



# Extender



OrchidSystems

Sage Tech Partner

“A cost-effective way to configure, customize and extend Sage 300”

## Why use Extender?

- Customize Sage 300 without complex code
- All configurations and scripts stored securely in your Sage 300 database
- Easy to upgrade, no need to recompile your customizations
- Works with all Sage 300 core modules, plus 3rd Party modules developed in the SDK

## Extender Configurator

The Configurator edition lets you tailor Sage 300 without writing a single line of code.

## Alerts and Notifications

Configure Extender to monitor selected fields. When changes occur, trigger real-time email alerts, or display details on Sage 300 screens using Orchid Notes.

## Logging

Create an audit trail of key changes to the Sage 300 database. Log what changed, when it changed, who made the change. Access logs using context-sensitive screen icons.

EXTENDER HELPS  
MAKE SAGE 300  
THE PERFECT FIT  
FOR MY BUSINESS.



## Integration

Synchronize between systems more efficiently by calling external programs when changes occur within Sage 300.

## Workflow

Add consistency and transparency to approvals and other critical business processes with structured workflows. Pre-defined Workflow Templates cater for common business scenarios, and can be configured with our simple “What, How, Who” rules engine.



Take workflow to the next level with TeamWork for Sage 300, a mobile, chat-based collaboration and management tool co-developed by Orchid and AutoSimply.

The screenshot displays three overlapping windows from the ORCEWF - Extender application:

- ORCEWF - A/R Customers:** Shows customer details for BARMART. The Credit Limit field is highlighted with a red circle and the value 55,000.00.
- ORCEWF - Extender Log:** A table showing log entries for changes to the credit limit.
- ORCEWF - Extender Workflow Console:** A table showing workflow instances triggered by the credit limit change.

From	View ID	Field	From Key	Time	View ID	Change Number	User ID	Key	Field Name	Old Value	New Value
11/01/2021	AR0024			17:59:37	AR0024	1	ANNE	BARMART	AMTCLIMIT	55000.00	40000.00
11/02/2021				17:59:24	AR0024	1	ANNE	BARMART	AMTCLIMIT	55000.00	40000.00
8/02/2021				15:03:00	AR0024	1	NATHALIE	BARMART	AMTCLIMIT	15000.00	35000.00

Template ID	Started On	Started At	Started By	Assigned To	View ID	Record Key	Description	Requested Value
AP Invoice Batch Post	16/12/2020	14:24:35	ANNE	ACCOUNTS	AP0020	86	86-Trade show expenses Batch Status = "Ready to Post"	215.50
Create EFT File Approval	16/12/2020	14:24:55	ANNE	ACCOUNTS	AP0030	PY.1	Approval required for Batch PY.1 - A/P Payment batch	36710.25
AP Vendor Approval	16/12/2020	14:25:25	ANNE	ACCOUNTS	AP0015	1202	Vendor Approval Orchid Systems - Entry 21202 - New Vendor Ac	Active
Sales Order Approval	16/12/2020	14:35:44	ANNE	SALESMPR	DE0520	OR00000000000133	Approve - Embossed note books for Christmas for customer 1525...	4,990.00
Sales Order Approval	16/12/2020	14:59:48	ANNE	SALESMPR	DE0520	OR000000000000135	Approve - New office fit out for customer 1600 Or Dan Penn	8,902.80
RMA Approval	16/12/2020	17:03:28	ANNE	SALESMPR	RA0001	REP000000000000001	Approve RMA for 1200 - Mr. Ronald Black - Repair for items on R402	159.38
RMA Approval	16/12/2020	17:25:42	ANNE	SALESMPR	RA0001	WH000000000000005	Approve RMA for 1500 - Custom Comfort - Warranty Repair for try...	40.94
			FINMGR	AR0024	3330		The Paper Hangers set on hold, reason: They promised to pay...	Wt
			FINMGR	AR0024			New credit limit entered - Bargain Mart Stores Inc.	55000.00

Email Notification:

communications@samplecompany.ltd  
Customer BARMART Bargain Mart Stores Inc. credit limit has changed

Customer BARMART Bargain Mart Stores Inc. credit limit has changed from 40,000.00 to 55,000.00

The change was done by ANNE doing an Update to the customer's record.

The change was done on 11/02/2021 at 17:59:37

Customer Credit Limit change triggers email, Extender Log entry and Extender Workflow instance

# Work *smarter* with Orchid

## Extender Developer

The Developer edition includes all the Configurator features, while also letting you take customization of Sage 300 to the next level using Python scripts.

### Business Logic (Sage 300 Views)

Introduce custom validations, conditional alerting, or automate business processes.

### Screen Customizations

Modify existing screens in ways not possible at the View level (e.g. tailor tabs, fields, buttons, and finders). Create new screens without the need for complicated programming.

### Custom Tables

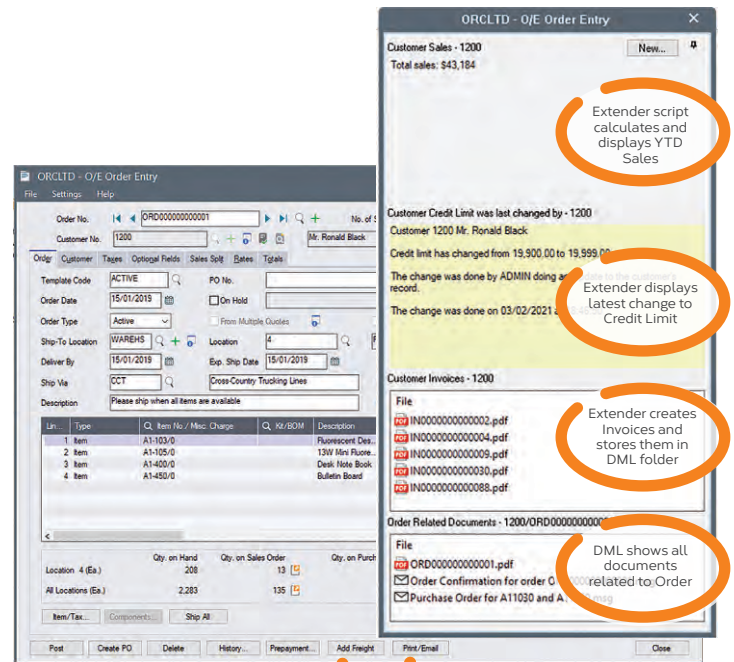
Create Sage 300 Views and associated tables, without coding. These form part of the Sage 300 database and database dictionary, so they can be accessed, dumped and loaded just like any other view.

### Advanced Workflow

Develop custom Workflow Actions using Python to complement our pre-defined actions. Incorporate Custom View/Table data into Workflow Actions.

### Advanced Integration

Eg. integrate Sage 300 with cloud-based collaboration tools, or send shipment details to the warehouse when an order is placed.



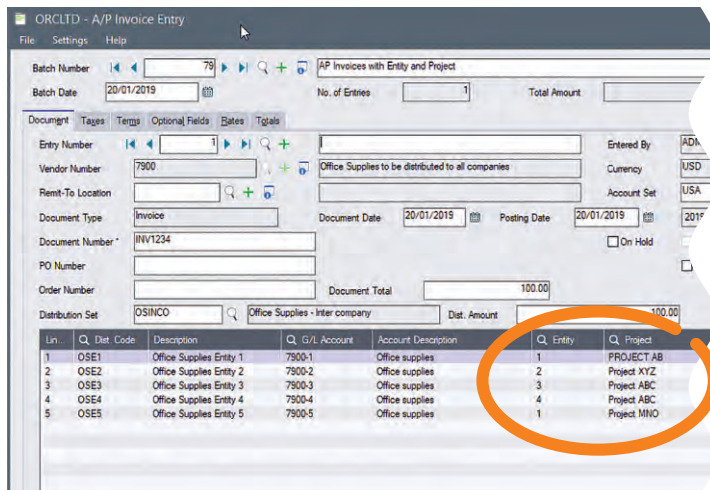
Custom button to Add Freight to order

Custom button to Print & Email Invoice

Extender adds custom buttons to Order Entry screen, and uses Orchid Notes and Document Management Link (DML) to display relevant data and files



Combine Extender Developer and Orchid Notes to generate dynamic, feature-rich 'Extended Notes'.



Screen Customization with Optional Fields (Entity & Project) added to the AP Invoice Detail grid

## Why Python?

Python is a widely used, open-source language that consistently tops "most popular language" industry surveys. We chose it as the scripting language for Extender because:

- It is an interpreted language (no compiler needed)
- Customization scripts can be stored in the Sage 300 company database
- Source code is self-documenting, and can be amended on site
- It supports the use of thousands of well-tested, open-source libraries

## More information

Further information about Extender, including videos, is available from Orchid's Website: [www.orchid.systems/products/extender](http://www.orchid.systems/products/extender).



## Minimum Requirements

Extender requires the compatible version of Sage 300 System Manager. Workflow User licences are required to access Extender Workflow functionality. Notes functionality requires Orchid Notes. Document Management Link is required to display documents. Python is installed as part of Extender. Features relate to the latest supported version.

## Contact your Sage Software Solution Provider

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