



## ALERE® BUSINESS APPLICATIONS

InTouch is ALERE's integrated contact manager. Prospects, customers, suppliers and their respective contacts are seamlessly blended together where the critical information necessary to manage relationships is available.

Companies and prospects are maintained in separate files. This way marketing campaigns and other activities can be controlled. Recording notes, scheduling appointments or adding tasks are never more than one click away. Logs keep a record of all contacts with that company including every contact recorded from within ALERE, as well as any emails sent from within Outlook.



### Company Profile

InTouch stores companies with which your company has done business as company profiles. These profiles can record any number of the contacts at each company along with their pictures, contact details, and personal information to help humanize the individuals. A picture of the individual is attached to each logged phone call, email, meeting, etc.

Company Profile
? - □ ×

Company - CC01 : MAIN : Custom Colours, Inc.

Overview	Personnel	Profile	Orders	Items	Contact Log	Itinerary																												
Company Address			<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Co ID</th> <th>Locn ID</th> <th>Active</th> <th>Status</th> <th>Sales Rep</th> <th>Last Call</th> <th>Next Call</th> </tr> </thead> <tbody> <tr> <td>CC01</td> <td>MAIN</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td>SUP</td> <td>CHRIS</td> <td>02/08/2018</td> <td>/ /</td> </tr> <tr> <th>Agent ID</th> <th>Locn ID</th> <th colspan="3">Agent Name</th> <th colspan="2">Primary</th> </tr> <tr> <td> </td> <td> </td> <td colspan="3"> </td> <td colspan="2" style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> </tbody> </table>				Co ID	Locn ID	Active	Status	Sales Rep	Last Call	Next Call	CC01	MAIN	<input checked="" type="checkbox"/>	SUP	CHRIS	02/08/2018	/ /	Agent ID	Locn ID	Agent Name			Primary							<input checked="" type="checkbox"/>	
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					<input checked="" type="checkbox"/>																													
Primary Contact Information			Contact Log																															
Notes			Itinerary																															

Exit	Save F9	Del	Bwd	Loc Bwd	Get F8	Loc Fwd	Fwd	Add F7	Locate	Convert	Log	Task	Appt	Label

Unique company information that your company wishes to record can be configured by using thirty nine user-defined fields and four memo-style note fields.

Past order activity related to a company is easily available, with drill down to the actual order records, and it can be organized using a set of filters. Likewise, items that have been shipped or received from that company can be reviewed in the same manner.

The contact log has been made easy to search, including looking for key words in the body of the notes, so that related conversations can be grouped together.

### Company Contacts

A people centric file, rather than a company centric file, is kept in a company contacts file. This approach makes searching for an individual, and all the contact notes associated with them, much more straightforward.

The screenshot shows a software window titled "Company Contacts" with a green header bar. Below the header, the contact name "Alicia Harcher" and company "3PLUSA" are displayed. The interface is divided into several sections:

- Personnel:** A table with columns for Contact ID, Active, Contact Image, and Primary. The row for 3PLUSA shows it is active and primary.
- Contact Information:** A form with fields for Name (Alicia Harcher), Title (Customer Service), Sex (F), Phone (800-522-2244), and Email (etalicia@tiwcorp.com).
- Company Address:** A form with fields for Name (3+ Calling Cards), Street 1 (244 Chambers St), City (New York), State (NY), and Zip (10020).
- Contact Log:** A table with columns for Co ID, Locn ID, Married, Spouse, Children, Pets, Sports, and Misc06. The row for THPLUS shows she is married to Tim.
- Notes:** A large empty text area for recording communications.
- Image:** A photograph of Alicia Harcher, a woman in a black blazer, looking at papers.
- Toolbar:** A row of icons for Exit, Save F9, Del, Bwd, Get F8, Fwd, Add F7, and Log.

A contact profile includes a contact image and six user-defined miscellaneous fields. A synchronized record of all communications with that contact is provided and includes all the contacts recorded from within ALERE, as well as any emails sent from within Outlook.

### Prospects and Contacts

InTouch provides an environment that manages prospects in a parallel manner to that of companies and contacts. Prospect profiles and prospect contacts mimic company and company contacts profiles. The difference is that prospects do not have order activity.

However, enticing a prospect to do business with you may mean providing them with quotes. So InTouch provides a quote system similar to the standard sales order quote in ALERE.

**Prospect Quote**  
Prospect Quote - 1001 Accepted GQJ01

Prospect Quote: 1001 Accepted

Contact: Albert Quest  
Phone: 908-880-8874 Ext: 12

Bill To: GQJ01 MAIN  
Ship To: GQJ01 MAIN  
Refer To: [Empty]

Garbage Quest, Inc  
539 West Ave  
Sewaren NJ 07077

Tax Exempt  GST Exempt  Send Email  Auto Done

Date	Purchase Order	Ship Via	F.O.B.	Sales Rep	Misc01	Misc02	Misc03
01/21/2017		UPS	ORIGIN	CHRIS			

Terms ID	Due Date	Tax District	Taxes	Inv Locn	Rls Group	Cust Grp	Valid Until	Currency	Display Amt
NET15	02/05/2017	NJ	7.000	LOC1			07/21/2017	USD	Selected

Line	Type	Item	Quantity	Units	Taxable	Need By	Discount	Customer Price
1	Sale	MBFG01	1	EACH	Yes	01/21/2015	0.000	900.00000

SubTotal: 900.00  
Sales Tax: 63.00  
Total: 963.00

At the appropriate moment, prospect contact information can be converted to company contact information using a template to populate the information needed when creating a new company. You have the option of also converting “prospect quotes” to “standard sales quotes” or into live sales orders during the conversion process.

### Outlook Integration

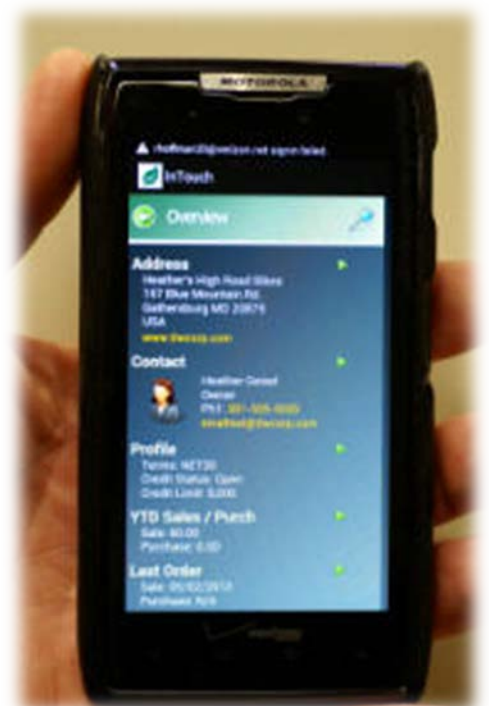
Since sharing information is central to the function of a good CRM package, InTouch has two-way links with Microsoft® Outlook to provide connectivity for appointments, tasks, and emails sent or recorded by either product.

As an extension, information natively placed by InTouch through the two-way link, can be utilized by the tools in Outlook.

### Apps

The ALERE Mobility Module publishes sales information to the Cloud where it is can be accessed using the *Call Sheet* app on a mobile device.

The *Call Sheet* app provides company and contact information, including order history and order status, to support the sales person before and during a sales call.





## Mass Email/Mail List Rules

Most companies will want to market to their prospects and existing customers using records of those companies compiled by InTouch. A set of user-defined filters can be manipulated to create a rule that lists companies that meet certain criteria. That rule can then be named and saved for use in email and direct mail campaigns.

Rule ID: PA Description: PA companies Rule Type: Companies and Prospects

Filter: State = PA

Contact	Email Address	State	Co ID	Company Name
Atty. Robert Coles	etrcoles@tiwcorp.com	PA	DA01	D'Fenz Team
Bobby Waters	etbwaters@tiwcorp.com	PA	PAC01	PA Clearwater
Cash Customer	emailtest@tiwcorp.com	PA	CASH	Cash Counter Sale
Chris	rhoffman@tiwcorp.com	PA	CHRIS	Chris
Chris James	etcjames@tiwcorp.com	PA	TIW	ALERE Inc, From TIW Techn
Chris Lester	clester@tiwcorp.com	PA	CHRIS	Chris
Diane	etdianne@tiwcorp.com	PA	MEG01	Megabank, N.A.
Frank Wendt	rhatcher@tiwcorp.com	PA	TIW	ALERE Inc, From TIW Techn
George Rutledge	etgrut@tiwcorp.com	PA	BWB01	Big Wheel Bikes
Hugh Jefferson	ethugh@tiwcorp.com	PA	GU01	General Utilities

Exit Save F9 Del Bwd Get F8 Fwd Add F7 Refresh

The list created by a rule can be manually edited to refine the set of records.

Any number of different rules can be created and saved. They are used by the next function.

## Mass Email/Mail List

Messaging and marketing campaigns is handled by InTouch through the use of the rules created by the previous function. Mass emailing can then be sent to multiple recipients based on these rules or by a previously saved email list.

The lists created by the rules can also be individually loaded, edited, and exported to Excel where they can be used for other purposes, such as direct mail or telemarketing.