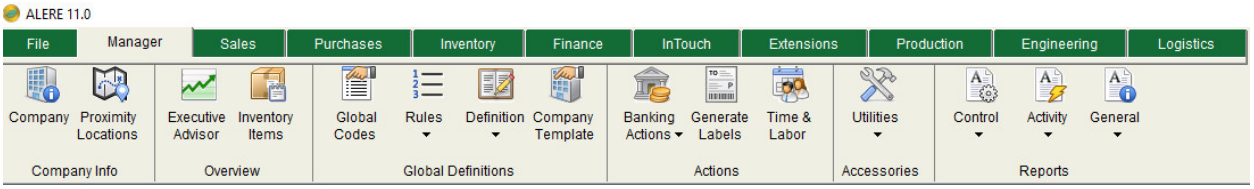
ALERE® Business Applications — New Features

REVIEW OF NEW FEATURES AND CHANGES IN THIS RELEASE

January, 2017 ALERE® **Version 11.0**

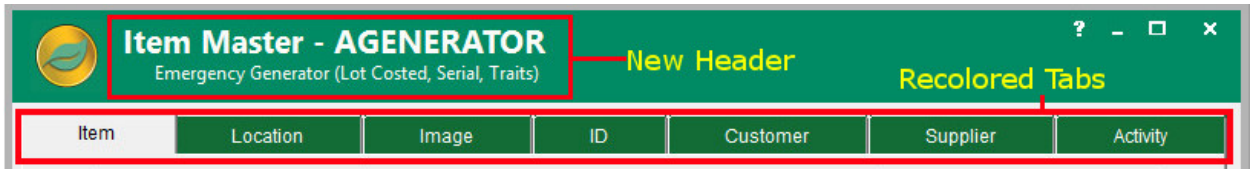
ALERE Combined – With the release of v11.0, ALERE Accounting and ALERE Manufacturing have been combined as one product offering. This allows a greater ease of viewing and linking across all the ALERE modules.

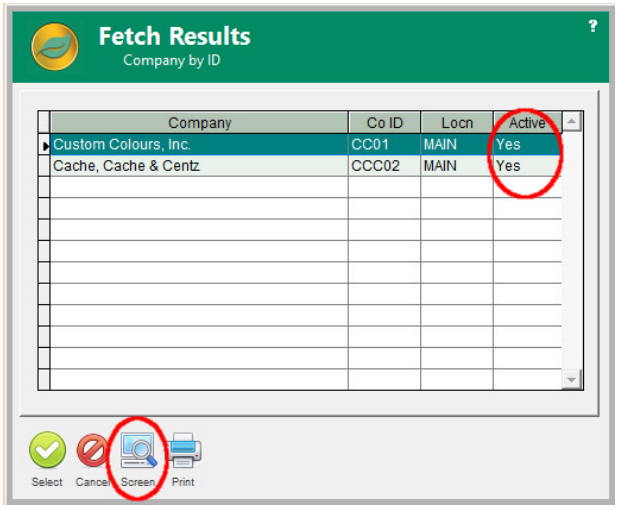
New Interface – v11.0 of ALERE now utilizes a ribbon interface in place of the menu system. The new interface allows for easier access to various features of ALERE and provides touch screen support for mobile devices such as tablets.



New Screen Header – Every screen in ALERE has been given a new header title bar to help convey more information.

Redesigned Active Screen Tab – The active tab on a screen is now colored white while the inactive tabs are colored dark green with white lettering. This approach provides more feedback on which tab is active.





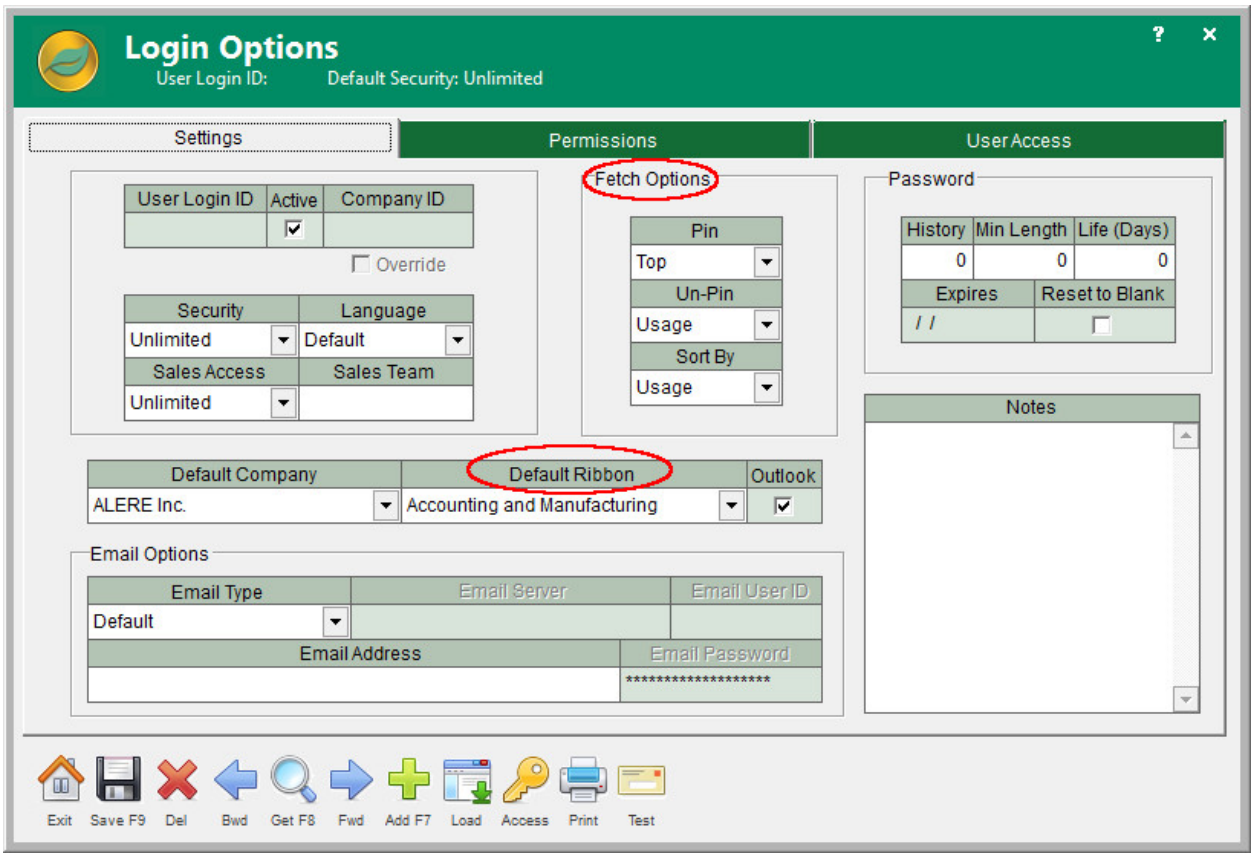
New Fetch Location and Options – Fetch has been integrated into the ribbon to match where Windows 2016 places search functions. Favorite searches may be pinned to the top of the list and the search order can be controlled. Selected pinned searches can be set by user.

Screen Button on Fetch Results – A screen button has been added to Fetch Results to better support ad hoc reporting.

Active Column in Fetch Results – The Fetch Results screen for companies or contacts now displays a column for the active status of the company.

Login Options Screen Changes –

- Each user can now set a default ribbon. Options for pinning, unpinning, and sorting functions within Fetch can also be set for each user.
- The interface for setting up options for specific companies has been streamlined. These definitions can now be directly added, deleted, saved and viewed with the standard screen functionality.
- The user permissions have been moved to a separate tab and can now be searched or filtered by Module, Password Type or Description.
- A new *User Access* tab has been added to allow user login options to be viewed across multiple users concurrently. A *Users* button allows the selection of which users are viewable on the tab. This allows individual rights to be set more rapidly and uniformly within a matrix style grid. There are filters to narrow the list of login codes by Module, Password Type, User Status and Exceptions.



New Login Screen – The splash screen has been combined with the user login screen.

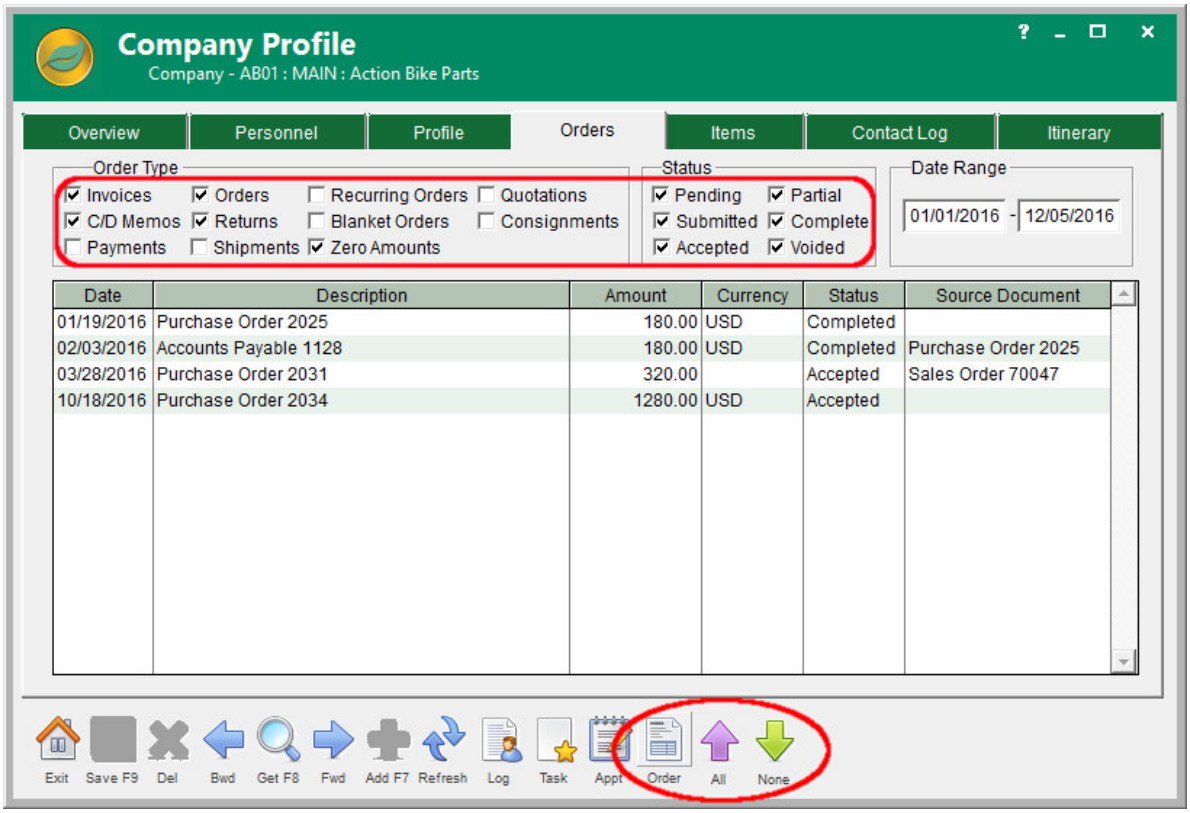
Additional InTouch Hyperlinks – Hyperlinks have been added linking the Company, Customer, and Supplier screens to the InTouch Company Profile screen. Additionally, hyperlinks were added to link the InTouch Contact screen with the Company and Company Profile screens.

Company Browser Right Click Options – Right clicking within the company browser now presents a menu option to display the InTouch Profile screen.

Prospect Quote Emailing – The *Print* button on the InTouch *Prospect Quotes* screen now provides the choice to email the quote.

InTouch Task Dates – When a start date is entered into the tasks screen, the due date automatically updates to the same date.

InTouch Order Tab Sorting – *All* and *None* buttons have been added to the InTouch *Order* tab. By default, clicking *All* once will check the remaining Order Type check boxes and *None* will clear both the Order Type and Status field. If all checkboxes are empty, the *All* button will first check the Status options then check the Order Type options if clicked a second time.



Enter Orders from InTouch Company Profile – On the InTouch *Company Profile* screen *Orders* tab, the *Order* button will now create a Purchase Order if the company is only a valid Remit To or PO To type company or a Sales Order in all other cases.

Auto-Fill City/State with Zip Code Entry – Using the tab button after entering customer or prospect address information in the Address 2 field moves the cursor to the zip field and automatically fills in the city and state for faster entry into ALERE.

Mass Email/Mail List Rules Refresh – A *Refresh* button has been added to the *Mass Email/Mail List Rules* screen. The screen now has the ability to test rules before saving them.

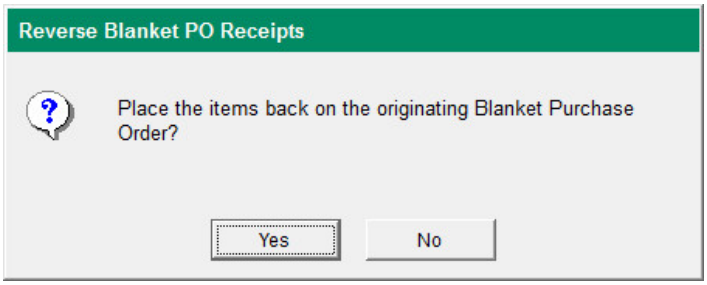
Label Generation Record Count– The label generation screen now displays how many records are selected out of the total number of records.

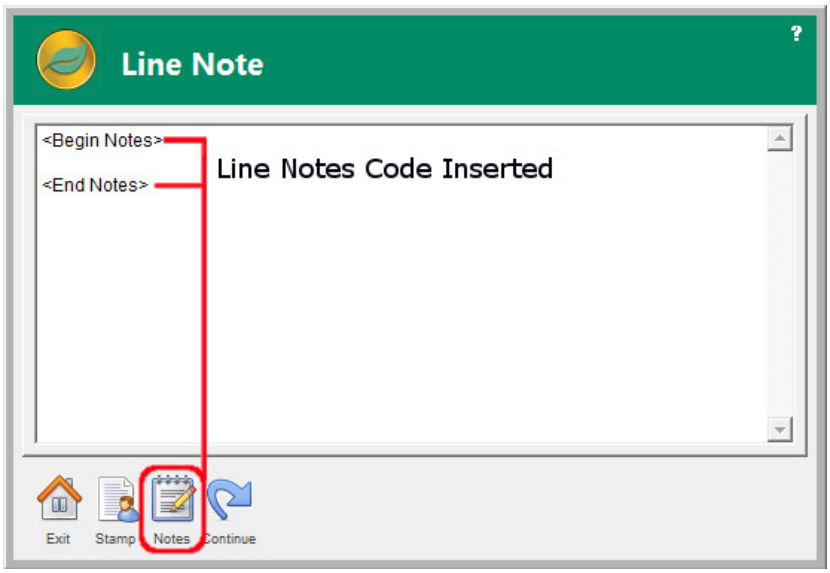
Assign Material Refresh Button – A *Refresh* button has been added to the *Assign Material* screen.

Sales Order Packing List – Utilizing the print button, users can now print the packing list from a Sales Order based upon what has been shipped from the order.

Open Blanket Sales Order Report – An *Open Blanket Sales Order* report was added to the product. The report shows the blanket order number, the item numbers included in the order, the need by date, the remaining quantity within the order and the values for the remainder of the blanket order. (Sales > Control Reports > Open Blanket Orders)

Blanket Purchase Order Voiding – Voiding a purchase order created from a blanket order now provides an option to return the quantity to be ordered to the blanket order. This function will help prevent a situation where minimum quantities required for the blanket order are not met.





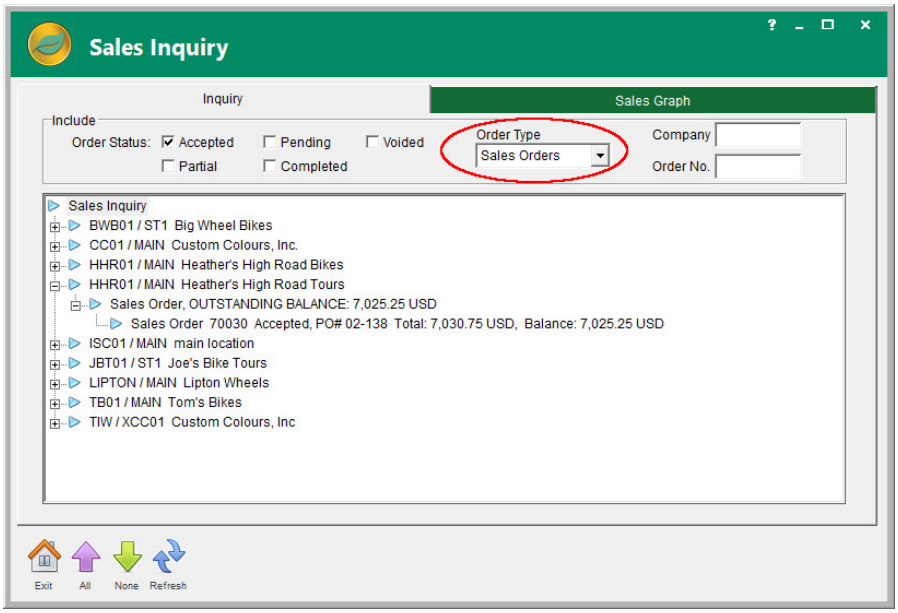
Line Notes for Sales Orders – Double clicking on the Line Notes field on the *Sales Order* screen *Line Item* tab displays the *Line Note* screen. The screen now has a *Notes* button to automatically add the Begin/End Notes format block for automatically sending those notes to a work order.

GL and GL Journal Notes – The Show Notes option on the GL and GL Journal reports has been changed from a Yes/No choice to Header/Detail/Both/No choice. This allows one or both groups of notes to be displayed individually or not at all.

Sales Inquiry Order Type Filter – An Order Type filter was added to the *Sales Inquiry* screen. In addition to the status options orders may be sorted by any document type used in ALERE.

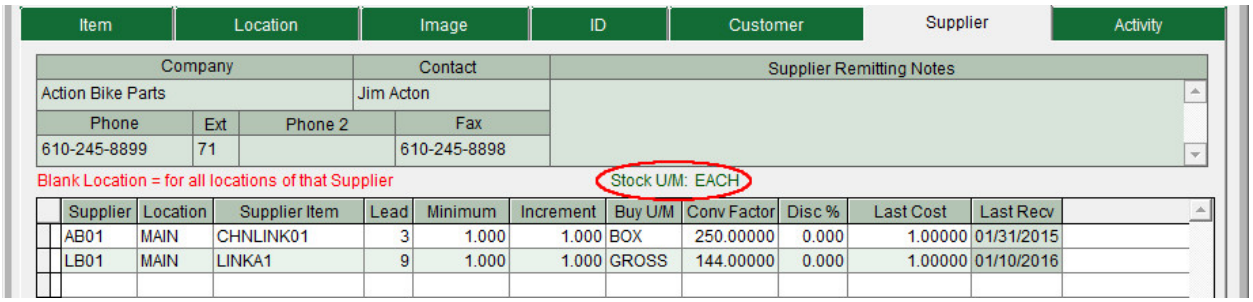
Order Screen GL Postings Sorting – The *GL Posting* tabs of the various order screens can now be sorted by clicking on the column headers.

Totals on Printed GL Journal Entry – Printed GL Journal entries from the *GL Journal Entry* screen now include the total.

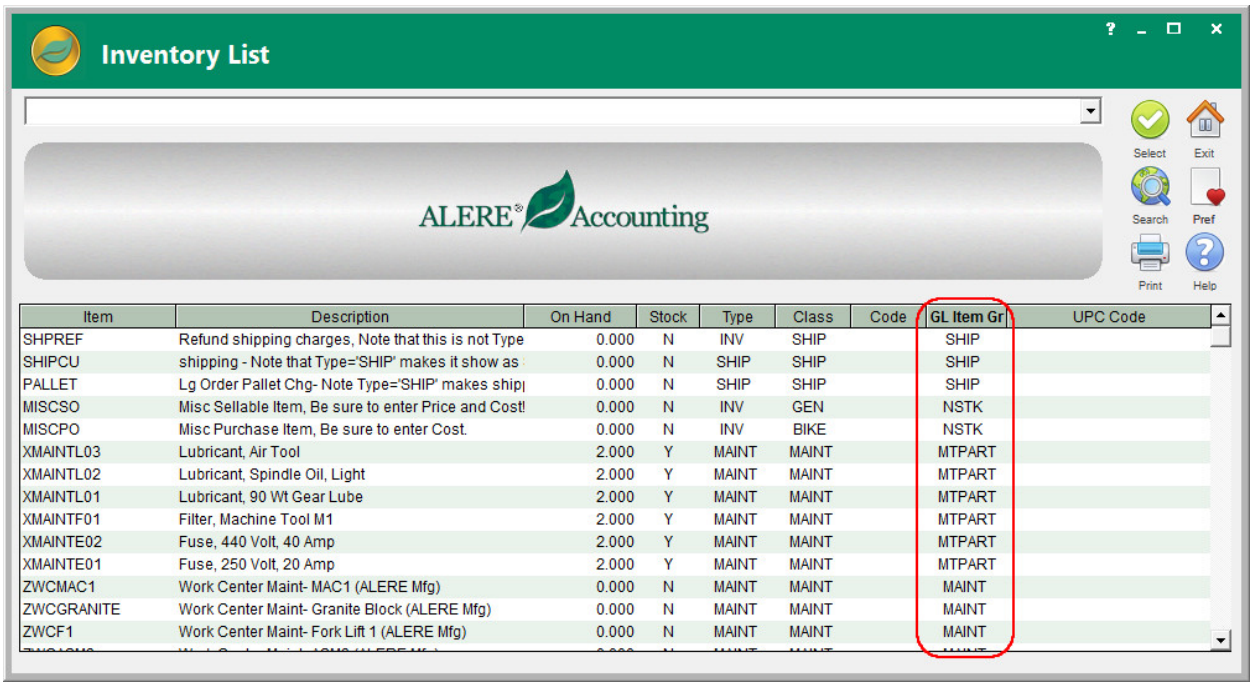


Credit Memo Done Button Added – A *Done* button has been added to Credit Memos. This provides the ability for users to write-off unused credits.

Stocking Units of Measure –The stocking unit of measure was added to the inventory *Item Master* screen *Customer* and *Supplier* tabs in order to more clearly state what the stock units are when setting up the conversion factor for buying or selling units of measure.



New Inventory Browser Sorting Option – The ability to sort items using GL Item Group definitions within the inventory browser has been added.



Inventory Module Item Configurator – Basic modular and variable configuration capabilities have been added to the Inventory Module to support sales order configuration when the manufacturing modules are not present.

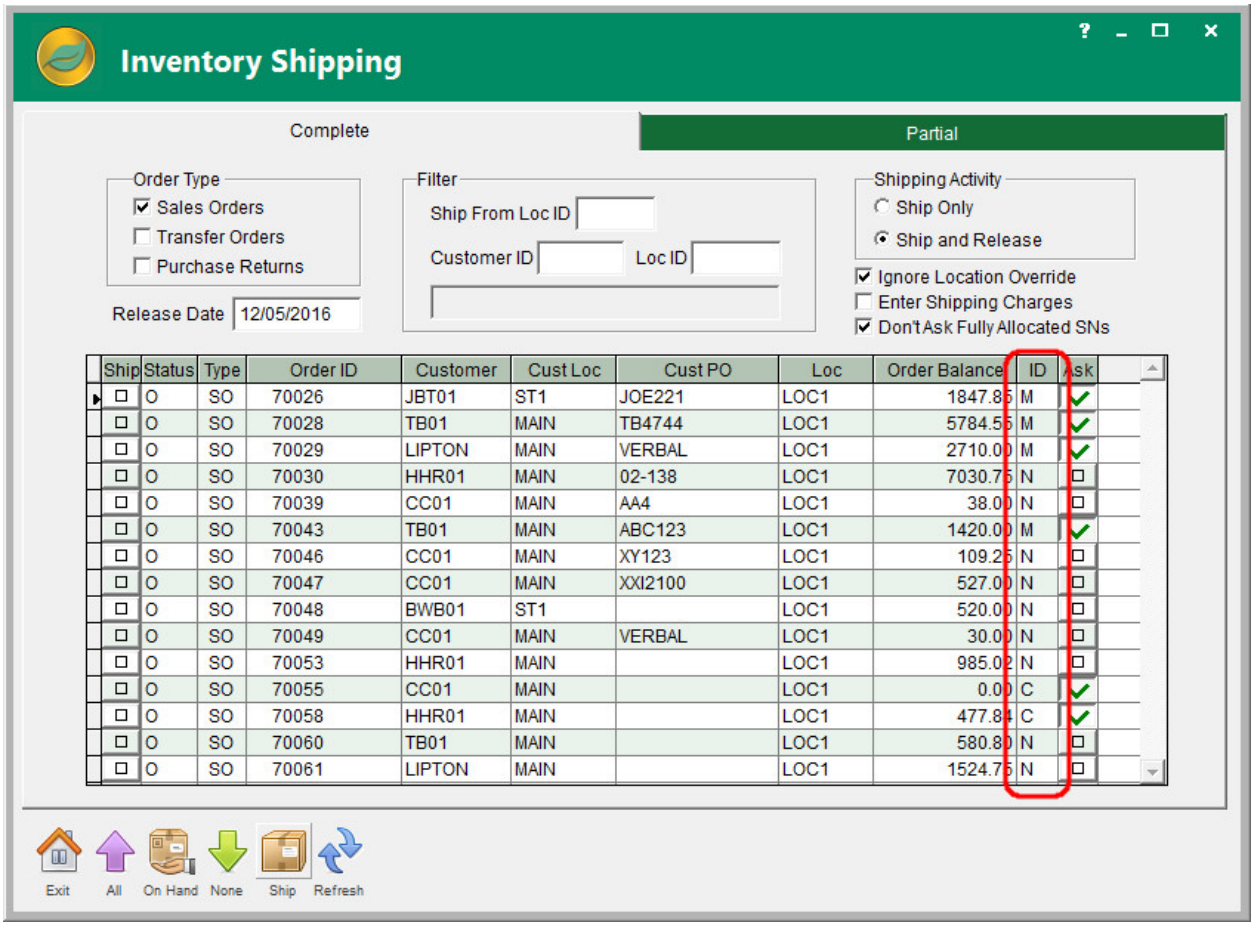
Email Automation Rules for Transfer Orders – Transfer Orders now supports email automation for shipping or receiving.

DAQ Auto-post – DAQ will now automatically post an OS transaction when it is required, rather than only posting an OS when labor is required.

Shipping Screen ID Column Update – The *Inventory Shipping* screens ID column has been updated to identify which items are

- (N) Not serialized or lot numbered
- (M) Serialized or lot numbered but have no specific serial or lot allocated to the order
- (C) Serialized or lot numbered and already has the material allocated to the sales order.

This change provides a visual reference for orders which have had all their serialized or lot numbered materials allocated, allowing for better use of the “Don’t Ask Fully Allocated SNs” option on screen.



Ship	Status	Type	Order ID	Customer	Cust Loc	Cust PO	Loc	Order Balance	ID	Ask
☐	O	SO	70026	JBT01	ST1	JOE221	LOC1	1847.85	M	✓
☐	O	SO	70028	TB01	MAIN	TB4744	LOC1	5784.55	M	✓
☐	O	SO	70029	LIPTON	MAIN	VERBAL	LOC1	2710.00	M	✓
☐	O	SO	70030	HHR01	MAIN	02-138	LOC1	7030.75	N	☐
☐	O	SO	70039	CC01	MAIN	AA4	LOC1	38.00	N	☐
☐	O	SO	70043	TB01	MAIN	ABC123	LOC1	1420.00	M	✓
☐	O	SO	70046	CC01	MAIN	XY123	LOC1	109.25	N	☐
☐	O	SO	70047	CC01	MAIN	XXI2100	LOC1	527.00	N	☐
☐	O	SO	70048	BWB01	ST1		LOC1	520.00	N	☐
☐	O	SO	70049	CC01	MAIN	VERBAL	LOC1	30.00	N	☐
☐	O	SO	70053	HHR01	MAIN		LOC1	985.02	N	☐
☐	O	SO	70055	CC01	MAIN		LOC1	0.00	C	✓
☐	O	SO	70058	HHR01	MAIN		LOC1	477.84	C	✓
☐	O	SO	70060	TB01	MAIN		LOC1	580.80	N	☐
☐	O	SO	70061	LIPTON	MAIN		LOC1	1524.75	N	☐

Late Shipments Report – A new *Late Shipments* report was added to ALERE. The report utilizes the actual ship times, a comparison of actual ship dates to needed by dates to determine the percentage of shipments on time vs late. (Sales > Activity > Late Shipments)

Late Receipts Report – A new *Late Receipts* report was added to the product. (Purchase > Activity Reports > Late Receipts)

Report Changes - Numerous options have been expanded or added to reports. Here is a list:

- *Manager > General > Audit Trail* – The *Audit Trail* report now displays changes made in the User Logins table.
- *Manager > Control > Customers* – The *Customer* report now contains a new Order By option choice of Next Call date.
- *Manager > Control > Bank Reconciliation* – The report will now print even when there is no activity for the month.
- *Sales > General Reports > Pricing Contracts* – A pricing contract report has been added. The report can be accessed through the ribbon or clicking the Print button on a specific Price Contract.
- *Sales > Activity Reports > Invoice Register (Sales)* – The option to exclude freight was added to the *Sales Invoice Register* report.
- *Sales > Process Reports > Queued Sales Orders* – The *Queued Sales Order* report has a new Sales Rep ID filter.
- *Sales > Process Reports > Order (Sales)* - The *Sales Order* report now contains an option to display the internal item number, the customer item number, or both.
- *Sales > Process Reports > Order (Sales)* – An option to run the *Sales Order* report for Blanket Orders has been added. The report includes original, released, and open quantities for the order.
- *Sales > Process Reports > Order (Sales)* – When running the Sales Order report with the 'Type' set to 'Quote', the Shipped Qty/Backorder Qty column is now blank.
- *Sales > Process Reports > Order (Sales)* – The *Sales Order* report now filters out options underneath the phantom parts where the quantity is zero. The phantom will still appear in the report as a zero quantity, denoting the option was not selected.
- *Sales > Process Reports > Invoice* – The *Sales Invoice* report now contains an option to display the internal item number, the customer item number, or both.
- *Sales > Process Reports > Invoice* – There is now an option entitled 'Summarize Shipping' which provides the ability to exclude shipping from the invoice report.
- *Sales > Activity Reports > Sales Analysis* – The Customer ID option has been changed to Customer/Agent ID.
- *Inventory > Control Reports > Master Items* – The *Master Item Detail* report now includes location, safety stock, lead time, and order quantities.
- *Inventory > Activity Report > Lot Expiration* – The Lot Expiration report now has an option to exclude zero quantity lots.
- *Inventory > Control Reports > Current Inventory Balance & As of Inventory Balance* – The Current and As of Inventory Balance reports have a new Order By option choice of Product Class
- *Inventory > Control Reports > Current Inventory Balance & As of Inventory Balance* – Using the 'Order By: Location' option when running the report now places the total for each location at the end of each location's subsection.
- *Purchases > Control Reports > Queued Sales Orders* – The *Aged Payables* report contains a new 'Order by' option choice to allow the report to be sorted by the Supplier Invoice Number.
- *Purchases > Control Reports > Unrecognized Payables* – The *Unrecognized Payables* report now contains a sorting option to show 'Invoiced Only', 'Received Only', or 'All' orders.

- *Purchases* > *Control Reports* > *Open Orders (Purchase)* – A new 'Order By: Supplier' was added to the Open Purchase Orders report. The option sorts the report based upon the 'Remit To' or the 'PO To' address on purchase orders.
- *Finance* > *Reporting Tools* > *Custom Report Generation* – Custom Report Generation contains a new View column that determines if a definition is shown or hidden on the report.
- *Finance* > *General* > *GL Chart of Accounts* – A new Account Filter Rule option was added to the GL Chart of Accounts report.
- *Engineering* > *Process* > *Pick List* – The *Material Pick List* report now has the ability to display barcodes.
- *InTouch* > *General* > *Address Book & Call Sheet* – The option to print 2D barcodes has been added for the Address and Contact information to the *Address Book* and *Call Sheet* reports.

User Rights - New user rights have been added as follows:

- **CRCH** – Cost History Report
- **CRPC** – Manufacturing Overhead Report.
- **OROL** – Operation Library Report
- **PMMR –** Purchase Mass Recurring Orders
- **PRAD** – Supplier AP/DM Details
- **PRLR –** Late Receipts Report
- **SRBO** – Open Blanket Orders Report
- **SRLS** – Late Shipments Report
- **SRPC –** Pricing Contracts Report

User Rights - The following user rights have been removed:

- **BMIN –** Removed and combined into BMIM
- **WSRB –** Removed and combined into WSRC

TIW Technology, Inc.
769 Youngs Hill Road, Easton PA 18040-6726
Phone 610.258.5161 Fax 610.258.6217
Visit our web site at **www.tiwcorp.com**

Copyright © 2017 by TIW Technology, Inc.
ALERE and ALERE Leaf Logo are trademarks of TIW Technology, Inc. All rights reserved