May 2022   ALERE® Version 17.0

Job Cost Module

 A new Job Costing module was added to the product. The ALERE Job Cost module provides a structure that allows the accumulation of costs associated with a complete job. These costs may include expenditures acquired from purchase orders, service tickets, and work orders. The cost data is collected for material, labor, and overhead and can be compared to budgeted amounts.

The ALERE Job Cost module can group purchase orders, service tickets, and work orders to provide summary costs for a job.

On the default ALERE ribbon, the ALERE Job Cost module screens and reports are located on the Manager tab. There are three primary screens in the module. They include the Time Clock screen, the Job Master screen, and the Job Quotes screen.

Jobs are identified with a unique ten-character Job ID. The Job Master screen is used to define the job characteristics, including the job description, team leader, customer, associated Sales Order (optional), and other miscellaneous data.

Budgets can be established for each job. These budgeted values can be compared to projected and actual costs. Completion percentages can be computed for the entire job.

Purchase Orders, Service Tickets, and Work Orders can be linked to a Job by entering the Job ID on each order document. Alternately, the Job Master screen Orders tab can be used to establish the link for each order. This allows extra flexibility in the way a job is defined.

The Job Quotes screen can generate Requests for Quotation (Purchase Quotes) from multiple suppliers. The screen can also record the prices quoted in response to RFQs on the original Purchase Quote document. Multiple quotes can be compared, and Purchase Orders can be created based on selections made by the user.
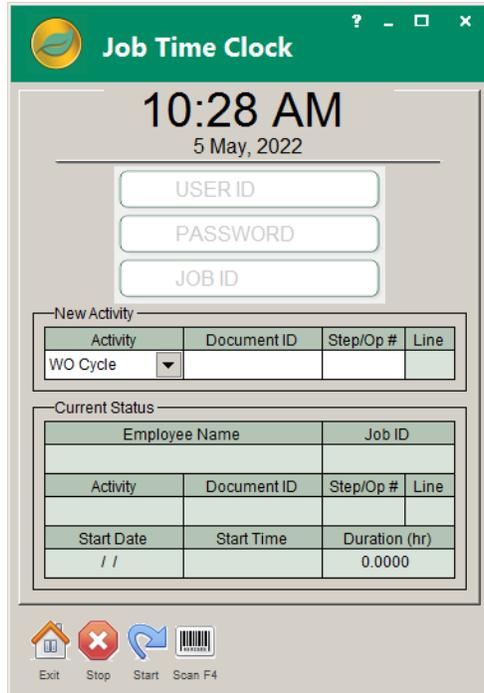
The ALERE Job Time Clock screen allows users to start and stop individual timers. Recorded time can be posted to open work orders or service tickets.

There are five reports in the Job Cost module: Jobs Listing, Job Quotes, Cost to Complete, Job Time Analysis and Work in Process.

Performance Enhancements
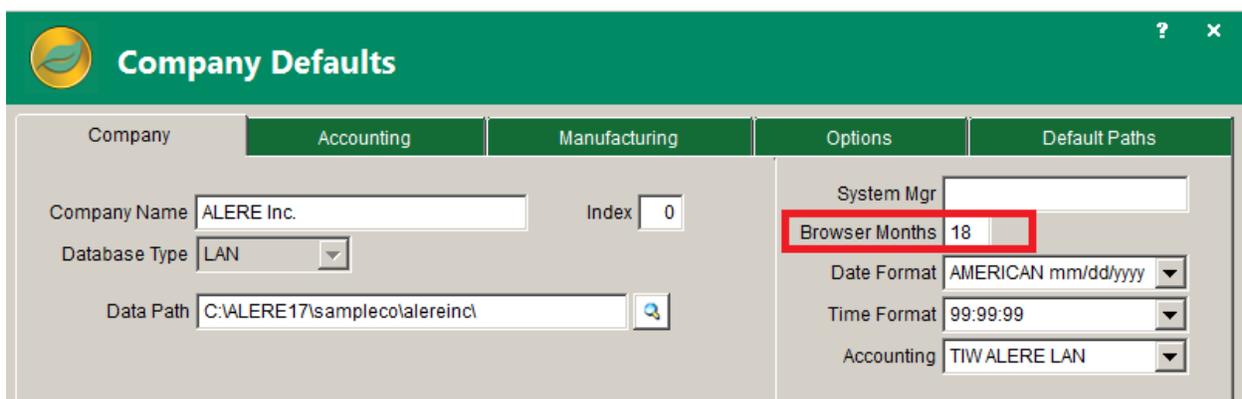
The speed of ALERE, especially the Client/Server version, was improved throughout the product. There is also a new *Browser Months* option on the Company Defaults screen Company tab. This will limit the display to only the entered number of months of data in many product browsers. Right-clicking on the *Get* button and then pressing the *Search* button will still display the entire list for when older data needs to be accessed. This will speed up the browsers for companies with large data sets.

Location	Store	Bin	Quantity	Location Description	
LOC1			25.000	ALERE Inc Corporate HQ	
LOC2			10.000	ALERE Inc Warehouse #2	
LOC3			0.000	ALERE Inc Drop Ship Location	
LOC4			0.000	TIW Technology Mobile Truck	
LOC5			0.000	Scrap Location	

☐ Include zero on hand

Exit	Save F9	Del	Bwd	Loc Bwd	Get F8	Loc Fwd	Fwd	Add F7	MRP	Refresh

Allocated: 0.000
On Order: 5.000
Available: 30.000

Inventory MRP Button - A new MRP button was added on the Location tab of the Inventory Item Master screen to bring up the Item MRP Planning screen for that item and location. (Inventory>Item Master)

Item Master - AGENERATOR
Emergency Generator (Lot Costed, Serial, Traits)

| Item | Location | Image | ID | Customer | Supplier | Activity | Documents |

○ Changeable ID Items   Filter Criteria None ▼ None ▼ None ▼

● Show All Items   Filter Condition (Partial) ▢ ▢ ▢

▷ Item: AGENERATOR   Emergency Generator (Lot Costed, Serial, Traits)
⊟···▷ Location: LOC1,   Store: Blank,   Bin: Blank,   Qty: 3.000
　　⊞···▷ VOLTS: 230/1PH   KW: 10KW   SWITCH: MANUAL,   Qty: 1.000
　　⊞···▷ VOLTS: 230/1PH   KW: 15KW   SWITCH: AUTO,   Qty: 1.000
　　⊞···▷ VOLTS: 440/3PH   KW: 15KW   SWITCH: NONE,   Qty: 1.000

| Exit | Save F9 | Del | Bwd | Get F8 | Fwd | Add F7 | Id | Label | Refresh |

Inventory Label Button - A new Label button was added to the Inventory Item Master screen ID tab to print the item's Lot/Serial Number labels. (Inventory>Item Master)

Import Header Notes - When importing General Ledger Journal transactions from Excel or a CSV file, the Post Note column of the first row can now be used to import Header notes.
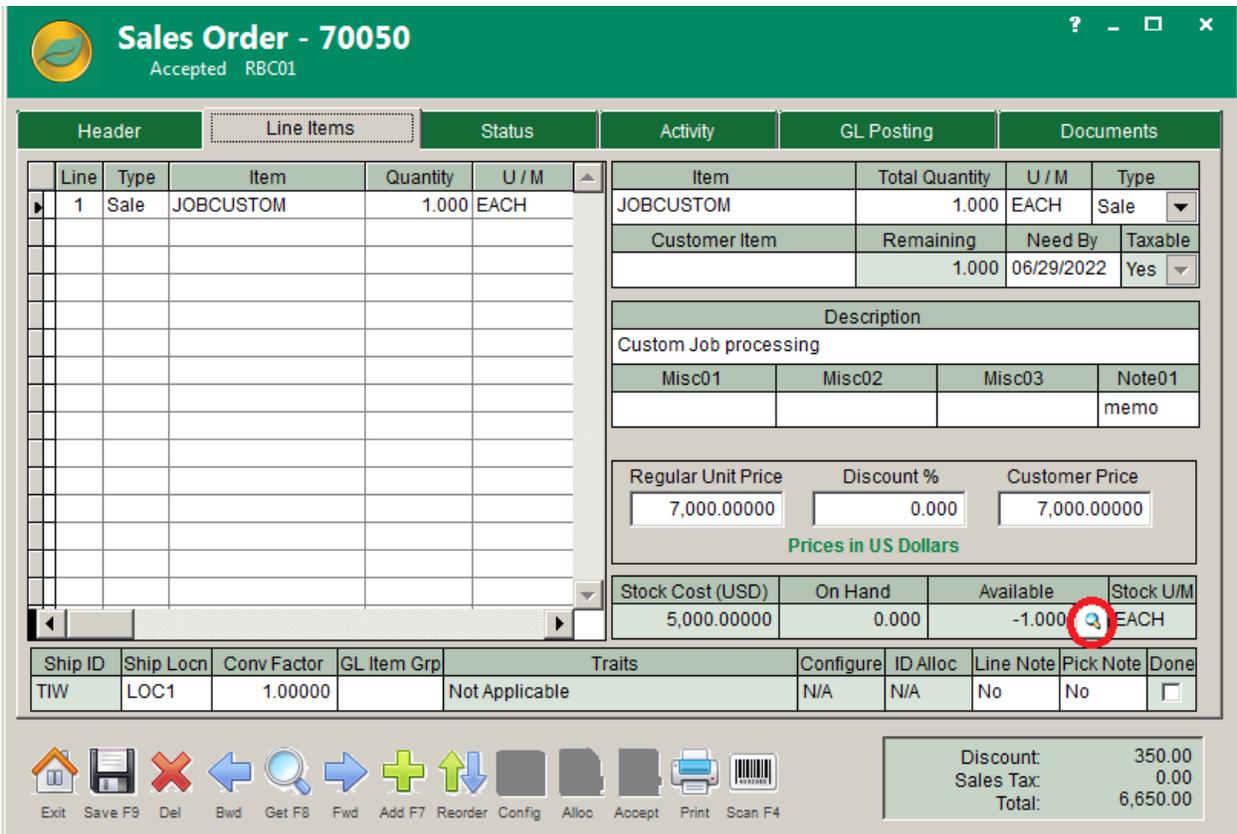
Detail Button - A new detail button was added to the Sales Order screen Line Items tab next to the Available Quantity field. This button will bring up the Item MRP Planning screen for that line item. (Sales>Sales Orders)
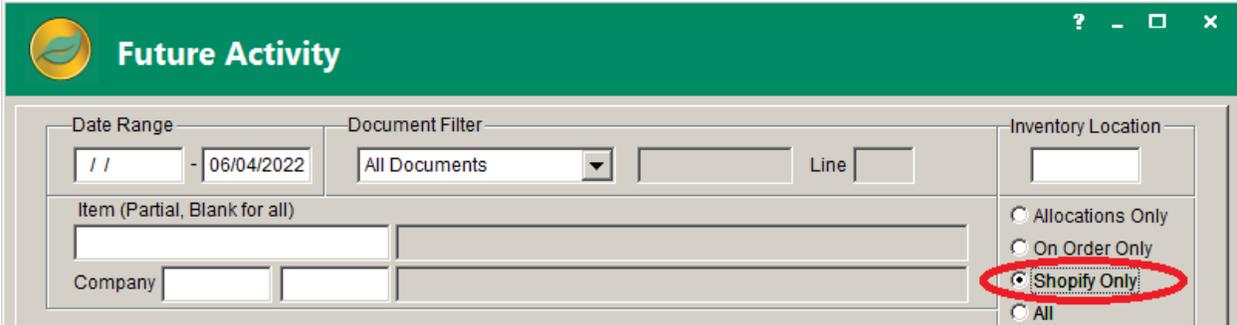
The Future Activity screen can now be used to display items from Shopify. (Inventory>Future Activity)

Print Communication Log - A new Print button was added to the InTouch Company Profile and Prospect Profile screens Contact Log tabs to print the Communication Log for that company and date range.
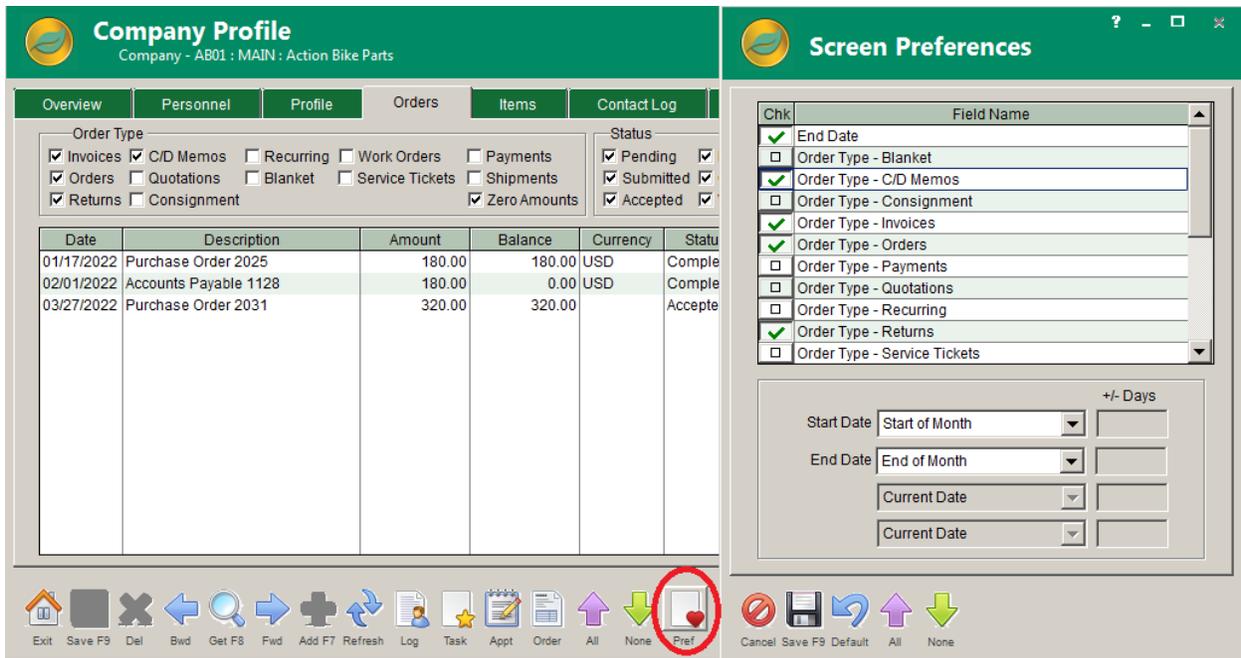
Preference Button - A new screen preferences interface was added to numerous screens throughout ALERE. A new "Pref" button appears on any screen where the various filters, dates, and options entered can be saved for that individual user.

Pressing this button brings up a new Screen Preferences screen with a grid containing all the fields that can have their values saved on that particular tab. Any checked entries will be saved when the Save button is pressed, and any other options will retain their defaults. Each date that appears in the grid is also listed below the grid.

Dates will not save the current values like other fields but will follow the rule setup in its corresponding entry below the grid, allowing for various choices such as the current date, the start of the month, the beginning of the year, etc. If the Date + x Days or Date – x Days options are selected, the additional +/- Days column will become active to enter the exact number of days to add or subtract from the current date. Any saved preferences will automatically be set when the user next invokes that screen.

Shopify New Features

Cloud Sync Program - The external Cloud Sync program (cldsync.exe) has been updated to support the automatic updating of Shopify stores.

The Shopify interface was expanded to support the upload of item descriptions and images from ALERE to Shopify. This uploading process can be automated and supports the synchronization of item descriptions, images, stock levels, and product pricing.

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Mass Picking Screen - A new Mass Picking screen for Work Orders was added to the Order module. (Production>Mass Process>Mass Picking)

Add Material - The Add Material to Order (AM) transaction is now available within DAQ.

Archive WO Material - Work Order material and configurations will now be archived on the Archive Orders screen and can be viewed on the View Orders screen.

Configuration Usage Report - A new Include Archived Orders option was added to the Configuration Usage report (Engineering>BOM Reports>Activity> Configuration Usage)

Exclude Finished Item - A new option to Exclude the Finished Item from the calculations was added to the Material Availability report (Engineering>BOM Reports>Control>Material Availability)

GL Manufacturing Journal Report - A General Ledger Manufacturing Journal report has been added to the Work Order module. (Production>Order Reports>Activity>GL Manufacturing Journal)

MRP Planning - The Item MRP Planning screen has a new option for Class. If the Item option is not entered, a Product Class can be entered to display all items that correspond to that class. (Logistics > Review Plan > Item MRP Planning)

GL Posting in WO - When linked to ALERE Accounting, a new GL Posting tab was added to the Work Order screen. (Production>Work Order>Standard)

Service & Mobility New Features

Automatic Sync Settings - A new Automatic Sync Settings screen has been added to the Mobility module. It shows the current automatic sync settings and status. It also allows the user to request an immediate sync. (Extensions>Mobility>Auto Sync)

Bar Codes – A new option to Show Bar Codes was added to the Service Ticket report. (Service>Process Reports>Service Ticket)

Delete Individual Units - Individual Units can now be deleted on Service Tickets if they do not have any transactions posted to the unit. (Service>Service Ticket)

Material Undo - A new Material Undo All Issues (MU) transaction type was added to the Service Ticket transactions. (Service>Service Ticket)

Multiple Material - A new Multiple Material (MM) transaction type was added to the Service Ticket transactions. A MM button on the Service Ticket screen Transaction tab invokes the new screen that allows posting multiple material issuances or material undo transactions. (Service>Service Ticket)

Service Dispatch Board - The Service Dispatch Board now has a horizontal scroll bar allowing all the service personnel to be seen on the board at once. (Service>Dispatch Board)

Service Ticket Accept Button - An Accept button was added to the Resources and Results tabs of the Service Ticket (Service>Service Ticket)

Manager & Miscellaneous New Features

Analytics – An Excel Export option was added to the Analytics screens (Customer, Supplier, Inventory, and Profit)

Archive Data - A new option to Remove Company Contact Logs before a defined date was added to the Archive Data screen Data Reduction tab. (Extensions>Archive Data)

Automatic Contact ID – When creating a new company or location, the system will automatically create a Contact ID based on the Company ID.

Company Template – The Company Template screen now allows the definition of a default country for the template. (Manager>Definition>Company Template)

Generate Labels - A new Active option was added to the Generate Labels screen. (Manager>Utilities>Generate Labels)

Import Companies - The Import button on the Company screen now supports importing additional locations to existing companies. (Manager>Company)

New User Right – added to determine if a user can change the Price/Discount on orders.

Passwords – The login password length for the ALERE product and DAQ was increased to 16 characters.

Reconcile Balances - A new Reconcile Balances function to reconcile the Inventory Tiers with the Inventory Quantities was added to the product. (Manager>Utilities>Reconcile Balances)

Refresh Checking Accounts Balance - A new Refresh button was added to the Checking Accounts screen to refresh the balance amount. (Manager>Banking Actions>Checking Accounts)

Tax Exempt Number and Date – There is now a tax-exempt number and expiration date on the customer Ship To tab of the company screen. This should determine if the order is tax-exempt or not when creating an order.

The browser Search function - now allows an *In List* option choice for both search criteria; such as searching for an order Status of A, S, or P.

Non-Transactional Data - The Add New Company screen has a new checkbox to copy just the Non-Transactional Data from the Import Companies when adding a new ALERE company. This will bring over all the static type data such as Customers, Suppliers, Inventory, GL Accounts, etc. but none of the transactional data such as Orders, Logs, etc. (File>Open Company)

New Reports and Report Options

1099 Amount and Forms - A new 1099 Amount field was added to the AP/Cash Payments screen to allow the editing of the 1099 amount for a check that has been posted. (Purchases>AP/Cash Payments) Also, electronic filing has been updated to allow combined federal/state filing for 1099 NEC.

Call Activity Report - A new Call Activity report was added to the system. This report displays and can be ordered by the Next or Last Call/Contact dates. (InTouch>Activity Reports>Call Activity)

DAQ Scripts Report - The DAQ Scripts report has a new option to Include Accounting Only, Manufacturing Only, or All scripts. (Manager>Control Reports>DAQ Scripts)

GL Journal Report - A new option to *Show Entire Journal Entries* was added to the General Ledger Journal report. This option will show the entire posting that contains the filtered conditions rather than just the specific lines of those postings. (Finance>Financial Reports>Journal)

Income Statement Report - The Income Statement report has a new Zero Balances option choice of Exclude Zero Net. (Finance>Reports>Financial>Income Statement)

Inventory Issues & Receipts Report - A new Company ID option was added to the Inventory Issues & Receipts report. (Inventory>Activity Reports>Issues & Receipts)

Open Orders Sales Report - A new Order By option choice for Product Class was added to the Open Orders (Sales) report. (Sales>Control Reports> Open Orders (Sales))

PO Receipts Report - A new Net Out Receipts by Date option was added to the Purchase Order Receipts report. This option will combine any reversed receipts with the receipts for that date. (Purchases>Activity Reports>Purchase Order Receipts)

Sales Analysis Report - A new version of the Sales Analysis report was added to the Analytics module that can include the archived data. (Extensions>Analytics>Reports>Sales Analysis)

Unrecognized Payables Report - A new option choice of Only was added to the Include Purchase Variance option on the Unrecognized Payables report. (Purchases>Control Reports>Unrecognized Payables)

Email New Features

Mass Email/Mail List - The Mass Email/Mail List Rules and Mass Email/Mail List screens now support additional options for Purchased Item(s) and/or Purchased Product Classes across a date range.

New Email rule – on Cash Receipts, specifically on usage of credit cards & cash payments.

Prepayment Email Rule – You can set an email rule to send an internal email when an SO prepayment is posted on an SO.

Service Ticket Email Rule - A new Email Automation rule was added to allow an email to be sent to the customer, an internal person, or the service technician when a Service Ticket is dispatched. Note that the subject and body text of a dispatch type email will support |12| for the dispatch date and |13| for the dispatch time in a 24-hour format. (Manager>Codes & Rules>Email Automation Rules).

UPS Tracking Number - on the Packing list and AR emails, now hyperlink to the UPS tracking site.

New Permissions

JMJM = Job Master

JMQU = Job Quotes

JMTC = Time Clock

JRCC = Cost to Complete Report

JRJB = Jobs Report

JRQU = Job Quotes Report

JRTA = Time Analysis Report

JRWP = Work in Process Report

KRCA = Call Activity Report

OFQI = Increase WO quantity with IP

SFCP = Change Price/Discount on Orders

WSAS = Automatic Sync Settings