ALERE®
Business Applications

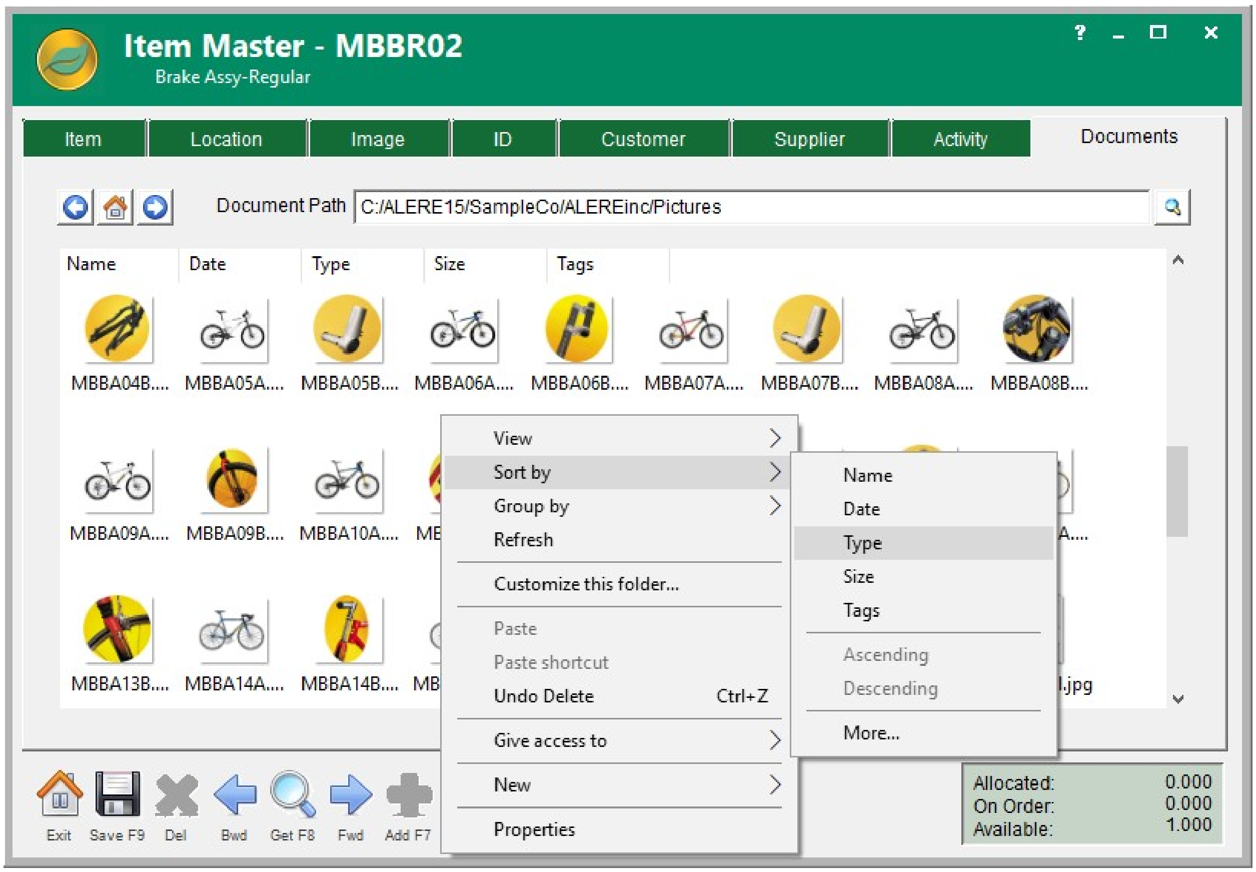
New Features

REVIEW OF NEW FEATURES AND CHANGES IN THIS RELEASE

August, 2019 | **ALERE® Version 15.0**

Document Management System Expansion – First introduced to the ALERE architecture in the form of Hyperlinks, document management allows digital documents to be tracked, managed, and stored to reduce paper. Document management provides a way to take information that is external to ALERE and make it available to users throughout the company.

This significant expansion of the document management system occurs when InTouch is present by adding a *Document* tab to key functions within ALERE.



Inventory Content Management

The *Document* tabs allow a default path to be set to prospects, companies, service sites, or inventory items. Each folder and file within the path appears using standard Windows defined icons. The folders and files can be managed, sorted and filtered using a variety of familiar tools, including Drag and Drop.

Document tabs are also added to the Sales Orders, Purchase Orders, Payables, Prospect Quotes, and Service Ticket screens. These tie back to the defined documents for the *Bill To/Pay To* companies on the orders.

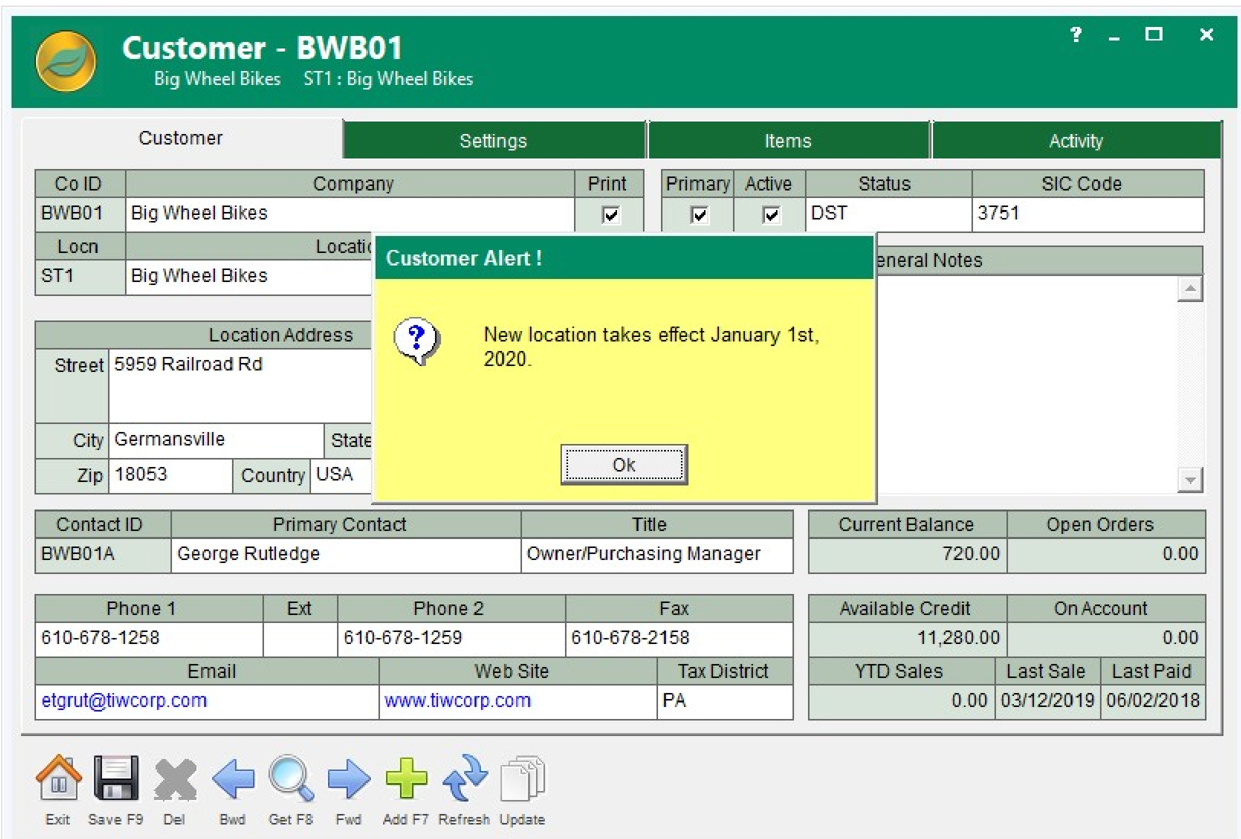
Employee Badge – The *Label Generation* screen can now be used to print employee badges.

Barcoding Shelving – A new label type of *Stores and Bins* has been added to the *Label Generation* screen for the purpose of barcoding shelving.

Accounting New Features

Multi-Currency Enhancements – Better support for foreign taxation was achieved by expanding the taxable fields on the sales and purchase type orders. A line item can now use PST sales tax only, GST taxable only, as well as non-taxable or fully taxable. Checking accounts can display the balance in the current value of a foreign currency. The multi-currency payables and receivables aging reports can be run for a foreign currency.

Priority Alerts – The ability to display an alert whenever a sales type order is created for a customer or when customer information is accessed is now available. Displaying the alert can be controlled on a user by user basis.



Customer Alerts

Printing for Mass Processing – The Sales Mass Processing screens have been changed so that multiple print options are available. The options include printing the list on the different grids and printing the actual sales type documents.

Mass Email Messages and Subjects – The *Mass Email/Mass List* screen in InTouch is now supported by being able to specify a pre-defined email subject and body from the *Company Codes* as defaults to use for the email.

Quotes and Items Tabs – The InTouch *Prospect Profile* screen received a *Quotes* tab so that a list of sales quotes can be reviewed and hyperlinked. A matching *Items* tab displays the items that can be found on the quotes.

Prospect Quote Revisions – Now prospect quotes can have revisions and revision dates set in the same manner as sales order types.

Transfer Order Activity Tab – Transfer Orders that are created from Purchase Orders are now displayed under the new *Source* column on the *Activity* tab of the *Transfer Order* screen. The Transfer Orders can also be found on the *Purchase Order* screen *Activity* tab if the *Source* filter is checked.

Transfer Order Miscellaneous – Three miscellaneous fields and one memo field have been added to the *Line Items* tab of the Inventory *Transfer Order* screen.

Transfer Orders Over Receiving – The ability to over receive has been added to Transfer Orders.

Mass Invoicing Shortcut – An *Invoice* button has been added to the Sales *Mass Picking* screen. Pressing this button will bring up the *Mass Invoicing* screen with all the applicable orders that are checked for picking already checked for invoicing.

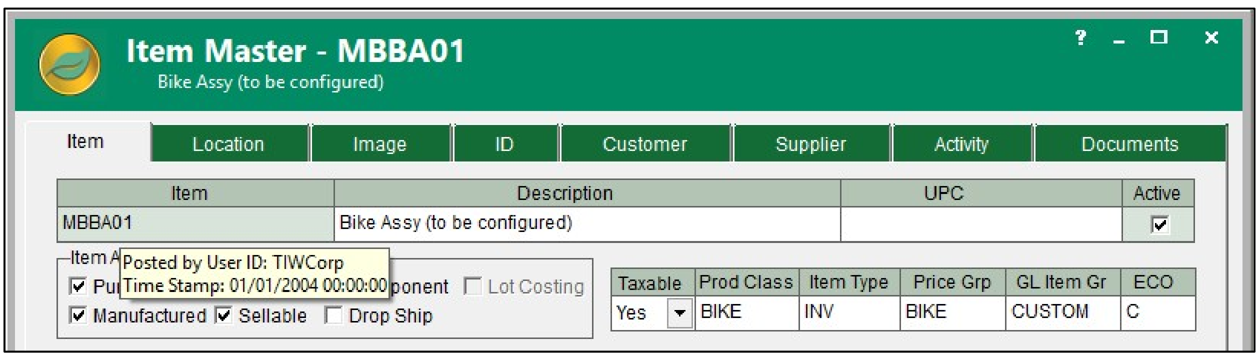
Credit Card On File – Authorize.net can now be utilized to use the previous credit card information for a customer that is on file with them.

New Customer Auto Email – A new email automation rule can now be setup to email an internal person or the user when a new customer is created.

Credit Memo Shortcut – An option has been added to the process of releasing and crediting a *Sales Return* that allows a *Credit Memo* to be printed.

Calendar Today Button – Clicking on the *Today* button on the InTouch *Calendar* screen will display the calendar, in week or month, with today's date visible.

Item Tooltip – Hovering the cursor over the *Item* field on the *Item Master* screen will display a tooltip consisting of the user and a time stamp that the item was added to inventory.



Item Tool Tip

Load Location – When adding a new consignment location on the *Company* screen, a *Load* button can be used to load the address and contact information from an existing customer.

Executive Advisor Additions – *Open Orders* in sales and *Open Purchases* are now included on the *Executive Advisor* screen.

Posting Date – When creating a *Credit Memo* from an *AR Invoice* the order/posting date can now be selected.

Material Available – When doing a *Mass Issue* or *Mass Issue Return* on the *Mass Transaction* screen there is now an option to filter the list to show those orders that have sufficient material available.

Setting Decimal Quantities – The *Costed Roll Up* screen was given an option for setting the decimal quantities on the new costs.

Partial Credit Refund – The *Bank Transaction* screen now supports the posting of a partial credit card refund.

Group Pricing – Provisions for *Group Pricing*, using a common agent, are now part of ALERE. The agent is established as a company and a *Pricing Contract* is drawn for them. A customer, referencing the *Agent ID*, becomes part of the group and is given the *Pricing Contract* numbers.

Date Change – When releasing a *Blanket* or *Recurring Sales Order* the *Need By Date* can be changed.

Inventory Browsers – A right click option has been added to inventory browsers to go to the *BOM* screen in addition to the *Configuration*.

Browser Product Class – The *Product Class* has been added to the various item browsers from the order screens.

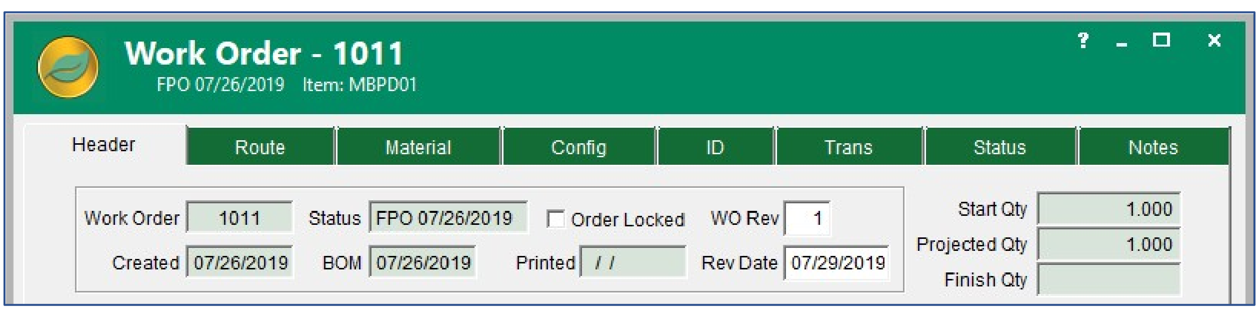
Location Browser New Fields – On the *Inventory Adjustment* screen, the location browser now includes information for on hand quantities and the stores/bins.

Checking Accounts Currency – *Checking Accounts* can now be displayed in any defined currency.

Update Sales Documents – A new *Update* button was added to the *Customer* and *Company* screens to update sales type documents when location information has changed.

Manufacturing New Features

Work Order Revisions – Work Orders now have a revision level and revision date similar to the other order screens. There is also a screen to add a revision note with the ability to add the user and a time stamp. An option on the *Company Defaults* screen controls the automatic tracking of the work order revisions.

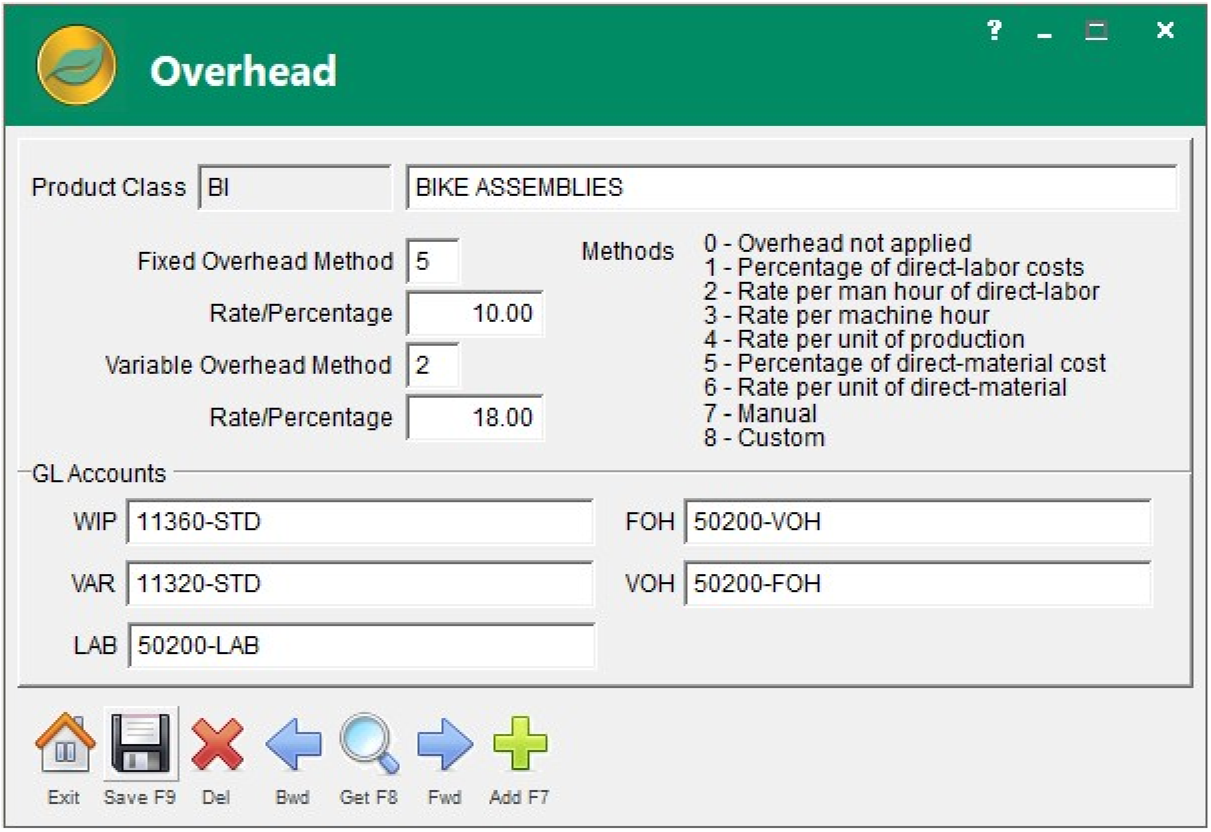


Work Order Revisions

Order Minimum/Increments – A new option can instruct the *Generate Recommended Purchase Orders* process to use defined order minimums and increments when generating purchase orders.

Item Where Used – A *Used* button on the *Item Master* screen will display a browser listing the bills of material where the item is being used. This also provides an immediate link to those bills.

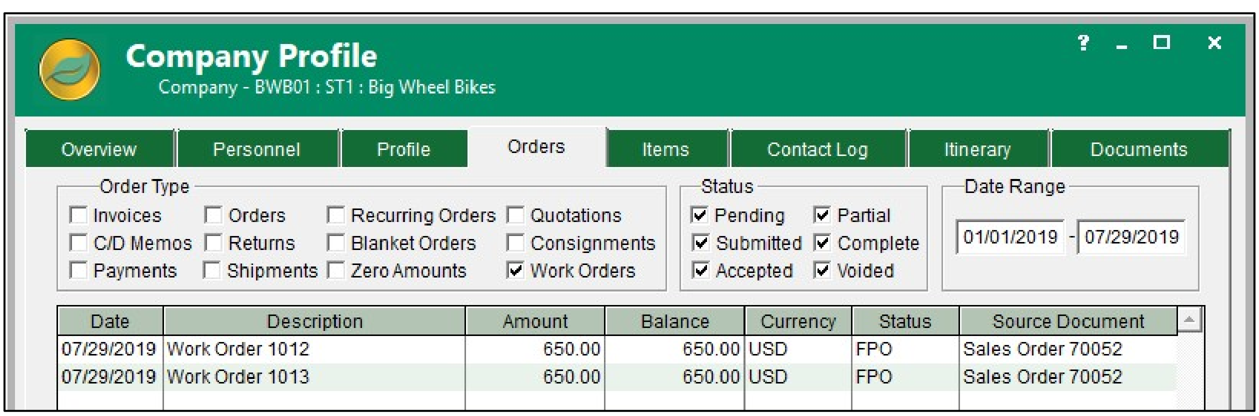
Manufacturing Overhead Improvements – Manufacturing *Product Classes* can now have linked *Labor*, *Fixed Overhead*, and *Variable Overhead* general ledger accounts.



Manufacturing Overhead

BOM / Inventory Hyperlink – A new passive hyperlink was added between the *Inventory* and *BOM* screens.

Work Order Visibility – The InTouch *Company Profile* screen *Orders* tab will now display and hyperlink to work orders for a customer.

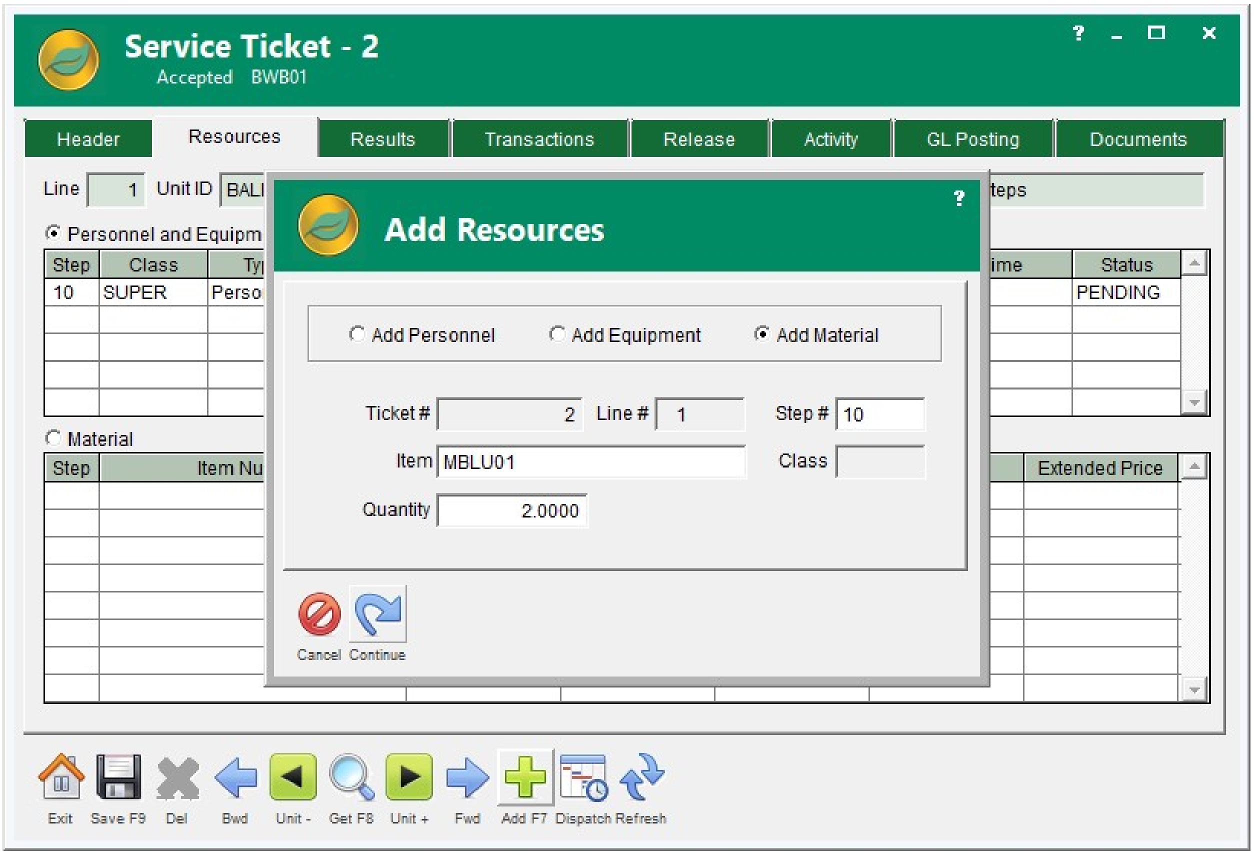


Work Order Company Visibility

Alternate Substitution – When a work order is FPO'd, the availability of each item on the material list will be checked before they are allocated in inventory. Should an item on the list be unavailable, then a check will be made to see if there are any alternates and if they are available. If so, then that alternate item will be substituted and the material list will be updated. The list of substitutes for an item is controlled through the creation of an *Alternate BOM* where the order of which alternate items to use is also set. The preference of the alternates can be set using the *Find No.* field.

Service New Features

Add Resources – The *Add* button on the *Service Ticket Resources* screen will now support adding personnel, equipment, and material to open service tickets. The step may be specified where the resources are to be added.

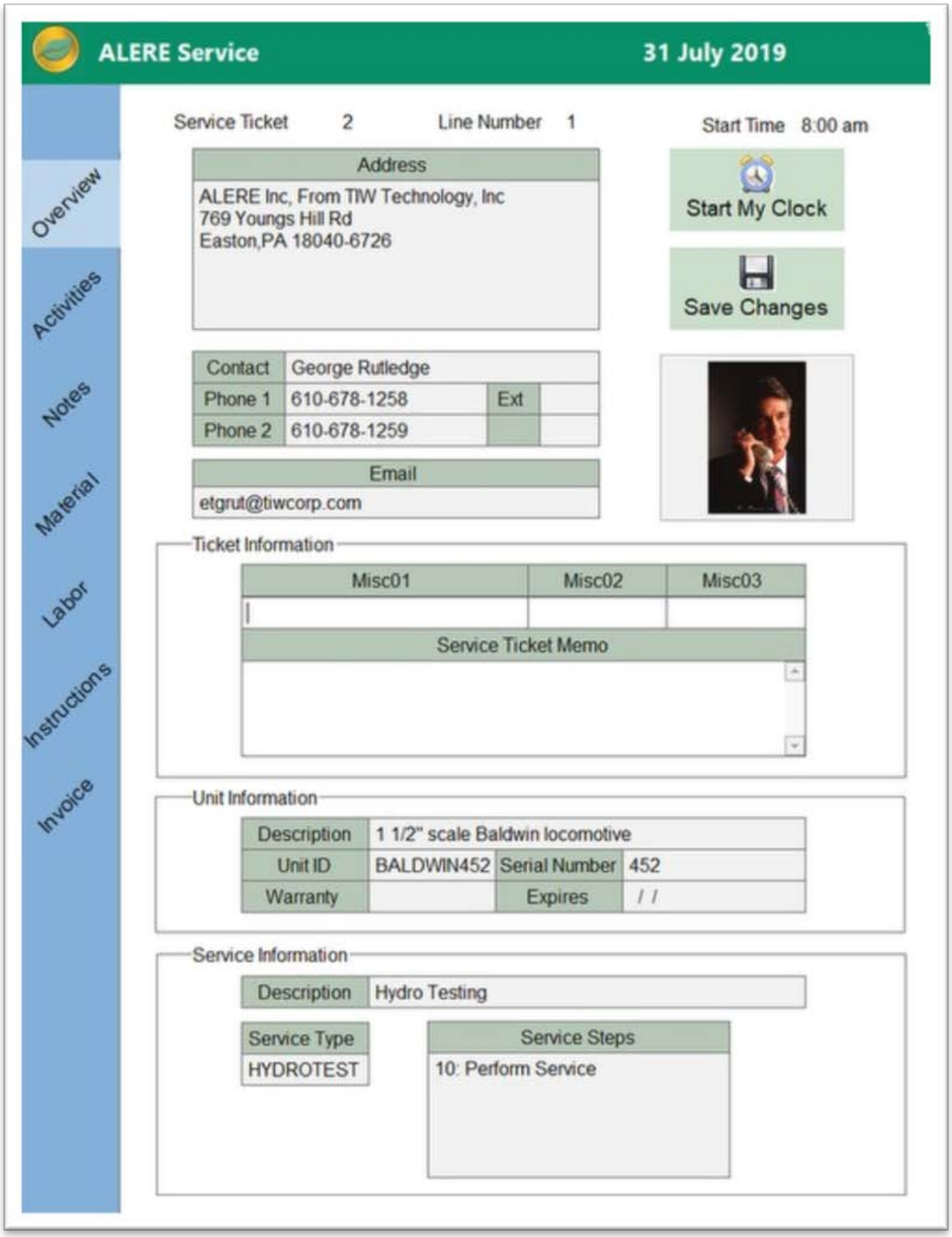


Adding Resources to a Service Ticket

Service Transaction Overrides – A new *Ask* checkbox on the *Service Ticket Transaction* tab allows an override of the store and bin when posting material or an override of the *Resource Class* when posting labor or equipment.

Service Item Type – The *Company Defaults* screen now has a default *Service Item* type.

Service App – A tablet based app permits service tickets to be processed in the field by service personnel. The Service app has a real time link to ALERE using an internet connection.



Service App

Service personnel can see their scheduled activities and corresponding service tickets for the day. Labor can be tracked, material issued, results gathered, and notes taken. Also included is collecting a customer signature and auto-emailing an invoice.

The Service app is available as part of the Mobility module.

New Reports and Changes

A new *Configuration Usage* report has been added to the BOM module.

The UPS tracking number is now included on the *Sales Invoice* report.

A new *Include Only* option choice of *Shipped and Received Differ* was added to the *Open Transfer Orders* report. It will display all Transfer Orders where the shipped and received amounts differ from one another.

An option has been added to the *Transfer Orders* report to print a version with bar codes.

A new *Purchase Invoice Journal* report has been added.

A new *Sales Invoice Journal* report has been added.

The *Sales Analysis* report has a new option to display or hide the *Cost of Goods* and *Margin* amounts.

An option for *Shipment Date Range* has been added to the *Bill of Lading* report.

The *General Ledger* report has a new *Account Balance* option to display the *Actual* or *Customary* style of balance.

The *Sales Invoice* report now has options to include service and a choice between printing service invoices or service summaries.

New Permissions

BRCU = Configuration Usage report
KFSD = InTouch Save Company Profile/Prospect Documentation path
PRIJ = Purchase Invoice Journal Report
SRIJ = Sales Invoice Journal Report
VFAL = Add Labor/Equipment to Service Ticket
VFAM = Add Material to Service Ticket
VFSP = Show Prices on Service App
VMSA = Single Purpose Service App

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