

**Chat about and approve Sage 300 transactions in a mobile App**

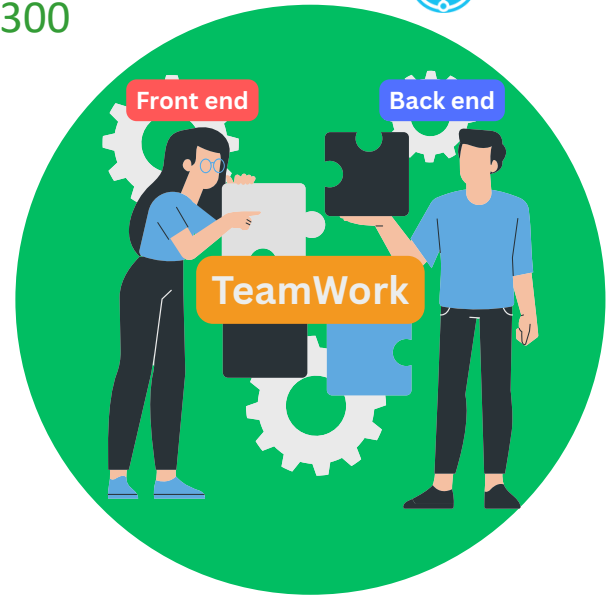


# TeamWork for Sage 300

Mobile, chat-based collaboration and management for Sage 300

## What is it?

**TeamWork for Sage 300** is an innovative collaboration solution designed specifically for the Sage 300 ERP system. It enhances teamwork and productivity by offering features such as chat communication, workflow management, approvals, alerts, notifications, status updates, discussions, notes, and document linking.



## TeamWork innovations for Sage 300 users

### Chat & Approve

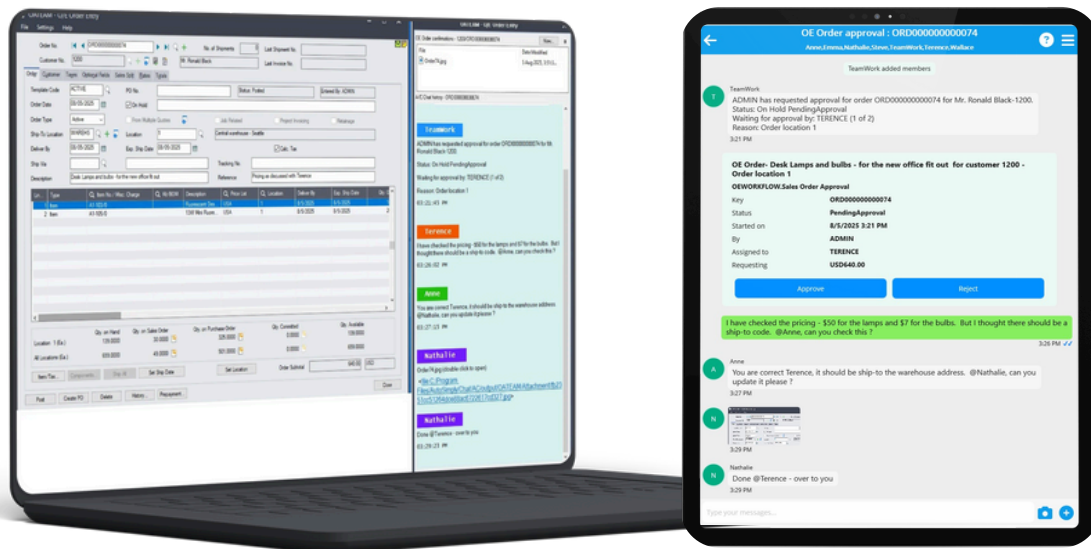
- Discuss and approve Sage 300 workflows instantly via **smartphone**. All relevant data and decisions are securely stored alongside the approval process, ensuring transparency.

### Mobile Apps User-Defined Inquires

- We could add “Unlimited user-defined inquires” in the mobile apps, providing approvers with relevant Sage information.

### Intuitive Workflow Setup

- By simply answering "**What, How, and Who**", you can configure workflows quickly and get started immediately.



### Pre-Set Sage 300 Workflows

- Choose from 25 (and counting) workflow templates, tailored to Sage 300, catering for common scenarios.
- Examples include approvals for: New Customers or Vendors, GL Batches, Customer Credit Limits, Purchase Requisitions, Internal Requests, Inventory Transfers, Discount Offers, and more.

## Mobile Action Platform

- Manage Sage 300 workflows and administrative tasks – including AI-powered expense claims, leave applications, and time tracking – all from a mobile platform.

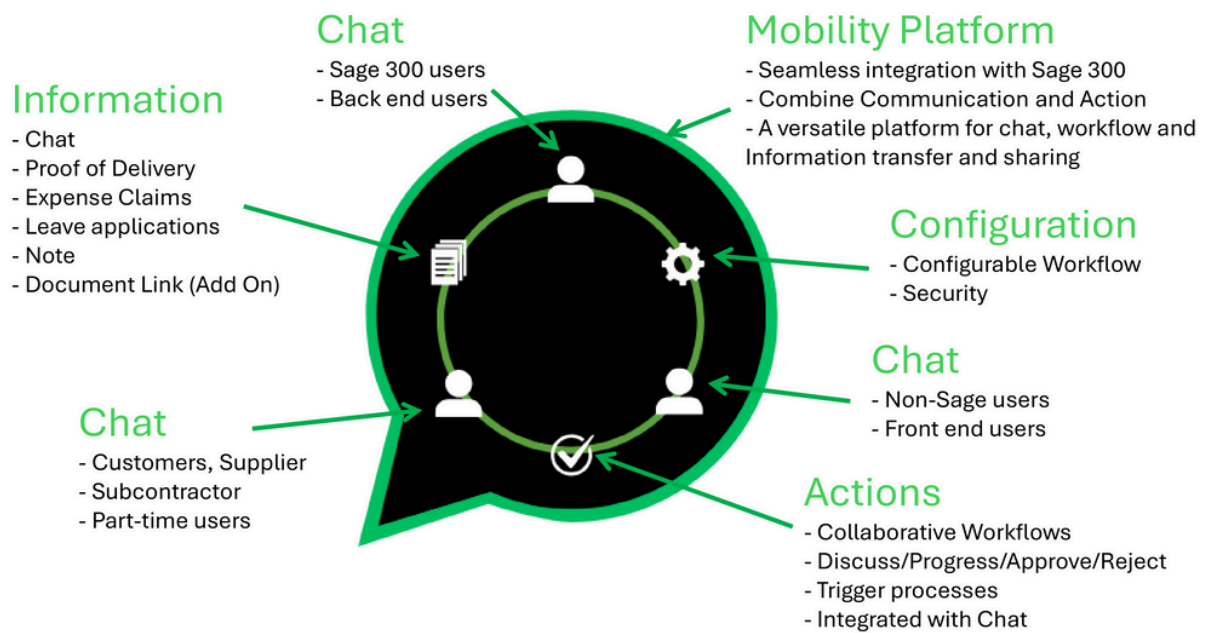
## Material Requisition Functionalities

- Sage 300 users can create internal usage requests, stock transfer requests, and purchase requisitions directly through the mobile app.

## Single Base Collaboration

- Centralize all chats, approvals, documents, and signatures for each business process. Everything is streamlined and securely stored within the Sage 300 database.

### TeamWork for Sage300



## What can TeamWork Do?

**TeamWork for Sage 300** is a powerful tool designed to streamline and enhance all aspects of Sage 300 and non-Sage transactions. It provides a highly configurable workflow engine, chat and approval templates, and customizable inquiries to fit various business needs. Below are some common usage scenarios for TeamWork:

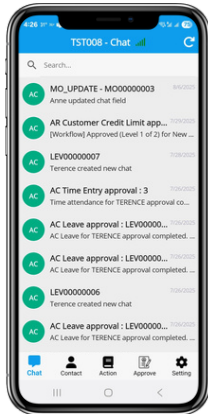
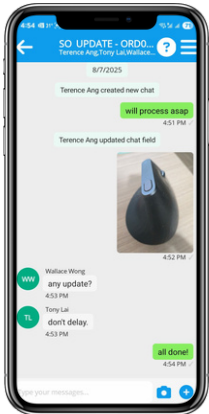
1. **New Customer Approval**
2. **Sales Order (SO) Approval**
3. **Manufacturing Order (MO) Approval**
4. **Purchase Request Approval**
5. **Purchase Order (PO) Approval**
6. **GL Batch Approval**
7. **AP Payment Batch Approval**
8. **Shipment Proof of Delivery (POD)**
9. **Internal Usage Approval**
10. More scenarios and examples coming soon!



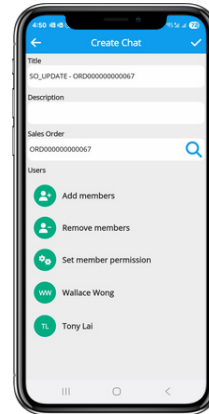
For detailed demonstrations and videos of these scenarios, please visit the official AutoSimply website: <https://www.autosimplify.com/demo/view/1>

# AutoSimply A/C Chat Functions in TeamWork

## Messaging/Chat Function

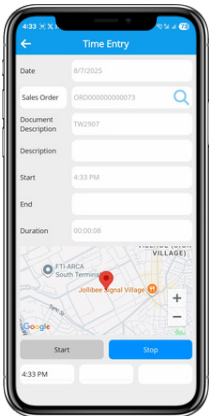


- Instant messaging between team members
- Real-time update of Sage 300 Optional Fields
- Send attachments and images
- Option for Signature capture to confirm transactions



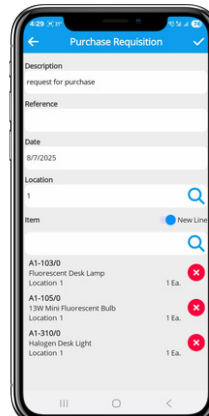
- Audit trail and history for chat messages and optional fields
- Record level security (e.g., Item, Customer, Templates)

## Time Entries by Frontline personnel



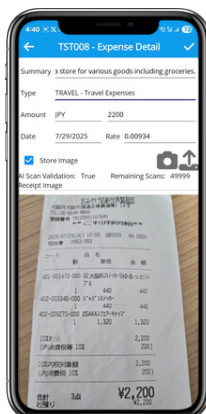
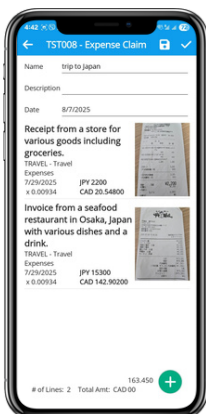
- Record time attendance with GPS
- Record time entries linked to Customer/SO with GPS
- Option for approval via chat interface

## Material Requisition by Frontline personnel

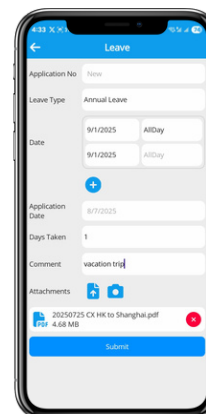


- Item transfer request with approval processing
- Internal usage request with approval processing
- Purchase request with approval processing

## Expense & Leave Application by Frontline personnel



- Apply for expense claims using AI scanning technology



- Apply for leaves via mobile devices
- Approval of applications via chat interface

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Google Play, Apple Store or Microsoft Store

