GG-One Software

iFastrack v8.10 Tutorial

Data Maintenance

GG-ONE SOFTWARE

POWERING BUSINESS TRACKING SYSTEMS

This tutorial provides an overview of the iFastrack Data Maintenance Section including adding Insurance Requirement Categories, cc Names, Groups, Services and Brokers.

Maintenance Selections

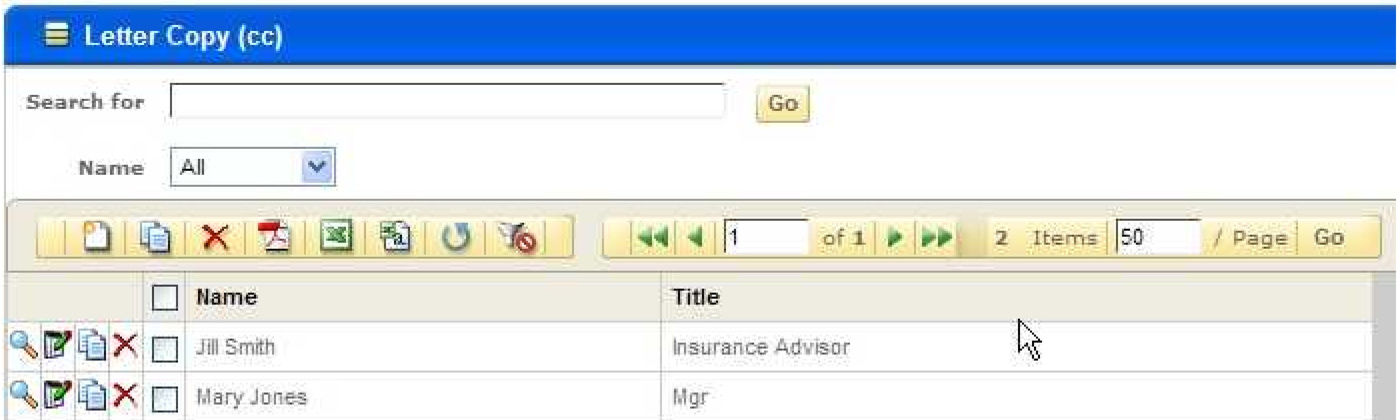
The Maintenance Menu provides access to three maintenance activities:

- Data Maintenance – Build cc Lists, Insurance Rqmt Categories and fields, Groups, Services
- System Maintenance – Enter Program Defaults, Companies, Users and Access Rights
- System Utilities – View Audit Log, Import/Export Data

Build Program Tables

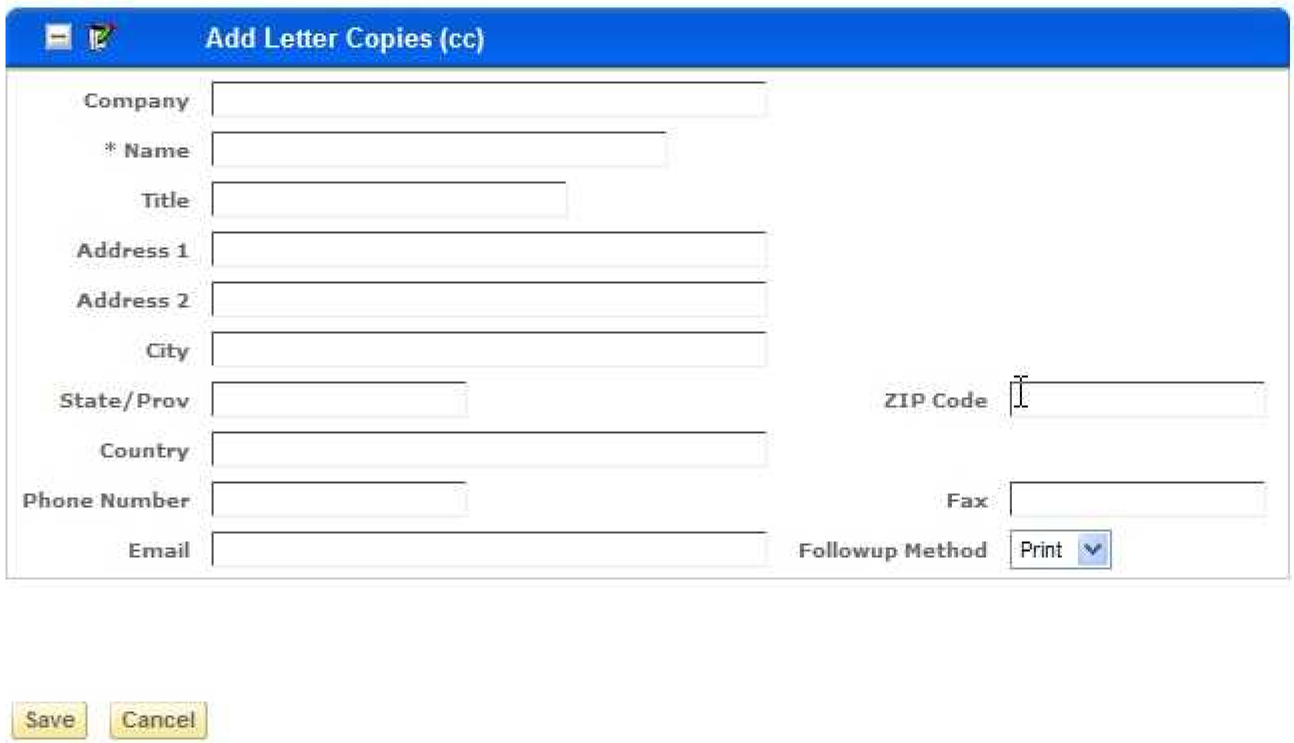
Data Maintenance provides options to build your letter copy CC list, Insurance Requirement Categories including the Policy names, Limit field names and Additional Terms, Standard Notes for Letters, Groups, Services, Brokers and Facilities. Data tables created in this section will be used by the system to build drop down lists for selection by other screens.

Letter Copy (cc) – Main Screen



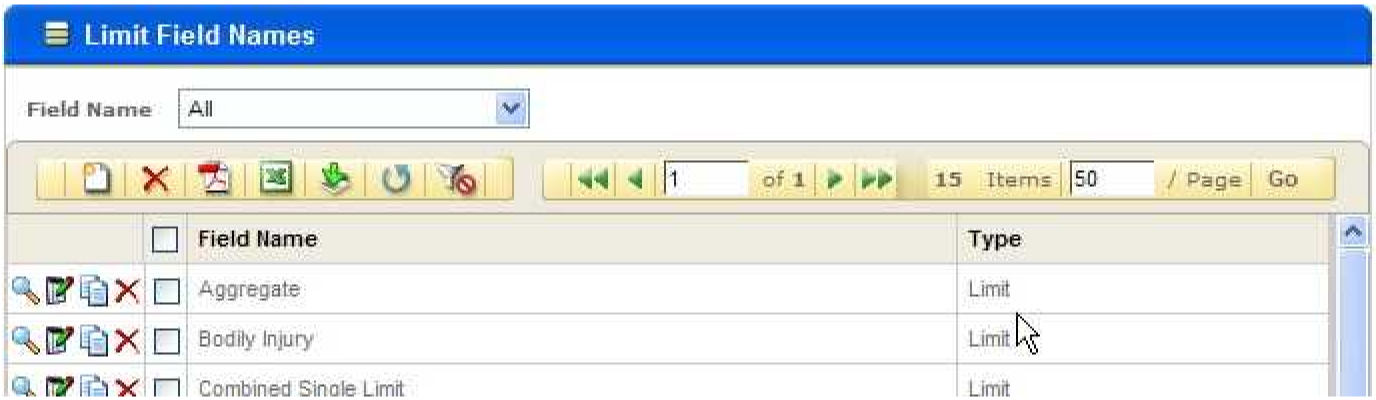
Enter names to be included as cc copies on the bottom of the insurance follow-up letters. Each letter can have three cc names listed. The cc names are selected from a drop down box on the insurance certificate screen. Copies of letters are automatically created for each cc name and either printed or emailed.

Letter Copy (cc) – Add/Edit Screen



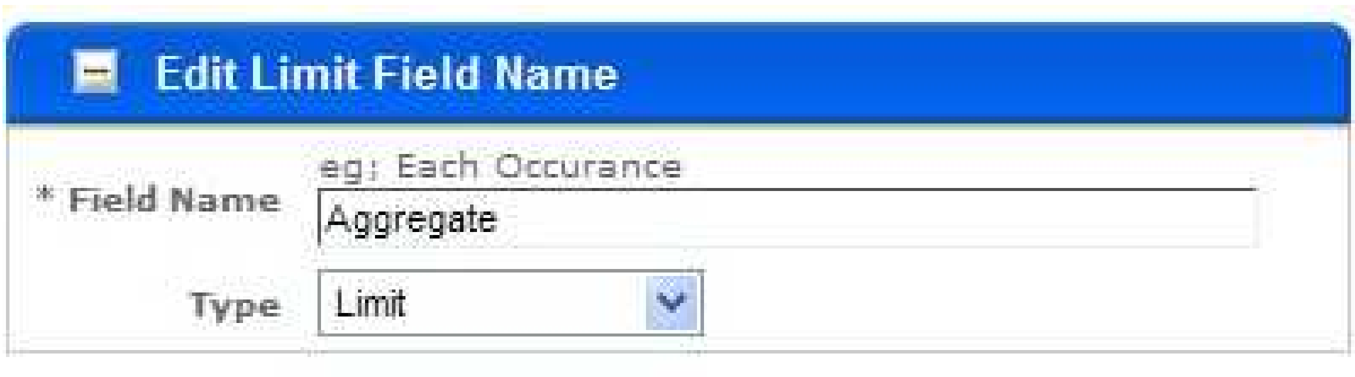
Enter the cc persons contact information. Follow-up method Email requires a valid email address. If printing, an envelope/label is also printed with the letter copy.

Limit Field Names – Main Screen



This Limit Field Names screen displays the list of Limit Fields used in building Insurance Requirement Categories. These fields are used in the Policy screen to assign up to three limits to track for a particular Policy. You can add, edit, delete or show the Limit Field. If the Type is Limit, the software verifies that the actual limit amount is equal to or greater than the required limit amount. If Type is Deductible, the software verifies that the actual limit amount is less than or equal to the required limit amount.

Limit Field Names – Add/Edit Screen



Enter the Limit Field Name and select whether the Limit Type is Limit or Deductible.

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Policies – Main Screen

The Policies screen displays the list of Policy names created for use in building Insurance Requirement Categories. Next to each Policy Name are the three Limit fields associated with the Policy. You can Add, Edit, Copy, Delete and Show a Policy.

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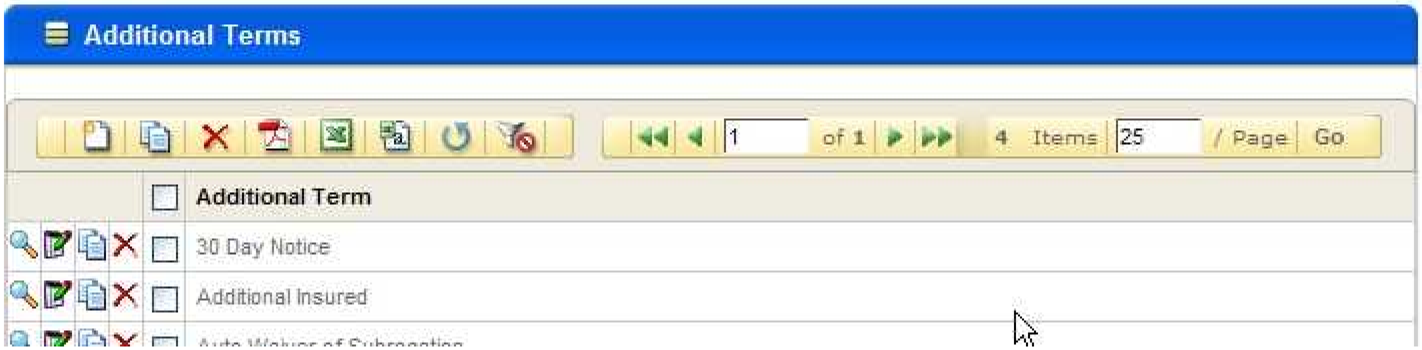
Policies – Add/Edit Screen

The Policy Add/Edit Screen allows you to enter a custom Policy Name and select up to three Limit fields to be tracked for the Policy.

Additional Terms – Main Screen



The Additional Terms Screen displays the list of Additional Terms created for use in building Insurance Requirement Categories. You can Add, Edit, Copy, Delete and Show an Additional Term. Additional terms are limited to 250 characters.

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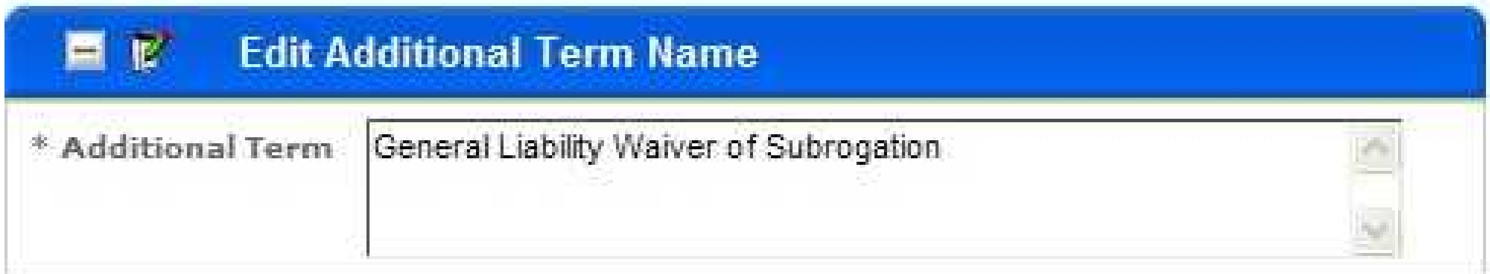
Additional Terms – Add/Edit Screen



Key in the Additional Term. Terms are selected as part of Insurance Requirement Category and are displayed and printed in their entirety on screens and in non-compliance follow-up letters. There is no limit to the length of an Additional Term.

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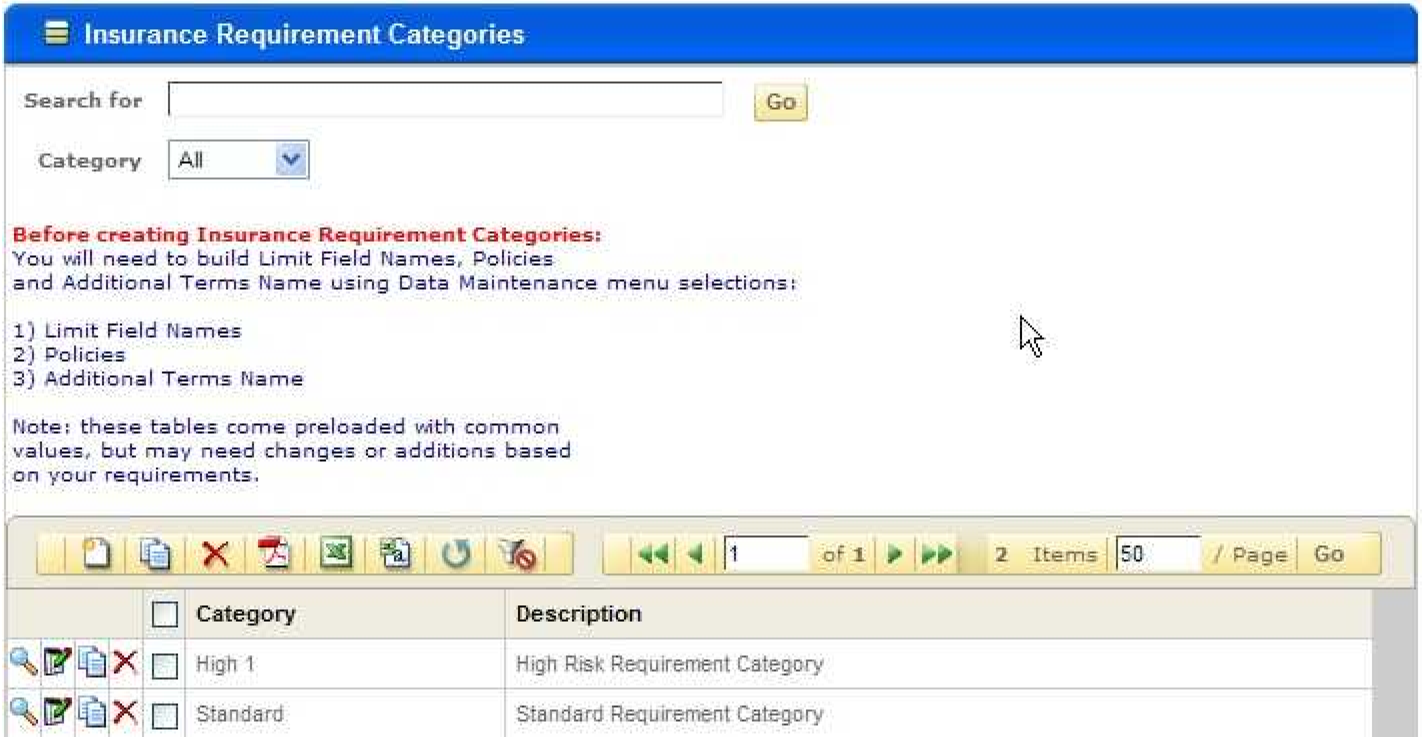
Insurance Rqmt Categories – Main Screen



The Insurance Requirement Categories screen displays the list of Insurance Requirement Categories created for verifying that Vendor Insurance Certificates are compliant. You can Add, Edit, Delete and Show a Category. Categories are constructed in three parts: Category Name and Description; Policies/limit amounts required; and Additional Terms required.

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Insurance Rqmt Categories – Add/Edit Screen
Part 1 – Name and Description

Enter an Insurance Rqmt Category Name and Description. The Category Name will appear in a drop down box in the Vendor Insurance Screen. The selected Category is used to determine Vendor Insurance compliance. Create easily recognizable names related to their associated policy and term requirements. For a new Category, select Save - the Edit Category screen will then appear to select the required Policies, Limits and Additional Terms.

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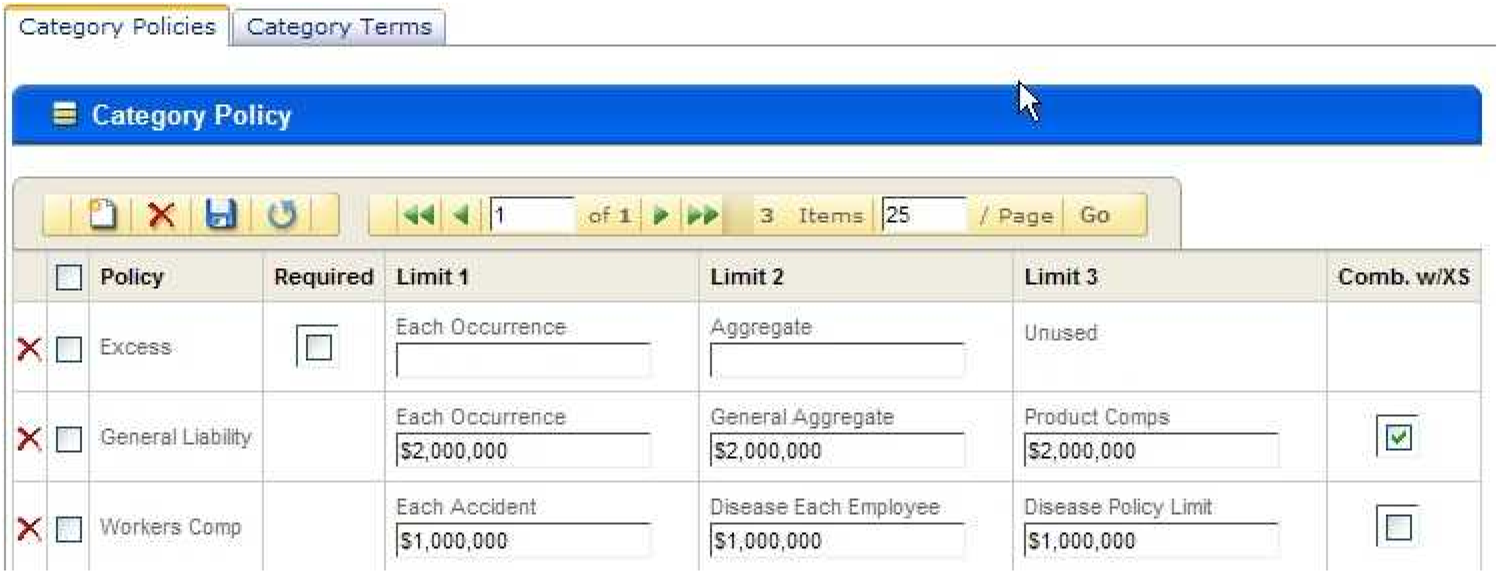
Insurance Rqmt Categories – Add/Edit Screen
Part 2 – Policies



Policies required for the selected Insurance Rqmt Category are listed. You can add new policies or delete policies on the list. Enter the policy limit requirements into the Limit fields. To combine the policy limits with Excess coverage limits to meet policy limit requirements, click the Comb. w/XS box. See next slide for the Policy Add screen.

Note: if you do not require Excess coverage, do not add Excess as a policy to the Insurance Requirement Category. The software will automatically add Excess as ‘not required’ if Combine w/XS is checked for any of the other policies required. You can then easily check Excess as received for the vender insurance entry. You cannot change the policy name ‘Excess’ to another name as the software triggers off that specific spelling.

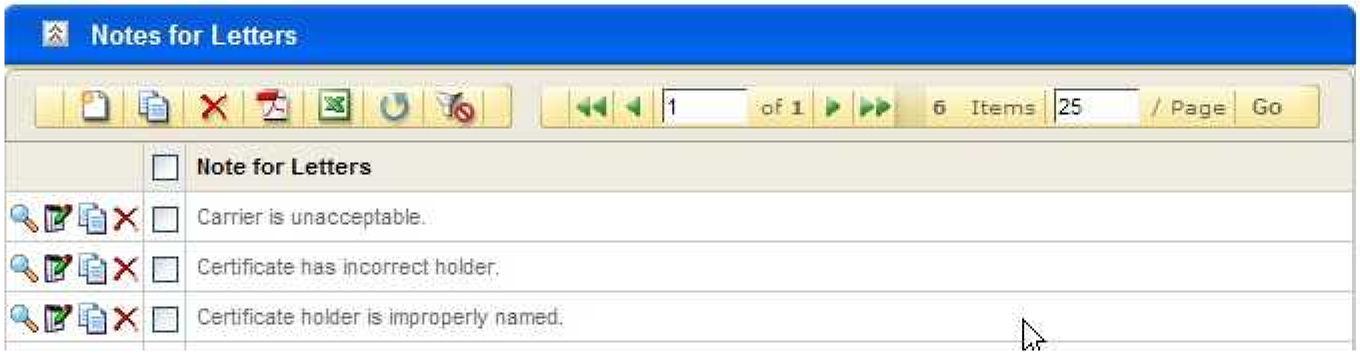
Insurance Rqmt Categories – Add/Edit Screen
Part 2a – Add Policy

Policies available for selection are listed in the drop down box. Select the Policy you want to add to the Insurance Requirement Category.

Insurance Rqmt Categories – Add/Edit Screen
Part 3 – Additional Terms

Additional Terms required for the selected Insurance Rqmt Category are listed. You can add new terms or delete terms on the list.

Notes For Letters – Main Screen



The Notes For Letters screen displays the list of standard notes created for use in vendor Insurance Certificate tracking. You can set a vendor certificate as non-compliant by assigning one or more Notes For Letters. Certificates with Notes For Letters will appear in the Letters list and the Note will be printed on the letter to the vendor. This feature allows you to set your own custom non-compliance issues outside of the one's automatically tracked by the software.

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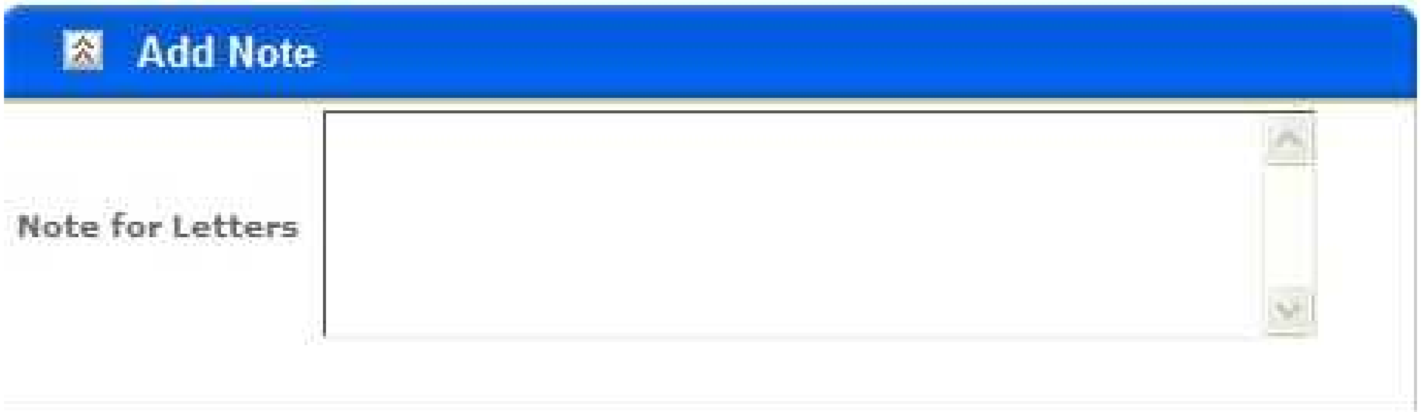
Notes For Letters – Add/Edit Screen



Enter a detailed Note. The note will be saved in the Notes For Letters list and will appear in the Notes For Letters drop down list in the Vendor Insurance Certificate screen for selection.

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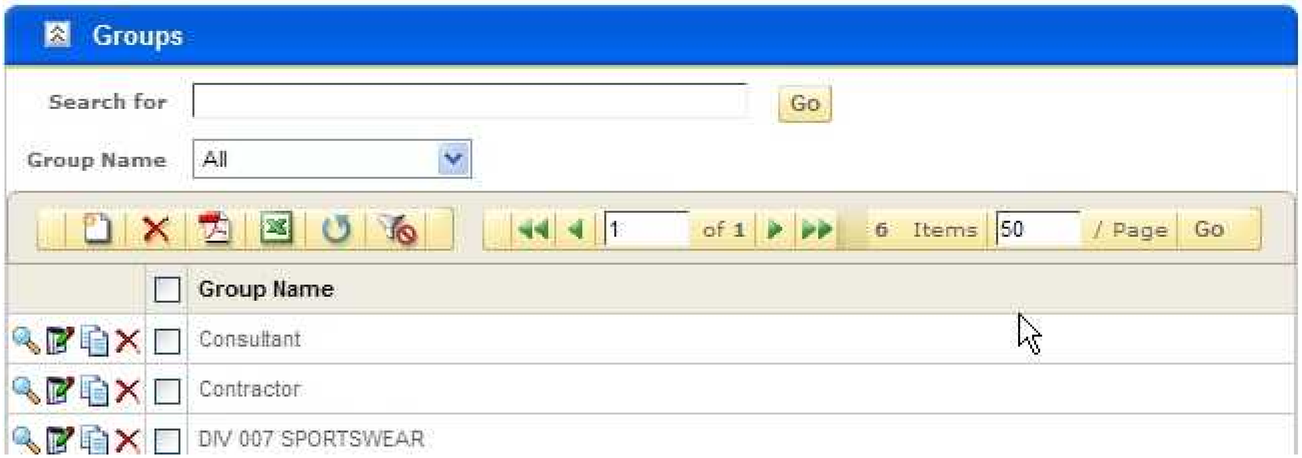
Group – Main Screen



The Group screen displays the list of Groups created for use in the Vendor screen. Assign a vendor to a Group from the Group drop down list to identify/organize vendors. Screens and reports can be filtered and sorted by Group. A Group can be anything based on your business needs. For Property Management companies, a Group could be the specific Property. For Retail companies, the Group might be a Division. Groups could be the type of Vendor such as Contractor, Subcontractor, Vendor, etc. You can have unique insurance contact information and letter templates by Group. Use of the Group field is optional.

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Group – Add/Edit Screen

Enter a Group Name. If your want to override the company level insurance contact information, enter the Group contact information and check the Use Group Address and/or Use Group Signature. If you want to override the company level letter template, click Use Group Letter and select the Letter Template from the drop down box (Letter templates are built in the Follow-up Letter section of the software).

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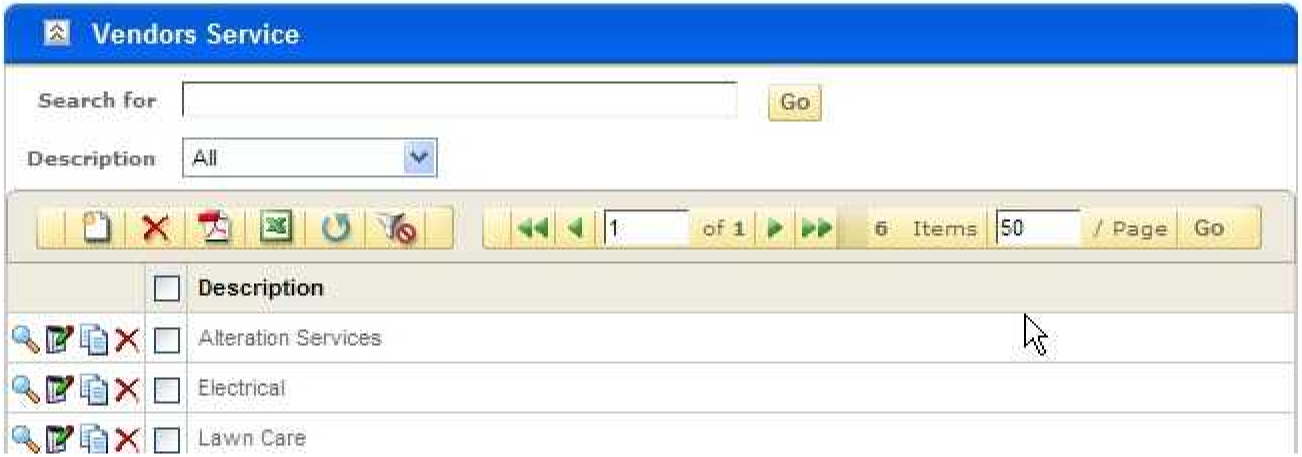
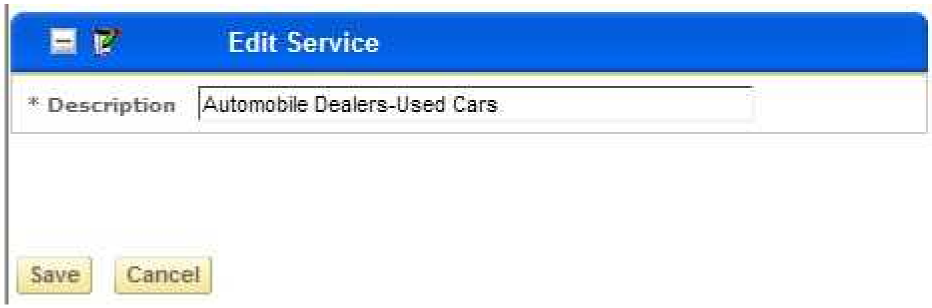
Service – Main Screen



The Service screen displays the list of Services created for use in the Vendor screen. Assign a Vendor to a Service from the Service drop down list to identify/organize vendors. Screens and reports can be filtered and sorted by Service. A Service can be anything based on business needs. Services could be the type of vendor service provided such as Electrical, Custodial, Food Service, etc. For Property Management companies, Service might be a mall location. Use of the Service is optional.

Service – Add/Edit Screen

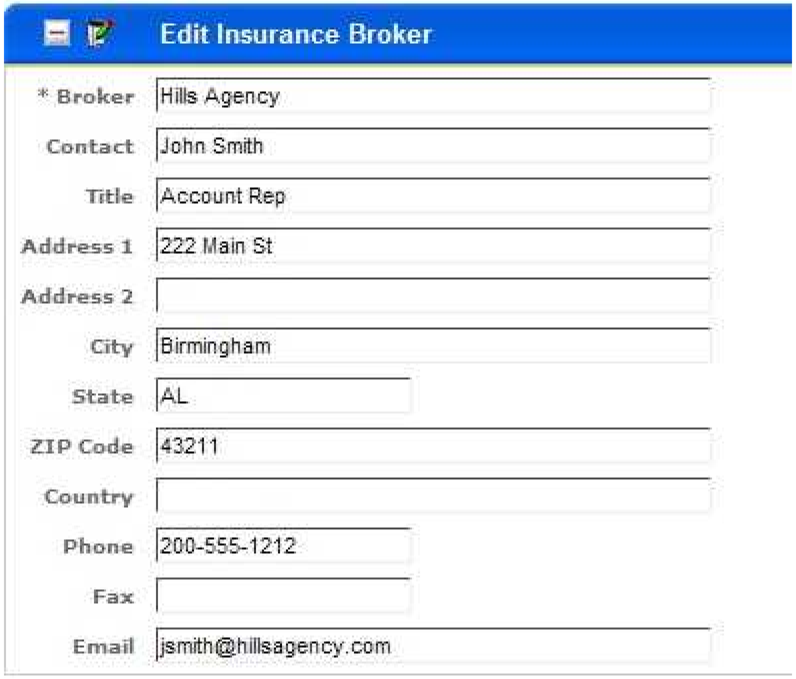


Enter the Service.

Broker – Main Screen

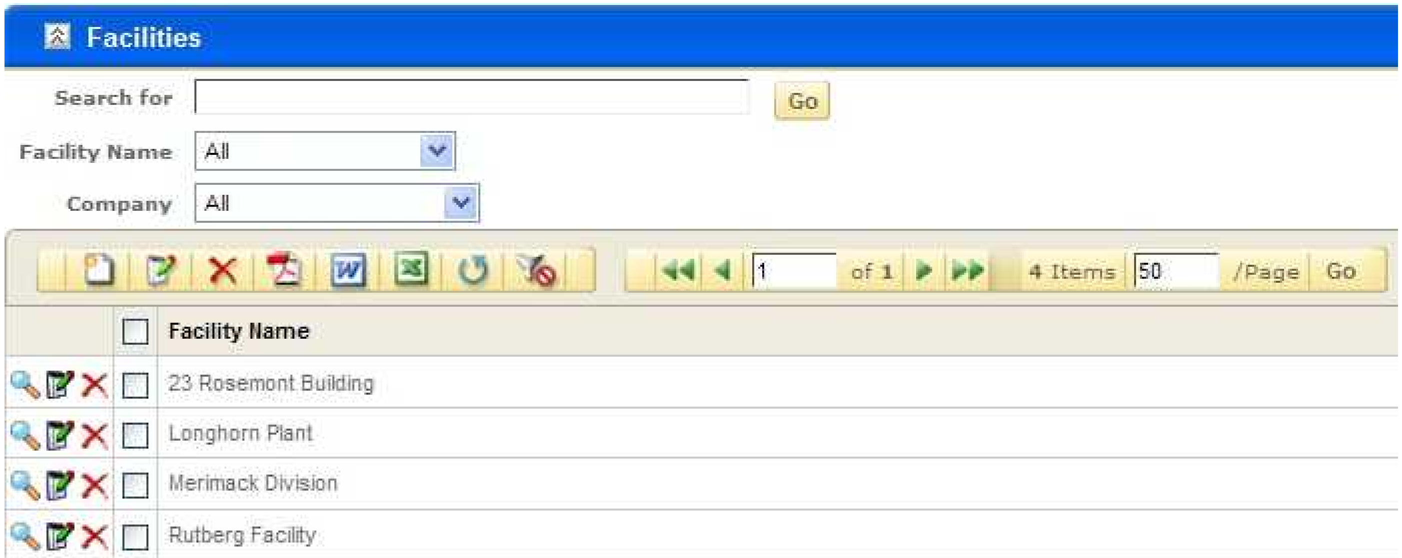
The Broker Screen displays the list of Brokers created for use in the Vendor screen. Assign up to 3 Brokers to a Vendor Insurance Certificate from the Broker drop down lists. Use of the Broker field is optional.

Broker – Add/Edit Screen



Enter the Broker company. Contact name, address, phone and email are optional. Future releases of iFastrack will allow you to send custom letters to the broker as part of insurance certificate tracking. Use of the Broker field is optional.

Facilities – Main Screen



The Facilities Screen displays the list of Facilities created for use in the Vendor screen. A Vendor can be assigned to unlimited Facilities. This would apply to situations were a Vendor is used by multiple Facilities and there is a need to identify each of them. Use of the Facility field is optional.

Facility – Add/Edit Screen

Enter the Facility name. Use of the Facility field is optional.

End of
Tutorial