

“Find out why over 7000  
companies rely on Orchid’s  
Sage 300 add-ons  
every day...”

## Collaboration

Notes, Document Management Link, TeamWork



## Streamlining Financial Processes

EFT Processing, Inter-Entity Transactions, Inter-Entity Trade



## Tailoring, Automation & Integration

Extender, Process Scheduler, Remote Action Service



## Budgeting, Reporting & Business Intelligence

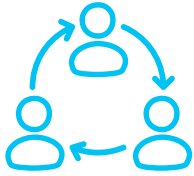
Info-Explorer, Optional Tables, Data Views, Report Runner



## Operations & Inventory Management

Return Material Authorizations, Bin Tracking





## Collaboration

Create, locate, update and share information in intuitive ways that can be easily integrated into your everyday use of Sage 300.



### Notes

#### “Information where & when it’s needed”

- Context-sensitive notes attached to just about any Sage 300 data.
- Control who sees what with role-based display rules.
- Display procedural notes to educate inexperienced users.
- Combine with Extender to create dynamic 'Extended Notes'.



### Document Management Link

#### “Easy access to essential documents”

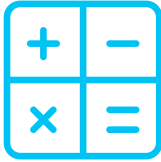
- Context-sensitive links to key documents from Sage 300 screens.
- Drag and drop files or emails to create new links.
- Seamless integration with your preferred file-sharing system.



### TeamWork

#### “Mobile, chat-based collaboration and workflow”

- Discuss, monitor and approve Sage 300 actions within a chat interface on your mobile device.
- Allow non-Sage users to participate in chats.
- Easily configure 25+ workflow templates covering common business scenarios.
- All approvals, status changes, and chats are securely stored in the Sage 300 database.



## Streamlining Financial Processes

Improve productivity & accuracy while taking the drudgery out of processing complex but routine transactions.



### EFT Processing

#### “Streamline Sage 300 payments & receipts”

- Create EFT Payment or Direct Debit files ready for uploading to your bank.
- Send remittance advices to EFT-specific email addresses.
- Numerous security features, including encryption of bank account details.
- Hundreds of bank formats already supported, others created on request.



### Inter-Entity Transactions

#### “Related entities always in balance”

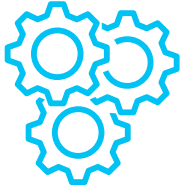
- Streamline allocations and transfers between related entities (branches, divisions, departments, funds, projects, trusts, companies).
- Generates offsetting loan account entries based on highly configurable rules.
- Entities can be within one or across multiple Sage 300 databases.



### Inter-Entity Trade

#### “Reciprocal buy & sell documents auto-generated”

- Facilitates the trading of goods or services between related entities.
- Initiate a transaction in one entity, corresponding Sage 300 entries are automatically generated in the other.
- Comprehensive audit logging to ensure that all transactions are accounted for.



## *Tailoring, Automation & Integration*

Customize Sage 300 without complex code, automate critical processes, and integrate with external applications.



### Extender

#### **“Configure, customize and extend Sage 300”**

- Monitor changes in Sage 300 to trigger configurable alerts, logging, workflows or integrations.
- Introduce custom tables, screens, and scripts with the Developer edition.
- All customizations stored in the Sage 300 database, are easily upgradeable, and can be dumped and loaded.



### Process Scheduler

#### **“Automatic scheduling of critical processes”**

- Streamline multi-company processing. E.g. run day ends, post batches, close and open fiscal periods.
- Have confidence that integrity checks and backups are happening regularly, with error notifications if problems occur.



### Remote Action Service

#### **“Action workflow tasks while on the road”**

- Progress an Extender Workflow without needing to log on to Sage 300.
- No software to install, you just need email and a browser.



## Budgeting, Reporting & Business Intelligence

Manage custom data, take control of your key reports, analyse business performance, and integrate granular budgeting & forecasting into Sage 300.



### Info-Explorer

#### “Business Intelligence for everyone”

- A powerful yet affordable BI tool supporting integrated analysis & budgeting.
- Slice and dice data for greater insight, drill through to Sage 300.
- Try before you buy with the Lite edition.



### Optional Tables

#### “Custom data stored within Sage 300”

- Create custom, multi-dimensional data structures within your Sage 300 database.
- Manipulate data in Excel then write it back to Sage 300.
- Combine with Info-Explorer for powerful, intuitive budgeting and forecasting.



### Data Views

#### “Simplify reporting of Sage 300 Optional Fields”

- Turn Optional Fields into columns for easy report writing.
- Speed up report running through more efficient access to data.



### Report Runner

#### “Launch and distribute your reports with ease”

- Streamline the setup, execution, and distribution of Crystal Reports or Sage 300 Financial Reports.
- Easily locate, launch, and access reports using role-specific menus.
- Combine with Process Scheduler to run regularly recurring reports.



## Operations & Inventory Management

Improve productivity and customer service by tightly integrating your operational processes into Sage 300.



## Return Material Authorizations

**“Accurately track returns & repairs from within Sage 300”**

- Authorize customer returns, initiate replacement orders, issue credit notes, return faulty goods to the vendor.
- Consistent, configurable, template-based workflows.
- Inventory and financial records are kept up to date and synchronized.
- Customers can be kept fully informed from a single data source.



## Bin Tracking

**“Track inventory items across multiple bins”**

- No need for a separate warehouse management system just to track multiple bins within a Sage 300 Inventory Control location.
- Warehouse staff know exactly where to store and find any inventory item.
- Streamlined picking and put-away means faster turnaround, reduced handling costs, and happier customers.

About Orchid

 7000+ Sage Sites	 80+ Countries	 30+ Years In Business	 450+ Sage Business Partners
 Sydney Australia	 10+ Industry Awards	 15+ Integrated Modules	 2+ (average) Modules Per Site



Work *smarter* with Orchid  
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