

20
YEARS

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**Customer
Connect**

Customer Event 2026

20 Years Strong: Future Ready

Sage X3 Update

- Our vision
- Sage X3 Roadmap and 2026 R1 Highlights
- Break
- Sage X3 AI: 2026 and Beyond
- User Experience



Our vision

Make Sage X3 the best, future-ready **SaaS ERP Platform** for midsize and large enterprises that need **wide and deep functional coverage** and **advanced tailoring and customization capabilities**.

Our strategy

Rearchitect Sage X3 by modernizing the platform, reduce cost of ownership, and publish the SaaS ERP platform of the future.

Revolutionize our **personalization and development tools** to preserve and reinforce Sage X3 tailoring capabilities at the heart of its success.

Transform Sage X3 into a **strongly integrated ecosystem** that contains native features, services, mobile applications, and best-of-breed add-ons and third-party solutions, all supplied through a global marketplace.

Artificial Intelligence at the heart of ERP business flows and automation.

Our vision



Flexible cloud ERP platform with an ecosystem of **apps, add-ons, and services**, offered through a marketplace and easy to implement.

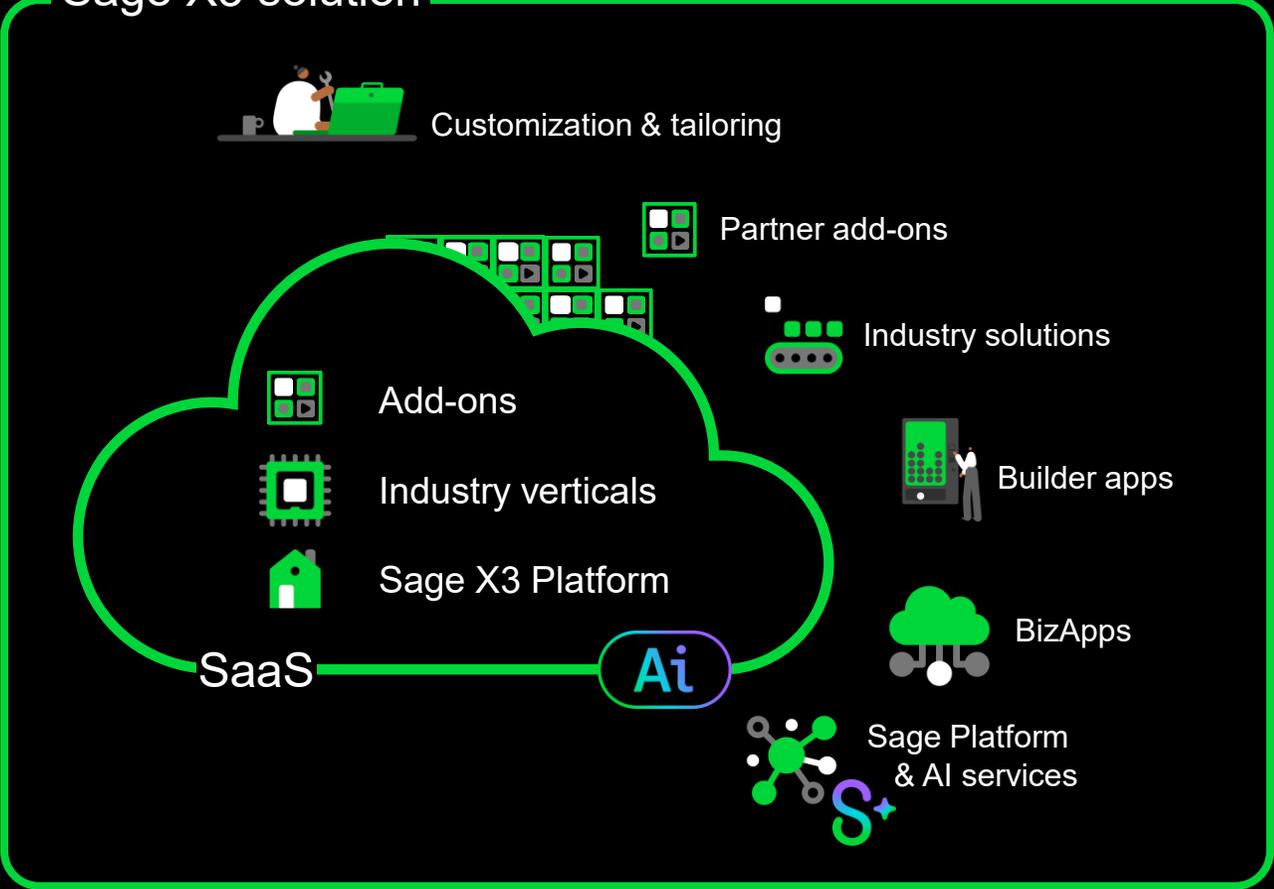


Major strength: The capacity to **customise and to verticalize** to provide the right solution.



High-value AI and Automation solutions, natively connected to an ecosystem of Sage Network services.

Sage X3 solution



Our Vision

Key priorities

Your feedback drives our priorities



Platform modernization

- Sage X3 Cloud
- Sage X3 Builder
- Safe Customisation Framework
- Performance



Ai & automation

- Sage Copilot
- AP/AR Automation
- Sage Business Reporting (SBR)
- New Workflow tool



User experience

- Interface enhancements
- New UI components
- New Dashboards
- Simplification
- Accessibility



Purpose-built industry solutions

- Sage Network Services
- Shop Floor control
- Supply Chain Intelligence
- Preventive maintenance
- ...

GraphQL API / X3 Builder / XTreeM

Sage X3 roadmap overview

	2026 R1	Planned (estimated)	Direction
AI and automation	<ul style="list-style-type: none"> Sage Copilot MCP Agents and Agent Studio Ai-generated dashboards Ai widgets 	<ul style="list-style-type: none"> AI-generated insights Insights studio New Workflow tool AI-generated workflow 	<ul style="list-style-type: none"> No-code dynamic UI AI-generated, context based
User experience	<ul style="list-style-type: none"> Next Gen Dashboards Next Gen User Interface Simplification: Batch jobs, log files New icons 	<ul style="list-style-type: none"> New UI components New Visual Processes Simplification: Access rights Lock management Attachments (1) 	<ul style="list-style-type: none"> Themes and personalisation Accessibility New Print Service (replacement of CR) In-production notifications Attachments (2)
Safe Customisation Framework	<ul style="list-style-type: none"> Documentation VS Code IDE New personalisation features (1) 	<ul style="list-style-type: none"> AI coding New developer tools New personalisation features (2) 	<ul style="list-style-type: none"> Delta patching New patcher & metadata management
Mobile Automation and X3 Builder	<ul style="list-style-type: none"> Extended customisation capabilities Extended GraphQL API (1) Advanced X3 Builder Developer Studio with AI capabilities and Page Studio Mobile Automation Warehousing (2) Mobile Automation composite codes Receipts by container X3 Services Multi-instance & Linux support 	<ul style="list-style-type: none"> Completed GraphQL API (2) AI coding (2) Mobile Automation Warehousing (3) Mobile Automation blind receipts Picking and putaway enhancements 	<ul style="list-style-type: none"> Builder app marketplace
Purpose-built solutions	<ul style="list-style-type: none"> SBR Excel AI Shop-Floor pin code sign-in 	<ul style="list-style-type: none"> Sage Supply Chain Intelligence (WW) SBR Word, PowerPoint, Teams 	<ul style="list-style-type: none"> Pick, pack & ship Shop-Floor material views, QA, Team mgt
Finance automation and compliance	<ul style="list-style-type: none"> E-invoicing (1) AP Automation (V1) 	<ul style="list-style-type: none"> E-invoicing (2) AP Automation 3-way matching AR Automation 	<ul style="list-style-type: none"> E-invoicing (3) Bank feeds Payments

Sage X3 Cloud

A future-ready platform



Service & Security

24/7 Availability: Our services are always available with robust disaster recovery and uptime.

Managed by Sage: Infrastructure, monitoring, compliance and security, and platform updates guaranteed by the Vendor.

Cloud Portal: Enhanced visibility and management of your instances.



AI and modernisation

Continuous Innovation: Early access to the latest features and updates for you and for your customers.

AI Experience: Seamless integration with Sage AI Copilot and the agentic experience for X3.

Sage Network: Natively connected to Sage Network and XTreeM Cloud services for Sage X3.



Customisation without compromise

Safe Customisation Framework: Enabling more personalisation and customisation in Sage X3 without the hassle.

Sage X3 Builder: A new interface for Sage X3 with a refreshed, elevated user experience.

Break & Networking

Back at 11:20

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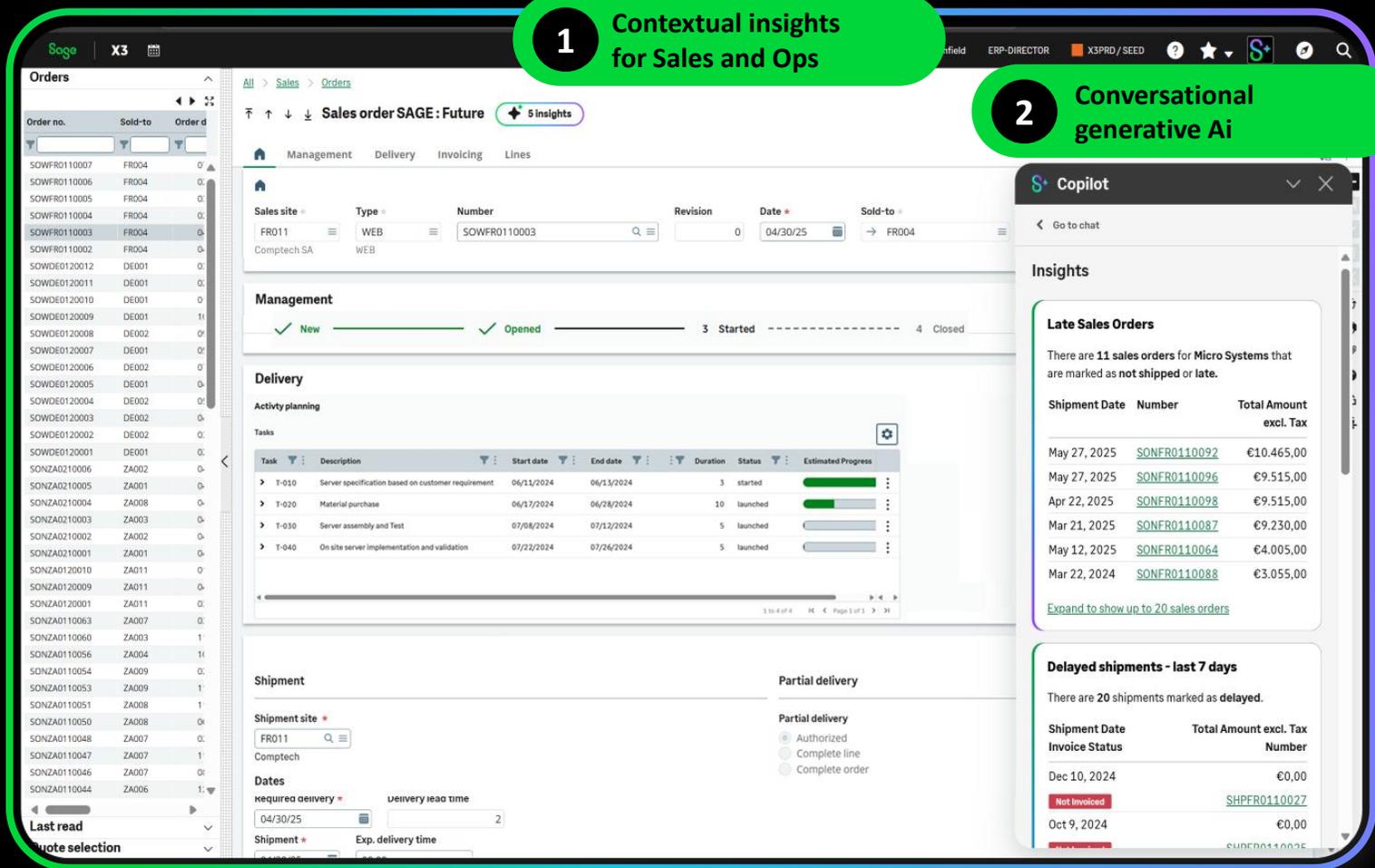


Our Ai journey

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)

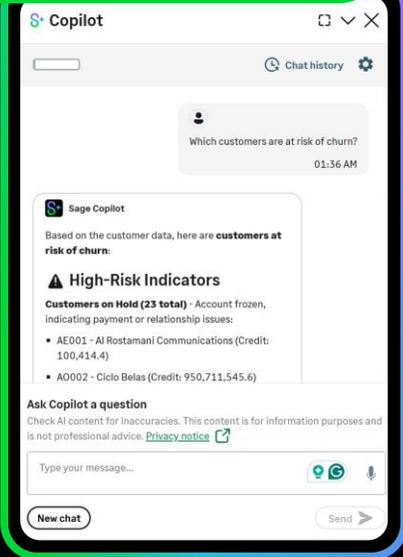
Coming soon

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

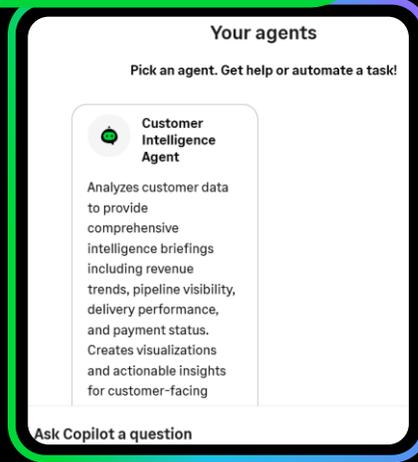


Sage X3 Ai – 2026 R1

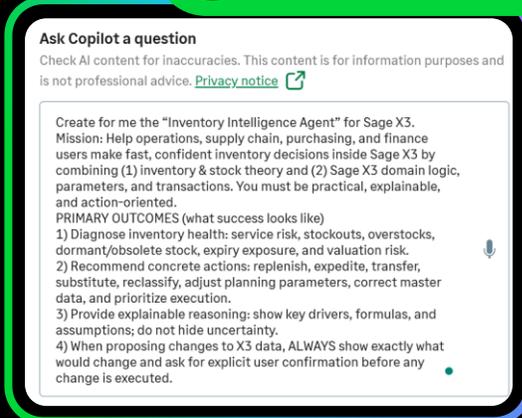
1 Agentic MCP chat explores your data



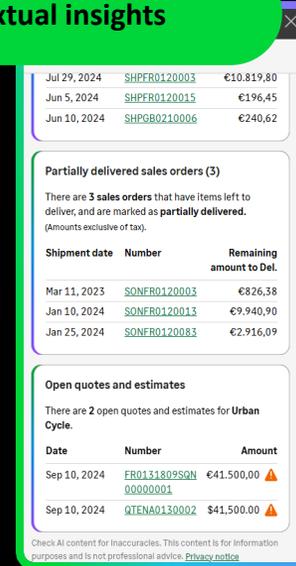
2 Specialized Ai agents Agent studio



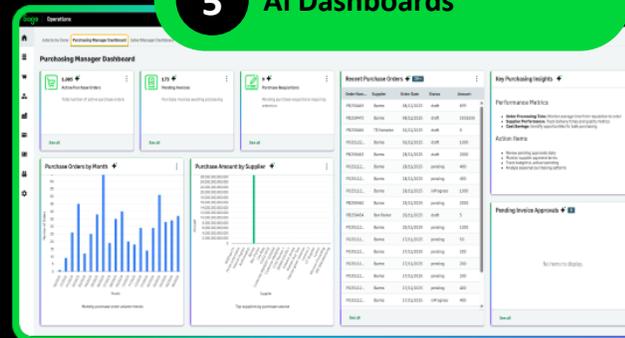
3 Agent creation by chat



4 Contextual insights



5 Ai Dashboards



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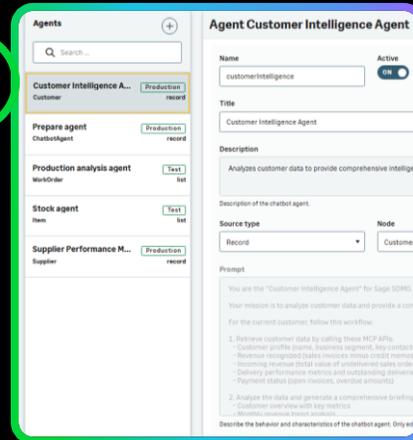
Beyond 2026 R1

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

Conversational agent selection

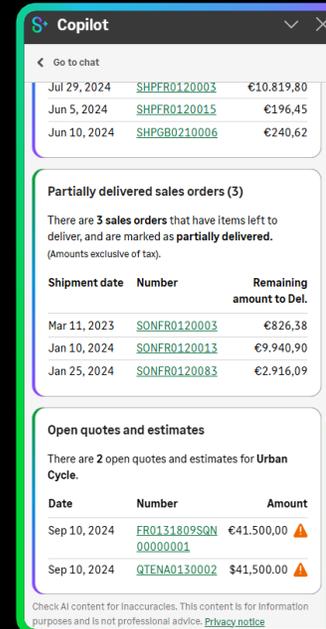
Select your preferred agent in the chat box to explore and analyse your business data

2026 R1



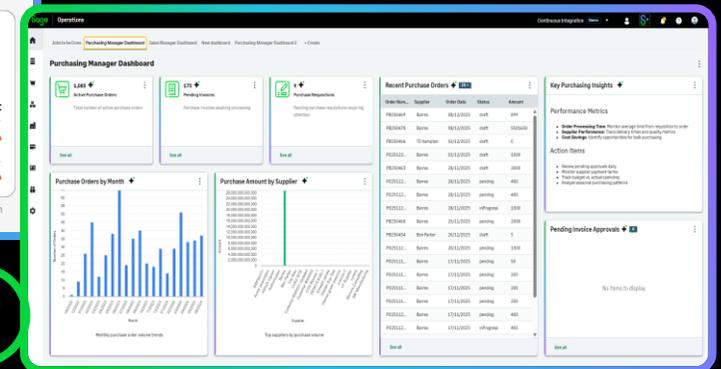
Agent Studio

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



Dashboards

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

2026 R1

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.

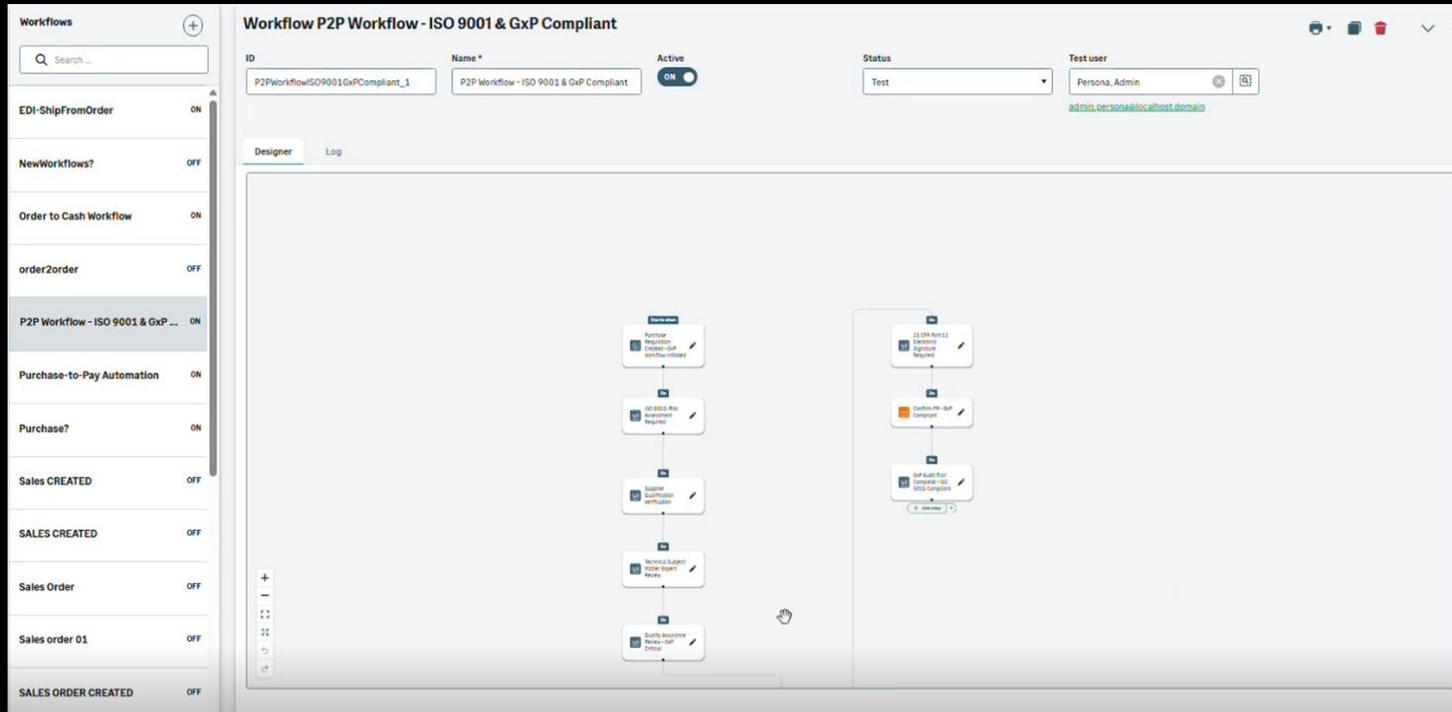
- Your reports are **custom-built** to match your needs and preferences
- Your results are explained with **clarity and intelligence**
- Your **decisions** are guided by relevant, data-driven recommendations

The screenshot displays the Sage Business Reporting interface within Microsoft Excel 365. The main window shows a financial report for 'Car Wash Operations - Quarterly Financial Report 2025'. The report is structured with columns for Q1 2025, Q2 2025, Q3 2025, and Q4 2025. The data is organized into sections: Revenue Analysis, Direct Operating Costs, and Operating Expenses. The Sage Copilot chat window on the right provides assistance and recommendations, such as 'Perfect! A quarterly financial report for 2025 will give you excellent strategic oversight of your car wash operations. Let me create a professional structure that tracks your key performance metrics by quarter. Ready for me to create the structure?' and 'Now I'll create a comprehensive quarterly financial report structure for your car wash business in 2025, with Barcelona-inspired professional formatting:'. The chat window also shows a 'Processing...' status and a 'Chat with your Sage Copilot' section with a search bar.

	Q1 2025	Q2 2025	Q3 2025	Q4 2025
REVENUE ANALYSIS				
Car Wash Services	7010.7019	0	0	0
Additional Services	7020.7029	0	0	0
Retail Products	7030.7039	0	0	0
TOTAL REVENUE	0	0	0	0
DIRECT OPERATING COSTS				
Supplies & Chemicals	6010.6019	0	0	0
Utilities (Water/Electric)	6020.6029	0	0	0
Equipment Maintenance	6030.6039	0	0	0
Direct Labor	6040.6049	0	0	0
TOTAL DIRECT COSTS	0	0	0	0
GROSS PROFIT	0	0	0	0
OPERATING EXPENSES				
Rent & Facilities	6100.6109	0	0	0
Insurance	6110.6119	0	0	0
Marketing & Advertising	6120.6129	0	0	0
Administrative Costs	6130.6139	0	0	0
TOTAL OPERATING EXPENSES	0	0	0	0
OPERATING PROFIT (EBITDA)	0	0	0	0

Coming soon

New Workflow tool and Workflow designer agent



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Coming soon

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Sage Supply Chain Intelligence

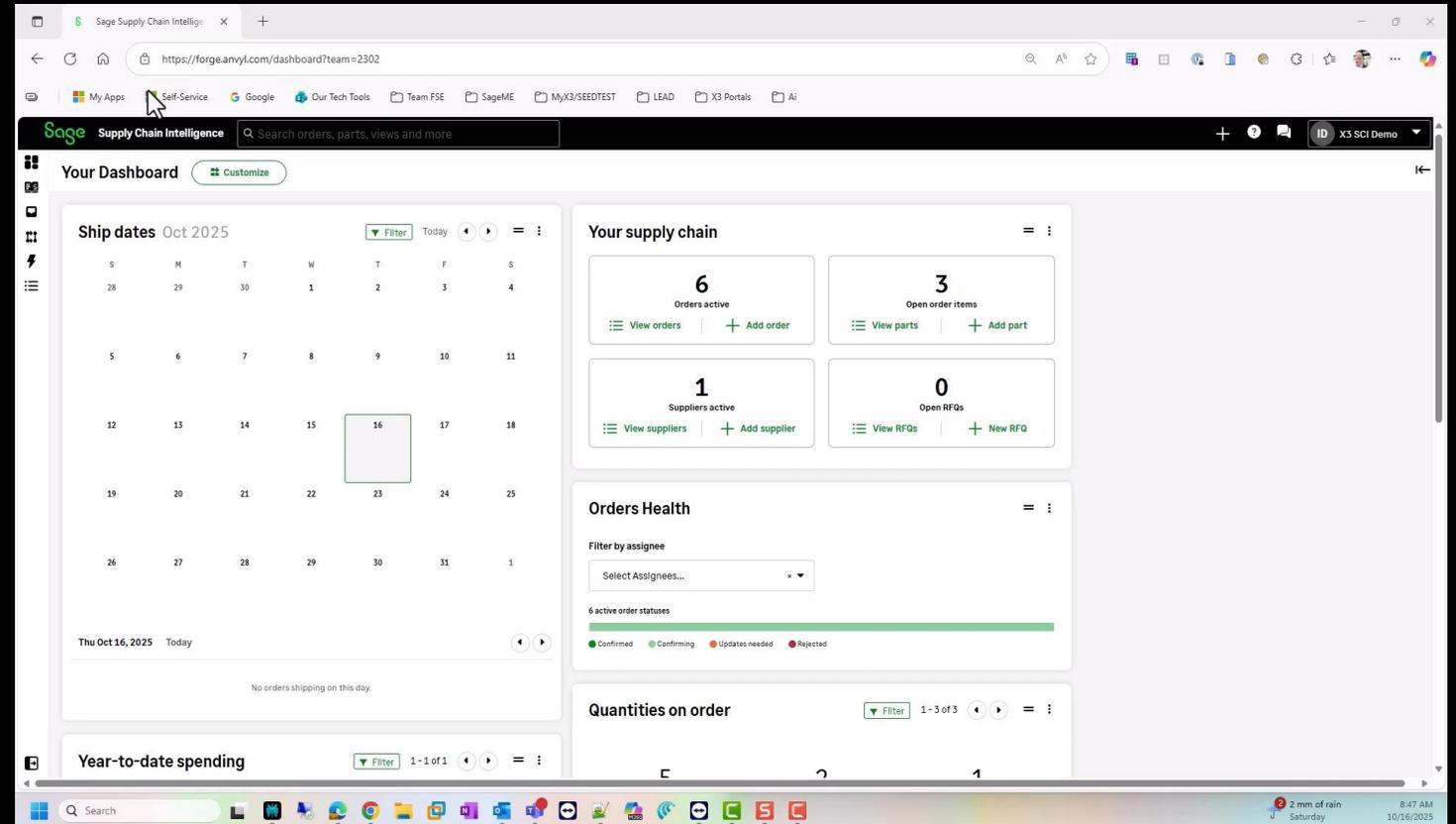
Enabling end-to-end visibility integrated with Sage X3

Coming soon (Available US)

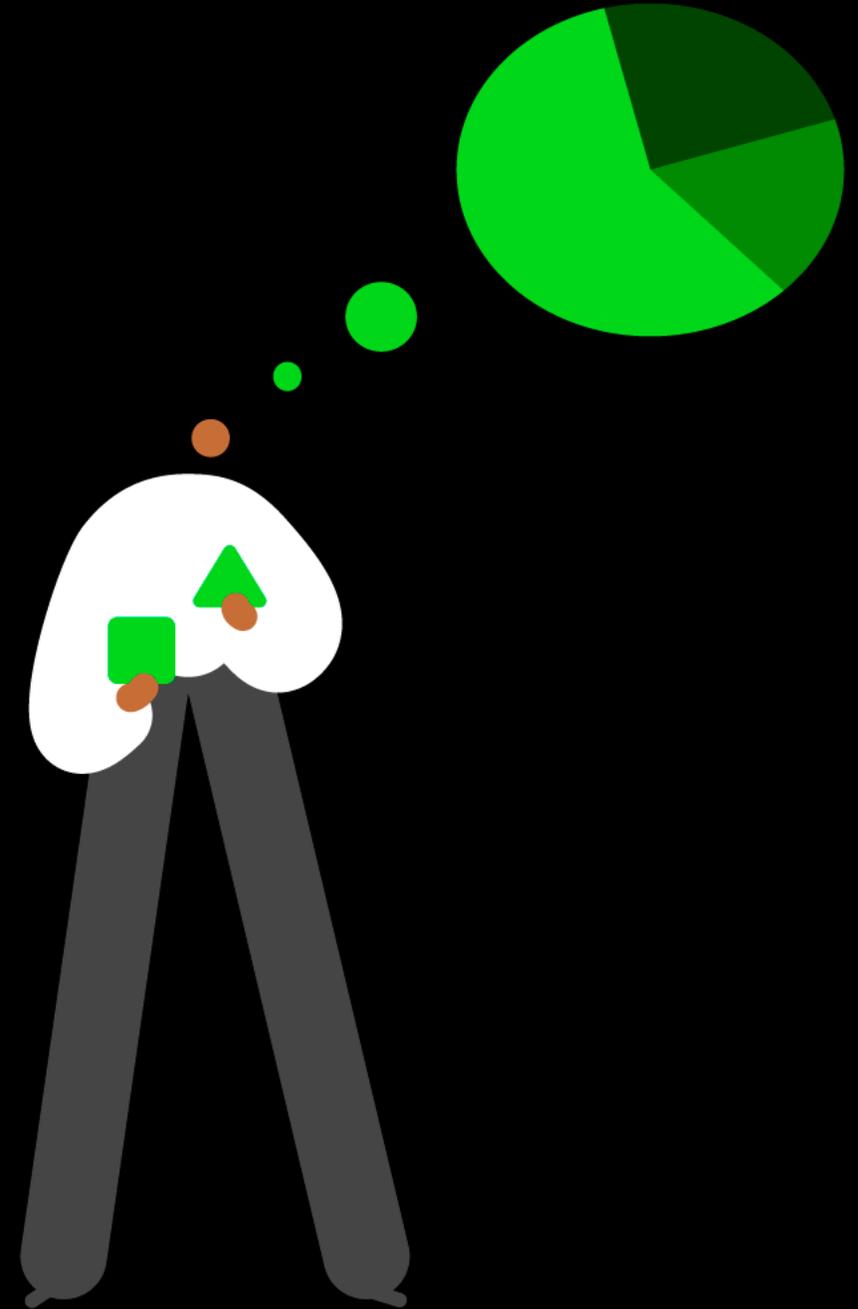
- Create and **manage POs in Sage X3 or SSCI** with real-time sync.
- Build **flexible PO workflows** for easy updates and approvals.
- **Collaborate with vendors** to edit, cancel, or complete POs.

Coming Soon (2026)

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

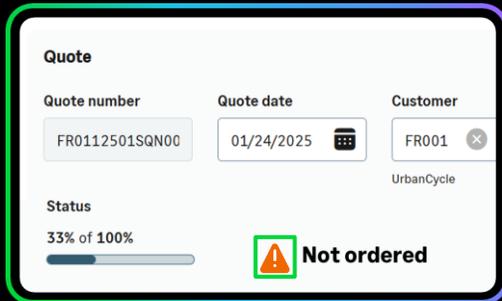


Elevating the user experience



Elevating your user experience

Continuous improvement driven by Ai and innovation

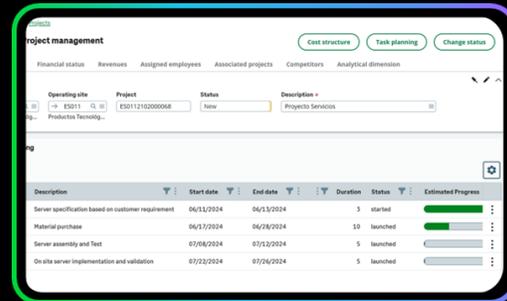


Simplification

Simplify information architecture and business flows

Simplify dashboards

Simplify workflow rules



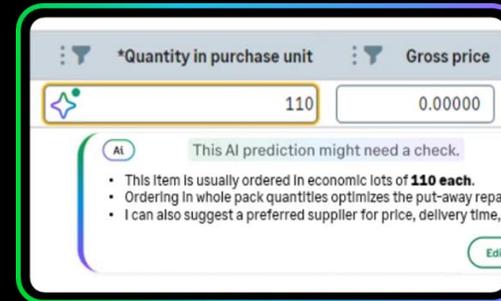
New components

Visual components in Sage X3 screens

New dashboards

New graphical workflow

New X3 Builder pages



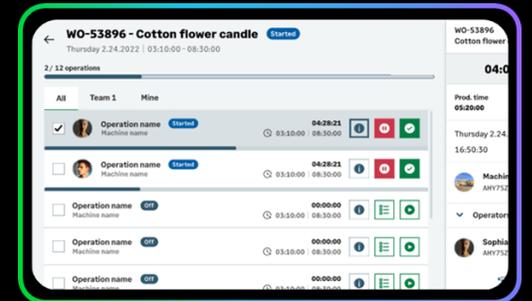
AI assisted

Copilot & Insights

AI-assisted workflow and dashboards

AI-assisted setup

AI-assisted coding



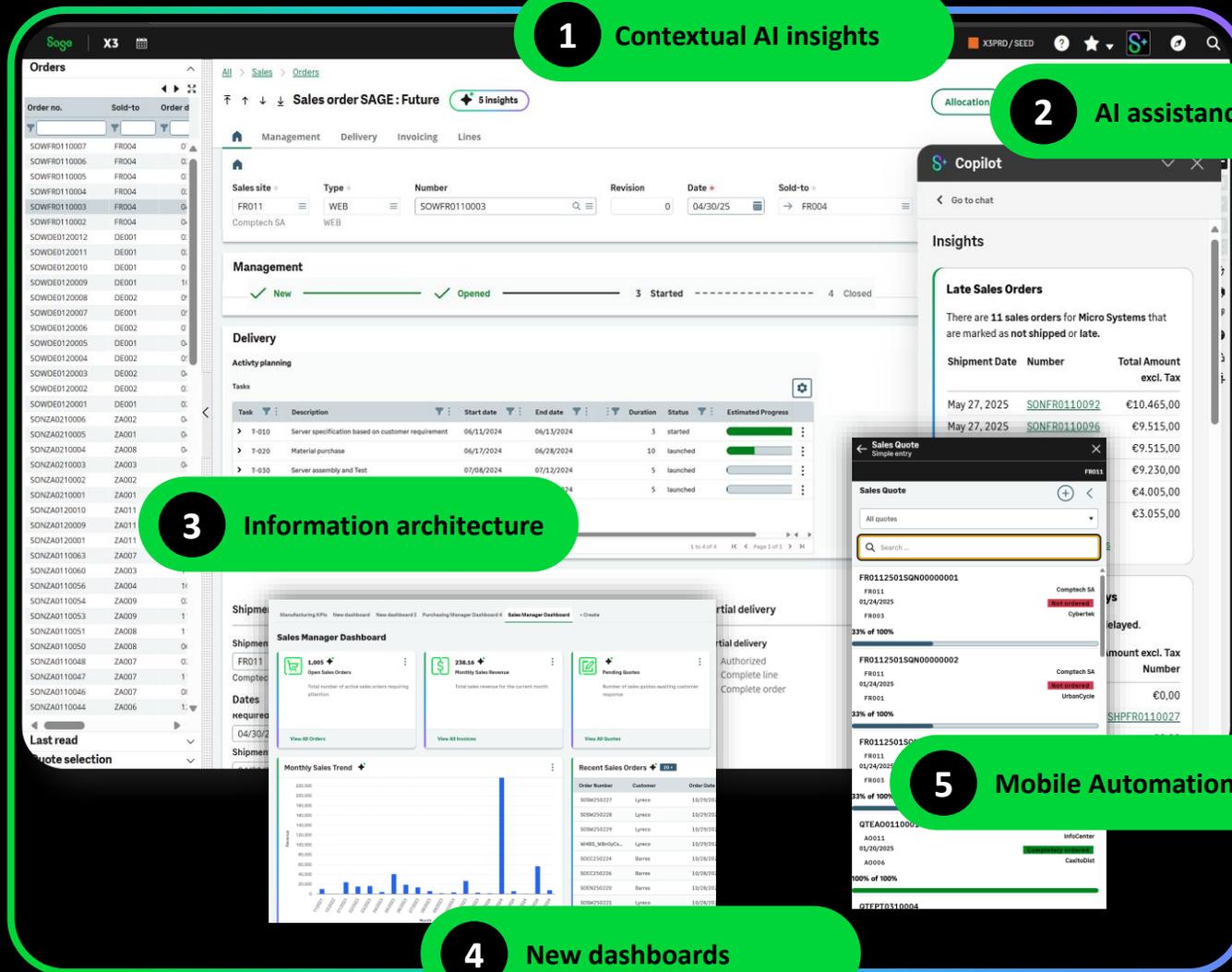
User interface

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

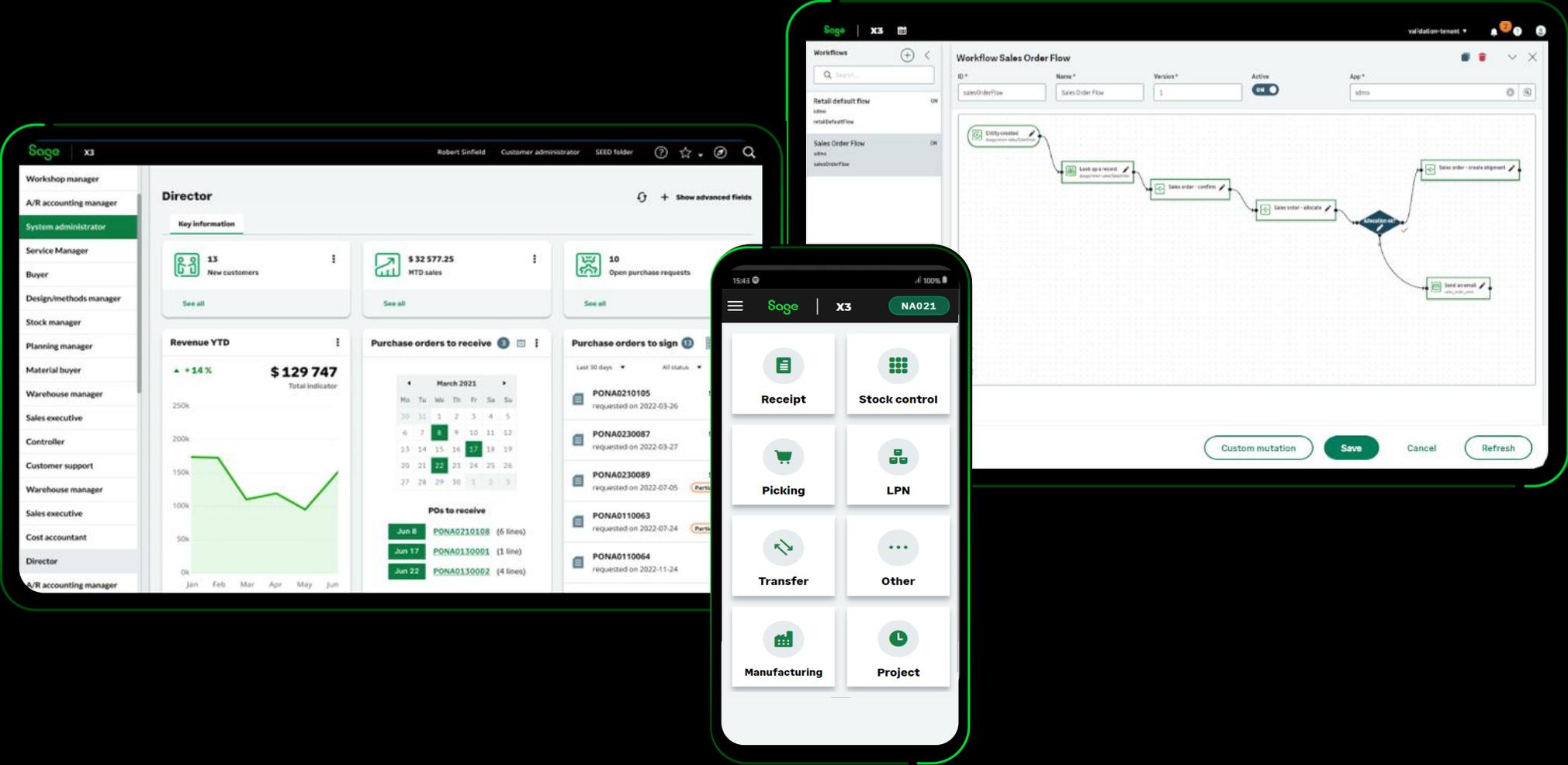
- New components in Sage X3 screens
- New UI pages
- New Dashboards
- Simplification: Dashboards
- Simplification: First business flows
- Simplification: User access rights

2027+

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

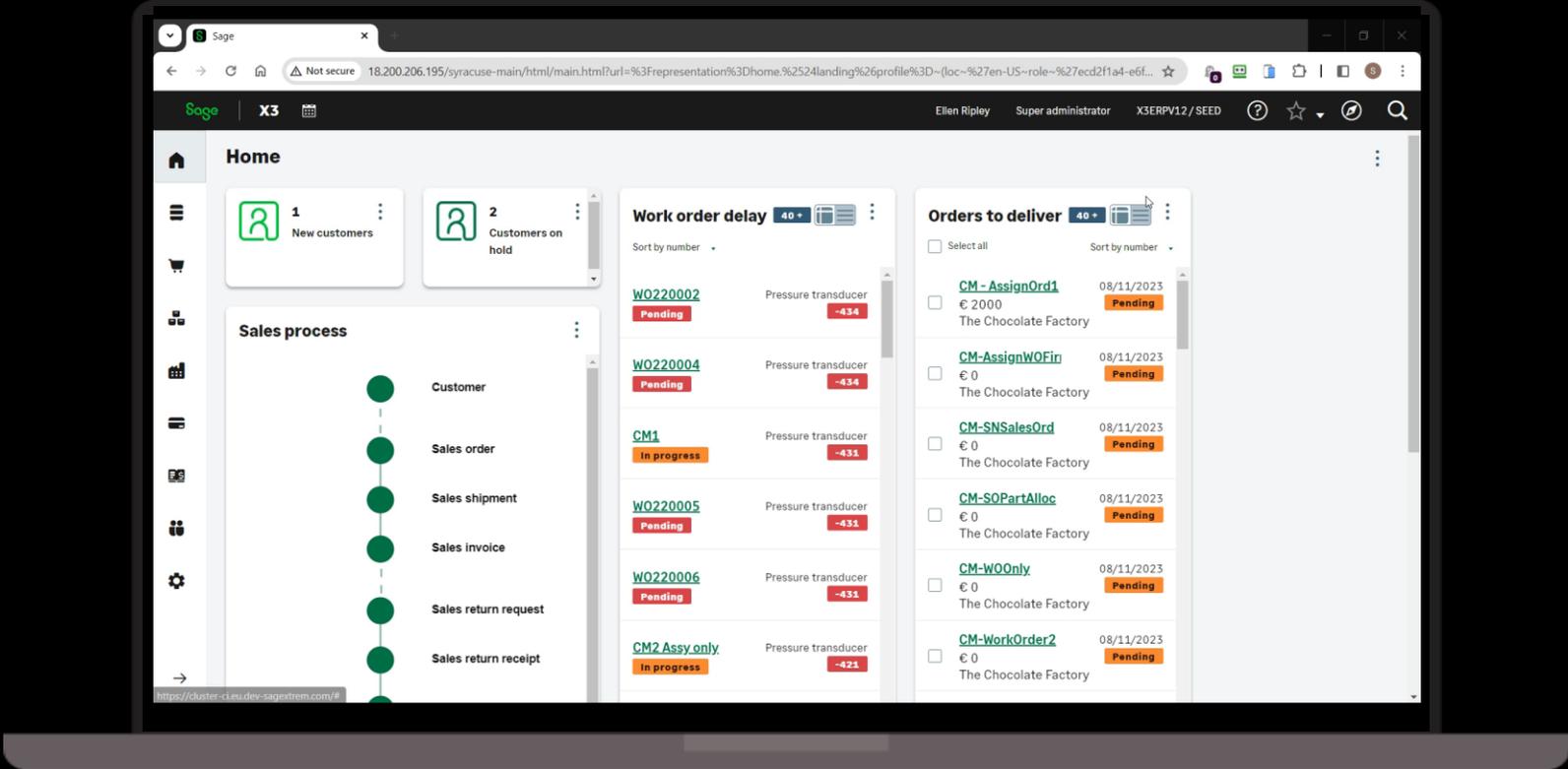
User experience

New components in the Sage X3 user interface



User experience

The new dashboards (2026 R1)



User experience

The new Workflow tool

The screenshot shows the Sage Workflow Designer interface for a workflow titled "Sales order created". The workflow starts with a "Starts when" trigger for "Sales order created", followed by a "Do" action "Confirm sales order". A "Condition" step checks "Total amount < 1,000\$". If true, it branches into two paths: one leading to "Send customer email" and "Sales order allocation", and another leading to "Send not to sales". If false, it leads to "Send not to sales". A modal window for "Send purchase order" is open, showing fields for "Template", "From", "To", "Subject", and "Body".

1 Automation and personalisation

2 Emails / Notifications

3 Customisable in-product alerts

The screenshot shows the Sage Workflow Designer interface for a workflow titled "Retail default flow". The workflow starts with an "Entity created" trigger for "SalesOrder", followed by a "Look up a record" action for "SalesOrder". This is followed by "Sales order - confirm", "Sales order - allocate", and a decision diamond "Allocation ok?". If yes, it leads to "Sales order - create shipment" and "Send an email". If no, it leads to "Send an email".

Thank you.

+44 (0)333 800 3606

enquiries@inixion.com

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