



# Productivity Tools for Acumatica

POWERED BY SINGLE SOURCE SYSTEMS

Enhance the power and user experience of Acumatica with Productivity Tools from Single Source Systems. Offered as a full product suite or as individual modules, this product gives Acumatica users of every industry edition additional functionality needed to meet business requirements and improve efficiencies.

## AGREEMENT DESIGNER

Scope of work, Service Level Agreements, Purchasing or Delivery Compliance language, Change Order Agreements, Disclaimers & Warranties, can all be developed and rendered with embedded data from supported document types within Acumatica.

Embed legal or contractual text with data extracted from supported Acumatica document types

Create the content once and re-use multiple times with re-useable templates

Create unlimited templates and attach unlimited agreements

Supports Projects, Subcontracts, Sales, Service, and Purchase Orders and other Acumatica document types

The screenshot displays the 'Agreement Designer' interface in Acumatica. The top navigation bar includes a search field, a refresh icon, and user information for 'Marty Rhodes' on '5/20/2022 3:46 PM'. The main content area is titled 'Agreement Templates: CHGORDER - CHANGE ORDER: STANDARD TEMPLATE'. It features a left sidebar with navigation icons for Favorites, Dashboards, Data View, SPS Productivity Tools, Project Management, Marketing, Opportunities, Time and Expenses, Finance, Banking, Compliance, Payables, and Receivables. The main panel shows template details: Template ID (CHGORDER - CHANGE OF), Description (CHANGE ORDER: STANDAR), Valid For (Change Orders), and Filename (CO-{{Document RefNbr}}.doc). There are checkboxes for 'Active' and 'Print Lines'. Below this is a 'SECTIONS' tab with a table listing various sections:

Section Type	Seq	Section ID	Page Break	Override Std	Print Descript	Description	Note HTML
Header	10	CHGORDINTRO	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Change Order Introduction	<HTML...
Header	20	SOWINTENT	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Objective	<HTML...
Header	30	SOWSCOPE	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Scope of Work	<HTML...
Header	40	SOWCHANGE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Change Control Process	<HTML...
Header	50	HRSFEEES	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Service Hours and Rates	<HTML...
Footer	60	DEPREQD	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Deposit Requirements	<HTML...
Footer	70	PMTERMS	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Payment Terms	<HTML...
Footer	80	SIGNATIRF	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Client Signature	<HTML...

At the bottom, there is a rich text editor with a 'VISUAL' toolbar and a preview of the agreement text: 'This is a firm and materials services Change Order ("CO") and is subject to all terms and conditions of the Services Agreement ("SA") between Company ("Company"), and Client with an Effective Date of P(PSAData). All terms of the SA are incorporated herein by this reference. Capitalized terms not defined in this CO are defined in the SA. In the event of a conflict, the terms of this CO control over the terms of the SA.'

Build lists of unlimited questions that support multiple data type responses

Group and sequence questions and assemble them into re-useable templates

Create inspections, surveys, punch lists, or checklists for any part of the business

Associate and attached the survey or inspection to Projects, Service, Purchase, Production Orders, and other Acumatica document types

Deploy the questionnaire via mobile for field-based data collection

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## QUESTIONNAIRE DESIGNER

Inspections, Punch Lists, Surveys, Checklists, Evaluations. Any time a list of questions is needed to capture data, it can be done with the Questionnaire Designer. These too can be rendered with embedded data from supported document types within Acumatica. Capture answers and results at the desktop and on a mobile device as well!

Step Code	Group Seq	Seq	Type	Required	Description	Allow Comment	Default	Decimals	Min	Max	Warn Min	Warn Max	SkipValue
0	10	10	Header	<input checked="" type="checkbox"/>	General Information	<input type="checkbox"/>		2					
0	10	20	Textbox	<input checked="" type="checkbox"/>	Model Number	<input type="checkbox"/>		2					
0	10	30	Textbox	<input checked="" type="checkbox"/>	Serial Number	<input type="checkbox"/>		2					
0	10	40	Dropdown	<input checked="" type="checkbox"/>	Battery Type	<input type="checkbox"/>		2					
0	10	50	Numeric	<input checked="" type="checkbox"/>	Cell Count	<input type="checkbox"/>		0					
0	20	10	Header	<input checked="" type="checkbox"/>	Input/Output	<input type="checkbox"/>		2					
0	20	20	Radioset	<input checked="" type="checkbox"/>	Input Voltage	<input type="checkbox"/>		2					
0	20	30	Radioset	<input checked="" type="checkbox"/>	Input Frequency	<input type="checkbox"/>		2					
0	20	40	Radioset	<input checked="" type="checkbox"/>	Input Amps	<input type="checkbox"/>		2					
0	25	10	Radioset	<input checked="" type="checkbox"/>	Output Amps	<input type="checkbox"/>		2					
0	25	20	Numeric	<input checked="" type="checkbox"/>	Output Power (VA)	<input type="checkbox"/>		2					
0	25	30	Radioset	<input checked="" type="checkbox"/>	Waveform	<input type="checkbox"/>		2					
0	30	10	Header	<input type="checkbox"/>	Overview/Cleaning	<input type="checkbox"/>		2					
0	30	20	Checkbox	<input checked="" type="checkbox"/>	No Visual Damage	<input type="checkbox"/>		2					
0	30	30	Checkbox	<input checked="" type="checkbox"/>	Clean Body	<input type="checkbox"/>		2					

Since 1985, Single Source Systems has been a thought leader in the service industry. Our specialty is helping service companies implement software solutions and industry best practices. Today, we specialize in implementing a cloud-based ERP software, Acumatica. When companies run their businesses in the connected cloud, they can easily share data between the office and the field. This allows for smart, strategic decisions that drive the business forward towards profitable growth.