



PRODUCTIVITY TOOLS FAQ

Single Source Systems Productivity Tools help address common issues Acumatica users face day-to-day. Here are some common questions we hear from prospects, along with answers.

Q: What kind of documents can I create with the Agreement Designer

A: Our customers use the Agreement Designer for a wide variety of documents. Here are a few...

- Opportunities
- Project Definitions
- Sales / Service / Project Quotes
- Documents w/disclaimer or warranty language
- Sales / Service Orders
- Statements of Work
- Contracts
- Vendor POs
- Compliance documents
- Service Contracts
- Shipping policies
- Change Orders
- Return policies

Q: What kinds of documents can I create with the Questionnaire Designer?

A: Here are few examples...

- Sales Discovery Checklist
- Quote Review Checklist
- Employee Onboarding Checklist
- Questionnaire for inbound call triage

- Site Inspection / Survey / Punchlist
- Start/End of Day Startup/Shutdown Procedure
- Field Service Inspection /Calibration Reports
- Mfg Production In-process Quality Inspection
- Receiving / Shipping Checklist

Q: What Acumatica Document Types are supported by the Agreement Designer?

A:The Agreement Designer supports the following Acumatica documents...

- Change Orders
- Customer Contracts
- Opportunities
- Projects / Quotes
- Purchase Orders
- Sales Orders / Quotes
- Service Contracts
- Service Orders

Q. What type of documents are supported by the Questionnaire Designer?

A. Questionnaire Designer supports the following Acumatica documents...

- Cases
- Employees
- Projects / Tasks
- Purchase Orders / Receipts
- Production Orders / Details
- Service Orders
- Opportunities





PRODUCTIVITY TOOLS FAQ (CONTINUED)

Q: What do I do if I need a Document Type that is not supported?

A: Just call Single Source. If you identify a document that is generally applicable to other customers, we'll add it to the standard product at no charge.

Q: What versions of Acumatica do you support?

A: We support the current version and versions that are up to two years old.

Q: How long does it take to implement and start using?

A: Both products only require about two hours of training each. We have online tutorials as well as embedded Help text in the standard Acumatica Help Wiki to assist with your education and use of the product.

Q: What if I need additional assistance or have some advanced formatting that I need for an Agreement or Questionnaire?

A: Single Source Systems offers professional service assistance for more in-depth training or assistance with the development of an agreement or questionnaire document for an hourly fee. We'll be happy to provide an estimate.

Q: Can I embed a custom data field that our company has added to the Acumatica database?

A: If your custom data field has been added to one of the supported Document Types listed above, then YES, you can embed that data in the output of either of the tools.

Q: How are the Productivity Tools packaged and priced?

A: Pricing is based on the Acumatica Edition used by your organization (Small Business, Advanced, Enterprise). The Productivity Tools are offered in a bundle – you get both the Agreement Designer and the Questionnaire Designer in a single suite offering – your best value! (However, you can license the products individually as well).

Q: How is the software installed?

A: Since the Productivity Tools were developed using the Acumatica xRP architecture, we deliver you a Customization Project that you can install yourself (or with the aid of your partner). It only takes a few minutes.

Q: What if I have a product question or I think there is bug?

A: Your annual subscription fee includes product support. Just submit a support request to Success@singlesrc.com and a support representative will contact you.



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