



- 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.

- 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.

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:

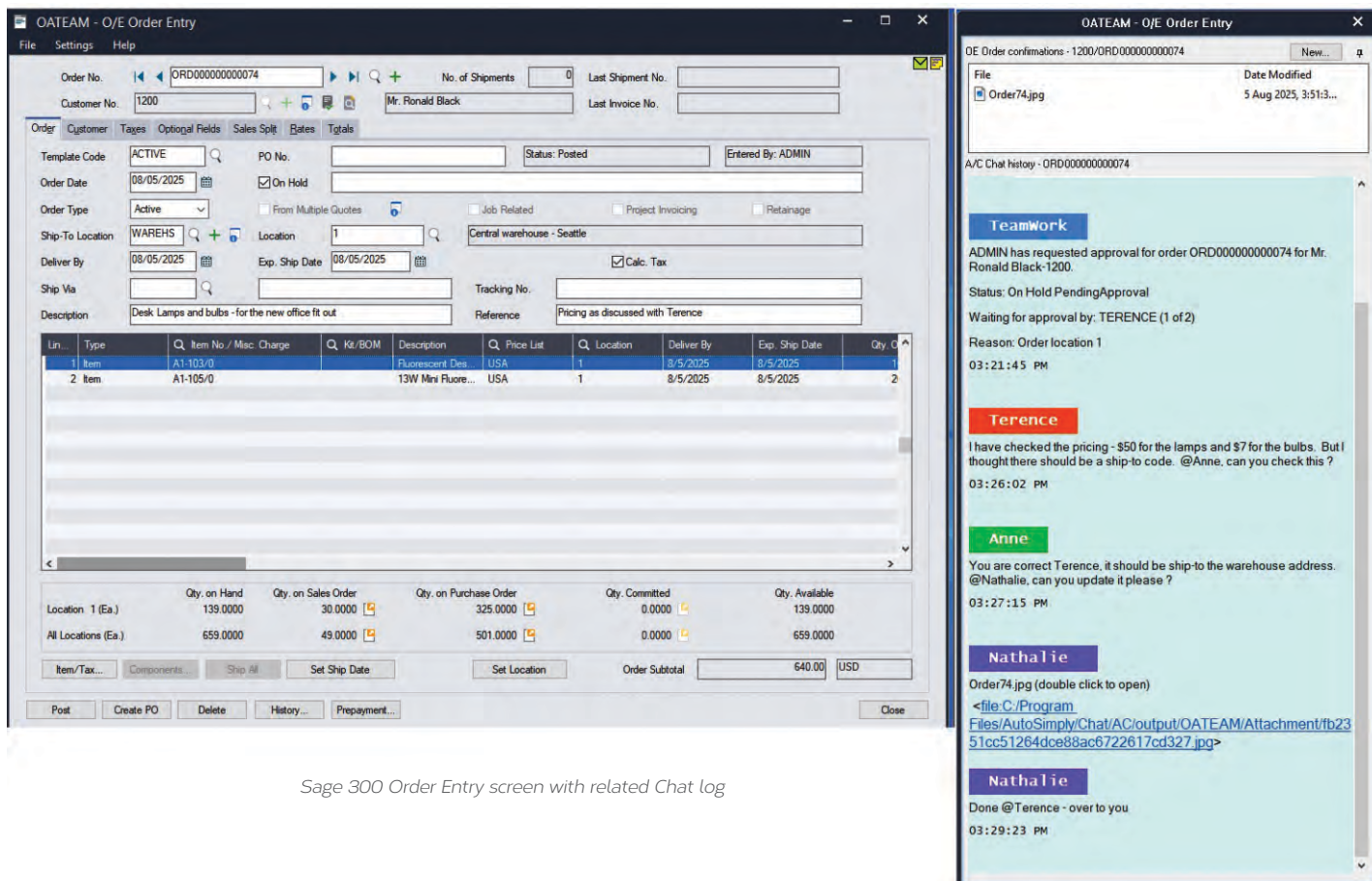
- WHAT needs to be approved (related to Sage 300 records).
- HOW to determine if approval is required (conditions).
- WHO approves (up to 5 approvers, sequential or parallel).

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

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## 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 Sage 300 O/E Order Entry interface on the left and a TeamWork chat log on the right. The Sage 300 screen shows order details for Order No. ORD000000000074, Customer No. 1200, and Mr. Ronald Black. It includes fields for Order Date (08/05/2025), Order Type (Active), Ship-To Location (WAREHS), and a list of items: 1 Item (A1-103/0) and 2 Item (A1-105/0). The chat log on the right shows a conversation between ADMIN, Terence, Anne, and Nathalie regarding the order approval and pricing.

**TeamWork Chat Log:**

- ADMIN:** ADMIN has requested approval for order ORD000000000074 for Mr. Ronald Black-1200. Status: On Hold PendingApproval. Waiting for approval by: TERENCE (1 of 2). Reason: Order location 1. 03:21:45 PM
- Terence:** I have checked the pricing - \$50 for the lamps and \$7 for the bulbs. But I thought there should be a ship-to code. @Anne, can you check this? 03:26:02 PM
- Anne:** You are correct Terence, it should be ship-to the warehouse address. @Nathalie, can you update it please? 03:27:15 PM
- Nathalie:** Order74.jpg (double click to open) <file C:/Program Files/AutoSimply/Chat/AC/output/OATEAM/Attachment/tb2351cc51264dce88ac6722617cd327.jpg>
- Nathalie:** Done @Terence - over to you. 03:29:23 PM

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](http://www.orchid.systems)



## Contact your Sage Software Solution Provider

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