

iFastrack v8.09 Tutorial

Follow-up 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](#)

1 of 1

 1 Items | 250 / Page

| | 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 Search Vendors:

Group Name: All Search Groups:

Service: All Search Services:

Certificate: All Doc Number: All

Vend Xref: All Cert Xref: All

Certificate Status: All P/E: All

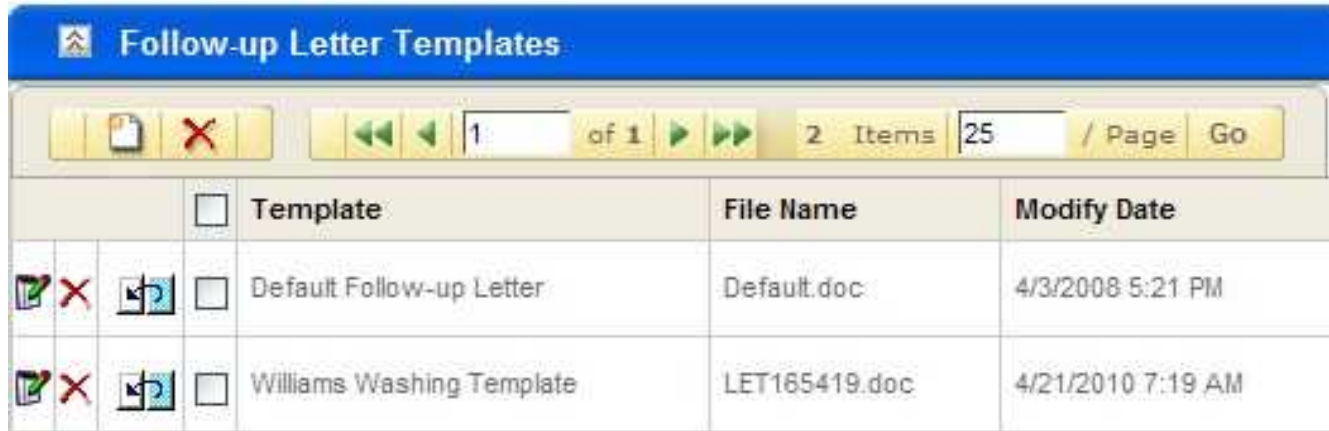
Date Printed: to

of 1 / 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

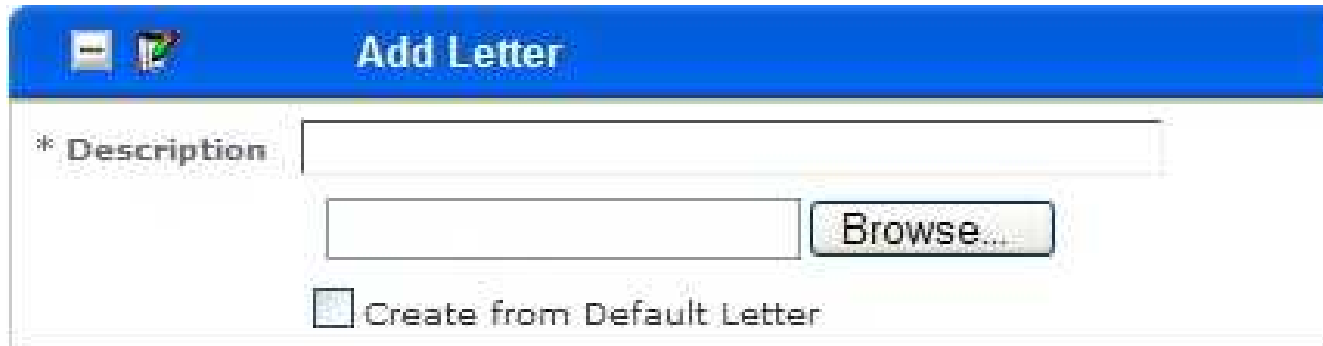


The screenshot shows a web interface titled "Follow-up Letter Templates". At the top, there is a blue header bar with the title. Below the header, there is a navigation bar with a document icon, a red 'X' icon, a search bar containing "1 of 1", a "2 Items" indicator, a "25 / Page" dropdown, and a "Go" button. The main content area is a table with the following columns: "Template", "File Name", and "Modify Date". Each row in the table has a checkbox, a document icon, a red 'X' icon, and a refresh icon to its left.

| | <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 Williams Washing Template

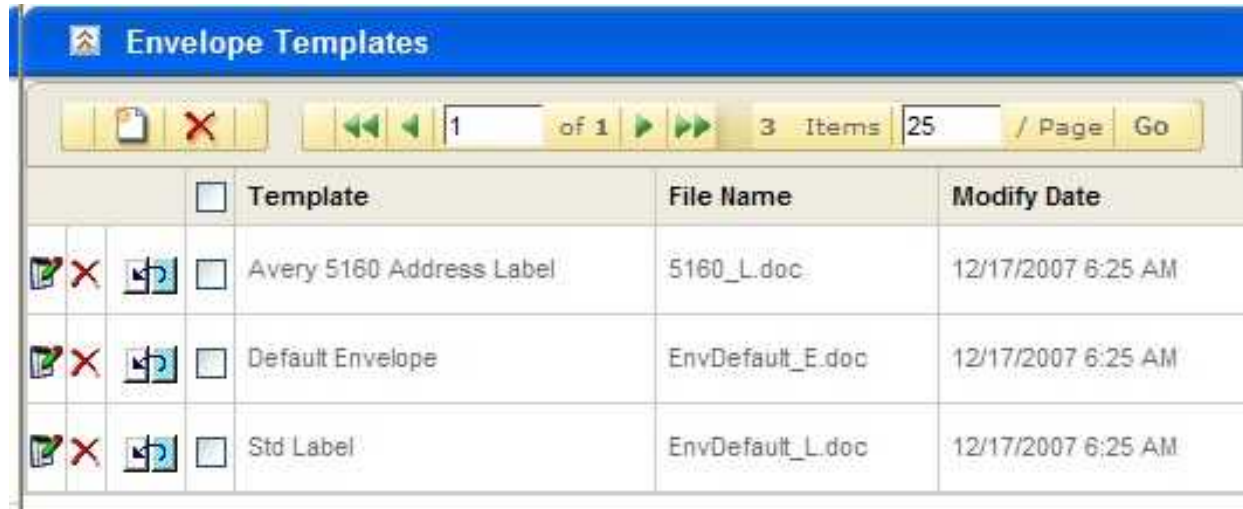
Edit Letter (To edit a Letter Template you must have Word installed on your station)

- 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 web application window titled "Envelope Templates". At the top, there is a blue header bar with the title. Below the header is a navigation bar with a document icon, a red 'X' icon, a left arrow, a right arrow, a text input field containing "1", the text "of 1", another left arrow, another right arrow, the text "3 Items", a text input field containing "25", the text "/ Page", and a "Go" button. Below the navigation bar is a table with the following columns: "Template", "File Name", and "Modify Date". The table contains three rows of data.

| | <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



Add Envelope / Label

* Description

Upload New (use Browse to locate)

Copy from Default Envelope

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



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 a web application window titled "Print Sessions". At the top, there is a search form with a "User" dropdown menu set to "All", two empty text boxes for "Session Date" (with "to" between them), and a "Go" button. Below the search form is a navigation bar with icons for delete, refresh, and undo, followed by page navigation controls showing "1 of 1" items and "54 Items" per page. The main content is a table with the following data:

| <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**