

# APEX

Advanced Purchasing Extensions

## Your complete purchasing solution for Electrical, Plumbing, and HVAC Contractors

- Fast and flexible purchase order processing
- Internet business-to-business communications
- Comparative pricing analysis
- Pre-formatted or custom P/O layouts
- Powerful analytical and reporting tools
- Document imaging
- Advanced security features
- Pricing, estimating, and accounting system interfaces
- Multi-company capabilities



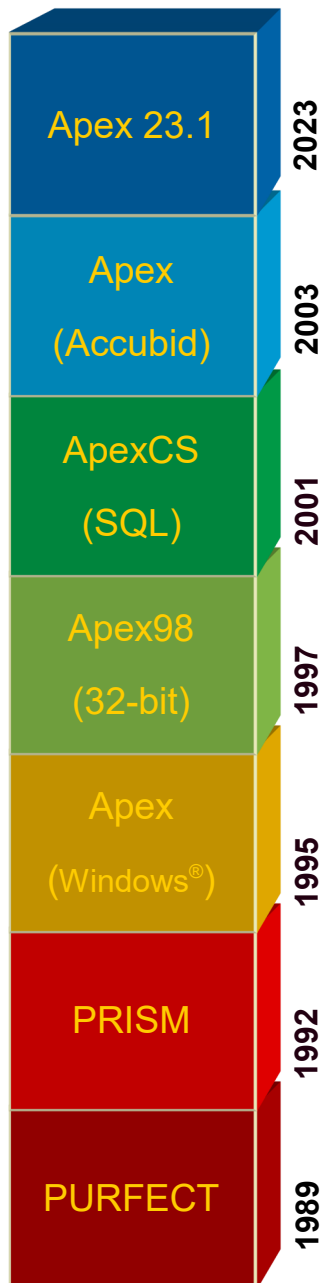
**Vulcan Software LLC**





VULCAN SOFTWARE LLC

March 20, 2020



Dear Reader:

There are a lot of good accounting systems on the market that will help you record your purchase orders. Apex was designed with a different goal in mind. Apex was designed to help electrical, plumbing, and HVAC contractors *create* and *manage* your purchase orders. As you will see in the following pages there are a lot of ways that Apex can help you do this.

The effect of having a tool like Apex is that you can easily prepare priced purchase orders, compare pricing between vendors, analyze your purchasing history, and communicate your purchasing information both within your company and with your distributors. Ultimately, this saves you time, effort, and money.

Of course, no contemporary software package works in isolation. That is why Apex seamlessly integrates with major estimating systems, pricing services, accounting packages, and other tools such as Excel® and Word®.

Apex is now in its 30th year of evolution, based on proven principles of best practices for electrical, plumbing and HVAC contractor purchasing. In the next pages you will get a sense of what a powerful purchasing system can do for you. Please don't hesitate to call if you have any questions or would like more information. Until then, I remain,

Very Truly Yours,

Phil Kramer  
Owner  
Vulcan Software, LLC

## Priced purchase orders

Since Apex can interface with pricing services, and import trade or net pricing obtained from your vendors, items on your purchase order are priced in advance. This eliminates the potential for miscommunication and human error.

## Easy and efficient P/O processing

With Apex, purchase order entry is fast and straightforward. All order entry options are available from a single screen.

You can search for items using commodity codes, keywords, industry standard catalog numbers, or manufacturers.

Items can be instantly added to a purchase order by using a quick code (that you assign), catalog number, a template bill of materials, a catalog number, or a UPC code. P/O lines can be imported and exported in a variety of formats including Microsoft Excel®.

Messages associated with your jobs, vendors, or the Apex message library can be easily added to your P/O.

While you are adding items to your purchase order, you can review all previous purchases of a particular item and its equivalents, beginning with your most recent purchases.

Description	Ext Desc	Qty Ord	UM	Price	Ext	Cost Cd	Tax?	Sub?	Ovr?	Quick Cd
CONDUIT 5-IN-90DEG-ALUM-5 ALUM 90	4 E	30	C	\$558.3900	\$16,751.70	6103				A50090
CONDUIT 5-IN-5 ALUM RIGID CONDUIT	8 E	30	C	\$2,499.4700	\$74,984.10	6103				A50090
CONDUIT 5-IN-ALUM-CPRG 5 ALUMINUM C	8 E	30	C	\$90.8400	\$2,725.20	6103				A500CP
BRDGPORT 111-5-SIN STL CND LOCKNUT	8 C	4	C	\$1,319.4200	\$5,277.28	6103				LN500
BRDGPORT 331-5-IN 10SD PLSTC BUSH	4 C	4	C	\$713.3700	\$2,853.48	6103				PB500
P-STRUT P51100-5-HG SIN PIPE CLAMP	14 C	1	C	\$945.1500	\$945.15	6401				
OZ-G PLG500C SIN SQ HD PLUG	2 E	2	E	\$95.2100	\$190.42	6103				
12"X12"XB" J-BOX N-1 NIK	1 E	1	E	\$27.5200	\$27.52	6103				

*P/O Maintenance using the Construction Theme*

Order Date	P/O	Line	Description	Job	Vendor	Qty Ord	Qty Outst	Price	UM	Ext	Tax
4/27/2005	108090	4	STL-CTY 53151-1/2 4SQ 1-1/2D EXT	11065	2716	15	15	\$66.95	C	\$10.04	
10/25/2004	104818	6	RACO 201 4SQ 1-1/2D EXT 1/2 KO	55193	1313	50	50	\$72.70	C	\$36.35	
9/10/2004	103978	13	BOWERS 4-SW-EXT-1/2 4IN SQ EXT RING	11019	3735	10	10	\$95.85	C	\$9.59	
9/2/2004	103847	39	STL-CTY 53151-1/2 4SQ 1-1/2D EXT	11045	4510	20	20	\$65.15	C	\$13.03	
7/23/2004	103073	7	STL-CTY 53151-1/2 4SQ 1-1/2D EXT	11014	4510	200	200	\$61.62	C	\$123.24	
5/18/2004	101801	1	BOWERS 4-SW-EXT-1/2 4IN SQ EXT RING	55278	3735	20	20	\$86.23	C	\$17.25	
4/22/2004	101369	7	STL-CTY 53151-1/2 4SQ 1-1/2D EXT	33182	2716	15	15	\$57.89	C	\$8.68	

Description	Ext Desc	Qty Ord	UM	Price	Ext	Cost Cd	Tax?	Sub?	Ovr?
STL-CTY 53151-1/2&3/4 4SQ1-1/2D EXT	50 C	1	C	\$48.26	\$48.26	6203			
STL-CTY 73151-1/2-3/4 4-11/16SQ EXT				\$215.80	\$215.80	6203			
STL-CTY RS16-CC COVER F/RCPT				\$16.77	\$16.77	6307			
STL-CTY RS9 COVER F/SW				\$7.52	\$7.52	6307			
LEV 7899-I 20A SL PRO GFCI				\$91.70	\$91.70	6307			
LEV 1221-2I SP 20A 277V IV AC SW				\$22.62	\$22.62	6307			
BRDGPORT 106-S 2IN STL CND LOCKNUT				\$1.42	\$1.42	6103			
BRDGPORT 326 2-IN 10SD PLSTC BUSH				\$0.65	\$0.65	6103			
B-LINE B2013PA-ZN PLTD COND CLAMP				\$4.12	\$4.12	6481			
B-LINE B2014PA-ZN PLTD CND CLAMP				\$1.11	\$1.11	6481			
STL-CTY CY-1/2 3-1/2D SW BOX W/EARS				\$8.40	\$8.40	6203			



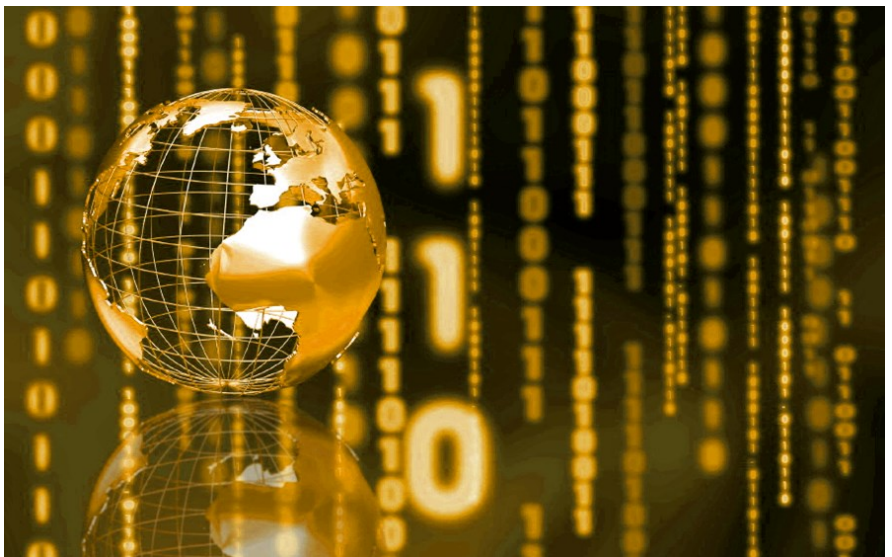
## **Business-to-Business Communications**

Business-to-business communications, also called “B2B”, uses the Internet to communicate information between you and your distributors. Of course you have been doing that for years now by using email. The difference is that with B2B communications Apex and your distributor’s computers communicate with each other directly. There is no rekeying of your purchase order, no delay while someone gets to their email, and no errors when things are transcribed incorrectly.

It is exciting to see this in action, but more importantly B2B communications “reduces the friction” involved in purchasing material. It is a huge win-win for both you and your distributor.

### **Sending your purchase orders**

You can send your purchase order to your distributor with the push of a button. Depending on the capabilities of the distributor Apex will send the information to them in an appropriate format.



### **Receiving acknowledgements**

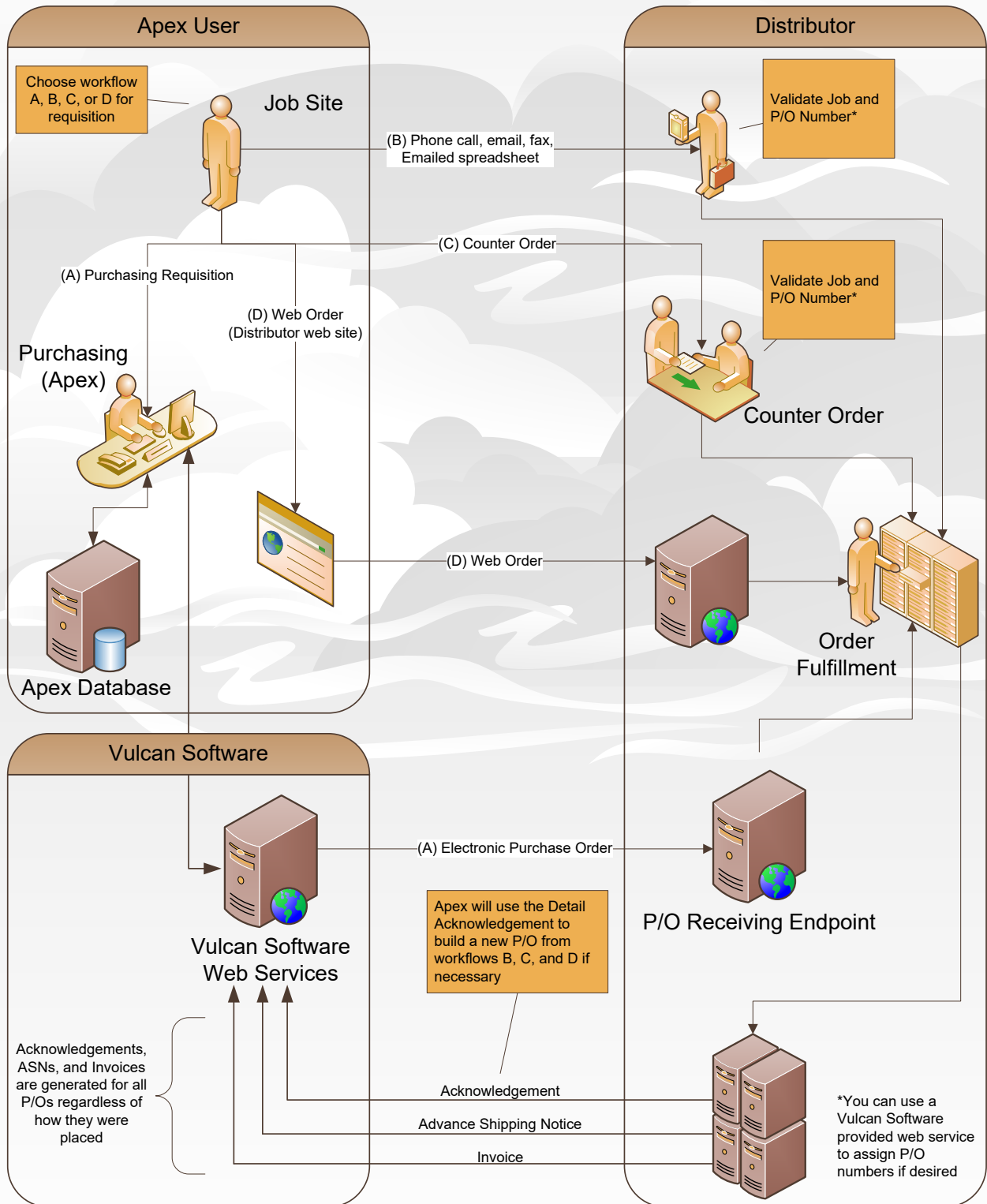
An acknowledgement is used to confirm the prices and availability of your items. It also ensures that the vendor understood your order and wrote it up correctly. Often you might receive back an acknowledgement within minutes of placing your order. No waiting until the next morning to find out that the material isn’t going to arrive on time.

When you get an acknowledgement back from the distributor Apex will compare it with the purchase order in your records and note any differences. If the purchase order is not already in Apex then the whole thing can be built for you from scratch without you doing any data entry!

### **Receiving ASNs and Invoices**

Advance ship notices are used to create your material receipts, just like if you had entered them in Receiving Maintenance. This allows you to manage your receiving by exception instead of having to do all of the data entry yourself. Finally, you can receive your invoices electronically and add them to your Vendor Invoice Reconciliation screen.

# Apex / Distributor Business-to-Business Workflow

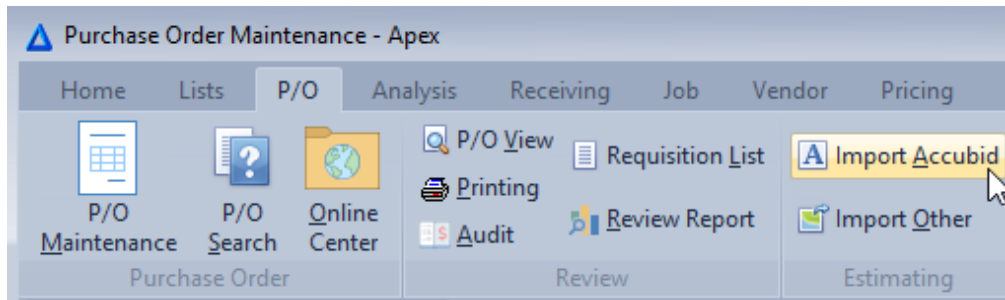




## Fast and flexible order entry

Apex provides many time-saving shortcuts, while still allowing you to control the appearance and content of your purchase orders.

With Apex, you can automatically create purchase orders from your existing estimating data. Your material requirements will be effortlessly translated into purchase order entries. You can import estimates from a number of popular estimating systems.



## Comparative pricing analysis

For each purchase order, Apex can generate a comparative pricing report that indicates the lowest prices available from various suppliers for both the entire purchase order and each individual item.

You no longer have to send every order out for quotes to ensure that you are getting competitive prices.

With information like this at your fingertips, you can make informed purchasing decisions and negotiate better material discounts.

Line	Item	Qty Ordered	Col 3 Price	STONEW Price	WESCO Price	STUSSE Price	NORTH Price	LOW Price	From
1	CONDUIT 1/2 1/2 EMT THINWALL CONDUIT	250	61.48	30.00	24.59	23.75	23.83	23.75	STUSSE
2	CONDUIT 3/4 3/4 EMT THINWALL CONDUIT	100	43.70	17.64	17.48	16.92	16.94	16.92	STUSSE
3	P&S 5242 BRN DPLX RCTP-NEMAS-15R	50	275.00	52.24	175.00	275.00	275.00	52.24	STONEW
4	RACO 605 3-1/2 SW BOX W/FLAT BRKT	10	36.91	12.92	14.77	12.92	18.46	12.92	PLATT
5	WIRE THHN-12-BLU-19STR-CU-500S R	1,000	109.44	65.66	65.66	60.19	62.72	60.19	STUSSE
6	WIRE THHN-12-GRN-19STR-CU-500S R	1,000	109.44	65.66	65.66	60.19	62.72	60.19	STUSSE
7	WIRE THHN-12-BLU-19STR-CU-500S R	1,000	109.44	65.66	65.66	60.19	62.72	60.19	STUSSE
8	WIRE THHN-12-WHT-19STR-CU-500S R	1,000	109.44	61.38	65.66	56.61	56.00	56.00	NORTH
9	WIRE THHN-12-PNK-19STR-CU-500S R	1,000	109.44	61.38	65.66	56.61	56.00	56.00	NORTH
10	WRAPPING TAPE	20	110.00	110.00	110.00	110.00	110.00	110.00	NORTH
Totals:			1,074.29	542.54	670.14	732.38	744.39	508.40	

10 P/O Lines Listed.

## Professional Reporting

You can print your purchase orders using Apex's pre-defined templates, or you can customize the P/O layout to match your existing forms. You can incorporate your company logo and control the positioning of individual elements within the P/O.

Apex can generate a variety of other useful reports, including a consolidated material report, job costing report, and material flow report. All purchase orders and reports can be easily printed, faxed, emailed, or exported in a number of formats including Excel®.

## Purchasing Communications

There are people within your organization that need purchasing information but may not normally have access to the Apex program. Project managers, foremen, and accountants are good examples. Apex makes sure that you can keep these contacts up to date on your purchases.

A list of contacts is maintained in the Apex program and then associated with the jobs that they are authorized to access.



From there you can “push” information out to your contacts using programs such as the Material Spreadsheet Emailing utility, let them “pull” the information as they need it using the Apex Web application, or both. Using the Apex Web application, they can enter requisitions, release material, enter material receiving, examine consolidated material reports, and inquire about their purchases. This can all be done from their PC, tablet, or cell phone.

## Material and pricing information

Apex can interface directly with popular pricing services such as i2<sup>®</sup> (formerly Trade Service), and import trade or net pricing obtained from your vendors using standard pricing formats or over a dozen different file formats, including Excel<sup>®</sup>.

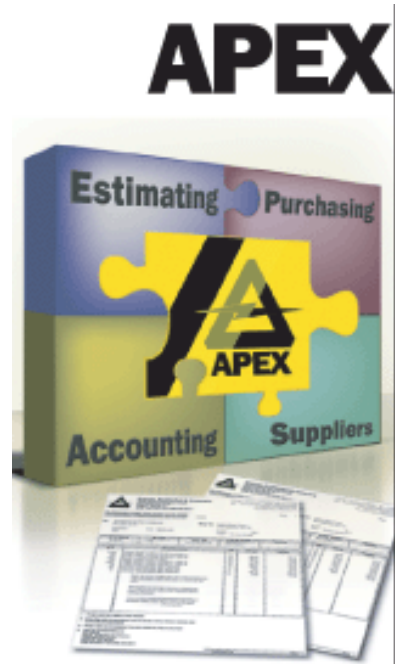
## Seamless integration with accounting systems

The Apex purchasing system integrates seamlessly with accounting systems to avoid duplication of effort. Apex can share purchasing information with accounting systems including COINS<sup>®</sup>, Spectrum<sup>™</sup>, Timberline<sup>®</sup>, Viewpoint<sup>®</sup>, Maxwell<sup>™</sup>, and many more.

## Document Imaging

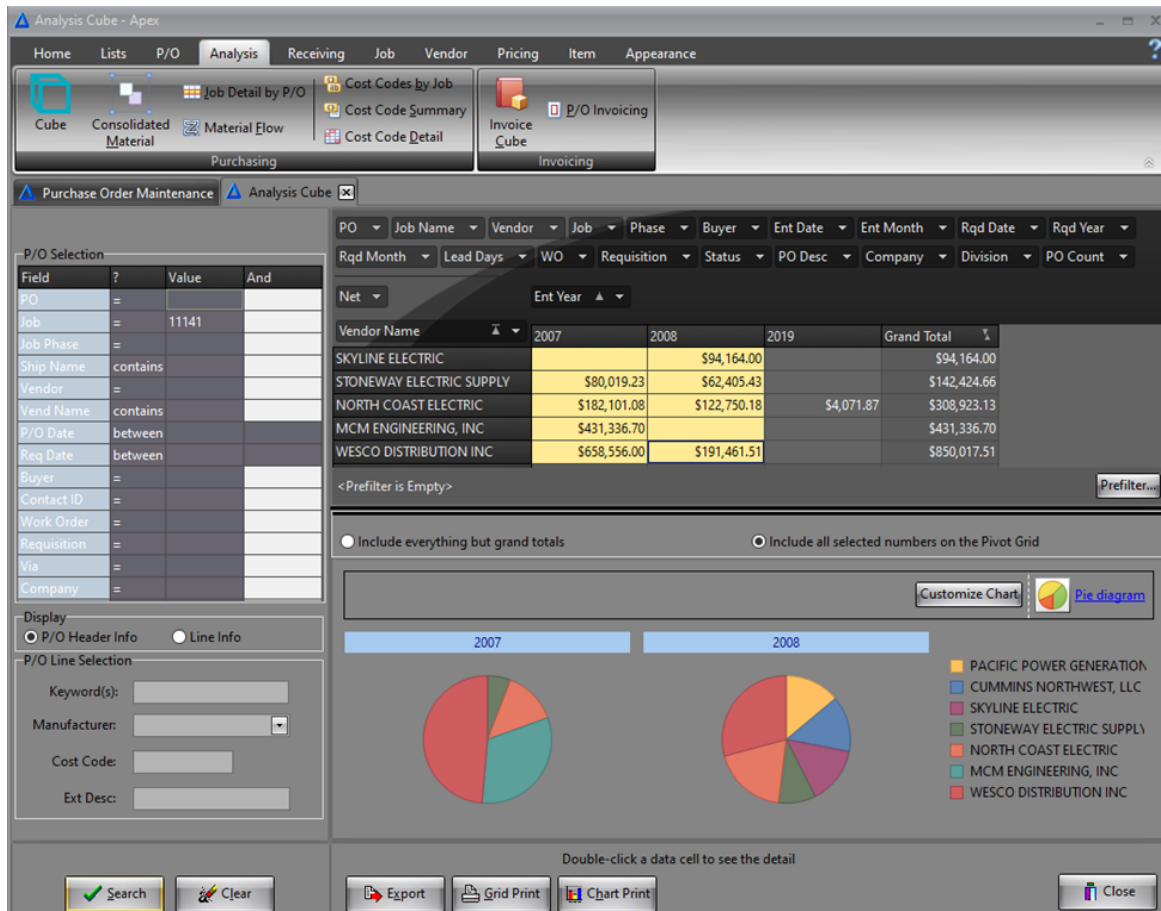
Submittals. Vendor quotes. Specifications. Packing slips. Invoices. Signed authorizations. Chances are that you have a whole host of documents that support your purchase orders.

Apex allows you to scan or import these documents right into the program. You can print or view them as needed. You can even print out selected document images as part of your P/O printing.

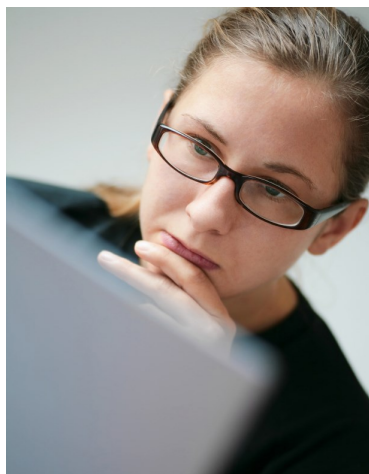


## Advanced Analysis

One of the foremost tools that Apex provides to help you analyze your data is the Analysis Cube. If you have used a pivot table in Excel® then you can probably visualize how the Analysis Cube works. The difference is that Apex sets up your data for you so that you don't have to do it yourself.



*Analysis Cube using the Dark Theme*



To use the Analysis Cube you simply drag and drop the fields you want to analyze into the rows, columns, and measures of the cube.

Apex does the rest by calculating all of the subtotals and grand totals.

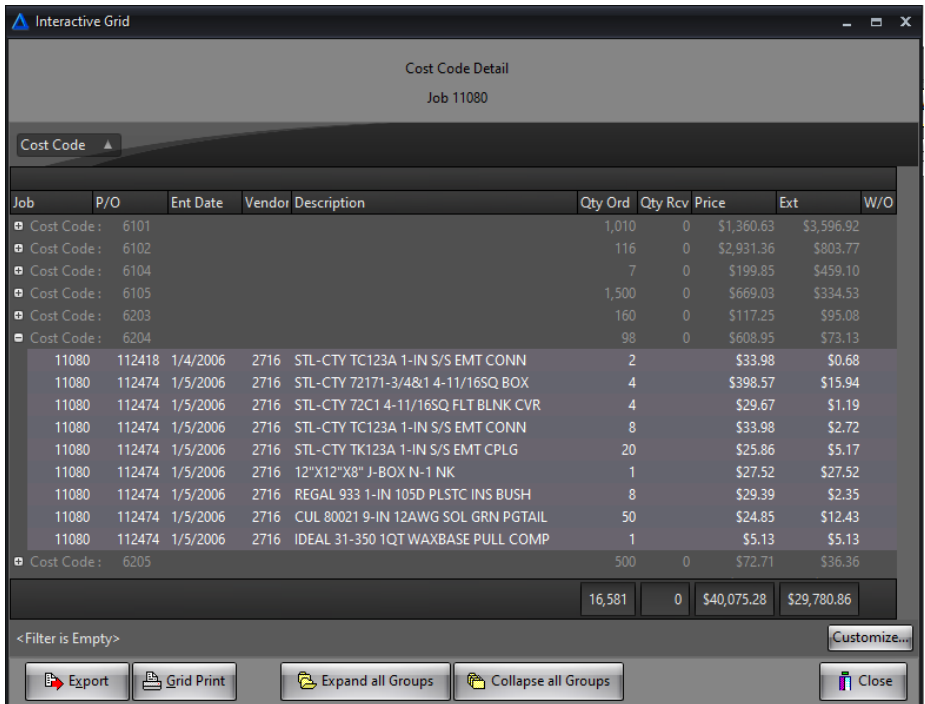
Want to explore your data and change the appearance of the cube? Just drag and drop the fields again and the new results are instantly calculated.



## Interactive Reporting

Sometimes you might find that a report is close to what you need “if only...” If only the data was sorted by descending amount, or grouped by item description, or filtered to show only wire purchases. With Apex you don’t have to worry about whether the exact report that you need is already built into the product. Instead, you can have most Apex reports displayed in an interactive grid. From there you are welcome to sort, group, and filter the data just the way you want.

You can add your own titles and display options in your interactive report. When you are finished you can print the report or save it as a PDF, Excel®, CSV, XML, or HTML file.



Job	P/O	Ent Date	Vendor	Description	Qty Ord	Qty Rcv	Price	Ext	W/O
Cost Code:	6101				1,010	0	\$1,360.63	\$3,596.92	
Cost Code:	6102				116	0	\$2,931.36	\$803.77	
Cost Code:	6104				7	0	\$199.85	\$459.10	
Cost Code:	6105				1,500	0	\$669.03	\$334.53	
Cost Code:	6203				160	0	\$117.25	\$95.08	
Cost Code:	6204				98	0	\$608.95	\$73.13	
11080	112418	1/4/2006	2716	STL-CTY TC123A 1-IN S/S EMT CONN	2		\$33.98	\$0.68	
11080	112474	1/5/2006	2716	STL-CTY 72171-3/4x1 4-11/16SQ BOX	4		\$398.57	\$15.94	
11080	112474	1/5/2006	2716	STL-CTY 72C1 4-11/16SQ FLT BLNK CVR	4		\$29.67	\$1.19	
11080	112474	1/5/2006	2716	STL-CTY TC123A 1-IN S/S EMT CONN	8		\$33.98	\$2.72	
11080	112474	1/5/2006	2716	STL-CTY TK123A 1-IN S/S EMT CPLG	20		\$25.86	\$5.17	
11080	112474	1/5/2006	2716	12"X12"X8" J-BOX N-1 NK	1		\$27.52	\$27.52	
11080	112474	1/5/2006	2716	REGAL 933 1-IN 105D PLSTC INS BUSH	8		\$29.39	\$2.35	
11080	112474	1/5/2006	2716	CUL 80021 9-IN 12AWG SOL GRN PGTAIL	50		\$24.85	\$12.43	
11080	112474	1/5/2006	2716	IDEAL 31-350 1QT WAXBASE PULL COMP	1		\$5.13	\$5.13	
Cost Code:	6205				500	0	\$72.71	\$36.36	
					16,581	0	\$40,075.28	\$29,780.86	

<Filter is Empty> Customize...

Export Grid Print Expand all Groups Collapse all Groups Close

## In closing...

After 30 years of development there is a lot more to Apex than I can express in this brochure. Features such as complete P/O change auditing, release orders, change orders, and other features may be important to your company but weren’t described in these pages.

Even so, Apex does not try to be everything to everyone. Here are some final thoughts about “Best Practices” that Apex promotes:

- ◆ It helps if you have (or want to develop) one or more centralized purchasing departments. A dedicated purchasing department can save you a lot of money in your purchasing when armed with a powerful tool like Apex.
- ◆ It helps if you subscribe to a pricing service such as i2®. It is hard for any individual company to keep track of 2 million material items or 250,000 equivalent item cross references. It is the UPC codes associated with your material items that facilitates communications between your company’s internal systems and your distributors. With Apex it is easy to work with these volumes of data.
- ◆ Many companies are very good at making sales and performing the work. One of the last remaining opportunities to increase profitability is to control your expenses. This is exactly where Apex can help. You just have to add the vision.

# APEX



## Apex Editions

- **Apex** is our flagship program and offers the full range of features and capabilities. This program is in use by a variety of companies ranging from small one-man shops to top-10 electrical contractors. Apex users receive unlimited phone support as well as access to the Apex Web Portal.
- **Apex Apprentice** is designed for smaller companies that do not need the full capabilities of the Apex product. Apex Apprentice users receive 90 days phone support, and unlimited support via the Apex Customer Portal thereafter.
- **Apex Online** provides you with the full power of the Apex program without worrying about hosting the database yourself. Instead, you can use your broadband connection to run Apex using a Remote Desktop connection.

## Apex Feature Matrix

Feature	Apex	Apex Apprentice	Apex Online
Optimized P/O entry via Quick Codes, Templates, and more	●	●	●
Comparative pricing analysis	●	●	●
Material search via commodity code, keyword, catalog, mfg	●	●	●
Customized P/O printing formats	●		●
Internet business-to-business communications	●		●
Receiving and receiver printing	●		●
Change order and release order handling	●		●
Multiple company and division support	●		●

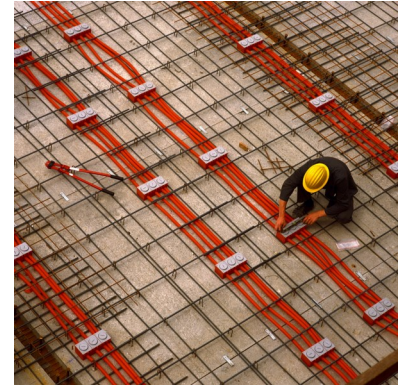
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*All versions of Apex include over 130 context-sensitive help screens and use a Microsoft SQL Server database for performance and stability.*

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## Apex Feature Matrix (continued)

Feature	Apex	Apex Apprentice	Apex Online
Item cross references	●	●	●
Message library, vendor and job messages	●	●	●
User defined purchase order fields	●		●
Purchase order change auditing	●		●
TRA-SER® link capabilities	●	●	●
Accounting system interfaces available	●	●	●
Estimating import	●		●
Analysis reports, cubes, searching, and history	●	●	●
P/O document imaging	●		●
Apex Web application integration	●		●
Vendor invoice reconciliation	●		●
Advanced Apex security	●		
Import / Export utilities	●		



## Minimum Workstation System Requirements

- Minimum CPU and RAM as specified by your operating system
- 1GB free disk space
- 1600 x 900 (100% scaling) minimum screen resolution
- Windows\* 7, 8, 8.1, 10, 11 or Windows 2016/2019/2022 Server

## Minimum Database Server System Requirements

- CPU(s) as specified by Microsoft for your operating system and SQL Server version
- Windows 2016/2019/2022 Server (recommended)
- 8GB RAM
- A fast disk system (RAID is recommended) with 2GB free disk space
- 1-4 users: The Apex CD comes with a free version of SQL Server (SQL Express)
- 4+ users: Any Microsoft supported version Microsoft SQL Server, Standard Edition or greater (purchased separately)

Windows is a registered trademark of Microsoft Corporation in the United States and other countries

*Your minimum PC requirements may be different due to the minimum requirements to operate with Microsoft SQL Server. See your Microsoft documentation for more details.*

## Apex Customer Portal

Additional information including current pricing is available on the Apex Customer Portal at [www.apexpurchasing.com](http://www.apexpurchasing.com).

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