

iFastrack v8.09 Tutorial Documents

This tutorial provides an overview of iFastrack Document data entry.

iFastrack Menu Screen



Existing documents/contracts can be accessed from the Certificates/Documents drop down menu.

Document Search Screen

🔍 **Search Documents**

Vendor	All ▼	Search Vendor	<input type="text"/>	<input type="button" value="Go"/>
Group	All ▼	Search Group	<input type="text"/>	
Service	All ▼	Search Service	<input type="text"/>	
Xref	All ▼	Search Xref	<input type="text"/>	
Document Xref	All ▼	Search Document xref	<input type="text"/>	
Document #	All ▼	Search Document #	<input type="text"/>	
Doc Status	All ▼			
Ins Status	All ▼			

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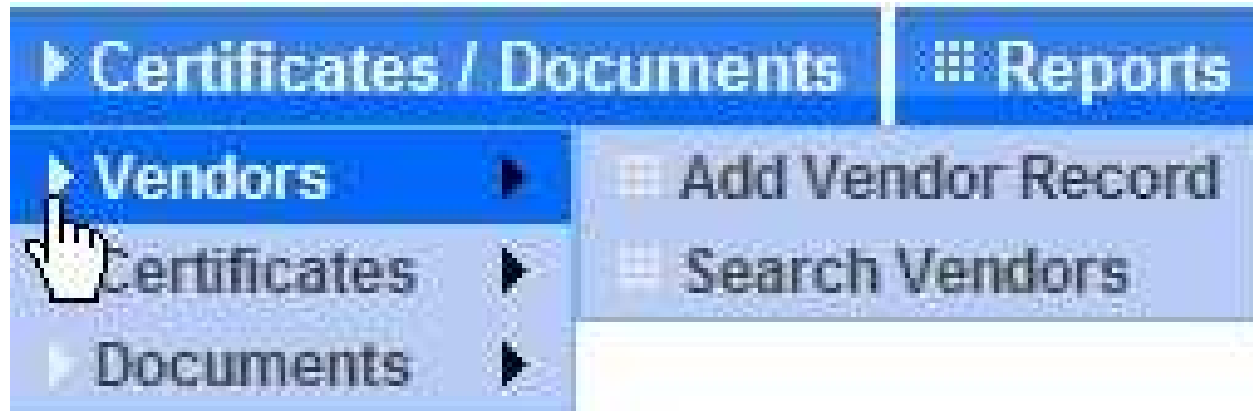
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	Vendor	Document #	Doc Desc	Group	Service	Xref	Document Xref	Expire Date	Ins Status	Doc Status
🔍 📄 ✖️	<input type="checkbox"/> Martin's Landscaping	2010-001	Contract for 2010 Services	Unit 10	Lawn Care	P4566	Morgan	12/31/2010	Expired	Active
🔍 📄 ✖️	<input type="checkbox"/> Williams Washing Co	P08644	Maintain Grounds at site 190	Unit 22	Maintenance		Orange Code	3/1/2011	Inadequate Limits	Active
🔍 📄 ✖️	<input type="checkbox"/> Williams Washing Co	P124408	Maintain Grounds of Site 100	Unit 22	Maintenance			7/15/2008	Missing	Active

This screen displays all documents entered for all active Vendors. Locate documents through the drop down filters or the Search options. Documents can be edited, deleted and viewed from this screen

iFastrack Menu Screen



Documents can also be accessed through the Vendor screen. New documents can only be added from the Vendor screen. To add a document, first edit the Vendor and then click on the Document Tab.







Vendor Screen

Documents Tab

Notes Certificates Documents Attachments Letter History

Documents

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<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 Add Document

Add Vendor Document

* Document # * Doc Status

Doc Desc

Doc Reference

Save Cancel

The Add Document screen is the first part to creating a document record for a vendor. Enter a Vendor unique document # such as the contract number, lease number or other internal identifier. Document numbers can be any combination of alpha characters, numbers and dashes up to 50 characters. Enter a short document description. The Doc Reference is an open field to enter client specific identifying information. Once the document screen is saved, the Edit Document screen appears to complete the document entry.

Document Screen

General Document Data

The screenshot shows a web application window titled "Edit Document". The form contains the following fields and values:

Document #	P08644	Doc Status	Active
Doc Desc	Maintain Grounds at site 190		
Doc Reference	Orange Code		
Contact		Title	
Phone Number		Extension	
Email			
Approval Date	1/21/2007	Closed date	
Start Date	3/1/2007	Expire Date	3/1/2011
Certificate	Site 190		
Notes	Happy with service - Likely to renew for 2 more years.		

At the bottom of the form, there are two buttons: "Save" and "Cancel". Below the buttons is a navigation bar with four tabs: "Action Items", "Attachments", "Financials", and "Letter History".

The Document screen contains general information about the document including Document #, Document Description, Doc Reference, Contact, Title, Phone Number, Extension, Email, Approval Date, Expire Date, Closed Date, Certificate (if tied to a certificate) and document notes. The Approval Date, Closed Date and Expiration Date can be tracked in the Document Reports section. If the document requires proof of insurance and you are tracking the certificate, select the corresponding vendor certificate from the drop down list (the certificate record must be created prior to selection. The document can be edited and the certificate selected later). There is a Notes section to enter unlimited internal notes about the document.

Document Screen

Action Items Tab

Item Desc:

Item Code:

Due Date: to

Completed Date: to

Tracking Date: to

of

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<input type="checkbox"/>	Item Desc	Item Code	Tracking Date	Due Date	Completed Date	Amount Added	Amount Paid	Notes
<input type="checkbox"/>	Bid form due back from company	B002		10/15/2009		\$0.00	\$0.00	Bid contains pricing for lawn mowing, mulcing and ...
<input type="checkbox"/>	Bond	001	1/1/2010			\$0.00	\$0.00	
<input type="checkbox"/>	Contract Award	C01			5/1/2009	\$250,000.00	\$0.00	

The Action Items Tab displays all Action Items entered for a document. Each Action Item has a Item Description, Item Code, Tracking Date, Due Date, Completion Date, Amount Added, Amount Paid and Notes. All fields except description are optional. There are reports for Tracking Date soon to expire or expired and for Action Items Due Soon or Past Due (based on Due Date, where there is no Completion Date entered).

Document Screen

Add Action Item Screen

The screenshot shows a software window titled "Add Action Item". The window contains the following fields:

- *Item Desc: A text input field.
- Item Code: A text input field.
- Due Date: A date input field with a calendar icon.
- Completed Date: A date input field with a calendar icon.
- Tracking Date: A date input field with a calendar icon.
- Amount Added: A text input field containing "\$0.00".
- Amount Paid: A text input field containing "\$0.00".
- Notes: A large text area for entering notes, with a vertical scrollbar on the right side.

Each Action Item has a Item Description, Item Code, Tracking Date, Due Date, Completion Date, Amount Added, Amount Paid and Notes. All fields except description are optional. There are reports for Tracking Date soon to expire or expired and for Action Items Due Soon or Past Due (based on Due Date, where there is no Completion Date entered). Amount Added increases the Amount Owed total. Amount Paid increases the Amount Paid total. Unlimited internal notes can be entered for each Action Item.

Document Screen

Attachments Tab

<input type="checkbox"/>	Description	Date Added	User	File Size	Attachment
<input checked="" type="checkbox"/>	2007 Contract	4/20/2010 1:25 PM	precca	2,875	2007 Contract With Williams Washing.pdf

The Attachments Tab displays all attachments for the document. Each vendor document can have unlimited attachments in multiple formats (jpg, pdf, bmp, doc, xls, wav, wmv). Attachments are copies of the original file and saved in the iFastrack directories. Click the Attachment file name to view the attachment.

Document Screen

Financials Tab

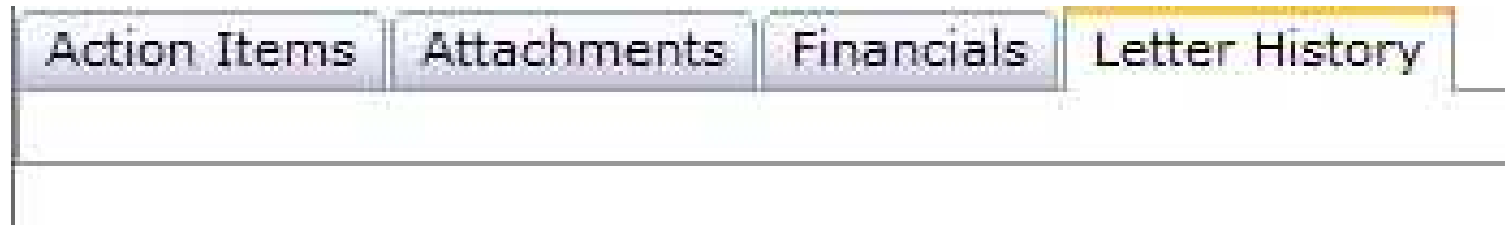
Action Items | Attachments | **Financials** | Letter History

Amount Owed	Amount Paid	Balance
\$250,000.00	\$15,000.00	\$235,000.00

The Financials Tab displays the totals for financial data entered in the Action Items Tab. Tracking financial data (optional) includes entries for amount owed (original contract value or change control entries altering the contract value) and amount paid (payments or other entries reducing the amount owed).

Document Screen

Letter History Tab



The Letter History tab displays a list of all letters sent to the vendor for the document. This is a future feature of the software.

**End of
Tutorial**