ACI SME Technology Stack Guide: From Sales to Delivery

This document outlines the ideal technology stack for a small to mid-sized electronics manufacturer like American Circuits Inc. (ACI), following the process flow from lead generation to product delivery. It provides technology options at each step, including recommended platforms and alternate tools.

1. Marketing & Lead Generation

Purpose: Attract potential customers, build credibility, and capture leads.

Function	Purpose	Recommended Tools
Website & SEO	Showcase services and drive traffic	Webflow, Wix Studio, WordPress (Elementor), Framer
Analytics & Conversion Tracking	Understand user behavior	Google Analytics, Hotjar, Microsoft Clarity
Email Marketing & Campaigns	Customer retention & lead nurturing	Mailchimp, Brevo, ActiveCampaign, HubSpot
Forms & CRM Capture	Convert visitors to leads	Typeform, Paperform, HubSpot CRM integration

2. Customer Relationship Management (CRM)

Purpose: Manage leads, customer interactions, and pipeline visibility.

Function	Purpose	Recommended Tools
Lead Pipeline	Track sales stages	HubSpot CRM, Zoho CRM, Pipedrive
Contact Management	Centralized customer info	Salesforce Essentials, Copper, Less Annoying CRM
Quoting Integration	Bridge to ERP or quoting tool	Paperless Parts, Zoho CRM + Creator, Pipedrive + PandaDoc

3. Quoting & Estimating

Purpose: Generate accurate, BOM-driven quotes and respond quickly to RFQs.

Function	Purpose	Recommended Tools
Estimating Engine	Speed and accuracy for pricing	Paperless Parts, Quotebeam, CalcuQuote (for EMS)
Version Control & History	Track quote iterations	PandaDoc, Odoo Sales, QuotientApp
Quote-to-Order Conversion	Integrated with ERP	Acumatica, Cetec ERP, Katana MRP

4. Order Management

Purpose: Handle orders from confirmation to production handoff.

Function	Purpose	Recommended Tools
Order Entry	Digitize manual intake	Odoo, Katana, Acumatica, Fishbowl
Order Revisions	Change management	Epicor, Mendix (custom apps), Quickbase
Document Attachments	PO, spec, drawings	Odoo PLM, Google Drive + Zapier, DocuWare

5. Document Control & Engineering

Purpose: Manage BOMs, revisions, ECOs, and production data.

Function	Purpose	Recommended Tools
Document Control	Secure file versioning	Arena PLM, Upchain, MasterControl
BOM Management	Materials data with traceability	Altium + NetSuite, OpenBOM, Katana, Odoo PLM
Engineering Change Orders	ECO workflows	Jira + Confluence, Fishbowl, SolidWorks PDM

6. Procurement & Inventory Planning

Purpose: Ensure the right materials are ordered on time and tracked.

Function	Purpose	Recommended Tools
Purchase Orders	Auto-generated from demand	Acumatica, MRPeasy, Cetec ERP, Precoro
MRP / Planning	Forecast material needs	Katana, Business Central (Premium), Fishbowl
Supplier Collaboration	Quotes & POs with vendors	SourceDay, Anvyl, Paperless Parts Vendor Portal

7. Inventory Management & Traceability

Purpose: Maintain accurate real-time inventory and full component history.

Function	Purpose	Recommended Tools
Stock Levels	Real-time inventory	SYSPRO, NetSuite, Katana, Odoo Inventory
Lot & Serial Tracking	Regulatory compliance	Epicor, Cetec ERP, MRPeasy, DEAR Systems
Multi-warehouse Mgmt	Visibility across locations	Acumatica, Fishbowl, Unleashed

8. Production & Shop Floor

Purpose: Execute and monitor production efficiently.

Function	Purpose	Recommended Tools
Work Orders & Routing	Structure job steps	Epicor, JobBOSS², ProShop ERP
MES (Manufacturing Execution)	Real-time status, alerts	Siemens Opcenter, Tulip, Katana + Tablets
Visual Scheduling	Drag-and-drop capacity mgmt	Katana, Statii, EasyERP, Trello + Zapier (basic)

9. Quality & Compliance

Purpose: Ensure consistent quality, certifications, and audits.

Function	Purpose	Recommended Tools
Quality Inspection	Standardize QA checks	QT9 QMS, Qualio, Epicor Quality

Function	Purpose	Recommended Tools
ISO/ITAR Compliance	Document traceability	Arena QMS, MasterControl, ComplianceQuest
Audit Trails & Metrics	Analytics for QA	Acumatica Dashboards, Power BI, Airtable QMS

10. Shipping & Fulfillment

Purpose: Prepare, label, and ship finished goods.

Function	Purpose	Recommended Tools
Packing Lists & Labels	Barcode and lot info	ShipStation, Acumatica Shipping, Odoo Shipping
Carrier API Integration	FedEx, UPS, DHL, etc.	EasyPost, Shippo, SendCloud
Delivery Status	Real-time notifications	AfterShip, Route, Packeta

11. Financials & Accounting

Purpose: Track revenue, expenses, and margins.

Function	Purpose	Recommended Tools
Invoicing	Integrated with orders	QuickBooks Online, Acumatica, Xero, Zoho Books
General Ledger & P&L	Full accounting suite	SAP Business One, NetSuite, Business Central
Payroll Integration	Outsource + sync	Gusto, ADP, Rippling, Patriot Payroll

12. Business Intelligence & Reporting

Purpose: Enable data-driven decisions.

Function	Purpose	Recommended Tools
Dashboards	Operations, finance, QA	Power BI, Tableau, Klipfolio
KPIs & Alerts	Early warning triggers	Acumatica Dashboards, Odoo Studio, Zoho Analytics
Custom Reports	Departmental drilldowns	Microsoft Excel PowerQuery, Google Looker Studio

Strategic Recommendations for ACI:

- **Low-Budget Option (Modular):** Odoo (Community), QuickBooks, Shippo, Trello, Google Drive
- **Mid-Tier Stack:** Katana + QuickBooks, HubSpot CRM, PandaDoc, MRPeasy, Gusto
- **Full ERP Suite:** Acumatica or Cetec ERP + integrated CRM, MES, QMS, shipping
- **Custom Workflows:** Mendix or Quickbase for bridging systems and UI enhancements

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This guide is a living document and should evolve with ACI's operational growth, budget, and strategic priorities. Ask your tech team or advisor to maintain this stack alignment with ongoing vendor changes and business needs.