



Customization for PDF Annotator

Annotate PDF documents from inside Acumatica. PDF notes are useful for collaborating on quotes, contracts, and other documents where additional information is needed for multiple users.

- **Annotate PDF documents from inside Acumatica**
- **Mark-up documents with sticky notes, comments, or highlights**
- **Save PDF annotations with a full audit history**

Key business benefits

- Access and edit documents on one screen for uniform viewing.
- View and navigate PDF files on a screen side panel.
- Mark up PDF attachments with notes, comments, highlighting, and free-form sketches.
- Auto save all annotations made to PDF files and keep them aligned to the corresponding record.
- Maintain full audit history of document changes.
- Collaborate with users by enabling access to records and attachments.

Related resources

- 5 Ways Acumatica Simplifies Item Management > [LEARN MORE](#)
- Prepare for the Warehouse of the Future > [LEARN MORE](#)
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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. You can modify quotes, statements of work, and more. PDF Annotator automatically saves changes with a complete audit trail.

ENHANCE COMMUNICATION AND COLLABORATION

- Empower staff with an intuitive tool that enables them to relay valuable information or changes in real-time when they open the record and PDF file.
- Eliminate 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.
- Automate version control; create and preview a complete audit trail of document changes (by users).
- Improve version control by preventing users from simultaneously editing the same PDF attachment and documenting edit history.
- Enhance and edit content on a PDF attachment without switching applications.

“We’re virtually paperless...The ability to add notes to invoices and other paperwork was massive. I can’t tell you how excited my staff is about the notes they can put in the system everywhere.”

—Jo Young, Managing Director, Additive-X

> CUSTOMER STORIES

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

Maintain a history of changes to the PDF file along with the user, date, and time each change was made.

Document Management and Integrity

Retain 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

Allow users to download and print PDF files at any time.

In Application Support

Enable users to work on PDFs without having to leave the Acumatica application.

Mobile Support

Deliver the same user experience on a mobile device, allowing users to access and edit documents with the same tools and interface.

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.

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ABOUT DSD BUSINESS SYSTEMS

Founded in 1984 in San Diego, DSD Business Systems is an award-winning cloud accounting, ERP, CRM, HR and custom development technology partner with 45 offices throughout North America. As a Gold Acumatica Partner, DSD is recognized annually by Accounting Technology Magazine as a Technology Pacesetter, as well as a Top 100 VAR Firm by both Bob Scott's Insights and Accounting Today.

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