ERP Features Guide

for

Extraction Solutions

ERP Packages at a Glance

Extraction Starter Package

7 -20 users

Single location

Sage X3 Cloud

Out of the box

CTLS

Traceability and recall modules

Standard Training and Self-Help Tools

Industry Standard/Templated business process

Extraction Advanced Package

20+ users

Multi-country

Sage X3 Cloud

Warehousing module

CTLS

Traceability and recall modules

B300 reporting

Min/Max Planning

Customized Training and Documentation

Gap Business Process Review

Available ERP Features

The following table lists features that are considered essential for extraction operations. Additional features are available and can be inquired about through either email sent to info@pannimanagement.com or by calling us directly in North America +1-403-440-1113.

- available
- − not available

	Starter	Advanced
Finance		
General ledger, accounts payable and receivable	•	•
Dimension based accounting, including pre-populated chart of accounts	−	•
Sales, purchase, inventory, closing and automated recurring journals	•	•
Fiscal year end close	•	•
Tax calculation and management	•	•
Advanced bank statement import	−	•
Credit policy management (manual)	−	•
Invoicing, including credit and debit notes	•	•
Budget and commitments	−	•
Fixed Asset management	−	•
ACH/EFT	−	•
Multi-site, Multi-company	−	•
Positive pay, Lockbox, collections, and reminders	−	•
Consolidations	−	•
Automated Reconciliations	−	•
Automated expense management and workflows, payment processing	−	•

	Starter	Advanced

Purchasing

Feature	Starter	Advanced
Supplier ranking and quality monitoring	•	•
Management of discounts/bank charges	•	•
Configurable price structure and multi-criteria prices	•	•
Purchase order, invoice, receipt, direct invoice with automatic or manual numbering and unlimited links between documents	•	•
Advanced Purchasing Costs Management	–	•
Request for Quotation/Call for tenders	–	•
Purchase requests	–	•
Expenditure authorization	–	•
Rider management, validation and signature process, reorder suggestions	–	•
User authorization based on payment levels	–	•
Materials Requisition Planning (MRP)	–	•

Products/Stock

Feature	Starter	Advanced
Products and product categories	•	•
Management of lot and sub-lot numbers	•	•
Stock units with fixed conversion factors	•	•
Lot Cost and Average Cost	•	•
Traceability	•	•
Stock inquiries	•	•
Packing units with fixed or variable conversion factors	•	•
Multi-location management	•	•
Stock count management	•	•
Valuation including standard price, revised standard price, FIFO price, LIFO price, weighted average price, last price	–	•
Stock analysis including valuation, history, and turnover	•	•
Receipts, shipments, returns	•	•

Quality Assurance

Feature	Starter	Advanced
Use-by, expiry date and re-inspection date management	•	•
Stock status management	•	•
Quality control procedures and record creation	•	•

Sales Management

Feature	Starter	Advanced
Customer management including multiple delivery points and bank details	•	•
Discounts and bank charges	•	•
Multi-type and multi-due date payment modes with management of alternative payment modes	–	•
Reminder Management	–	•
Commercial monitoring and risk analysis	–	•

	Starter	Advanced
Credit control	•	•
Sales Representative and Prospect Management	–	•
Configurable multi-criteria prices	–	•
Theoretical price, floor price, minimum margin, loan, direct order authorization	–	•
Price management by currency, coefficient, quantity	•	•
Promotion management	–	•
Price catalogue and import	•	•
Order/delivery/invoice commercial documents	•	•
Quote management	•	•
Sales order and backorder management	•	•
Customer reservations	•	•
Stock allocations	•	•

Production Management

	Starter	Advanced
Bill of materials management	•	•
Calendars, work centers, routings, work orders	•	•
Feasibility testing, material and load updates, scheduling, order smoothing	–	•
Automatic processes/mass updates	–	•
Reorder management	•	•
Production costing including machine time	•	•
Production costing including overhead, standard cost and project cost calculation	–	•
Non-conformance management	–	•
Change control management	–	•
Weigh scales	–	•
Production planning	–	•
Production scheduler	–	•
Collection of labor time and direct labor	•	•
Shop floor tracking	–	•
Project Management	–	•
Advanced Warehousing	–	•

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