

Aline Ops, LLC Products and Services

SaaS Software Services:
Product / Service and Description
<p>Aline CRM: A senior living sales CRM for sales professionals with a singular view of prospect and resident data, multi-view, and fully customizable reporting dashboards, configurable workflows to create activities and advance prospects, discovery questions to standardize your sales process, integrated messaging capabilities with automated logging and speech-to-text functionality, competitive insights to help you stay on top of senior housing market data, a robust mobile app, and data integration with our Contact Center and the entire Aline product suite.</p>
<p>Aline Market Insights: Access to real-time sales and marketing industry benchmarks and comparison reports of portfolio communities to industry and portfolio benchmarks.</p>
<p>Aline Marketing Automation: Aline CRM and ActiveDEMAND provide an integrated marketing automation service for senior housing operators. These integrated workflows sync prospect and contact libraries to deliver digital content through automated marketing campaigns.</p>
<p>Aline Marketing Automation Contacts: The number of individual prospect and contact profile records that are stored in ActiveDEMAND for each individual customer.</p>
<p>Aline Chat: A virtual sales assistant that engages and qualifies visitors to your company website.</p>
<p>Aline Care: Provides digital care assessments, service plan / delivery, task scheduling, resident care history, incident reporting, standard & self-service reporting, iOS mobile care companion apps, document scanning and storage, and access to eMAR integrations API.</p>
<p>Aline Engage: Resident and family engagement application to communicate daily activities with respect to community activities, daily restaurant menus, resident service plan, bill pay, and resident discovery. App can be downloaded from the App Store and is available for both iOS and Android devices.</p>
<p>Aline Accounting: Financial and accounting software through partnership with Sage Intacct. Manage financials, payments and billing with a scalable solution with multi-entity reporting to manage the portfolio.</p>
<p>Aline Operational Insights: Business Intelligence platform with dashboards and analytics to support senior living business leaders, and sophisticated, data-driven alerts that help users proactively monitor their business and take timely action based on insight.</p>
<p>Aline Payments: Secure online payment processor with flexible payment options to handle many secure payments, with automated billing and invoicing.</p>
<p>Aline Quality: Provides a fully mobile paperless quality enhancement audit, site specific automated plans of correction for deficiencies, and functional site visit reports for operational efficiency, mobility, and collaboration.</p>
<p>Aline Leasing and Billing: Provides resident billing capabilities with centralized controls, apartment inventory & pricing, resident management dashboards, flexible leasing templates with state specific reporting, rate increase automation and resident notification workflows, census reporting, document scanning and storage, and access to general ledger integration API.</p>
<p>Aline Sales: Provides inquiry and professional referral database management, utilization of the communications center and standard/self-service reporting, access to lead integration API, and reservation management.</p>

Licensed Software Services:	
Product / Service and Description	
Aline eMAR (formerly ACCUflo):	Provides electronic medication administration software for use in tracking medication and care management.

Managed Services:	
Product / Service and Description	
Aline Contact Center LITE:	Aline's contact center receives inbound sales calls as either the primary or the backup operating seven days a week from 4:30 AM to 10:00 PM Mountain Standard Time. Includes automated call quality assurance, the capture of lead details (contact first and last name, prospect first and last name, contact phone number, email, and mailing address as required), and the transfer of non-sales calls directly to the community.
Aline Contact Center Standard:	Includes everything in the LITE package plus discovery (light discovery on care needs, time frame, hobbies / interests, needs match, and starting rates), the push of information into the client's CRM (contingent upon CRM capabilities or email lead and notes to the community distribution email), and the scheduling of appointments and tours.
Aline Contact Center PRO:	Includes everything in the Standard package plus outbound calls in direct response to web forms and referrals and online chat.
Aline Contact Center Call Tracking Number:	Ensures that the dialed call tracking number is the captured market source on new call-in inquiries.
Aline Contact Center Online Chat:	Aline's team directly manages all prospect engagement from the online chatbot on the community's website.

Integrations:	
Product / Service and Description	
Aline CRM Communications Integration:	Includes a Gmail/Outlook email and calendar integration, click-to-call, and texting capabilities.
Aline CRM Operations Integration:	Includes an integration between the Aline CRM and the customer's Billing / EMR (Electronic Medical Record), or EHR (Electronic Health Record) system. Includes the following Billing / EMR systems: Yardi, PointClickCare, Netsmart, Vitals, Eldermark, Icon, RealPage, ALIS, and MatrixCare.
Aline CRM Medical Referrals Integration:	Includes an integration between the Aline CRM and the customer's Hospital Referral Portal (HRP). The integration pulls the customer's referrals from the HRP and populates the data in the Aline CRM - automatically creating a prospect profile. Aline currently supports a certain number of HRP integrations. Please contact Aline for a confirmation of whether or not your HRP is available.
Aline CRM Incoming Leads Integration:	Includes an integration between the Aline CRM and the customer's digital sources for incoming leads. The integration allows incoming lead sources to push new leads to the CRM - automatically creating a prospect profile. Includes the following incoming lead sources: A Place For Mom, Caring.com, Further, SiteStaff, Seniorly, G5, and Roobrik.
Aline CRM Marketing Automation Integration:	Includes an integration between the Aline CRM and the customer's marketing automation system, excluding Aline Marketing Automation. Includes the following marketing automation systems: Hubspot, Active Campaign, and MailChimp.

Onboarding Professional Services:	
Product / Service and Description	
CRM	Aline Best Practices CRM Setup: One-time implementation support provides business process, database provisioning, software configuration, and account activation with Customer and its Authorized Users, conducted remotely via webinar. Software go-live, and post release support are provided remotely unless otherwise agreed in writing between the Parties.
CRM	Aline Enterprise CRM Setup: Includes all Best Practices CRM Setup services, plus one-time implementation support for custom workflows to support business processes.
CRM	Aline Expansion CRM Setup: One-time implementation support for existing CRM customers adding new databases to existing software configuration. Includes database provisioning and account activation with Customer and its Authorized Users, conducted remotely via webinar. Software go-live, and post release support are provided remotely unless otherwise agreed in writing between the Parties.
CRM	Aline Market Insights Setup: One-time setup and activation for Aline Market Insights.
CRM Integrations	Web Forms Setup: One-time implementation assistance with form embeds on website that integrate with the CRM (applicable if web developer does not execute web form setup).
CRM Integrations	Communications Integration Setup: One-time implementation assistance with setup and activation for Communications Integrations.
CRM Integrations	Operations Integration Setup: One-time implementation assistance with setup and activation for Operations Integrations.
CRM Integrations	Medical Referrals Integration Setup: One-time implementation assistance with setup and activation for Medical Referrals Integrations.
CRM Integrations	Incoming Leads Integration Setup: One-time implementation assistance with setup and activation for Incoming Leads Integrations.
CRM Integrations	Marketing Automation Integration Setup: One-time implementation assistance with setup and activation for Marketing Automation Integrations, excluding Aline Marketing Automation.
CRM Data Import	Non-CRM Data Upload Lite: One-time implementation support for single data file import from non-CRM data source. Data analysis and validation with Customer and its Authorized Users, conducted remotely via webinar. Data source is supported in csv or xls formats.
CRM Data Import	Non-CRM Data Upload Standard: One-time implementation support for multiple data file import from non-CRM data source. Data analysis and validation with Customer and its Authorized Users, conducted remotely via webinar. Data source is supported in csv or xls formats.
CRM Data Import	Non-CRM Data Upload Pro: Includes all Non-CRM Data Upload Standard services, plus one-time implementation support for field mapping of one file column to many CRM fields.
CRM Data Import	CRM Data Migration: One-time implementation support for CRM export data analysis, conversion, migration, and validation with Customer and its Authorized Users, conducted remotely via webinar. Data source is exported from another CRM system and supported in csv, xls or sql formats.

CRM Data Import	Internal Transfer: Data transfer between Aline-owned CRM systems
Marketing Automation	Aline Marketing Automation Setup: One-time implementation support for the Aline Marketing Automation platform. Includes platform setup, account/sub account setup, setup of the integration with the Aline CRM, database configuration for each location, mapping of the following: fields, users, campaigns, activities and additional activity result coding.
Marketing Automation	Marketing Automation Web Forms Setup: One-time implementation assistance with form embeds on website from Aline Marketing Automation platform.
Marketing Automation	SSL Certification Setup: One-time implementation support for a SSL Certificate from Aline Marketing Automation platform.
Marketing Automation	Call Tracking Number Setup: One-time implementation support for a Call Tracking Number from Aline Marketing Automation platform.
Chat	Aline Chat Setup: One-time implementation support for the Aline Chat platform, including account/sub account setup, branding, and setup of the integration with the Aline CRM.
Contact Center	Aline Contact Center Setup: One-time implementation includes KMS development, partnership training, client admin training, call routing setup, workflow setup, branded caller ID setup, and call tracking platform alignment. Customers not using the Enquire CRM or MAP products must provide access to their CRM and/or MAP products to make appropriate call routing adjustments. Customer is solely responsible for any authorizations needed to provide Aline with this access, regardless of the nature or source thereof.
Resident Management	Aline Care Setup: One-time implementation support provides business process, database provisioning, software configuration, and account activation with Customer and its Authorized Users, conducted remotely via webinar. Software go-live, and post release support are provided remotely unless otherwise agreed in writing between the Parties.
Resident Management	Aline Engage Setup: One-time implementation support provides business process, database provisioning, software configuration, and account activation with Customer and its Authorized Users, conducted remotely via webinar. Software go-live, and post release support are provided remotely unless otherwise agreed in writing between the Parties.
Resident Management	Aline eMAR (formerly ACCUflo) Setup: One-time implementation support includes project management, hardware setup/configuration, initial facility introductory training (admin. Webinar), and order review/verification.
Operations Management	Aline Accounting Setup: One-time implementation support provides business process, database provisioning, software configuration, and account activation with Customer and its Authorized Users, conducted remotely via webinar. Software go-live, and post release support are provided remotely unless otherwise agreed in writing between the Parties.
Operations Management	Aline Operational Insights Setup: One-time implementation support provides business process, database provisioning, software configuration, and account activation with Customer and its Authorized Users, conducted remotely via webinar. Software go-live, and post release support are provided remotely unless otherwise agreed in writing between the Parties.

Operations Management	Aline Payments Setup: One-time implementation support provides business process, database provisioning, software configuration, and account activation with Customer and its Authorized Users, conducted remotely via webinar. Software go-live, and post release support are provided remotely unless otherwise agreed in writing between the Parties.
Operations Management	Aline Quality Setup: One-time implementation support provides business process, database provisioning, software configuration, and account activation with Customer and its Authorized Users, conducted remotely via webinar. Software go-live, and post release support are provided remotely unless otherwise agreed in writing between the Parties.
Operations Management	Aline Leasing and Billing Setup: One-time implementation support provides business process, database provisioning, software configuration, and account activation with Customer and its Authorized Users, conducted remotely via webinar. Software go-live, and post release support are provided remotely unless otherwise agreed in writing between the Parties.
Full Suite	Aline Full Suite Setup: One-time implementation support provides business process, software configuration, data mapping and validation discussions with Customer and its Authorized Users, conducted remotely via webinar. Software go-live, and post release support are provided remotely unless otherwise agreed in writing and duly executed by the Parties. Unless otherwise agreed in writing and duly executed by the Parties, Customer is responsible for the data configurations and other administrative functions within the Software that establish or affect master data, calculations, operating rules/exceptions, system parameters and default settings. To the extent set forth in an Order Form, Aline will support Customer in the initial Software configuration and provide advice when configuration changes are made. Unless otherwise agreed in writing and duly executed by the Parties, Aline is not responsible for the decision as to how the configuration is set. Aline is responsible for the configuration of the Aline infrastructure and any configuration of such infrastructure that establishes Customer’s access to the Platform. This includes establishing the Customer name, Modules to be used, and any connections required to make the Platform and initial data configuration properly operate. Reports provided as part of the Platform are available to all users current under a standard subscription. Applies to the setup services for the combination of Aline products including Aline Care, Aline Engage, Aline Accounting, Aline Operational Insights, Aline Payments, Aline Quality, Aline Leasing and Billing, and Aline eMAR.
CRM	Aline Sales Setup – w/ Data: One-time implementation support provides business process, software configuration, data mapping and validation discussions with Customer and its Authorized Users, conducted remotely via webinar. Software go-live and post release support are provided remotely unless otherwise agreed in writing and duly executed by the Parties.
CRM	Aline Sales Setup – w/o Data: One-time implementation support provides business process and software configuration discussions with Customer and its Authorized Users, conducted remotely via webinar. Software go-live and post release support are provided remotely unless otherwise agreed in writing and duly executed by the Parties.

Training Services:	
Product / Service and Description	
CRM	Aline CRM Webinar Training: Training is available for Customer and its Authorized Users to learn about and use the tools and core business processes supported by Aline CRM, in accordance with their day-to-day tasks and operations. Training is provided via remote live training sessions.
CRM	Aline CRM On-Site Training: Training is available for Customer and its Authorized Users to learn about and use the tools and core business processes supported by Aline CRM, in accordance with their day-to-day tasks and operations. Training is provided via in-person training sessions.
Marketing Automation	Aline Marketing Automation Training: This training is available for Customer and its Authorized Users to use the marketing automation platform and learn best practices for day-to-day tasks and operations. Training is provided via remote live training sessions.
Contact Center	Aline Contact Center Training: This training is available for Customer and its Authorized Users to use Contact Center services and learn best practices for day-to-day tasks and operations.
Resident Management	Aline Care Training: Training is available for Customer and its Authorized Users to learn about and use the tools and core business processes supported by Aline Care, in accordance with their day-to-day tasks and operations. Training is provided via remote live training sessions.
Resident Management	Aline Engage Training: Training is available for Customer and its Authorized Users to learn about and use the tools and core business processes supported by Aline Engage, in accordance with their day-to-day tasks and operations. Training is provided via remote live training sessions.
Resident Management	<p>Aline eMAR (formerly ACCUflo) Webinar Training: Includes one trainer for a webinar training and staff shadowing during the initial “go-live”.</p> <p>3.5 hours, new user training</p> <ul style="list-style-type: none"> • 1 hour remote Order Approval Training (nursing staff) • 2 hours remote Go Live Training (community end users) • 30 min remote Administrator Training (nursing staff, post Go Live)
Resident Management	<p>Aline eMAR (formerly ACCUflo) and Care On-Site Training: Includes one trainer for two (2) days of on-site training during the initial “go-live”.</p> <p>6.5 hours, new user training</p> <ul style="list-style-type: none"> • 1 hour remote Order Approval Training (nursing staff) • 2 hours remote Go Live Training (community end users) • 30 min remote Administrator Training (nursing staff, post Go Live) • 1.5 hours on-site Go Live Training Session A (community end users) • 1.5 hours on-site Go Live Training Session B (community end users) <p>16 hours, on-site go-live support</p>

Operations Management	Aline Operational Insights Training: Training is available for Customer and its Authorized Users to learn about and use the tools and core business processes supported by Aline Operational Insights, in accordance with their day-to-day tasks and operations. Training is provided via remote live training sessions.
Operations Management	Aline Payments Training: Training is available for Customer and its Authorized Users to learn about and use the tools and core business processes supported by Aline Payments, in accordance with their day-to-day tasks and operations. Training is provided via remote live training sessions.
Operations Management	Aline Quality Training: Training is available for Customer and its Authorized Users to learn about and use the tools and core business processes supported by Aline Quality, in accordance with their day-to-day tasks and operations. Training is provided via remote live training sessions.
Operations Management	Aline Leasing and Billing Training: Training is available for Customer and its Authorized Users to learn about and use the tools and core business processes supported by Aline Leasing and Billing, in accordance with their day-to-day tasks and operations. Training is provided via remote live training sessions.
Full Suite	Aline Full Suite Training: Training is available for Customer and its Authorized Users to learn about and use the tools and core business processes supported by Aline Full Suite, in accordance with their day-to-day tasks and operations. Training is provided via remote live training session and applies to the combination of Aline products including Aline Care, Aline Engage, Aline Accounting, Aline Operational Insights, Aline Payments, Aline Quality, Aline Leasing and Billing, and Aline eMAR. On-site training for eMAR and Care can be requested through the Aline eMAR (formerly ACCUflo) and Care On-Site Training Package

Data Services:
Product / Service and Description
Professional Services – CRM Data: Project-based data services to bulk update and/or append fields in your CRM database (e.g., profile status, contact information, user assignment, scheduled activities, automated workflows, etc.).

Hardware:
Product / Service and Description
eMAR (formerly ACCUflo) Computer: Latitude E5590 (or equivalent) touchscreen design laptop without a rugged chassis.
eMAR (formerly ACCUflo) Scanner (Option 1): Voyager 1450G – 2D (or equivalent). Includes a mounting holster.
eMAR (formerly ACCUflo) Scanner (Option 2): Voyager 1250G – 1D Linear (or equivalent). Includes a mounting holster.
eMAR (formerly ACCUflo) Cart Assembly Kit: Includes Ergotron Neo-Flex arm, mounting tray, and cable management kit.

One on One Sherpa, LLC Products and Services

SaaS Software Services:	
Product / Service and Description	
Aline CRM – PCS License – Database:	Provides prospect, influencer, and professional referral contact database management, utilization of the occupancy board for tracking census, standard/self-service reporting, sales coaching library, API integration library, and support portal.
Aline CRM – PCS License – SNF Database:	Provides patient, representative, and professional referral contact database management, utilization of the occupancy board for tracking census, standard/selfservice reporting, sales coaching library, API integration library, and support portal.
Aline CRM – PCS Chat:	Sherpa Chat is a virtual sales assistant that engages and qualifies visitors to your company website with Prospect-Centered Marketing™ workflows.
Aline CRM – PCS Data Pipeline:	Provides a direct connection to Customer’s Sherpa CRM data warehouse for use with your independent license of a third-party business intelligence tool.
Aline Marketing Automation – PCS:	Sherpa CRM and ActiveDEMAND provide an integrated marketing automation service for senior housing operators. These integrated workflows sync prospect and contact libraries to deliver digital content through automated marketing campaigns.
Aline Marketing Automation – PCS Contacts:	The number of individual prospect and contact profile records that are stored in ActiveDEMAND for each individual customer.

Training Subscription Services:	
Product / Service and Description	
Aline Ascend Learning Package:	Bundled subscription package including e-learning and virtual classroom. Requires a 12-month subscription term.
Aline E-Learning:	Sherpa e-learning is designed to help Customer standardize sales techniques and processes across Customer’s entire organization. Each course includes videos, written content, and demonstrations – along with quizzes to test knowledge. Completed lessons and quiz results appear on Customer’s learning management dashboard.
Aline Virtual Classroom:	Virtual Classroom is a week of live, interactive coaching led by senior living sales experts, including PCS Fundamental and PCS Leadership.

Implementation Services:	
Product / Service and Description	
CRM – PCS	Aline CRM – PCS Setup: One-time implementation support provides business process and software configuration discussions with Customer and its Authorized Users, conducted remotely via webinar. Software go-live and post release support are provided remotely unless otherwise agreed in writing and duly executed by the Parties.
CRM – PCS	Aline Expansion CRM - PCS Setup: One-time implementation support for existing CRM customers adding new databases to existing software configuration. Includes database provisioning and account activation with Customer and its Authorized Users, conducted remotely via webinar. Software go-live, and post release support are provided remotely unless otherwise agreed in writing between the Parties.

CRM – PCS Data Import	Non-CRM Data Upload Lite: One-time implementation support for single data file import from non-CRM data source. Data analysis and validation with Customer and its Authorized Users, conducted remotely via webinar. Data source is supported in csv or xls formats.
CRM – PCS Data Import	Non-CRM Data Upload Standard: One-time implementation support for multiple data file import from non-CRM data source. Data analysis and validation with Customer and its Authorized Users, conducted remotely via webinar. Data source is supported in csv or xls formats.
CRM – PCS Data Import	Non-CRM Data Upload Pro: Includes all Non-CRM Data Upload Standard services, plus one-time implementation support for field mapping of one file column to many CRM fields.
CRM – PCS Data Import	CRM Data Migration: One-time implementation support for CRM export data analysis, conversion, migration, and validation with Customer and its Authorized Users, conducted remotely via webinar. Data source is exported from another CRM system and supported in csv, xls or sql formats.
CRM – PCS Data Import	Internal Transfer: Data transfer between Aline-owned CRM systems
Marketing Automation – PCS	Aline Marketing Automation – PCS Setup: One-time implementation support for the ActiveDEMAND MAP product to map contact fields with the CRM and integrate social accounts, setup brand assets, and provide training for standard utility workflows and processes.
Marketing Automation – PCS	Aline Marketing Automation – PCS Web Forms Setup: Aline assistance with form embeds on website that integrate with the CRM (applicable if web developer does not execute web form setup).
Chat – PCS	Aline CRM – PCS Chat Setup: One-time implementation support for the Aline CRM – PCS Chat platform, including account/sub account setup, branding, and setup of the integration with the Aline CRM – PCS.

Data Services:	
Product / Service and Description	
Professional Services – Aline CRM – PCS Data: Project-based data services to bulk update and/or append fields in your CRM database (e.g., profile status, contact information, user assignment, scheduled activities, automated workflows, etc.).	

Training Services:	
Product / Service and Description	
CRM – PCS	Aline CRM – PCS Webinar Training: Training is available for Customer and its Authorized Users to learn about and use the tools and core business processes supported by Aline CRM, in accordance with their day-to-day tasks and operations. Training is provided via remote live training sessions.
CRM – PCS	Aline CRM – PCS On-Site Training: Training is available for Customer and its Authorized Users to learn about and use the tools and core business processes supported by Aline CRM, in accordance with their day-to-day tasks and operations. Training is provided via in-person training sessions.
Marketing Automation – PCS	Aline Marketing Automation – PCS Training: This training is available for Customer and its Authorized Users to use the marketing automation platform

	and learn best practices for day-to-day tasks and operations. Training is provided via remote live training sessions.
PCS Premium Training	Aline Event Workshop – In-person: A private, hands-on workshop focused on the fundamentals of Prospect-Centered Selling®. The workshop includes discussion on how to analyze the sales process, as well as current performance, goals, and barriers to success. While the workshop is designed for everyone, from direct sales teams to executive leadership, the content and approach can be tailored to the intended audience at the request of company leadership.
PCS Premium Training	Aline Event Sponsorship/Attendance – In-person: Requested sponsorship and/or Customer Success Manager (“CSM”) attendance for Customer’s events (e.g., sales summit, executive retreat, regional collaborative, etc.). This can be combined with an Event Workshop.
PCS Premium Training	Aline Leadership Lab – In-person: A one-day, eight-hour session with Sherpa experts to engage in case study analysis of Customer’s Sherpa dashboards and reports, and potentially identifying opportunities for improvement and communication between sales and operations at all levels of the organization.
PCS Premium Training	Aline Culture Starter Seminar – In-person: This twelve-hour interactive seminar on Prospect-Centered Selling® is spread over two days and led by senior living sales experts, which discusses valuable tools and strategies to build relationships with prospects and improve sales results.
PCS Premium Training	Aline Leadership Coaching Series – Virtual: Sales Enablement Coaching is a 6-month program of biweekly (every other week) sessions, guiding community-level leadership through the recommended best practices for applying and sustaining Prospect-Centered Selling® in Customer’s daily routine, including a monthly leadership review to measure and analyze results in Sherpa. This series is designed for smaller senior living companies, where regional sales support is not available.
PCS Premium Training	Aline Leadership Webinar Series – Virtual: Sales Enablement Leadership Training is a 6-month program of bi-weekly (every other week) sessions, this program analyzes an organization’s historical performance to create an improvement plan, co-authored by executive sales leadership. Leadership is able to co-facilitate the training content to potentially boost adoption and results. This series is designed for larger organizations with established regional sales support.
PCS Premium Training	PCS® Fundamentals Virtual Classroom – In-person: A week of live, interactive coaching led by senior living sales experts. Our instructors have decades of experience using Prospect-Centered Selling® in their own sales teams as well as mentoring others in both the methodology and metrics.
PCS Premium Training	PCS® Leadership Virtual Classroom – Virtual: A week of live, virtual coaching led by senior living sales experts. Our instructors have decades of experience using Prospect-Centered Selling® in their own sales teams as well as mentoring others in both the methodology and metrics.
PCS Premium Training	Aline Travel Reimbursement: Employee travel expenses associated with the delivery of contracted in-person training services