Norming Resource Manager

Enter and approve Sage 300 transactions from web or mobile

From manual processing to digital workflow, automation and AI-ready finance data

Webinar | 22 Sep 2026



Today's session

A practical story, then a connected live demo.

1. **What we heard**
   Registration feedback and common Sage 300 workflow pain points
2. **Why it matters**
   Finance is still carrying too much entry, chasing and checking work
3. **Resource Manager**
   How web and mobile workflow extends Sage 300 participation
4. **Live demo**
   One purchase from request to payment
5. **Where to start**
   Pick one process and move from manual to digital



What we heard from the webinar registrations

219 registrations. Mainly finance, IT, partners and Sage 300 users looking for practical automation.

219
Registered participants
0 cancellations

136
End-user registrants
business users

83
Partner registrants
channel audience

52%
End users from finance
71 of 136

67%
Finance + IT
91 of 136

AUDIENCE SIGNAL

This is a finance-led audience, with strong IT and partner participation.

Start with finance pain, then quickly prove web and mobile access, workflow control and Sage 300 integration.



The answers differ by who you are

Same webinar. Four different reasons for being here.

FINANCE — 71 of 136 end users

69% — **Manual data entry**

Their top process is supplier invoices, not purchase requests

IT — 20 end users

69% — **Approvals stall when managers are away**

Well above finance at 46% - IT fields the remote-access complaints

DIRECTORS — 13 end users

86% — **No visibility of approval status**

Directors do not type. They wait, and they cannot see

PARTNERS — 83 registrants

86% — **Put purchase requests first**

Against 58% of end users - the channel leads with PR

The pain is not one screen - it is a disconnected process

Manual entry, offline approvals, missing documents and matching delays all happen together.



THE CURRENT PATTERN

Email · Excel · Paper

Finance re-enters and chases

Sage 300 gets the result later

Target state: capture earlier, approve digitally, integrate with Sage 300.

The strongest interest is procure-to-pay

The top five process interests form one connected business cycle.



ONE PURCHASE STORY

Request

Quote

Order

Receive

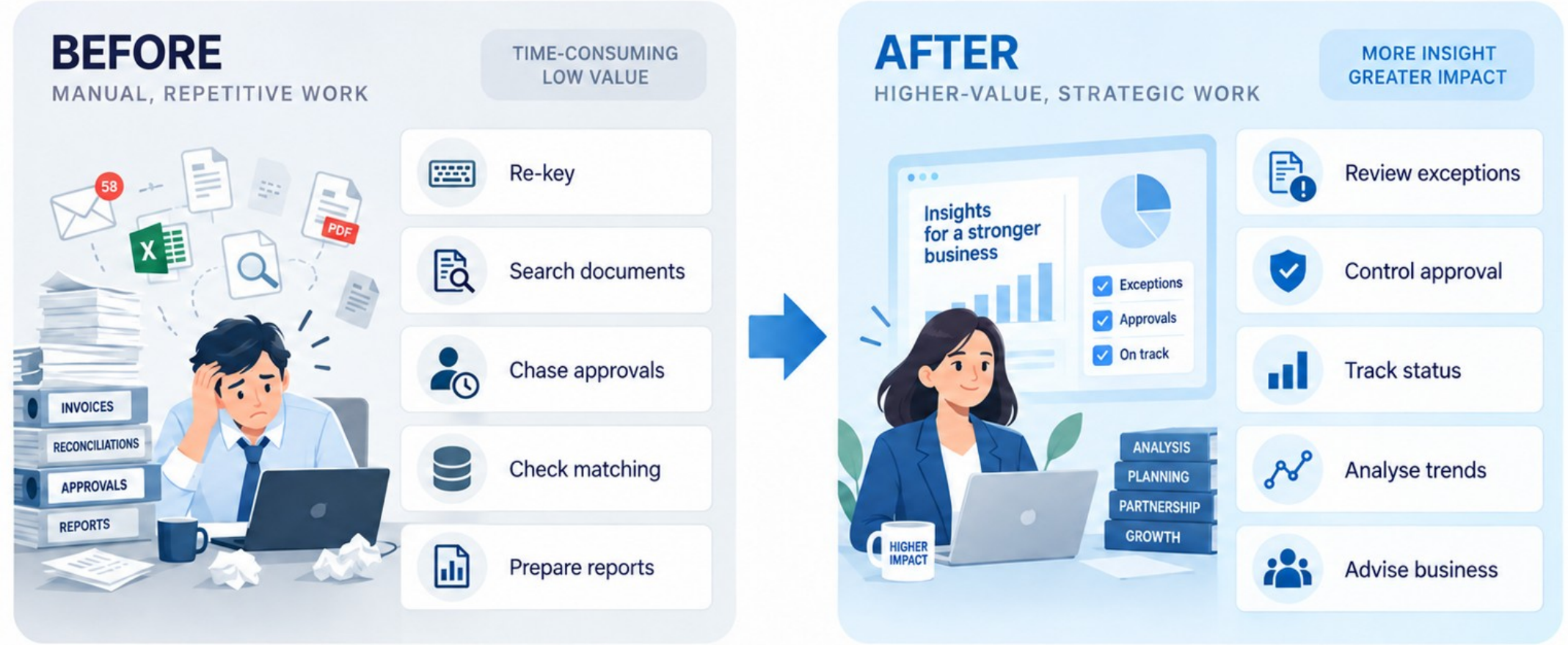
Invoice

Pay

This is why the live demo follows one purchase, from request through to payment.

The finance role should move up the value chain

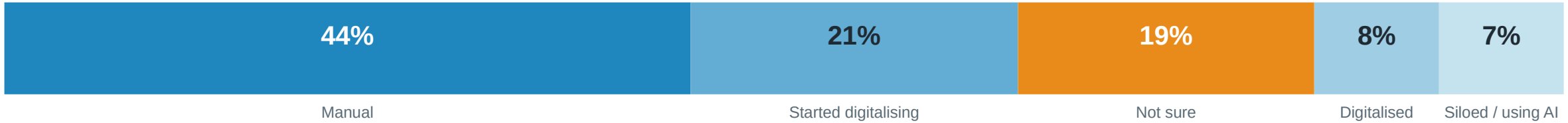
The goal is to remove low-value work from finance's role.



Automation is about removing the left-hand column.

AI-ready finance starts before AI

Most respondents are still at the manual or partial digitalisation stage.



84%

Manual, partly digital or unsure

114 of 135 respondents

CORE MESSAGE

You do not start by adding AI to a manual process.

First digitalise the transaction, the workflow, the documents and the approvals. Then automation and AI become practical.

Manual → **Digital** → **Connected** → **Automated** → **AI-enabled**

A normal day in your business

The business creates the transactions, management asks the questions - and today, all of it lands on the same desk.



Not everyone in the business needs, or has, a Sage 300 seat - so the information has to travel to someone who does.

Extend Sage 300 to More Users Across the Organization at an Affordable Cost

Add web and mobile access, workflow, document attachment and audit trail around your Sage 300 processes.



Norming Resource Manager helps more people participate in Sage 300 processes through web/mobile workflow, document attachment and audit trail.

Demo 1: Travel request and expense claim

Move the data entry to the person who already knows the answer.

Priya, sales — Monday · web, then the mobile app — **4 min**



Travel request on the web

Expense and receipt on the phone

Manager approves

Posted to Sage 300

WHAT YOU TOLD US

Expense and travel claims	52%
Documents hard to find	56%
Manual data entry into Sage 300	69%

Why should finance re-enter an employee's expense when the employee already knows what they spent?

Demo 1 recording: Travel request and expense claim

The demonstration shown during the webinar - watch it again any time.



A travel request raised in the browser, then the expense and receipt captured on a phone and approved on mobile - and the approved claim generated in Sage 300, through to the A/P invoice.

Watch on Vimeo ▶️

https://vimeo.com/1229399024

Want to see it on your own Sage 300? Talk to your Sage partner - ERPAdvance Asia supports them across Asia.

Live demo story: one purchase from request to payment

Each step proves one business point and links to the next.

Request → 3 quotes → Approval → PO → Receipt → Invoice + AI → Payment → **Visibility**



THE CAST

- **David** — Operations
- **Purchasing** — Sourcing
- **Sam** — Warehouse
- **Mei** — Accounts payable
- **Rachel** — Finance manager

One supplier runs through the demos: Chloride Systems. Watch where each document comes from - and who is holding it when finance finally needs it.

Demo 2: Web purchase request

Capture the requirement at source, before finance has to re-enter it.

David, operations manager — Tuesday morning · a new server is needed

WHAT YOU WILL SEE

The requester submits a structured purchase request

The requester enters what they need, adds supporting documents and submits the request through web or mobile workflow - instead of emailing finance or purchasing.

Need → Request → Attachment → **Submit**



67%	69%	40%
Top process interest	Manual entry pain	Status visibility pain

Less email and Excel. Less re-keying. Documents captured from the start.

Demo 2: Supplier quotations and comparison

Bring purchasing control into the same workflow.

Purchasing

Three days later · the quotes come back

WHAT YOU WILL SEE

Purchasing has a controlled sourcing record

The supplier decision, the quotations and the rationale are kept together before the PO is issued. Compare price, delivery, terms and attachments in one process.

Supplier A → **Supplier B** → **Supplier C**



53%
Supplier quote interest

56%
Documents hard to find

38%
Budget control pain

Price may not be the only criterion - but the evidence survives either way.

Demo 2: Approval from anywhere

Make approval control visible, mobile and traceable.

Department head, then the CFO — Same afternoon · one of them is travelling

WHAT YOU WILL SEE

Approval routing and mobile approval

Approvers review the request, the quotations and the attached documents, then comment and approve or reject on the phone - wherever they are.

Requester → Approver 1 → Approver 2 → **CFO / final**

MOBILE FOCUS

- Review
- Approve or reject
- Comment
- Track status

52%
Approval delay pain

66%
Email, Excel or paper approvals

40%
Status visibility pain

The approval trail should not be sitting in personal inboxes.

Demo 2 recording: Purchase request, quotations and approval

The demonstration shown during the webinar - watch it again any time.

A purchase request with attachments and a live budget check, requests for quotation emailed to suppliers, quotes compared side by side, approval on mobile - and the PO created in Sage 300 and emailed to the vendor.

Watch on Vimeo ▶️

https://vimeo.com/1229399025

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Demo 3: Approved purchase to PO and receipt

Avoid re-entry, and capture receiving closer to operations.

Sam, warehouse — Eleven days later · the goods arrive at the dock

WHAT YOU WILL SEE

The approved purchase becomes the Sage 300 order

The approved purchasing process should not end with someone re-entering the same information into Sage 300. Receiving is captured on a browser or tablet, at the point the goods arrive.

Approved purchase → **Purchase order** → **Goods arrive** → **PO receipt** → **Sage 300 updated**



62%
Goods receipt interest

52%
Matching delay pain

69%
Manual entry pain

Re-keying is where goods receipt errors come from. Capture it at the source.

Demo 4: Supplier invoice, matching and AI capture

Once the process is digital, AI can do something useful with it.

Mei, accounts payable — The supplier invoice arrives

WHAT YOU WILL SEE

From keying to reviewing

Finance reviews exceptions and supporting documents instead of entering every supplier invoice field manually. AI helps capture and prepare - finance still controls the process.

Invoice PDF → **AI data capture** → **PO / receipt match** → **Exception review**



67%
Supplier invoice interest

69%
Manual entry pain

52%
Matching delay pain

AI helps capture and prepare. Finance still reviews the exceptions.

Demo 4 recording: Supplier invoice, matching and AI capture

The demonstration shown during the webinar - watch it again any time.

Supplier invoices emailed or uploaded and read by OCR, then matched against the PO and goods receipt in Sage 300, with over-invoicing flagged. Finance reviews only the exceptions before the invoice posts.

Watch on Vimeo ▶️

https://vimeo.com/1229399021

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Demo 5: AP payment requisition and approval

Complete the procure-to-pay story - request, buy, receive, invoice and pay.

Mei and Rachel — Payment run · thirty days on

WHAT YOU WILL SEE

Payment approval before payment processing

Outstanding supplier invoices can be selected for payment, routed for approval and tracked before the authorised payment process continues in Sage 300.



WHY IT MATTERS

Control belongs before the money moves, not after it.

The approver sees the invoice, the PO and the receipt together - so the payment decision is made on evidence, not on a request in an email.

61%
Payment approval interest

52%
Approval delay pain

38%
Budget control pain

Supplier payment approval is one of your top four requested processes. The story should not stop at the invoice.

Demo 6: Sales quotation and A/R invoice requisition

The same control, on the money coming in. Start at the quotation, or go straight to the sales order - both routes are supported.

Sales, then the A/R clerk — A customer asks for a quote · web or mobile portal — **4 min**



WHAT FINANCE GETS

Control before it goes out

- Credit limit checked on entry
- Discounts routed to the right approver
- Revision copies tracked

Evidence travels with it

- Word, Excel, PDF and images attached

And the customer sees it

- Approved quote sent as a PDF
- Won quote becomes the sales order

49%	40%	66%
Sales quotation / A/R interest	Status visibility pain	Offline approvals pain

Every other scene today is money going out. This one is money coming in.

Demos 7-9: Manager console, multi-entity and reports

Finance manages attention, exceptions and approvals rather than re-entry.

Rachel, finance manager — Friday · what is waiting on her — **4 min**

One screen. Every company. No logging in four times.

Company A | Company B | Company C | Company D

Manager view

What needs my attention

- Pending approvals
- Spend and exceptions
- Request status
- Approve in place, or on mobile

Multi-entity approval

One view, several companies

- Approve across companies
- No separate log-ins
- Consistent rules
- Regional CFO view

Reports on the web

Sage 300 reporting on the web

- Crystal reports through a browser
- No desktop seat needed
- Shared with the business
- Current, not month-old

40% Status visibility pain

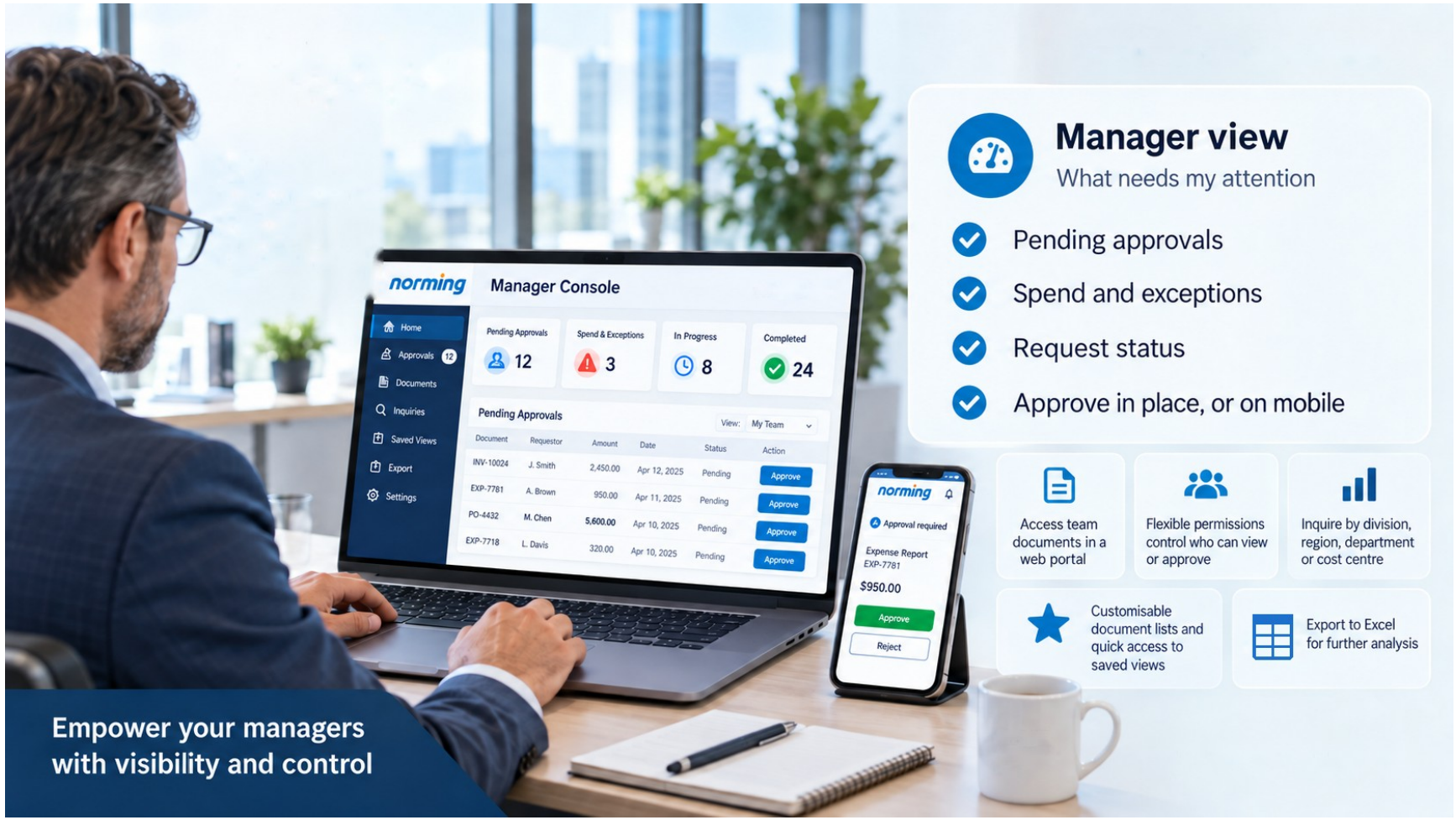
52% Approval delay pain

66% Offline approvals pain

Manage by exception - stop asking where things are.

Demo 7: Manager console

What needs my attention - pending approvals, spend and exceptions, and request status in one screen.



Demo 7 recording: Manager console

The demonstration shown during the webinar - watch it again any time.

Every requisition in one view - filter by supplier or due date, customise and save your columns, export to PDF or Excel, drill into the attachments and approve on the spot.

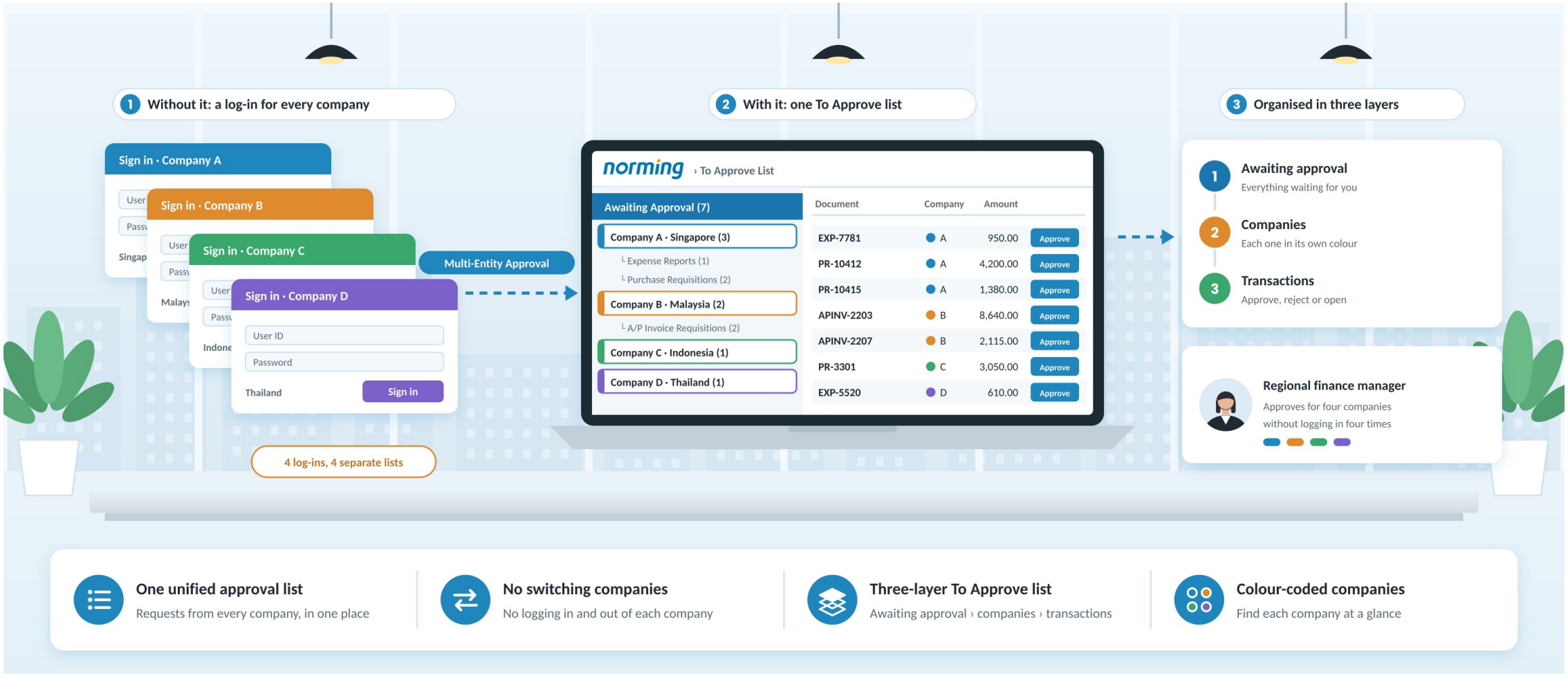
Watch on Vimeo ▶️

https://vimeo.com/1229398991

Want to see it on your own Sage 300? Talk to your Sage partner - ERPAdvance Asia supports them across Asia.

Demo 8: Multi-entity approval

One To Approve list for every company - no logging in and out of each one.



Demo 8 recording: Multi-entity approval

The demonstration shown during the webinar - watch it again any time.

One approval list covering several Sage 300 companies, grouped by transaction type - no logging out and back in for each company.

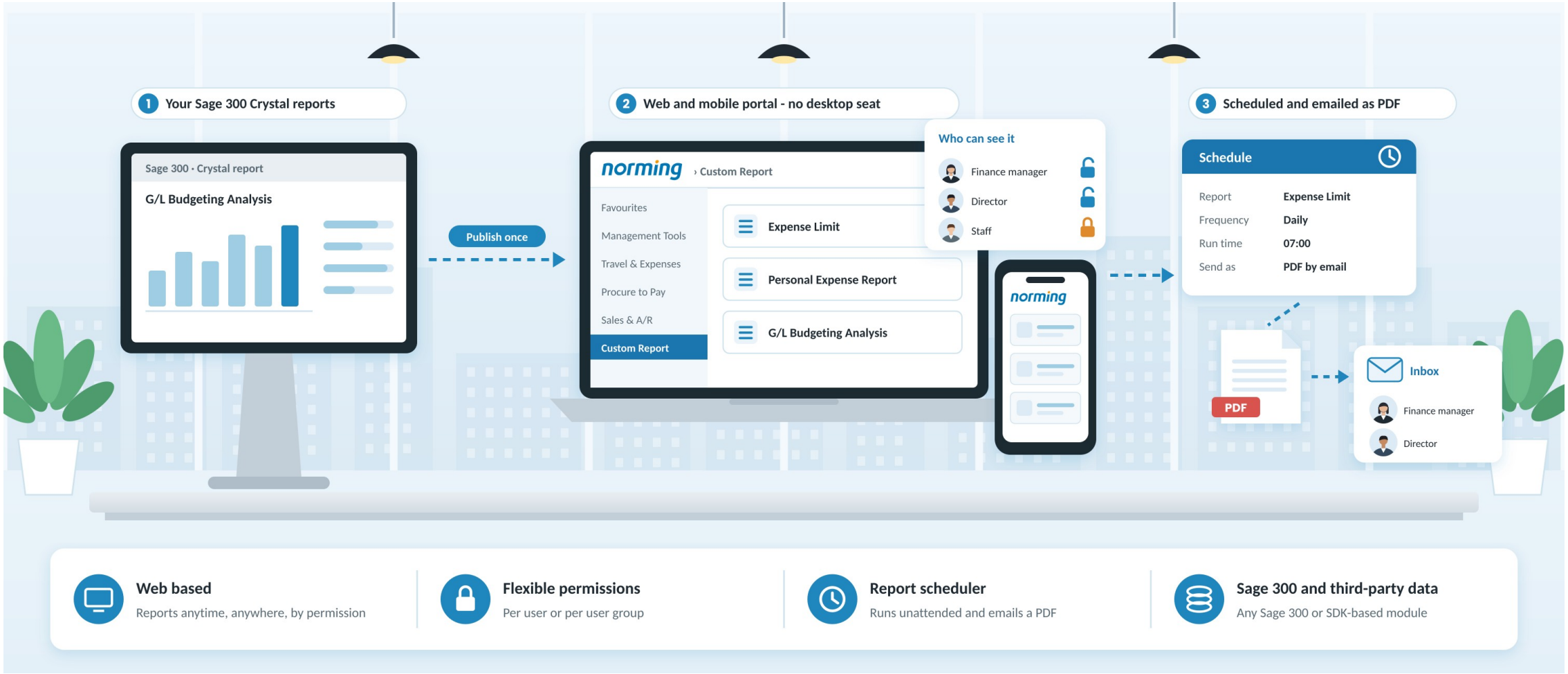
Watch on Vimeo ▶️

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Demo 9: Reports on the web

Publish any Sage 300 Crystal report once - to the right people, on web and mobile, or on a schedule as a PDF.



Demo 9 recording: Reports on the web

The demonstration shown during the webinar - watch it again any time.

Publish any Sage 300 Crystal report to the web portal so users can run it without logging in to Sage 300, and schedule it to arrive by email as a PDF.

Watch on Vimeo ▶️

https://vimeo.com/1229398992

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Demo 10: Document management and the audit trail

Sage 300 has no built-in way to attach documents to a transaction. This is how that gap is closed.

Rachel, finance manager — Year end · the auditor's questions · Sage 300 desktop — **3 min**

Sage 300 cannot attach a document to a transaction ► **Norming Document Management attaches, stores and retrieves it - on the transaction itself**

Attach to any screen

Transactions and master records

- A/R, A/P, O/E, P/O
- I/C, G/L, P/JC
- Vendor and customer records
- Item and project records

Where the auditor looks

Opened on the Sage 300 desktop

- A/P payment entry
- A/P invoice entry
- G/L journal entry
- Vendor records and contracts

The audit answer

In seconds, not in an inbox search

- Who approved it
- When they approved it
- Why this supplier was chosen
- What was actually paid

56% Documents hard to find

40% Status visibility pain

52% Matching delay pain

Go paperless and stay audit-ready - one source of truth.

Demo 10 recording: Document management and the audit trail

The demonstration shown during the webinar - watch it again any time.

Supporting documents kept with the transaction - shown on an A/P payment and a G/L journal, with drill-down to the source documents. Available on its own, even without Resource Manager.

Watch on Vimeo ▶️

https://vimeo.com/1229398990

Want to see it on your own Sage 300? Talk to your Sage partner - ERPAdvance Asia supports them across Asia.

Familiar steps, flexible workflows

Your users always follow the same simple steps. Behind them, every process gets its own workflow, built around your rules.

WHAT YOUR USERS SEE - THE SAME FIVE STEPS, EVERY TIME



WHAT HAPPENS BEHIND SUBMIT - CONFIGURED FOR EACH PROCESS

Multi-level approvals | Amount thresholds | Cost-centre routing | Condition-based rules



Start with procure-to-pay because demand is strongest - then add the next process with its own workflow, on the same platform.

Every area here is recorded on the Resource Manager product page. Tell us in the chat which one you came for, and your partner will follow up with the right recording.

What to take away from today

Capture earlier. Control sooner. Get more from Sage 300.



The problem isn't Sage 300 - it's what happens before the data reaches it

69% of you named manual data entry into Sage 300 as a top challenge

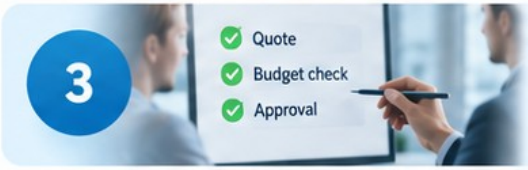
Your registrations



Capture it at source

The person who knows the transaction enters it - on the web or a phone, without a Sage 300 seat

Demos 1 - 2



Put control before commitment

Quotes, budget checks and approvals happen before the PO is raised or the payment leaves

Demos 2 - 3, 5



Digital first, then AI

The AI matched the invoice only because the PO and the receipt were already captured

Demo 4



The evidence stays with the transaction

Managers see everything across companies; auditors find it in Sage 300

Demos 1 - 6, 10

Modernising finance does not mean replacing Sage 300. Start with one high-volume process.

Where should a Sage 300 customer start?

Start small, prove value, then expand - on the Sage 300 you already have.

PILOT APPROACH

Choose one process with clear pain

The best starting point is usually a process with high volume, manual entry, approvals, supporting documents and multiple people involved.

Do not implement every module at once.

GOOD STARTING PROCESSES

- Purchase request
- Supplier invoice
- Payment approval
- Expense claim

1. Map requesters
2. Map approvers
3. Map documents
4. Map Sage 300 result
5. Pilot workflow

NO SAGE 300 UPGRADE NEEDED

Start now - on the Sage 300 you run today

Norming Resource Manager is fully integrated with Sage 300, from V6.0 to V2026.

Sage 300 V6.0 to V2026

Start on the version you have

Fully integrated

Approved work posts straight into Sage 300

Talk to your Sage partner - backed by ERPAdvance Asia and Norming.

Also available from ERPAdvance Asia

Twelve solution areas from four software developers - each one installs alongside Sage 300 and posts back into the modules you already use

Workflow & approvals

Requisitions, RFQs, receipts, journals and quotes - approved on web or phone

Norming · TaiRox TODAY

AI invoice automation

Supplier invoices read and matched to the PO and goods receipt

Norming TODAY

Employee self service

Expenses, travel, cash advances, timesheets, leave and attendance

Norming TODAY

Reporting & documents

Manager console, Crystal reports on the web, documents on the transaction

Norming TODAY

Project & job costing

Estimates, contracts, site labour, equipment and resource planning

Norming

Fixed asset management

Acquisition to disposal, leasing, maintenance and barcode tracking

Norming Fixed Assets

AR Collections

Overdue chasing, disputes, promised payments and sales pipelines

TaiRox

Security, access & compliance

Single sign-on, multi-factor, permission and segregation-of-duties checks

BeCa IT · TaiRox

Productivity & automation

Bulk updates, a smarter finder, cross-company maintenance

TaiRox

Data & system administration

Faster integrity checks, history clearing and company copying

TaiRox

Document numbering

Numbers that carry your branch, location or fiscal-year structure

Greytrix

Customer communication

Invoices, orders and statements sent to customers over WhatsApp

Greytrix

Norming · TaiRox · Greytrix · BeCa IT

Available now for Sage 300. Further ERP platforms in progress.

We sell through partners - everything here is implemented and supported by the Sage partner you already work with.

Watch it all again

The full webinar recording and every demonstration shown during the session.

Full webinar recording https://vimeo.com/1229429107

1	Travel request and expense claim	https://vimeo.com/1229399024
2	Purchase request, quotations and approval	https://vimeo.com/1229399025
3	Supplier invoice, matching and AI capture	https://vimeo.com/1229399021
4	Manager console	https://vimeo.com/1229398991
5	Multi-entity approval	https://vimeo.com/1229398989
6	Reports on the web	https://vimeo.com/1229398992
7	Document management and the audit trail	https://vimeo.com/1229398990

Questions on any of these? Talk to your Sage partner - or contact us at contact@erpadvanceasia.com.

Modernising finance does not mean replacing Sage 300.

It means modernising how people capture, approve, automate and manage the work around Sage 300.

People → Resource Manager → Sage 300 → Automation & AI → **Finance insight**

Next step: identify one high-volume process and map requester → approver → document → Sage 300 result.

Your Sage partner is your first contact - backed by ERPAdvance Asia and Norming

WhatsApp +65 8168 3926 · contact@erpadvanceasia.com · erpadvanceasia.com