# TeamWork
for Sage 300

"Mobile, chat-based collaboration and management for Sage 300"

What is it?

TeamWork provides a new way for teams to work together, with conversations and actions shared across mobile devices and Sage 300 screens.

TeamWork integrates AutoSimply's AC Chat with Orchid's workflow and collaboration capability, supported by easy-to-use templates and configuration options. It:

- Provides configurable alerts, notifications, and approval workflows for Sage 300 records in a chat interface.
- Includes a made-for-mobile version of Orchid's Extender Workflow Console, with the added Chat functionality.
- Provides a versatile alternative for communicating about Sage 300 transactions and masterfiles, as well as monitoring and actioning your workflow tasks in Sage 300.
- Provides visibility of chats between non-Sage users on the Sage 300 screens.
- Can be combined with Orchid Document Management Link to make signatures and photos captured on the mobile device available in Sage 300.
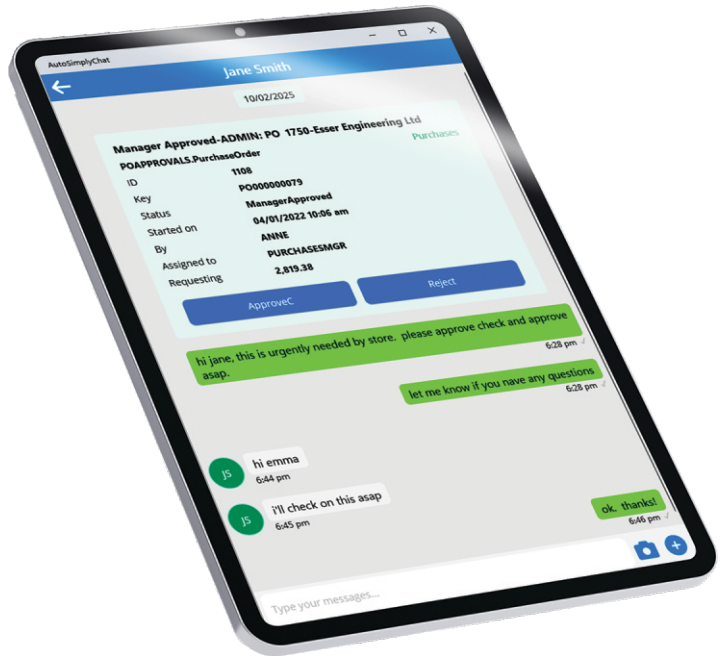
App-based Approval with associated Chat

Why use it?

- Real-time communication: users can discuss Sage 300 transactions instantly, reducing delays in approvals or updates.
- Improved collaboration: teams across different departments can coordinate efficiently in a single chat platform, reducing the need for back-and-forth emails.
- Better tracking and documentation: conversations can be logged in a structured way, and referenced later, to track decisions related to Sage 300 transactions.
- Remote accessibility: Employees can access updates from anywhere, via mobile or desktop chat apps or in Sage 300 screens.

About the Mobile App

Designed specifically for smartphones or tablets, the TeamWork App includes Chat functionality as well as a streamlined, personalized, at-a-glance alternative to the desktop version of Orchid's Extender Workflow Console.

Order-related Chat with Proof of Delivery
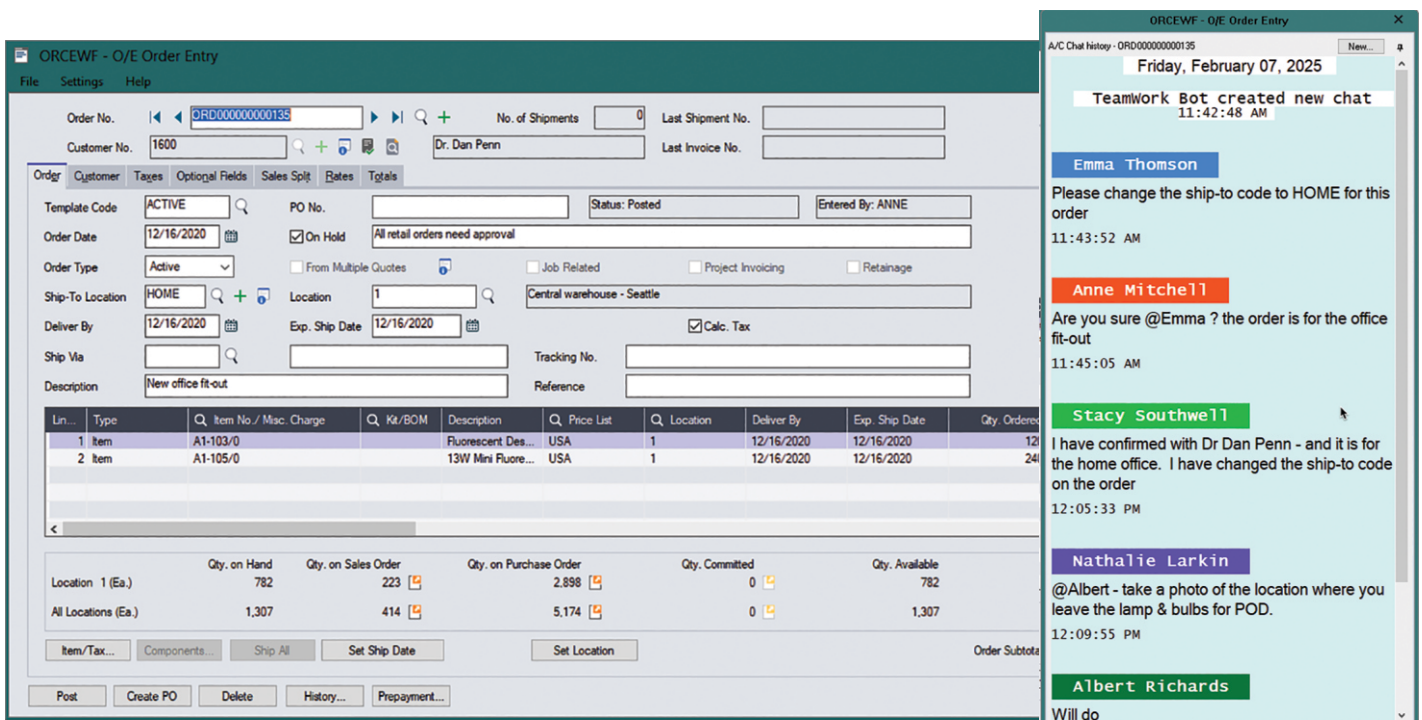
Using the App

Install from your device's App Store (Google Play, Apple Store, Microsoft Store).

- Open the App, log in to Sage 300 using your saved credentials, select your Company
- View and participate in Chats that you are part of
- View a list of all open Workflow tasks assigned to you (or a group you are in)
- Select a task to display more detail
- Action the task, as configured (e.g. Enter a value and/or comment, Approve or Reject)
- Your responses are reflected in Sage 300, in real time
- See a refreshed task list each time you return to the main display

Use Case examples

- Sales Operation team updates Sales Order status, and warehouse personnel update pick status.
- Drivers update shipment status and save proof of delivery images, automatically triggering invoicing.
- Customer, Vendor, and Item feedback is entered by and shared between sales, purchasing, and warehouse personnel.
- Request I/C stock usage or I/C Transfer from a chat without logging into Sage 300.
- Approve a Customer credit limit change.
- Request creation of a new G/L account.
- Request and approve a purchase requisition.

Sage 300 Order Entry screen with related Chat log

☑ Minimum Requirements

TeamWork works in conjunction with the Chat capability provided by AutoSimply AC Chat, the Workflow capability provided by Orchid Extender (all editions) and the Information Manager Notes features. Each TeamWork user can access AC Chat user and/or Extender Workflow User functionality. TeamWork requires Sage 300 to be installed.

More information

Further information about TeamWork, including videos, is available from AutoSimply and/or Orchid's Website: www.orchid.systems

Contact your Sage Software Solution Provider