



## Insurance Certificate Tracking and Document Management Software Fastrack© - Windows Version Frequently Asked Questions

### **Can I run Fastrack on a WAN?**

Fastrack is optimized to run on a stand-alone Windows station or a Local Network. Remote access can be accomplished through remote software like Symantec's pcAnywhere, Citrix System's "Citrix Server" or Microsoft's "Remote Desktop Connection" or many other similar software packages. Currently Fastrack's data is stored with the application and cannot be relocated. The enterprise version of Fastrack (iFastrack) is now available. This will allow the software to be run from anywhere via the Web.

### **Can I run Fastrack on the Web?**

Yes, iFastrack, our web version, is now available. The Web version uses .NET technology, SQL Server databases, MS Word letter templates and Crystal reports.

### **Can I run Fastrack under Microsoft Windows 7?**

Yes, Fastrack will run under Microsoft's Windows 98 through Windows 7 operating systems.

### **How many users can access Fastrack?**

With a network license, you can have an unlimited number of users accessing Fastrack. Just put a shortcut on their desktop pointing to the Fastrack.exe in the Fastrack directory on your server.

### **Can I restrict users to view but not change data?**

Yes, you can turn on password access in the Program Setup screen and then create a Password in the Passwords screen for View Only status.

### **Can I change the format of my insurance follow-up letter?**

Yes, you can change the letter template. Go to Maintenance / Change a Template and select Change Single Letter. Each tab represents different sections of the letter where you can customize verbiage and change fonts. You can also import your own header graphic.

### **Can I email follow-up letters?**

Yes, you can both email and print follow-up letters. You must first setup your email configuration in Maintenance and then enter 'E' in the field next to the email address in the insurance screen under Transactions. The next time you Generate Letters, those vendors with email selected ('E'), will be listed under email and all others under print.

### **How do I know how many certificate modules to purchase?**

The initial Fastrack Single User license comes with the first 500 vendor records for tracking insurance certificates and documents. The Network license comes with the first 1,000. Each module comes with 250 additional vendor records. If you track 1,000 certificates, you will need to purchase three additional modules with a Single User license, but no additional modules with the Network license.

### **What is a Required Limit Category?**

This is a unique setting of policy and additional terms requirements you create in the Maintenance section. When you enter in a vendor certificate, you select the insurance category the certificate must meet from a drop down box on the screen. This box contains all the categories you built in Maintenance.

Each Category allows you to select policy and limit requirements for General Liability, Automobile, Excess, Workers Compensation and two customizable policies. You can also select Additional Insured, 30 days notice, Waiver of Subrogation and five customizable terms as required for a certificate. Fastrack allows you to enter an unlimited number of unique Required Limit Categories.

### **How do I know what my certificate requirements are?**

You can get this information from your Risk Manager, legal department, insurance broker or vendor contracts.