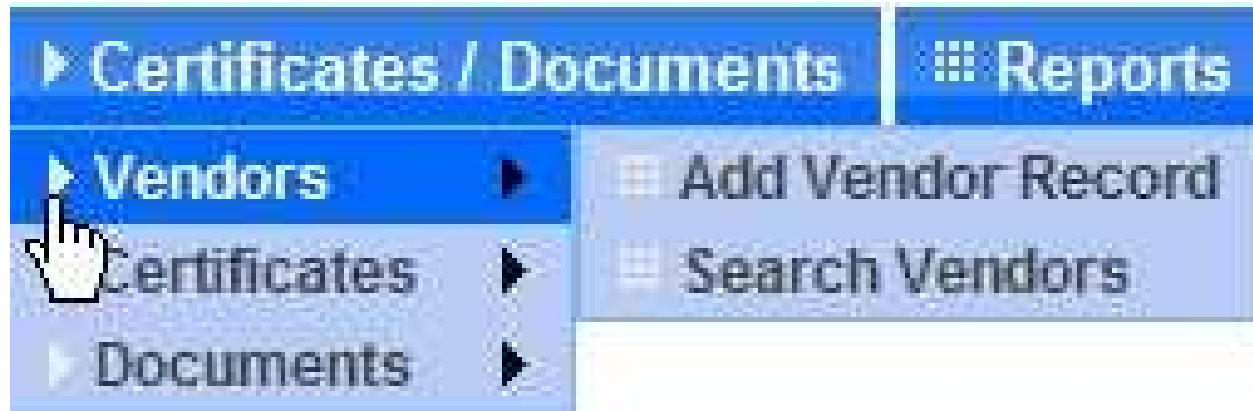


iFastrack v8.09 Tutorial

Vendors

This tutorial provides an overview of iFastrack Vendor data entry.

iFastrack Menu Screen



The Vendor record is added to the system before adding Insurance Certificates or Documents/Contracts. To edit existing vendors, select Search Vendors. To add a new vendor, select Add Vendor Record.

Vendor Search Screen

The screenshot shows a web application interface for searching vendors. It features a blue header bar with the title "Search Vendors". Below the header, there are several search filters on the left and search input fields on the right. The filters include Vendor, Group, Service, Contact, Xref, and Vendor Status, each with a dropdown menu set to "All". The search input fields are labeled "Search Vendors", "Search Groups", "Search Services", "Search Contact", "Search Xrefs", and "Search Vendor/Xref". A "Go" button is located next to the "Search Vendors" field.

Below the search filters, there is a toolbar with various icons for document management and navigation. A pagination bar shows "1 of 1" items, "4 Items" total, and a page size of "50 / Page Go".

<input type="checkbox"/>	Vendor	Group	Service	Contact	Xref	Vendor Status
<input type="checkbox"/>	Ladow Construction Company	Unit 15	Construction	Office Manager		Active
<input type="checkbox"/>	Martin's Landscaping	Unit 10	Lawn Care	Management Office	P4566	Active

Data is organized by vendor. A vendor can have unlimited insurance certificates and documents. Insurance Certificates and Documents must have unique identifiers by vendor such as project or any client defined naming method. Add, edit, delete or view a vendor from this screen.

Add Vendor



The screenshot shows a web form titled "Add Vendor". The form has a blue header bar with a home icon and the text "Add Vendor". Below the header is a text input field with the label "* Vendor".

Before entering detail vendor data, first add the vendor name to the system. Once the name is saved, the Edit Vendor screen will appear to enter detail vendor information, documents and certificates.

Vendor Screen

Contact Information

The screenshot shows a web form titled "Edit Vendor" with a blue header. The form contains the following fields and values:

* Vendor	Williams Washing Co	Vendor Status	Active
Group	Unit 22	Service	Maintenance
Xref		Title	Insurance Manager
Contact	Harold Hill	ZIP Code	08700
Address	300 Roosevelt Blvd	Extension	120
Address 2	Suite 500	Followup Method	Print
City	Wyndham		
State/Prov	NJ		
Country			
Phone Number	eg: (555) 123-4567 212-444-7000		
Fax	eg: (555) 123-4567 212-444-7012		
Email			

At the bottom of the form, there are two buttons: "Save" and "Cancel". Below the buttons is a tabbed interface with the following tabs: "Certificates", "Documents", "Attachments", "Letter History", and "Notes".

The top part of the Vendor screen contains basic contact information along with drop down boxes to select the Vendor's Group and Service. All fields except Vendor name are optional.

Notes, Documents, Certificates, Attachments and Letter History are accessible by clicking on their tab.


Vendor Screen

Certificates Tab

Certificates Documents Attachments Letter History Notes

Certificates

1 of 1 2 Items 25 / Page Go

	<input type="checkbox"/>	Certificate	Document #	Cert Reference	Rqmt Category	Ins Status	Ins Status Detail	Notes	Cert Status	Last Letter
  	<input type="checkbox"/>	Site 100	P124408	240 Washington Circle	High 1	Missing	Auto Liability - Missing General Liability - Expir...	The Vendor has 15 subcontractors on this site.	Active	Ltr6643-679.Pdf
  	<input type="checkbox"/>	Site 190	P08644	89 Park Place	High 1	Inadequate Limits	Auto Liability - Inadequate Limits Inadequate Canc...		Active	Ltr6644.Pdf

The Certificates tab displays all insurance certificates for a selected vendor. Add, edit, delete and view a specific certificate for the vendor. Summary information is displayed for each certificate including Certificate name, Document # (if certificate is tied to a document), Cert Reference, Insurance Rqmt Category, Insurance Status summary and detail, certificate notes, status and PDF image of last follow-up letter sent.

Vendor Screen

Documents Tab

<input type="checkbox"/>	Document #	Doc Desc	Certificate	Notes	Doc Status
<input type="checkbox"/>	P08644	Maintain Grounds at site 190	Site 190	Happy with service - Likely to renew for 2 more ye...	Active
<input type="checkbox"/>	P124408	Maintain Grounds of Site 100	Site 100		Active

The Documents tab displays all documents/contracts for a selected vendor. Add, edit, delete and view a specific document for the vendor. Summary information is displayed for each document including Document #, Document Description, Certificate (if tied to a certificate), document notes and status.

Vendor Screen Attachments Tab

<input type="checkbox"/>	Description	Date Added	File Size	Attachment
<input checked="" type="checkbox"/>	Acord Form	7/11/2008 7:56 AM	386,358	Acord Form.pdf

The Attachments tab displays all attachments for a selected vendor. Add, delete and view a specific attachment. Attachments can be any type of file extension (i.e. xls, pdf, doc, jpg, bmp, wav, wmv). Click on the Attachment name to view the attachment.

Vendor Screen

Letter History Tab

Certificates Documents Attachments Letter History Notes

Letter History

Certificate All Letter Type All User All

Date Printed to Go

1 of 1 1 Items 25 / Page Go

<input type="checkbox"/>	Date Printed	Certificate	User	Letter Type	Letter Data
<input checked="" type="checkbox"/>	4/20/2010 7:38 AM	Site 100	precca	Certificate	Ltr6643-679.Pdf

The Letter History tab displays a list of all letters sent to the vendor. Currently letters are only available for Insurance Certificate non-compliance notification, however, future releases will allow letters for Documents and general Vendor communication.

Vendor Screen

Notes Tab

The screenshot shows a web application interface with a navigation bar at the top containing tabs for Certificates, Documents, Attachments, Letter History, and Notes. The Notes tab is active. Below the navigation bar is a blue header with a home icon and the word 'Notes'. A 'User' dropdown menu is set to 'All'. Below this is a toolbar with icons for adding, deleting, and editing notes, along with pagination controls showing '1 of 1' items and a '25 / Page Go' option. A table below displays a single note entry.

<input type="checkbox"/>	Date	User	Note
<input type="checkbox"/>	4/20/2010 8:32 AM	precca	This is a vendor note for Williams Washing.

Enter unlimited notes. A list displaying the Date entered, User, and Note are displayed.

**End of
Tutorial**