



# Productivity Tools

## for Infor CloudSuite Field Service

### Extending the Functionality of Infor CSFS

Productivity Tools, created by Single Source Systems, Inc., increases the value of Infor CloudSuite Field Service (CSFS), providing efficiency-enhancing solutions to match your company's unique needs. For CSFS 4.20 and higher, Productivity Tools includes several enhancements designed to improve the user experience and the system administrator's efficiency.

### Background Email Queue Setup

Simplify the administration and maintenance of all your background jobs. Our *Background Email Queue Setup* screen and *Email Task Maintenance* screen allow administrators to easily view which reports are running and to manage the users receiving those reports.

### Record Cap Utility

Tired of changing your record cap setting every time you log in to standard CSFS? Ever had to search for a record beyond the 200 records initially displayed? With our *Record Cap Utility*, you can increase and set records caps and dropdown limits by group or by specific user.

### System Information

Want an easier way to view the various system information scattered across CSFS and SQL servers? Productivity Tools offers a set of forms to bring everything together for administrators to have better insight into those details, including *Background Task Information*, *Server Information*, *SQL Jobs*, and *Table Information*.

### CRM Dashboard

This one dashboard shows all of your opportunities and leads. In one screen, you can view, sort, and export your customer contracts, service orders, sales orders, and contracts. Sales team members can use the *New Lead* and *New Opp* buttons to quickly open the *Leads* and *Opportunities* screens. Additional features within the CRM Dashboard include:

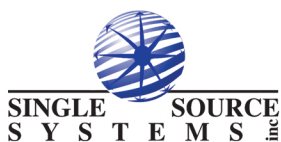
- Partner Analysis* - This screen allows managers to quickly review each partner's productivity in hours worked and billed.
- Project Status Reporting* - This tool lets your project managers easily maintain and manage multiple SROs for one project.
- Alternate Standard Reports* - This option improves the output of Order and Invoicing-related print outs.
- Formatted Emails* - Lets users improve the output of emails created with the Customer Document Profiles.
- Process Flows and Overview Forms* - Shows detailed steps for various processes in CSFS to help new and veteran users alike.

### Critical Numbers Dashboard

This dashboard is an organized view that makes it easy to track all your KPIs and their change over time in one place.

### Improvements to Customer Deposits

We've made it easier to invoice a deposit to the customer, manage the receipt of payment, and apply the deposit without the work-arounds currently needed.



### About Single Source Systems, Inc.

Founded in 1985, we are a systems integration and technology consulting firm, providing solutions in the areas of ERP, CRM, Business Intelligence, and Enterprise Asset Management. We specialize in solving company problems by creating solutions with technology and business processes.