

Powerful Annotation Tools – Go Digital, Streamline Review and Responses

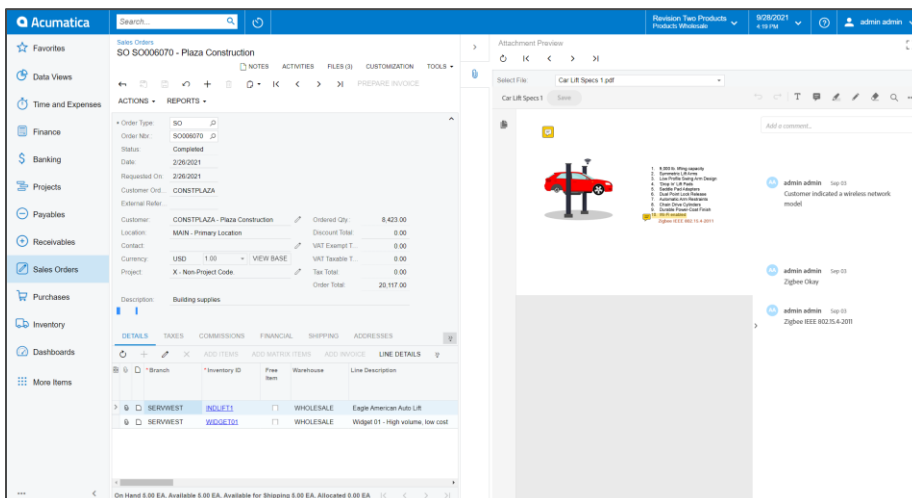
Acumatica’s customization for PDF Annotator simplifies and optimizes document management by enabling users to quickly markup, update, or change any PDF attachment within Acumatica. Simply access the record, open the attachment in the side panel and mark up your changes. Users can modify quotes, invoices, statements of work, and more. PDF Annotator automatically saves all changes and maintains a complete audit trail.

ENHANCE COMMUNICATION AND COLLABORATION

- Empower staff with an intuitive tool that enables them to relay important information or changes in real-time when they open the record and PDF file.
- Gain efficiency by eliminating the need to download, save, and upload PDF attachments.
- Respond to requests immediately by opening and editing files alongside the corresponding record.
- Drive consistent communications by enabling everyone to see the same record and edited PDF attachments in real-time.

REDUCE ERRORS WITH AUDITABLE PDF HISTORY

- Maintain document integrity by enabling everyone to work with the same attached documents.
- Enhance version control by preventing users from simultaneously editing the same PDF attachment and documenting edit history.
- Automate version control; create and preview a complete audit trail of document changes (by users).
- Enhance and edit content on a PDF attachment without switching applications.



Acumatica PDF Annotator displays the quote and edits on the right-side panel.

KEY BENEFITS

EASY NAVIGATION

- Access and edit documents on one screen for uniform high-fidelity viewing
- View and navigate a record’s multiple PDF files quickly and easily on the screen side panel

REAL-TIME ANNOTATION

- Mark up PDF attachments easily with sticky notes, comment boxes, highlighting, and even free-form sketches
- Instantly search and find key data within a PDF file

RIGOROUS VERSION CONTROL

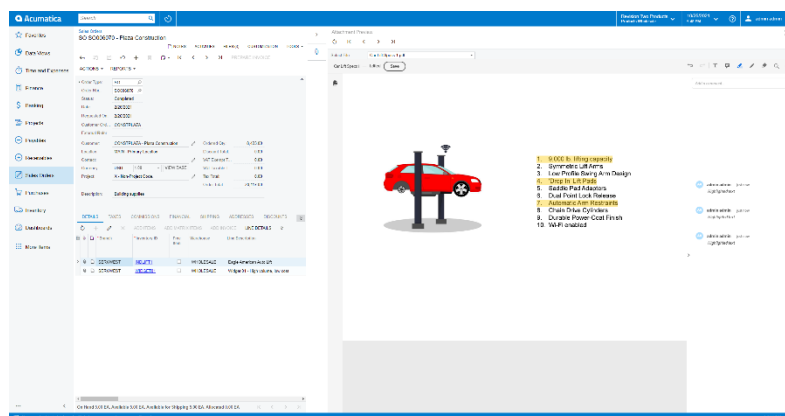
- Automatically save all annotations made to PDF files and keep them aligned to the corresponding record
- Maintain full audit history of document changes for easy viewing

EFFICIENT COLLABORATION

- Facilitate easy collaboration among users by enabling them to view records and attachments
- Allow users to work together by providing immediate access to revised records and changes made to PDF attachments

PDF ANNOTATOR FEATURES AND CAPABILITIES

Intuitive Editing Tools	Make adjustments to PDF files in various ways, such as adding sticky notes, highlighting text, and inserting a comment, and even drawing on the document.
Undo Option	Undo or cancel recent changes during an editing session.
Single Source of the Truth	Limit edits to any PDF attachment to one user at a time to prevent multiple users from simultaneously changing the document.
Version Control	Once users save their changes, the system automatically keeps a record of the changes and attaches a new version of the document to the original record.
Audit History	Maintains a history of changes to the PDF file along with the user, date, and time each change was made.
Document Management and Integrity	Retains integrity of the original content. Allows users to edit or mark up the PDF without deleting the original, providing context for all users to understand the document's history.
Flexible Document Saving	Allows users to download and print PDF files at any time.
In Application Support	Enables users to work on PDFs without leaving having to leave the Acumatica application.
Mobile Support	Delivers the same user experience on a mobile device, allowing users to access and edit documents with the same tools and interface.



Users can highlight text and add notes directly on the estimate with Acumatica PDF Annotator.

ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations.

Business Resilience. Delivered.

Contact us today to get started: [888-228-8300](tel:888-228-8300) | [acumatica.com](https://www.acumatica.com)