Extender

For Sage 300 (Accpac)

OrchidSystems

sage | Development Partner Endorsed / Development Partner Gold

Trigger notifications & **workflows** when **data changes**
Customize Sage 300 **business logic** without complex code
Develop your own **Views** and **Screens** without the complexity of SDK

WHAT IS EXTENDER?

Extender, from Orchid Systems, provides a powerful yet cost-effective platform for the customization of Sage 300.

This can range from simple logging and alerting through to screen customizations, custom tables, complex workflows, or integration with external applications. All customizations, including Python scripts, form part of your Sage 300 database. Extender is available in four editions:

Configurator Edition

Configure Events and Workflows associated with a View Field or View Operation (insert, update, delete or insert/update). Data is monitored in real time, with changes triggering actions that could include:
- Logging details of the data change (who, what, when).
- Sending an email, based on a configurable template.
- Creating an Orchid Note, based on a configurable template.
- Calling an external program.
- Triggering a Workflow that uses pre-defined actions.

Customizer Edition

In addition to Configurator functionality, the Customizer Edition supports more advanced customization at different levels, using Python scripts:
- View Level – implement business-specific logic at the View Level by subclassing Sage 300 business logic (Views) and making use of a collection of SDK View calls.
- Screen Level – construct Custom Screens, or customize existing screens. Make use of Sage 300 screen controls, without the need to develop the UIs in the traditional Sage 300 way (using VB/VBA).
- Develop Custom Actions to support more complex Workflows.

Developer Edition

In addition to Customizer functionality, the Developer Edition allows you to develop your own Custom Tables. It provides a development environment within which you can:
- Create your own Sage 300 business logic (Views), with associated View calls and underlying database tables, in the Sage 300 company database.
- Maintain the Sage 300 database dictionary without being an expert Sage 300 SDK developer.
- Use the Custom Table Editor to create, update and delete the data in your Custom View – or write a script for a tailored screen.
- Amend Custom Tables (e.g. add or remove fields) while preserving existing data.
- Associate Custom Tables, Scripts, Screens and Events by Module ID for easy deployment between companies on one site, or across sites.
- Develop Custom Workflow Actions incorporating Custom View/Table data.

Runtime Edition

Load and run specific Extender Certified Apps from 3rd party developers.

Change to Customer Credit Limit creates notification email, Extender Log entry, and Workflow Instance for approval. Workflow Console & Log can be opened using screen icons.
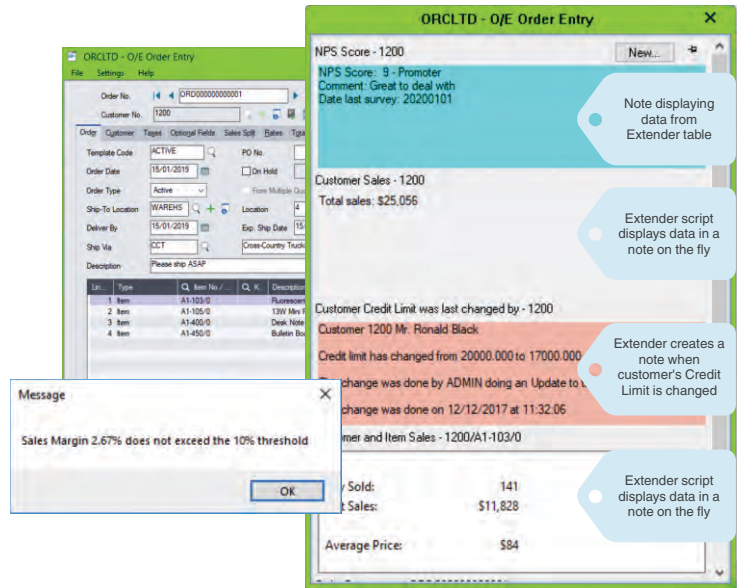
EXTENDER WORKFLOW

Workflow, the most recent addition to Extender, allows you to define Workflow Templates and attach them to Sage 300 view fields, screens or view operations. They can work with Sage 300 Masterfiles, Transaction header views, or Batch views.

- Each Workflow Template comprises a sequence of steps, which in turn represent a series of value-dependent Workflow Actions (Python scripts) to be executed when a step is invoked.

- Workflow instances can be triggered automatically when a data change occurs, or a Python script is executed. They can also be started manually using a Workflow Icon on a Sage 300 screen.

- A user assigned to a workflow instance can progress it to the next step using a Workflow Icon, or via the Workflow Console. The console allows them to navigate through the workflow records, approve or reject requests, and drill down to Sage 300 screens.

Work Smarter with Orchid

Extender
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BENEFITS

- Enhance the value of existing Sage 300 implementations through cost-effective customization.
- Create new screens without complicated programming.
- Easily apply company-specific customizations to Sage 300 Views, or introduce custom Workflows.
- Use Python scripts to tailor tabs, fields, buttons and finders on existing Sage 300 screens.
- Save time and money with version-independent enhancements.
- Provides SDK customization, without needing to understand all the complexity of the Sage 300 SDK.
- Enhanced auditing capability on any table, any field, at any time. Log what changed, by whom, and when.
- Context-sensitive drill down into changes recorded in Logs – without leaving the screen or running reports.
- Python scripts & Custom Tables are preserved as part of the Sage 300 company database, and can be Dumped and Loaded.
- Configurable security – per user, per Sage 300 View.
- Synchronize between systems more efficiently, in real time. Only update data that has changed.
- Operates across all Sage 300 modules, as well as third party modules written in the Sage 300 SDK.
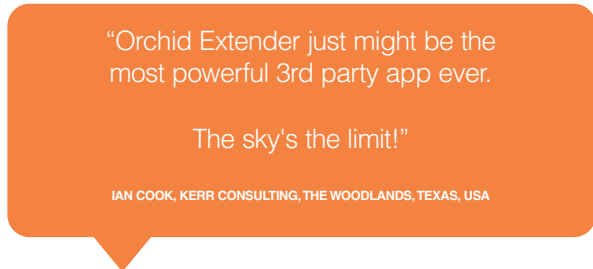

Tailor Order Entry screen with Extender script to validate Margin %.
Use Notes to display information from Extender custom tables and conditional notes

> Python scripts are backed up with the company data, so the customizations will Dump & Load

> "Orchid Extender just might be the most powerful 3rd party app ever.
>
> The sky's the limit!"
>
> **IAN COOK, KERR CONSULTING, THE WOODLANDS, TEXAS, USA**
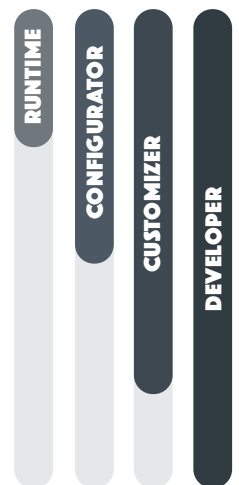
BUSINESS SCENARIO EXAMPLES

- Improve data capture quality by using scripts to validate entered values and/or provide default values.
- Create additional reallocation and deferral transactions in the General Ledger based on custom business rules.
- Automatically create A/P Invoices for salesperson commission based on custom business rules.
- Print and Email order confirmations and invoices automatically based on customer preferences.
- Create files to update external applications when events occur, e.g. Shipment details for the warehouse.
- Enhance security with system logging and custom security scripts, e.g. Apply security at a Field level, or deploy data level security by User or Group.
- Validate changes to field data according to defined limits and users, e.g. who can change a credit limit and to what limit.
- Create a table to store comment templates for items, to be auto-inserted onto Order Item comment or instruction lines when the Item is added to the order.
- Use Python scripts to add a freight charge to an order at the click of a button, or simplify the capture of Optional Field data.
- Auto-assemble Bills of Materials on the fly as orders are created.
- Synchronize the on-premises Sage 300 Vendors, Customers, GL Codes and Currency Rates to a cloud-based invoicing system.
- Configure a Workflow to approve customer credit limits and log approval history.

Extended Notes: Use Orchid Notes to trigger the execution of an Extender script and display the result.

EDITION GUIDE

	RUNTIME	CONFIGURATOR	CUSTOMIZER	DEVELOPER
Runtime Engine Run Certified Extender Apps				
Alerts / Logs Keep people informed Log changes to critical data Facilitate real time integration with other systems Configure Workflows				
Scripts / Screens Automation, Validation, Security, Customization New screens and processes Tailor Sage 300 to your business Advanced Workflows				
Tables / Modules Develop new functionality and Modules with your own Sage 300 Views (Tables and business logic), without being an SDK Developer				

MINIMUM REQUIREMENTS
Extender 2020 requires Sage 300 2020, and operates with 3rd party modules written in the Sage 300 SDK. Notes functionality requires Orchid Notes. Orchid User licences are required to access Extender Workflow functionality, or to access Extender Logs via screen icons.

Contact your Sage Software Solution Provider.

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