

Accounting Interface



Partner Accounting Interface Addendum

Configuration and Support Scope Document

Version 4.28

The purpose of this document is to define and distinguish between configuration and support items that are included and those that are excluded from the work necessary to configure an interface to a standard accounting system in association with an installation of the Partner Field Design Application. Excluded or "custom" items incur an additional cost and may require a separate service order.

Support & Configuration Included

- Installation and configuration of MultiSpeak® Accounting Module.
- Creation of a document containing the endpoint URL's and field mappings to be shared between the accounting system, Partner, and customer.
- Configuration of Partner Unit Accounting Codes for export to the accounting system.
- Configuration of Job level header fields (and related picklists) specific to the accounting system.
- Test import of MultiSpeak® xml Work Order Change Notification for creating or updating jobs in the Partner database. (not available for "export only" interfaces)
- Test export of MultiSpeak® xml Staked Work Order Notification for updating job header and assembly information back to the accounting system.

Support & Configuration Excluded

This list is an overview and cannot account for every possible custom configuration request. In general, anything out of the scope of the configuration included in the purchase of the software may incur an additional fee.

- Unit configuration other than Accounting Codes, including categories, features, or other data fields used for statistical analysis or accounting functions other than inventory.
- Auto-population of design variables, or "ref1/ref2" codes, in the Field Design for the purpose of updating to the accounting system.
- Auto-populating unit categories for the purpose of exporting statistical data.
- Configuration of minor material with the purpose of updating these data to the accounting system. Current interface only exports Construction Assemblies—no materials.
- Substantial configuration requests more than sixty (60) days after the initial installation of the accounting interface may require an additional fee.

Customer Responsibilities

Before the Accounting Interface can be built, the customer is responsible for supplying the following:

- List of Construction Units for configuring Accounting Codes; and
- Job Header information, such as picklist data (staker names/codes, loan project numbers and years, etc.) for configuration with the purpose of updating this information to the accounting system.

Please contact Partner Software with any custom design or configuration requests that are out of the scope of our standard Field Design Application installation and we will assist you with pricing and information.