

GG-One Software

iFastrack v8.10 Tutorial

Data Maintenance



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

Letter Copy (cc)

Search for

Name

1 of 1 2 Items 50 / Page Go

| <input type="checkbox"/> | Name | Title |
|--------------------------|------------|-------------------|
| <input type="checkbox"/> | Jill Smith | Insurance Advisor |
| <input type="checkbox"/> | Mary Jones | Mgr |

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

Add Letter Copies (cc)

Company

* Name

Title

Address 1

Address 2

City

State/Prov

Country

Phone Number

Email

ZIP Code

Fax

Followup Method

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

| <input type="checkbox"/> | Field Name | Type |
|--------------------------|-----------------------|-------|
| <input type="checkbox"/> | Aggregate | Limit |
| <input type="checkbox"/> | Bodily Injury | Limit |
| <input type="checkbox"/> | Combined Single Limit | Limit |

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

| | |
|---|---|
|  Edit Limit Field Name | |
| * Field Name | eg: Each Occurance Aggregate |
| Type | Limit  |

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

Policies – Main Screen



The screenshot shows a web application interface for managing policies. At the top, there is a blue header bar with a menu icon and the text "Policies". Below the header is a toolbar with several icons: a document, a trash can, a mail icon, a refresh icon, and a delete icon. To the right of the toolbar is a pagination control showing "1 of 1" items, "5 Items" per page, and a "25 / Page Go" button. Below the toolbar is a table with the following columns: "Policy Name", "Field - 1", "Field - 2", and "Field - 3". The table contains three rows of data, each with a checkbox and a set of icons (search, add, edit, delete, show) to the left of the policy name.

| <input type="checkbox"/> | Policy Name | Field - 1 | Field - 2 | Field - 3 |
|--------------------------|-------------------|-----------------------|-------------------|---------------|
| <input type="checkbox"/> | Auto Liability | Combined Single Limit | Property Damage | Bodily Injury |
| <input type="checkbox"/> | Excess | Each Occurrence | Aggregate | Unused |
| <input type="checkbox"/> | General Liability | Each Occurrence | General Aggregate | Product Comps |

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.

Policies – Add/Edit Screen

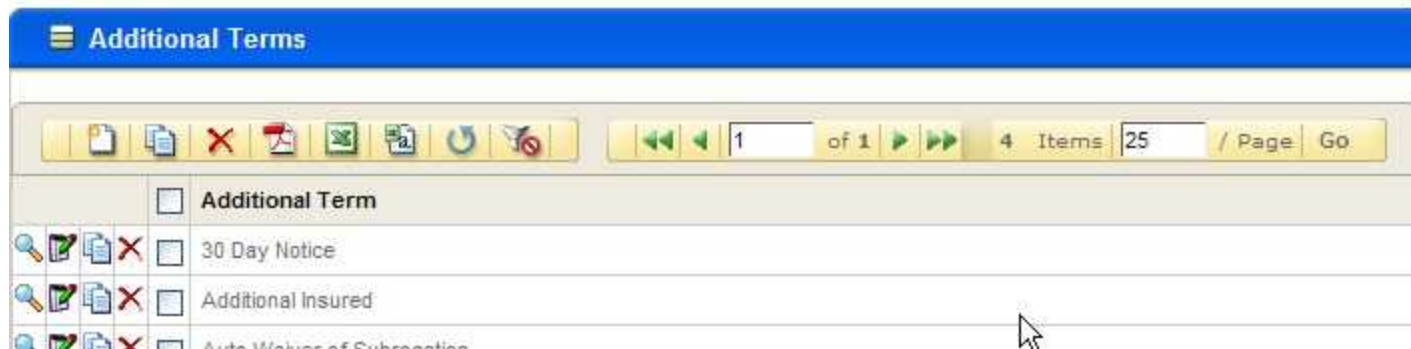


The screenshot shows a software interface titled "Edit Policy". It contains a form with the following fields:

| Field Label | Value | Action |
|---------------|-----------------------|------------------------------|
| * Policy Name | Auto Liability | |
| Field 1 | Combined Single Limit | Dropdown arrow and file icon |
| Field 2 | Property Damage | Dropdown arrow and file icon |
| Field 3 | Bodily Injury | Dropdown arrow and file icon |

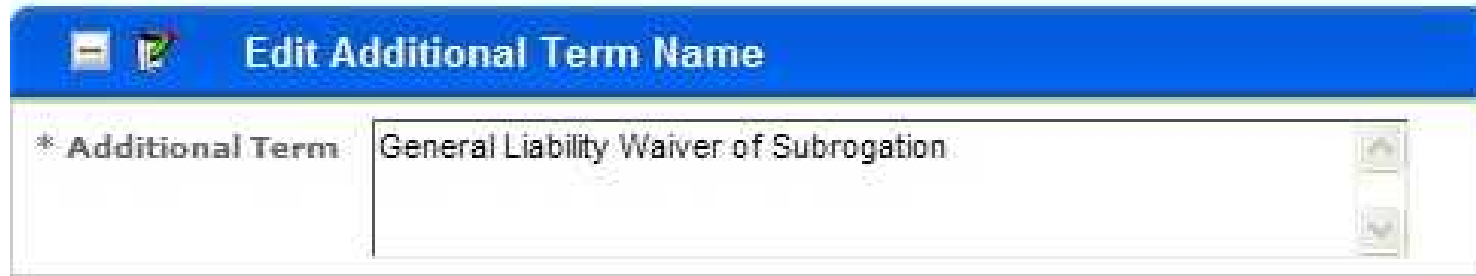
The Policy Add/Edit Screen allows you to enter a custom Policy Name and select up to three Limit fields to be tracked for the Policy.

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.

Additional Terms – Add/Edit Screen



| Edit Additional Term Name | |
|---------------------------|---|
| * Additional Term | General Liability Waiver of Subrogation |

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.

Insurance Rqmt Categories – Main Screen

Insurance Requirement Categories

Search for

Category

Before creating Insurance Requirement Categories:
You will need to build Limit Field Names, Policies and Additional Terms Name using Data Maintenance menu selections:

- 1) Limit Field Names
- 2) Policies
- 3) Additional Terms Name

Note: these tables come preloaded with common values, but may need changes or additions based on your requirements.

1 2 Items 50 / Page Go

| <input type="checkbox"/> | Category | Description |
|--------------------------|----------|--------------------------------|
| <input type="checkbox"/> | High 1 | High Risk Requirement Category |
| <input type="checkbox"/> | Standard | Standard Requirement Category |

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.

Insurance Rqmt Categories – Add/Edit Screen

Part 1 – Name and Description



| Add Insurance Requirement Category | |
|------------------------------------|--|
| * Category | Low Risk |
| Description | Minimum coverage required - only GL and WC |

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.

Insurance Rqmt Categories – Add/Edit Screen

Part 2 – Policies

Category Policies | Category Terms

Category Policy

1 of 1

 3 Items
 / Page

| <input type="checkbox"/> | Policy | Required | Limit 1 | Limit 2 | Limit 3 | Comb. w/XS |
|-------------------------------------|-------------------|--------------------------|---|--------------------------------------|-------------------------------------|-------------------------------------|
| <input checked="" type="checkbox"/> | Excess | <input type="checkbox"/> | Each Occurrence <input type="text"/> | Aggregate <input type="text"/> | Unused | |
| <input checked="" type="checkbox"/> | General Liability | | Each Occurrence \$2,000,000 | General Aggregate \$2,000,000 | Product Comps \$2,000,000 | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> | Workers Comp | | Each Accident \$1,000,000 | Disease Each Employee \$1,000,000 | Disease Policy Limit \$1,000,000 | <input type="checkbox"/> |

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

| <input type="checkbox"/> | Term Name |
|-------------------------------------|--------------------|
| <input checked="" type="checkbox"/> | 30 Day Notice |
| <input checked="" type="checkbox"/> | Additional Insured |

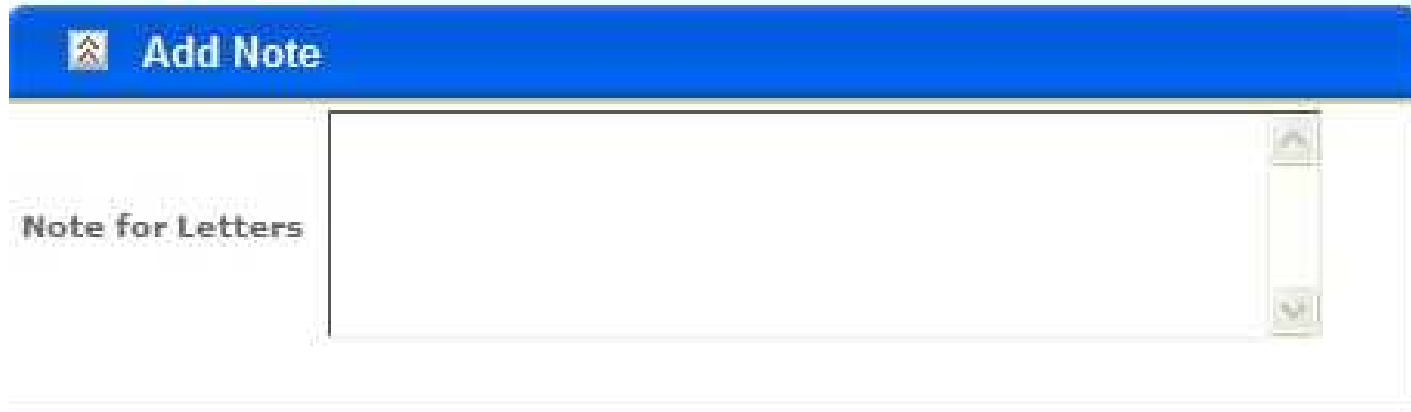
Additional Terms required for the selected Insurance Rqmt Category are listed. You can add new terms or delete terms on the list.

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.

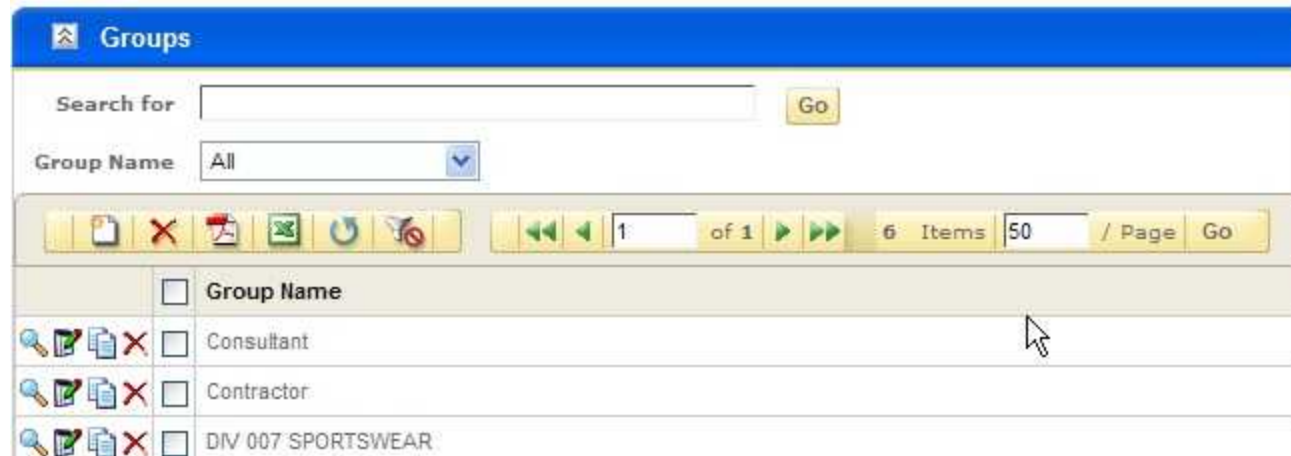
Notes For Letters – Add/Edit Screen



The screenshot shows a software interface for adding a note. At the top, there is a blue header bar with a small icon and the text "Add Note". Below the header, on the left side, is the label "Note for Letters". To the right of this label is a large, empty text area with a vertical scrollbar on its right edge, intended for entering a detailed note.

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.

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.

Group – Add/Edit Screen

*** Group Name**

Use Group Address

Company

Address

Address 2

City

Country

Phone eg: (555) 123-4567

Email

Use Group Signature

Signature

Title

Use Group Follow-up Letter

Group Letter **Use Company Letter**

Select Letter to be used for printing Group wide Follow-up Letters:
(if you do not want to use company letter).
This Letter over-rides the Letter selected at the Company level for this group only.

State/Prov **ZIP Code**

Fax eg: (555) 123-4567

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).

Service – Main Screen

The screenshot shows the 'Vendors Service' main screen. At the top, there is a blue header with the text 'Vendors Service'. Below the header, there is a search bar with the text 'Search for' and a 'Go' button. Underneath the search bar, there is a 'Description' dropdown menu with 'All' selected. Below the dropdown menu, there is a toolbar with various icons for search, delete, refresh, and other actions. To the right of the toolbar, there is a pagination control showing '1 of 1' items, '6 Items' per page, and a 'Go' button. Below the toolbar, there is a table with a 'Description' header and a checkbox for each row. The table contains three rows: 'Alteration Services', 'Electrical', and 'Lawn Care'. A mouse cursor is hovering over the 'Alteration Services' row.

| <input type="checkbox"/> | Description |
|--------------------------|---------------------|
| <input type="checkbox"/> | Alteration Services |
| <input type="checkbox"/> | Electrical |
| <input type="checkbox"/> | Lawn Care |

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



Windows-style dialog box titled "Edit Service".

* Description: Automobile Dealers-Used Cars

Buttons: Save, Cancel

Enter the Service.

Broker – Main Screen

The screenshot shows the 'Insurance Broker' main screen. At the top, there is a blue header with the text 'Insurance Broker'. Below the header, there is a search area with a 'Search for' text box and a 'Go' button. Underneath, there are two dropdown menus: 'Broker' set to 'All' and 'Contact' set to 'All'. A toolbar contains various icons for file operations and navigation. Below the toolbar, a pagination bar shows '1 of 1' items, '2 Items', and a page size of '50' with a 'Go' button. The main content is a table with the following data:

| <input type="checkbox"/> | Broker | Contact | Phone | Email |
|--------------------------|--------------------------|-------------|--------------|------------------------|
| <input type="checkbox"/> | Hills Agency | John Smith | 200-555-1212 | jsmith@hillsagency.com |
| <input type="checkbox"/> | Penbrook Insurance Group | Janice Long | 610-555-2233 | jlong@penbrookins.com |

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

| Edit Insurance Broker | |
|-----------------------|------------------------|
| * Broker | Hills Agency |
| Contact | John Smith |
| Title | Account Rep |
| Address 1 | 222 Main St |
| Address 2 | |
| City | Birmingham |
| State | AL |
| ZIP Code | 43211 |
| Country | |
| Phone | 200-555-1212 |
| Fax | |
| Email | jsmith@hillsagency.com |

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 screenshot displays the 'Facilities' main screen. At the top, there is a blue header with the title 'Facilities'. Below the header, there is a search bar labeled 'Search for' with a 'Go' button. Underneath the search bar, there are two dropdown menus: 'Facility Name' set to 'All' and 'Company' set to 'All'. Below the filters is a toolbar with various icons for document operations and a pagination control showing '1 of 1' items, '4 Items' total, and a page size of '50 /Page Go'. The main content area is a table with a header row and four data rows. Each row has a checkbox, a search icon, a delete icon, and a facility name.

| <input type="checkbox"/> | Facility Name |
|--------------------------|----------------------|
| <input type="checkbox"/> | 23 Rosemont Building |
| <input type="checkbox"/> | Longhorn Plant |
| <input type="checkbox"/> | Merimack Division |
| <input type="checkbox"/> | Rutberg Facility |

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 where 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



The screenshot shows a software window titled "Add Facility". The window has a blue header bar with a small icon and the text "Add Facility". Below the header is a text input field with the label "*Facility Name" to its left. The input field is empty and has a vertical scrollbar on its right side. Below the input field are two yellow buttons: "Save" and "Cancel".

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

**End of
Tutorial**