

## *ACCTivate! by Alterity*

**Overall Rating****9.0****Summary****Product Name**

ACCTivate! by Alterity

**Reviewed By**

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ACCTivate! provides small and mid-sized businesses with enterprise-like inventory capabilities. ACCTivate! furnishes the end-user with the necessary tools to manage an inventory-intensive distribution business, while allowing the end-user to continue use of QuickBooks for accounting. ACCTivate! manages everything from controlling inventory, sales orders, purchase orders FedEx and UPS integration. ACCTivate! is flexible and configurable, and an end-use customer can have dozens of users in the system at the same time, control inventory and orders for multiple warehouses, and use one copy of ACCTivate! to run multiple companies with common ownership.

**Strengths**

After ACCTivate! is installed, inventory, customer information, and other necessary data is migrated seamlessly from QuickBooks to ACCTivate!. ACCTivate! assumes the day-to-day operational activities including sales orders, purchase orders, inventory management, etc. ACCTivate! is a bi-directional synchronization process, which is used to update QuickBooks. Customers, invoices, inventory, vendors, and item lists are easily migrated from QuickBooks to ACCTivate!.

**Limitations**

Functionality was excellent with this product; there were no encountered limitations.

**Wish List**

The ACCTivate application is an excellent solution. This product offers so many features that it was difficult to identify any wish list items.



Product Ratings	Rating
<p><b>Setup and Installation:</b> Set up and installation was fairly simple, but technical support was needed. The ACCTivate! support team was excellent.</p>	9.0
<p><b>Interface:</b> The interface is seamless. The product is not intuitive but once the company provides training, the user should be able to function at a very high-level with this product. Synchronization is required and can be determined based on the end-use customer requirements.</p>	9.0
<p><b>Features:</b> There are too many great features to list and many go well beyond the scope of this review. ACCTivate is modular based and depending on the end-user requirements, this application can act not only as a comprehensive inventory management and distribution tool, but as a CRM and a Help Desk as well.</p>	9.0
<p><b>Follow-through on Claims</b> ACCTivate! makes the following claims on the QuickBooks Solutions Marketplace. Most of the claims were utilized as the basis for this review. A sampling of functions was verified for each process area. The product performed as stated.</p> <p>(Note: all process areas below state there are unlimited custom reports utilizing crystal report writer, this functionality was not tested):</p> <p><b>Selling :</b></p> <ul style="list-style-type: none"> <li>• Quickly enter sales orders.</li> <li>• Quickly find products on the sales order.</li> <li>• See accounts with credit problems automatically.</li> <li>• See each product's inventory levels (in each warehouse) while entering the order.</li> <li>• Perform quotes for any customer and save them.</li> <li>• Easily turn saved quotes into orders.</li> <li>• Use the flexible pricing functions in ACCTivate! to give the exact price for each customer</li> <li>• Use pop-up notes</li> <li>• Store unlimited ship-to address for each customer</li> <li>• Set a requested delivery date and a promised shipping date for each order.</li> <li>• Set a “do not deliver before” or a “do not deliver after” date for each order.</li> </ul> <p><b>Purchasing</b></p> <ul style="list-style-type: none"> <li>• Setup multiple vendors per product.</li> <li>• Business Alerts tell you when any product drops below its reorder point.</li> <li>• Store each vendor's product ID number and quickly compare vendors who sell the same product.</li> </ul>	8.5

## Ratings Definitions

**10.0 (Perfect):**

This is a very rare score is reserved for a product that is as perfect as it could be.

**9.0 to 9.9 (Spectacular):**

A product that receives a rating in this range succeeds at meeting all of its intended users' needs and has no major drawbacks.

**8.0 to 8.9 (Excellent):**

A product that receives a rating in this range is superior in so many ways that its few drawbacks do not have much negative impact.

**7.0 to 7.9 (Very good):**

While the strengths of a product scoring in this range certainly outweigh its weaknesses, it has some minor faults that users should be aware of.

**6.0 to 6.9 (Good):**

This range represents a product that is above average. Its strengths outweigh its weaknesses, making it good for most uses but not a standout.

**5.0 to 5.9 (Average):**

A product that scores in this range is functional but unremarkable.

**4.0 to 4.9 (Mediocre):**

Products in this range are below average. They fall in the middle of the pack for most features, but suffer from a few additional major flaws.

**3.0 to 3.9 (Poor):**

A customer should probably not consider purchasing a product in this range or lower. There may be one or two specialized circumstances, however, that could justify the purchase of this product for a very low price for a specific demand.



- *Print both your product ID number and the vendor's product ID number on the purchase order.*
- *Quickly lookup information for each vendor such as the lead-time, published price, last purchased price and vendor part number.*
- *See how much product is on hand, available, scheduled to ship and backordered before you order.*
- *Each product has it's own reorder point to notify you when it needs to be reordered.*
- *Drop-ship wizard automates drop shipments from vendor to customer.*

### **Inventory Management**

- *Store unlimited products in ACCTivate!.*
- *Instantly know and compare your inventory levels in multiple warehouses.*
- *Instantly know what is on-hand, available, scheduled for shipment and backordered.*
- *Instantly know the total value of your inventory on a product-by-product level.*
- *Set a reorder point for each product to alert when inventory drops below this level.*
- *Set a stocking level for each product that you desire to always have this amount on hand.*
- *Set a standard re-order quantity for each product so everyone knows how much to order.*
- *Set an unlimited number of product substitutions for each product.*
- *Quickly and easily track backorders and be ready to ship when you receive.*
- *Quickly see all sales orders that have any specific product.*
- *Quickly see all purchase orders that have any specific product.*
- *Track lot numbers, serial numbers, substitutions and even store a product picture.*
- *Track unique information in custom fields.*
- *Track inventory through barcodes, and even store a UPC code for each product.*

### **Customer Relationship Management**

- *Get a big-picture view of each customer on one screen.*
- *Quickly find your customers in the system, even if you only have an email address.*
- *Instant access to every sales order any customer has ever placed.*
- *Instantly see each customer's credit status and collection history.*
- *Store unlimited ship-to address for each customer.*
- *Store unlimited contacts for each customer.*
- *Track unique information in custom fields.*



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<p><b>Ease of Use/Service and Support</b> The product was easy to use but was not intuitive. End-User training is required. Implementation and training personnel were excellent and thorough.</p>	<b>9.5</b>
<p><b>Data Security</b> Security is determined at both the ACCTivate! and QuickBooks levels. The end-user will have access to the areas that have been defined by the customer.</p>	<b>9.0</b>
<p><b>Privacy</b> The company has a documented privacy policy which is available on their website, and is available at the bottom of the customer information form. Alterity does not sell information to third parties for marketing purposes, and clearly states that your information will be kept confidential.</p>	<b>8.5</b>
<p><b>Integration with QuickBooks</b> ACCTivate! integrates seamlessly with QuickBooks.</p>	<b>8.5</b>