AI-Powered AP & PO Invoice Automation for Sage 300 – implementation training



What the registration feedback tells us to present

This deck turns the registration findings into a learning path, not just a survey summary.

81%

Start from the basics

Most respondents are new to invoice automation, so explain the process before product screens.

55%

Show the sales opportunity

Over half of respondents with answers already have active or potential customer opportunities.

88%

Lead with “no more manual keying”

The strongest expected benefit is eliminating manual invoice data entry.

66%

Structured invoice data for AI analytics

AI needs clean, well-structured, accessible data before it can deliver value - finance data quality is the prerequisite, not an afterthought.

Presentation principle: simple explanation first → business value → live process → special scenarios → partner next steps.

Source: Registration report (28).csv.xlsx; feedback and registration-question analysis.

A webinar path for an audience new to AP automation

Keep the story educational and practical, then bridge into solution capability and follow-up.

1

Why automate AP?

Manual keying, email approvals and scattered documents slow down finance.

2

What is AP invoice automation?

Non-PO supplier invoices captured, validated, approved and posted to Sage 300.

3

What is PO invoice automation?

PO-backed invoices matched against purchase orders and receipts before posting.

4

Where AI adds value

OCR + machine learning extracts invoice data and creates structured data for validation.

5

Implementation training

Show standard flow, then address e-invoice, service PO and API questions.

Outcome for attendees Understand AP vs PO invoice automation, identify where Sage 300 customers benefit, and know the next step to qualify an opportunity.

CUSTOMER PROBLEM

Manual invoice processing creates hidden cost and risk

For many Sage 300 customers, supplier invoices still arrive in email, PDF, scanned images and paper.



Manual keying

AP staff retype vendor, date, amount, tax and lines into Sage 300.

Slow approvals

Email-driven approvals are hard to track and delay posting.

Duplicate risk

Manual handling increases duplicate invoice and payment risk.

Poor visibility

Invoices are hard to find before they are posted or paid.

The business case is not only “OCR”. It is faster processing, better controls, auditability, direct Sage 300 posting and AI-Ready Data.

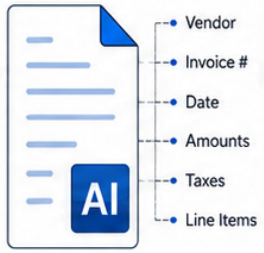
AI-Powered AP Invoice Automation

Capture, verify and process AP invoices with Sage 300 — no manual keying

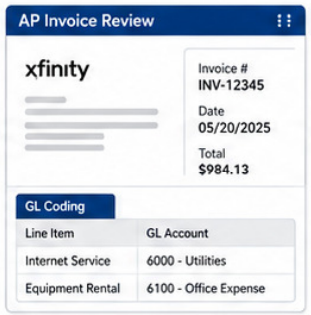
01 Multi-Channel Invoice Capture

- PDF
- Email
- Scanned Document

02 Automated Data Extraction



03 Invoice Verification & GL Coding



- ✓ Verify invoice details
- ✓ Map lines to GL accounts

04 Smart Validation Rules



- ✓ Duplicate check
- ✓ Missing field check
- ✓ Business rules

05 Automated Multi-Level Approvals



06 Sage 300 A/P Invoice Generation

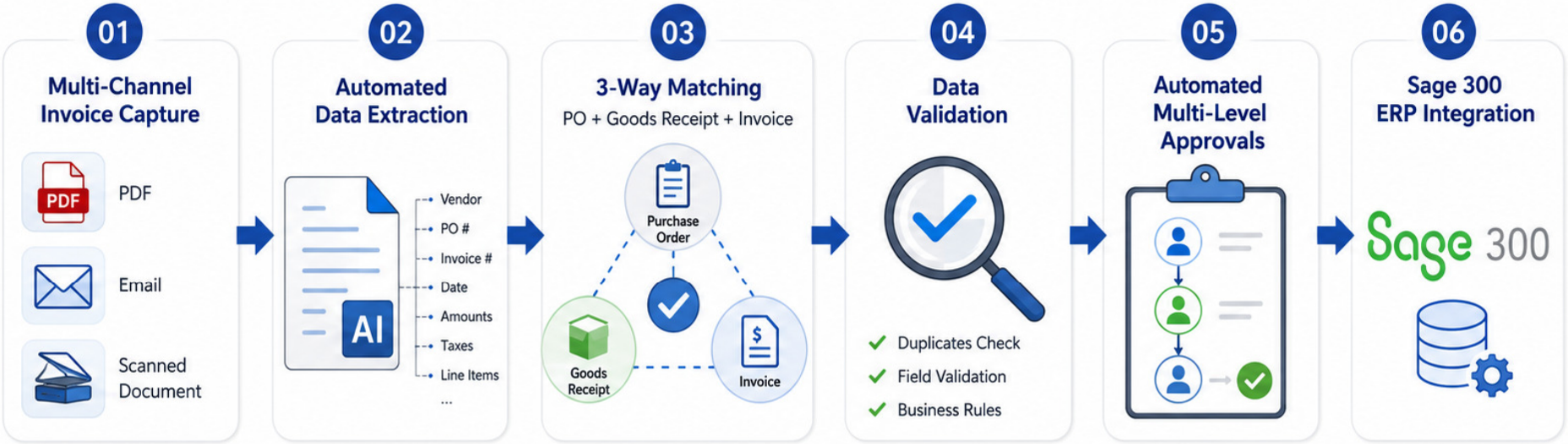


Convert incoming AP invoices into structured, validated data to improve accuracy, accelerate approvals, and support AI-ready finance operations.

norming

AI-Powered PO Invoice Automation

Capture, match and process PO invoices with Sage 300 — no manual keying



Automatically match PO invoices with purchase orders and receipts to improve accuracy, prevent over-invoicing, and speed up approval and posting.

POSITIONING

AP invoice vs PO invoice automation

Partners should clarify which process the customer needs before discussing scope or demo flow.

AP Invoice Automation

For non-PO invoices
- Rent, utilities, subscriptions
- Professional fees and service bills
- Finance-coded expenses

Main control point
- AP verification, GL coding and approval before Sage 300 A/P posting.

Non-PO / GL coded

PO Invoice Automation

For PO-based purchases
- Inventory and goods invoices
- PO-backed services
- Invoices requiring receipt confirmation

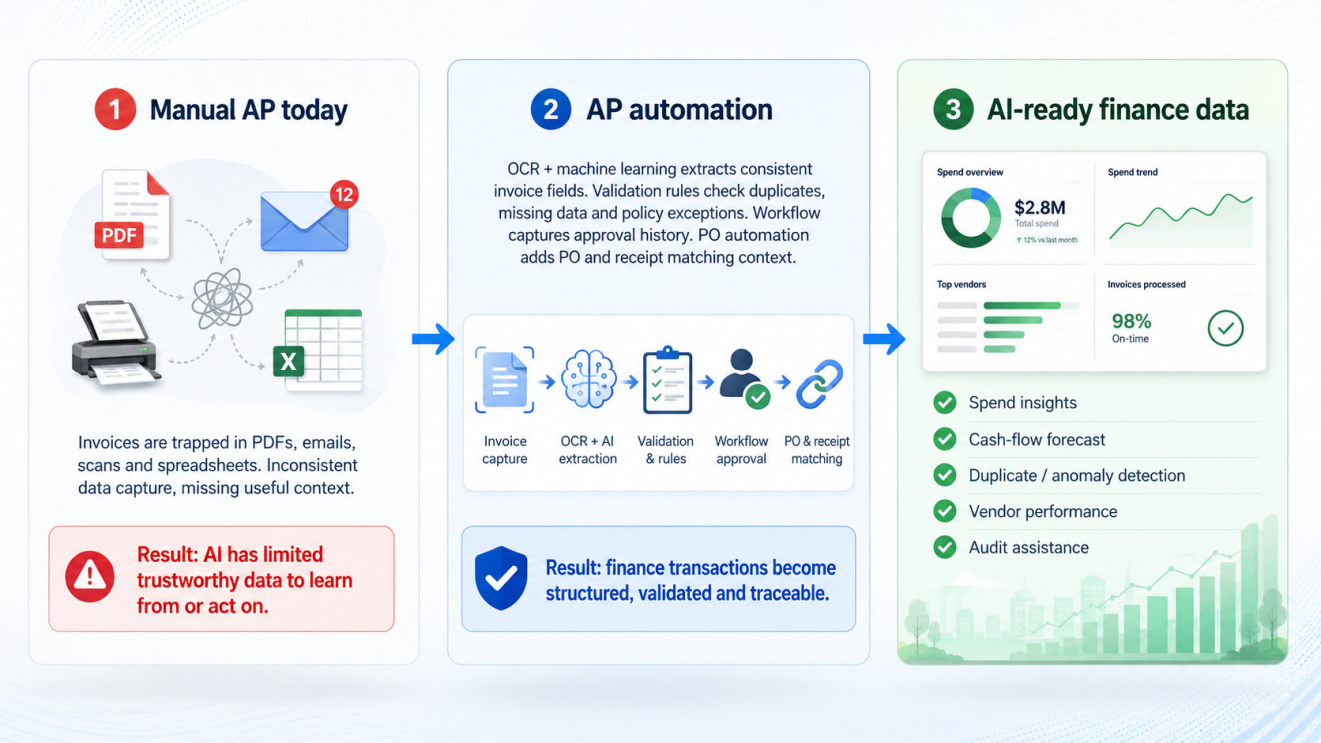
Main control point
- Match invoice ↔ PO ↔ goods receipt and identify mismatches before posting.

PO / 3-way match

STRATEGIC REFRAMING

The real value: make finance data ready for AI adoption

Manual data entry reduction is important - but the strategic reason to automate AP is to create trusted, structured finance data.



Sell AP automation as a data-readiness project for Finance AI - not just a data-entry productivity tool.
AI adoption depends on governed, high-quality data - and invoice automation is a practical way to build that foundation inside Sage 300.

MESSAGE PRIORITY

What customers expect from automation

Use these benefits to decide what to emphasize in the webinar and follow-up materials.



Suggested value message

“No more manual keying — invoices are captured, validated, approved and posted into Sage 300 with stronger controls.”

Then show PO 3-way matching as the differentiator for PO-based invoices.

ASIA PARTNER ENABLEMENT

Demo instance available for Asia partners

ERPAdvance asia

EAA is the distributor for Norming in Asia. Asia partners can request EAA's Azure demo instance to demonstrate Norming products to customers.

1 Asia partner



Identifies a customer interested in Norming AP, PO Invoice Automation or other RM modules.

2 EAA Azure demo instance



Hosted by EAA in Azure for partner-led or guided customer demos.

3 Customer demo



Show the workflow, qualify requirements and progress the opportunity.

Demo focus available: Norming Resource Manager modules, including **AI-powered AP Automation and PO Invoice Automation.**



To request demo access

Email contact@erpadvanceasia.com

Include your partner name, customer profile, demo focus and preferred schedule.

Recommended use: customer discovery call, partner enablement, or guided demo after interest is confirmed.