

InTouch Module

The InTouch Module is the integrated contact manager for ALERE. Its purpose is to manage the information associated with company contacts (people) and prospects. InTouch has two-way links with Microsoft® Outlook that 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.

Used in conjunction with ALERE Mobility Apps, InTouch information can be shared with an expanding list of mobility devices through the cloud.

The *Company Profile* screen presents information from the perspective of the company. It has numerous tabs, each handling a specific function, which keep company information and customization easily organized and searched.

The *Overview* tab has a summary of a company's information, physical location and primary contact. The bottom portion of the tab is dedicated to a read-only version of the contact log. The five adjacent tabs are linked to the company displayed on the *Overview* tab.

The *Personnel* tab keeps information on the contacts within the company including a contact image and six user-defined miscellaneous fields.

A *Profile* tab is designed to allow completely customized information about a company via three columns each containing thirteen user-defined fields, as well as four memo-style note fields.

The *Orders* tab displays orders related to that company that can be organized by a set of filters.

The *Item* tab lists information on all the items that have been shipped or received from that company based on a set of filters.

The *Contact Log* tab keeps a record of all contacts with that company. This includes all the contacts recorded from within ALERE as well as any emails sent from within Outlook for that company.

The *Itinerary* tab provides a list of all the appointments and tasks defined within Outlook for the company.

The *Contacts* screen presents information from the perspective of the contacts. It has a tab for personnel and one for logging contacts.

The *Personnel* tab holds information on the contacts within a company including a contact image and six user-defined fields.

The *Contact Log* tab keeps a record of all communications with the contact displayed on the *Personnel* tab. This includes all the contacts recorded from within ALERE as well as any emails sent from within Outlook for that company.

InTouch provides an environment that manages prospects in a parallel manner to that of companies and contacts. Prospect profile and contact screen mimic company profile and contact screens. 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.

Controlling email is handled by InTouch through the use of a user-defined rules screen to create a list of people to receive emails. Mass emailing can then be sent to multiple recipients based on these rules or by a previously saved email list.

Separate screens within InTouch display contact calendar and tasks scheduled by Outlook.

Sales teams are supported and login access can be used to determine what information is available to teams or individual users.

