



# Which Orchid products are for you?

## Collaboration & Intelligence



### Notes

- Do your staff regularly refer to information outside Sage 300, such as post-it notes and other documentation, to help them with their tasks?
- Are your efforts to increase collaboration being stifled by having key information held in ways that don't facilitate sharing of knowledge?
- Would you like to have relevant and contextual alerts, procedural instructions or other information presented where and when it's needed, flexible enough to include images and hyperlinks, and all stored and managed within Sage 300?



### Document Management Link

- Do your employees need to file, locate and refer to various documents (POs, Invoices, Contracts etc.) when processing transactions in Sage 300 or answering customer queries?
- Are your aspirations to support staff mobility, remote working or multiple office locations being held back by a reliance on physical documents?
- Does the prospect of a paperless office, with seamless integration between Sage 300 and your document management or file sharing system, (e.g. SharePoint, OneDrive, Dropbox, Google Drive), sound appealing?



### Info-Explorer

- Do you have to make do with static, two-dimensional extracts and reports when analysing business data, and spreadsheets when producing budgets and forecasts?
- Are you frustrated by having to wait for up-to-date data to answer urgent questions, or by using reports that don't give you the right detail to make fully informed decisions?
- Do you love the idea of a powerful Business Intelligence tool with real-time 'slice and dice' capability, plus integrated budgeting and forecasting, but assume this would be out of reach for a business your size?

## Streamlining Financial Processes



### EFT Processing

- Do you need to send payments electronically to vendors or employees, collect receipts from your customers via direct debit, or send positive pay files to your bank?
- How confident are you that all your cash movements are secure, and would stand up to an audit?
- Would you like to cut costs and improve efficiency through increased automation, enhance auditability, and reduce exposure to fraud by moving away from paper cheques or streamlining positive pay file processing?



### 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?
- Are you wasting hours or days each month manually reconciling those accounts and creating balancing transactions?
- What if you could keep those entities in balance at all times, with offsetting entries being automatically generated in each company based on highly configurable rules, and with an extensive audit trail?



### Inter Entity Trade

- Do you manage multiple entities that trade goods or services with each other?
- Are you at risk of being overwhelmed by the volume of inter entity transactions that flow from ever more complex trading environments and organizational structures?
- How much time would you save if reciprocal documents could be automatically generated, removing the need for duplicate entries to be manually created and checked, while also improving accuracy and auditability?

## Automation & Productivity



### Report Runner

- Do you or your staff regularly spend time setting up, running and distributing recurring Crystal or Sage 300 Financial Reports?
- Is time being wasted, or are poor decisions being made, by staff who struggle to access the reports they need, when they need them?
- Would you like to improve both efficiency and data security by ensuring staff can easily launch and access reports that are relevant to their role, without being distracted by or having unauthorized access to those that aren't?



### Process Scheduler

- Do you rely on operations staff to manually kick off recurring processes (e.g. data integrity checks, backups, day end processing), and to ensure they complete without incident?
- Is your business being exposed to human error, performance degradation, resource conflicts and staff down time due to critical processes being manually executed during working hours?
- Would you appreciate the peace of mind and convenience of having key processes automatically scheduled, and the efficiency of having them run unattended during off-peak hours, while still being notified if something goes wrong.

## Operations Management



### Return Material Authorizations & Repair Tracking

- Do you need to manage the return and/or repair of physical products?
- Are your customers suffering from poor service, and are you losing money through excessive stock write-offs or unrecovered repair costs, due to poor item tracking and error-prone manual processes?
- What if you could track returns and repairs accurately, while improving customer service through consistent processes supported by configurable workflows, all from within Sage 300?



### Bin Tracking

- Do you need to track individual items against multiple bins within a Sage 300 Inventory Control location?
- How does it impact your customers when you can't locate an item to fulfil their order because you've lost track of exactly where all your inventory is?
- Rather than having to purchase, learn, maintain and reconcile a separate warehouse management system just to track multiple bins, wouldn't you like to do this from within Sage 300, while also supporting the use of handheld barcode scanners?

## Tailor your System & Integration



### Extender

- Do you have business or integration requirements that can't be met by 'out of the box' Sage 300 functionality?
- Are you shocked by high costs associated with software development and upgrades, or worried about adding complexity and risk by introducing solutions that sit outside your ERP system?
- Did you know there is now a cost-effective way to introduce bespoke business logic, from simple validations and alerts through to custom screens and tables, or integration with external applications, all held within your Sage 300 database?



### Optional Tables

- Do you store and maintain extra data outside of Sage 300 (e.g. KPIs, budgets)?
- Are you compromising decision making by holding key data externally, where it can't be readily shared or included in reports?
- Wouldn't you rather have custom, multi-dimensional data structures within your Sage 300 database, enabling better control and visibility, while also allowing you to view and manipulate data in Excel then write it back to Sage 300?



### Data Views

- Do you make use of Sage 300 Optional Fields?
- Are you struggling to incorporate Optional Fields and custom views into your reports?
- Did you know there is an easy way to create and maintain database views within Sage 300 that turn your Optional Fields into columns, simplifying report writing and making report running faster and more efficient?



Work *Smarter* with Orchid



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