

The Answer Company | White Paper

The Benefits of Sage ERP X3 Over Sage BusinessVision A Business Case for Migration

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Sage BusinessVision vs Sage ERP X3: Business Intelligence Software and Reporting

The business case for companies to migrate from Sage BusinessVision to a complete ERP solution is strong. Amongst the reasons that stand out are: **pricing incentives, mobile access, and additional functionality**, including advanced reporting and the use of business intelligence software. Companies that upgrade from BV to Sage ERP X3 greatly improve their reporting capabilities.

Sage ERP X3 is a much more advanced system than Sage BusinessVision

It traces and connects all business processes of an organization in real time, collecting data, organizing it in intelligence reports, and thus turning routine actions into valuable information.

Sage ERP X3's different modules use the data captured from the system. Through the system's automated intelligence and reporting module, Sage Enterprise Intelligence, users get advanced and detailed reports - such as **worksheet reports, graphical reports, and dashboard** - on the business' performance.





Companies currently using Sage BusinessVision have very shallow reporting capabilities. The system is unable to account for many of the company's business processes and reporting is limited to sales analysis and sales order information, as well as purchase orders and purchase analysis.

BV users do not have the privilege of automated reporting

Instead, they have to manually pull data from their system and fit into manually created financial reports in Excel. With Sage ERP X3, companies enjoy real time, financial reporting that is automated, leading to hours of work saved weekly.

The system comes equipped with a report builder (in addition to already built-in standard reports) that can access all fields, tables, views, and stored procedures in Sage ERP X3. It automatically pulls all the data and creates your own Excel based reports from all X3 modules, financial or otherwise.

The benefits of using Sage ERP X3 over Sage Business Vision for financial, accounting, and intelligence reporting include:

-  Automating Reporting - Saving Hours of Accounting and Bookkeeping Time
-  Leveraging Existing Microsoft Excel Skills
-  Immediate Reporting with Standard Reports and Dashboard
-  Multi-company Reports and Consolidation

Automating Reporting - Saving Hours of Accounting and Bookkeeping Time

Financial managers along with bookkeeping and accounting staff will no longer have to go through the drag of manual report preparation. That means no more cutting and pasting, and repetitive data extracts. Sage ERP X3 automatically processes data, extracts it from the system when a report is being built, and fills out reports based on defined database connections.

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Users can then organize, copy and modify reports within Sage ERP X3. By easily setting up report fields and the parameters they are looking for, as well as sort and summation criteria, users can create new reports that quickly bring to light the information needed for their decision-making.

Leveraging Existing Microsoft Excel Skills

Since X3's BI modules come equipped with predefined Excel reports (including Excel based Income Statements, Balance Sheets, Sales, Purchases, and Inventory), users will be familiar with editing and drilling down for specific information. This applies not only to financial reporting but to all aspects of the company, as all data residing in the ERP system, such as business management or the payroll database, can also be delivered automatically into Excel-based report templates.

Immediate Reporting with Standard Reports and Dashboard

Through Sage ERP X3's Intelligence Dashboard, users can access **real-time reports** that deliver critical information in one easily accessible place. Users are able to access current metrics and key performance indications (KPIs) in a graphical format, making trends visible, and getting meaningful information at the hands of the appropriate personnel.

The BV dashboard pales in comparison to X3's dashboard as the latter comes fully equipped with a variety of processes right out-of-the-box. While the BV intelligence dashboard comes with four processes (sales analysis, sales orders, purchase analysis, and purchase orders) that pull up transaction figures, X3 has every process within the company available for further drill down (see image below).



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Multi-company Reports and Consolidations

Businesses using Sage ERP X3's Business Intelligence module are able to connect multiple data sources, allowing users to consolidate data from multiple companies, divisions, and databases. This is ideal for businesses that consist of multiple organizations, where Sage ERP X3 supports multi-ledger, uses a shared chart of accounts across an unlimited number of companies, and allows for an unlimited number of fiscal calendars.

The system can automatically consolidate accounting and financial data from different business units and consolidate them into the necessary reports. allows you to create consolidations of unlike data in one Excel report, making year-end consolidations of multiple companies a much easier process.

Mobile Access to Intelligence and Reporting

Users of Sage ERP X3 can access the command center for Business Intelligence from their smartphones or tablets since the system's web-based architecture allows access from anywhere, simply through a web browser. While it's technically possible to have web access to BV by hosting it on a server and accessing through Remote Desktop Connections, this is certainly a more limited option, and definitely doesn't allow smartphone or tablet access.

The advanced reporting functionality of Sage ERP X3 is an example of how the system automates simple yet burdensome processes saving users hours of work while delivering in-depth visibility into company operations.

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Sage BV vs Sage ERP X3: Improving Inventory Management

Current users of Sage BusinessVision have access to basic inventory management functionalities that answer the question ‘what do we have in stock?’, but it may be coming short of delivering substantial benefits to users. A more advanced inventory software solution, like the inventory module of Sage ERP X3, will take a company to the next level and answer important questions like:

- What items should you stock in each location?
- How many of each item?
- When should an order be put in to ensure appropriate levels of items
- What is the right balance of cash/inventory?
- Do inventory items meet quality standards and pass quality control?
- Where is each specific item?
- What items have specific ingredients gone in to?

These questions go beyond Sage BusinessVision’s capability to offer visibility and control into inventory levels and items. Their answers come from Sage ERP X3’s ability to collect and process all data relevant to making important inventory decisions, offering actionable intelligence to users.

We are finding with our customers at The Answer Company that solutions like Sage ERP X3’s Inventory functionality and access to Sage Inventory Advisor are having a big impact on ROI. Sometimes the impact on ROI can be big enough to help cover the costs of upgrading a company’s solution and its service plan.

Managing Inventory With BusinessVision

Current capabilities of BV include Inventory Control, Order Entry, and Purchase Order. Even when these are augmented by a third-party add-ons* like BVEssentials, they still come short of what current inventory solutions can do for a business.

BV and its add-ons shed visibility into current levels. They also automate basic processes, like automatically reducing or increasing items in the accounts when sold or returned. From the application, you can access purchase and sale history, define product pricing and other additional information regarding products. In essence, it is an automatically updated database with information regarding products. You can even define thresholds for re-ordering inventory, so that if you believe that a certain limit is safe to work with, the system will let you know that you have reached it and it’s time to place a new order.

But what are these thresholds? How can you use your years of inventory data and sales information to design a better inventory strategy? One that frees up cash and capital for your business while ensuring that customers find the items they need when they do business with you?

Unfortunately BusinessVision and its add-ons are not powerful enough to help small and midsized businesses make better decisions with regards to inventory levels.

Managing Inventory with Sage ERP X3

The in-depth level of Sage ERP X3’s Inventory Management puts companies on a much higher level of sophistication when compared to BV. The processes within Sage ERP X3’s inventory application are in-depth and track transactions in real time, in multiple locations.

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Inventory Costing Methods and In-Depth Item Details

To begin with, X3's inventory module allows for greater information regarding each inventory item, for in-depth drill-down by staff and vendors. It allows for more inventory costing methods, as BV only allows for FIFO, LIFO, and average cost, while X3 delivers those three plus another four - standard, revised standard, order, cost, and average lot cost.

X3 also provides a greater variety of inventory balances, including on-hand, allocated, reserved, items that are going through quality control, available, on-order, backordered, in-transit, and so on. The system also keeps tracks of bill of material, calculates different ingredients in inventory necessary for manufacturing ensuring that they are present, while tracking Intersite and Intrasite inventory moves to ensure all items are where they need to be. Inventory control and management is greatly improved with X3.

Tracking Inventory Items Movement

Each time an inventory item moves, within the company or to another company or client, the system keeps track of it. Users can determine the path inventory follows and start collecting data on inventory movements immediately. This intelligence then allows the business to create reports showing efficiencies and improvements for inventory stock levels, location management, replenishment schedules, stock movement logistics, delivery and receiving scheduling, and quality control.

The improvements delivered by a comprehensive enterprise wide solution like X3 are significant. This is because the new age of business software that has brought us X3 takes the accounting focus of BV to a new level of sophistication, mapping and tracking all business processes in depth through powerful software systems. So it is not uncommon for a company to outgrow their current software systems. If the solution you implement doesn't allow you to realize the benefits of managing inventory levels to cut costs and improve customer satisfaction, then it will never pay for itself.

Access to New Modules and Solutions Through Sage Data Cloud

Another important aspect of upgrading to a solution like Sage ERP X3 is access to new modules and solutions that become available through the Sage Cloud platform. Modules like Sage Inventory Advisor, an inexpensive yet powerful tool that offers diagnostic, analytic, and forecasting information that is instrumental in the day-to-day management of inventory levels are a phone call away for Sage X3 users, yet not available to BV customers. This is consistent with the future trend of additional services and functionality being available on demand instead of requiring major system and technology infrastructure uphaul.

Inventory can be a pain point for many small and mid-sized businesses. Customer expectations dictate that items must be in stock, or they will go looking for them elsewhere, but keeping large volumes of various items in the warehouse can quickly eat away at capital and cash that bring higher returns to the company.

A good inventory management solution should not only show what you have and account for it coming in or leaving your organization. It should help you make decisions that are aligned with your core goals and growth objectives.

*Inventory Management third-party add-ons may include additional basic functionality like inventory look-up, printing receiving reports, transfer reports, and write-offs).

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Scalability, Growth Benefits of Sage ERP X3 vs Sage BusinessVision

Users of Sage BusinessVision may want to consider a move up to a system with scalability like Sage ERP X3. If your company has the goal of making your investment in ERP systems last, scalability is an area that you will want to focus on. How well, and how easily, a system scales can determine if the decision on an ERP solution was the right one. That's because scalability of an ERP solution will not only determine how well the system can support the company's needs now, but also in the long term.

Companies currently using Sage BusinessVision will encounter is the accounting system's lack of scalability. Modern systems like Sage ERP X3 are distinctly better options for companies looking to grow without disruption or technology issues.

Scalability: What it is and why it is important when it comes to ERP?

Scalability is an ERP system's ability to deal with change. As a business grows the systems that support it will need to grow as well, so scalability is the system's ability to grow alongside the company. If a system can scale up as the need arises, it gives the company room for growth without major up hauls to its information systems.

There are four distinct areas that a company will want to grow its ERP system: utilization, platform, user count, and functionality.

Increasing The Capacity of an ERP System

Utilization is the system's ability to handle usage and the burden that additional use may cause on the system. Things like the amount of data stored in the system, number of users on the system at one time, transactions being run, and servers being used to run the system, affect the system's ability to operate properly.

Systems like Sage BusinessVision, which cannot be scaled up, will see performance continuously worsen as the company grows and more data is entered. For example, with BV's closed database structure and data-storage limits, the system's speed will suffer and the database size will become an issue.

A good ERP system for growing companies will have an open database structure that allows for additional servers to be added as the company's needs increase. Sage ERP X3 can manage data processing across many servers, and as the company grows and more users and operations need to be managed, the system's performance can keep up by adding additional servers for storage and processing capacity.

Within X3, this is a simple process and the system can handle changes from 10 to 1500 users without affecting performance significantly. The system also has deferred processing capability, whereby it can increase performance levels by rescheduling some offline processes until less computing capabilities is required.

Platform and Operating System Infrastructure

Platform scalability when it comes to ERP is the ability of the solution to deliver its functionality in multiple computing environments. Not long ago, if an ERP solution or other business software ran in a Windows environment, that would have been good enough for most businesses.

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This is no longer the case, as users now want to access applications from home or mobile devices, all possibly with different operating systems, while third party business applications may run in different environments, or particular business units having to utilize different operating systems for critical applications. One of the ways that ERP systems deal with supporting access from multiple operating systems is through web-enabled software.

Sage BusinessVision is limited, being one of those solutions that only runs in a Windows environment. The system is not web enabled and does not support mobile device access. On the other hand, Sage ERP X3 offers an open architecture that provides companies the choice of operating systems, databases, network environment, and deployment options. It gives users the ability to switch from one platform to another without impacting the functionality and user environment.

Sage ERP X3 is a web-based solution that runs equally on Windows, Unix, or Linux Red Hat, with either Oracle or Microsoft SQL databases, and it can be deployed as a web application, a desktop application or both. So it has all bases covered.

Growth will lead to Increasing User Count

As a company grows it will hire more people that will need to access the company's systems. It's the most basic and fundamental level of scalability, but it is important to consider because even though most ERP solutions will allow additional users, the cost and ease of this happening can vary.

For the reasons we mentioned above (under Utilization), adding users to Sage BusinessVision can cause problems for the system as it tries to handle the additional data and processing requirements. Depending on how the system is deployed, it can quickly become problematic to run too many concurrent users.

To give you an idea, while both BV and X3 can be used by a small number of users, BV's maximum number of users for its Standard version is 10, and its client-server version 100, whereas Sage ERP X3 can handle up to 2000 concurrent users. Adding users to BV may require an upgrade in hardware and system capacities, while in X3 it's a matter of calling your business partner (like The Answer Company) and making some simple arrangements.

Access to Additional Functionality

Modern ERP solutions like Sage ERP X3 are designed to connect seamless with other Sage solutions, such as Sage CRM, Sage HRMS, Sage Enterprise Intelligence, Sage Inventory Advisor, Sage Billing and Payments, and mobility solutions like Sage Mobile Sales and Services.

These solutions offer additional functionality that can easily be accessed by companies on modern ERP solutions like Sage ERP X3. Whether a small or mid-sized business is looking to attract new customers, improve cash flow, or make simple processes more efficient, it can now rely on expanding their information systems via the cloud.

Sage's Data Cloud are a way for businesses to attain additional functionality online. Businesses can leverage the power of cloud technology by accessing readily deployable cloud solutions. These additional services connect seamlessly with Sage solutions, protecting investments made on the existing ERP system while expanding its capabilities.

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While scalability isn't the only important factor when it comes to choosing a software solution for your business, it is the most important when it comes to a couple areas of managing your business, which are:

1. Ensuring growth will not be slowed down by your current system capacities
2. Avoiding spending tens of thousands of dollars to overcome said system's limitations.

Moving to a system like Sage ERP X3 may just be the last time you will have to move systems, no matter how large your company grows. That is also a pretty effective way to guarantee that your initial investments will continue to pay off in the long term.

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The Answer Company is a leading supplier of business management software and technology consulting services. Since 1995, we have been helping businesses answer the difficult questions with regards to investments in technology and information systems. Our goal is to make businesses more successful at what they do and gain confidence to make profitable moves in their respective industries. Our software solutions support accounting, operations, customer relationship management, human resources, time tracking, merchant services, and the specialized needs of the manufacturing, construction, distribution, healthcare, nonprofit, and real estate industries.

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