



Pacifictch

# WORKFLOW DOCUMENTS

**WORKFLOW DOCUMENTS ENABLES ORGANISATIONS TO ATTACH FILES TO SELECTED TRANSACTIONS AND MASTERFILES, PROVIDING FAST ACCESS TO RELEVANT INFORMATION AND SUPPORTING MORE STREAMLINED WORKFLOWS & CONTINUOUS PROCESS IMPROVEMENTS.**

## Sage 300

**Advanced Document Attachment for Streamlined Approvals in Sage 300, Pacifictch Workflow Documents** is designed for organisations requiring multi-layered or structured approval paths.

The Workflow Documents module allows users to effortlessly attach supporting documents, ensuring quick, secure access to critical information at every stage of the workflow.

By embedding documents directly into the Sage 300 database (rather than linking to external sources), Workflow Documents ensures full data integrity, security, and accessibility—supporting faster approvals, better audit trails, and improved process efficiency.

### Main Benefits

- » Centralised Document access within Sage 300
- » Streamlined Approvals with embedded attachments
- » Enhanced Audit Tracking and process control
- » Improved collaboration with off-site approvers
- » Reduced IT complexity (no external file paths or drives required)

File Name	Description	Document Type
RapidGraphics_44_20.pdf	invoice copy	
Agreement.docx	please review	

Document Properties

Description  
Path  
Attached by

Buttons: Attach, Edit, Delete Attachment, Save, Submit, Delete, Funds Availability..., Close

**BUILDING ON  
BUSINESS  
PERFORMANCE**



Pacifictch

When used in conjunction with **Purchasing Workflow, Payables Workflow and Workflow & Notifications, Workflow Documents** creates a centralized approval and auditing system. All supporting documentation can be reviewed and approved as part of the same process—within a single, integrated interface.

### Technical Document Embedding

Unlike systems that link to external files, Pacifictch Workflow Documents embeds attachments directly into the Sage 300 database.

- » Drive mapping issues or access restrictions
- » VPN dependencies for remote users
- » Loss or modification of source documents

This embedded model ensures the longevity and integrity of your documentation—critical for compliance, auditing, and remote collaboration.

### AVAILABILITY & SYSTEM REQUIREMENTS

300 Editions:  
**Standard, Advanced and Premium**

Databases:  
**Microsoft SQL Server**

Languages:  
**English, Spanish & French**

Integrated Modules:

- » **PURCHASING WORKFLOW**
- » **PAYABLES WORKFLOW**
- » **WORKFLOW & NOTIFICATIONS**

### Seamless Sage 300 Integration

Fully integrated with the standard Sage 300 interface, Workflow Documents is intuitive to use and requires minimal training. Users can view, manage, and approve documents from within the same transaction or Masterfile screen.

Documents can also be included in notification emails, enabling off-site users to open and review attachments directly from within the approval message—streamlining collaboration and decision-making.

**Pacifictch Workflow Documents is a powerful tool for organisations needing a secure, efficient and compliant method to manage documentation within their Sage 300 approval processes.**



Pacifictch has a long and successful history as a Sage ISV Development Partner, developing solutions that enhance the functionality and capability of Sage 300.

Pacifictch is a Sage Intacct MPP and delivers innovative solutions for Sage Intacct.

Visit our website [www.pacifictchsol.com](http://www.pacifictchsol.com) for further information on products and services that Pacifictch provides to the Sage communities around the world.

**Sage Tech Partner**

**Tech Partner of the Year** – Sage Australia/Pacific 2024

**Top Revenue Tech Partner** – Sage Africa/ME 2022

**Top Development Partner** – Sage Australia/Pacific 2021 | 2020 | 2015 | 2014

**Sage Global Development Partner of the Year** – 2009

**Top Development Partner** – Sage Asia 2008