



Sage Expense Management



Sage
300 CRE

Export expenses to Sage 300 CRE

Taxi

\$250.00

Merchant: Uber

Project: Mercury

PAYMENT PROCESSING

Report Name
#1 - February Report

Expense ID
E/2025/04/T/1

Employee Name
Kelly Fisher

Spend date
Feb 28, 2025

Created date
Apr 12, 2025

Tax Group
-

Payment Mode
Personal Card/Cash

Project
Mercury

Class
Overhead

Category
Taxi

Merchant
Uber

Purpose
Client meeting

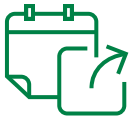
Category Code
-

[illegible]



Control when expenses are exported

Expenses can be pushed to Sage 300 CRE in different stages, depending on whether you reimburse employees using Sage Expense Management’s ACH or your own system. If you use your own system, the expense will automatically be marked as “paid” in Sage Expense Management.



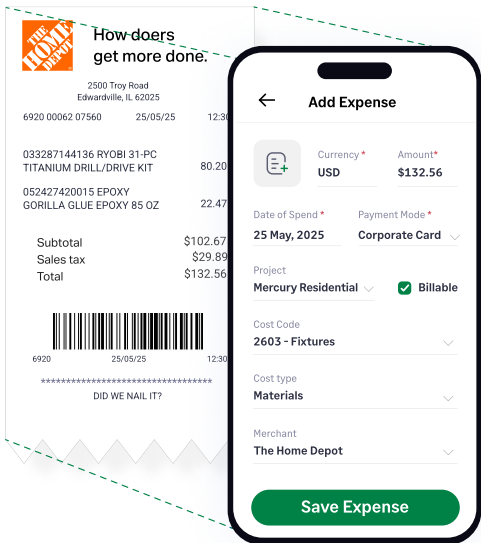
Put the process on auto-pilot with scheduled exports

If you want to automate the export between Sage 300 CRE and Sage Expense Management, then enable scheduled exports and set a preferred frequency. Sage Expense Management will take it from there.

Import data from Sage 300 CRE

When you already have all your data in your accounting system, there’s no need to re-enter it in Sage Expense Management. Choose how you want different dimensions to be mapped from your Sage 300 CRE account to Sage Expense Management, and we’ll ensure data is kept up-to-date.

Fields in Sage 300 CRE	Fields in Sage Exp Mgmt
Expense Accounts	Category
Vendors	Merchants
Jobs	Projects
Cost Codes	Cost Codes or Custom Field
Cost Categories	Cost Categories or Custom Field
Commitment	Auto-populated based on Job+Cost+Category+ Selection



Accurate expense coding

For your employees, the data you import, for instance, Projects, Categories, Cost Codes and more, will be available as a drop-down in the expense form, so everything is mapped accurately and automatically coded.

Get granular & customize your integration

- **You can modify the memo description:** Configure the data from Sage Expense Management that need to be exported to the memo/description field in Sage 300 CRE.
- **Skip export of specific expenses:** You can use a conditional rule to skip the export of specific expenses from Sage Expense Management to Sage 300 CRE.

Get a demo of the platform today

Get a demo

