



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



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.



- 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.)

| 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.

- (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.

More information

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

Work Smaller with Orchid

Extender Workflow

"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.

What do you need?

Extender Configurator includes both the workflow tools and a set of pre-defined Workflow Actions. These can be used to configure workflows for common business processes (e.g. approvals and notifications) with no coding required.

You can build on this by using other Orchid products:

- Extender Developer lets you introduce Custom Actions constrained only by your imagination and Python coding skills.
- Remote Action Service lets you progress a Workflow action from any internet-connected device, without needing to log in to Sage 300. All you need is access to email and a browser.
- Workflow Anywhere provides a made-for-mobile App version of the Workflow Console, allowing you to both monitor and progress your Workflow Actions, in Sage 300, from your mobile device.

Step Actions - Executed when a workflow enters this step



More information

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



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Minimum Requirements

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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.

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