ALERE® Business Applications

New Features

REVIEW OF NEW FEATURES AND CHANGES IN THIS RELEASE

November, 2020   **ALERE® Version 16.0**

Financial New Features

Shopify Integration – Pass orders that are taken in Shopify directly into ALERE for shipping and invoicing processing! Update Shopify with available product quantities and pricing! Keep customers apprised of order status with automatic emails! Use ALERE's mass order picking and shipping capabilities to smoothly fulfill orders! Items in inventory that are offered for sale on Shopify are automatically labeled for eCommerce.

Over Shipping - When over shipping is allowed, there is an option to issue what is on hand or to select from an alternate location.

Inventory Adjustment Filters – Filters for *Store*, *Bin*, ID Status, *ECO Code*, and *User Miscellaneous Field 10* have been added to the *Adjust Inventory Set* tab.

TaxJar Links – Use TaxJar to look up sales tax information from over 14,000 tax districts and apply the applicable sales tax on a sales document. The links include options to create new ALERE tax tables and to update existing tables.

Inventory Location – When the default supplier is set on the *Location* tab of the *Inventory Master* screen, an existing record on the *Supplier* tab is updated. Conversely, if a supplier is deleted from the *Supplier* tab and the supplier is set as the default on the *Location* tab, then that default is deleted.

UPS Information – Declared value can now be added on the UPS *Shipment* screen. If a value uses a different currency than the default for the company, that currency can be entered.

Reprint UPS Labels – A *Recover* button has been added to the UPS *Shipment* screen that allows shipping labels to be printed.

Sales Order Recalculations – An option to recalculate all line item pricing from inventory has been added to sales orders using the **Load** button. This allows pricing to be recomputed using any pricing rules but based on the current inventory regular price list rather than the regular unit price saved on the order.

Mass Customer Statements – A choice has been added to the *Mass Emailing Print* screen to print the statements for any customers without defined email addresses.

Reverse Receipts – A *Reverse Receipts* order function has been added to inventory *Transfer Orders*. This function allows receipts to a company to be reversed in the same manner that shipments from a company can be reversed.

Physical Inventory Printing – The **Print** button on the *Physical Inventory Count* screen now only sends the current screen information to the printer.

Mass Picking – The ability to filter items by their date needed has been added to *Mass Picking*.

Direct Debit – One or more direct debits can now be recorded on the new *Direct Debit* tab of the *Mass Payments* screen that has been added. The debits may be either summarized by supplier or recorded separately.

Sales Blanket Orders – Now if a quantity is changed on a sales order created from a blanket order, the blanket order is updated with the correct remaining quantity.

Physical Inventory Fill Button – A **Fill** button has been added to the *Adjust* tab of the *Physical Inventory Count* screen that will automatically check all items that are present on the *Entry* tab.

Email Option – When a user is set to use Outlook and the *Email* option is selected on the *Company Profile Contact Log* screen, the email can be optionally saved to the notes field.

Restoring Inventory Items – An inventory item can now be restored from an archive company by using a right click on the **Load** button when adding the item.

Cloud Sync Program – The cloud synchronization program is automatically paused when running system functions like packing and reindexing, file updates, during a system lock, etc.

Prospect Locations – Prospect companies now support multiple company locations and when a prospect is converted to a company, the different locations are included.

Service Orders – The *InTouch Orders* screen now includes service orders.

InTouch Company Profile – A checkbox to control the listing of *Service Tickets* on the *Orders* tab has been added to the screen.

Profit Analytics - Profit analytics is designed to provide information about the profitability and revenue of inventory items and their trends over time.
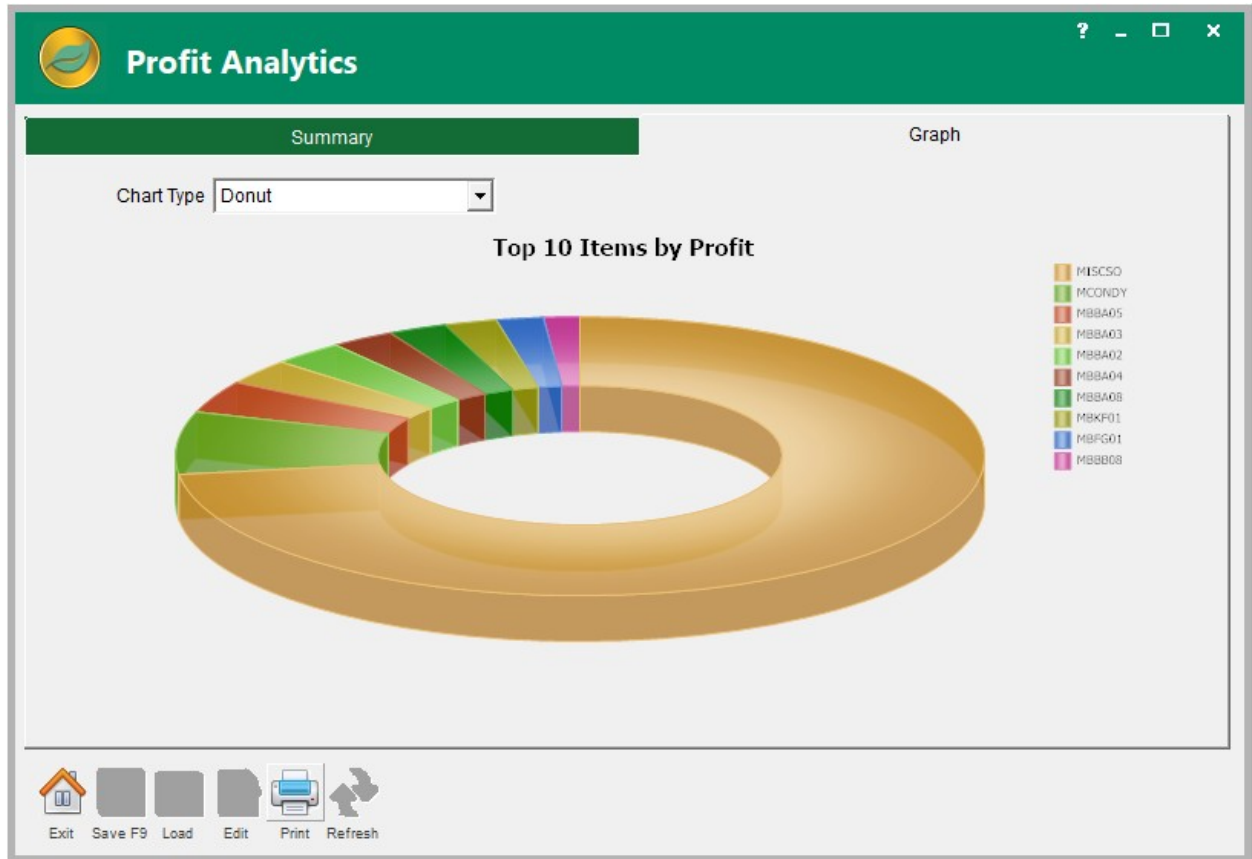
Mass Email List Rules – Two new options are a checkbox to include contacts with blank email addresses and a filter to list companies based on their active status.

Operation Step Emails – A checkbox has been added to the *Route* tab of *Work Orders* to confirm on which operation steps internal emails should be sent with the posting of an *Operation Start* or *Operation Complete* transaction.

SW08 Schedule Error – The *Errors in Schedule* screen now allows operation steps with this error to post an IP transaction of "0" on these steps. This permits the scheduler to reschedule the step from this point forward instead of simply marking the work orders as complete.

BOM Import Utility – This utility now allows importing multiple revisions at once.

Transfer Order Planning - The planning process has been enlarged to treat different locations as suppliers. This permits material planning for transfer orders among the different locations for raw materials, manufactured sub-components, and finished product. To support this capability, the *Generate Recommended Transfer Orders* screen has been added to handle material movements among the different locations.

Generate Recommended Transfer Orders

Recommended Transfer Orders List

Gen	Sep	Order	Ship From	Recv Loc	Item	Needed Qty	Order Qty	U/M	Need By
☐	☐	T00001	LOC1	LOC3	MBPD02	105.000	0.000	EACH	11/12/2020
☐	☐	T00002	LOC1	LOC3	MBPD02	100.000	0.000	EACH	01/07/2021
☐	☐	T00003	LOC1	LOC3	MBPD03	114.000	0.000	EACH	11/12/2020
☐	☐	T00004	LOC1	LOC3	MBPD03	200.000	0.000	EACH	01/07/2021
☐	☐	T00005	LOC1	LOC3	MBPD04	105.000	0.000	EACH	11/12/2020
☐	☐	T00006	LOC1	LOC3	MBPD04	100.000	0.000	EACH	01/07/2021

Filter [None ▼]

☐ Use Order Minimum/Increment
☐ Combine Dates

New Order Status
○ Accepted   ● Pending

Tagged [0] of [6]   Transfer Orders Generated [0]

Exit Generate All None Print

Multiple Sales Orders Detail – A detail screen will now display the sales orders, line numbers, and quantities for recommended work orders that have been generated by the planning process when there is more than one sales order making up the demand. Double clicking on *MULTI SO* in the *Sales Order* column on the *Generate Recommended Work Orders* screen will bring up the detail screen.

Variable Phantom BOM – A Variable Phantom combines the capabilities of a Variable BOM item with a Phantom BOM item. This BOM enhancement allows an assembly, on a bill to ask how many are required during the sales order configuration process and have that quantity applied to all components that make up the assembly.
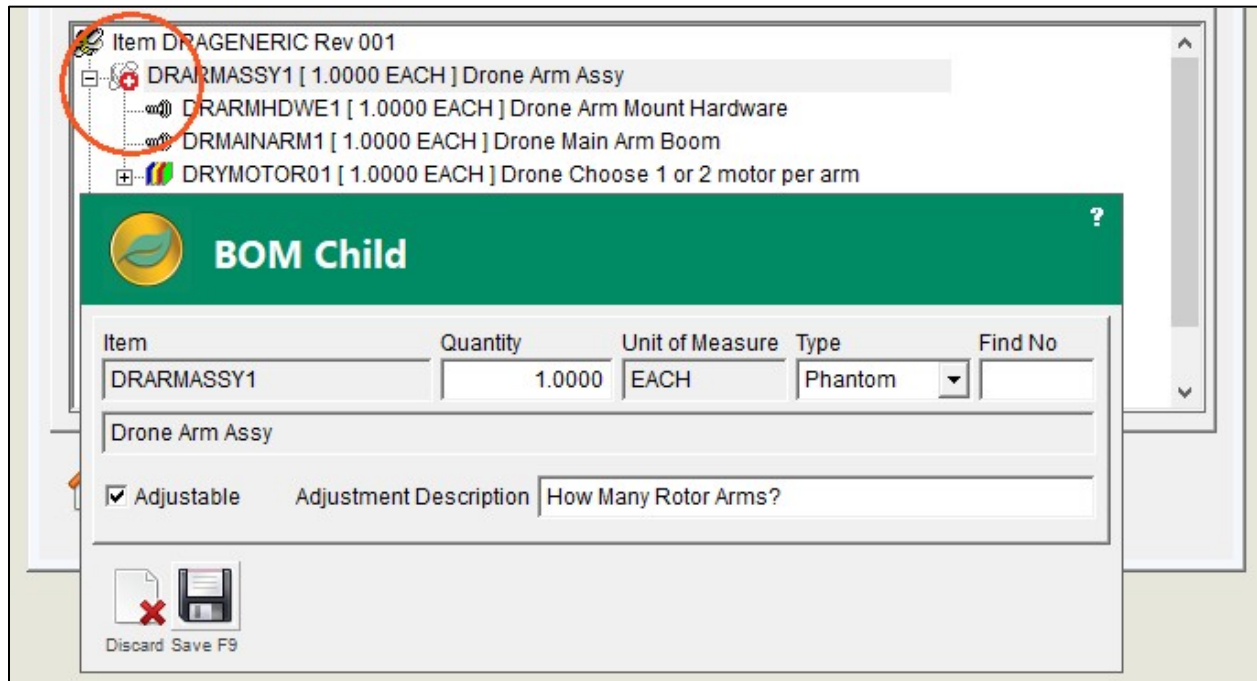
Adjustable Raw Material BOM – This ability permits the quantity of selected raw material items to be entered when a BOM is configured.
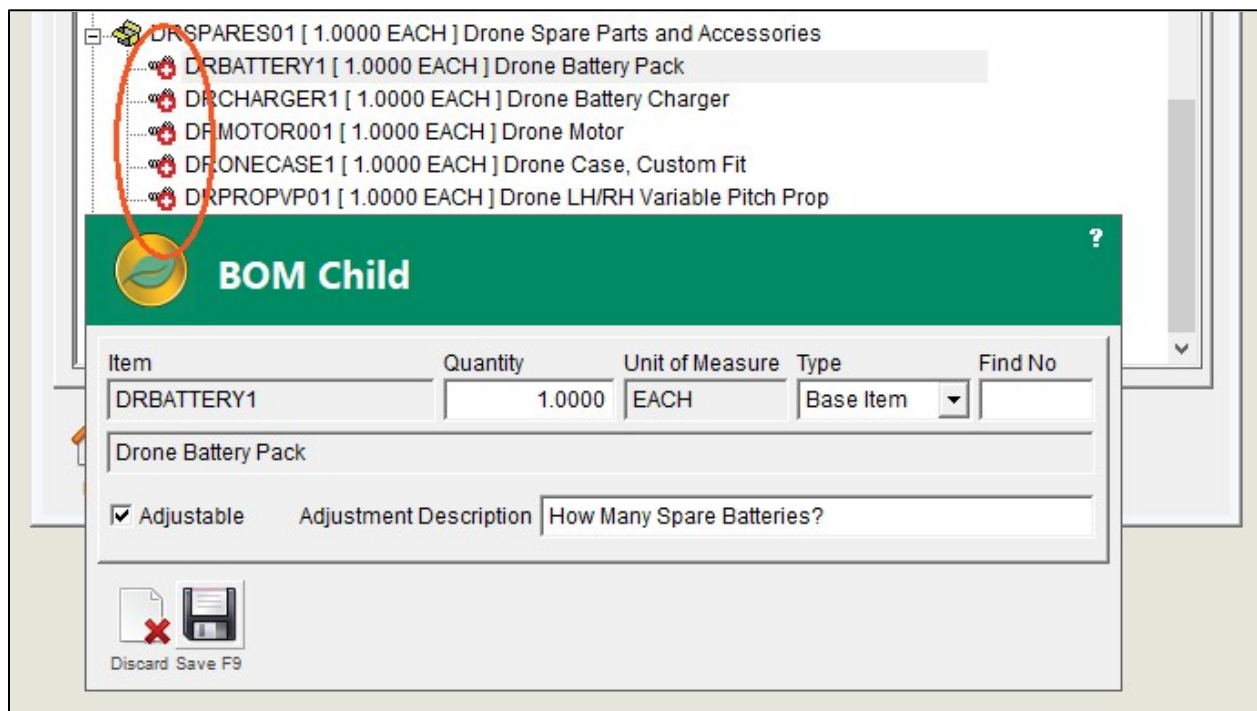
2-Dimensional Formula BOM – The BOM structure is expanded to allow a quantity for an item to be entered and another quantity to be requested on the indented level below the first. This may be repeated for multiple indented levels, thus permitting computations to be executed to find surface areas or the volume or weight to be found and applied.
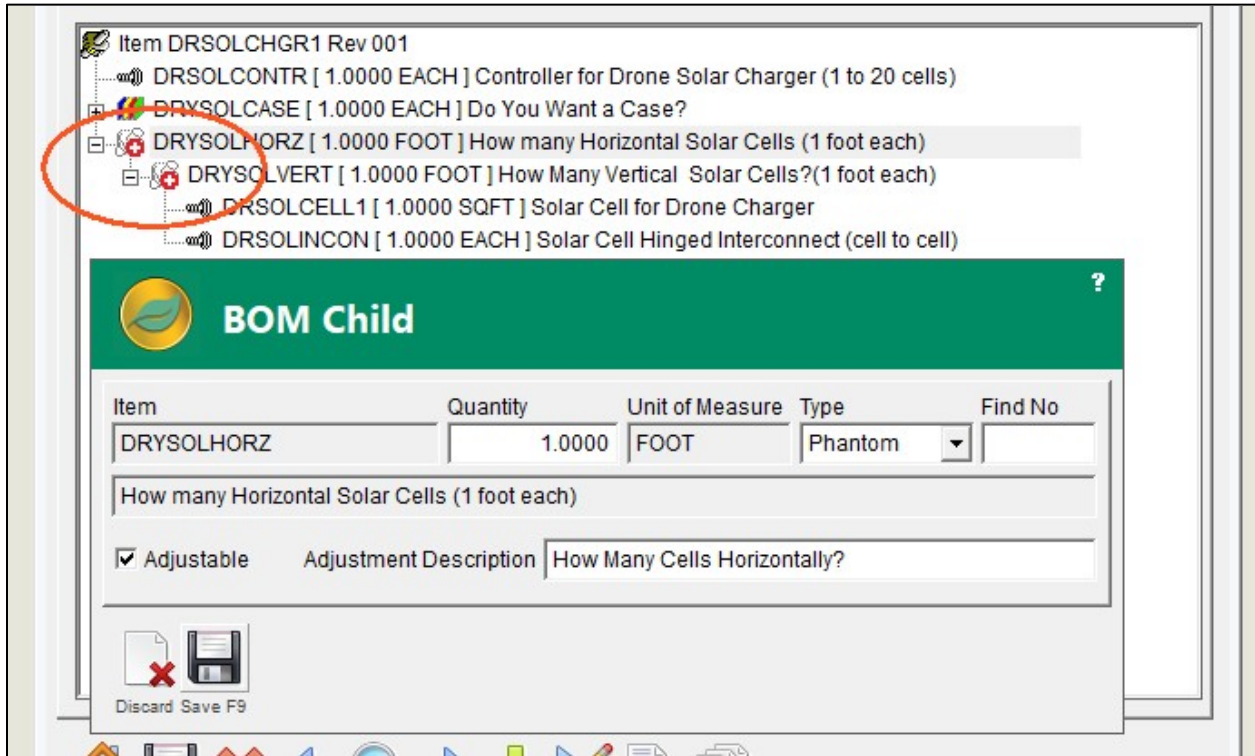
Remove Items – Now items can be removed from work order material lists by using the *Scan* button, selecting the *Add Material* transaction, and entering a negative quantity.

BOM Item Tooltip – A tooltip has been added to the **Parent Item** field on the *BOM Master Header* to display the **User ID** of who added the BOM and when it was first added to the system.

Service New Features

Clearing Dispatch – A way has been added to clear the schedule of jobs in the past that have not yet been completed. On the *Dispatch Board* and the *Service View*, selecting the **Del** button presents an option to remove uncompleted tickets based on a date range.

Service Ticket Release Options – On the *Release* tab, the *All* and *None* buttons now operate differently based on a right or left click. A left click will continue to operate as before by checking/unchecking units on the grid. The right click will now operate by checking/unchecking the *Zero Charge* filters. A tooltip will be displayed when the cursor hovers over the buttons.

Editing Resources – Resources can now be added, deleted, or have their quantities changed on the *Service Ticket* screen *Resource* tab. Added resources can have varying charge types. Resources now appear on *Pending* tickets.

Checking Work – Buttons to view scheduled work on the next day or previous day have been added to the *Service App* for technicians.

File New Features

Date/Time Options – A new option has been added to *Company Defaults General Options* to always post the Service and Manufacturing transactions at the current date and time.

Creation of PDF's Control – A new option on the *Company Defaults Option* tab allows PDF's created from order screens to be stored in the *Company Document Path* or in the report PDF export path defined on the *Default Paths* tab.

Sales Price Rounding – A setting has been added to the *Accounting* tab on the *Company Defaults* screen that controls the number of decimals to round to when prices are returned from the pricing rules.

Excel to Export Choices –*User Logins* now has four Excel export options to choose from on the *Settings* tab. The first is *Excel 64/32-bit Workbook (*.xlsx).* It removes dollar signs and allows for the Excel sheet to be opened after the export. The second is *Excel 32-bit Workbook (*.xlsx).* It does not perform like the first option but still creates an xlsx format and is faster. The *Excel 97/2000 Workbook (*.xls)* choice is included for backwards compatibility and is significantly faster than first two options. The *Excel 5.0/95 Workbook (*.xls)* is included for backward compatibility and is significantly faster than the first two options.

Active Users – The total count of active users has been added to the bottom of the *Active Users* screen. Also added is the ability to sort the columns by user.

Management New Features

Document Management – Document management capabilities have been expanded by adding *Document* tabs to the *Customer* and *Supplier* screens for installations that include the **InTouch** module.

Email Automation Rule Additions – Internal emails may be sent when an *Operation Start* or *Operation Complete* transaction is posted to a route step on a work order or on a service ticket when a *Unit Complete* is posted.

Company ID Tooltip – A tooltip has been added to the **Co ID** field on the *Location* tab of the *Company* screen in *Manager* to display the **User ID** of who added the company and the date of when the company was first added to the system.

Spell Checking – Memo fields have had spell checking added through the right click menu in the memo field.

Global Codes Import – A new *Import* button has been added to the *Global Codes* screen to import code definitions from Excel.

Company Import - A new *Import* button has been added to the *Company* screen *Locations* tab to import customer or supplier information from Excel.

Payment Terms Import - A new *Import* button has been added to the *Payment Terms* screen to import terms information from Excel.

Display Currency – The currency to display can now be set and saved for each checking account.

Bank Reconciliation Currency – The currency in which to display the bank reconciliation can now be selected for both the *Bank Reconciliation* screen and the *Inquiry* screen.

Company Location - A company's address can now have their county included, which may be important to support sales taxes.

Restoring Archived Companies – Companies can now be restored from an archived company by selecting the *Restore Company from Archive* option on the *Add New Company* screen.

Return Deposit – On the *Bank Transaction* screen there is now an option called *Returned Deposit* as a way to process a deposit return.

Lock New Revisions – There is now an option to prevent a new work order revision from being processed on the *Company Defaults Option* tab under *Manufacturing Options*.

Sales Pricing Decimals – On the *Company Defaults Accounting* tab a field allows the setting of price decimals for prices returned from the pricing rules.

New Reports and Changes

Manager > Control > Suppliers - The **Supplier ID** has been added to the report output.

Manager > Control > Bank Accounts – A new display option called *Default*, will allow all accounts to be shown in their associated currency. Selecting a currency type for an account will apply to only that account.

Manager > Control > Customers – A tax exempt date range has been added as an option to the report.

Sales > Process > Pick Ticket (Sales) – The **Location** combo box has a new option called *Non-Excluded* which will include only those locations that are not marked as excluded on your company screen in the report.

Sales > Reports > Activity – A new report called *Sales Tracking Numbers* has been added. Its purpose is to report on UPS tracking numbers.

Sales > Control > Sales Tax Listing – An option to filter the report by drop ship items, exclude those items, or include drop ship items has been added.

Purchases > Process > Approved to Pay – The option to order by the **Document ID** has been added to the *Order By* option list.

Purchases > General Reports > Supplier List – The **Supplier ID** has been added to the report output.

Purchases > Control > Aged Payables – The *Matching Receivables* option now includes customer prepayments as well.

Purchases > Control > Unrecognized Payables – An option to control how the report is to be ordered has been added.

Inventory > Activity > Adjustments Journal – The report now has an option to filter its activities by *Physical Inventory Count*.

Inventory > Control > Current Inventory Balance – A new option has been added that allows the report to be filtered by its active status.

Inventory > Control > As of Inventory Balance – A new option has been added that allows the report to be filtered by its active status.

Inventory > Activity > Lot/Serial Disposition - The *Detail* option creates the report in landscape orientation and includes information on location, store, and bin.

Finance > Compare > Account Budget Compare – A new option has been added to this report to include or exclude inactive accounts.

Finance > Financial > General Ledger – An option has been added that allows the report to be generated with the year end balances for revenues and expenses to be zeroed out.

Extensions > Multi-Currency > Reports > Payable Aging – A new option named *Display Amount* has replaced the *Show Amounts* option. It permits the report to be displayed in the base currency as it is now, the base currency as it was then, or as a selected foreign currency.

Extensions > Multi-Currency > Reports > Receivables Aging – A new option named *Display Amount* has replaced the *Show Amounts* option. It permits the report to be displayed in the base currency as it is now, the base currency as it was then, or as a selected foreign currency.

Production > Process > Pick List – The work order revision number and revision notes are now displayed on the report.

Production > Process > Work Orders – The work order revision number and revision notes are now displayed on the report.

Logistics > Report > Material Shortage – The report may now be filtered for the order needed dates.

New Permissions

MMPI – Profit Analytics Screen

PMDD – Mass Payments Screen Direct Debits Tab

PMGT – Generate Transfer Orders

SRPE – Sales Customer Price List Report

SRTK – Sales Tracking Numbers Report

WSCS – Shopify Link