



Process Scheduler



Sage Tech Partner

“Run your critical business processes automatically and unattended”

Why use Process Scheduler?

Process Scheduler removes the need for operations staff to manually kick off & monitor recurring Sage 300 processes.

- Avoid resource conflicts by executing critical processes outside business hours
- Have confidence that your data is being checked and backed up on a regular basis
- Status notifications and error alerts can be automatically emailed for peace of mind
- Detailed history logs let you report on the success or failure of scheduled actions at any time

Easy to learn and use, with the standard Sage 300 look and feel, Process Scheduler lets you create and run complex schedules without requiring any coding.



Combine Process Scheduler with **Report Runner** and **Info-Explorer** to automate the execution, refresh, and distribution of reports and cubes.

THESE RECURRING PROCESSES TAKE CARE OF THEMSELVES, LEAVING ME TO FOCUS ON IMPORTANT ISSUES.



System Process Automation

Automate Sage 300 tasks across multiple companies, centralized within a single database. Typical examples include:

- Running day ends, and optionally posting batches
- Managing the closing and opening of fiscal periods
- Executing custom processes and programs
- Notification of changes to active Sage 300 Modules and Product Update details



Use Process Scheduler to run **Extender** scripts for time-based custom integrations, audits, and notifications (e.g. low stock alerts)

O11 - Process Scheduler Schedules

File Help

Schedule ID: DAYEND

Description: Day end in ORCLTD, ORCIN2, ORCIN3 and ORCIN4

Active

Send e-mail: Only if errors

Email To: Orchid.Systems.Modules@gmail.com

Email CC:

Message ID: DAYENDERROR

Company:

Lin...	Step Number	Q	Company	Action	Next step on er...	Next step on success	Date last run	Time last run	Last status	Number of errors	Last log
1	1		ORCLTD	Run I/C day end	10	5	8/10/2019	16:25:47	Success	0	
2	5		ORCLTD	Post all system batches	10	10	8/10/2019	16:27:53	Success	0	
3	10		ORCIN2	Run I/C day end	20	15	8/10/2019	16:28:47	Success	0	
4	15		ORCIN2	Post all system batches	20	20	8/10/2019	16:29:27	Success	0	
5	20		ORCIN3	Run I/C day end	30	25	8/10/2019	16:29:32	Success	0	
6	25		ORCIN3	Post all system batches	30	30	8/10/2019	16:29:40	Success	0	
7	30		ORCIN4	Run I/C day end	0	35	8/10/2019	16:29:42	Success	0	
8	35		ORCIN4	Post all system batches	0	0	8/10/2019	16:29:49	Success	0	

Save Delete Run Audit Log Detail... Close

Schedule to Run a Day End, and post Day End batches, for multiple companies

Work *smarter* with Orchid

Flexible Setup

Create multiple automated tasks to run on separate recurring schedules, taking advantage of the flexible scheduling capability provided by Windows Task Scheduler.

- Run tasks across multiple Sage 300 databases, removing the need to log into each company
- Specify what happens next upon the success or failure of any scheduled action
- Define email templates for status notifications, to be sent whenever a schedule completes or only if errors occur

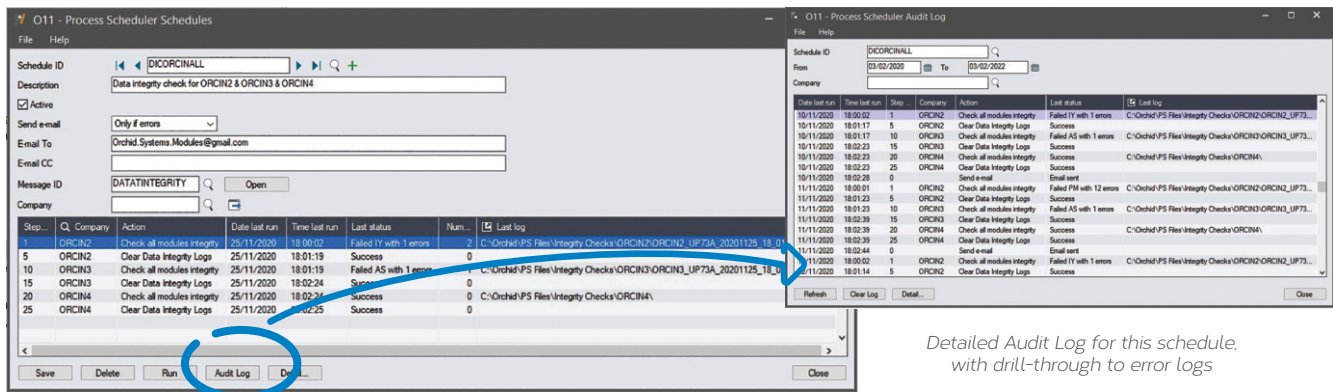
 Orchid Process Scheduler works like a charm! Awesome product. The client loves it.

BRIAN MCINTYRE, DSD-CRM SOFTWARE, WINNIPEG, CANADA

Data Integrity & Management

Schedule Sage 300 to check the integrity of your data unattended, and send alerts when new errors are detected. Automate your data storage and backup regime.

- Specify which companies and which modules must be checked
- Maintain a history of previous integrity check results, and optionally clear old logs
- Automatically dump your data for backup
- Check disk space, and email operations staff if below a threshold
- Keep your testing and reporting databases up to date with overnight refreshes



The screenshot shows two windows from the Orchid Process Scheduler. The left window, titled 'O11 - Process Scheduler Schedules', displays a list of scheduled tasks. The selected task is 'Data integrity check for ORCIN2 & ORCIN3 & ORCIN4'. Below the list, there are buttons for 'Save', 'Delete', 'Run', 'Audit Log', and 'Details'. The 'Audit Log' button is circled in blue. The right window, titled 'O11 - Process Scheduler Audit Log', shows a detailed log of the selected task's execution. It includes columns for 'Date last run', 'Time last run', 'Step', 'Company', 'Action', 'Last status', and 'Last log'. The log shows several entries, with one entry for 'Failed AS with 1 errors' highlighted in blue. A blue arrow points from the 'Audit Log' button in the left window to the highlighted entry in the right window.

Schedule to run Integrity Checks and clear old logs

Detailed Audit Log for this schedule, with drill-through to error logs

Edition Guide

Choose from these 3 Levels, and upgrade if your requirements change. (See the Orchid website for a more detailed, comprehensive list of supported actions.)

Level 1

Supported actions include:

- Data Integrity checks
- Database dumps & disk space checks
- Run Report Runner for Crystal Reports
- Refresh Info-Explorer cubes
- Run Extender scripts & send emails
- Active Module notifications

Level 2 (Day End & Posting)

Includes all Level 1 Actions, plus:

- Run Day End (IC and PO)
- Post AR/AP/GL batches
- Post IC documents
- Post PJC documents
- Post System batches

Level 3 (Advanced Actions)

Includes all Level 1 & 2 Actions, plus:

- Database Load & Copy
- Run Program (Wait or Don't Wait)
- GL Consolidations Export & Import
- Run Report Runner for GL Financial Reports
- Open or Close Period
- Open Year
- Create GL Year



More Information

Further information about Process Scheduler, including videos, is available from Orchid's website: www.orchid.systems/products



Minimum Requirements

Process Scheduler requires Sage 300 System Manager. Users can upgrade from one level to the next. Features relate to the latest supported version.

Contact your Sage Software Solution Provider

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