

AP Tech Group

Industry

Solid chemistry water treatment products manufacturer

Key Features

Order Fulfillment
Lot & Serial Number Traceability
Inventory Control
Process Manufacturing
Reporting

Challenge

Error-prone management of growing inventory via spreadsheets separated from the financial side.

Solution

Comprehensive inventory and business functionality + visibility connected with QuickBooks and designed for growth.

Results

Real-time, accurate, and accessible data to keep all staff and customers informed and satisfied.

AP Tech Group is the global leader in solid water treatment products for industrial cooling and heating equipment to prevent scale corrosion and disease. While the industry standard is liquid, AP Tech Group produces a solid product that greatly reduces shipping costs, promotes safety and environmental sustainability, and supports easy application.

“Acctivate added a lot of credibility for our business. Acctivate has given us greater visibility.”

Trey Tolbert, Operations Coordinator

Challenge

AP Tech Group finds spreadsheets incapable of handling demand

With a product that plays such a big part in maintaining complex and valuable equipment the need arose for AP Tech Group to manage inventory and order fulfillment in a more efficient manner as SKUs grew.

“Before Acctivate, we had been using QuickBooks for financials, which was a fit and still is. The problem was we were running all of our inventory through it with a spreadsheet. As our SKUs continued to grow, altering the spreadsheet became a pain, and it provided very little reporting or visibility,” Trey Tolbert, Operations Coordinator said.

After looking at multiple solutions, AP Tech Group decided on Acctivate to help manage operations and integrate with their existing QuickBooks Premier.

“What we liked about Acctivate and why we chose Acctivate was its modular design. We were able to add what we needed at the time, and it could grow with us as we grew; and the price reflected that,” Tolbert continued.

Solution

With QuickBooks already in place, AP Tech Group had a streamlined start with Acctivate

Acctivate also allowed AP Tech Group to stick with QuickBooks, which Tolbert described as a significant benefit of Acctivate.

“Integrating with QuickBooks has been a tremendous value. That’s just another piece of software that somebody else would’ve had to retrain on. It kept the familiarity that we had with what we were doing, and just added a layer on top.”

AP Tech Group experienced immediate benefits after adding Acctivate

After implementing Acctivate in April 2020, ROI was quickly realized coming from the limited ability to manage inventory and other operations via spreadsheets and QuickBooks.

“Acctivate added a lot of credibility for our business. Our salespeople are more informed when customers call about something like product availability. There is a customer satisfaction aspect that has been greatly improved.”



Lot & Serial Number Management

With Acctivate, AP Tech Group tracks serial numbers for their equipment line and lots for their chemical products.

“We’re able to track what serial and lot number we’ve sent to our customers rather than asking them to check on the box.”

Acctivate also adds a layer of cost management as true costs are captured per lot or serial number, as well as for raw materials and finished goods during chemical manufacturing.

“Acctivate has given us greater visibility. We have a much better understanding of our Cost of Goods Sold because we can track by lot number. We are getting actual costs rather than an average. We have become more accurate in our reporting,” Tolbert said.

Order Fulfillment

As AP Tech Group ships about 50 to 100 packages per day, Acctivate optimizes their order fulfillment with key components, including order picking and UPS and FedEx integration.

“We’ve had a reduction in shipping errors with Acctivate and that’s reduced cost,” Tolbert said.

With the ability to generate pick tickets out of Acctivate and manage the entire process, new AP Tech Group employees can be trained easily on the picking process and the orders can be picked efficiently.

“We are able to show a component list on the pick tickets and that has really helped. We’ve also added some regulation-specific HAZMAT labeling to the pick tickets,” Tolbert added.

Acctivate’s integration to AP Tech Group’s shipping carriers enables instant access to tracking numbers.

“The tracking information that’s being auto-generated and sent to customers with their invoices has been very helpful. It has freed up a lot of time on calls and manual data entry that we were doing before to process that. I know the customers appreciate it.”

“Over the last year and a half, we’ve definitely increased our sales and there has not been any time increase. Everything was all manually entered before Acctivate. Acctivate has saved a lot of time in just passing paperwork from person to person. Now it’s entered into the database, we can pull it in a report, and we can always look it up. We were filing these physical pieces of paper and tracking that down in file cabinets was tedious. All data is available within the SQL database, so it’s all accessible in any kind of customized report we want to do.”

Trey Tolbert, Operations Coordinator, AP Tech Group