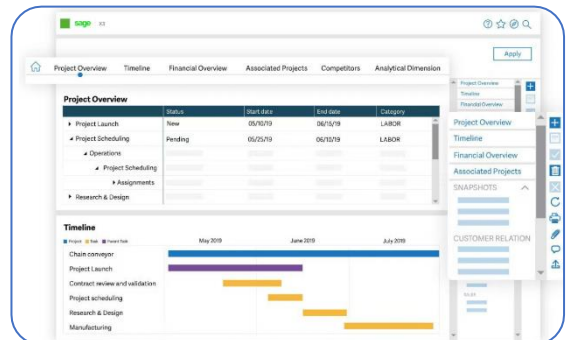
- This button will only be enabled for the customer who is given in the parameter and only for deliveries that have not been created.
- Once the user selects the 'Mark for 753' button a pop-up window will appear allowing the user to enter the pickup date and time for the sales order.
  - When the user selects the OK button, the system will start the 753 process. The data will be exported in a predefined format and then store the results a predefined location on the server.
  - The batch process will run at regular intervals of time and pick the sales orders which do not have a delivery created.
  - The default run time will be set to 12:00 PM.
    - Users will be allowed to adjust this time.
  - The system will check the customer which is given in the parameter and then export the data in the predefined format.
  - Once the file is exported the values are updated in the custom fields (Export flag, Exported user, Exported date & Exported time).
- If the user selects the 'Mark for 753' button a second time, after the file has been processed, the system will display an error message letting the user know that the 753 was already sent.
- The error message will include the pickup date.

We at GerminIT work on creating high-impact customizations on Sage X3.

Have a similar requirement or want to know how we implemented the solution for the client? Reach out to our Sage X3 customization experts at GerminIT.

To know more e-mail, us at info@germinit.com

Tags: Customer, Customization, ERP, ERP solution, Sage X3, sage x3 ERP, sage x3 login, security, X3