

GG-One Software

iFastrack v8.10 Tutorial

Letters



This tutorial provides an overview of the iFastrack Letter processing including creating templates, printing letters, envelopes and labels.

Follow-up Letter Menu Screen



Follow-up Letters displays a drop down menu for selecting a letter activity. This includes printing/emailing follow-up letters and envelopes/labels, reprinting past letters/envelopes, adding/editing letter templates and envelope templates and viewing letters printed by print session.

Print Letters/Envelopes Print/Email List for Processing

Insurance Follow-up Letters to Be Printed

Vendor: All | Search Vendors: Go

Group: All | Search Groups:

Service: All | Search Services:

Certificate: All | Doc Number: All

Vendor Xref: All | Certificate Xref: All

Certificate Status: All | Print Status: All

V/CC: All | P/E: All

All Vendors listed below require an insurance follow-up letter to be printed. (List includes CC copies) [Follow-up Letters Instructions](#)

Print Letters | Print Envs/Labels | Mark as Printed | 1 of 1 | 1 Items | 250 / Page | Go

	Vendor	Certificate	Contact	Group	Service	Doc Number	Vend Xref	Cert Xref	Certificate Status	Letters Sent	V/CC	P/E	Print Status
<input type="checkbox"/>	Williams Washing Co	Site 190	Harold Hill	Unit 22	Maintenance	P08644		89 Park Place	Inadequate Limits	2	V	P	

The Insurance Follow-up Letters To Be Printed screen contains the list of Vendor Certificates that are non-compliant and require follow-up letters to be printed or emailed. If a letter has cc copies, these will also be listed for processing. The print process is in groups of 250 letters. If there are more than 250, go to the next page and process the next group until all letters have been processed. Printed letters appear on the screen in MS Word format and can be changed before printing (note that changes are not saved in the PDF history). Emailed letters are sent out immediately and do not appear on the screen. Be sure to 'Mark as Printed' all letters processed or the system will not know the letters were printed and will continue to display the letters in the list.

V/CC column – V (vendor letter), CC (cc copy of letter).

P/E column – P (print letter), E (Email letter)

Reprint Past Letters/Envelopes

RePrint Follow-Up Letters

Vendor: All

Group Name: All

Service: All

Certificate: All

Vend Xref: All

Certificate Status: All

Date Printed: to

Search Vendors:

Search Groups:

Search Services:

Doc Number: All

Cert Xref: All

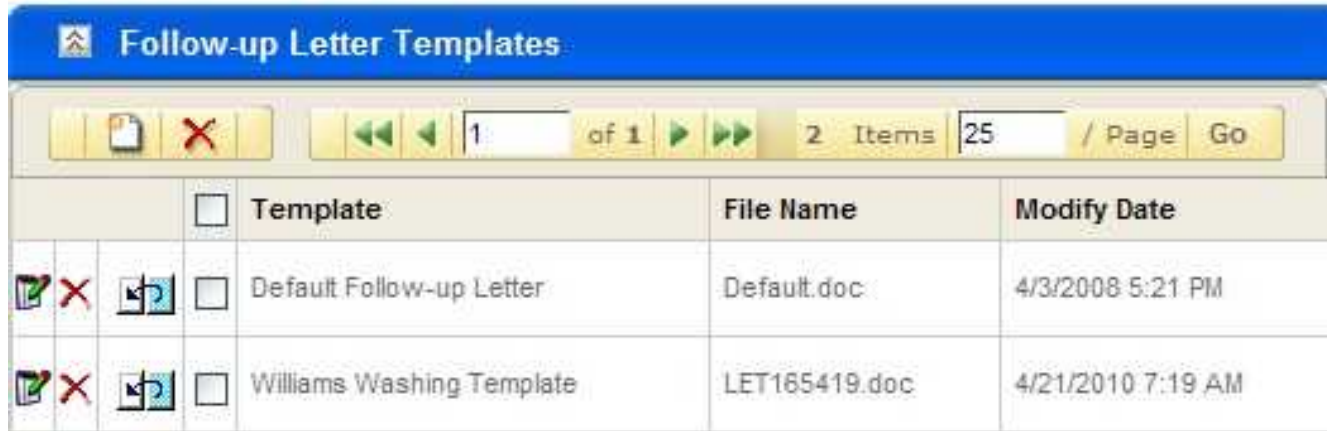
P/E: All

1 of 1 ▶▶
3 Items 250 / Page







	Date Printed	Vendor	Certificate	Contact	Group	Service	Certificate Status	Letters Sent	P/E	Last Letter
<input type="checkbox"/>	4/20/2010 8:01 AM	Martin's Landscaping	General	Management Office	Unit 10	Lawn Care	Expired	1	P	Ltr7362-805.Pdf
<input type="checkbox"/>	4/20/2010 7:38 AM	Williams Washing Co	Site 100	Harold Hill Insurance Manager	Unit 22	Maintenance	Missing	3	P	Ltr6643-679.Pdf
<input type="checkbox"/>	4/20/2010 7:38 AM	Simpson and Company	General	John Smith Office Manager	Unit 10	Electrical	Soon to Expire	1	P	Ltr7361-633.Pdf

The Reprint Follow-up Letters screen displays the list of vendor letters already printed. The last follow-up letter printed/emailed for a Vendor Certificate is saved in PDF format and accessible from this screen, the Vendor and Insurance Certificate screens and the Print Sessions screen. Letters can be viewed and printed by clicking the Last Letter PDF file. To re-process a letter, delete it from this list. The letter will reappear on the main Print Follow-up letters screen.

Letter Templates Screen

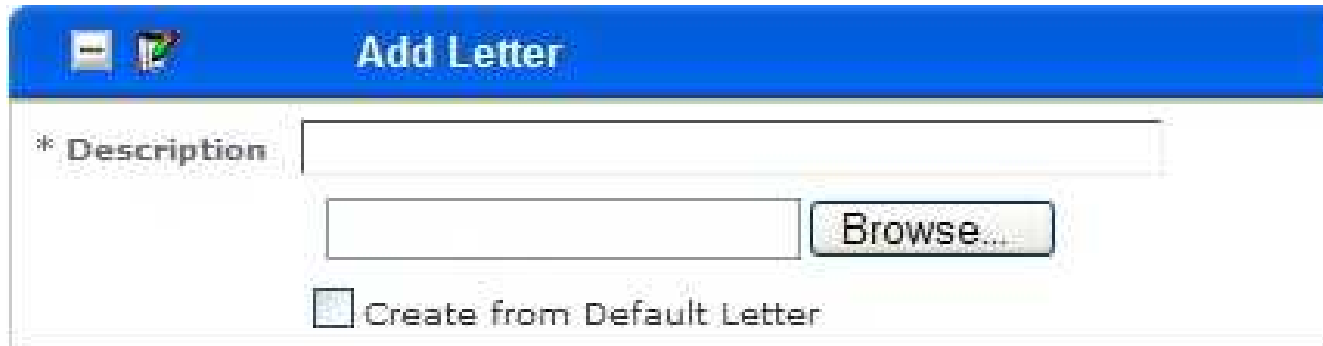


The screenshot shows a web interface titled "Follow-up Letter Templates". At the top, there is a blue header bar with the title. Below the header is a toolbar with icons for adding, deleting, and navigating. A pagination bar shows "1 of 1" items, "2 Items" per page, and a "Go" button. The main content is a table with columns for "Template", "File Name", and "Modify Date". Each row has a checkbox and a set of icons (copy, delete, refresh) to the left of the template name.

	<input type="checkbox"/>	Template	File Name	Modify Date
  	<input type="checkbox"/>	Default Follow-up Letter	Default.doc	4/3/2008 5:21 PM
  	<input type="checkbox"/>	Williams Washing Template	LET165419.doc	4/21/2010 7:19 AM

The software comes with a default Letter Template which can be copied and Edited. We recommend not changing the master default letter, but instead creating a new template by copying the Default Template (see Add Template). Each Company level and Group can have a unique template. Templates are in MS Word format and edited using MS Word protocols. Templates can be changed by adding Mail Merge fields (see User Guide for list of field names), text and graphics. The detail non-compliance list is computer generated and not available for editing.

Add Letter Template Screen



* Description

Browse...

Create from Default Letter

Add a new MS Word template by either selecting an existing template saved on the computer via the Browse box or copying the Default Letter and then editing the copied template. Note that the template uses specific mail merge words that must match the software names (see User Guide for available Mail Merge fields). Add/delete Merge fields, add/change/delete text, add graphics, change fonts and spacing. The template is restricted to one page. The edited template must first be saved to the desktop and then selected in the Browse box for saving into the iFastrack databases.

Edit Letter Template Screen

Edit Letter Template

* Description

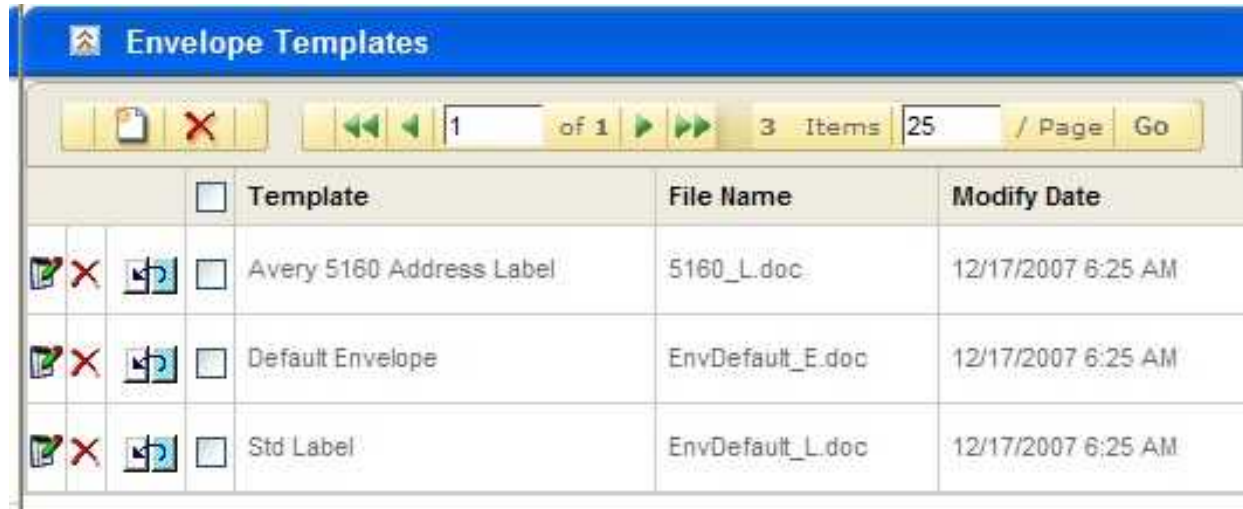
Edit Letter (To edit a Letter Template you must have Word installed on your station)

- After editing your letter, save your updated Word document onto your workstation and note the saved file name and location.
- Close MS Word
- Press the below **Browse button** to locate newly changed Word Document and select
- Press **Save button** to **Update iFastrack** with new changes










Edit a letter template using MS Word. Note the directions listed under the Edit Letters button prior to clicking the button. Your letter template will be opened in MS Word where you can make your changes. The template uses specific mail merge words that must match the software names (see User Guide for available Mail Merge fields). You can add/delete Merge fields, add/change/delete text, add graphics, change fonts and spacing. The template is restricted to one page.

Save the MS Word template onto your computer first (note the file name and location), then use the Browse box to locate the template just saved and Save on the iFastrack screen to load into the software.

Envelope/Label Templates Screen



The screenshot shows a software interface titled "Envelope Templates". At the top, there is a blue header bar with the title. Below the header is a navigation bar with icons for adding, deleting, and refreshing, along with a page indicator showing "1 of 1" items and a "3 Items / Page" setting with a "Go" button. The main content is a table with three columns: "Template", "File Name", and "Modify Date". Each row in the table has a checkbox in the "Template" column and a set of icons (a green checkmark, a red X, and a blue refresh icon) to the left of the checkbox.

	<input type="checkbox"/>	Template	File Name	Modify Date
  	<input type="checkbox"/>	Avery 5160 Address Label	5160_L.doc	12/17/2007 6:25 AM
  	<input type="checkbox"/>	Default Envelope	EnvDefault_E.doc	12/17/2007 6:25 AM
  	<input type="checkbox"/>	Std Label	EnvDefault_L.doc	12/17/2007 6:25 AM

The software comes with default Envelope and Label Templates which can be copied and Edited. We recommend not changing the master default template, but instead creating a new template by copying the Default Template (see Add Envelope/Label Template). Each Company level can have a unique template. Templates are in MS Word format and edited using MS Word protocols. Add Mail Merge fields (see User Guide for list of field names), text and graphics.

Add Envelope/Label Template Screen



The screenshot shows a software window titled "Add Envelope / Label". Inside the window, there is a section labeled "* Description" followed by a text input field. Below this is another text input field with a "Browse..." button to its right. Underneath these fields are three radio button options: "Upload New (use Browse to locate)", "Copy from Default Envelope" (which is selected), and "Copy from Default Label".

Add a new MS Word template by either selecting an existing template saved on your computer via the Browse box or copying the Default Envelope or Label and then editing the copied template. Note that the template uses specific mail merge words that must match the software names (see User Guide for available Mail Merge fields). Add/delete Merge fields, add/change/delete text, add graphics, change fonts and spacing. The template is restricted to one page.

Edit Envelope/Label Template Screen

* Description: Default Envelope

Edit Envelope (To edit an Envelope Template you must have Word installed on your station)

- After editing your letter, save your updated Word document onto your workstation and note the saved file name and location.
- Close MS Word
- Press the below **Browse button** to locate newly changed Word Document and select
- Press **Save button** to **Update iFastrack** with new changes

Edit an envelope/label template using MS Word. Note the directions listed under the Edit Envelope button prior to clicking the button. The envelope/label template will be opened in MS Word. The template uses specific mail merge words that must match the software names (see User Guide for available Mail Merge fields). Add/delete Merge fields, add/change/delete text, add graphics, change fonts and spacing. The template is restricted to one page.

Save the MS Word template on your computer first (note the file name and location), then use the Browse box to locate the template just saved and Save on the iFastrack screen to load into the software.

Print Sessions Screen

The screenshot shows the 'Print Sessions' screen with the following details:

- User:** All
- Session Date:** to
- Go** button
- Navigation:** 1 of 1, 54 Items, 100 / Page, Go
- Table:**

<input type="checkbox"/>	User	Session Date	Session Letters
<input checked="" type="checkbox"/>	precca	4/20/2010 8:00 AM	SES169435.Pdf
<input checked="" type="checkbox"/>	precca	4/20/2010 7:38 AM	SES165299.Pdf
<input checked="" type="checkbox"/>	johnr	6/22/2009 12:04 AM	SES169435.Pdf
<input checked="" type="checkbox"/>	johnr	5/6/2009 12:41 PM	SES164358.Pdf

The Print Sessions screen displays each print session including the letters printed in PDF format, date/time printed and the User who printed the session. Access a Print Session by clicking the PDF file under the Session Letters column. Note that duplicates of the letter will appear if cc copies were also printed/emailed.

**End of
Tutorial**