

# NexTec Group Advanced Solutions

NexTec Group's Advanced Manufacturing, Advanced Financials and Advanced Quality solutions helps manufacturers streamline operational efficiency and manage growth. It is a unified platform that is configured by NexTec experts who deliver a complete business solution.

For customers requiring additional features to take their business to the next level, NexTec is proud to offer Advanced Manufacturing, Advanced Financials and Advanced Quality solutions. These feature sets work with Sage X3 to extend the functionality of our customers' systems and transform their operations.

With Advanced Manufacturing, Sage X3 customers receive all the additional features and modules they need to optimize their operations. This includes the features found in Advanced Financials and Advanced Quality.

NexTec's Advanced Financials solution provides customers with the finance-specific features they need without additional manufacturing or quality functionality they may not be ready for.

With our Advanced Quality solution, customers have access to the quality-exclusive features they require to ensure safety and compliance.

Product Features	Advanced Manufacturing	Advanced Financials	Advanced Quality
Online Help	✓	✓	✓
ACH and EFT Payments	✓	✓	
AR Credit Management	✓	✓	
Business Partner Notes	✓	✓	✓
Catch Weight Management	✓		
Certificate of Analysis	✓		✓
Commission Workbench	✓	✓	
Demand Management and Forecasting	✓		
Dock Scheduling	✓		
Enhanced Production Management	✓		
Enhanced Quality Management	✓		✓
Lot Attributes	✓		✓
Product Recall	✓		✓
Rebates and Royalties	✓		
Retains and Reference Samples	✓		✓
Scan and Pack	✓		
Supplier Document Management	✓		✓

# ADVANCED SOLUTION KEY FEATURES

## ACH SUPPLIER PAYMENTS <sup>AM AF</sup>

With Automated Clearing House (ACH) functionality, users can transfer money from one bank account to another without using paper checks, credit card networks, wire transfers or cash. Users configure suppliers and banks for payments, then the payments are put into NACHA formatted files. With ACH, users can prep payments easily, create a log of payment transactions to be used for monthly close, ensure suppliers are paid on a timely basis and streamline the delivery of payments by eliminating check writing and the wait time for checks to be cashed.

## AR CREDIT MANAGEMENT <sup>AM AF</sup>

The Open AR credit management feature provides an additional option/control when evaluating a customer's during order processing. It provides the ability to review a customer's receivables to see if they have any invoices that have exceeded an aging tolerance. The aging tolerance can be defined by company or by customer and work in conjunction with the other credit management tools. This control allows your team with the opportunity to proactively address aging before releasing or shipping additional product.

## BUSINESS PARTNER NOTES <sup>AM AF AQ</sup>

With Business Partner Notes feature, users can increase collaboration across departments and make data retrieval easier and more organized. When users are processing or accessing business partner data, the business partner notes functionality allows them to create new notes or edit existing ones. Notes can be entered in real-time and categorized according to predefined categories, which helps streamline the collaboration process. The feature is delivered with predefined options in the AP/AR accounting, sales, purchasing common data and CRM activity modules.

## CATCH WEIGHT MANAGEMENT\* <sup>AM</sup>

With Catch Weight Management, users can track, record and account for catch weight products throughout the purchasing, stock management, production and fulfillment processes. Unlike other solutions on the market, Catch Weight Management simplifies how users track actual weight products using three different units of measure: pallet, case and piece. This provides ultimate flexibility for processors looking to streamline inventory handling, improve production efficiency and meet even the most nuanced of customer demands.

Rather than tracking actual weights as soon as products are received, Catch Weight Management allows users to manage actual weights only when needed and to otherwise work with average weights for greater efficiency. Catch Weight Management is also designed to eliminate or minimize the time spent building or breaking pallets, and scanning, weighing and labelling products.

Catch Weight Management is Automatic Data Collection (ADC) enabled, which ensures that key transactions occurring throughout the user's facility are managed accurately and in real time. This feature, when used in conjunction with barcodes and scanning, helps streamline and simplify transactions and significantly reduces human error.

*\*An addendum with a more thorough breakdown of Catch Weight Management functionality is available.*

## CERTIFICATE OF ANALYSIS PROCESSING <sup>AM AQ</sup>

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With advanced Certificate of Analysis (COA) functionality, you are able to define a COA that matches your company's or your customer's standard and may contain all or a subset of the test group. This functionality provides multiple controls for managing and controlling the COA content, providing you with essential quality data in an easily digestible format understood by the recipient. FoodBusiness ERP's COA functionality also contains lot inheritance logic, allowing you to structure your formulas or BOMs in a way that works best for your business. Additionally, you have multiple options for printing a COA document for any stock belonging to a product that has been tested and set up for COA processing.

## COMMISSIONS WORKBENCH <sup>AM AF</sup>

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The Commissions Workbench feature gives users the ability to review, approve and adjust commissions being paid to those outside of the organization for improved tracking and visibility. With Commissions Workbench, the system automates the commissions process to create invoices and payables. This gives users the ability to keep track of commissions, summarize payments based on a list of pre-determined criteria and generate an invoice.

## CUSTOMER DOCUMENT MANAGEMENT <sup>AM</sup>

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Take control of customer-facing documents with Customer Document Management functionality. This feature tracks important documents related to production, including specifications, quality plans, contractual agreements and more. It works by managing document requirements for specific time intervals (like on a monthly or bi-weekly basis) and for events (such as orders and deliveries). It also allows users to implement document controls at different levels of operations. Customer Document Management can be used to place holds and blocks during the fulfillment process. This ensures that deliveries do not get to the destination before the required documentation, helping to avoid costly penalties and delays.

Customer Document Management eliminates the need to manage documents manually by automating the process and making document tracking an integral part of the order fulfillment process.

## DEMAND MANAGEMENT AND FORECASTING <sup>AM</sup>

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NexTec's Demand Management and Forecasting functionality gives manufacturers a full end-to-end view of their ordering history and ensures absolute accuracy in terms of production. With advanced Demand Management, users can easily import historical data into Sage X3 and begin capturing, editing and viewing it in relation to new demand data. This information can all be viewed in meaningful real-time visualizations and graphs, helping users make better, quicker decisions.

With advanced Forecasting functionality, manufacturers can use demand history to determine trends and calculation forecasts with provisions for seasonality or by applying a plus or minus percentage to the previous year's values based on high-level business projections. With Forecasting, users can also calculate individual products or SKUs in real time and see the results on a single screen or calculate batches of products or SKUs on a weekly or monthly basis. Forecasting functionality allows users to make manual updates to a forecast, capture a reason code and maintain this adjustment through recalculations. For even more visibility, users can layer market intelligence into forecasts for exceptions to ensure product levels match what's required and view the previous years' demand, seasonal trends and forecasts in one concise graphical view.

## DOCK SCHEDULING <sup>AM</sup>

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With the Dock Scheduling features, users can streamline and automate dock door scheduling to improve traffic flow and increase warehousing efficiency. With the help of graphics, visuals and Gantt charts for real-time scheduling and shipment data management, users can schedule truck arrivals and departures and assign sales orders to dock schedules. The dock schedule ID can then be used in partnership with FoodBusiness ERP's automatic delivery generation function, so the system knows which sales order to match for deliveries. This feature is designed to give customers the tools they need to manage dock scheduling without having to rely on a full-blown transportation management solution while still ensuring next-level product tracking and end-to-end visibility.

## EFT SUPPLIER PAYMENTS <sup>AM AF</sup>

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With Electronic Funds Transfer (EFT) functionality, users can automate supplier payment processes for a streamlined method of transferring money. EFT Supplier Payments functionality generates a bank-compliant EFT file, which can only be used for payments originating from a Canadian bank to a business partner using a Canadian bank; it cannot be used for cross-border transactions. With EFT, users can prep payments easily, create a log of payment transactions to be used for monthly close, ensure suppliers are paid on a timely basis and streamline the delivery of payments by

eliminating cheque writing and the wait time for cheques to be cashed.

## ENHANCED PRODUCTION MANAGEMENT <sup>AM</sup>

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The system enhances production for manufacturers by allowing them to batch, scale and sequence production orders easily and efficiently. Enhancements to batching and scaling functionality allow the user to pre-scale for multiple production orders and easily scale batch sizes up and down while locking component ratios. Users can also consume materials across multiple work orders at once, minimizing time and manual entry, while still maintaining traceability.

Enhanced Production Management functionality manages sequencing based on factors such as product allergens, container size, container color and more. It does this by providing users with tools to define sequencing criteria at the production line level. Once this criteria is defined, the system will select and sort work orders based on assigned attributes. For more flexibility, the system can create sequencing groups, which allow for multiple sequencing criteria to be included. The selection of work orders is then performed in group order and assigned to a sequence list. Dispatch reports provide both high-level overviews and operation and material details as required.

## ENHANCED QUALITY MANAGEMENT <sup>AM AQ</sup>

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With Enhanced Quality Management functionality, users can create audits based on a product, time, frequency or event basis and accommodate non-product related items such as premises, trailer audits, GMP, HACCP and others. The enhanced functionality also allows for different approval layers and accommodates role-based testing and management. This means that a user in a manager role can create an audit, a technician can execute on it and a different user can approve it. This enhanced verification and approval process makes it easier to comply with common industry certifications. Users can also track duration and reasons for downtime, gaining insights to trends in production and maintenance issues.

Additionally, when producing multiple products via a single production process, quality is performed at the work order or batch level. With the Enhanced Quality Management functionality, the test results can be attributed to the lot and shared or inherited with all products that were produced at that time. When quality results are all within specifications, the stock disposition or release process is done while recording the results, allowing the product to move from quality to operational use in less steps. When the results fail within gray areas, you may retest or choose to perform a more detailed analysis to determine product viability.

Role-based workbenches found in Enhanced Quality Management include test assignment, response and approval workbenches, so users can see the tasks that need to be performed in one place without having to jump around in the system. Enhanced reporting functionality also helps improve quality management across the company.

## LOT ATTRIBUTES <sup>AM AQ</sup>

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The system tracks key attributes of lot tracked products and makes this data available to users for accurate, real-time decision making. Users can store multiple attributes and capture these attributes as part of the quality process. This visibility gives users a better understanding of production and helps improve customer service. Lot attribute functionality also helps reduce the risk of errors and the need for multiple data entry, since attributes only need to be entered into the system once.

## PRE-RECEIPT CERTIFICATE OF ANALYSIS <sup>AM AQ</sup>

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The Pre-Receipt COA feature allows you to record the quality data in advance, and streamline the receipt activity. Typical processing places a quality hold on the inventory received until the quality data is recorded, which can cause delays in production or fulfillment activities. If COA results are present, the Pre-Receipt COA feature enables the receipt process to be as simple as an inspection allowing the hold process to be bypassed.

## PRODUCT RECALL MANAGEMENT <sup>AM AQ</sup>

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Users can generate mandatory, voluntary or mock recalls. Users can search all products and lots associated with a recall and track the progress of the recall in a centralized location. To adhere to strict regulatory guidelines, users can freeze affected inventory and provide insights into recalled stock and shipments. To ensure customers are notified immediately of the recall, users can generate CRM calls within Sage X3 for follow up and print recall letters to send to customers who have received recalled products.

## REBATES AND ROYALTIES <sup>AM</sup>

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This powerful operational feature allows users to take control of their rebate processes when they are paying an outside party based on the sales of one or many products. Payment terms to these outside parties can range from a flat fee per unit or based on gross price, net price, etc. To streamline a business's royalty arrangements, NexTec's Rebates and Royalties feature allows users to set and manage a royalty program right in their Sage X3 solution. This new functionality includes several tracking tools and a payment workbench, allowing users to optimize the royalty tracking process and see all activity in a payment period, review it and send it for payables processing.

## RETAINS AND REFERENCE SAMPLE MANAGEMENT <sup>AM AQ</sup>

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This critical feature helps manufacturers easily ensure compliance to mandated retains as part of FDA or GMP standards. It also allows businesses to readily perform internal quality tests by providing either automated or manual audit and test generation capabilities based on current and past production activity. With Retains and Reference Sample Management, sample tests are integrated right into NexTec's Advanced Quality solution, putting the management of test activity – such as bi-weekly stability tests – into standard operating workflows of assignment, response and approval of test results.

With this feature, manufacturers will also be able to use profiles to group samples together (e.g., test samples vs. retain samples), isolate samples via dedicated products, stock status and storage locations to avoid confusion or misuse from active products, convert samples to stock zero value and automatically manage them during sample creation, and pull samples from work in progress to ensure it is within specifications

Additionally, NexTec's Sample Workbench allows users to manage all sample activity from one place and perform activities such as view sample information and make changes, adjust the retain period, manually generate stock audits or tests and print/reprint labels.

## SCAN AND PACK <sup>AM AQ</sup>

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With Scan and Pack functionality, users can manage the process from order to delivery in a single function, better control the packing and shipping process and gain visibility into order progress and fulfillment. At packaging, users scan a product or UPC code into a box and the system will provide a display of the progress against delivery quantities. The system will also show users their progress on that order and how far they are into fulfilling it. Once the order is complete, the system will create the delivery package within the system along with a corresponding label for each box. This helps eliminate manual data entry, speeding up the packaging process and ensuring accuracy and efficiency. Scan and Pack supports single scan formats and keyboard free packing using a wedge scanner.

## SUPPLIER DOCUMENT MANAGEMENT <sup>AM AQ</sup>

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To better control the relationship between manufacturer and supplier, we've created functionality to help streamline the vendor and supplier management process. In the software, users can track documents and any requests for documents easily at the supplier, manufacturer or product level. If a required document has expired, the system can block associated purchase orders and receipts until the requested document is turned over by the supplier. Additionally, triggers in the system notify users when updated supplier paperwork is needed, so manufacturers can ensure documentation is never out of date or incomplete when an auditor shows up.

For multiple suppliers, features in the system make sure product being received is consistent between suppliers so it can be used interchangeably without affecting production. Dashboards of supplier documents provide users with at-a-glance views of spec sheet data, supplier certifications and contractual obligations, which can be easily accessed in real-time.