

Agreement Designer helps Acumatica user close sales

Revive ERP offers cloud-based financial management solutions and services, specializing in project-based professional service, construction, and field service industries. In addition to selling Acumatica ERP, Revive ERP uses Acumatica ERP for managing its own business. The company also relies on Agreement Designer, a productivity tool from Single Source Systems which streamlines the creation of customer contracts, such as Statements of Work, Master service, and Support Agreements. The add-on tool integrates seamlessly with Acumatica and has been a valuable timesaver, according to Revive ERP principal, Jason Leveson.



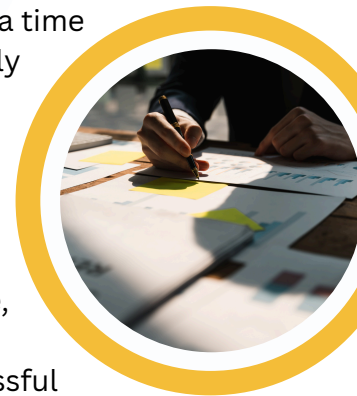
Revive ERP offers cloud-based financial management solutions and services

Headquartered in Indianapolis, Indiana, Revive ERP is a mid-sized organization focusing on growth. With a recent merger, it has expanded into Canada, prompting the need to examine internal processes and find opportunities to boost productivity. The multiple tedious steps in quoting and creating agreements was identified as a chokepoint that was slowing the close of sales. "We wanted to add more velocity to our sales process. Our growth was forcing us to adopt smarter and more efficient processes to close deals and transition them to services faster," says Jason Leveson, Revive ERP Principal

Standardizing and Streamlining

Agreement Designer is a productivity tool from Single Source Systems, a solution provider offering solutions and professional services for nearly 40 years. Single Source developed the Agreement Designer especially for Acumatica after observing that creating agreements was a time drain for many users, especially those offering services.

"For companies providing a service, their binding agreements must be very specific in defining the service, how it will be delivered and methods for measuring successful completion," says Marty Rhodes, President of Single Source Systems. "Services are sometimes nebulous things that take many words to define. So, the paperwork process can be long and tedious. We set out to make it easier."



Agreement Designer allows users to create standardized wording for legal documents that can be templated and used limitlessly. There's no need to re-draft wording for every new document. Paragraphs or phrases can be saved as elements and easily incorporated into the new document, saving time, and improving consistency and accuracy of content.

Leveson is largely responsible for creating the sales agreements for Revive ERP. He explains that contracting with a new customer typically requires three documents: a Statement of Work, a Master Services Agreement, and a Subscription





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agreement. The three documents can extend to 50 pages. Agreement Designer has improved the entire process. “Historically, it used to take me sometimes a full day, if not even two or three days, to put our agreements together. Now, with Agreement Designer, what used to take up to three days, is now a half hour, max,” says Leveson.

Agreement Designer reduces time spent on documents from three days to thirty minutes.

Agreement Designer saves time by incorporating modules and standardized sections so agreements can reuse common terms, conditions, definitions, and descriptions. The user can select from a library of standard templates and easily tailor a few points. There’s no need to redraft text that has already been carefully worded, edited and, if needed, approved by the executive or legal team. That work only needs to be done once.

“It took us some trial and error to decide the best way to standardize our documents, but once we settled on our sections and the best way to restructure our documents, we were able to drastically cut the time it takes to close a sale,” says Leveson.

Improved Efficiency and Accuracy

In addition to being faster, the new process is also more accurate, he adds. The documents can be searched and it’s easy to verify all of the dates and names are

updated and accurate. Proofreading time is drastically cut.

The improved efficiency also contributes to the faster close of sales and transition to the services team, Leveson, believes. “As soon as we hold a scoping call, I can turn around, jump in Acumatica, tailor the details, and print out our agreements immediately,” Leveson says. This takes advantage of the momentum generated through the scoping call and keeps the interest level high. “Because the information is fresh in their mind, they tend to sign the agreements much faster. In the past, if I took a few days to send the agreement, they also took a few days to sign it. We had a lot of lost time,” Leveson says.

Time is money

“Now, we’re not just shaving time off creating agreements, we’re increasing the close of sales. We’re cutting the process by two-thirds,” says Leveson.

This is especially helpful at the end of the month. Prospects tend to wait until the last minute to accept an offer, creating a rush of paperwork to be completed, says Leveson. “In the past, it wasn’t always possible to get every deal to close at the end of month. Now, I can close four deals in a single day.”

Additionally, because the license order, the service and support agreements are all together, implementation can begin much faster. The project moves seamlessly from the sales team to services, with everyone sharing the same vision of the project scope, scale, and priorities. “We can do a project kickoff two weeks earlier because



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agreements are all in place. That means we can bill two weeks earlier, too,” says Leveson.

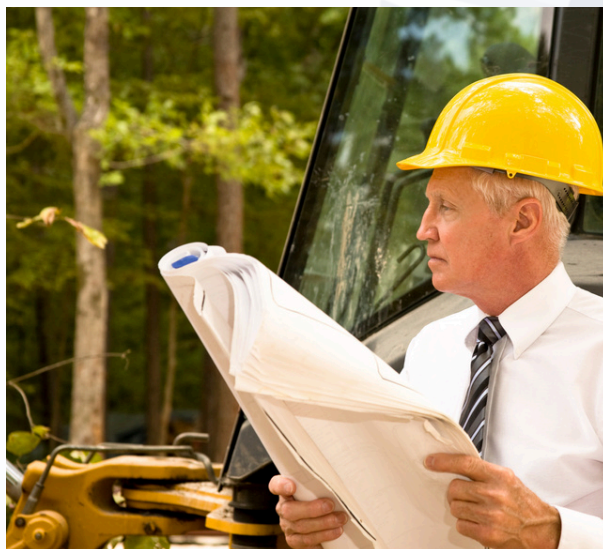
In addition to sales, the customer success managers are using Agreement Designer for support agreements and Account Managers are using it for add-on and expansion sales, too, he adds.

Revive ERP also sells Agreement Designer

Single Source Systems is part of the Acumatica licensed channel partner community, meaning other Acumatica channel partners, like Revive ERP, can sell their Productivity Tools.

Since Revive ERP works with clients in the professional services business, like architects and engineers, the clients see the value of the solution. Leveson says 30% of the pipeline has Agreement Designer included in their initial quotes and the other 70% plan on adding the solution in a future phase.

“We've won deals by showing clients our usage of Agreement Designer,” says Leveson. “We demonstrate how we are tracking their opportunity in our



environment and then show them how that links to the Agreement Designer. Prospects say, ‘We want that.’ And we’re happy to say it’s available for them.”

Learn more about Productivity Tools

Agreement Designer is one of the Productivity tools offered by Single Source Systems for Acumatica users. Questionnaire Designer, for streamlining checklists, is another tool Acumatica users will find helpful.

Visit [Singlesrc.com/productivity-tools](https://singlesrc.com/productivity-tools).

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