



TeamWork for Sage 300



Sage Tech Partner



“Mobile, chat-based collaboration and management for Sage 300”

What is it?

TeamWork provides a new way for teams to work together, with conversations and actions shared across mobile devices and Sage 300 screens.

TeamWork integrates AutoSimply's AC Chat mobile app with Orchid's workflow and collaboration capability, supported by easy-to-use templates and configuration tools. It:

- Offers configurable notification and approval workflows for Sage 300 transactions, supported by a chat interface.
- Includes a made-for-mobile app version of Orchid's Extender Workflow Console, with the added chat functionality.
- Provides a versatile alternative for communicating about Sage 300 transactions and masterfiles, as well as monitoring and actioning your workflow tasks in Sage 300.



App-based Approval with associated Chat



- Provides visibility of chats between non-Sage users on Sage 300 screens.
- Can be combined with Orchid Document Management Link to link to relevant documents from Sage 300.

Why use it?

- Real-time communication: users can discuss Sage 300 transactions instantly, reducing delays in approvals or updates.
- Improved collaboration: teams across different departments can coordinate efficiently in a single chat platform, reducing the need for back-and-forth emails.
- Better tracking and documentation: conversations can be logged in a structured way, and referenced later, to track decisions related to Sage 300 transactions.
- Remote accessibility: Employees can access updates from anywhere, via mobile or desktop chat apps or in Sage 300 screens.


About the Mobile App

AutoSimply Chat (aka AC Chat) is available on your mobile device's app store. When used as part of TeamWork, it includes both a chat interface and workflow functionality (a streamlined alternative to the desktop version of the Orchid Extender Workflow Console).

Configurable Workflows

Choose from 25+ Workflow Templates, covering common Sage 300 approval and/or notification scenarios. Use the Workflow Rules Engine to tailor them to your needs. You decide:

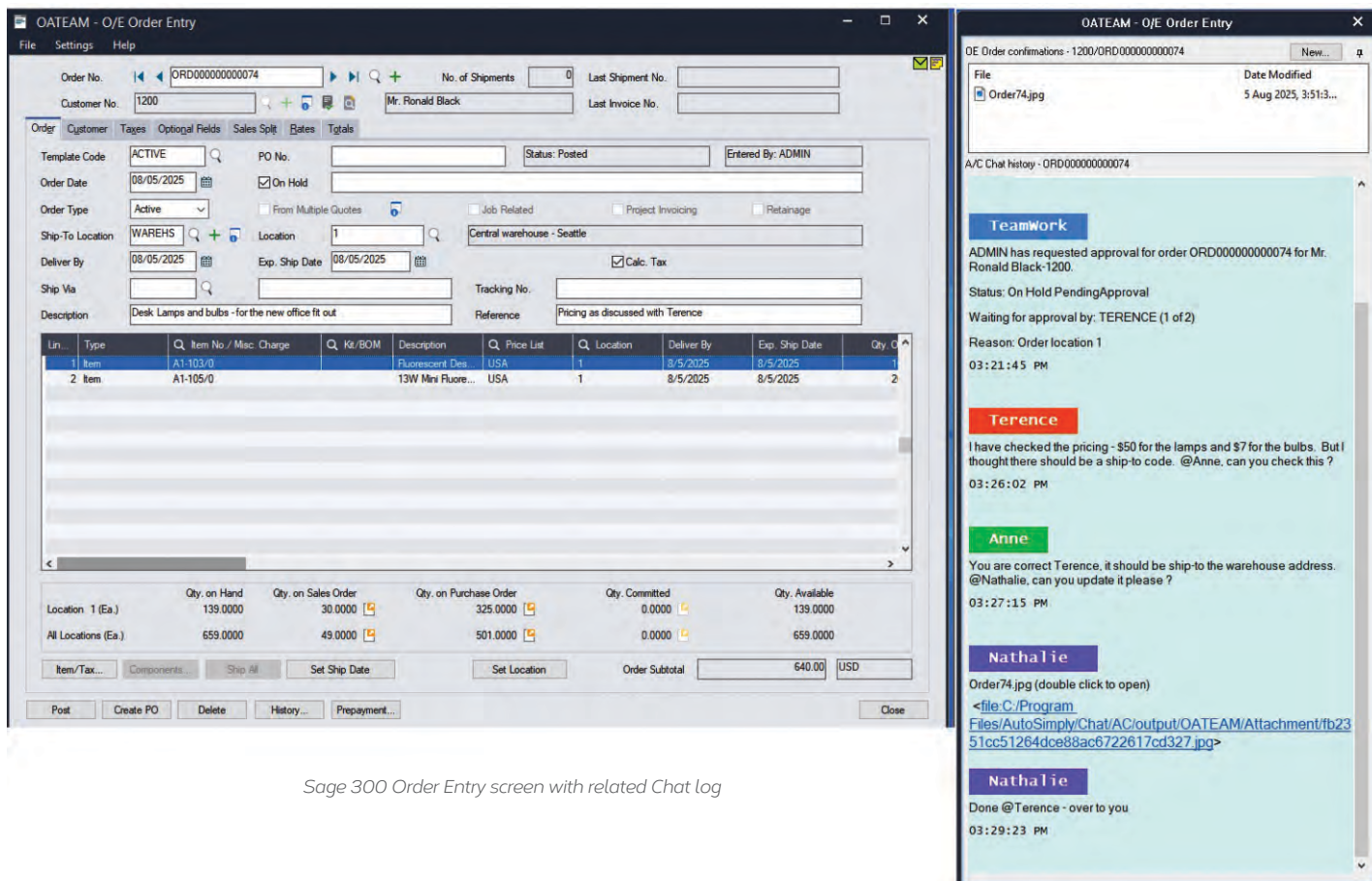
- WHAT needs to be approved (related to Sage 300 records).
- HOW to determine if approval is required (conditions).
- WHO approves (up to 5 approvers, sequential or parallel).

 TeamWork is a very impressive tool, with the way it brings all the information into one place. There is a definite need for it.

MARCO POMPONI, GENATEC, CANADA

Use Case examples

- Sales Operation team updates Sales Order status, and warehouse personnel update pick status.
- Drivers update shipment status and save proof of delivery images, automatically triggering invoicing.
- Customer, Vendor, and Item feedback is entered by and shared between sales, purchasing, and warehouse personnel.
- Request I/C stock usage or I/C Transfer from a chat without logging into Sage 300.
- Approve a Customer credit limit change.
- Request creation of a new G/L account.
- Request and approve a purchase requisition.



The screenshot displays the OATEAM - O/E Order Entry interface. The main window shows order details for Order No. ORD000000000074, Customer No. 1200, and Mr. Ronald Black. The order is in a 'Posted' status. Below the header, there are tabs for Order, Customer, Taxes, Optional Fields, Sales Split, Rates, and Totals. The Order tab is active, showing fields for Template Code (ACTIVE), Order Date (08/05/2025), Order Type (Active), Ship-To Location (WAREHS), Deliver By (08/05/2025), Ship Via, Description (Desk Lamps and bulbs - for the new office fit out), and a table of items. The items table lists two items: Item 1 (A1-103/0, Fluorescent Des, USA, 1 unit) and Item 2 (A1-105/0, 13W Mini Fluore..., USA, 2 units). At the bottom, there are buttons for Post, Create PO, Delete, History..., Prepayment..., and Close.

Overlaid on the right is a TeamWork chat window titled 'OATEAM - O/E Order Entry'. It shows a chat history for the same order. The chat includes a message from ADMIN requesting approval for the order, a response from Terence stating that pricing has been checked and a ship-to code is needed, and a response from Anne confirming the ship-to address. The chat also shows a file upload and a link to the file.

Sage 300 Order Entry screen with related Chat log

Minimum Requirements

TeamWork works in conjunction with (and requires) Sage 300, AutoSimply Chat, Orchid Notes, and the workflow capability provided by Orchid Extender (Developer edition, or Runtime if no other Extender features are being used). See the Orchid website for detailed requirements.

More information

Further information about TeamWork, including videos, is available from AutoSimply and/or Orchid's Website: www.orchid.systems



Contact your Sage Software Solution Provider