



Workflow Anywhere



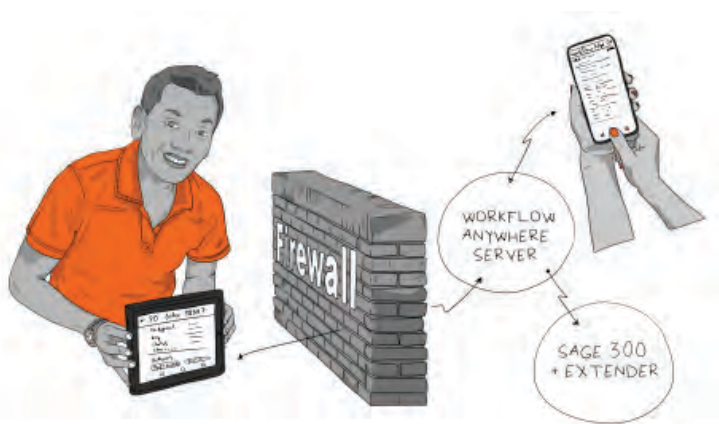
“An Extender Workflow Console for your mobile device”

Using the App

Install from your device's App Store (Google Play, Apple Store, Microsoft Store).



- Open the App, log in to Sage 300 using your saved credentials, select your Company
- View a list of all open Workflow tasks assigned to you (or a group you are in)
- Select a task to display more detail
- Action the task, as configured (e.g. Enter a value and/or comment, Approve or Reject)
- Your responses are reflected in Sage 300, in real time
- See a refreshed task list each time you return to the main display



Use it locally or remotely

- Connect directly to your local server if using the App in the office
- Alternatively, configure a secure firewall port for access from anywhere

Minimum Requirements

Each Workflow Anywhere user requires both a named Extender Workflow User licence and a named Workflow Anywhere App User licence.

Workflow Anywhere 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. The Workflow Anywhere App was developed for Orchid Systems by AutoSimply Ltd.

What is it?

Workflow Anywhere is a made-for-mobile version of Orchid's Extender Workflow Console. It provides a versatile alternative for monitoring and actioning your workflow tasks in Sage 300.



Made for mobile

Designed specifically for smartphones or tablets, Workflow Anywhere presents a streamlined, personalized, at-a-glance alternative to the classic version of the Extender Workflow Console.



More information

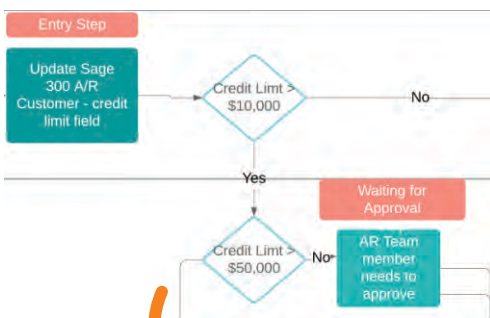
Further information about Workflow Anywhere, including videos, is available from Orchid's Website: www.orchid.systems/products/extender/workflow-anywhere.



“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

Lin...	Action #	Action Name	Field
1	10	SetDrillDown	{CUSTOMER}
2	20	SetDescription	{NAMECUST} + {IDGRP}
3	30	SetValue	{ARUSERLMT}
4	40	SetValue	{ARMGRRLMT}
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	Error handling in workflow	No
7	WaitError		No

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	Dist
AR Invoice Batch Post	1/12/2020	15:17:25	SUSAN	ACCOUNTS	EP0001	1077	DEB
AR Invoice Batch Post	1/12/2020	15:18:24	SUSAN	ACCOUNTS	AP0020	85	DEB
AR Invoice Batch Post	1/12/2020	15:21:00	SUSAN	ACCOUNTS	AP0020	79	DEB
AR Vendor Approval	1/12/2020	15:22:33	SUSAN	ACCOUNTS	AP0015	1201	CHG
AR Vendor Approval	1/12/2020	15:23:00	SUSAN	ACCOUNTS	AP0015	1204	CHG
PO APPROVALS PO Requisition	1/12/2020	15:25:44	SUSAN	ANNE	PO0760	FRN00000012	REQ
PO APPROVALS Purchase Order	1/12/2020	15:26:57	SUSAN	ANNE	PO0520	PO000000057	PO
Sales Order Approval	1/12/2020	15:30:55	SUSAN	SALESMGR	OE0520	ORD00000000114	DEB
Create EFT File Approval	1/12/2020	15:32:30	SUSAN	ACCOUNTS	AP0030	FR.1	DEB
Create EFT File Approval	1/12/2020	15:32:36	SUSAN	ACCOUNTS	AP0030	FR.1	DEB
Sales Order Approval	1/12/2020	15:35:23	SUSAN	SALESMGR	OE0520	ORD0000000001115	DEB
EFT Order Change	1/12/2020	15:37:11	SUSAN	ACCOUNTS	EL0009		SUS
Create EFT File Approval	1/12/2020	15:37:31	SUSAN	ACCOUNTS	AP0030	PY.2	DEB
Customer Credit Limit	1/12/2020	15:39:38	SUSAN	ARAPPROVER	AR0024	1200	MR
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
RNA Invoice	2/12/2020	18:01:15	ANNE	ANNE	RA0021	RFP0000000000001	DEB

Press CTRL-F in any column to filter

Refresh Drill Down History Values Reassign Delete Approve Reject

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

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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