



Remote Action Service



Sage Tech Partner

“Progress an Extender Workflow without needing to be logged in to Sage 300”

I CAN EASILY ACTION MY WORKFLOW TASKS WHEN I'M NOT AT MY DESK.



How it works

When designing an Extender Workflow Template, you can include one or more Remote Actions that make use of highly configurable emails and web forms.

What is it?

Remote Action Service builds on the Workflow capability provided by Orchid Extender. It lets you securely and easily receive and action workflow tasks using just email and a browser. No software to install, and no need to log in to Sage 300.

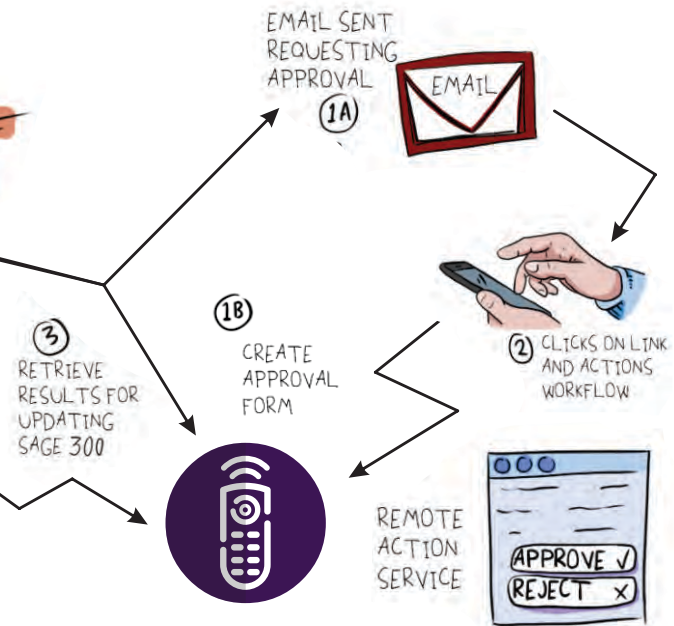


SAGE 300 + EXTENDER



When a Remote Action for an approval workflow is invoked:

- (1A) - An email is sent to the nominated approver(s)
- (1B) - The email includes a link to an online form, created on the cloud-based Remote Action Service platform. The form and link are unique for each user and action.
- (2) - The email recipient clicks on the link and fills in the form to remotely complete the action. (E.g. Approve or Reject, enter a comment, enter a value.)



- (3) - Extender retrieves the details of the completed Remote Action form and feeds the result back into Sage 300 to progress the Workflow



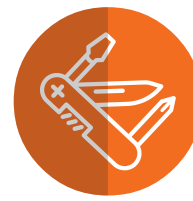
To streamline synchronization between Sage 300 and the Remote Access Service website, configure Orchid Process Scheduler to regularly poll for newly completed forms.

Minimum Requirements

Remote Action Service users do not need to be logged in to Sage 300, but the service works in conjunction with the Workflow capability provided by Orchid Extender (all editions), which in turn requires Sage 300 to be installed. Features relate to the latest supported version. Each Remote Action Service user requires a named Workflow User licence. A subscription to the Remote Action Service is also required. Remote Action Service is a Poplar Development Solution, built for Orchid Systems on the Django Web Framework and hosted on AWS.

More information

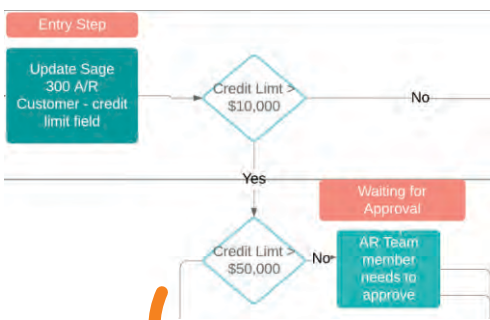
Further information about Remote Action Service, including videos, is available from Orchid's Website: www.orchid.systems/products/extender/remote-action.



“Streamline approvals and other business processes in Sage 300 to improve compliance, accountability, and transparency”

How does it work?

1. Start by designing a workflow using your preferred process charting tool.
2. Create a Workflow Template, comprising a set of steps, and attach it to a Sage 300 view.
3. Configure the workflow to be automatically triggered or started manually.
4. Define the value-dependent Workflow Actions (Python scripts) to execute at each step.
5. Use the Workflow Console (or screen icons) to monitor, examine and progress Workflow Instances.



Step Actions - Executed when a workflow enters this step

Lin...	Action #	Action Name	Field
1	10	SetDrillDown	{CUSTOMER}
2	20	SetDescription	{NAMECUST} + {IDGRP}
3	30	SetValue	{ARUSERLMT}
4	40	SetValue	{ARMGRMLT}
5	50	#WorkflowExists	
6	60	Evaluate	{AMTCRLMT}
7	70	Evaluate	{AMTCRLMT}
8	80	AssignUser	{ARUSERAPPROV}

ORCEWF - Extender Workflow Templates

Template ID: Customer Credit Limit

Description: AR Credit limit approval - when approved, WT sets new cre

Active: Active Auto Delete instance when complete?

Can start manually? No Can start multiple instances?

Lin	Step Name	Description	Entry Step
1	Check	Check new limit	Yes
2	Wait	Waiting for approval	No
3	Approve	Approve new credit limit	No
4	Reject	Reject new credit limit	No
5	Reassign	Reassign	No
6	ErrorManagement	Errorhandling in workflow	No
7	WaitError		No

- Design your business process
- Configure your Workflow Steps
- Assign Workflow Actions to each Step
- Monitor & manage with the Workflow Console

ORCEWF - Extender Workflow Console

View: All Assigned to me or a group I'm in Assigned only to me Unassigned

Template ID	Started On	Started At	Started By	Assigned To	View ID	Record Key	Desc
GL Activate Account	1/12/2020	15:17:35	SUSAN	ACCOUNTS	BL0001	10071	GL
AP Invoice Batch Post	1/12/2020	15:18:24	SUSAN	ACCOUNTS	AP0020	86	86 0-
AP Invoice Batch Post	1/12/2020	15:21:30	SUSAN	ACCOUNTS	AP0020	79	79 0-
AP Vendor Approval	1/12/2020	15:23:33	SUSAN	ACCOUNTS	AF0015	1201	Dist
AP Vendor Approval	1/12/2020	15:23:00	SUSAN	ACCOUNTS	AF0015	1204	Dist
PO APPROVALS-PO/Requisition	1/12/2020	15:25:44	SUSAN	ANNE	PO0766	RQW00000012	Regu
PO APPROVALS-Purchase Order	1/12/2020	15:28:57	SUSAN	ANNE	PO0520	PO0000000057	PO O
Sales Order Approval	1/12/2020	15:30:55	SUSAN	SALESMGR	OS0520	DRD000000000114	DE O
Create EFT File Approval	1/12/2020	15:32:30	SUSAN	ACCOUNTS	AP0030	PV.62	Deal
Create EFT File Approval	1/12/2020	15:32:38	SUSAN	ACCOUNTS	AP0030	PV.1	Deal
Sales Order Approval	1/12/2020	15:35:23	SUSAN	SALESMGR	OS0520	DRD000000000115	DE O
EFT Vendor Change	1/12/2020	15:37:11	SUSAN	ACCOUNTS	EL0006		SUS
Create EFT File Approval	1/12/2020	15:37:31	SUSAN	ACCOUNTS	AP0030	PV.2	Deal
Customer Credit Limit	1/12/2020	15:39:38	SUSAN	ARAPPROVER	AR0024	1200	M: R
Customer Credit Limit	1/12/2020	15:39:51	SUSAN	ARAPPROVER	AR0024	1210	ACM
Customer Off Hold Approval	1/12/2020	15:40:12	SUSAN	ARAPPROVER	AR0024	1100	Barg
DATA Approval	2/12/2020	18:01:12	ANNE	ANNE	RA0001	REP00000000000001	REP

Press CTRL-F in any column to filter

Refresh Drill Down History Values Reassign Delete Approve Reject

More information

Further information about Extender Workflow, including videos, is available from Orchid's Website: www.orchid.systems/solutions/workflow.



Minimum Requirements

Extender Workflow is included with Orchid Extender (Configurator or Developer). Extender requires Sage 300 System Manager, and operates with 3rd Party modules written in the Sage 300 SDK. Python is installed as part of Extender. Workflow User licences are required to access Extender Workflow functionality. Features relate to the latest supported version.

Contact your Sage Software Solution Provider

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