Bring Sage 300 Transactions Directly to WhatsApp

A more visible communication channel for documents already created in Sage 300.

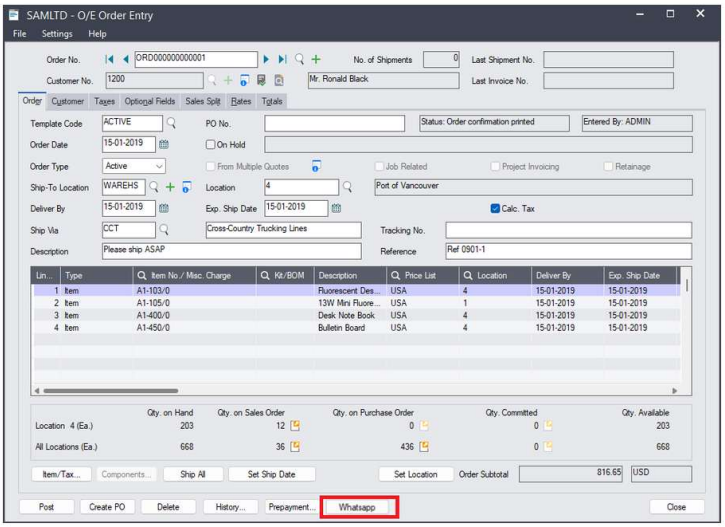
KEEP EMAIL WHEN YOU NEED IT • ADD WHATSAPP FOR FASTER VISIBILITY

Keep your existing process - add WhatsApp when needed

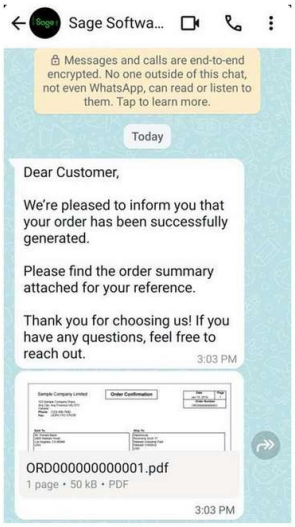
Continue posting transactions in Sage 300 as usual. Your existing email process can remain in place. Once a supported transaction is posted, users can also send a configurable WhatsApp message and the relevant PDF directly to the customer or vendor.

See it in action

1 Send from the posted Sage 300 transaction



2 Received in WhatsApp



The WhatsApp button appears on the posted Sage 300 transaction. The recipient receives the message and PDF in WhatsApp.

1	2	3	4
Transaction posted	WhatsApp button clicked	Template + PDF sent	Customer/vendor notified

What can be sent

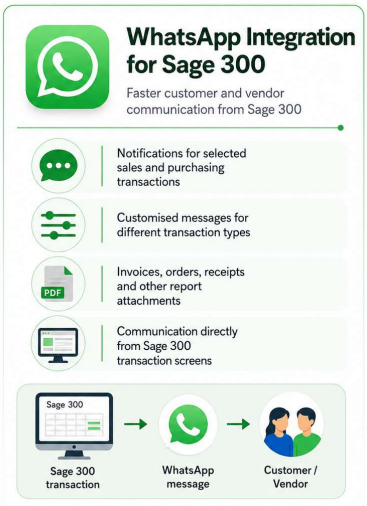
ACCOUNTS RECEIVABLE
- A/R invoices
- Receipts
- Customer statements

ORDER ENTRY
- Orders
- Shipments
- O/E invoices

PURCHASE ORDERS
- Purchase orders
- P/O receipts

Current standard scope covers selected Sage 300 A/R, O/E and P/O transactions. Additional screens or workflow requirements can be reviewed separately.

Designed for practical, day-to-day communication



Custom messages
Use different wording for invoices, orders, receipts and other transaction types.

PDF attachments
Send the relevant Sage 300 report together with the WhatsApp message.

Transaction assignment
Choose which supported Sage 300 screens should offer WhatsApp.

Bulk A/R statements
Send customer statements to multiple customers from the statement function.

Ready to see Sage 300 WhatsApp Integration in action?
Contact your Sage 300 partner for product information, pricing, a demonstration or a compatibility check.