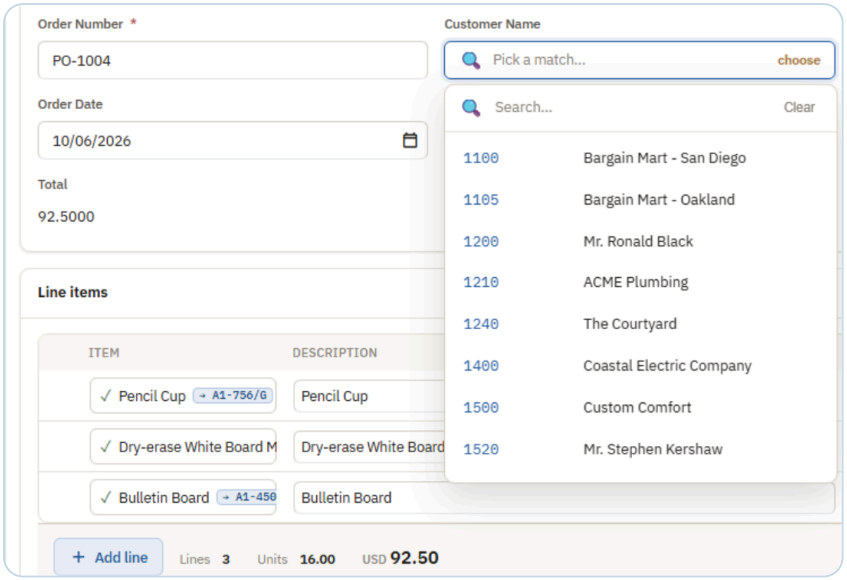
**ERPAdvance Asia** DEVELOPED BY beca FOR SAGE 300

DOCUMATE FOR SAGE 300

# Sales Order Automation

**Customer POs in.**
**Sage 300 sales orders out.**

Upload customer purchase orders as PDFs or images. Documate uses AI to capture order details, match customers and items to Sage 300, and create sales orders. Fully matched orders can post automatically, while exceptions are highlighted for review.




### Hands-free when it matches

A PO whose customer and every line match Sage 300 can post as a sales order automatically. Your team stays in control and spends its time on the orders that need attention.

**TRACK AND CONTROL**

- ✓ Status dashboard
- ✓ Bulk approve & post
- ✓ Optional manager approval
- ✓ Who-did-what trail for every order

## Automation at every step

From customer PO to Sage 300 sales order

**1 UPLOAD YOUR POS**

### One PO or a whole batch

Upload a single PO, or drop many PDFs or images at once.

**2 AI CAPTURE**

### AI reads every line

PO number, date, customer, tax and every line - item, quantity and price. The form opens pre-filled.

**3 AUTO-MATCHING**

### Matched to Sage 300

Customer and items matched to live Sage 300 data. Order defaults filled in.

**4 SMART CHECKS**

### Remembers and checks

Remembers each customer's own names and codes. Identical files set aside, similar POs flagged.

**5 REVIEW WHAT NEEDS ATTENTION**

### Fix only the exceptions

Each problem spelled out, fixed with a live Sage 300 lookup. Tax compared with the PO.

**6 CREATE SAGE 300 SALES ORDERS**

### Posts when matched

Fully matched orders can post on their own. The order number is written back.

## Less keying. Only the exceptions need you.

| BEFORE \| Manual order entry | AFTER \| With Documate |
|---|---|
| Key the header and every line into Sage 300 | AI reads the PO - the form arrives pre-filled |
| Match the customer's item names to your codes | Customer and items matched to Sage 300 codes |
| File the PO and dig for it when asked | Original PO and history kept in Documate |

beca **Developed by BeCa IT** - a recognised Sage 300 (Accpac) and Sage CRM partner since 2006.

## See it with your own customer POs

Contact your Sage 300 partner or ERPAdvance Asia for a demo.

**WhatsApp +65 8168 3926 | contact@erpadvanceasia.com | erpadvanceasia.com**