X3 Manufacturing Functionality Features

Comprehensive Product Data
Product attributes and categories
Families of products for MPS
Multiple manufacturing modes -ATO, MTO, CTO, MTS, process
Multiple replenishment rules with seasonality
Multiple material handling controls - lots, expiration dates, potency
Multiple units of measure
Bills of Material
Multi-level
Supports variants and options Validity dates
Mass maintenance

Technical Data Management
Factory calendars
Work and cost center management
Machine, labor, subcontracting
Routings
Multiple routing
Operation dates and times - Master routing
Library of standard operations
Setup Rules
Subcontracted operations
Forward and backward scheduling
Plan association

Replenishment
Min/max
MRP
User-defined replenishment rules (net requirements, lots, fixed period coverage and safety stock adjusted for seasonality)
Pegging
Intersite based on contracts and transfers between two partnering sites

Cost Accounting
Definition of cost elements
Calculation of planned costs (standard, revised standard, simulated, budgeted)
Actual production costs
Variance analysis per item
Accounting interface

Planning
MPS (multi-site, planning bills of material, bills of labor, operational orientation, budget, simulation)
Calculation of material requirements
Multi-site
Analysis of suggested requirements
Replanning Messages

Order Release
Multi-item release
Feasibility reasons
Material and load allocations
Forward and backward scheduling
Order smoothing
Shop traveler
Production status reporting (by work order or batch)
Control without production order (rate-based scheduling)

Decision-Making Tools
MPS and MRP schedules
Analyze multiple sites by product families or products
View stock outs and past due orders
Work plan
Analyze single sites and single products
Order grouping
Material planner workbench

Manufacturing Analysis
Resource utilization
Late order analysis
Delayed operation analysis
Operational yield
Material yield
Production yield
Interactive drag and drop using Gantt Diagram
Load simulation
Finite capacity planning

Inquiries
Work-in-process by product
Work-in-process by load
Projected stock by date
Analyze loads in graphical format
Allocation details
Order re-planning
Progress of production orders
Production order status reporting

Automatic Processing
Mass allocation and de-allocation
Mass forward and backward scheduling
Work order releases
Automatic work orders

Quality Management
Technical sheets with user-defined questions and expected responses (e.g., tolerances)
Accepted and rejected stock status control, including quarantines
Perform quality testing at user-defined steps (receiving, work-in-progress, pre-shipping)
Forward and backward quality traceability
Customer-specific quality requirements

Lot Control and Tracking
Forward and backward lot traceability
Record lot identifiers for each material transaction
Allocate inventory by lot
Maintain physical inventory by lot
Expiration date management
Option to allocate inventory on FEFO basis
(First Expired / First Out)
Expiring lot reports and inquiries
Sub-lot tracking and control

MRP/MPS
Multi-site capability
Simulations
Net requirements
Re-planning messages
User-defined reordering parameters

Regulatory Requirements
MSDS
Container Labeling
Certificate of Analysis

Batch/Continuous Processing
Work Order-less processing
Production reporting and back-flushing

Fixed period
Seasonal patterns
Net reorder quantities

User-defined planning horizons

360 ess, Inc.
Atlanta, GA – Greenville, SC – Toronto, Cnd – San Diego, CA
(770) 338-2011 map@360-ess.com

CRP

Multi-site capability
Simulations
Net requirements
Re-planning messages
User-defined reordering parameters

Routings

Operation dates, times and shifts
Master routing
Library of standard operations
Parallel operations
Sub-contracted operations
Forward and backward scheduling

Multi-Multi Design

Multiple companies
Multiple sites
Multiple languages
Multi-currency

Decision-Making Tools

Work plan
Analyze single sites and single products
Order grouping
Material planner workbench
Manufacturing analysis
Resource utilization
Late order analysis
Delayed operation analysis
Operational yield
Material yield
Production yield
Interactive drag and drop scheduling using Gantt Diagram
Load simulation
Finite capacity planning

Inquiries

Work-in-process by product
Work-in-process by load
Projected stock by date
Analyze loads in graphical format
Allocation details
Order re-planning
Progress of production orders
Production order status reporting

Automatic Processing

Mass allocation and de-allocation
Mass forward and backward scheduling
Work order releases
Automatic work orders

Cost Accounting

Definition of cost elements
Calculation of planned costs (standard, revised standard, simulated, budgeted)
Actual production costs
Variance analysis per item
Accounting interface

Sales

Order Entry

User-defined order types for varying prompts, displays and event sequencing
Special orders for loans, transfers and consignments
Add new customers online during order entry
Order products by customer product number and default customer-specific information on order line
Order substitutes and products that supersede obsolete products
Vary ship-to's, shipping sites, carriers and delivery dates by order line
Order kits with variants and options
Check minimum gross margin and low price thresholds, and block or accept further entry according to rules
Sales order revision control with ability to replicate one change across multiple line items
Automatically close unfilled orders and lines within predefined tolerance
Automatic inter-company transaction management

Automatically Generate Purchase Orders

Non-stock purchases
Automatically order predefined minimum quantities from preferred supplier

Supporting Inquiries

Inquire during or outside of entry functions
Last prices and price reasons
Customer account information
Current and projected stock levels by site or all sites
Zoom to more detailed information locations, lots, serial numbers, etc.

Contracts

Vary contract terms, validity dates and prices by line
Schedule releases over user-defined firm and planning time horizons

Reminders/Dunning Letters

Supports multiple successive levels of reminder according to severity of past due condition
Block account activity based on user-defined criteria

Pricing

Automatic pricing by line item according to pricing rules with ability to edit
Maintains gross and net price on order line with option to view price reasons and last prices
Automatically factor discounts and charges into net price or break out separately
Adds free products or quantities if predefined thresholds are met
Recalculates prices for groups of related products if predefined threshold is met
Calculates differential between kit components selected during order entry

Sales Documents

Order acknowledgements
Sales quotes
Contracts

Inventory Allocations

Allocate manually during order entry or separately using a batch process with options
Allocate by site, lot or consignment location
Reserve inventory for customers (pre-order)
De-allocate inventory
Allocate by customer shipping route and priority

Quotes

Enter quotes for customers or prospects with full expiration date control
Produce hard copy quotations
Track probability of converting quotes into orders
Easily convert quotes into sales orders

Invoicing

Produced automatically or by user request
Define invoicing rules according to customer preference (one per order, shipment, bill of lading or period)
Consolidate invoices based on customer-preferred frequencies (daily, weekly, monthly, etc.)
Supports counter sale environments
Issue and track prepayment requests and payments
Multiple payment terms and methods including scheduled due dates per invoice and recurring invoicing
Automatically use alternate payment terms if amount is less than predefined minimum
Proforma invoicing

Customer Delivery Scheduling

Default shipping sites by ship-to delivery address
Maintain shipping lead times between sites and ship-to addresses
Calculate shipping date for meeting requested delivery date based on lead time
Maintain customer availability days and dates and round delivery date to next work day
Multiple fulfillment methods (from stock, vendor direct, buyin, transfer order)

Shipping Confirmation

Produce picking tickets and packing slips
Record serial numbers for end-user tracking
Combine multiple orders on a single shipment
Automatic or manual shipping confirmation

Sales Commissions

Multiple sales reps per order line
Commission calculations based on user-defined formulas

Customer Returns

Link return to original shipment
Track return, expected return and expiration dates
Automatically or manually assign RMA numbers
Track return reasons by line item
Process returns for loans
Produce credit memos

Credit Checking

Online credit checking with ability to hold customers that fail credit check
Bypass credit checking for specified customers
Customer credit inquiries

Reporting and Statistical Analysis

Standard reports or user-defined reporting using Crystal Reports™
User-defined formulas for calculating ABC rankings for customers and products

Sales Tax Calculations

Supports North American and VAT taxing
Option to calculate prices with or without taxes

CRM

Sales Support Features

Prospects/Customers

Automatic update of the steps in a sales cycle
Secondary sales reps (possible by product groups)
Inquiry on the entire pre- and post-sale history
Automatic control over converting a prospect into a customer

Sales Objectives

Forecast entry
Definitions of objectives
Calculation of the variances of actual results to forecasts

Contacts

Managed independently from business partners
Multiple relationships with companies, sites and business partners
Inquiry on the entire pre- and post-sale history

Opportunities/Projects

Competitive information
Pre- and post-sale steps
Associated projects
Flow control to create sales quotes
Quotes by opportunity and project
Double expected value weightings on revenues

Sales Workbench

Global view of pending and late sales activities
Quick search on the contact who is calling

Appointments, Calls and Tasks

May be managed using approximate dates
Control over employees' scheduling conflicts with direct re-scheduling when necessary
Resource reservations
Appointment address search
May be managed using approximate dates
Automated call reporting
Call attempts
Phone number search
Late warnings to the requester of the task
Automatic control over the coverage of a request
Solution search in a problem/solution knowledge base
Request report history
Semi-automatic creation of sales quote and customer appointment
Creation of solution record when service is complete
Warranty requests

Customer Support Features

Customer Database

Units installed at customer sites
Specific physical location
Associated service contract history
Successive installation history

Service Contracts

Automatic creation of service contract templates
Service contract invoicing
Contract renewal
Indexing databases
Automatic contract revaluation
Contract service constraints
Skill groups covered
Products and services covered
Maintenance and warranty contracts

Service Responses

Automatic search for most qualified service employees
Automatic search for service contractors who are qualified in the service response domain
Schedule conflict control

Knowledge Base

Search by skill group
Search on content
Quick search on multiple keywords

Service Workbench

Requests for overdue and pending services
View of late service responses and pending responses
Dispatching content
Statistics on personnel and queue workload
List of service contracts to be renewed

Products
Associated warranties
Service contract templates
Warranty tickets
Accumulated per month
Expressed as an amount and percentage
Breakdown of the objectives according to multiple criteria
Month by month for a fiscal year

Sales Workbench
Global view of pending and late sales activities
Quick search on the contact who is calling

Service Contractors
Partner contractor skills
Service response fields
Collaborative financial conditions

Service Callers and Requests
Several service callers per customer
Dynamic service caller parameters and information
Service caller assignment by user
Automatic assignment of requests by skill groups
Assignment possible on: Service site, Queue, Personnel, Redirect to sales rep
Automatic control over the coverage of a request
Solution search in a problem/solution knowledge base
Request report history
Semi-automatic creation of sales quote and customer appointment
Creation of solution record when service is complete
Warranty requests

Marketing Features

Competing Products
Competitors
Average sell prices
Strengths and weaknesses

Marketing Campaigns
Planned and actual budget used by a campaign
Creation of the marketing activities

Marketing Plan
Tree-structure view of the campaigns and ongoing activities

Mass Mail Assistant
Recipient selection
Combining lists (merge, intersect, etc.)
Message design
Creation of the mailing history
Automatic contract revaluation

Phone Campaign Assistant
Definition or recall of phone call targets
Distribution of calls to tele-reps by various user-defined methods
Definition of call scripts

Trade Show Assistant
Entry of booth characteristics and cost

Purchasing

Purchased Product Categories
Raw materials
Products purchased for resale
Supplies and capital equipment
Services and recurring items (e.g., maintenance)
Non-stocks
Sub-contracted products

PO Creation Methods
Manually enter PO's or duplicate a previous PO
Copy from purchase requests and vendor quotes
Automatically generate PO's from sales orders and buyer work plans

Contracts
Vary terms, validity dates and prices by line item
Schedule releases over user-defined firm and planning time horizons

Purchasing Modes
Centralized and decentralized purchasing sites
Deliver to internal sites, consignment locations and customers (direct shipments)

Encumbrance Accounting
Checks budget allowances at time of request and purchase
Pre-commits at time of request; commits at time of PO, in fiscal period of order date or due date
Signature process for approving budget overruns

Receiving
Receive by supplier, PO number or product
Assign putaway locations
Record lot numbers and serial numbers
Inspect QC products and calculate expiration dates
Receive full or partial quantities and products not on PO; option to disallow over-receipts
Record rejected and disputed receipts

Requests for Proposal
Enter manually or copy from purchase requests
Issue RFQ's to any number of vendors
Send follow-up reminders to vendors
Record vendor quotes, terms and conditions
Automatically generate pricing records

Supplier Invoice Entry
Vary entry based on user-defined parameters and by invoice type (normal, memo, third-party)
Load lines from original PO or receipt
Match invoice to PO and receipt information

Purchase Requests
Enter manually or generate automatically from replenishment requirements
Pre-commit amounts against budgeted expenditures (encumbrance accounting)
Optional multi-level approval cycle

Purchase Order Entry
User-defined order types for varying prompts, displays and event sequencing
Vary receiving sites and delivery dates by line item
Access previous purchase prices during entry
Enter and default product information by supplier product
Track product group price thresholds for obtaining free freight
Issue purchase orders (hard copy or electronic)
Order status inquiries by PO, supplier and product
PO revision control with ability to replicate one change across multiple line items

Supplier Returns
Enter manually or copy from PO or receipt
Tracking of return reasons and lot numbers
Option to cancel order or reinstate on same PO line, new PO line or new PO

Accounting Integration
Track invoices to be received
Online update of GL when validating invoices
Post invoice variances automatically
Define installments and track payments
Update inventory receipt costs AUC, last, FIFO, average lot, order

Pricing and Units of Measure
Automatic pricing by line item according to pricing rules with ability to edit
Automatically factor discounts and charges into net price or break out separately
Checks for blanket order discounts and minimum purchase amounts and quantities
Converts order quantities into purchasing units
Converts quantities into supplier packing units

Standard Reports
Open purchase orders, purchase requests, RFQ's and contracts
Receiving worksheet (expected receipts)
PO receipts log
Supplier return preparation list
Calculates statistics in real time or deferred

Closing Unfulfilled Purchase Orders
Automatically close lines within user-defined tolerance
Force close status on unfilled lines outside of tolerance

Supplier Performance Measurements
Lead time
Price
Quality
Quantity
User-defined metrics
Provides total percentage to compare with other vendors

Statistics and User-Defined Reports
User-defined statistical formulas and calculations - such as supplier ABC rankings, average number of receipts per PO, etc.
User-defined reports using Crystal Reports™

Workflow
Controlled by signature management specifically for PO processing
Available globally based on any significant event trigger

Signature Management
Multi-level approval process
Purchase requests
Purchase orders
Contracts

Integrated with Stock Replenishment
Lists open requirements based on date PO is required to meet due date
Calculates due dates based on vendor lead time
Reorder based on reorder points or periods of coverage
Inventory

Inventory

Product Categories
Manufactured
Purchased
Subcontracted
Phantom
Internal (supplies and capital equipment)
Services

Descriptive Product Information
User-defined numbers, descriptions and notes
Attached images and documents (such as MSDS)
Supporting information for sales and purchasing
(warranty periods, non-stocks and substitutes and superseding)
Life cycle validity dates

Quality Control
Flexible definition of questions and responses
Tracks accepted, rejected and expired stock
Performed with or without lot control
Receiving, storage and pre-shipping inspections
Historical transaction inquiries for traceability

Location Management
Flexible location numbering formats
Dedicated, random and dynamic storage types
Suggested putaway and picking location assignments
Dedicated to single or multiple items/locations
Immediate, delayed or blocked access
Consigned inventory tracking at third-party sites

Stock Management
Track inventory by physical location
Lot numbers and sub-lots
Quality status and disposition (accepted, rejected, in QC)
Serial numbers
Expiration dates
Potency
Issue stock based on first-in or first-expired
International Units management
Forward and backward traceability

Multiple Units of Measure
Inventory units
Sales units, by product and customer product
Purchasing units, by product and supplier product
Packing units
Statistical units
Fixed or variable conversion factors
Define decimal quantities up to six digits

Inventory Balances
On-hand
Allocated
Reserved
QC
Available
On-order
Backordered
Transferred
In-transit
Available-to-promise

Stock Inquiries
Quantities by warehouse
Stock details by warehouse
Location contents
Expired and expiring stock
Projected stock quantities
Lots
Serial numbers
Available-to-promise
Stock movements
Allocation details
Potency

Physical Counting
Cycle, spot, annual and zero stock counts
Option to include serial number validation
Select products based on ABC class
Enter, review and validate physical counts
Maintain last count data by product/size

360 ess, Inc.
Atlanta, GA – Greenville, SC – Toronto, Cnd – San Diego, CA
(770) 338-2011 map@360-ess.com

Inventory Replenishment
Calculates reorder points and EOQs
User-defined safety stock factors
Calculates periods of coverage and lot sizes
Use with or without MRP
Supports min/max

Inventory Costing Methods
Standard
Revised standard
Order cost
Average lot cost
FIFO
LIFO
Average unit cost
Last cost

Bills of Material
Single or multi-level production and sales bills
Normal components, variants and options
Alternate BOM for special customer requirements
Where-used inquiries
Copy feature for defining similar BOM structures

Inventory Movements and Transactions
Inter-site (transfers between sites)
Intra-site (transfers between locations)
Picking location replenishment suggestions
Receiving putaway suggestions
Places locations with expired products on hold
Complete traceability of all movements
User-defined inventory quantity adjustments

Statistics and Management Reports
Inventory accuracy based on count adjustments
Quality control (rejects, expired products, etc.)
ABC rankings (simulated and actual)
Supports up to five user-defined statistical product groups (product line, price class, etc.)
Last activity data by product/site

General Ledger

Chart of Accounts
Simplified charge of account structures with account linking
Fixed or variable GL account lengths with user-defined mnemonics
Validity date-controlled
Financial and quantity amounts
Collective accounts for storing business partner account activity
Up to nine user-defined analytical dimensions
(e.g., departments, cost centers, product lines)

Fiscal Periods
Multiple fiscal calendars per company
Up to 24 periods per calendar
Year-end period for adjustments
Reopen closed periods according to rules

Analytical Dimensions
Define up to nine analytical dimensions
Financial and quantity amounts
Multi-dimension analytical pyramids (99 levels)
Optional use by company and site
Restricted combinations of accounts and dimensions
(e.g., no R&D department in New York)

Journal Matching
Manual and automatic
Collective account journal matching (e.g., payments on account)
User-defined search priorities
Match based on amounts, balances, descriptions, references and currencies
Un-matching capability

Multi-Currency Management
Unlimited number of currencies and exchange rates manually entered or imported
Tracks and posts exchange rate variances
Currency by company, site and account
Multiple currency types (company, business partner and reporting)
Multiple exchange rate types daily, monthly, average
Euro-compliant

Multi-Company Processing
Multiple companies with same or different account structures
Inter-company transactions and eliminations
Consolidate results
Multiple fiscal calendars

Financial Integration
Automatic journals from sales, PO, AR, AP, etc.
Real-time or deferred posting

Allocations
Redistribute to and from any account
Perform multiple allocation passes
Define recurring allocations based on fixed or variable amounts

Budgeting
By company or site
Financial and quantity amounts
Up to three dimension views (e.g., sales by channel by product line)
Track budgets against pre-committed and committed amounts from purchasing
Actual vs. budget comparisons
Unlimited revised budgets
Enter manually, import from spreadsheets or use formulas
Adjust budgets based on monthly weighting factors
(e.g., seasonal profiles)
Create budgets using cost allocation ratios (e.g., overhead by department)

Journals
Manual journal entry with user-defined entry screens and processing rules
Multiple types of automatic journals
Temporary and final status controls
Recurring journals - fixed by period or variable
Distribute total amount based on monthly weighting factors (e.g., seasonal profile)
Simulated journals (active and inactive)
Model journals (templates)
Perform automatic accrual reversals on user-defined date
Currency variances

Commitment Accounting
Budget controls for PO pre-commitments and commitments
Multi-dimensional inquiries
Zooms from general to details
Multi-criteria search
Accounts, account balances, dimensions and dimension balances
Inquiry of analytical dimension pyramids (groupings) with successive zooms

Financial Extraction and Reporting
Operating statements and balance sheets
Other financial reports - trial balances, etc.
Integrated with FRx™ and F9™
Inquiry screens or hard copy
User-defined row and column content and formats
Reporting codes and company group codes to restrict report content
User-defined reporting periods and accounts
Consolidated, company and site-level reporting

AR/AP

Integrated with Sales and Purchasing
Automatic generation of receivable and payable items from sales and purchase invoices
Multiple invoice types (normal, credit, returns)

Multi-Currency Management
Unlimited number of currencies and exchange rates manually entered or imported
Tracks and posts exchange rate variances
Multiple currency types (company, business partner and reporting)
Multiple exchange rate types (daily, monthly, average)
Euro-compliant

Business Partner Roles and Types
One parent for multiple business partner types and roles
Flag business partner as customer, supplier, carrier, sales rep, factor or miscellaneous
Multiple ship-to, bill-to and pay-by suppliers per parent
Multiple buy-from, bill-from and pay-to suppliers per parent
Unlimited contacts and addresses per business partner

User-Defined Cash Collection Process
Enter and apply payments
Select single or multiple banks for deposit
Generate deposits and create deposit slips
Post cash to GL

Cash Application Methods
Dunning Letters/Reminders
Optional by business partner
Send based on single late invoice or to business partner for all invoices
Multiple levels
Reminders for installment payments

Flexible AP Payment Process
Payment proposals (simulated or real)
Payment selections (manual or automatic)
Pay partial or full amounts
Optional item and payment approval, multi-level
Select single or multiple bank accounts (prorated)
Check writing with restart and number controls
Check voiding with item reinstatement
Check reconciliation by check or bank statement
Import bank statements

AP Payment Proposals
By payment method, business partner, site
By due date, minimum and maximum amount
Pay from single bank account or prorate across multiple bank accounts

Credit Management
Inquiry of complete customer account
Credit insurance amounts by business partner
Authorized credit amount and current available credit calculations
Customer hold/release management
Tracks credit position with suppliers

Manual Invoice Entry
Enter customer invoices for miscellaneous sales
Multiple invoice types including proforma
Enter vendor invoices for miscellaneous purchases
Automatically detects duplicate invoice numbers

Open Item Management
Inquiries based on user-defined criteria
Prepayments
Installment payments with multiple due dates and payment methods
Multiple payment methods and types (check, EFT, credit card with user-defined processing rules)
Edit open items (e.g., extend due dates)
Send statements, optional by business partner
Track disputed items

Flexible Payment Terms
User-defined rules for calculating item due dates
Split item amount by percentages and create multiple due date installments
Share terms between AR and AP
Automatically calculate item due dates based on user defined rules
Automatically adjust due date to next workday based on pre-defined calendar
Automatic use of alternate payment term if amount due is less than pre-defined minimum

Cash Application Methods
Automatic payment matching
Apply by invoice and amount
Apply fully or partially
Sort items by date, amount, etc. prior to applying
Apply against range of invoices
Enter payments on account
Apply by invoice statement
Re-apply mistaken applications

Multi-National Requirements
“Southern European” accounting
Draft management
VAT
Analytical accounting

Accelerate you Business Performance

360 ess, Inc.
Atlanta, GA – Greenville, SC – Toronto, Cnd – San Diego, CA
(770) 338-2011 map@360-ess.com