

Workflow & Notifications 2018 (6.5)

Workflow & Notifications provides an essential component for Sage 300 solutions. Organisations can now design & implement workflows that reflect their desired process management & authority controls. True workflows for Sage 300 have arrived!

Workflow & Notifications provides a powerful process management system from within Sage 300.

The building blocks are now available to manage the behaviour when changes to key data, setup or batch transactions occur.

Workflows

Modifications to many of the key views in Accpac can be captured and deferred from updating until the workflow process is concluded; once all the required approvals are granted then the updates are applied as originally intended.

Constraints can be applied to field values; these constraints are checked on any change to determine if the update is allowed to proceed or not, if not then possibly deferred to a workflow process seeking the appropriate approval.

Workflows on batch transactions can move declined transactions into a new batch for rework.

Notifications

Notifications are available on a wider range of views and send notifications to elected recipients at the time of the update.

Launching Macros from WN Events

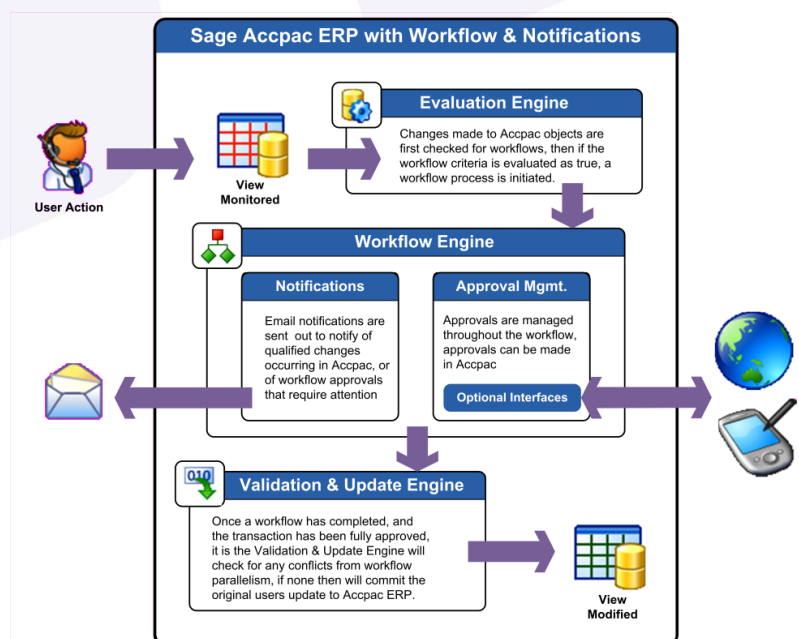
A powerful feature is the ability to launch an Accpac macro as a workflow step or as a notification event; with this capability it is now possible to deliver sophisticated solutions that meet complex customer requirements.

Web Approvals / Mobile Approvals

The Approval Console is a fundamental component of the solution where authorizers are presented with a list of documents where the relevant workflows are requesting their approval.

A Web based Approval Console (WAC) is available (an additional service) that allows simple & easy remote access by workflow approvers. Any approval actions via the Web-based Approval Console are negotiated with the client's on-premise Sage 300 implementation via the Internet.

Support for direct access from mobile devices is also available; an excellent solution for senior management mobile and on the move.



Batch-based Workflows

Batch-based workflows operate in a manner more appropriate to batch work. Users will create batch transactions as per normal including the batch checking; when the batch is requested to be set to Ready to Post, all transactions in the batch will then be evaluated for workflows.

If ensuing workflows are created, the batch assumes a new status of "Awaiting Approvals" and will be locked in this status until all of the issued workflows have completed.

Once all workflows have completed, the batch is ready for processing. In the case of AP Payments, any declined transactions can be removed from the batch, or optionally moved to a new batch in a similar manner to how error batches are created.

Availability & System Requirements

300 Editions: Standard, Advanced & Premium
 Database: Microsoft SQL Server

WNS4A - A/P Payment Batch List

Batch Number: 79 Show Posted and Deleted Batches

Batch Number	Batch Date	Description	No. of Entries	Total Amount	Ready To Post	Type	Status	Source Application	Printed	Posting S
53	14/08/2008		1	41.22	Yes	Entered	Ready To Post	AP	No	
55	14/08/2008		1	1,245.75	Yes	Entered	Ready To Post	AP	No	
56	14/08/2008		5	494.89	No	Entered	Open	AP	No	
67	18/08/2008		1	990.15	Yes	Entered	Ready To Post	AP	No	
70	18/08/2008		2	6,810.94	Yes	Entered	Ready To Post	AP	No	
71	18/08/2008		1	134.98	Yes	Entered	Ready To Post	AP	No	
72	18/08/2008		1	436.73	Yes	Entered	Ready To Post	AP	No	
75	19/08/2008		0	0.00	No	Entered	Open	AP	No	
76	19/08/2008	Yet another payment b...	2	89,171.90	Yes	Entered	Ready To Post	AP	No	
78	19/08/2008	More money outbound	2	1,065,219.76	Yes	Entered	Ready To Post	AP	No	
79	20/08/2008	Immediate Payments R...	1	7,859.24	Yes	Entered	Awaiting Approvals	AP	No	

Message dialog box:
 Message
 Description: Batch has been submitted for approval.
 Source: 15:56:22

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