



# **ALERE®** Business Applications

The all-encompassing nature of ALERE® is built around robust financials. ALERE® not only has that in spades, it goes where most other packages do not with a real-time general ledger supported by a depth of online traceability rarely encountered. No manual input is required for a period closing as it is automatic.

With document management designed into ALERE®, one can start at the graphical chart of accounts and drill down to display an original receipt or bill in just four screens.

Each sales or purchase order has access to its complete life cycle, from quote to payment, accompanied by every related general ledger journal entry.

ALERE® has a manufacturing aspect that is so sophisticated that it does "synchronous manufacturing," This means that it can tell you what list of materials to deliver to what work center for what job on what day and hour.

The entire manufacturing process is transaction based for complete traceability.

Data collection and bar coding is integrated into the backbone of ALERE®. It enhances productivity and decreases errors by handling all inventory receipt, shipping and transfer movements, supporting physical inventories, and tracking manufacturing transactions and labor postings.

InTouch is a CRM application that places you in control of your relationships with prospects, clients and suppliers. It will log all of your interactions, keep a list of promised tasks, and manage your itineraries with real-time Microsoft® Outlook two-way links.

InTouch supports your marketing campaigns by executing and managing mass email campaigns and managing direct mail lists.

# Software Functionality Summary

## PLATFORM

- Cloud – client/server – LAN utilizing one code base supporting mixed companies (client/server and LAN) on one menu including unique company modifications
- Multi-tier object-oriented architecture – multi-level product customization – data-driven definition elements – user hooks/custom code – languages – lingo
- Inheritance modification strategy makes customizations portable to ongoing product releases

## COMMON PRODUCT DESIGN

- MDI (multiple document interface) with dynamic screen sizing
- Real-time processing including general ledger and data collection
- Hyperlinks internally for data elements, screens, documents, etc. and externally for websites, PDFs, video, etc.
- Document management
- Data drilldown
- Data browsers search with conditional statements, sort data, print or export data, retain preferences by user and have “persistence,” which allows detailed examination of multiple records with one instance of the browser
- Fetch search tool with desktop availability and provides access to entire data spectrum
- Automatic notifications based on defined event triggers and using native email capability
- One-point entry of companies and all related information for prospects, customers, suppliers, etc. supported
- Multicurrency throughout supporting exchange rates, exchange variances and rate history backed by graphs
- Data archiving that provides continuous company history, with optional data reduction, for data mining
- User-defined fields and notes allowing for easy customization for collecting company or industry-specific data
- Screen and reporting engines that support printing, PDF creation, export to Excel, and emailing

## CRM (Customer Relationship Management)

- Manages prospects, customers and suppliers with emphasis on people rather than companies
- Logs contacts (emails, phone calls, visits, etc.), makes appointments and tracks tasks
- Prospect contacts/companies managed separately from customers and supplier contacts/companies
- Imports prospect information from Excel
- Creates and tracks prospect quotes, which may be released as sales orders or invoices
- Converts prospects into customers, with use of standard company templates, and includes prospect history
- Management of marketing email and direct mail campaigns
- Real-time links with Outlook and mobile devices
- CRM, as a core function within ALERE®, allows access to the tools and data of the entire ERP product, providing superior benefits to a standalone CRM package

## SALES

- Complete order documentation on one screen for order entry, processing, related activities trail and GL postings
- Encompasses quotes, sales orders, sales invoices, consignment, return orders, credit memos, blanket orders, recurring orders and price contracts
- Online order-approval process supporting multiple authorization levels and automatic notifications
- A “pending” order status allows entry without order becoming active in the system
- Individual lines on orders accommodate a choice of functions (sale/drop ship/return/credit/freight/finance), which permits one order to serve multiple purposes
- Online rules-based sales order configuration
- Kitting/de-kitting with variable choices
- Mass acceptance of orders, mass invoicing and mass emailing of statements
- Direct sales order to purchase order generation
- Sales team support with live order filtering and commissions
- One-button conversion of credit memos to payables
- Distribution of payment to multiple invoices across company locations





## PURCHASES

- Complete order documentation on one screen – PO entry, processing, related activities trail and GL postings
- Encompasses quotes, purchase requisitions, purchase orders, blanket orders, recurring orders, return orders, payables and payments
- Online order-approval process supporting multiple authorization levels and automatic notifications
- Pending status orders allow entry without becoming active in the system
- Multiple-function order line items (purchase/return/credit/freight) permitted simultaneously on single order
- Single and mass payments, approval and check printing

## INVENTORY

- DRP (distribution resource planning) including automatic purchase order creation and sales order planning
- Average, standard, LIFO and FIFO support
- Inventory item characteristics such as safety stock, reorder points, order sizing, units of measure, weight, cost, pricing, etc.
- Inventory support for location, store and bin
- Lot/serial number/trace capability with lot inspection and expiration serial numbers within lots
- Cross-references for supplier and customer item numbers
- Transfer orders for moving inventory between locations, complete with paperwork and instant movement
- Bar coding and data acquisition for receiving/issuing/moving inventory
- Actual and future inventory activity tracking including item level activity tracking



## GENERAL LEDGER

- Automatic period closings with real-time postings provides up-to-date, on-demand reporting
- Up to 99 definable periods
- Alphanumeric six-segment chart of accounts up to a total of 24 characters wide and using TreeVision (an Explorer-like graphical interface) to create, navigate and drill down
- Extensive reporting including 12-month comparisons, user-defined date range comparisons, account filter rules and custom report generation
- Multi-company consolidation
- Budgeting optionally integrated with Excel
- Journal entry distribution templates
- Journal entries that can be pending, recurring or reversing

## BUSINESS INTELLIGENCE

- Seamless data mining of current and archived data combined into one report automatically
- Analytics for customer/supplier/item/inventory movement/general ledger all supported by 3D graphical analysis
- Geographic “hotspot” plotting for sales/companies/distance
- Sales analysis including configuration data mining

## MOBILITY

- Web development support with selectable data uploading to the Cloud and definable synchronization intervals
- Management of mobile devices through the Cloud
- Sales Call Sheet App for smartphone or tablet (Android or Apple), providing timely sales information available to sales force
- Documentation and examples to develop custom apps
- Login options that permit access to filtered contact and sales data based on user permissions



## DATA ACQUISITION

- Scanning is done in real time and is interactive with the operator through a “prompt” process
- Uses wedge scanners or scanners running under terminal services
- Entering and shipping items on a sales order
- Receiving items on a purchase order
- Doing inventory movement and adjustments
- Posting transactions to manufacturing work orders
- Tracking time and attendance
- Inquiries on the stocking levels of items
- Print item labels
- Item locations, lot numbers, serial numbers and traits support

## MANUFACTURING

- Extensive support for build-to-stock or build-to-order processes
- Material requirements planning (MRP) is single pass through all BOM levels, with a choice of either time-phased data or monthly/weekly time periods, and can include pending (forecasted) orders
- On-demand MRP for sales orders and single items
- Recommended work orders/purchase orders calculated, presented for review/edit and then optionally released for creation
- Push/pull planning with automatic execution of order updates
- Concurrent work order forward/backward finite scheduling, including operation overlap and yield/scrap calculations
- Graphically presented schedule of orders or work centers, with shrink/enlarge timeline scale, can be manually edited
- Factory loads by order, item, customer or work center available using 3-D graphics
- Advanced synchronous manufacturing techniques tie material planning to production planning, which supports real-world JIT
- Indented bills of material (BOMs) graphically constructed and maintained with support for modular, variable, component, phantom, alternate, disassembly, kit bill types
- BOM revisions with active/inactive dates
- BOM association with finished good configurations
- Disassembly and return to stock, with item level editing, for BOMs, work orders and sales order line items, and return orders
- Transaction-based work orders with routing/material list/configuration/ID tracking/image capabilities
- Assemble/build/maintenance/rework type work orders
- Preventative maintenance incorporated into material planning and scheduling
- Analysis of machine downtime
- Routing creation supported by library of operation steps, separate setup/operation times and machine centers
- Route/material association by operation step
- Analysis of actual routing data with optional updating of master routes
- Work center capacities with efficiencies/alternates/online dates
- Cost analysis for both planned and actual work orders
- Fixed and variable overhead costs applied using six costing methods with general ledger support
- Rolled up BOM/route/overhead costing by indented level and total, including automatic updating of inventory standard and actual costs, and general ledger adjustments

