



# Which Orchid Sage 300 Add-ons are for you?

## STREAMLINING FINANCIAL PROCESSES

### EFT Processing

Do you need to send payments to vendors or employees, issue customer refunds, or collect recurring receipts?

EFT Processing supports both payments and direct debits, with hundreds of bank formats supported. You can also automatically send remittance advices by email. Tight integration with standard Sage 300 processing routines, plus numerous security features, means lower costs, improved efficiency, enhanced auditability, and reduced exposure to fraud.

 If the bank format you require isn't already supported we can generate new ones, or modify existing ones.

### Inter-Entity Transactions

Do you allocate expenses and/or revenue across multiple funds or companies, balance inter-company loan accounts, or process cash between companies?

Inter-Entity Transactions keeps those entities in balance at all times, saving hours or days each month on reconciliation. Offsetting entries are automatically generated, based on highly configurable rules, with an extensive audit trail.

### Inter-Entity Trade

Do you manage multiple entities that trade goods or services with each other?

Inter-Entity Trade automatically generates reciprocal documents. It removes the need to manually enter and check duplicate entries, leading to improved productivity, accuracy, and auditability.

## COLLABORATION

### Notes

Do staff need to regularly refer to documentation outside Sage 300, such as post-it notes and operations manuals, to complete their tasks?

Orchid Notes presents relevant, context-sensitive procedural instructions, alerts, and other information where and when it's needed, all stored, managed, and displayed within Sage 300.

 Combine Notes and **Extender** to generate and display custom, feature-rich 'Extended Notes' on the fly.

### Document Management Link

Do staff need to file, locate and refer to key documents (e.g. POs, Invoices, Contracts) when processing transactions in Sage 300 or answering customer queries?

Document Management Link (DML) can help make the paperless office a reality, putting relevant documents just a click away. It supports remote working, with seamless integration between Sage 300 and your file-sharing system (e.g. SharePoint, OneDrive, Dropbox, Google Drive).

### TeamWork

Do your customer-facing and back-office teams find themselves talking, texting, or emailing each other to discuss transactions before they can be signed off and completed in Sage 300?

TeamWork enables mobile, chat-based collaboration between Sage 300 and non-Sage users, integrated with easily configurable workflows. All chats, status changes and approvals are securely stored within Sage 300 for visibility, reporting, and auditing.

*Over 7,000 companies around the world rely on Orchid's Add-ons every day.*

## TAILORING, AUTOMATION & INTEGRATION

### Extender

Do you have business or integration requirements that can't be met by 'out of the box' Sage 300 functionality?

Extender is a cost-effective way to configure, customize and extend Sage 300. Customizations are all stored in your 300 database. They can include logging and notification of data changes, custom tables and screens, integration with external applications, and workflows to help automate your business processes.

 Take Extender Workflow on the road by combining it with **Remote Action Service** or the chat-based **TeamWork**.

### Process Scheduler

Do you rely on operations staff to manually kick off and monitor recurring processes, such as data integrity checks, backups, day-ends, and reporting?

Process Scheduler lets you set up multiple schedules as recurring jobs. They can be configured to execute automatically, outside of business hours. All results are logged, with nominated staff notified of any exceptions by email.

## OPERATIONS & INVENTORY MANAGEMENT

### Return Material Authorizations

Do you need to manage the return and/or repair of physical products?

Return Material Authorizations (RMA) lets you track returns and repairs accurately from within Sage 300, improving efficiency and customer service through consistent, configurable, workflow-based processes.

### Bin Tracking

Do you need to track items against multiple bins within a Sage 300 Inventory Control location?

Bin Tracking streamlines warehouse operations, allowing you to manage stock at bin level from within Sage 300, rather than through a separate warehouse management system.

 Bin Tracking also integrates with multiple 3rd party barcode scanning and warehouse management modules.

## BUDGETING, REPORTING & BUSINESS INTELLIGENCE

### Info-Explorer

Do you have to make do with static, two-dimensional extracts and reports when analyzing business data, and spreadsheets when producing budgets and forecasts?

Info-Explorer is a powerful yet affordable Business Intelligence tool with 'slice and dice' analysis capability, fast in-memory processing, and integrated budgeting and forecasting.

 Try the free **Info-Explorer Lite** edition. It's a working version that lets you load and analyze your own data, using a range of pre-configured cubes.

### Optional Tables

Do you store and maintain KPIs, budgets, or other custom data outside of Sage 300?

Optional Tables lets you create custom, multi-dimensional data structures within your Sage 300 database, view and manipulate the data in Excel, then write it back to Sage 300. It's particularly well suited to budgeting, allowing you to create as many budget sets as you like.

 Use Orchid's **Data Views** to turn Sage 300 Optional Fields into columns, making it easy to include them in reports.

### Report Runner

Do your staff spend a lot of time setting up, running, and distributing recurring Crystal or Sage 300 Financial Reports?

Report Runner centrally manages reports from all your Sage 300 modules. Staff can easily locate, launch, and access reports using role-specific menus. Data security is enhanced by limiting access to sensitive reports.



### MORE INFORMATION

For detailed information about the full range of Sage 300 Add-ons from Orchid, visit our website: [www.orchid.systems](http://www.orchid.systems)

### CONTACT YOUR SAGE SOFTWARE SOLUTION PROVIDER

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