

ACCTivate! Key Features

Inventory management

- > Complete historical transaction ledger by product
- > Multiple units of measure
- > Custom fields
- > Average, standard, LIFO, FIFO and actual costing
- > Landed cost
- > Establish cost budget
- > Assemblies
- > Batch process manufacturing
- > Variable build assembly
- > Matrix inventory/assortments
- > Discontinued stock management
- > Product metrics (weight, volume & dimensions)
- > Lot & serial numbers
- > Categorize raw materials, WIP, finished goods
- > Comprehensive physical count
- > Cycle counting
- > Wide variety of product data
- > Max/min order levels
- > Consignment inventory
- > Product search via 15 attributes
- > Mobile inventory management
- > Keyword lookup
- > Link to external documents
- > Store product image/photos

Purchasing

- > Purchase requests
- > Request for quote
- > Purchase order management
- > Drop ship purchase wizard
- > Pricing controls
- > Replenishment forecasting
- > Vendor management
- > Automatic AP invoice creation
- > Pop-up reminders to request vendor specials
- > PO approval capture
- > Email PO to vendor
- > Multiple vendors per product
- > Vendor price discount

Picking & shipping

- > Pick route optimization
- > Mobile order picking
- > User defined picking zones
- > Kitting
- > Bill of lading creation
- > Shipment scheduling
- > FedEx, UPS & DHL integration
- > Shipping label generation
- > Shipment tracking

Warehousing

- > Multiple warehouses (physical or virtual)
- > Location management within warehouses (bin management)
- > Extensive receiving capabilities
- > Mobile inventory receiving
- > Bar code creation & printing
- > Catch-weight receiving
- > Blind receiving
- > Inventory moves & transfers
- > Warehouse zoning

Sales order management

- > Formal quotations with conversion to sales order at acceptance
- > "Quick Quote" for customer price inquiries
- > Manage multiple branches
- > Counter sales
- > Route management
- > Mobile route delivery
- > Mobile sales orders
- > eCommerce integration
- > Automatic credit check
- > Credit card processing
- > Multiple pricing options
- > Customer/product price/discount matrix
- > Line and/or invoice discount
- > RMA with credit memo creation
- > Shipping instructions per order
- > Quantity break pricing/discounts
- > Pop-up reminders for cross-selling
- > Multiple ship to locations
- > Booked orders for future scheduling

Service management

- > Service scheduling
- > Automated creation of service orders
- > Labor & materials capture
- > Invoice service orders individually or in batches
- > Graphically view & track service activities
- > Service tech communication
- > Service billing
- > Capture billable & non-billable hours
- > Link service call occurrences to customer history
- > Service call completion & follow-up emails to customers

CRM

- > Mail list management
- > Sales lead tracking
- > Sales cycle management
- > Mobile sales orders
- > Broad customer data access
- > Multiple contacts per customer
- > Extensive customer information
- > Contact history & notes
- > Customer order status & history
- > Sales and payment history
- > Follow-up reminders
- > Customer issue tracking
- > Overdue invoice management
- > Customer self service
- > Broadcast emails
- > eMail history
- > Mobile access to information
- > Pipeline analysis
- > Integrated with business operations & accounts receivable

EDI

- > Receive POs from trading partner
- > Sales order is automatically created
- > Shipments are automatically prepared by Wizard
- > Automatically prepares UCC 128 labels
- > FedEx/UPS shipping labels automatically print with pre-determined weights from database
- > Automatically prepare invoices
- > Automatically sends ASN & invoice transactions to Trading Partner

Reporting

- > Over 75 standard reports
- > Unlimited custom reports utilizing Crystal Reports®
- > Drill down & drill around information access

Foundation

- > Business activity management
- > Alerts of items requiring action
- > Notes throughout system
- > Scheduling & collaboration
- > Assign tasks to employees
- > Extensive, configurable security
- > Industry-standard components such as Microsoft® SQL

Integrated with QuickBooks® since 2003



* Some features are optional