TeamWork
for Sage 300

TeamWork Getting Started Guide:

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Table of Contents

How to Install TeamWork *6*

Overview **6**
Step 1. Install Sage 300 modules **6**
Step 2. Setup TeamWork **6**
Step 3. Enable TeamWork Approvals in Extender **7**
Step 4. Configure business rules **7**

Installing Sage 300 modules *9*

Step 1. Installation Steps **9**
Step 2. Activate Modules **9**
Step 3. Restart the Sage desktop **9**
Step 4. Configure Extender script path **9**
Step 5. Enter activation codes **10**
Enter registration details for AC Chat 10
Enter activation codes for Extender and Information Manager. 10
Minimum Requirements **11**

Setup TeamWork *12*

Setup A/C Chat *13*

Before you start **13**
Key steps **13**
A/C Chat template considerations **15**
Link Type 16
Workflow Fields 16
Preset users 16
Custom Inquiries 17
Signature example **17**

Setup Extender *18*

Before you start **18**
Key steps **18**

Import TeamWork Module *20*

Next Step: enter connection details **21**

Installing TeamWork App *22*

Before you start **22**
TeamWork User setup **22**

How to enable TeamWork workflows *24*

Before you start **24**

Step 1. Import Workflow modules in Extender **24**
Step 2. Enable workflow **25**
Step 3. Configure business rules **25**

Enable TeamWork Modules ***26***

Available Modules **26**
Import modules **27**
Enable/Disable **27**
Configure workflows **28**
Add Workflow Rules 28
Setup Workflow Rules Options 28
Amend message templates 28

Workflow Rules ***29***

To use the screen **29**
Security Required 29
Update the default rules 29
To create a new set of rules 29
What does the Workflow applies to? **29**
How do you determine if approval is required? **30**
Who approves? **30**
Excluding Entered by 30
Approvers for notifications only workflow templates 31
Options Tab **31**
Substitution and escalation 32

TeamWork Workflow Tutorials ***33***

G/L Journal Batch Approval ***34***

What is G/L Journal Batch workflow template? **34**
How to setup G/L Journal batch approval? **36**
Before you start 36
Configure Workflow Rules 36

Using the GL Journal Batch approval workflow ***40***

Submit the batch for posting **40**
Viewing chat and status **45**
Workflow history and audit logs 46

O/E Sales Order Approval ***47***

What is Sales Order Approval? **47**
How to set up Sales Order Approval? **49**
Before you start 49
Setting up workflow rules: 49

Using the Sales Order approval workflow 53

Starting the workflow 53

Viewing chat and status 56

Workflow history and audit logs 57

O/E New Shipment Notification 58

What is an O/E Shipment Notification? 58

How to set up Shipment Notification? 60

Before you start 60

Setting up workflow rules: 60

Using the OE Shipment Notification workflow 62

Starting the workflow 62

Viewing chat and status 66

Workflow history and audit logs 66

Purchase Order Approval 67

What is Purchase Order Approval? 67

How to set up Purchase Order Approval? 69

Before you start 69

Setting up workflow rules: 69

Using the Purchase Order approval workflow 73

Starting the workflow 73

Viewing chat and status 76

Workflow history and audit logs 76

How to Install TeamWork

OVERVIEW

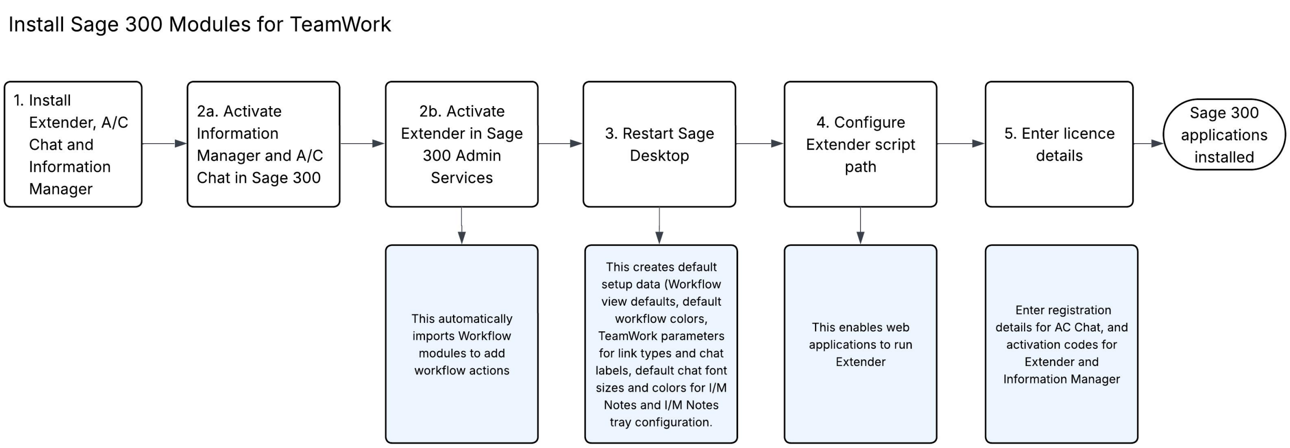
You install and activate Sage 300 modules (AC Chat, Extender and Information Manager).

You can then setup A/C Chat, Extender and TeamWork.

You can then import TeamWork workflow modules and configure the workflow rules (What, How, Who) in Extender.

STEP 1. INSTALL SAGE 300 MODULES

For details:Installing Sage 300 modules on page 9



STEP 2. SETUP TEAMWORK

You need to select options and setup configuration in AC Chat and Extender.

For details:

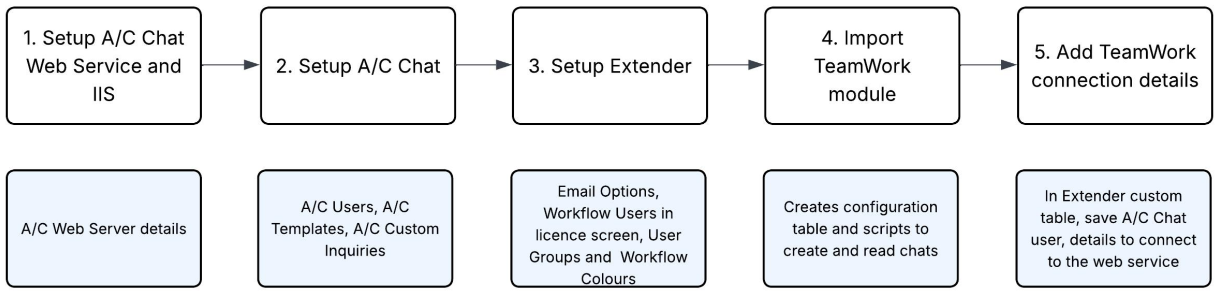
Setup A/C Chat on page 13

Setup Extender on page 18

Import TeamWork Module on page 20

Configure TeamWork connection details

Setup AC Chat and Extender



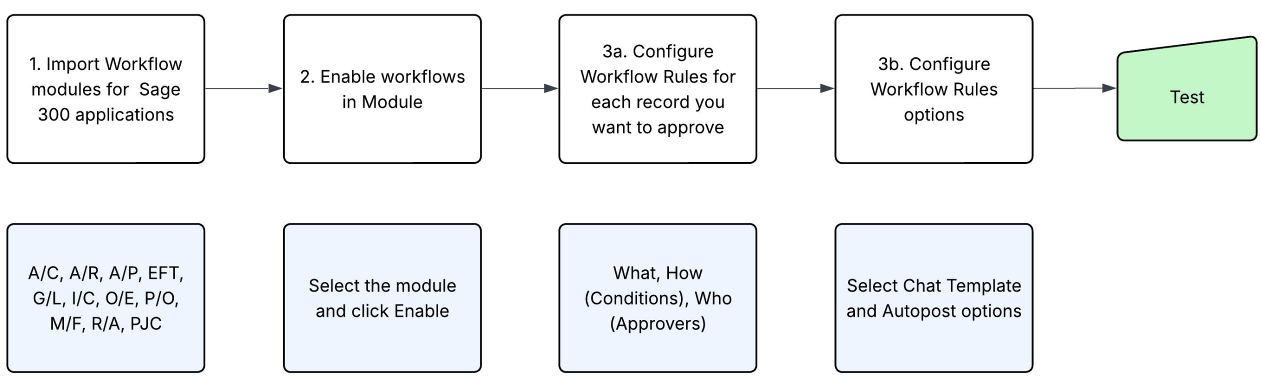
STEP 3. ENABLE TEAMWORK APPROVALS IN EXTENDER

TeamWork includes workflow templates for many Sage 300 processes. You can import the modules and configure the relevant workflow rules and options.

You are then ready to test the alerts and approvals.

For details:How to enable TeamWork workflows on page 24

Enable TeamWork Workflows



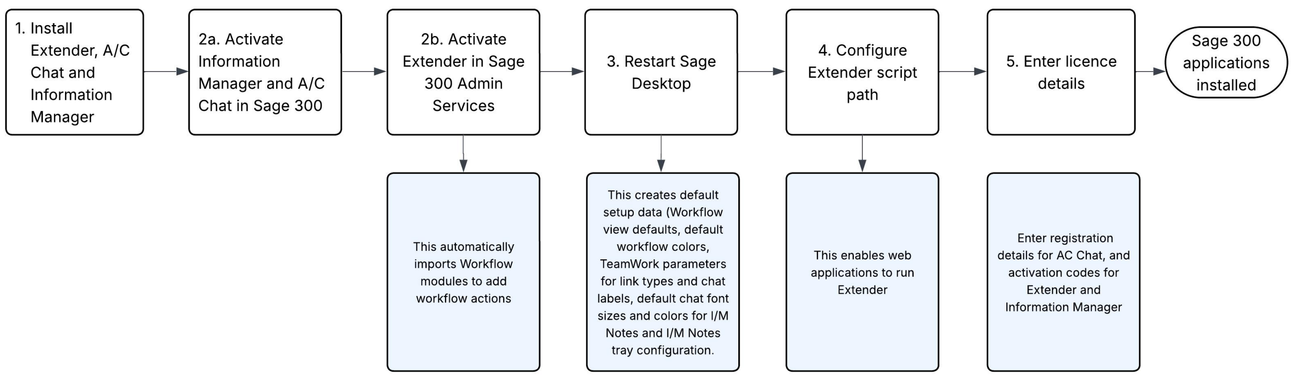
STEP 4. CONFIGURE BUSINESS RULES

1. Add Workflow Rules (conditions and approvers) for each record type you want to approve.
   a. See details and examples Extender Workflow Tutorials
   b. Amend message templates (if required).
2. Select approval options (Chat template and posting options)
3. Test and adjust workflow rules as required

Refer to details on workflow rules: Workflow Rules on page 29

Installing Sage 300 modules

Install Sage 300 Modules for TeamWork



STEP 1. INSTALLATION STEPS

A/C Chat, Extender and Information Manager are installed by executing the EXE program downloaded for installation.

STEP 2. ACTIVATE MODULES

- Activate A/C Chat and Information Manager in Sage 300 Administrative Services > Data Activation.
- Activate Extender (in a separate step)

STEP 3. RESTART THE SAGE DESKTOP

This step runs the Workflow activation script and creates default setup data (Workflow view defaults, default workflow colors and other default parameters).

STEP 4. CONFIGURE EXTENDER SCRIPT PATH

As TeamWork uses IIS, you need to ensure that the IIS user can run scripts.

In the Registry Editor, add a new Key called Extender and a new StringValue called ScriptPath in the Extender key.

1. You can use either LOCAL_MACHINE or CURRENT_USER - Extender will first check for CURRENT_USER and only use LOCAL_MACHINE if CURRENT_USER is not set.
   a. Set CURRENT_USER if you want the setting to only apply to the current Windows user.

b. Set LOCAL_MACHINE if you want the setting to apply to ALL users.

2. Set the value to a path that all users have write access to.

For details, see Changing Extender script path

STEP 5. ENTER ACTIVATION CODES

Enter registration details for AC Chat

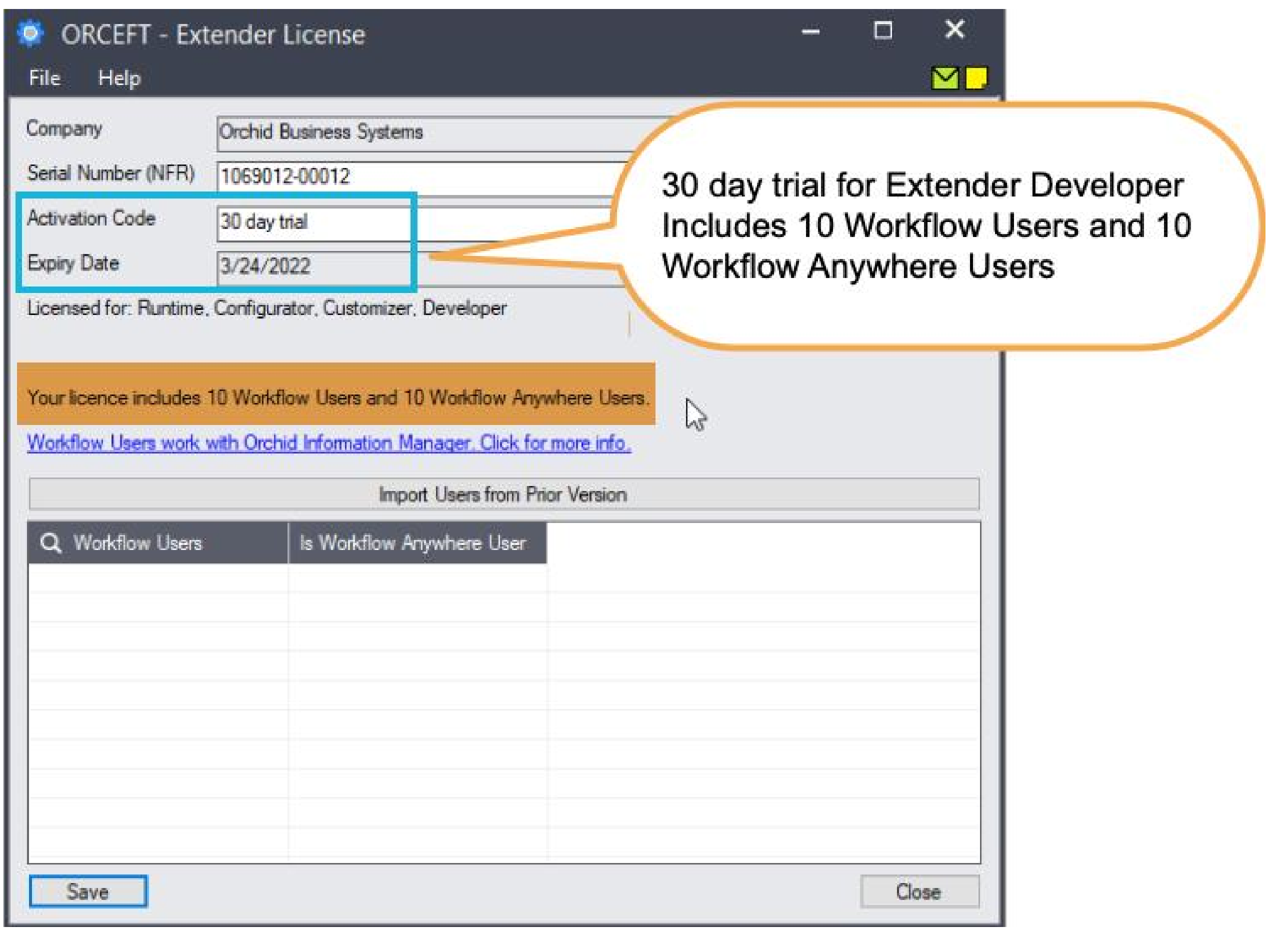
Refer to AutoSimply documentation for details.

Enter activation codes for Extender and Information Manager.

To start using Extender, you need a valid serial number and license file.

If you don't have a valid license for Extender, you only see the License screen.

Refer to Extender License Screen for details on entering Activation Code.



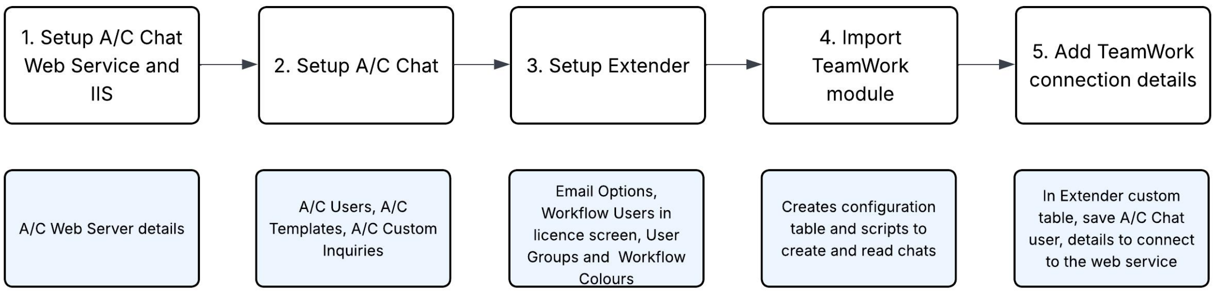
MINIMUM REQUIREMENTS

You need to use the same version for the core Sage 300 modules and Extender. For example, Extender version 2026 requires Sage 300 System Manager version 2026.

Additional specific Sage 300 modules may be required to enable all functionality. Refer to Orchid Systems's website for details (https://www.orchid.systems).

Setup TeamWork

Setup AC Chat and Extender



Setup A/C Chat

Refer to A/C Chat documentation on the AutoSimply website for details.

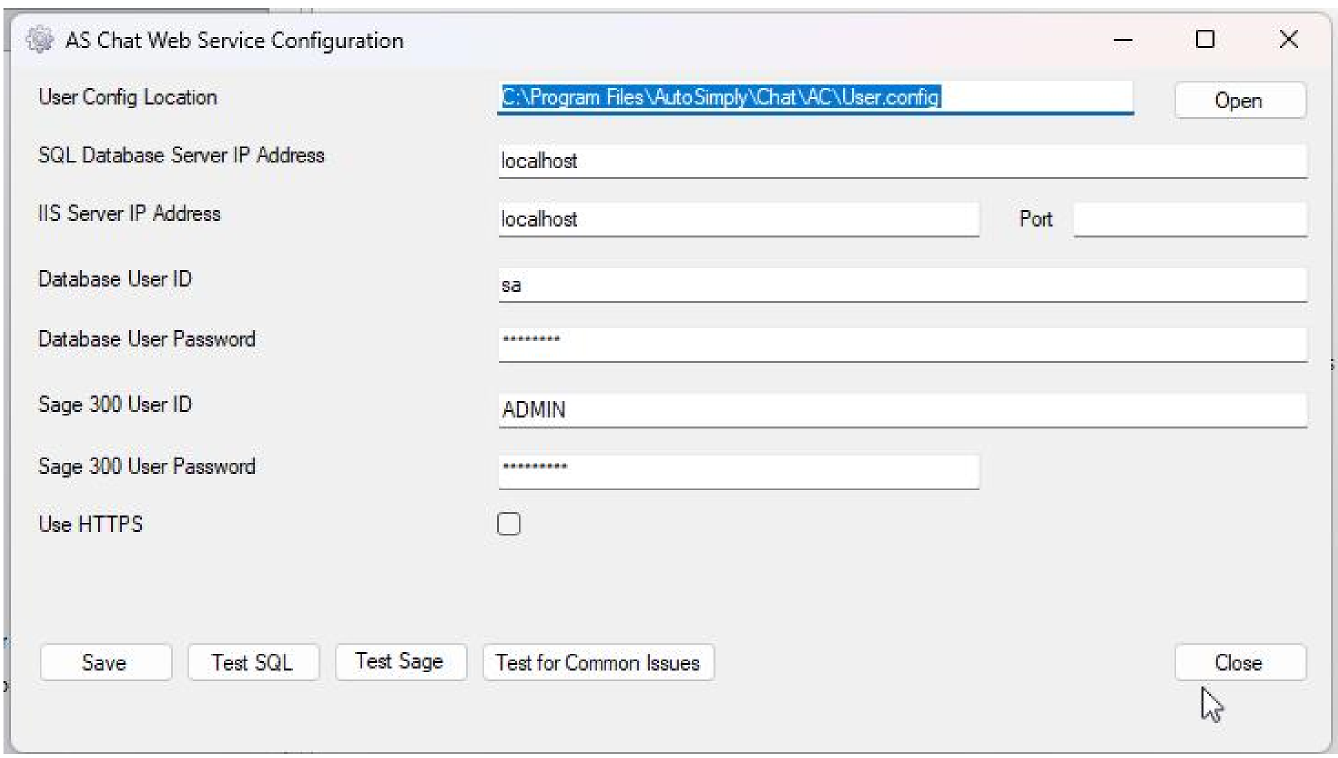
BEFORE YOU START

Step 1: Install and activate A/C Chat for your version of Sage 300.

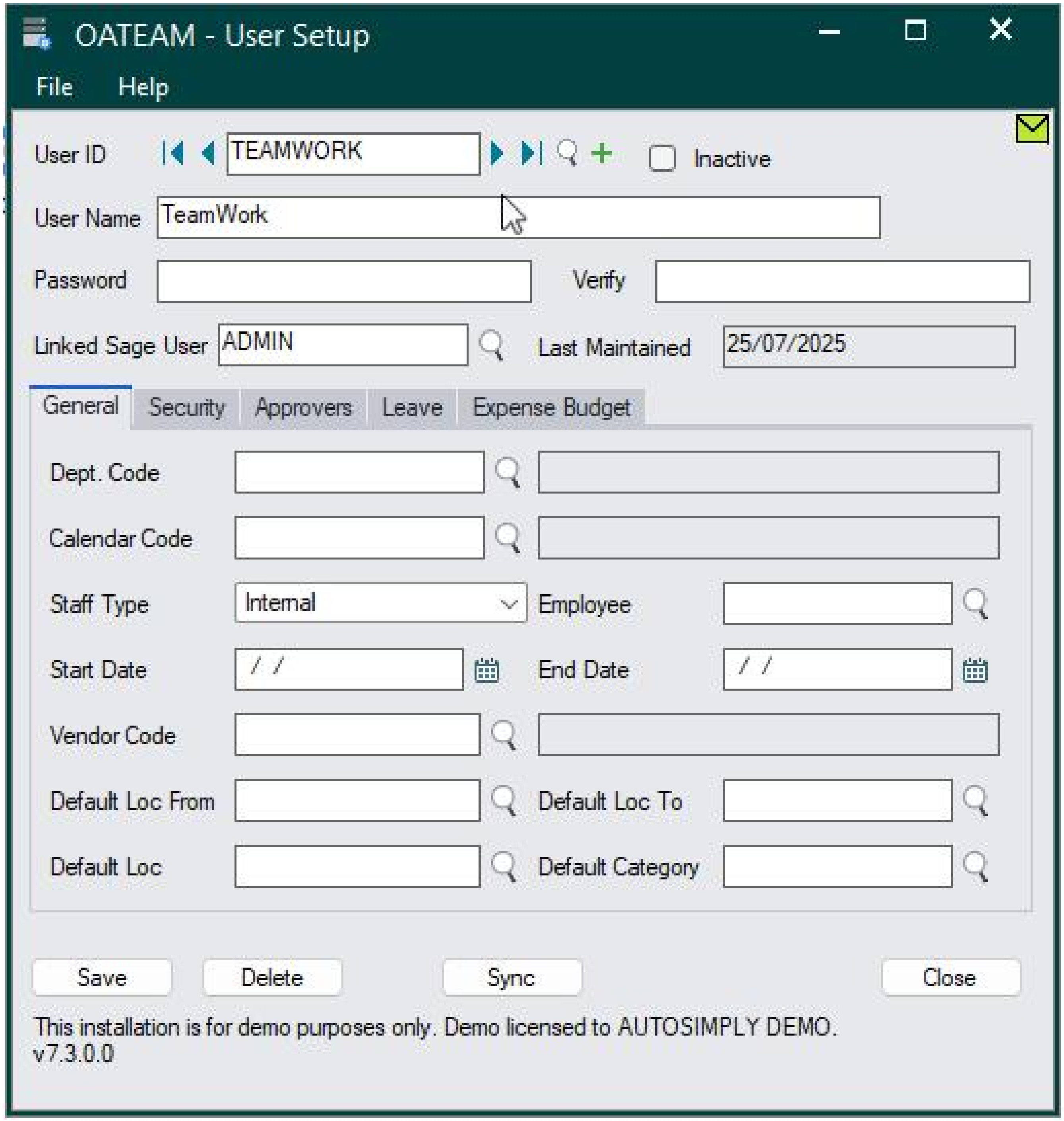
Step 2: Enter A/C Chat licence details

KEY STEPS

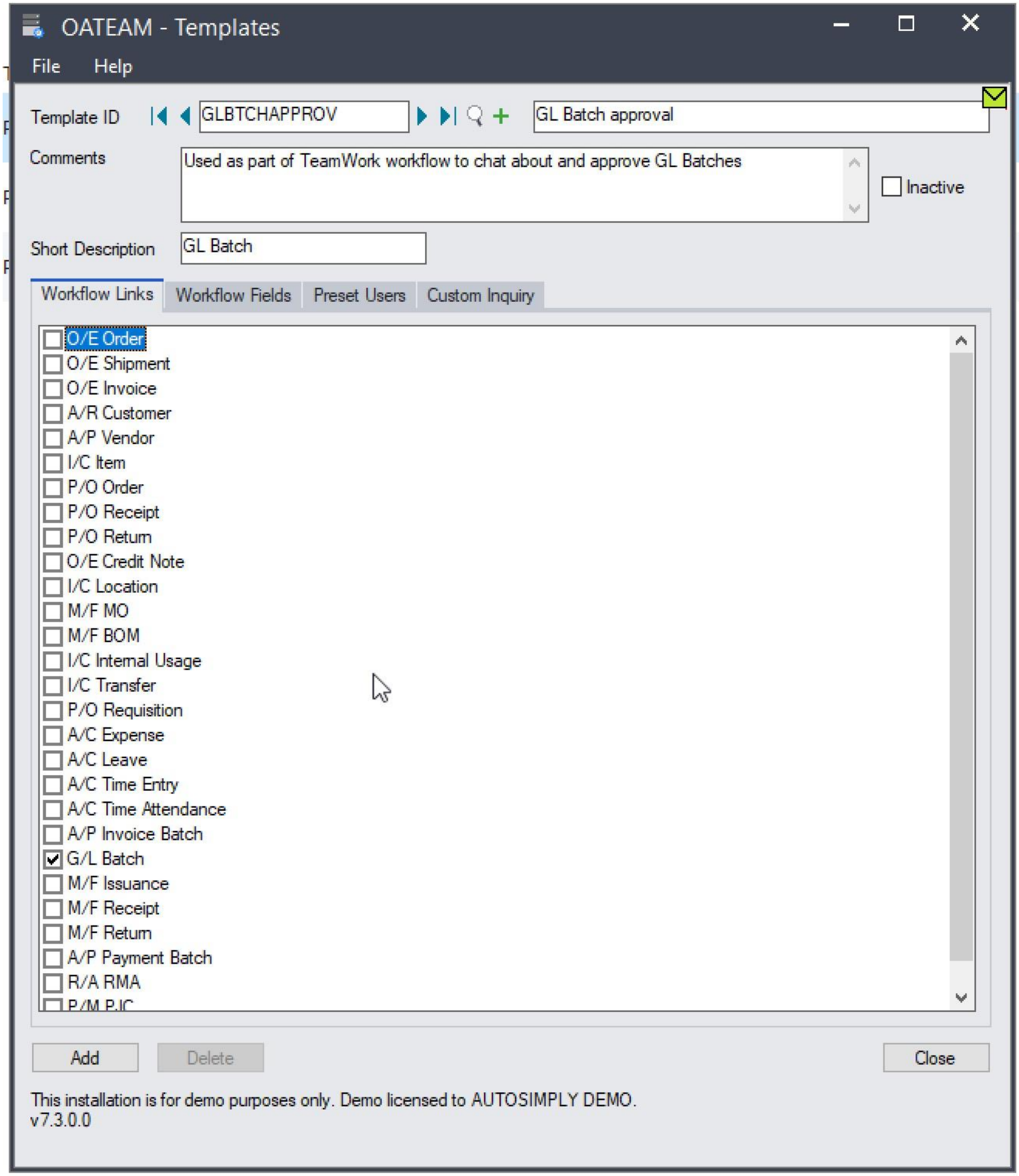
Step 1: Configure AC Chat Web Service and IIS



Step 2: Add A/C Chat users, including a TeamWork user . The TeamWork user is used to connfigure the integration.



Step 3: Add A/C Chat templates for the records you want to use in TeamWork



A/C CHAT TEMPLATE CONSIDERATIONS

A/C Chat templates are a core part of TeamWork and the integration of chats with Sage 300 records.

Link Type

The Link Type determines the type of records to chat about and to approve if the TeamWork Extender workflow is enabled.

Select the link type corresponding to the record you want to chat about approve in TeamWork.

> **Note:**
> If there is no Link Type for the record (e.g. GL Account or Peresoft CashBook batch), users cannot chat about the record directly. To approve in the app, they need to use the Extender Approval button in the Action menu.
>
> New link types will be added over time based on demand. Contact Orchid or AutoSimply for requests.

Workflow Fields

This determines the optional fields that can be edited in the A/C Chat App (if the users have the required security rights).

In the TeamWork context, the most commonly used one is the Signature.

Enable the signature field in the A/C Chat template to allow users to capture a signature in the A/C Chat App.

> **Note:**
> Currently, you can only capture 1 signature per record. A/C Chat assumes that the signing action closes the optional fields entries.
>
> TeamWork can only capture the signature of the final approver.

Preset users

Add users who need to view or participate in the chat. Select their Admin (add/remove members to the chat) and Edit rights (update configured optional fields).

By default, TeamWork workflow includes all preset users in the chats created by the workflows, with their configured security rights.

If you don't want to include preset users, do not add preset users to the A/C Chat template.

> **Note:**
> TeamWork adds the **user** who starts the workflow to the chat with `No Admin` and `No Edit` rights.
>
> **Approvers** have both `Admin` and `Edit` rights in chats created by TeamWork.
>
> If required, this can be edited in the workflow template.

Custom Inquiries

You can add custom inquiries based on SQL Statements for users to get additional information on the records they chat about or approve.

Details are included in the A/C Chat documentation.

SIGNATURE EXAMPLE

To capture a signature as part of the workflow, enable the signature field in the A/C Chat template.

Users with "Edit" rights in A/C Chat can capture a signature in the A/C Chat App.

Note:
Currently, you can only capture 1 signature per record. A/C Chat assumes that the signing action closes the optional fields entries.

TeamWork can only capture the signature of the final approver.

Tip:
If a user cannot sign in the chat:

- Check that the Signature optional field is enabled in the Workflow Fields Tab on the A/C Chat template configured in the Workflow Rule
- Check that the user has "Edit" rights in the chat.

Setup Extender

BEFORE YOU START

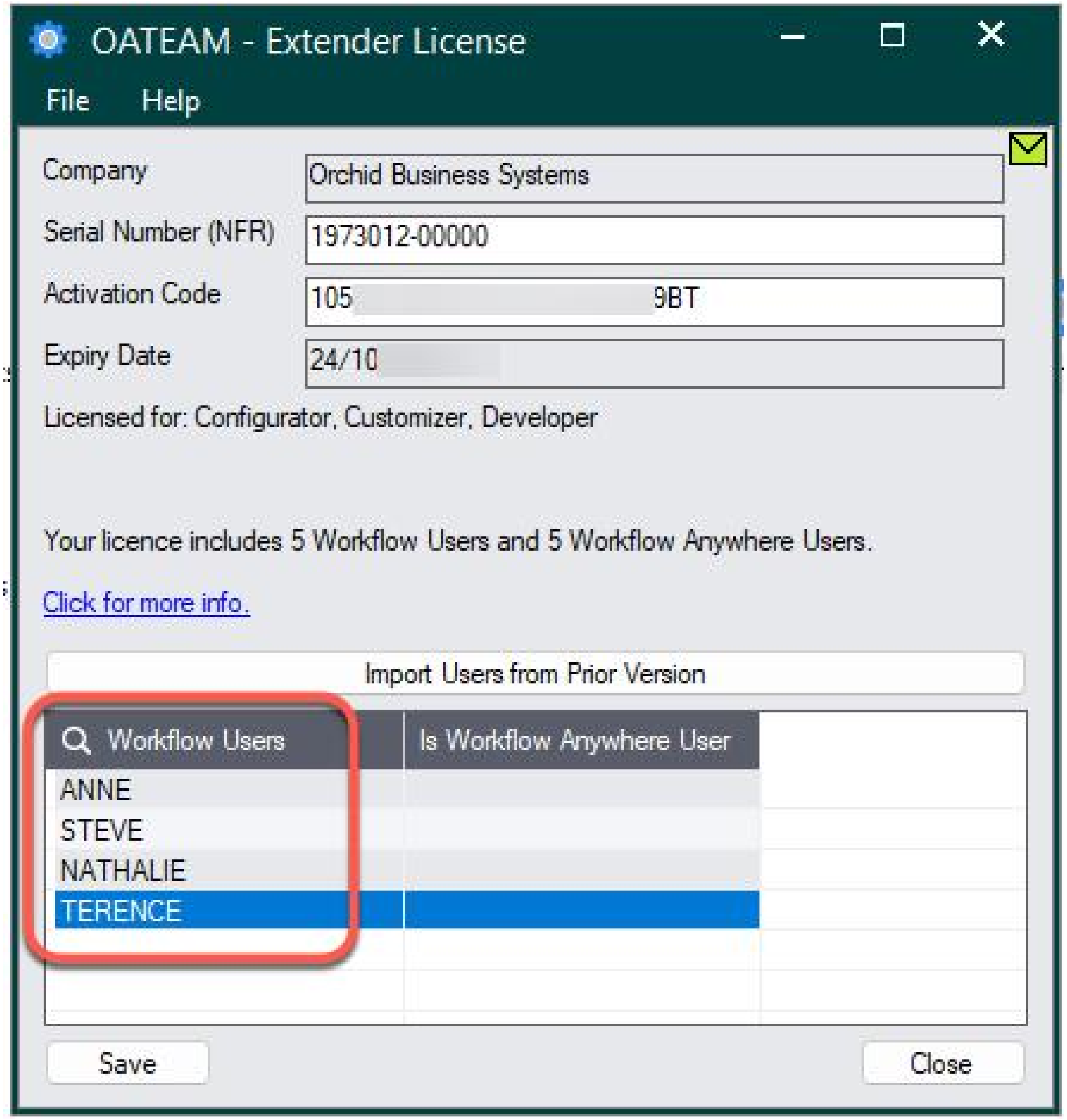
Install the modules and setup A/C Chat

KEY STEPS

This is the minimum setup required to use Extender with TeamWork

Step 1: Setup Email SMTP details in Extender options. Extender Email Tab

Step 2: Add workflow users to the Extender Licence screen. Workflow users are only used for approvers. Understanding Workflow Users



Step 3: Optionally, create user groups so you can assign approvals to groups of users. Workflow User Groups

Step 4: Optionally, add workflow colours for use in the workflow rules and the workflow console. Workflow Colours

Import TeamWork Module

TeamWork includes an Extender Module to enable the integration between A/C Chat and Extender.

You need to import the TeamWork.vi module in the VIXXA folder using the Extender Setup > Modules screen.

When the TeamWork module is installed and configured, Extender workflow templates can create Chat records and send messages to a chat.

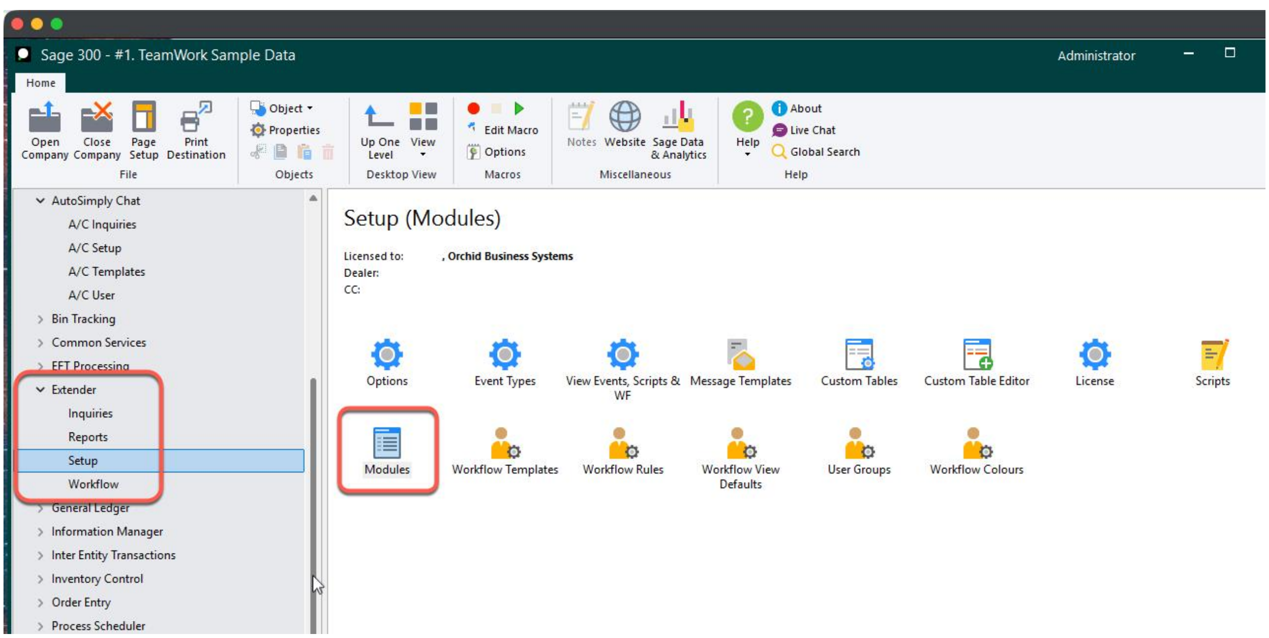
Step 1: You need to import the TeamWork.vi module in Extender Setup>Modules .

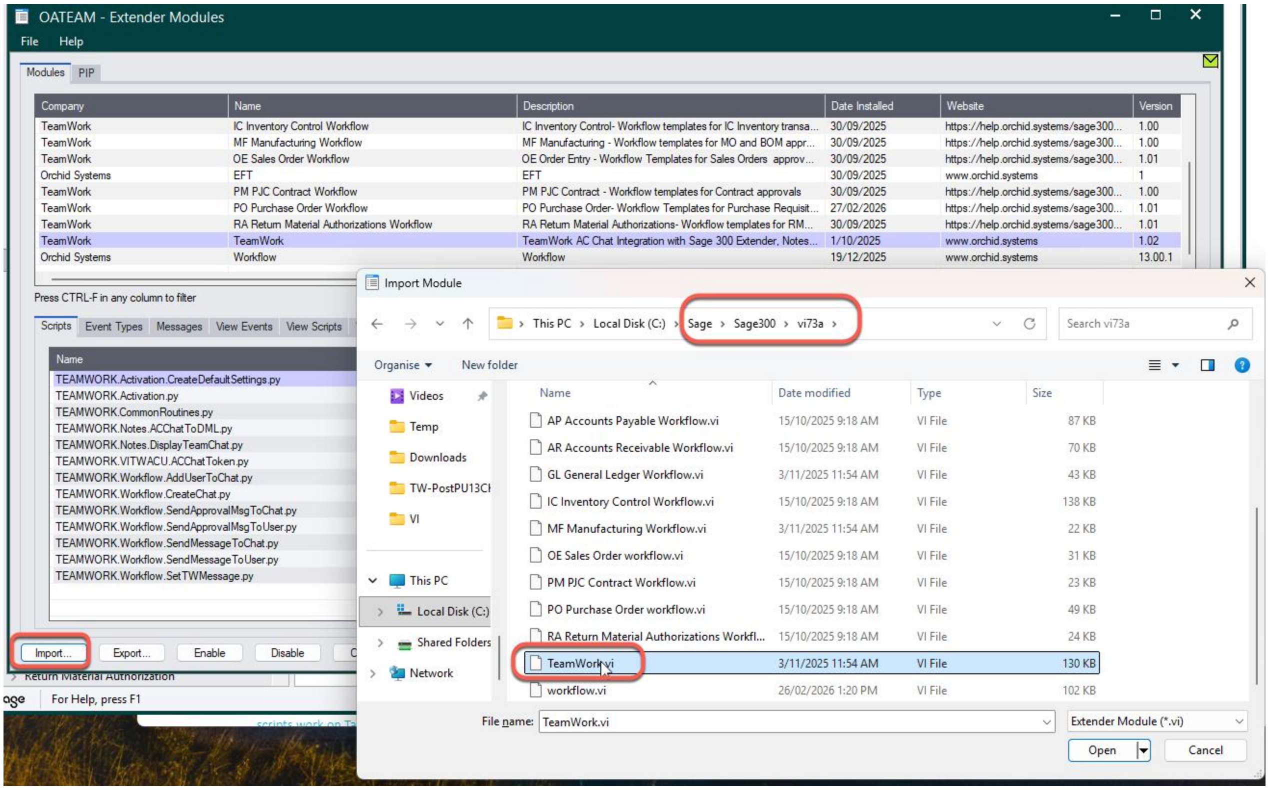
> **Note:** This creates custom tables to add TeamWork connection details and adds workflow actions to use in Workflow Templates.

> **Note:** When upgrading to the latest update, you need to import the TeamWork.vi again.

Step 2: Restart the Sage desktop.

> **Note:** This creates default configuration details for TeamWork: Default workflow colors, Link types and labels to map Information Manager options to A/C Chat templates, default colors and font sizes used to display chat messages in I/M Notes, I/M Options configuration records to display A/C Chats in Sage 300 screens.





NEXT STEP: ENTER CONNECTION DETAILS

Install TeamWork Module

Installing TeamWork App

BEFORE YOU START

Install and Configure the modules in Sage 300.

How to Install TeamWork on page 6

TEAMWORK USER SETUP

The TeamWork app is available for Android, iOS and Windows devices.

Refer to A/C Chat documentation for details on installing the App from the appropriate store.

Step 1: Download A/C Chat app for app users.

Step 2: In the App settings, enter the IP Address of your server, provided by your administrator and your user name and password.

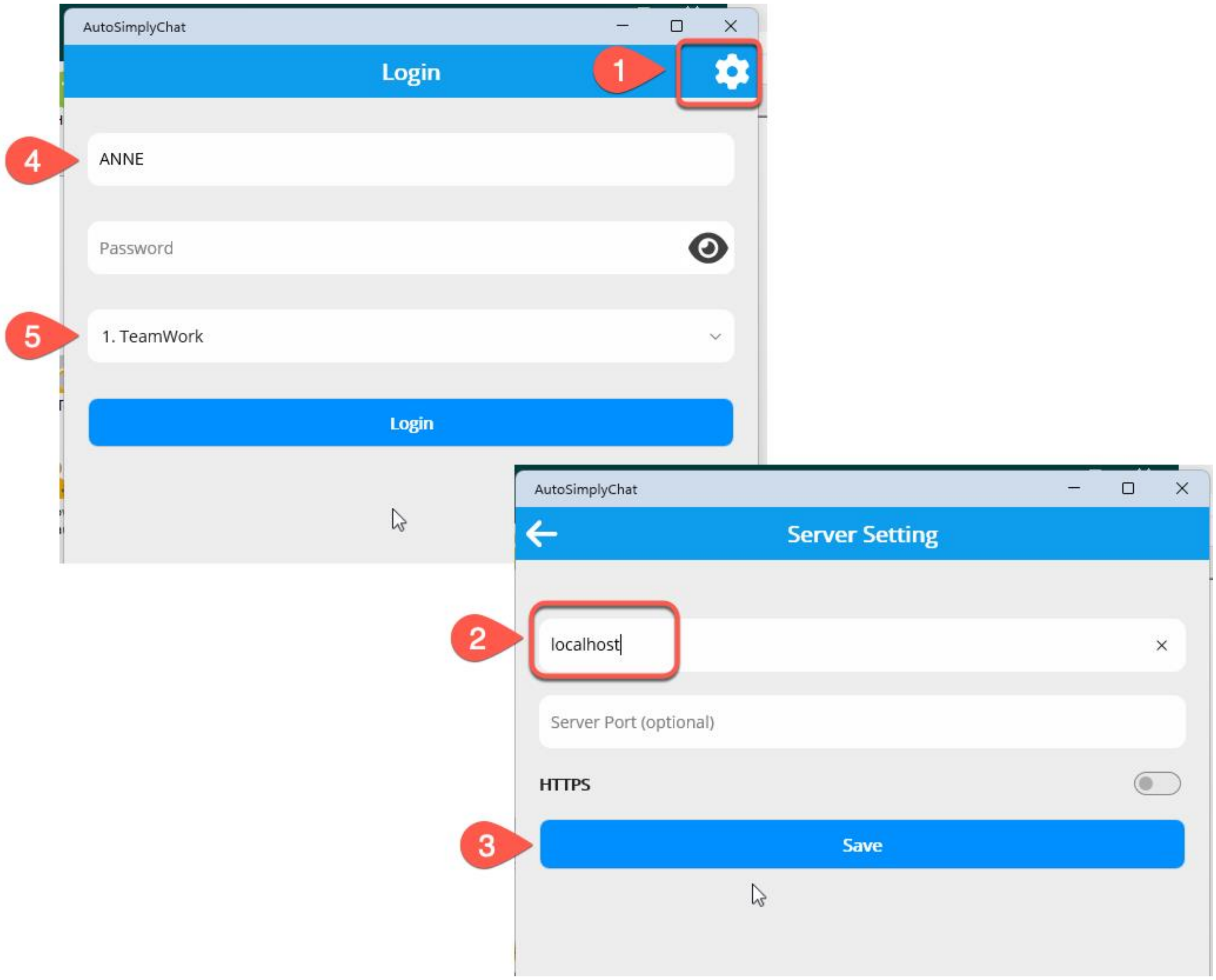
Step 3: Save and go back to the login screen

Step 4: Enter a username and password for a user configured in A/C Chat.

Step 5: Select the Sage 300 database where A/C Chat is activated that you want to use.

Users need to be setup in A/C Chat Users.

Users who approve records (in the TeamWork A/C Chat app or in the Extender Workflow Console) need to have a Workflow User licence in the Extender License screen.


AutoSimplyChat
Login
1
4
ANNE
Password
5
1. TeamWork
Login
AutoSimplyChat
Server Setting
2
localhost
Server Port (optional)
HTTPS
3
Save

How to enable TeamWork workflows

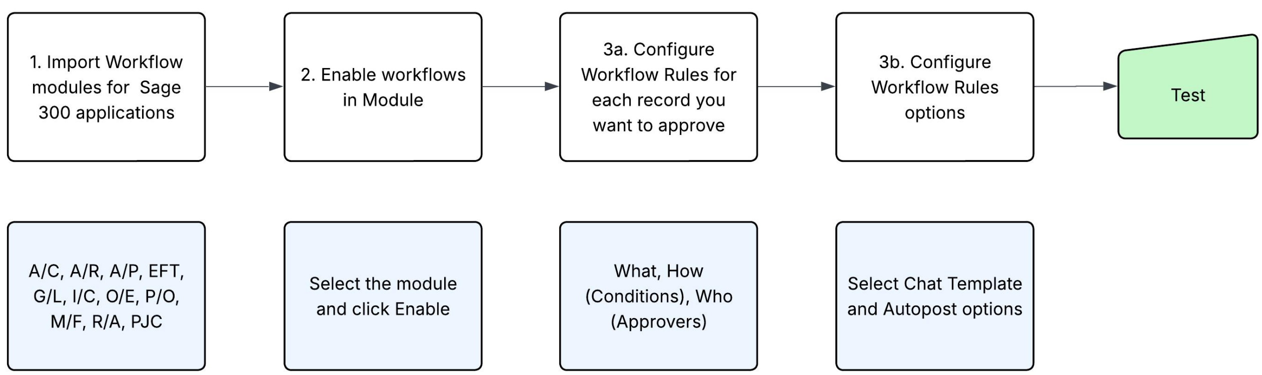
BEFORE YOU START

Refer to the **Installing TeamWork guide** for details.

You install and activate Sage 300 modules (AC Chat, Extender and Information Manager). You setup A/C Chat, Extender and TeamWork.

You can then import TeamWork workflow modules and configure the workflow rules (What, How, Who) in Extender.

Enable TeamWork Workflows



STEP 1. IMPORT WORKFLOW MODULES IN EXTENDER

TeamWork includes workflow templates for many Sage 300 processes. You import the modules for the Sage 300 applications and records that apply to your business.

- Batches (G/L journals, A/P Invoices, A/P Payments, A/R Invoices)
- Transaction headers (Sales Orders, Purchase Orders, I/C Transactions, RMA, A/C Chat leave requests, A/C Chat Expense claims, A/C Chat Time records)
- Master files (New customer, new vendor, new item, change of fields, EFT Vendors and EFT Customers)

Example: If you want to approve Purchase Requisitions, Purchase Orders and General Ledger batches, you need to import the POWorkflow and GLWorkflow modules.

STEP 2. ENABLE WORKFLOW

You can enable all workflows in the module using the Enable button or you can choose to enable only certain workflows.

For details, refer to Enable TeamWork Modules on the next page

Example: If you want to approve Purchase Requisitions only, you import the POWORKFLOW module and enable only the Purchase Requisition workflow on the View Workflows Tab. Other workflows can remain inactive.

STEP 3. CONFIGURE BUSINESS RULES

1. Add Workflow Rules (What, How, Who) conditions and approvers) for each record type you want to approve.
   a. See details and examples Extender Workflow Tutorials
   b. Amend message templates (if required).
2. Select approval options (TeamWork template and posting options)
3. Test and adjust workflow rules as required

Refer to details on workflow rules: Workflow Rules on page 29

Enable TeamWork Modules

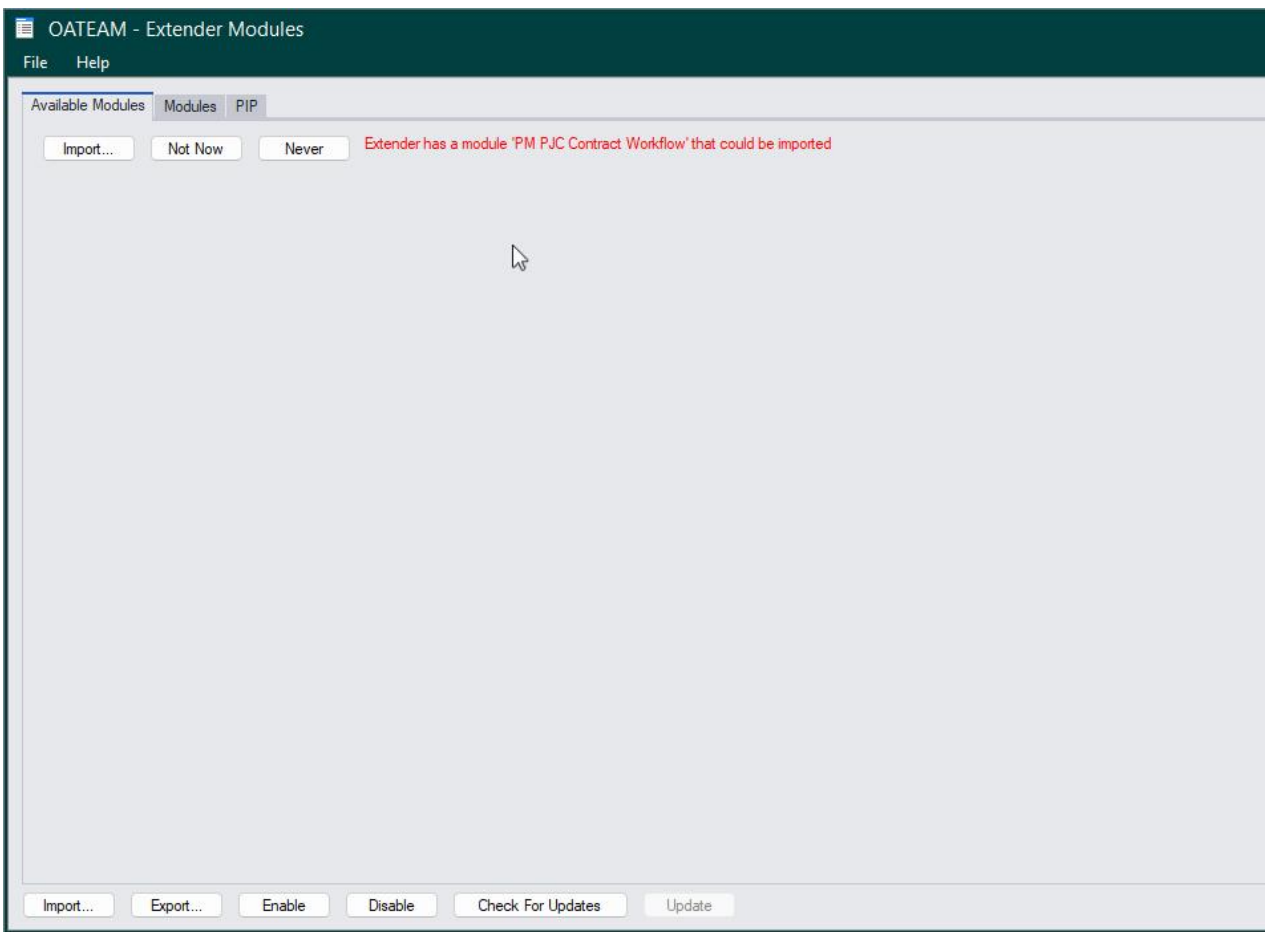
TeamWork includes Extender modules incorporating workflow for approvals and alerts for a range of Sage 300 applications. See list in What is included?

You use the Extender Modules screen to import the module for the Sage 300 application you want to approve.

AVAILABLE MODULES

In a new install, you see a list of available modules when you open the Extender Modules screen. The screen lists all the Extender modules included in Extender program files (in the VIxxA folder), that are not yet imported in the database.

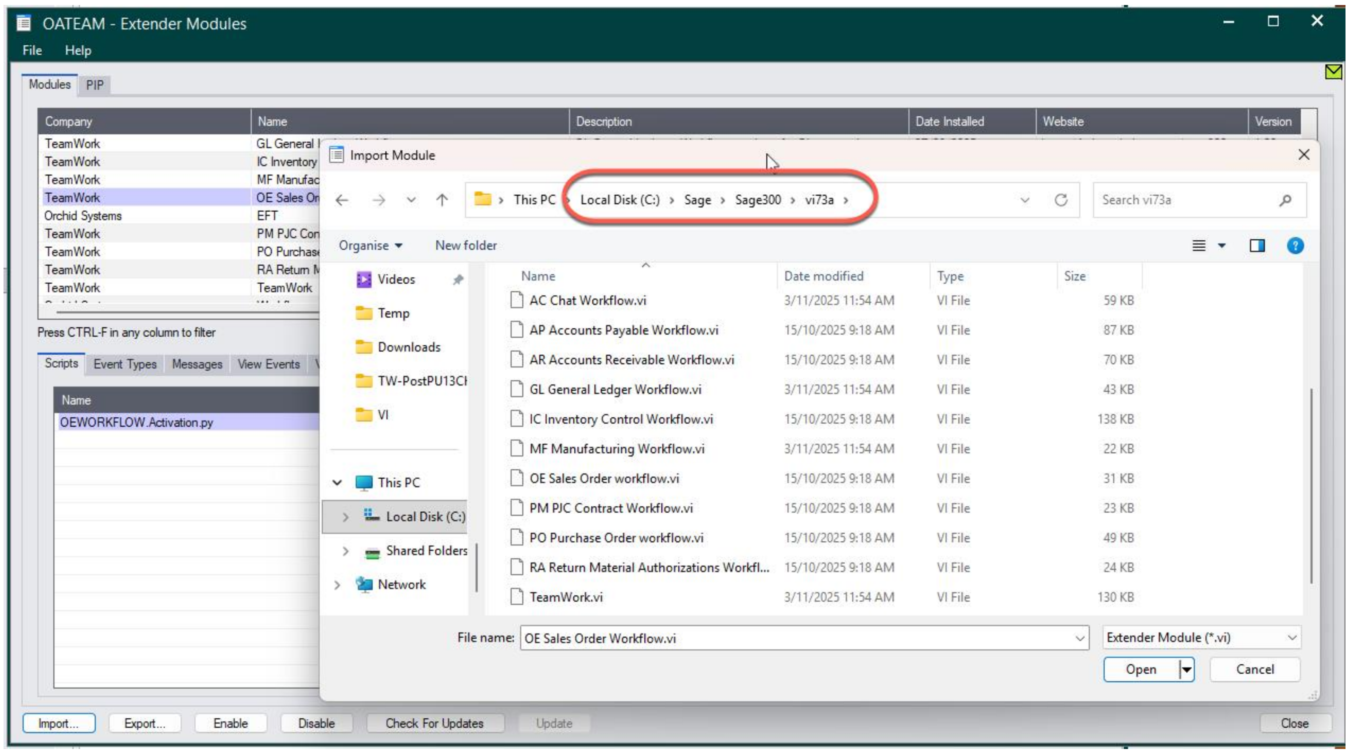
In the example below, the PM PJC Contract workflow is available in the VIxxA folder, and not yet imported in the database. You can use the **Import** button to import.



IMPORT MODULES

Use the `Import` button to import an Extender module from the VIxxA folder of your Sage 300 installation. You can also use modules saved on a network folder (e.g. AP Workflow approval.vi).

This will create and update all the components included in the module. It is recommended to restart the Sage desktop after importing a module.

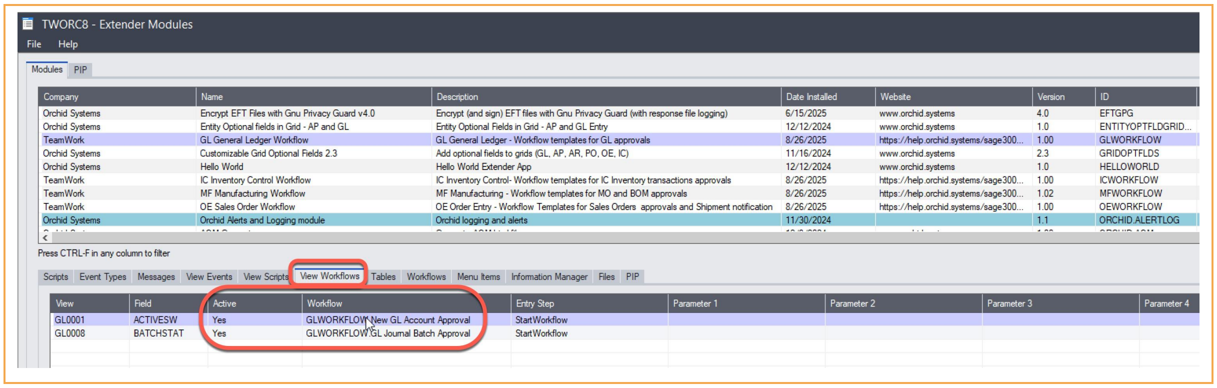


ENABLE/DISABLE

After importing the modules, you need to **`enable`** them for the configured workflow approvals and notifications to be active.

Use the **`Enable`** button to enable all workflow templates in the module.

> **Tips:**
> You can see a list of the workflow templates available in the **View Workflow** tab on the Extender Module.
>
> If you want to enable only one workflow template, use the **View Workflow Tab** to open the list and double click on `Yes` for the workflow you require.



CONFIGURE WORKFLOWS

Add Workflow Rules

In all cases, the workflow templates included in Extender and TeamWork require customers to configure Workflow Rules for the records they want to approve.

Setup Workflow Rules Options

On the Options Tab, select the TeamWork A/C Chat template and the Autopost options

Amend message templates

Message templates are used to send messages to the Chat when workflows start or progress.

Double-click on the Message Templates to open the email template, modify the details and save the records.

Workflow Rules

You use this screen to configure Workflow Rules to apply to the selected Workflow Templates and Sage 300 view.

Rules include What records are subject to workflow notifications and approvals, How to determine if approvals is required and Who approves. 1

TO USE THE SCREEN

Security Required

Users need to be in the "Configure Workflow Rules" security group to access this screen.

Update the default rules

When you import a workflow module included in Extender, Extender creates a default workflow rule for each workflow template and related view. The default rule sets `All` records to be approved by `ADMIN`.

- Use the Finder to select the rules you want to update.
- If you want all records to be approved, update the `Approvers` on the default rules.
- If you want only certain records to be approved, change the condition to meet your requirements.
- You can add new conditions in the required order.

See details below.

To create a new set of rules

Select a workflow template and a Sage 300 view.

You can only have one set of rules for each workflow template/Sage view combination.

In most cases, each workflow template is designed to work with only one Sage 300 view.

Examples:
- AR Customer Credit Limit approval and ARCUS view
- OE Sales Order Approval with OEORDH (O/E Order Header view)

WHAT DOES THE WORKFLOW APPLIES TO?

Insert a row for each rule, add a description and select a workflow color for the rule (optional).

1Rules include What records are subject to workflow notifications and approvals, How to determine if approvals is required and Who approves.

HOW DO YOU DETERMINE IF APPROVAL IS REQUIRED?

When does the rule apply?

Add the conditions used to determine if the rule applies.

The conditions can be based on various fields :

- Master file details and Optional Fields
- Batch Header fields, details from the first entry in the batch, including optional fields values applied to the first entry
- Header fields and details from the first line on the record, including optional fields.

Note: Conditions are cumulative.

For examples and details, see Workflow Rules: Conditions (How) setup

WHO APPROVES?

Requirement!
Users need to be added as a Workflow User in the Extender License screen before you can use them in the workflow rules.

Select up to five Sage 300 users or Extender Workflow Groups that will approve sequentially.

Tip: To enable parallel approvals, select User Groups

Tip: If there are no users on the screen, the workflow will be automatically completed. You can check the details in Extender Inquiries> Workflow Detail Log.

Excluding Entered by

Select `Excluding Entered by` means that the user who started the workflow or created the record cannot approve. It doesn't mean to skip that level.

It is designed when using groups of approvers.

Example:
If the **Approver** is `Finance user group`, and Anne is a member of Finance, she can't approve a purchase order (PO) submitted by Anne, but she can approve another PO submitted by another user. POs submitted by Anne need to be approved by another user in the Finance group.

> **Tip:**
> If you use Excluding Entered by when selecting an individual user as the approver, you need to ensure that the user doesn't create the record, or have another rule before to assign such records to a different user.
>
> If user Anne created the PO, she can’t approve, even if she is assigned as the approver.
>
> You may end up in a situation where the workflow template cannot assign the workflow.

Approvers for notifications only workflow templates

If the Workflow Templates are designed to notify (and not a full approval process), select only one user or user group, as there is no way to progress to level 2.

> **Tip:**
> If you select a workflow user group, all users in the group will be notified.

OPTIONS TAB

On the **Options** Tab, configure the general notification options.

Per workflow rule, you can choose to send email messages and A/C Chat messages when the workflow starts and progresses.

Send A/C Chat message: if using TeamWork, select `Yes` and a `A/C Chat template` to enable notifications in A/C Chat

> **Note:** The `EvaluateConditions` workflow action sets a workflow value SENDACCHAT that you can use in the workflow templates when creating your own templates.

> **Note:** Send A/C Chat message is only displayed if A/C Chat is activated in the database.

> **Note:** You can only send A/C Chat messages if the workflow rule applies to a Sage 300 record with a link type in A/C Chat. See list of available templates: What is included?

Send Email Messages: Select `Yes` to enable email messages in the standard workflow templates.

> **Note:** The `EvaluateConditions` workflow action sets a workflow value SENDEMAIL that you can use in the workflow templates when creating your own templates.

Report and **Output folder and file name**

Select a report to be printed when the workflow starts and is approved.

> **Note:** This is used in some workflow templates in conjunction with the `PrintReport` workflow action.

Workflow Administrator

Select a Workflow Administrator user. This user should be configured as a Workflow User.

When is this user used?

Extender can validate that the same user cannot approve more than one when multi-level is enabled. This lets you enable Parallel approvals by selecting Workflow User Groups as the approvers in the workflow rules.

When the `CheckThisApproverCanApprove` workflow action cannot assign the workflow to the next approver configured in the workflow rules (for example, the user has already approved the workflow in a prior level), Extender uses the user configured as the Workflow Administrator.

When you select **Excluding Entered By** for an approver in the workflow rules (Approvers section), the `CheckThisApproverCanApprove` workflow action can also use the Workflow Administrator.

> **Note:** When the workflow Administrator is not configured or is not a workflow user, the workflow remains in the workflow console, but is unassigned. Only users with **Modify All Workflows** security rights in Extender Sage 300 Administrative Services

Substitution and escalation

In this release, there are no out of the box functionality for automatic substitution or escalations of workflow.

You can reassign workflow to other users if you have rights to Modify all workflow" in Sage security in Admin services.

You can also assign workflow to groups and any users in the group can approve, depending on availability, thus reducing potential delays in approving.

TeamWork Workflow Tutorials

TeamWork includes configurable Workflow Templates for a range of Sage 300 records, core modules and third-party modules developed in the Sage 300 SDK.

- Batches (G/L journals, A/P Invoices, A/R Invoices)
- Transactions headers (Sales Orders, Purchase Orders, I/C Transactions)
- Master files (New customer, new vendor, new item, change of fields)

Tip: For key steps to install and configure A/C Chat and Extender to activate TeamWork, refer to How to Install TeamWork on page 6

Examples:

Below are detailed examples to configure approval workflows for:

New AR Customer Approval

A/P Invoice Batch Approval

Purchase Order Approval on page 67

G/L Journal Batch Approval

Approving General Ledger (G/L) Journal batches ensures G/L Journal batches are reviewed and authorized before posting to the General Ledger, controlling transactions.

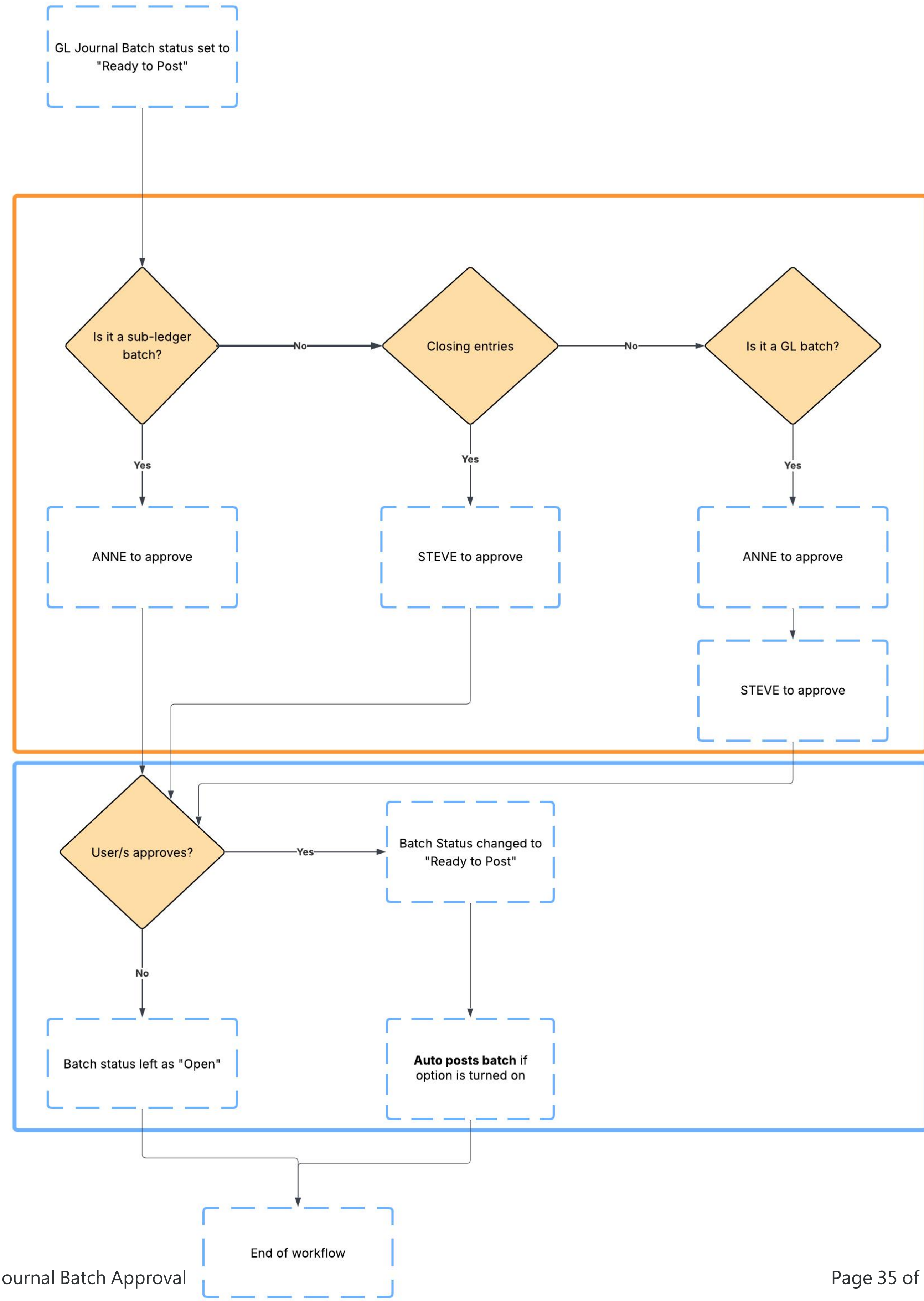
> **Note:** The process described below is similar for other batches in Sage 300.

WHAT IS G/L JOURNAL BATCH WORKFLOW TEMPLATE?

When a user requests the `Ready to post` status (or posts the G/L Batch), the workflow evaluates the Workflow Rules. If no approval is required, the workflow auto-completes. If the batch requires one or more approvals, the batch cannot be posted until all users have approved.

- When all users have approved, the batch is set to `Ready to Post`, and if the auto-post option is enabled in the workflow rules, the batch is posted in the final approval step.
- When one user rejects, the workflow completes and the batch remains open.
- Users need to adjust and start the approval process again by submitting the batch for `Ready to post`.

An example is described in the flowchart below.


GL Journal Batch status set to "Ready to Post"
Is it a sub-ledger batch?
No
Closing entries
No
Is it a GL batch?
Yes
Yes
Yes
ANNE to approve
STEVE to approve
ANNE to approve
STEVE to approve
User/s approves?
Yes
Batch Status changed to "Ready to Post"
No
Batch status left as "Open"
Auto posts batch if option is turned on
End of workflow

HOW TO SETUP G/L JOURNAL BATCH APPROVAL?

You need to import the Extender Module and configure the Workflow Rules.

Before you start

Step 1: Import Extender Module

Import the GLWORKFLOW.GL General Ledger Workflow module in Extender Setup > Modules. This imports the workflow templates and related message templates for Sage 300 General Ledger.

Step 2: Enable the workflow using the `Enable` button on the Module screen.

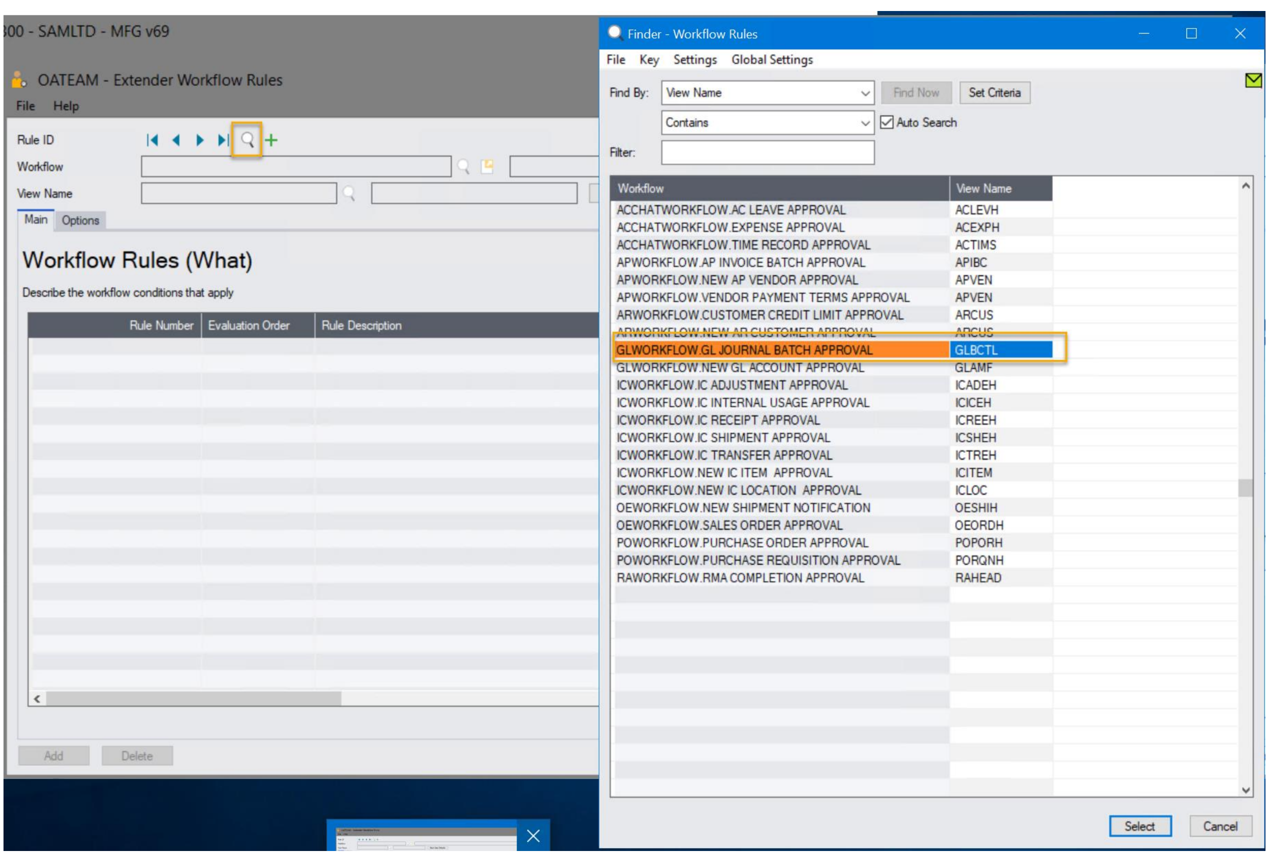
Step 3: If using TeamWork, add A/C Chat templates for G/L Journal Batch.

See Details In How To Install TeamWork On Page 6

Configure Workflow Rules

In Extender Setup > Workflow Rules,

Step 1: Search for your required workflow template.



Step 2: Add the view name – GLBTCL for G/L Journal batch approval

Step 3: On the Main Tab, create workflow rules:

Workflow Trigger: When the batch status meets the defined conditions (e.g., "Ready to Post" and total amount exceeds a threshold), the G/L Journal Batch Approval workflow triggers.

For each rule:

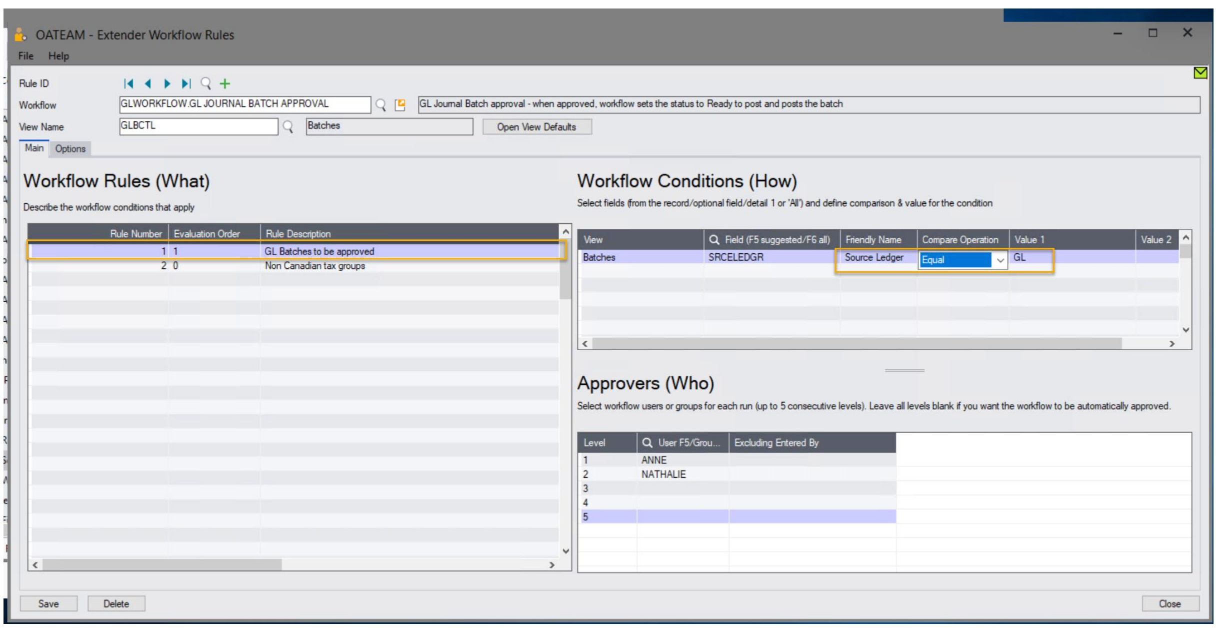
- Add the conditions using fields on the G/L Journal Batch, or fields on the first entry in the batch.
- Add the approver(s): Up to 5 approvers, they can be workflow users or workflow user groups.

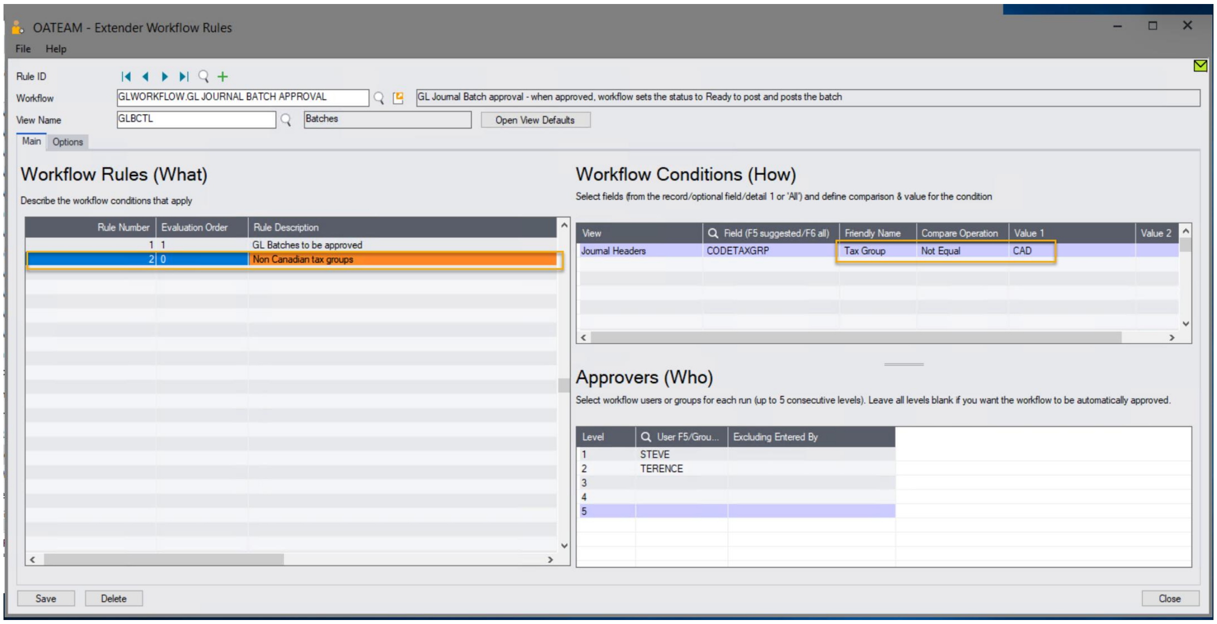
Tip: If you leave the approvers blank, the workflow will auto-complete.

Example:
Scenario -

Rule 1 = All non GL Journal batches need to be approved by Anne and Nathalie. (e.g. AP,AR, IC batches)

Rule 2 = All GL Journal batches to be approved by Steve and Terence.

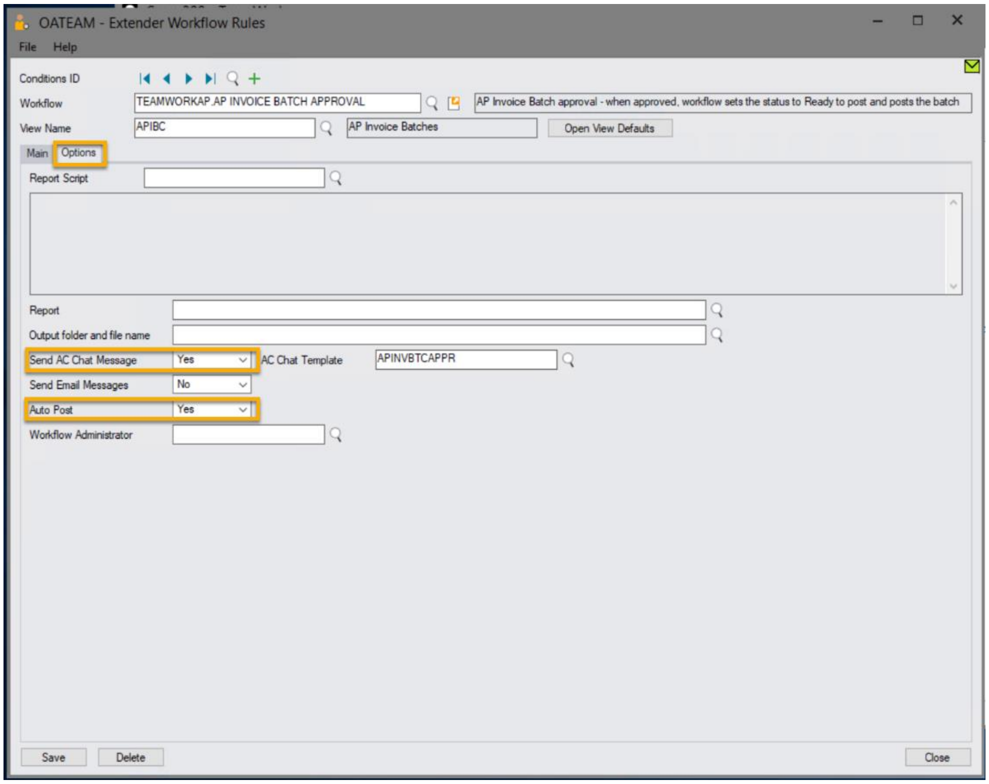




Step 4: On the Options Tab:

1. To use TeamWork approvals when A/C Chat is activated, Select `Yes` for the **Send AC Chat message** and select the `AC Chat template` linked to G/L Journal Batches.
2. Select **Autopost** option:

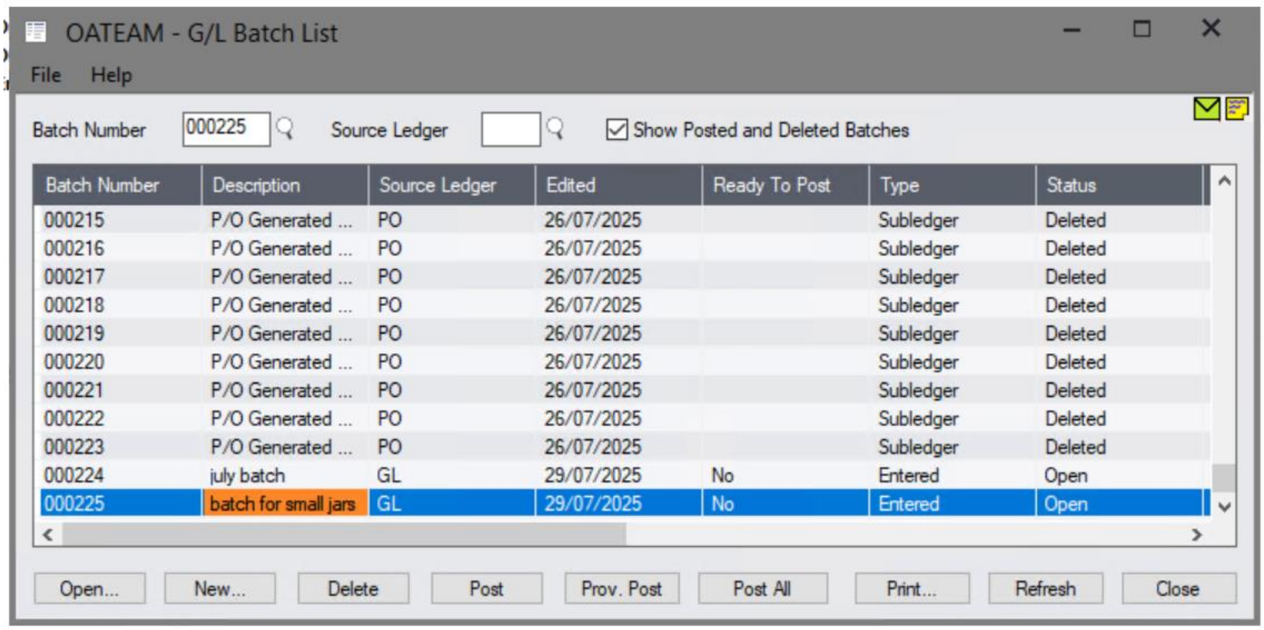
- `Yes` if you want to post the batch automatically when the last user approves the batch.
- `No` if you want the Approval to make the batch "ready to post", but not post it. Another user (e.g. the user who started the batch can post the batch when they are notified the batch is approved).


OATEAM - Extender Workflow Rules
File Help
Conditions ID
Workflow
TEAMWORKAP.AP INVOICE BATCH APPROVAL
AP Invoice Batch approval - when approved, workflow sets the status to Ready to post and posts the batch
View Name
APIBC
AP Invoice Batches
Open View Defaults
Main
Options
Report Script
Report
Output folder and file name
Send AC Chat Message
Yes
AC Chat Template
APINVBTCAPPR
Send Email Messages
No
Auto Post
Yes
Workflow Administrator
Save
Delete
Close

Using the GL Journal Batch approval workflow

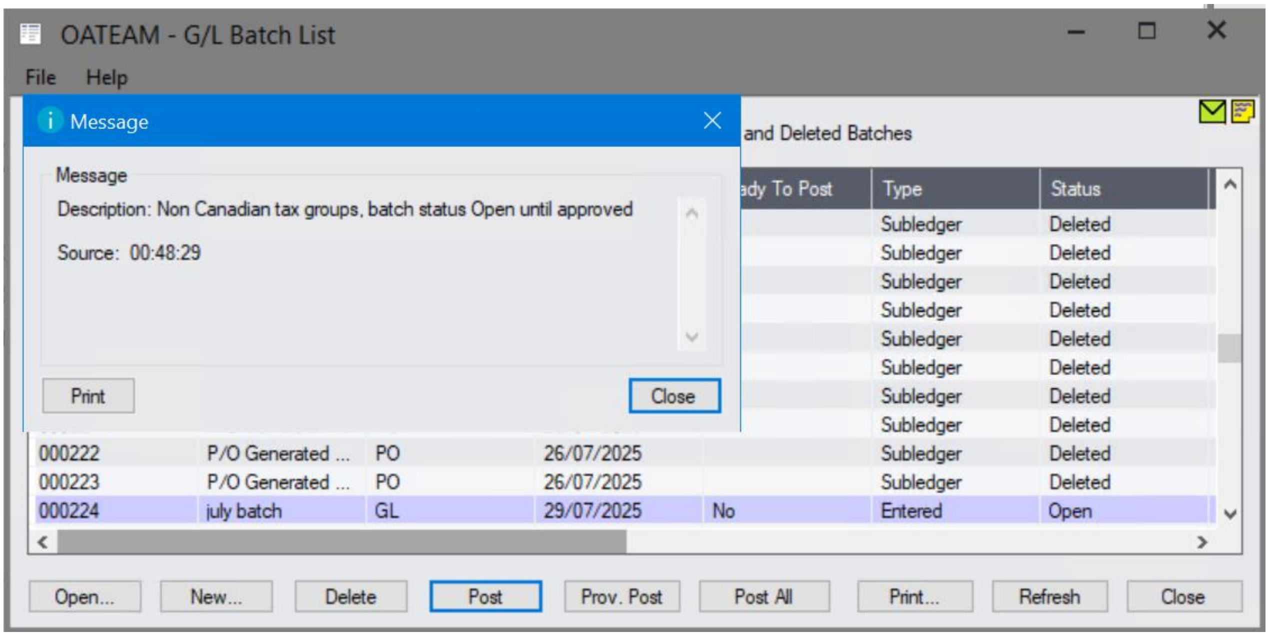
SUBMIT THE BATCH FOR POSTING

Step 1: Batch creation/entry: G/L staff creates and saves an G/L Journal Batch (e.g., entering vendor Journals). When they are ready, they make the batch Ready to Post or use the Post button.

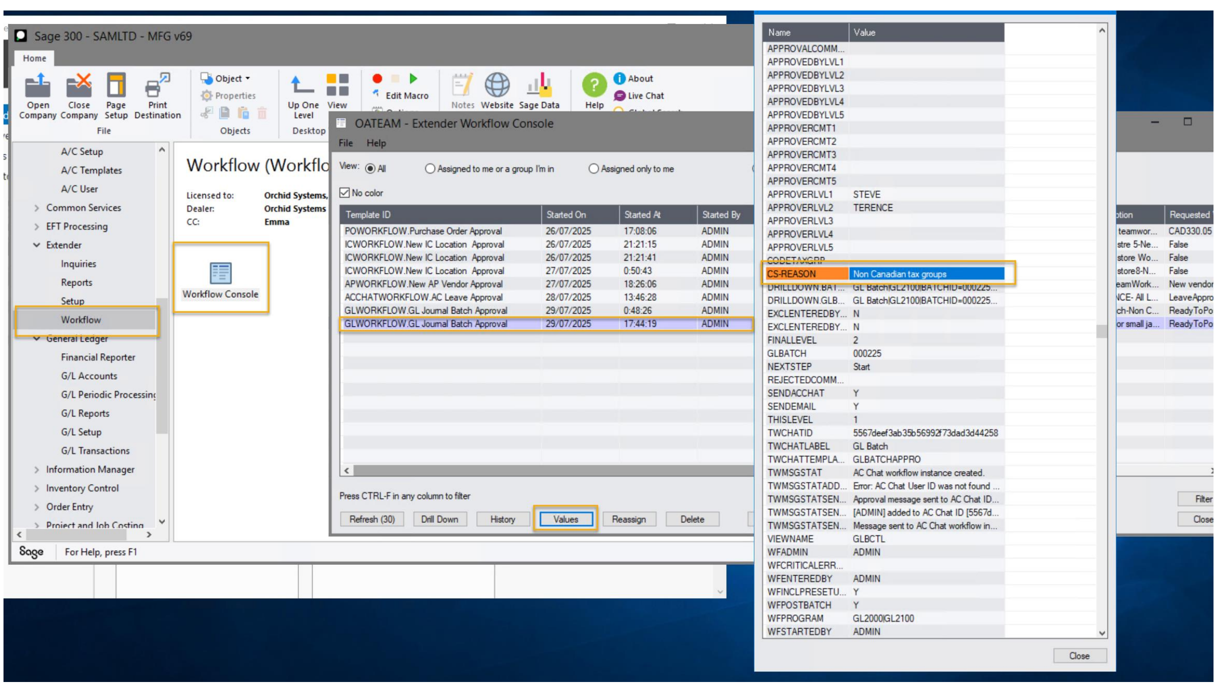


Step 2: Extender Workflow starts and evaluates the Workflow Rules.

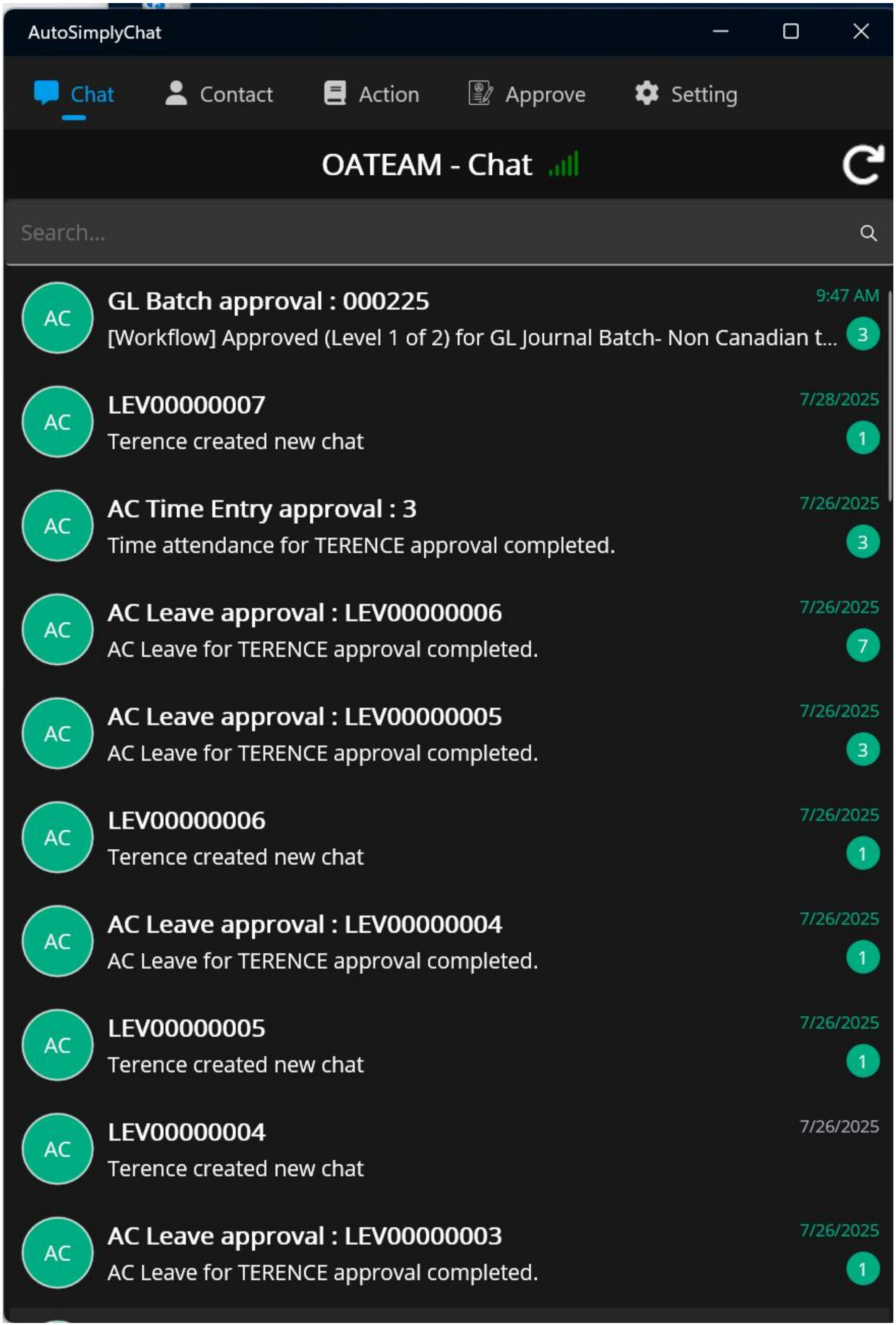
Step 3: Approval Request: The system sends an approval request to the assigned approver(s) (e.g., department manager, finance controller). You will see this notification if the batch requires approval.

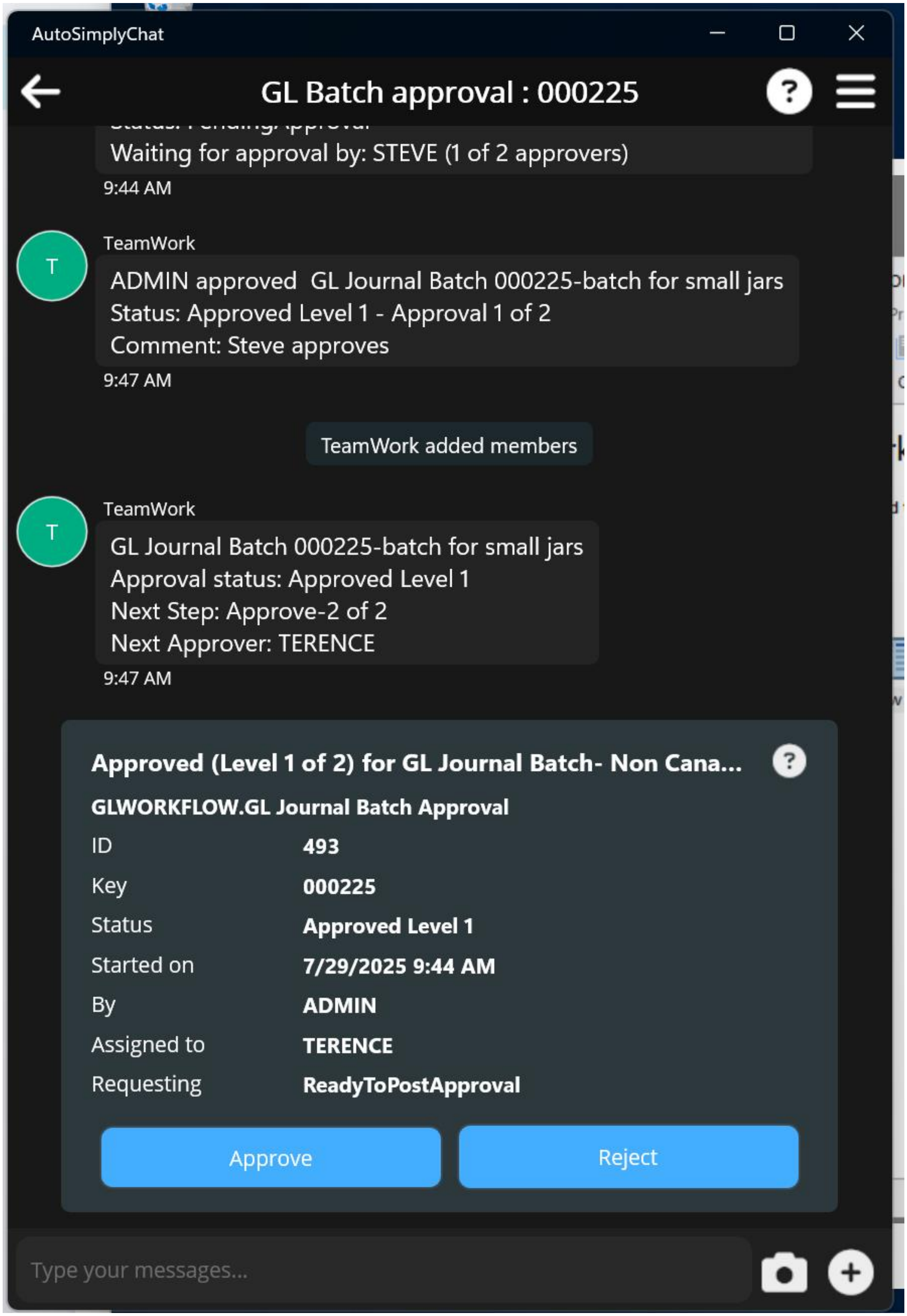


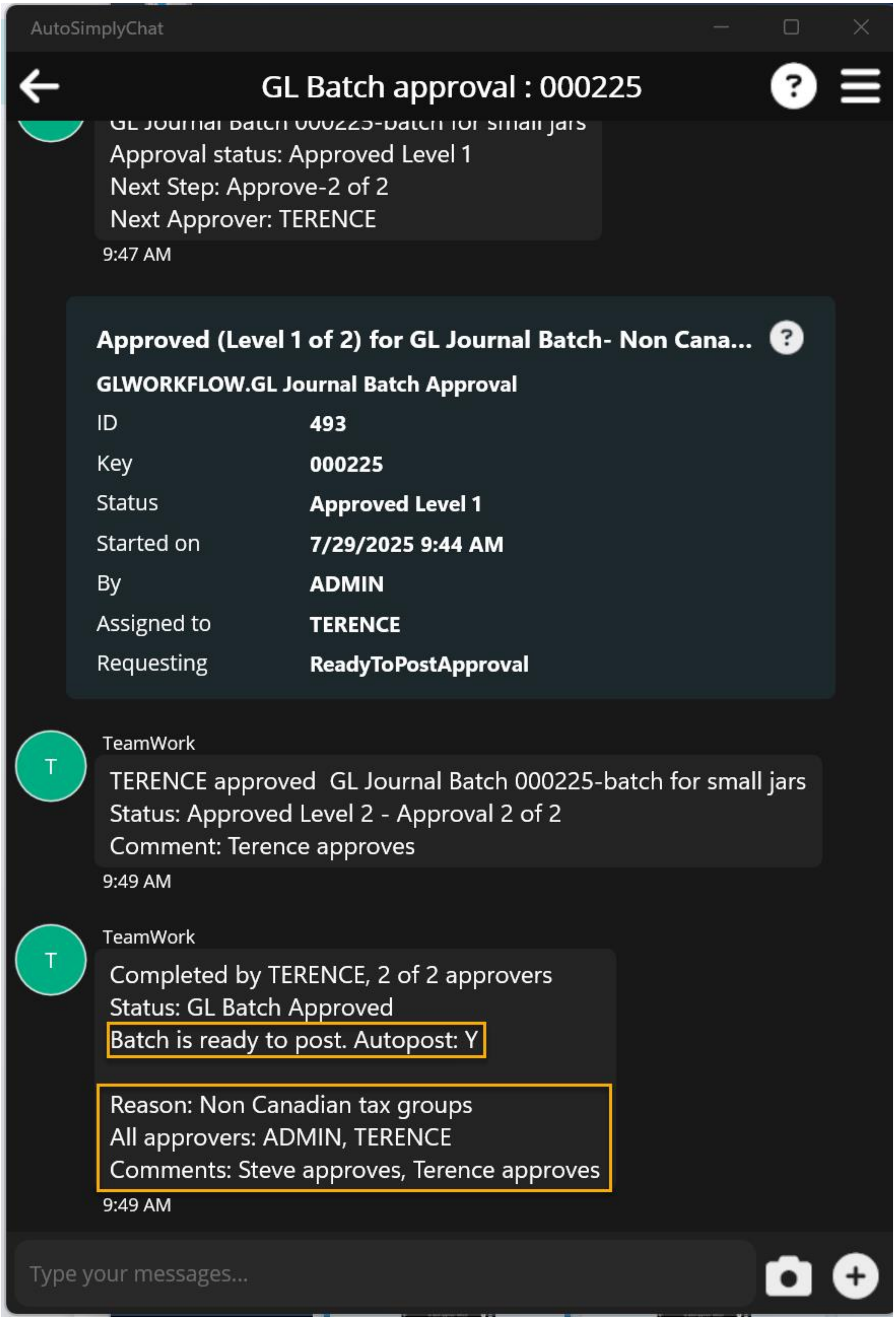
Step 4: **Review and action**: Approver reviews the batch details, verifying accuracy and compliance, then approves or rejects on the workflow console, or in A/C Chat. You can select up to 5 levels of approval.



Approval on the workflow console ^


AutoSimplyChat
Chat
Contact
Action
Approve
Setting
OATEAM - Chat
Search...
AC
GL Batch approval : 000225
9:47 AM
[Workflow] Approved (Level 1 of 2) for GL Journal Batch- Non Canadian t...
3
AC
LEV00000007
7/28/2025
Terence created new chat
1
AC
AC Time Entry approval : 3
7/26/2025
Time attendance for TERENCE approval completed.
3
AC
AC Leave approval : LEV00000006
7/26/2025
AC Leave for TERENCE approval completed.
7
AC
AC Leave approval : LEV00000005
7/26/2025
AC Leave for TERENCE approval completed.
3
AC
LEV00000006
7/26/2025
Terence created new chat
1
AC
AC Leave approval : LEV00000004
7/26/2025
AC Leave for TERENCE approval completed.
1
AC
LEV00000005
7/26/2025
Terence created new chat
1
AC
LEV00000004
7/26/2025
Terence created new chat
AC
AC Leave approval : LEV00000003
7/26/2025
AC Leave for TERENCE approval completed.
1

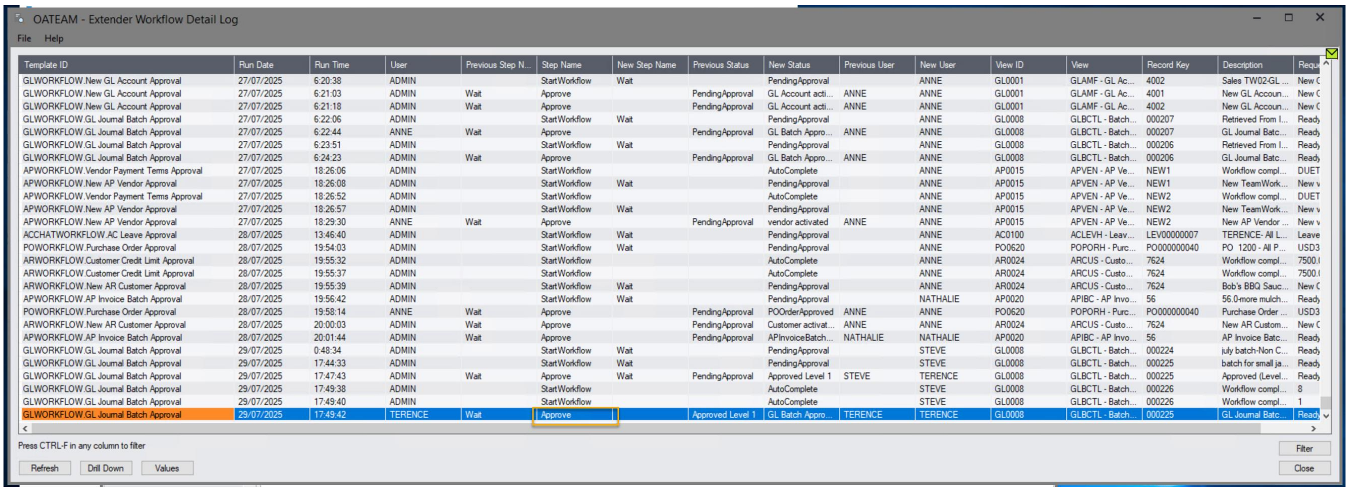

AutoSimplyChat
GL Batch approval : 000225
Waiting for approval by: STEVE (1 of 2 approvers)
9:44 AM
TeamWork
ADMIN approved GL Journal Batch 000225-batch for small jars
Status: Approved Level 1 - Approval 1 of 2
Comment: Steve approves
9:47 AM
TeamWork added members
TeamWork
GL Journal Batch 000225-batch for small jars
Approval status: Approved Level 1
Next Step: Approve-2 of 2
Next Approver: TERENCE
9:47 AM
Approved (Level 1 of 2) for GL Journal Batch- Non Cana...
GLWORKFLOW.GL Journal Batch Approval
ID 493
Key 000225
Status Approved Level 1
Started on 7/29/2025 9:44 AM
By ADMIN
Assigned to TERENCE
Requesting ReadyToPostApproval
Approve
Reject
Type your messages...


AutoSimplyChat
GL Batch approval : 000225
GL Journal Batch 000225-batch for small jars
Approval status: Approved Level 1
Next Step: Approve-2 of 2
Next Approver: TERENCE
9:47 AM
Approved (Level 1 of 2) for GL Journal Batch- Non Cana...
GLWORKFLOW.GL Journal Batch Approval
ID 493
Key 000225
Status Approved Level 1
Started on 7/29/2025 9:44 AM
By ADMIN
Assigned to TERENCE
Requesting ReadyToPostApproval
TeamWork
TERENCE approved GL Journal Batch 000225-batch for small jars
Status: Approved Level 2 - Approval 2 of 2
Comment: Terence approves
9:49 AM
TeamWork
Completed by TERENCE, 2 of 2 approvers
Status: GL Batch Approved
Batch is ready to post. Autopost: Y
Reason: Non Canadian tax groups
All approvers: ADMIN, TERENCE
Comments: Steve approves, Terence approves
9:49 AM
Type your messages...

Approval in AC Chat, including chats about the batch^

Step 5: Workflow Completion:

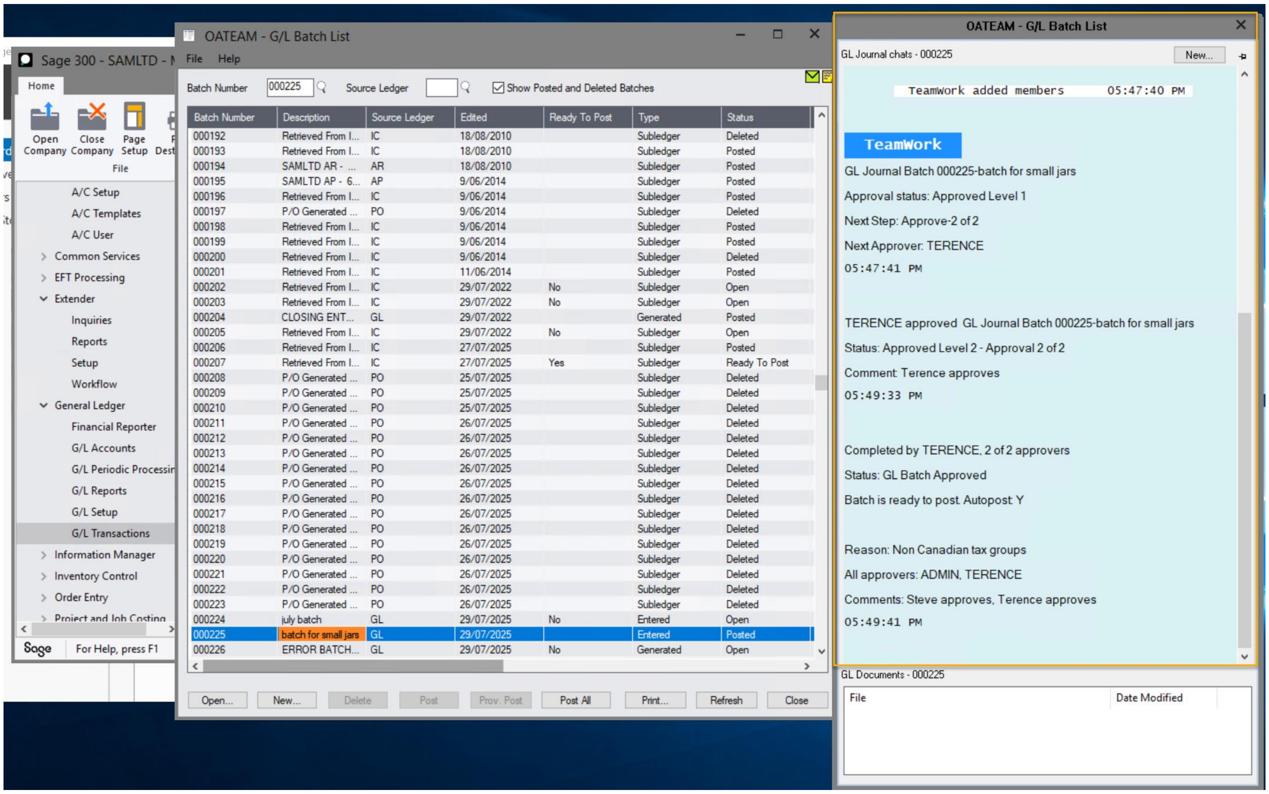
- **Approved**: when all approvers have approved (up to 5), the batch status is set to "**ready to post**".
- If the **Autopost** option is set to `Yes` in the workflow rules, when the last approve approves the batch, the workflow `Posts the batch`. The batch status is then `Posted`.
- If the **Autopost** option is set to `No` in the workflow rules, the batch status updates to "Ready to Post" on the G/L Journal batch list and the users can post the batch.



- **Rejected**: The batch status remains **Open** . Notifications and workflow history logs indicate rejection, and the batch is returned for correction or deletion.

VIEWING CHAT AND STATUS

When TeamWork is enabled, users can view the chat messages and the workflow approval status, using the Notes tray configured for the A/P Invoice Batch screen (using the Sage 300 desktop screen).



Workflow history and audit logs

Extender logs all workflow steps: Use the Workflow Inquiries > Workflow Detail log to view the approvers and their comments. The Workflow Detail log also includes auto-completed workflow for audit purposes.

Workflow Inquiries and Reports

TeamWork users can use A/C Chat Inquiries to view all chats related to the approvals.

O/E Sales Order Approval

Sales Orders (O/E Order Entry) are reviewed and authorized by management based on criteria like amount, vendor, or item before being issued to suppliers.

If the Order's properties (e.g., total amount, department, specific items) meet one of the defined conditions, the Sales Order Approval workflow triggers.

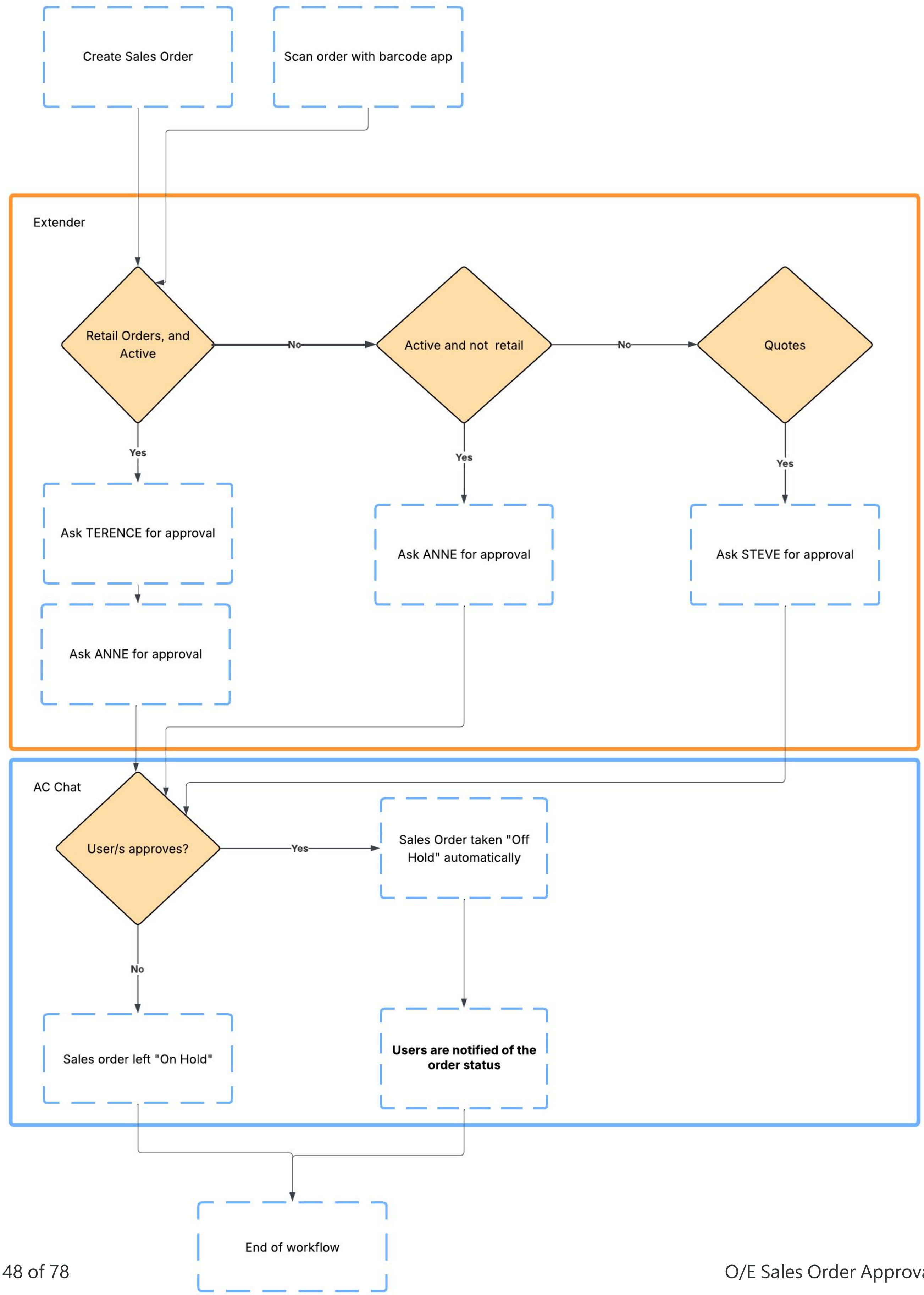
> **Note:** The process described below is similar for other transaction records in Sage 300, such as Purchase Requisitions and O/E Sales Order.

WHAT IS SALES ORDER APPROVAL?

When a user posts a Sales Order , the workflow evaluates the Workflow Rules. If no approval is required, the workflow auto-completes. If the O/E requires one or more approvals, the O/E remains on hold until all users have approved.

- When all users have approved, the O/E is released, set off hold and the form can be saved as a PDF in the configured folder.
- When one user rejects, the workflow completes and the O/E remains on hold.
- Users need to adjust and start the approval process again by taking the O/E off hold.

*Note the below diagram is an example of a process flow, but will be a different example in the instructions/tutorial for Sales Order Approval.


Create Sales Order
Scan order with barcode app
Extender
Retail Orders, and Active
No
Active and not retail
No
Quotes
Yes
Yes
Yes
Ask TERENCE for approval
Ask ANNE for approval
Ask STEVE for approval
Ask ANNE for approval
AC Chat
User/s approves?
Yes
Sales Order taken "Off Hold" automatically
No
Sales order left "On Hold"
Users are notified of the order status
End of workflow

HOW TO SET UP SALES ORDER APPROVAL?

You need to import the Extender Module and configure the Workflow Rules.

Before you start

Step 1: Import Extender Module

Import and enable the **OEWORKFLOW.Sales Order Workflow** module in Extender Setup > Modules. This imports the workflow templates and related message templates for Sage 300 Sales Order .

Step 2: Add a A/C Chat template for O/E Sales Order . Include preset users if required.

See Details In How To Install TeamWork On Page 6

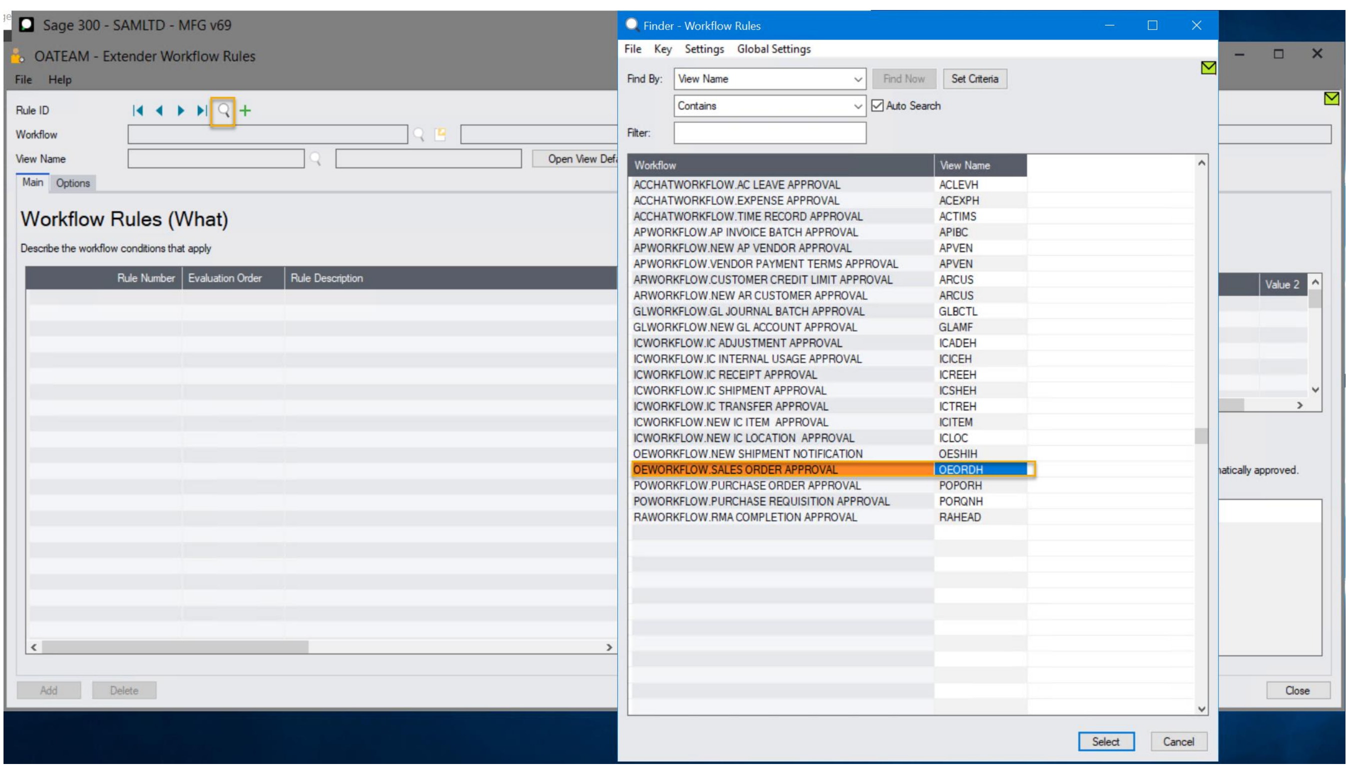
Setting up workflow rules:

Rules can be based on any combination of fields on the Sales Order , Sales Order optional fields (header) and the first line of the Sales Order .

In the example below, the rules are based on the O/E Total Amount and the Customer's country.

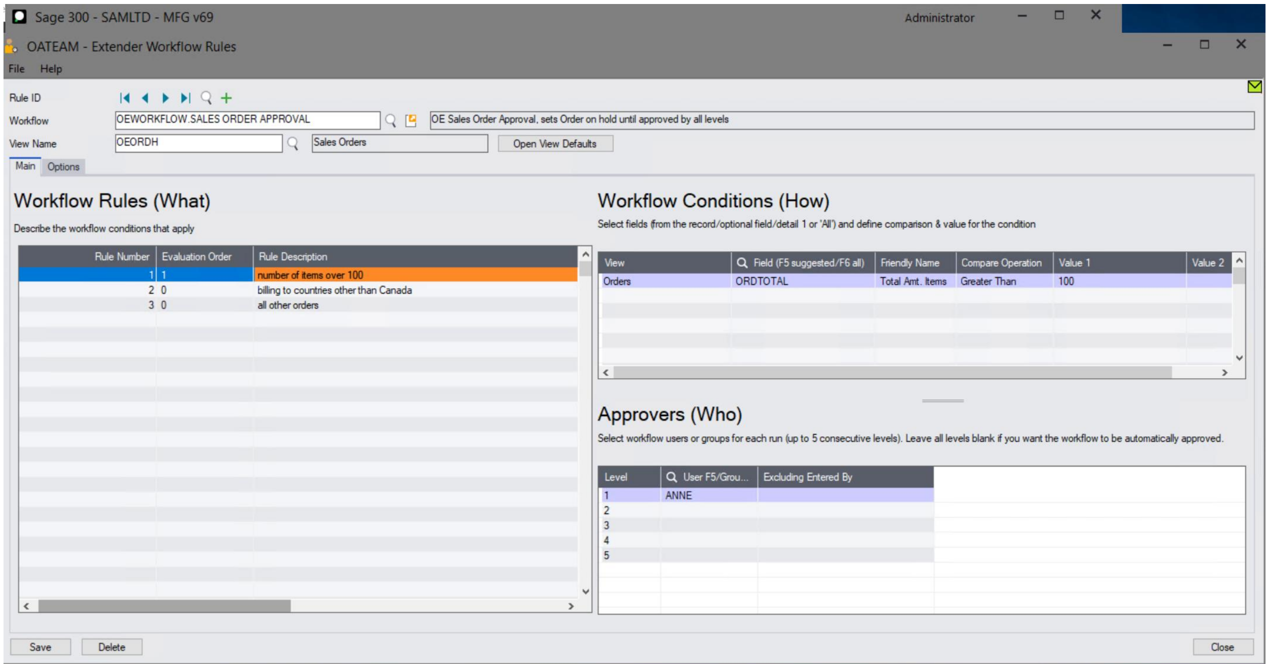
In Extender Setup > Workflow Rules,

Step 1: Search for your required workflow template. Select `OEWORKFLOW.Sales Order Approval` and `OEORDH` as the View name.



Step 2: Set up Workflow Rules :

Rule 1: ORDTOTAL > 100, the approver is Anne

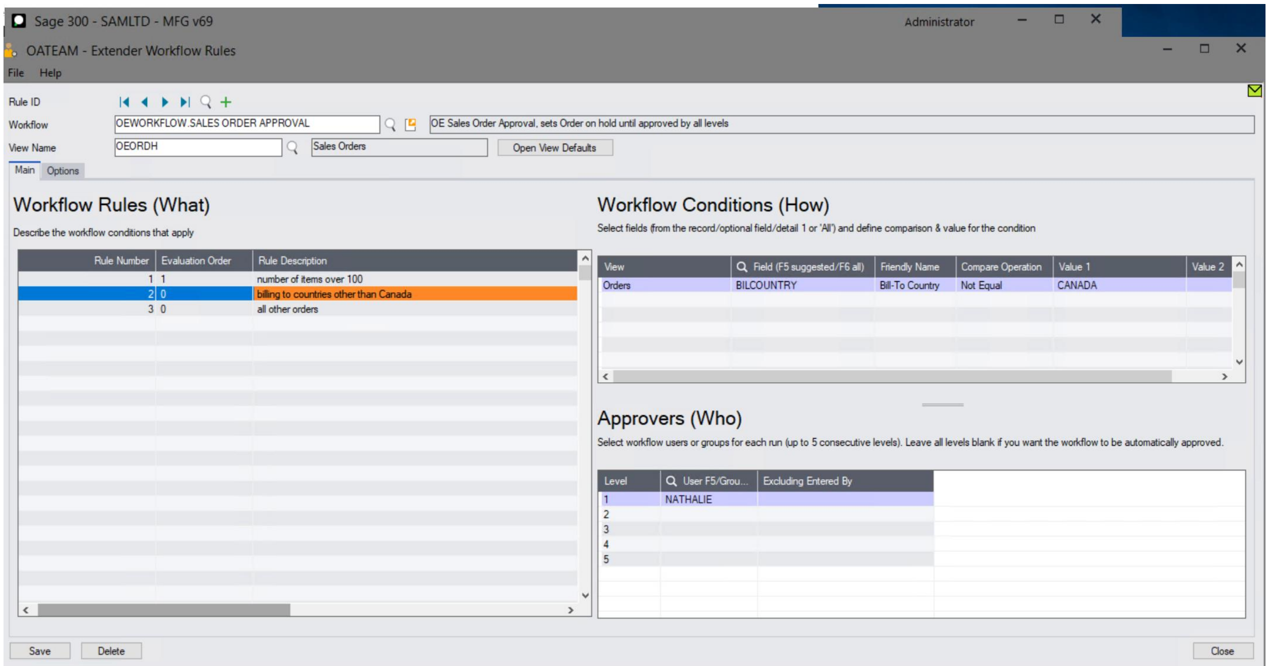


Rule 2: BILCOUNTRY it NOT equal to Canada, then Nathalie approves.

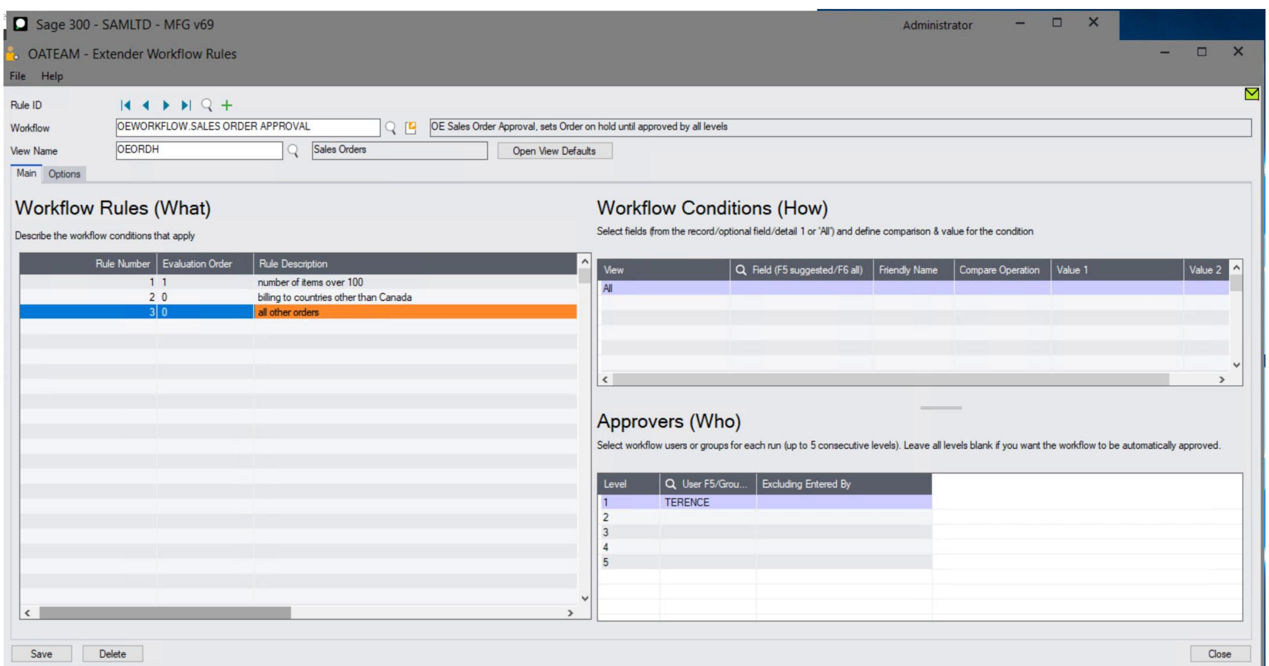
The list of countries is configured in a Sage 300 optional table for ease of maintenance.

For details, see Workflow Rules: Conditions (How) setup

Note: You could also use the IN compare operation, and list the countries in Value 1. This would work if you have a short list of countries, it isn't used in other rules or Sage 300 screens and it doesn't change often.



Rule 3: All other Sales Order s are approved by Terence.



Step 3: On the Options Tab, select the A/C chat template

Step 4: On the options Tab, select the PrintPurchaseOrder report if you want the workflow approval step to save the O/E as a PDF in the configured folder.

> **Note:** This requires to configure the folder and the Crystal report to use in the TeamWorkO/E configuration table.

Step 5: Save the workflow rules page to save your configuration of the workflow template.

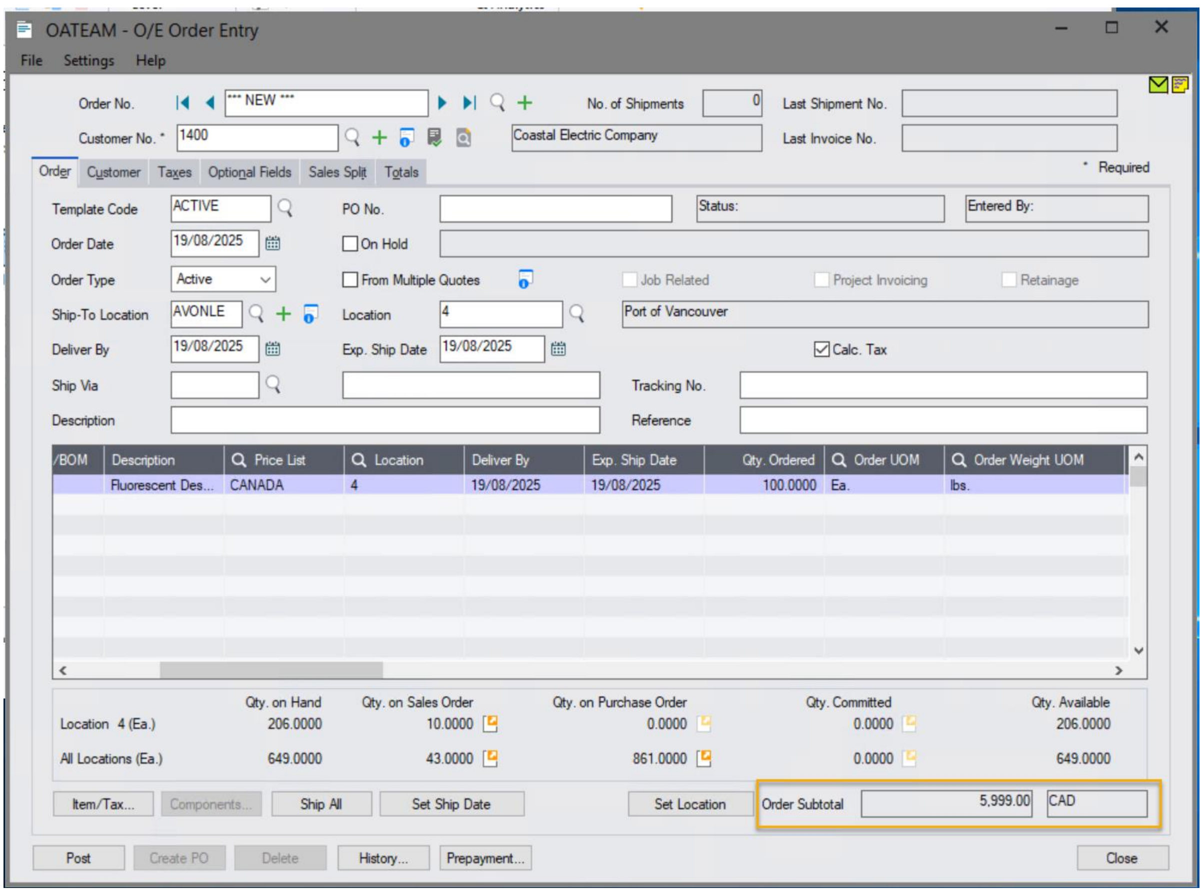
Using the Sales Order approval workflow

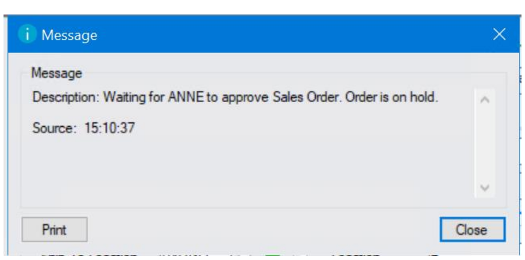
STARTING THE WORKFLOW

Step 1: Sales Order Creation:

A user creates and saves a new Sales Order with ORDERTOTAL over 100, and another with international billing (outside of Canada) in the system. T workflows are triggered. Sales Order is on hold. The system notifies the user of the workflow starting.

Users can only take the O/E off hold by approving the workflow. The screenshots below will demonstrate the situation with over 100 ORDERTOTAL.



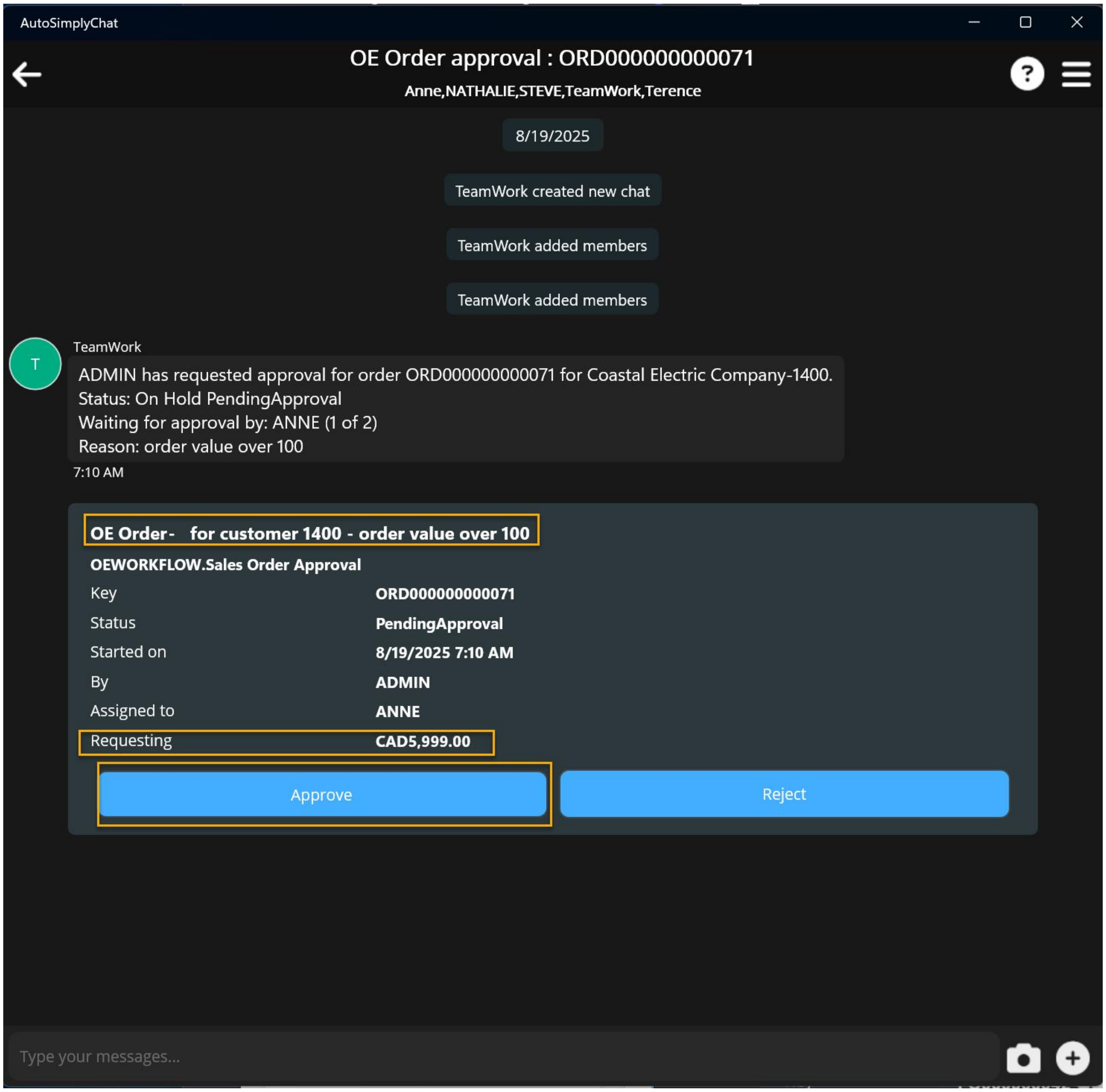


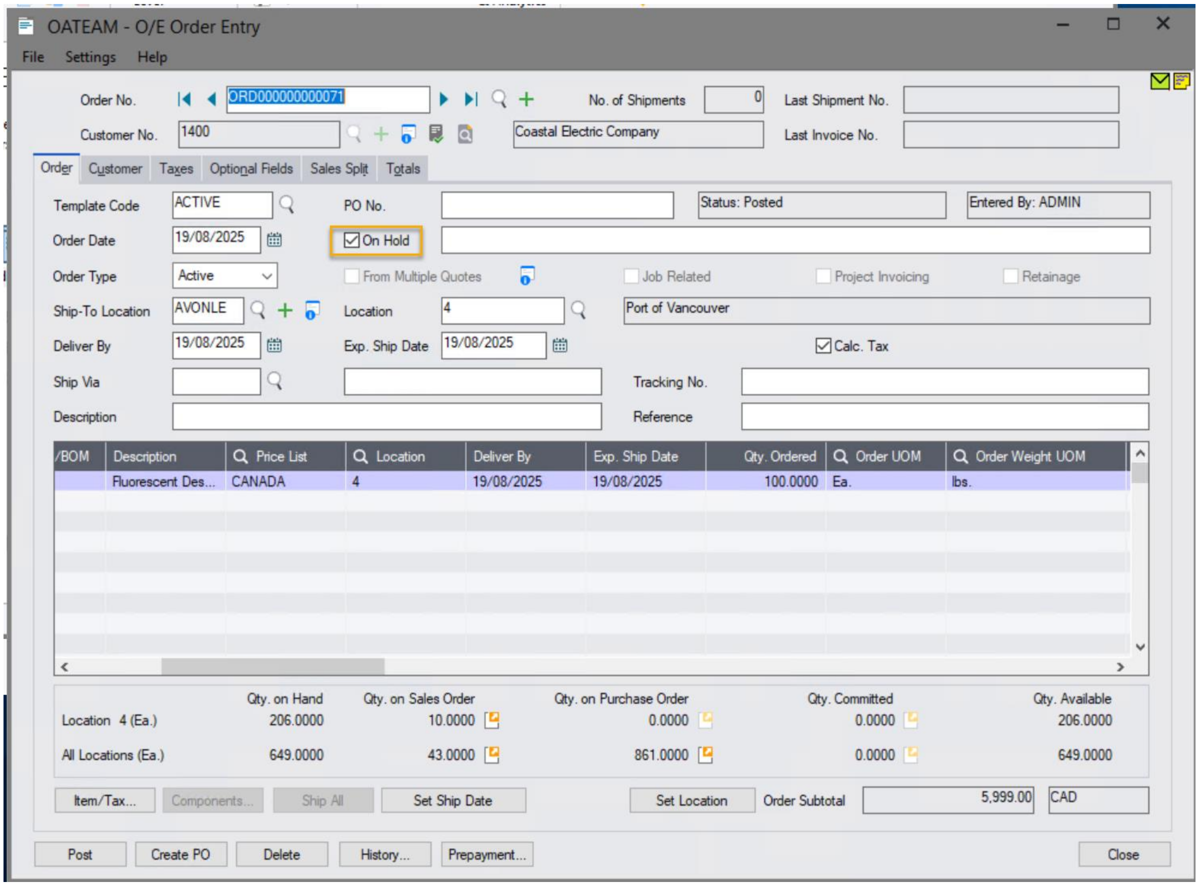
Step 2: `Approval Request`:

The workflow evaluates the conditions in the rules and sends an approval request to the assigned approver(s) (e.g., department head, procurement manager, finance).

Step 3: Review & Action

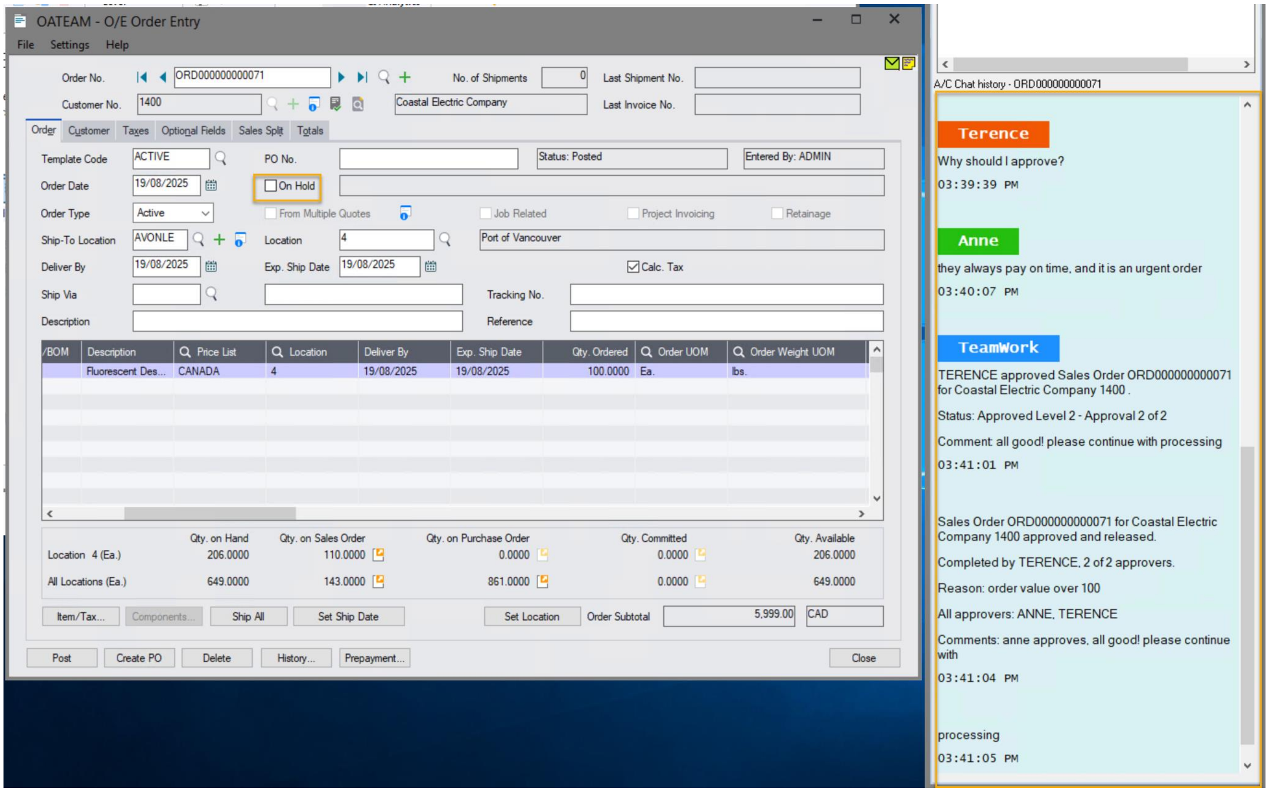
Approver reviews the O/E details, cost, and necessity, then approves or rejects. Approvers can approve in A/C Chat app (if using TeamWork) or in the Extender workflow console.





Step 4: Workflow Completion:

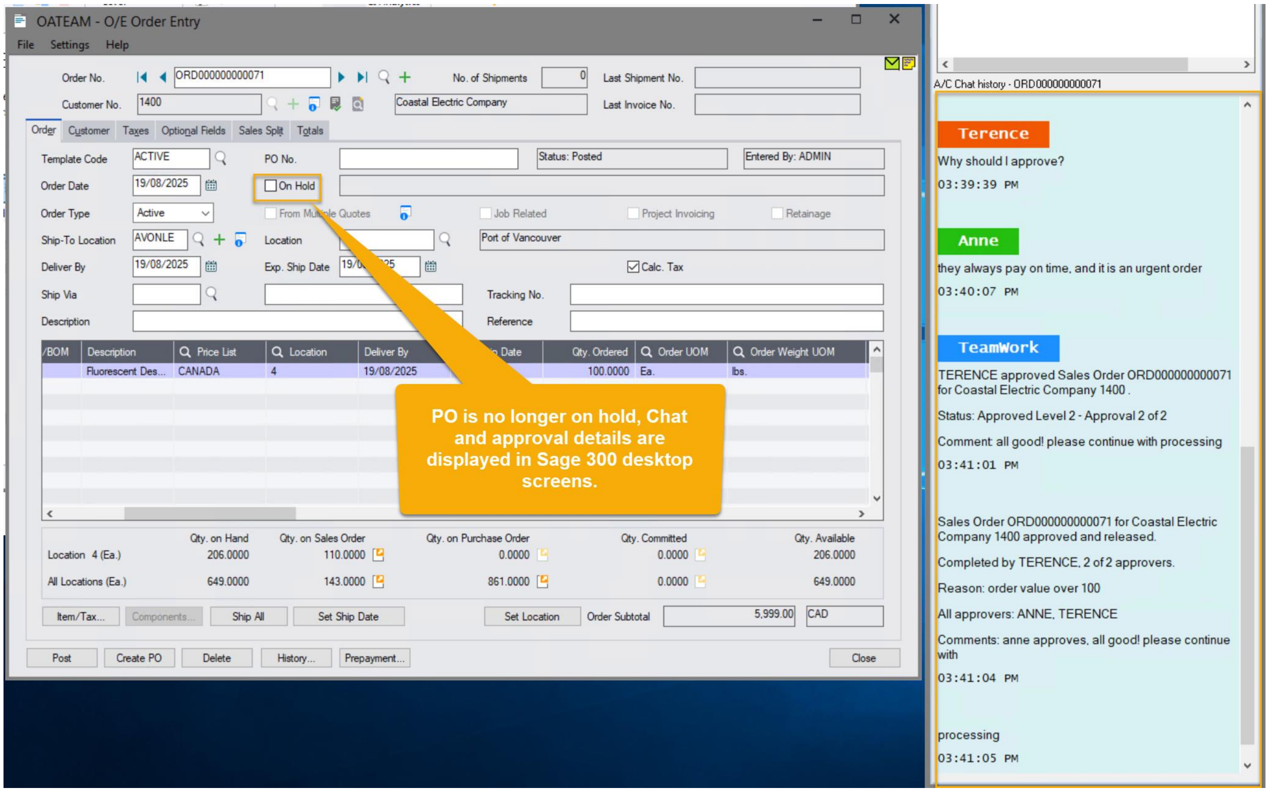
- Approved: The Sales Order 's status updates to allow issuing to the Off Hold, If the Print Report option is configured, the O/E PDF document is created.



- **Rejected**: As soon as one user rejects, the workflow completes. The Sales Order remains on hold , and it's returned for modification or cancellation. The workflow status indicates rejection.

VIEWING CHAT AND STATUS

When TeamWork is enabled, users can view the chat messages and the workflow approval status, using the Notes tray configured for the P/O Purchase Order screen (using the Sage 300 desktop screen).



Workflow history and audit logs

Extender logs all workflow steps: Use the Workflow Inquiries > Workflow Detail log to view the approvers and their comments. The Workflow Detail log also includes auto-completed workflow for audit purposes.

Workflow Inquiries and Reports

TeamWork users can use A/C Chat Inquiries to view all chats related to the approvals.

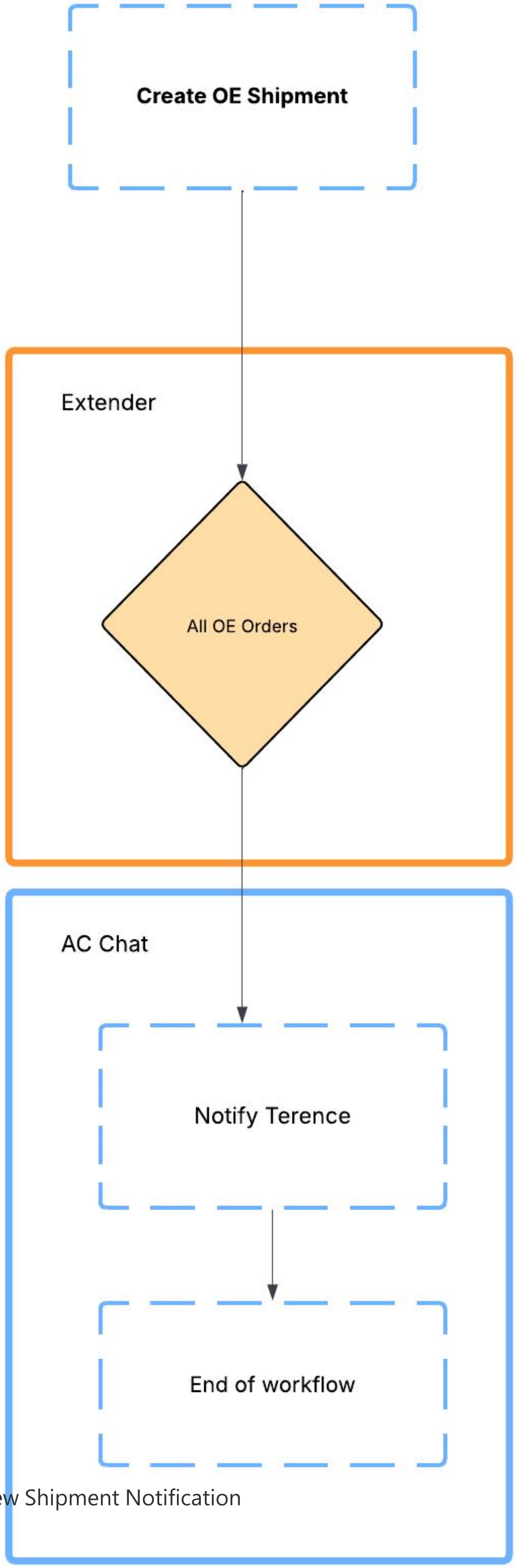
O/E New Shipment Notification

This workflow template creates a notification in A/C Chat based on the workflow rules.

The delivery driver can then update the delivery details in the chat, capture a signature and proof of delivery documents.

WHAT IS AN O/E SHIPMENT NOTIFICATION?

To inform relevant parties (e.g., customer service, logistics, sales) when a new shipment has been initiated, allowing them to track and communicate delivery information.


Create OE Shipment
Extender
All OE Orders
AC Chat
Notify Terence
End of workflow

HOW TO SET UP SHIPMENT NOTIFICATION?

You need to import the Extender Module and configure the Workflow Rules.

Before you start

Step 1: Import Extender Module

Import and enable the **OEWORKFLOW.New Shipment Notification** module in Extender Setup > Modules. This imports the workflow templates and related message templates for Sage 300 Sales Order .

Step 2: Add a A/C Chat template for O/E New Shipment Notification . Include preset users if required.

See Details In How To Install TeamWork On Page 6

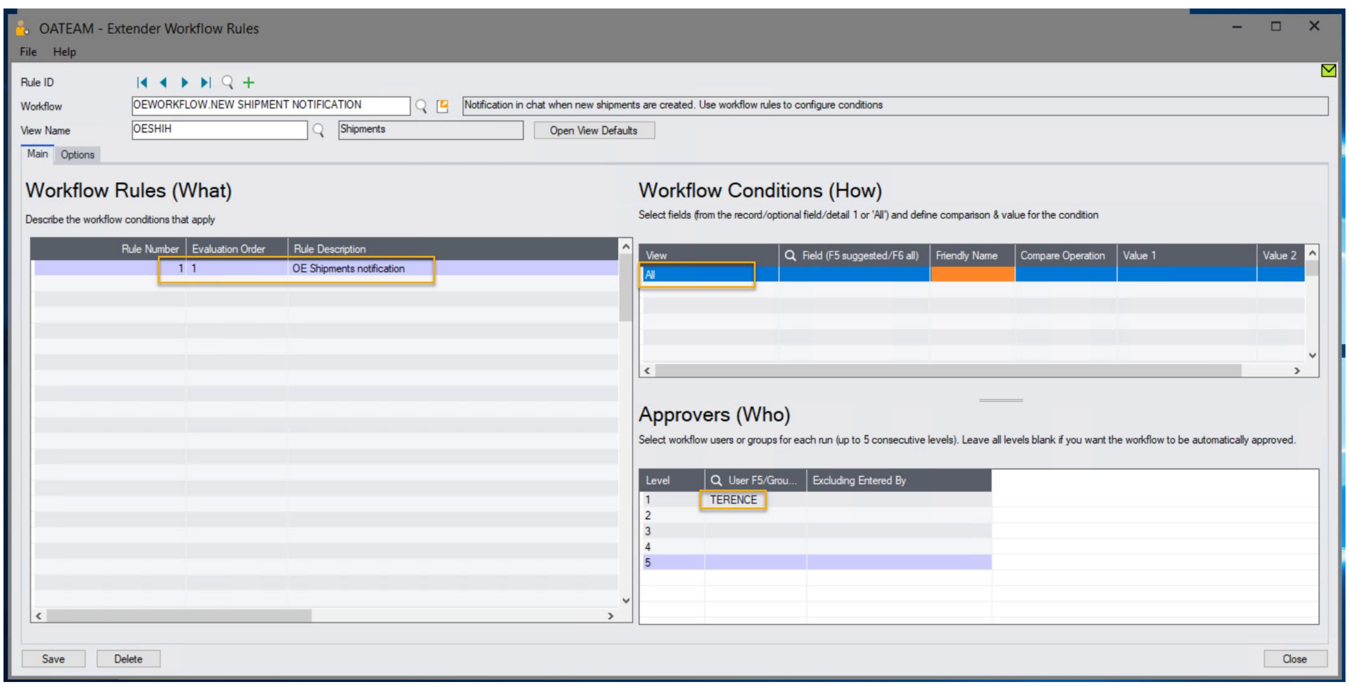
Setting up workflow rules:

Rules can be based on any combination of fields on the Shipment , Shipment r optional fields (header) and the first line of the S hipment.

In the example below, the rules are based on all the shipments causing notifications.

In Extender Setup > Workflow Rules,

Step 1: Search for your required workflow template. Select `OEWORKFLOW.New Shipment Notification` and OESHIHas the View name.



Step 2: Set up Workflow Rules :

All shipments send notifications.

For details, see Workflow Rules: Conditions (How) setup

Note:

Step 3: On the Options Tab, select the A/C chat template

Step 4:

Note:

Step 5: Save the workflow rules page to save your configuration of the workflow template.

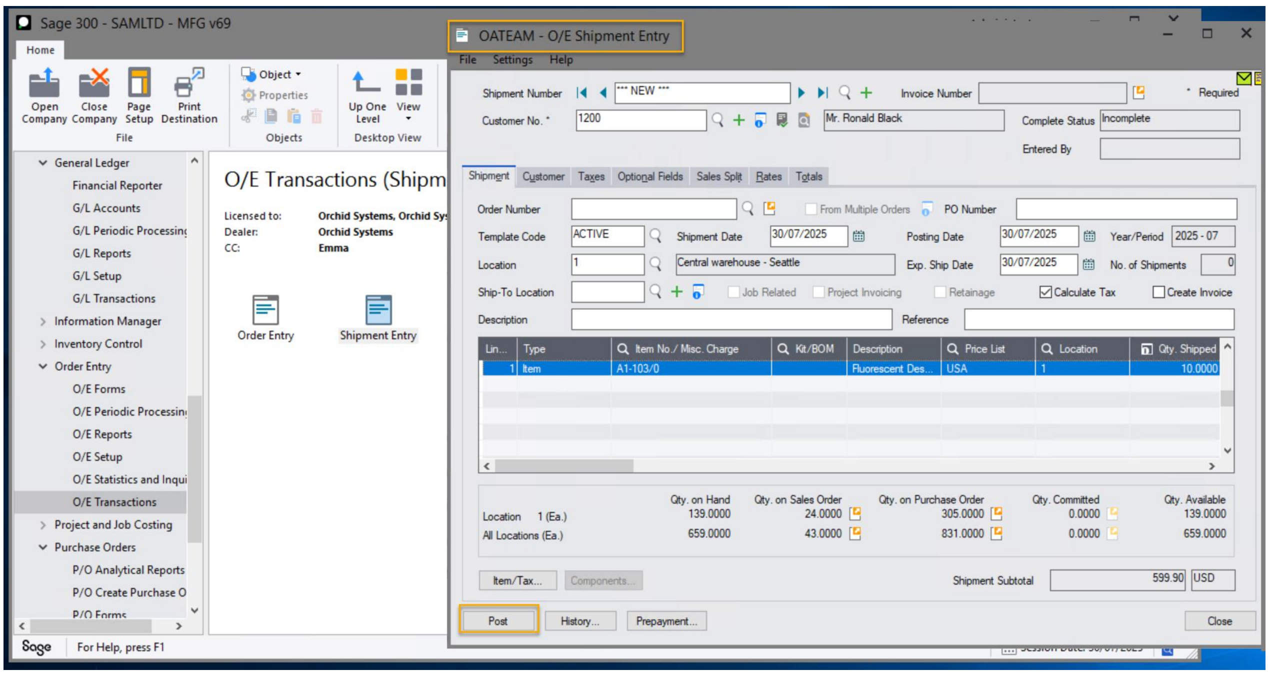
Using the OE Shipment Notification workflow

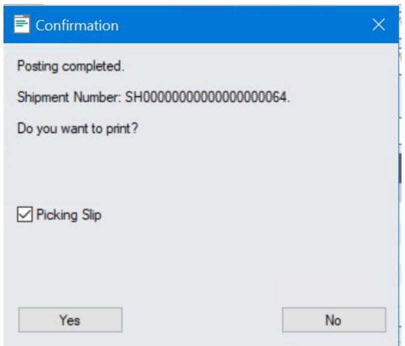
STARTING THE WORKFLOW

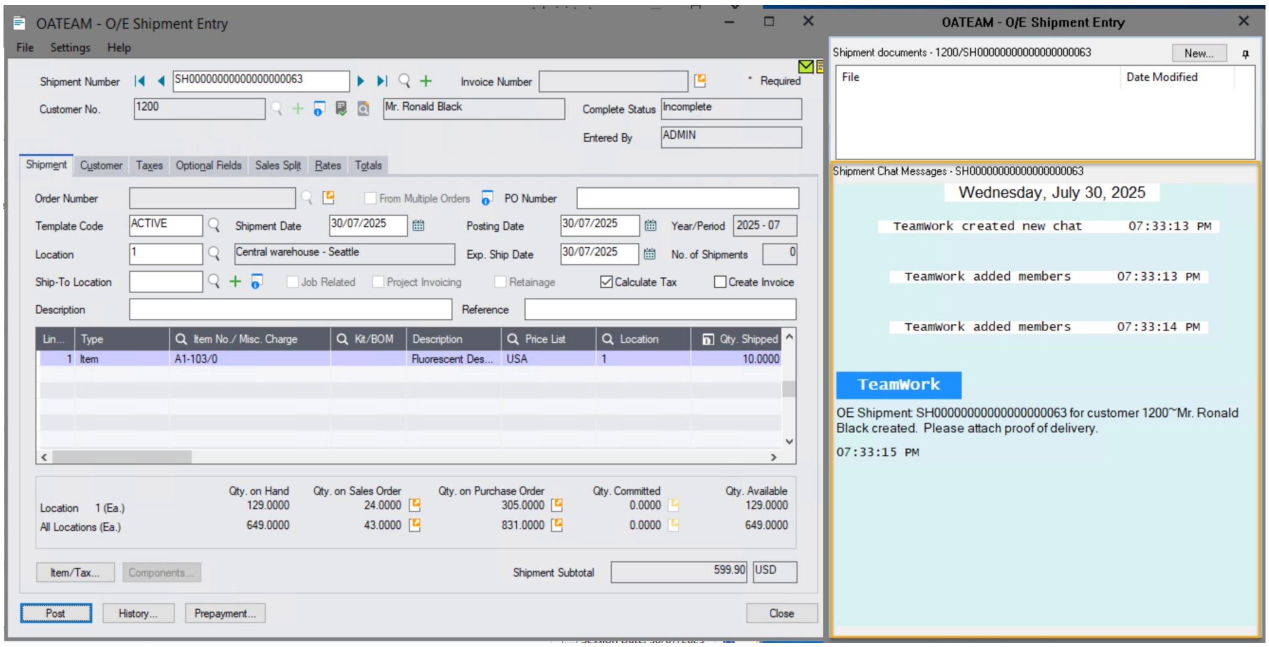
Step 1: Shipment Notification:

A user creates and saves a new Sales Order with over 100 items. Shipment Notificationworkflows are triggered. The system notifies the user of the workflow starting.

Users ahe screenshots below will demonstrate the situation with over 100 items.re then notified of the new shipment process starting.



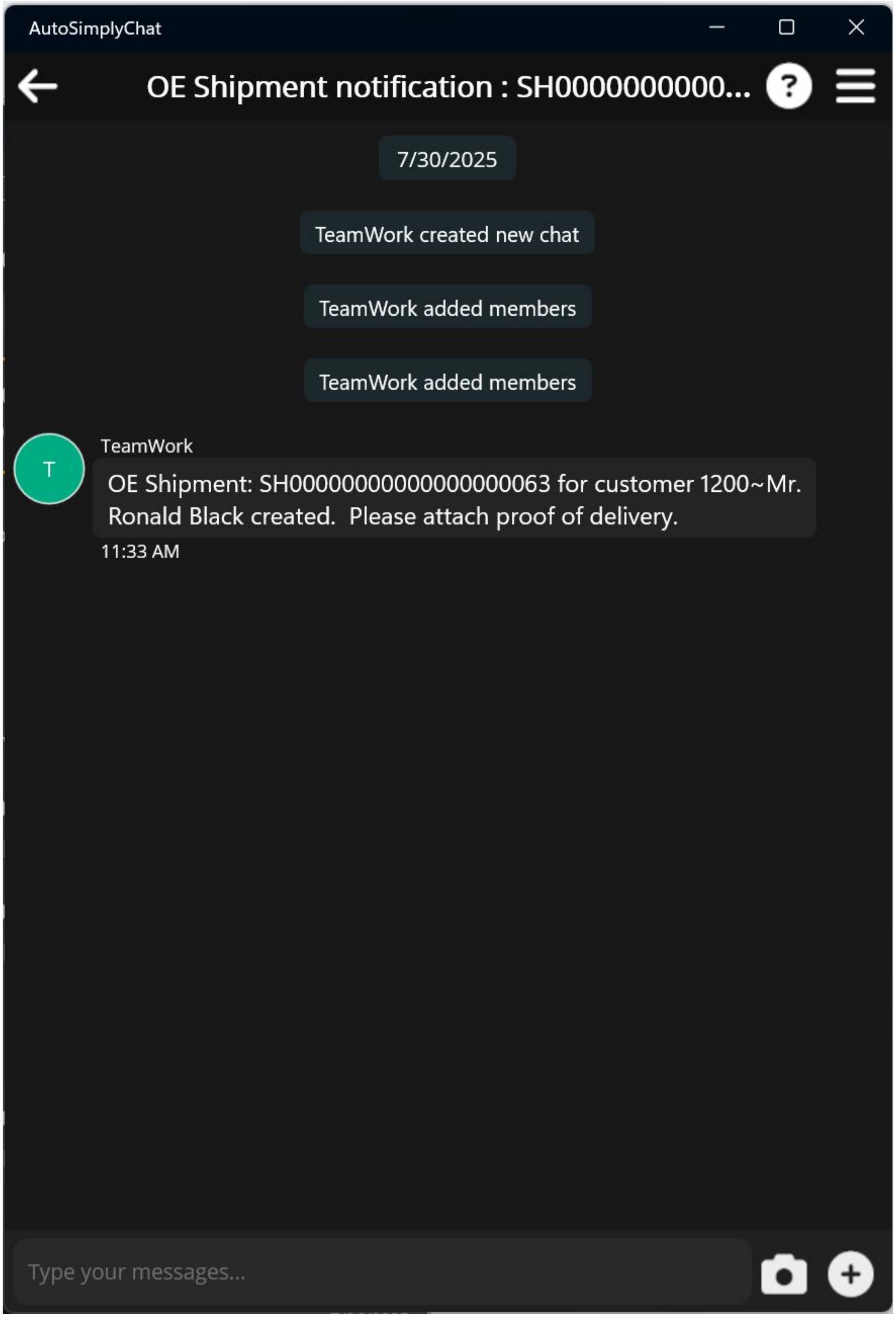


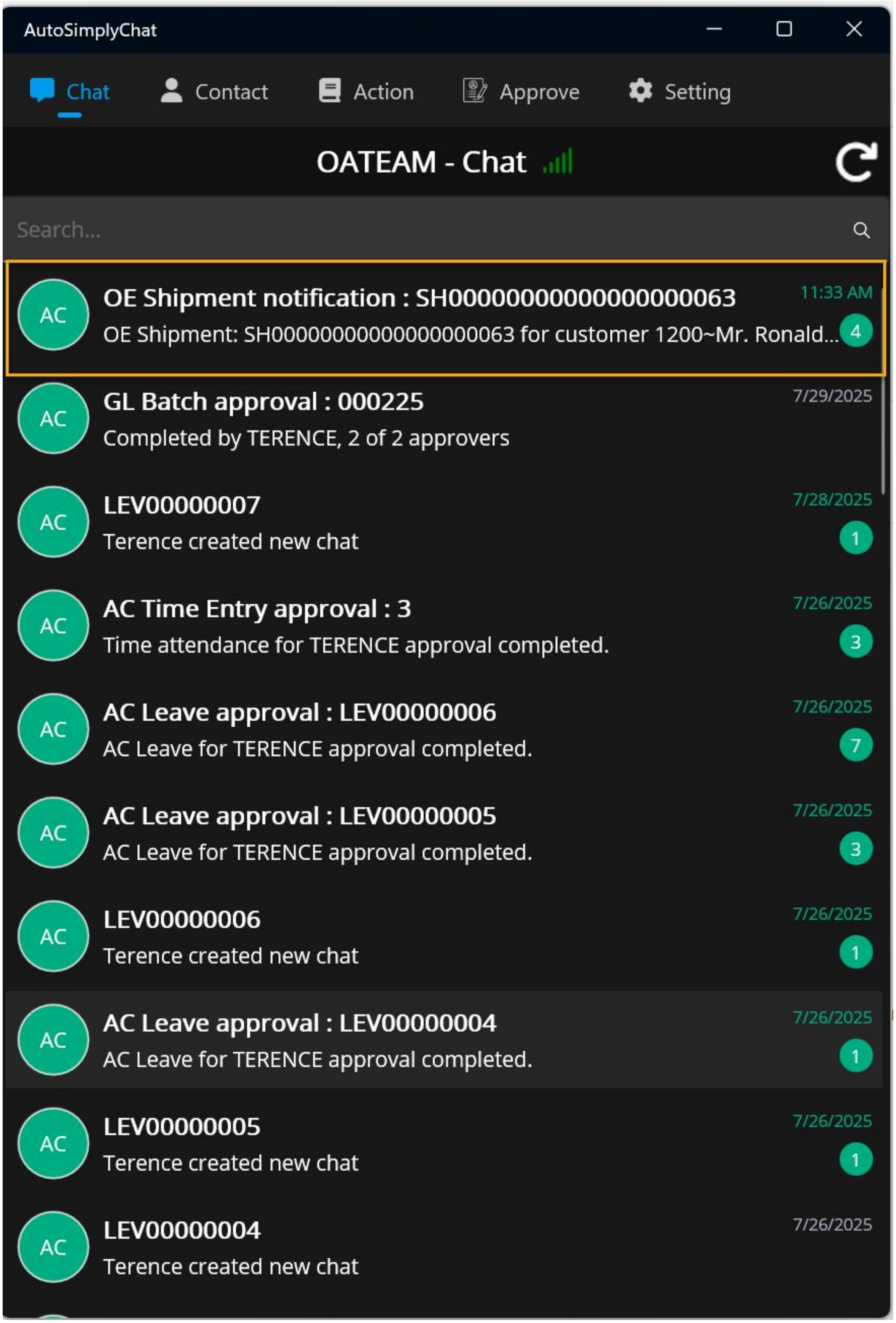


Step 2: `Approval Request`:

The workflow evaluates the conditions in the rules and sends an approval request to the assigned approver(s) (e.g., department head, procurement manager, finance).

Step 3: `Review & Action`


AutoSimplyChat
OE Shipment notification : SH0000000000...
7/30/2025
TeamWork created new chat
TeamWork added members
TeamWork added members
T
TeamWork
OE Shipment: SH00000000000000000063 for customer 1200~Mr. Ronald Black created. Please attach proof of delivery.
11:33 AM
Type your messages...


AutoSimplyChat
Chat
Contact
Action
Approve
Setting
OATEAM - Chat
Search...
OE Shipment notification : SH0000000000000000063
11:33 AM
OE Shipment: SH0000000000000000063 for customer 1200~Mr. Ronald...
4
GL Batch approval : 000225
7/29/2025
Completed by TERENCE, 2 of 2 approvers
LEV00000007
7/28/2025
Terence created new chat
1
AC Time Entry approval : 3
7/26/2025
Time attendance for TERENCE approval completed.
3
AC Leave approval : LEV00000006
7/26/2025
AC Leave for TERENCE approval completed.
7
AC Leave approval : LEV00000005
7/26/2025
AC Leave for TERENCE approval completed.
3
LEV00000006
7/26/2025
Terence created new chat
1
AC Leave approval : LEV00000004
7/26/2025
AC Leave for TERENCE approval completed.
1
LEV00000005
7/26/2025
Terence created new chat
1
LEV00000004
7/26/2025
Terence created new chat

Step 4: Workflow Completion:

- Approved: The New Shipment Notification is sent to Terence.

VIEWING CHAT AND STATUS

When TeamWork is enabled, users can view the chat messages and the workflow approval status, using the Notes tray configured for the P/O Purchase Order screen (using the Sage 300 desktop screen).

Workflow history and audit logs

Extender logs all workflow steps: Use the Workflow Inquiries > Workflow Detail log to view the approvers and their comments. The Workflow Detail log also includes auto-completed workflow for audit purposes.

Workflow Inquiries and Reports

TeamWork users can use A/C Chat Inquiries to view all chats related to the approvals.

Purchase Order Approval

Purchase Orders (PO) are reviewed and authorized by management based on criteria like amount, vendor, or item before being issued to suppliers.

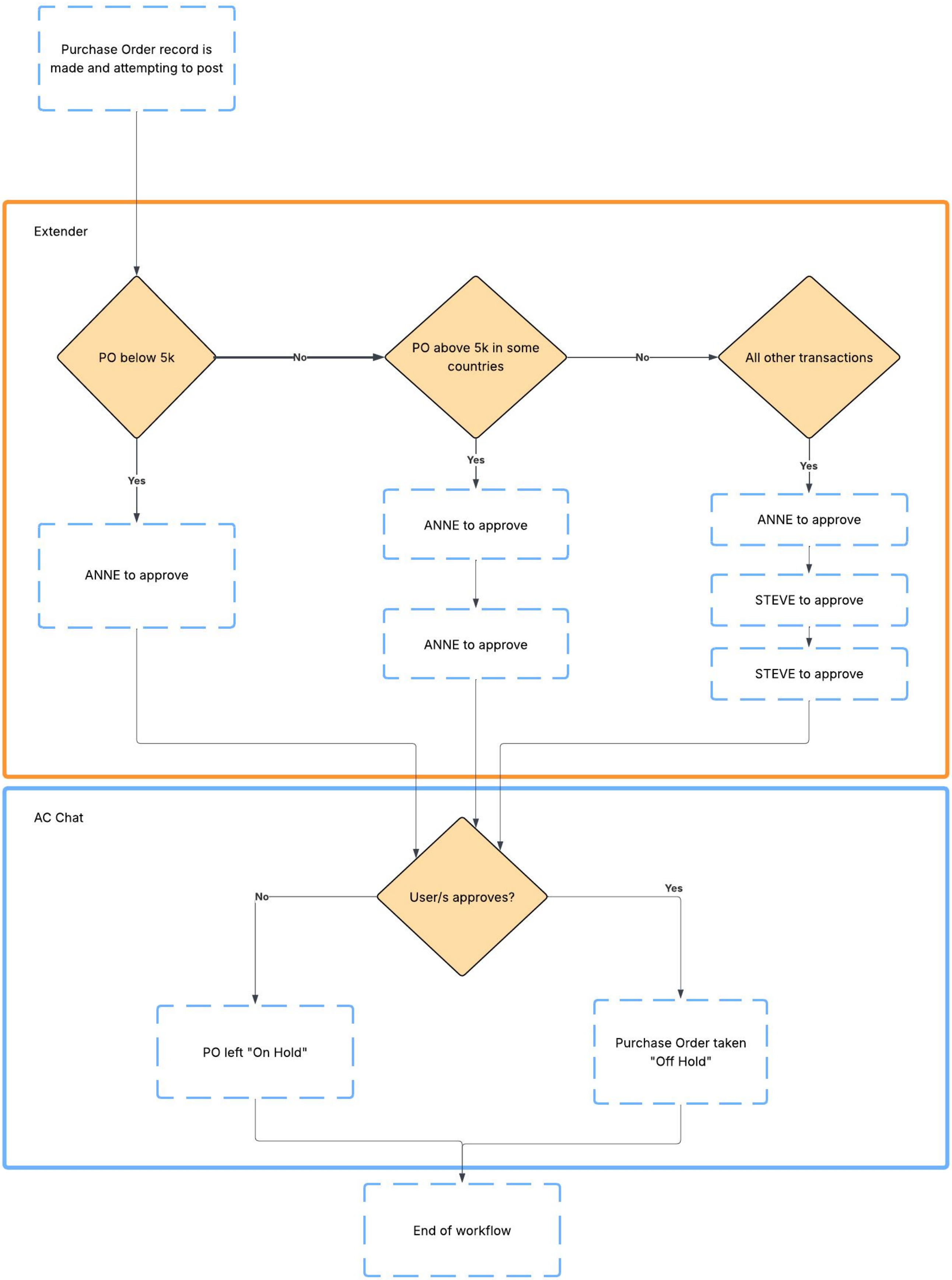
If the PO's properties (e.g., total amount, department, specific items) meet one of the defined conditions, the Purchase Order Approval workflow triggers.

> **Note:** The process described below is similar for other transaction records in Sage 300, such as Purchase Requisitions and O/E Sales Order.

WHAT IS PURCHASE ORDER APPROVAL?

When a user posts a Purchase Order, the workflow evaluates the Workflow Rules. If no approval is required, the workflow auto-completes. If the PO requires one or more approvals, the PO remains on hold until all users have approved.

- When all users have approved, the PO is released, set off hold and the form can be saved as a PDF in the configured folder.
- When one user rejects, the workflow completes and the PO remains on hold.
- Users need to adjust and start the approval process again by taking the PO off hold.


Purchase Order record is made and attempting to post
Extender
PO below 5k
No
PO above 5k in some countries
No
All other transactions
Yes
ANNE to approve
Yes
ANNE to approve
ANNE to approve
Yes
ANNE to approve
STEVE to approve
STEVE to approve
AC Chat
User/s approves?
No
Yes
PO left "On Hold"
Purchase Order taken "Off Hold"
End of workflow

HOW TO SET UP PURCHASE ORDER APPROVAL?

You need to import the Extender Module and configure the Workflow Rules.

Before you start

Step 1: Import Extender Module

Import and enable the **TEAMWORKPO.Purchase Order Workflow** module in Extender Setup > Modules. This imports the workflow templates and related message templates for Sage 300 Purchase Order.

Step 2: Add a A/C Chat template for P/O Purchase Order. Include preset users if required.

See Details In How To Install TeamWork On Page 6

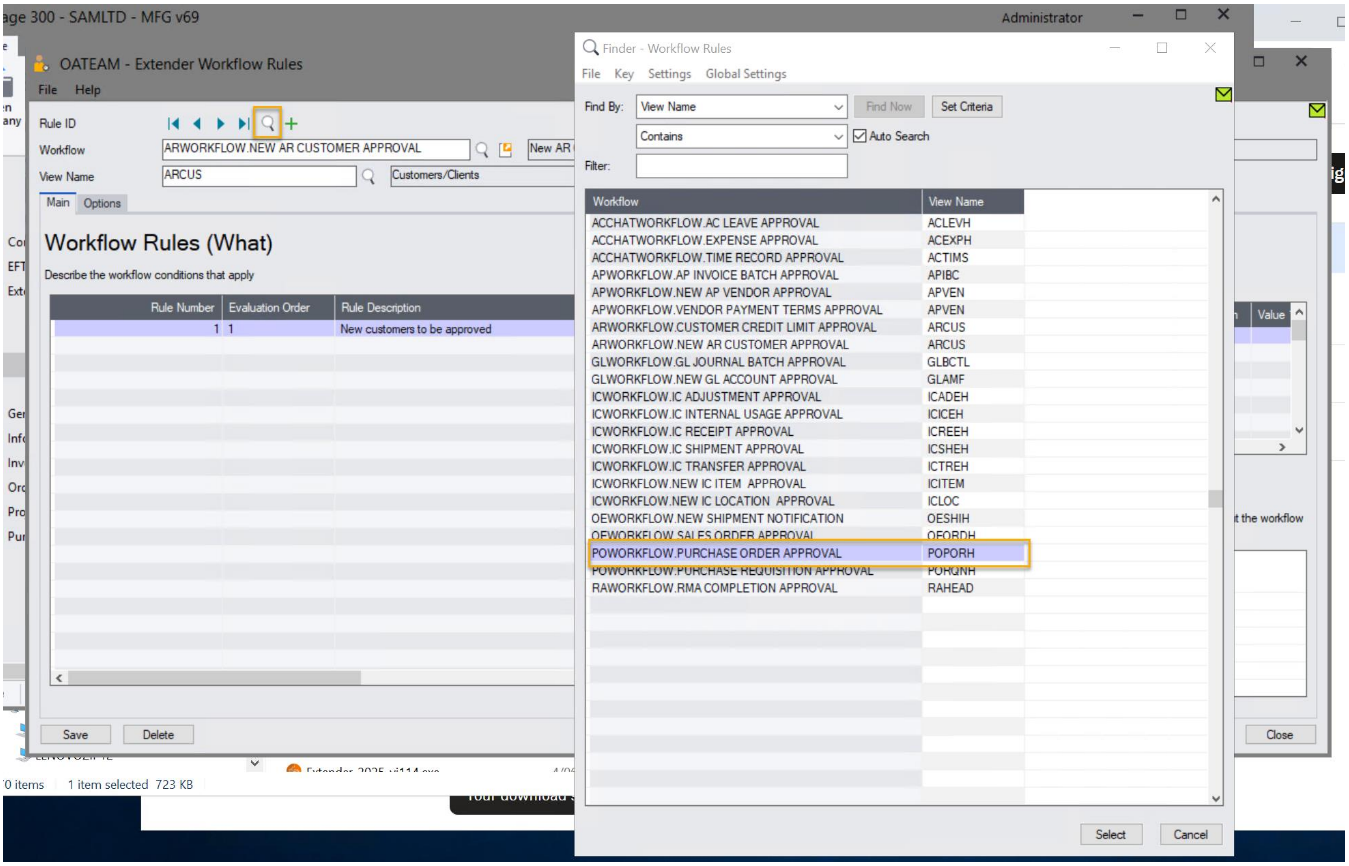
Setting up workflow rules:

Rules can be based on any combination of fields on the Purchase Order, Purchase Order optional fields (header) and the first line of the Purchase Order.

In the example below, the rules are based on the P/O Total Amount and the Vendor's country.

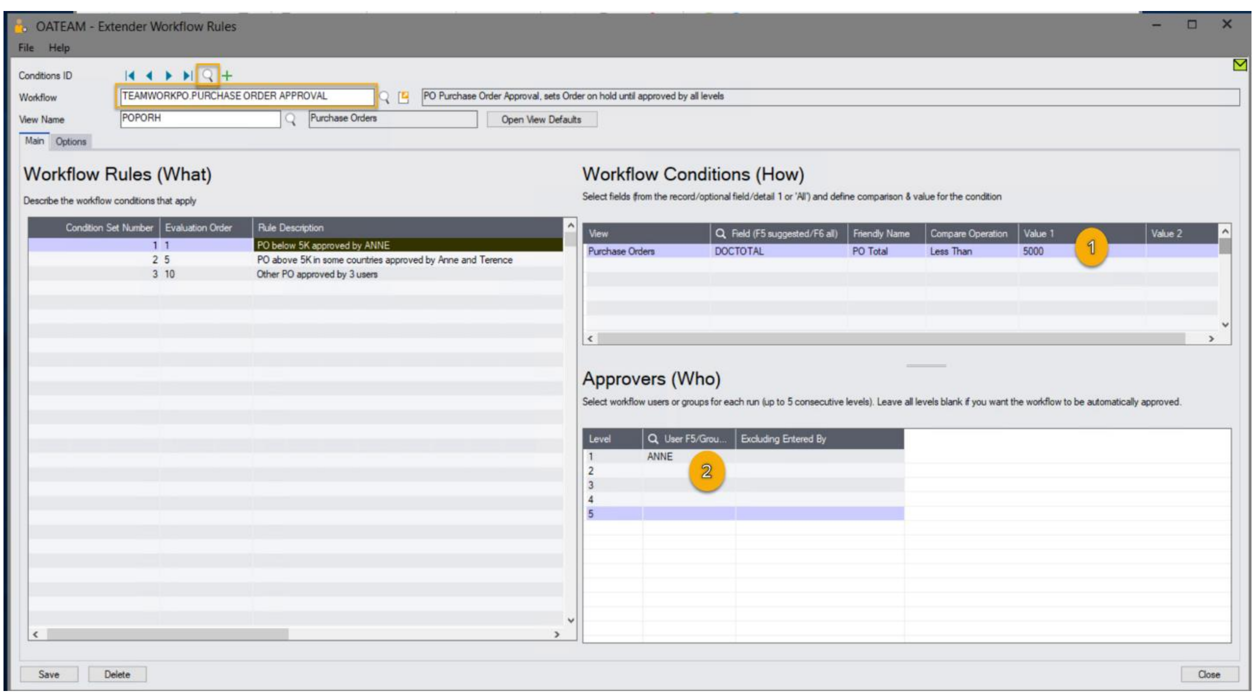
In Extender Setup > Workflow Rules,

Step 1: Search for your required workflow template. Select POWORKFLOW..PURCHASE ORDER APPROVAL and POPORH as the View name.



Step 2: Set up Workflow Rules :

Rule 1: DOCTOTAL < 5000 [1], the approver is Anne [2]

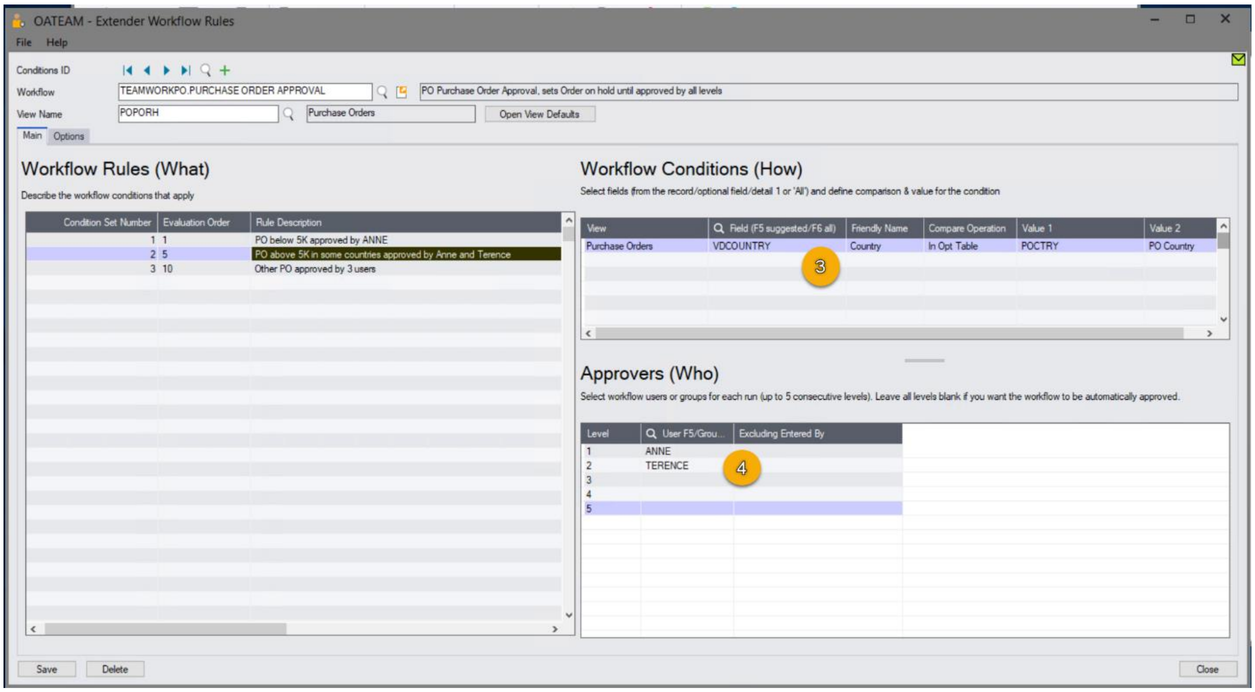


Rule 2: Doc total is above 5k and in some countries[3], the approvers and Anne and Terence [4]

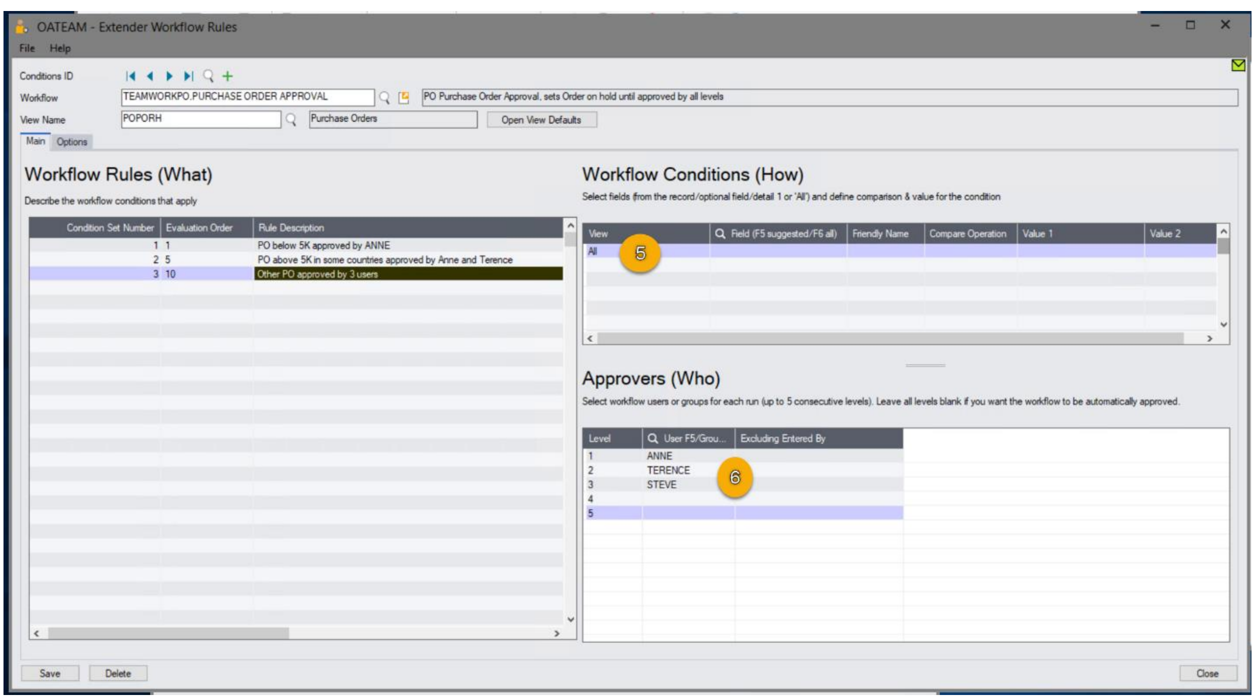
The list of countries is configured in a Sage 300 optional table for ease of maintenance.

For details, see Workflow Rules: Conditions (How) setup

Note: You could also use the IN compare operation, and list the countries in Value 1. This would work if you have a short list of countries, it isn't used in other rules or Sage 300 screens and it doesn't change often.



Rule 3: All other purchase orders [5] are approved by Anne, Terence and Steve [6]



Step 3: On the Options Tab, select the A/C chat template

Step 4: On the options Tab, select the PrintPurchaseOrder report if you want the workflow approval step to save the PO as a PDF in the configured folder.

Note: This requires to configure the folder and the Crystal report to use in the TeamWorkPO configuration table.

Step 5: Save the workflow rules page to save your configuration of the workflow template.

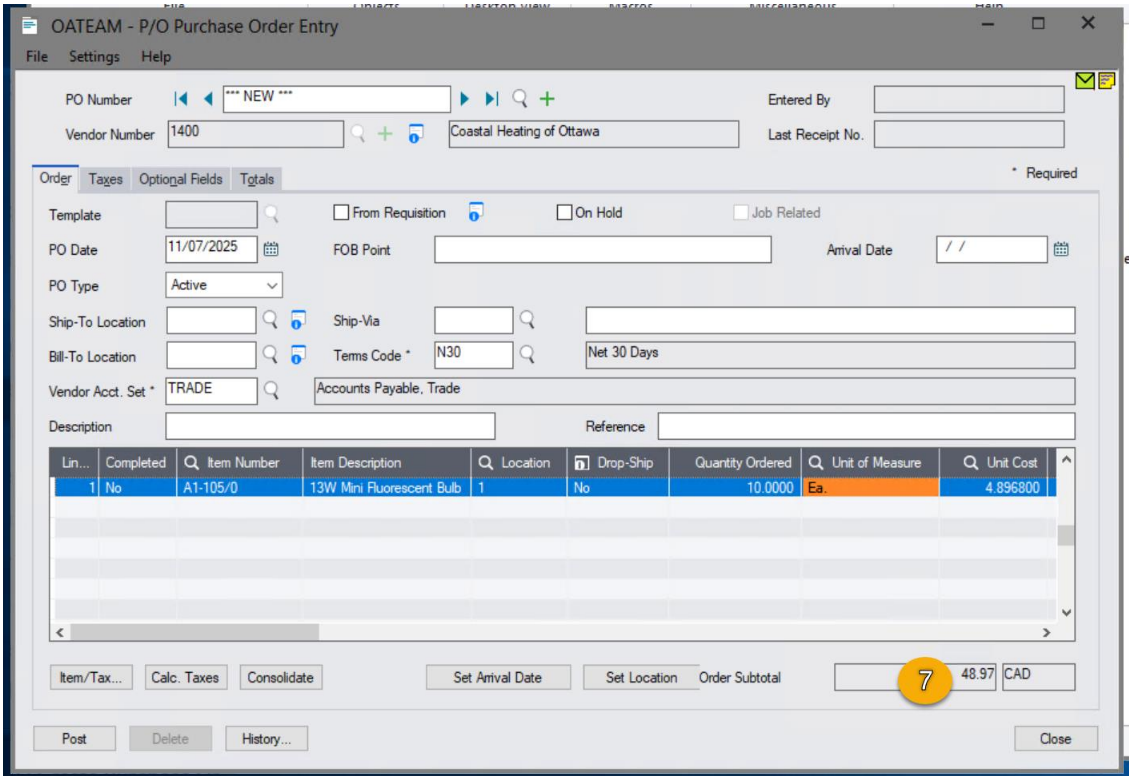
Using the Purchase Order approval workflow

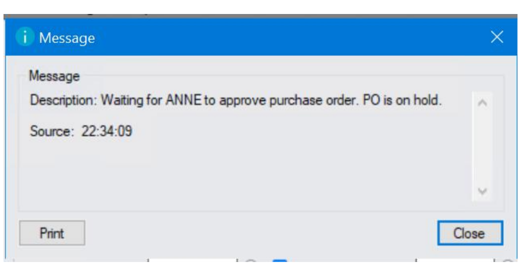
STARTING THE WORKFLOW

Step 1: Purchase Order Creation:

A user creates and saves a new Purchase Order of over 5k in the system [7]. The workflow is triggered. Purchase Order is on hold. The system notifies the user of the workflow starting.

Users can only take the PO off hold by approving the workflow.





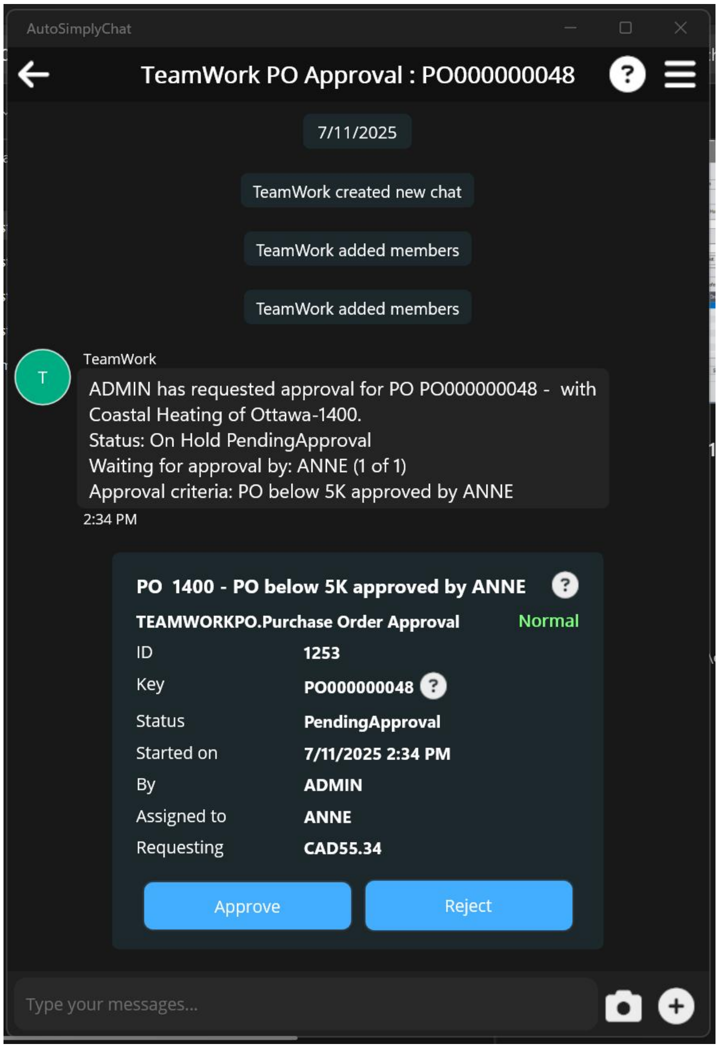
Step 2: `Approval Request`:

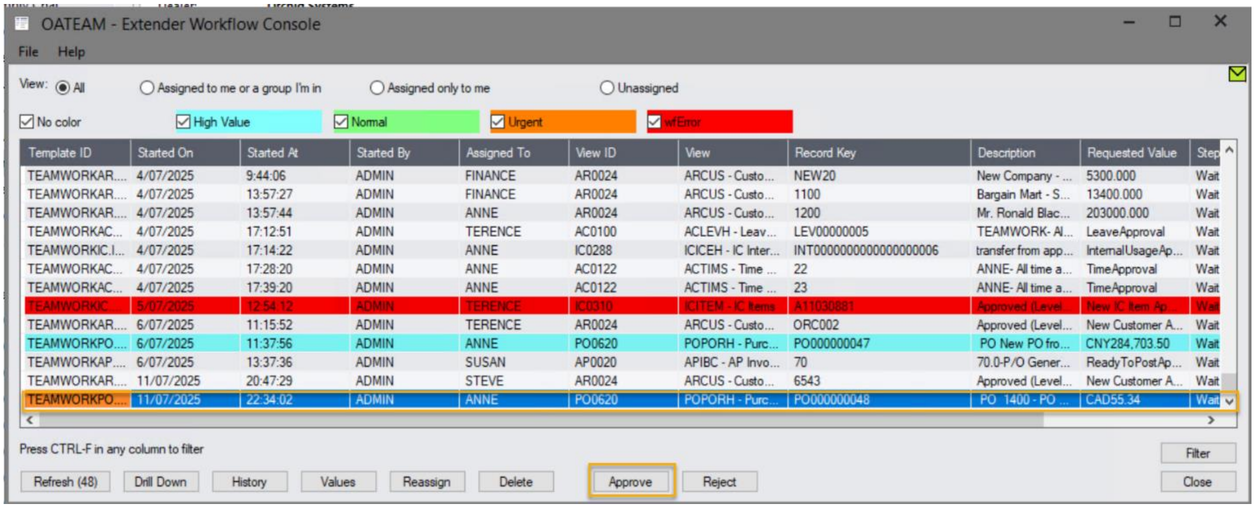
The workflow evaluates the conditions in the rules and sends an approval request to the assigned approver(s) (e.g., department head, procurement manager, finance).

Step 3: `Review & Action`

Approver reviews the PO details, cost, and necessity, then approves or rejects. Approvers can approve in A/C Chat app (if using TeamWork) or in the Extender workflow console.

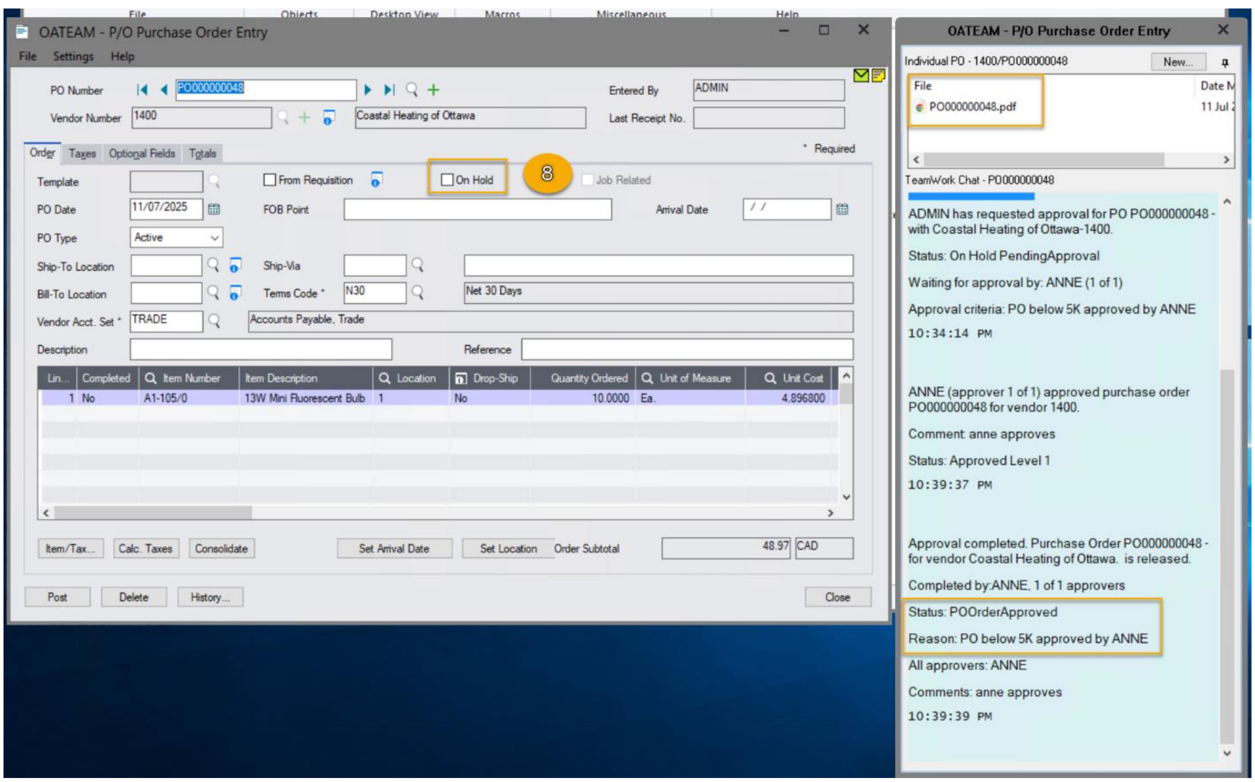
Tip: When using TeamWork, you can use the ? icon to print a draft purchase order. The draft PDF will be saved in the chat.





Step 4: Workflow Completion:

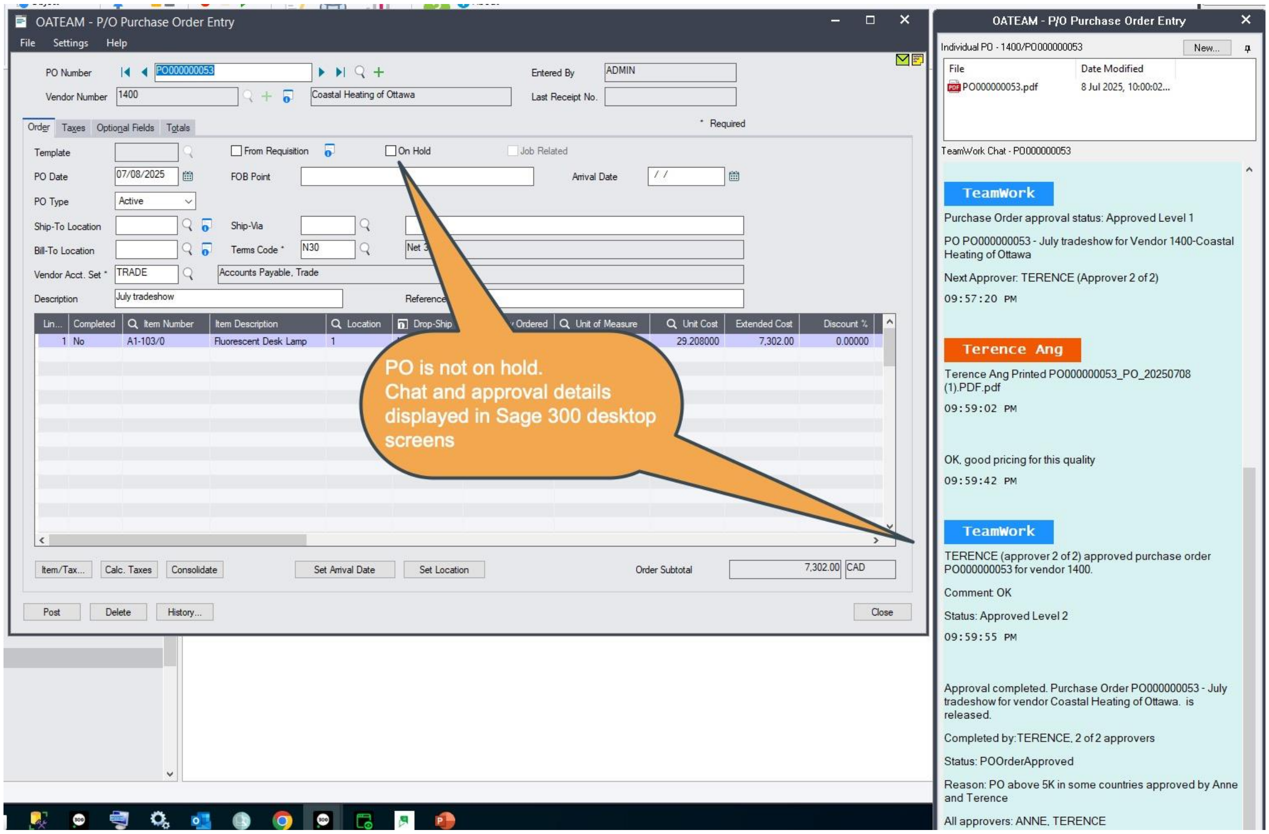
- Approved: The Purchase Order's status updates to allow issuing to the Off Hold [8], If the Print Report option is configured, the PO PDF document is created.



- **Rejected**: As soon as one user rejects, the workflow completes. The Purchase Order remains on hold , and it's returned for modification or cancellation. The workflow status indicates rejection.

VIEWING CHAT AND STATUS

When TeamWork is enabled, users can view the chat messages and the workflow approval status, using the Notes tray configured for the P/O Purchase Order screen (using the Sage 300 desktop screen).



Workflow history and audit logs

Extender logs all workflow steps: Use the Workflow Inquiries > Workflow Detail log to view the approvers and their comments. The Workflow Detail log also includes auto-completed workflow for audit purposes.

Workflow Inquiries and Reports

TeamWork users can use A/C Chat Inquiries to view all chats related to the approvals.

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