

**20**  
YEARS

**inixion**

**Customer  
Connect**

# **Customer Event 2026**

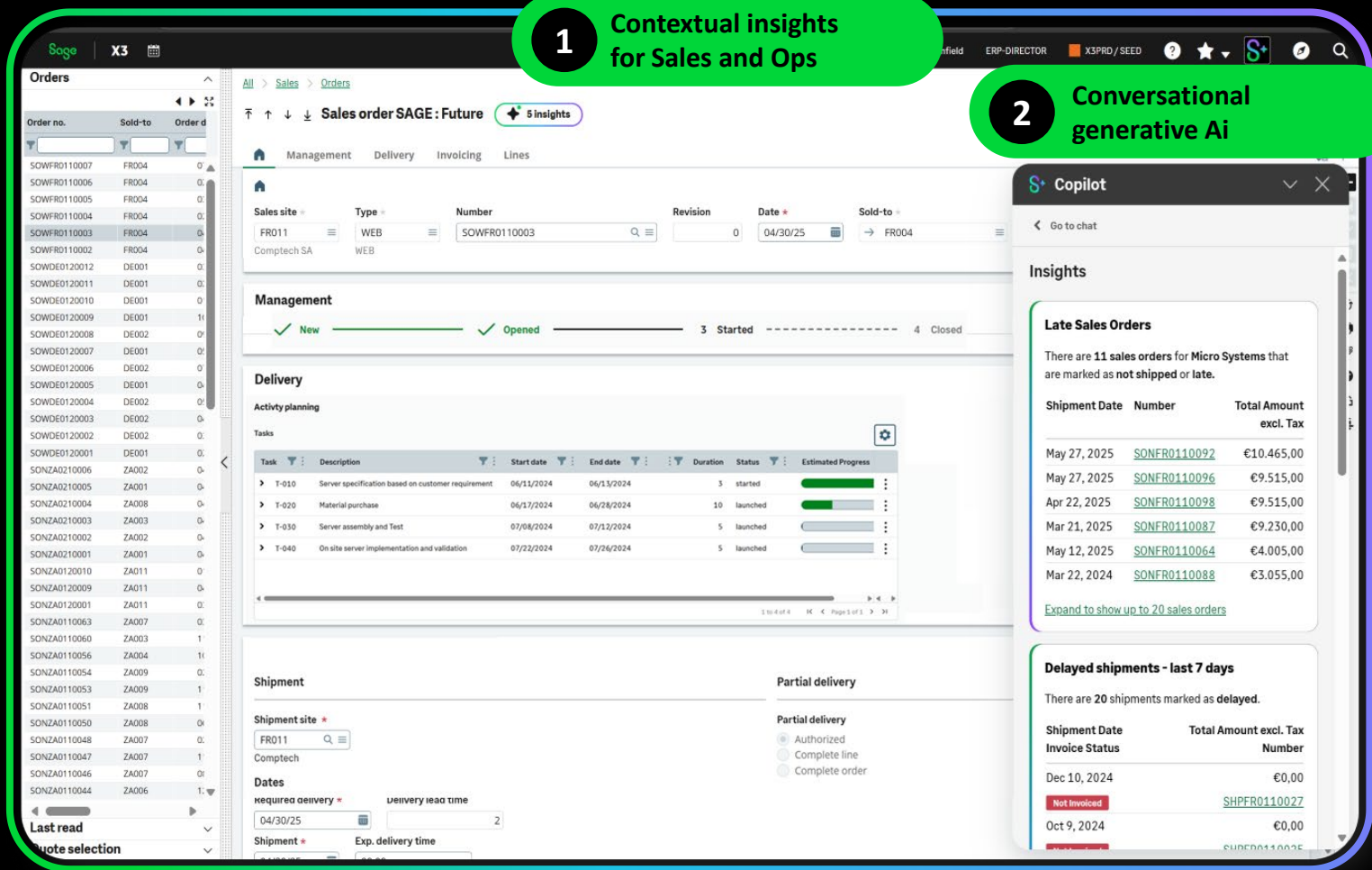
***20 Years Strong: Future Ready***

# Our Ai journey

# Available today (2025 R2)

1 Contextual insights for Sales and Ops

2 Conversational generative Ai



## Available today

- **Conversational Interaction**  
Natural language chat allowing users to query Sage X3 about sales and operations-related events
- **Sales Intelligence & Operational intelligence**  
Real time insights and alerts automatically displayed to users depending on the context for sales and operations

## 2026 R1

- Agentic chat based on MCP, with full data graph exploration capability
- Specialized agent selection by chatbot depending on context
- Agent creation by chatbot and Agent studio
- Contextual insights
- Ai generated dashboards
- Ai and Agent widgets in dashboards
- SBR MS365 (Excel)

## Coming soon

- New workflow tool
- Ai generated workflow
- Developer Experience: Consuming MCP

# Sage X3 Ai – 2026 R1

## 1 Agentic MCP chat explores your data

**Copilot**

Which customers are at risk of churn?  
01:36 AM

Sage Copilot

Based on the customer data, here are **customers at risk of churn**:

**High-Risk Indicators**

**Customers on Hold (23 total)** - Account frozen, indicating payment or relationship issues:

- AE001 - Al Rostamani Communications (Credit: 100,414.4)
- AO002 - Ciclo Belas (Credit: 950,711,545.6)

Ask Copilot a question

Check AI content for inaccuracies. This content is for information purposes and is not professional advice. [Privacy notice](#)

Type your message...

New chat Send

## 2 Specialized Ai agents Agent studio

**Your agents**

Pick an agent. Get help or automate a task!

**Customer Intelligence Agent**

Analyzes customer data to provide comprehensive intelligence briefings including revenue trends, pipeline visibility, delivery performance, and payment status. Creates visualizations and actionable insights for customer-facing.

Ask Copilot a question

## 3 Agent creation by chat

Ask Copilot a question

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Create for me the "Inventory Intelligence Agent" for Sage X3. Mission: Help operations, supply chain, purchasing, and finance users make fast, confident inventory decisions inside Sage X3 by combining (1) inventory & stock theory and (2) Sage X3 domain logic, parameters, and transactions. You must be practical, explainable, and action-oriented.

**PRIMARY OUTCOMES** (what success looks like)

- 1) Diagnose inventory health: service risk, stockouts, overstocks, dormant/obsolete stock, expiry exposure, and valuation risk.
- 2) Recommend concrete actions: replenish, expedite, transfer, substitute, reclassify, adjust planning parameters, correct master data, and prioritize execution.
- 3) Provide explainable reasoning: show key drivers, formulas, and assumptions; do not hide uncertainty.
- 4) When proposing changes to X3 data, ALWAYS show exactly what would change and ask for explicit user confirmation before any change is executed.

## 4 Contextual insights

Jul 29, 2024 SHPFRO120003 €10,819.80  
Jun 5, 2024 SHPFRO120015 €196.45  
Jun 10, 2024 SHFGR0210006 €240.62

**Partially delivered sales orders (3)**

There are 3 sales orders that have items left to deliver, and are marked as **partially delivered**. (Amounts exclusive of tax).

Shipment date	Number	Remaining amount to Del.
Mar 11, 2023	SONFR0120003	€826.38
Jan 10, 2024	SONFR0120013	€9,940.90
Jan 25, 2024	SONFR0120003	€2,916.09

**Open quotes and estimates**

There are 2 open quotes and estimates for **Urban Cycle**.

Date	Number	Amount
Sep 10, 2024	FR0131809SQN00000001	€41,500.00
Sep 10, 2024	QTENA0130002	\$41,500.00

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## 5 Ai Dashboards

**Operations**

**Purchasing Manager Dashboard**

Key Performance Indicators (KPIs):

- Low # of Purchase Orders
- High # of Purchase Orders
- Recent Purchase Orders
- Key Purchasing Insights

Performance Metrics: Purchase Orders by Month, Purchase Amount by Supplier, Pending/Invoiced Approvals

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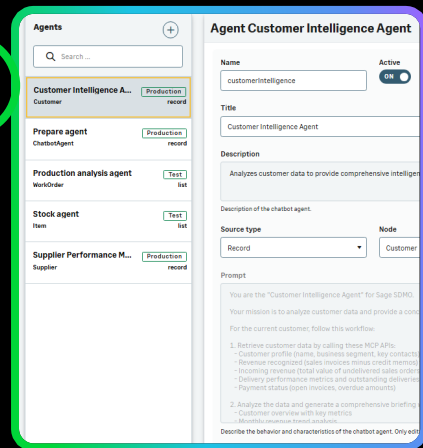
# Beyond 2026 R1

## Insights created by chat, Insights studio and the new Workflow tool

### Conversational agent selection

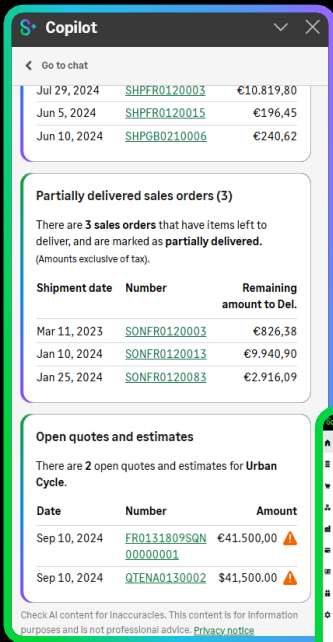
Select your preferred agent in the chat box to explore and analyse your business data

2026 R1



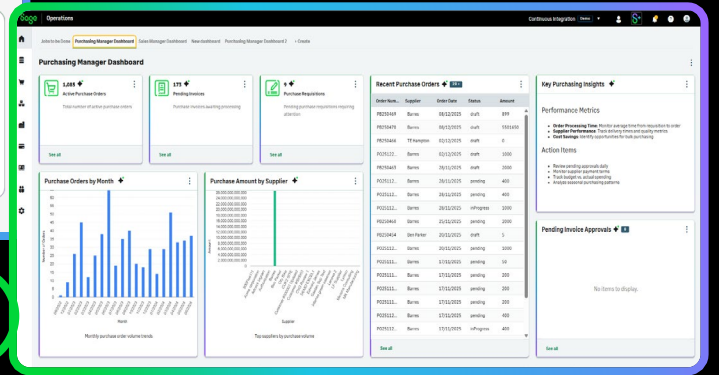
### Agent Studio

Design your own agents and make them available to your users



### Create Insights

Ask your agents to design insights for you and edit them in the Insights Studio

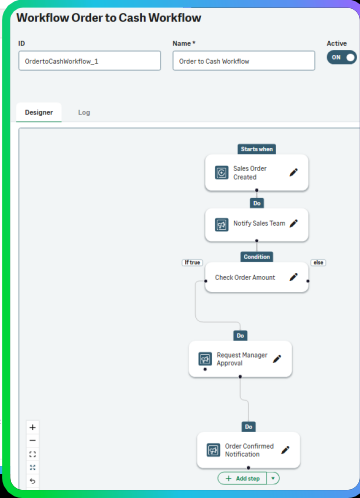


2026 R1

### Dashboards

Ask your agent to design new dashboards for you Insert Ai agents or prompts in your dashboards

2026 R1



### Workflow automation with the new workflow tool

Graphical workflow tool to automate business flows and orchestrate Ai agents, rules, and users

# Sage Business Reporting

## Your Sage X3 Copilot in Microsoft 365

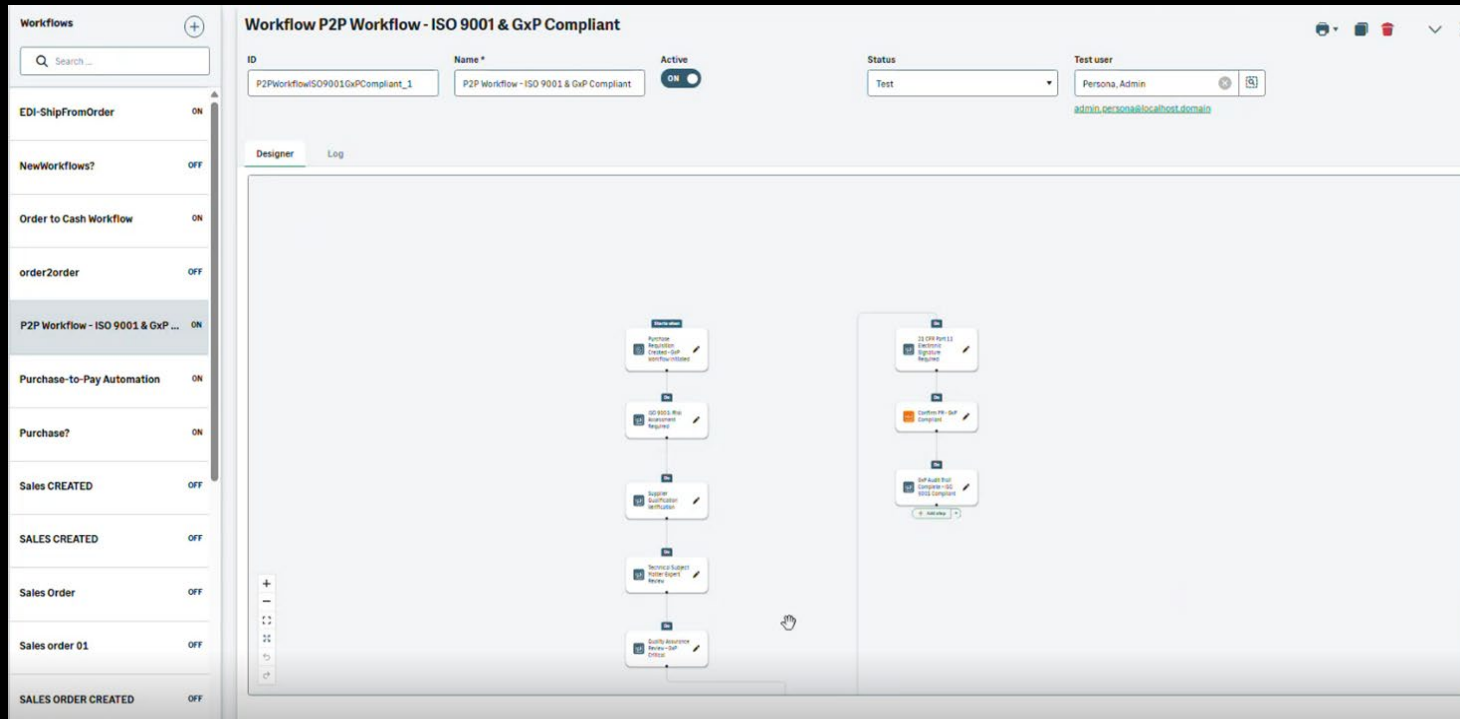
Imagine Sage X3 Copilot in Excel 365, your 24/7 financial reporting expert, always ready to assist.

- Your reports are **custom-built** to match your needs and preferences
- Your results are explained with **clarity and intelligence**
- **Your decisions** are guided by relevant, data-driven recommendations



# Coming soon

## New Workflow tool and Workflow designer agent



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# Sage Supply Chain Intelligence

## Enabling end-to-end visibility integrated with Sage X3

### Coming soon (Available US)

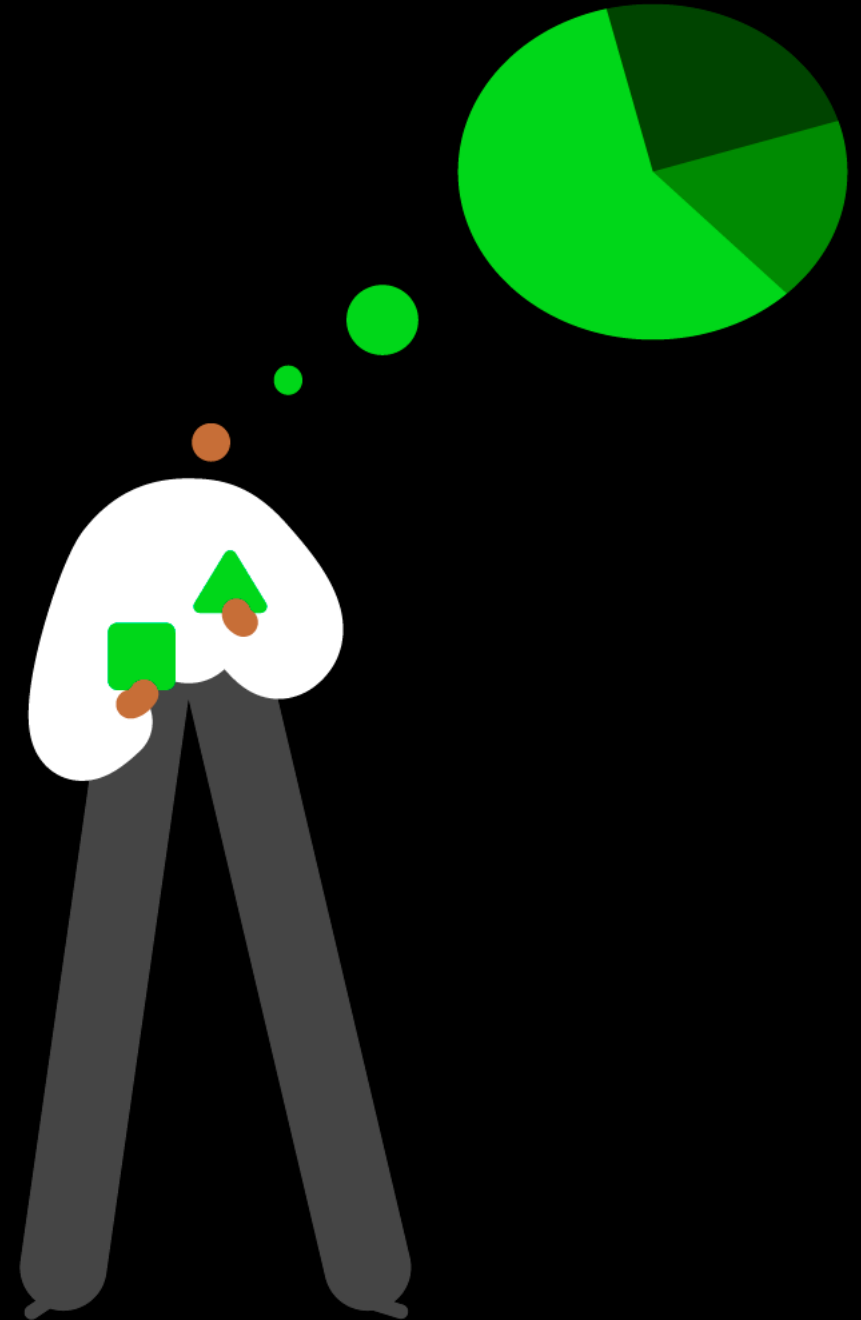
- Create and **manage POs in Sage X3 or SSCI** with real-time sync.
- Build **flexible PO workflows** for easy updates and approvals.
- **Collaborate with vendors** to edit, cancel, or complete POs.

### Coming Soon (2026)

- Expanded integration for **RFQs, shipments, deliveries, and supplier price lists.**

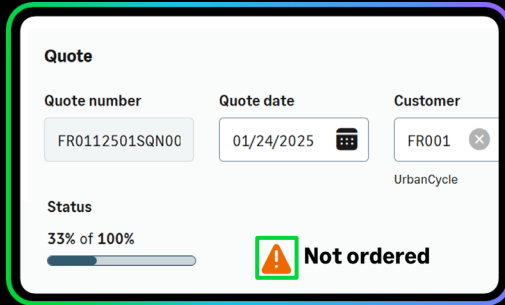


# Elevating the user experience



# Elevating your user experience

## Continuous improvement driven by Ai and innovation

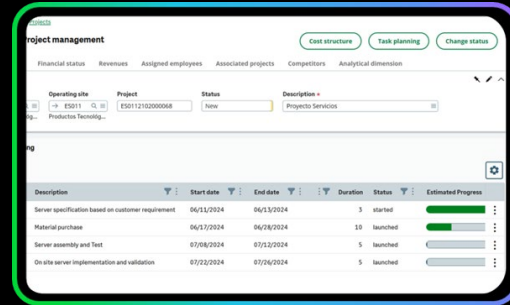


### Simplification

Simplify information architecture and business flows

Simplify dashboards

Simplify workflow rules



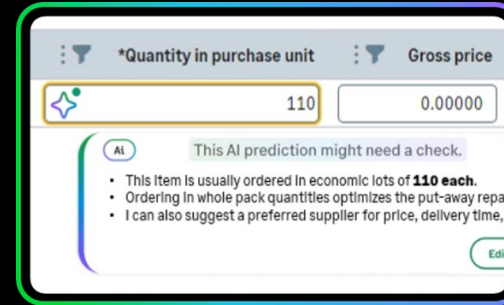
### New components

Visual components in Sage X3 screens

New dashboards

New graphical workflow

New X3 Builder pages



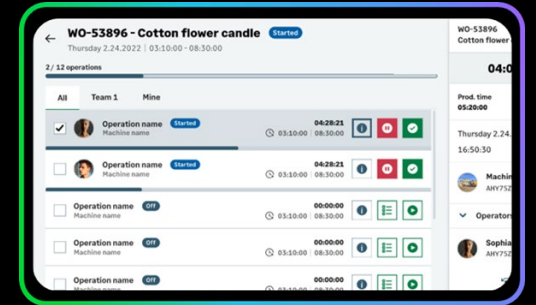
### AI assisted

Copilot & Insights

AI-assisted workflow and dashboards

AI-assisted setup

AI-assisted coding



### User interface

Readability and usability enhancements

Performance and efficiency enhancements

New Visual Processes

# User experience

## 1 Contextual AI insights

## 2 AI assistance

## 3 Information architecture

## 5 Mobile Automation

## 4 New dashboards

## Recently delivered

- Readability and colour enhancements
- Auto-collapse sections
- Screen rendering performance
- New icons
- Grid management enhancements
- Class / representation enhancements

## 2026

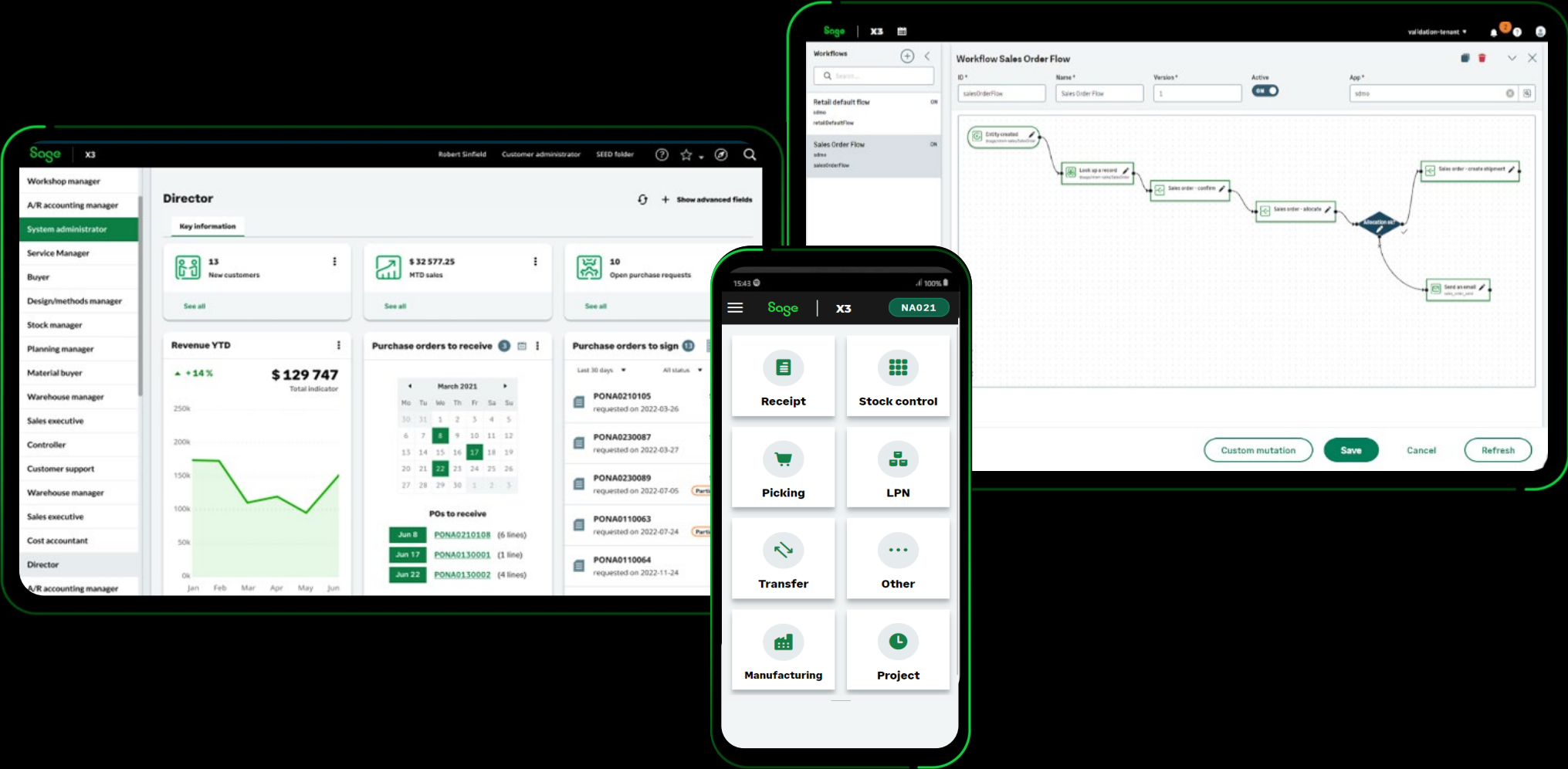
- New components in Sage X3 screens
- New UI pages
- New Dashboards
- Simplification: Dashboards
- Simplification: First business flows
- Simplification: User access rights

## 2027+

- New graphical agentic workflow
- New visual processes
- Simplification: Continued
- Simplification and modernization: Attachments, Printing

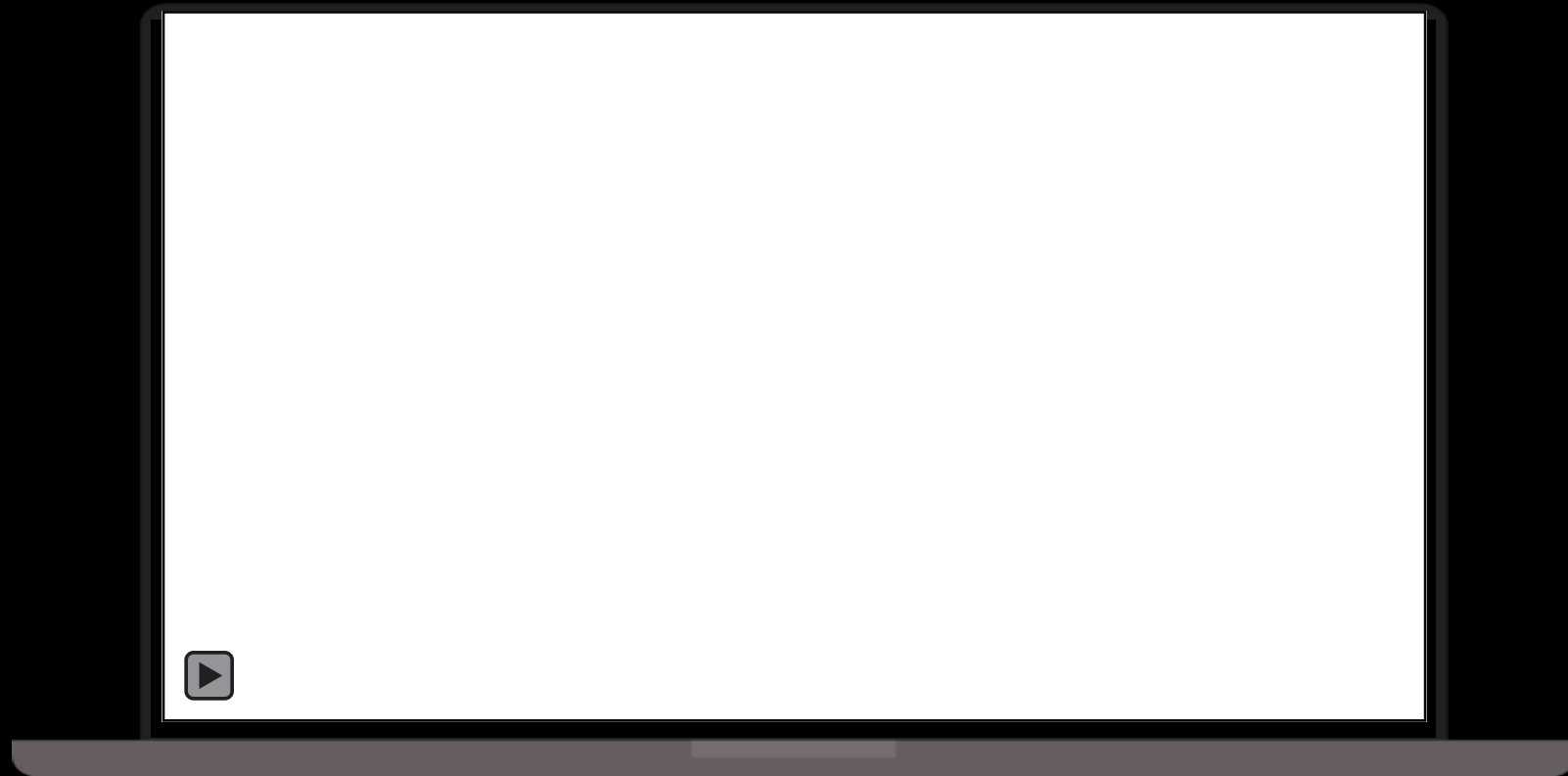
# User experience

## New components in the Sage X3 user interface



# User experience

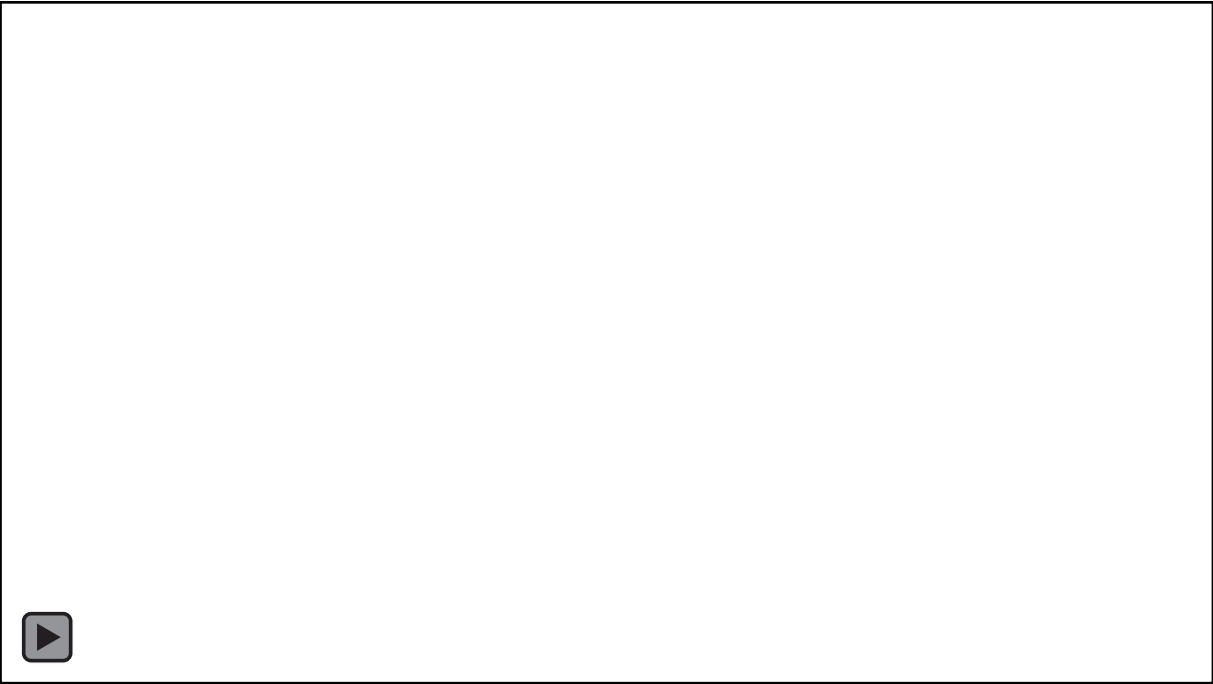
## The new dashboards (2026 R1)



# User experience

## The new Workflow tool

The screenshot displays the Sage Workflow Designer interface for a workflow titled "Sales order created". The interface is divided into "Designer" and "Execution" tabs. The workflow starts with a "Starts when" trigger "Sales order created", followed by a "Do" step "Confirm sales order". A "Condition" step "Total amount < 1,000" branches the flow into two paths: "If yes" and "If no". The "If yes" path includes "Do" steps: "Send customer email sales\_order\_send", "Sales order allocation", and "Sales order shipment". The "If no" path includes a "Do" step "Send no to sales". A callout box titled "Send purchase order" is open, showing fields for "Template" (Purchase Order Template), "From" (management.management@sage.com), "To" (Diana Russel (user.dianerussel@sage.com)), "Subject" (Estimate Purchase Order Delivery Date), and "Attachments" (Purchase\_Order.pdf). Three callout boxes highlight key features: "1 Automation and personalisation" points to the workflow steps, "2 Emails / Notifications" points to the email step, and "3 Customisable in-product alerts" points to the bottom right corner of the interface.



# Thank you.

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