

GG-One Software

iFastrack v8.10 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.

The Search Vendors By Facility is used to display vendors for a selected Facility. Use of the Facility field is optional. Facilities are assigned in the Edit Vendor Screen.

Vendor Search Screen

The screenshot displays the 'Search Vendors' interface. 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"/>	Landow 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.

Facility Search Screen

🏠 Search Vendors by Facility

Vendor All ▼ **Search Vendor** Go

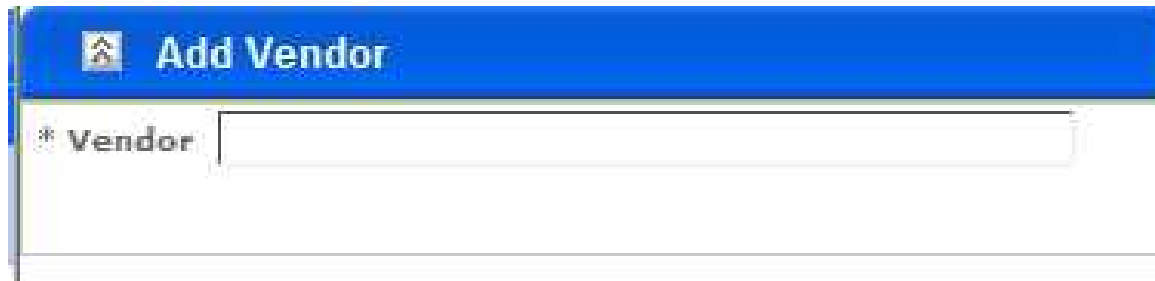
Facility All ▼ **Search Facility**

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		Facility Name	Vendor Name	Group	Service	Contact	Xref	Vendor Status
	<input type="checkbox"/>	23 Rosemont Building	Bainbridge Co	Consultant	Electrical	Regan Rice	S34-9	Active
	<input type="checkbox"/>	Merimack Division	Bainbridge Co	Consultant	Electrical	Regan Rice	S34-9	Active
	<input type="checkbox"/>	Merimack Division	Lauren and Sons	Consultant	Maintenance	Insurance Dept.	Fix Machines	Inactive
	<input type="checkbox"/>	Merimack Division	Roberts Lawn Service	Consultant	Lawn Care	General Manager	T88	Active
	<input type="checkbox"/>	Rutberg Facility	Roberts Lawn Service	Consultant	Lawn Care	General Manager	T88	Active

Search by Vendor or Facility name. Add, edit, delete or view a vendor from this screen.

Add Vendor



The screenshot shows a software interface for adding a vendor. It features a blue header bar with a home icon and the text "Add Vendor". Below the header is a white form area with a label "* Vendor:" followed by an empty text input field.

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 the 'Edit Vendor' screen with the following data:

Field	Value
*Vendor	Williams Washing Co
Vendor Status	Active
Group	Unit 22
Service	Maintenance
Xref	
Contact	Harold Hill
Title	Insurance Manager
Address	300 Roosevelt Blvd
Address 2	Suite 500
City	Wyndham
State/Prov	NJ
ZIP Code	08700
Country	
Phone Number	212-444-7000
Extension	120
Fax	212-444-7012
Email	
Followup Method	Print
Notes	This is a vendor note for Williams Washing.

Buttons: Save, Cancel

Navigation tabs: Certificates, Documents, Attachments, Facilities, Letter History, Notes

The top part of the Vendor screen contains basic contact information. To select a Group or Service, type in the desired name and select from the drop down list which appears. Only Groups and Services set up in Data Maintenance can be selected. All fields except Vendor name are optional. The Notes field displays all notes entered in the notes tab.

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

Vendor Screen

Certificates Tab

Certificates Documents Attachments Facilities 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 Insurance Carrier Acadia Insurance Company has an unacceptable rating of A ...	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 Cancellation Notice.		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 years.	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"/>	Date Added	Description	File Size	Attachment
<input type="checkbox"/>	7/11/2008 7:56 AM	Acord Form	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. Note that Attachment file names cannot contain ampersands, quotes or slashes.

Vendor Screen

Facilities Tab

The screenshot shows a web application interface for the 'Facilities' tab. At the top, there are several tabs: 'Certificates', 'Documents', 'Attachments', 'Facilities' (which is highlighted), 'Letter History', and 'Notes'. Below the tabs is a blue header bar with a home icon and the text 'Facilities'. Underneath the header is a control bar with several icons: a document icon, a red 'X' icon, a refresh icon, a left arrow icon, a right arrow icon, a text input field containing '1', the text 'of 1', another left arrow icon, another right arrow icon, the text '2 Items', a text input field containing '25', the text '/Page', and a 'Go' button. Below the control bar is a table with two columns: a checkbox column and a text column. The table contains three rows: a header row with a checkbox and the text 'Facility', a data row with a checkbox, a red 'X' icon, and the text 'Broomall Plant', and another data row with a checkbox, a red 'X' icon, and the text 'Vancouver Factory'.

<input type="checkbox"/>	Facility
<input type="checkbox"/>	Broomall Plant
<input type="checkbox"/>	Vancouver Factory

The Facilities tab displays all Facilities that use the vendor. Add and delete Facilities using this screen. Facilities for selection are built in Data Maintenance.

Vendor Screen Letter History Tab

<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, Facilities, Letter History, and Notes. The Notes tab is selected and highlighted in blue. Below the navigation bar is a blue header with a home icon and the text 'Notes'. Underneath is a yellow control bar with icons for a document, refresh, and navigation arrows. It also displays '1 of 1' items, '1 Items' per page, and a 'Go' button. Below this is a table with columns for Date, User, and Note. A single row is visible with the date '4/20/2010 8:32 AM', user 'precca', and note 'This is a vendor note for Williams Washing.'.

<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**