



ReposiTrak Essentials

A Webinar Series for Customers of ReposiTrak

[REPOSITRAK.COM](https://www.repositrak.com)

Today's Presenter:



Effective Management of Alerts & Notifications

Compliance & Risk Management

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Today's Learning Objectives...

Effective Management of Alerts & Notifications

- Review why alerts & notifications are an important function in compliance management
- Review the common valuable and optional alerts & notifications that can be used by different roles in an organization
- Demonstrate tips and tricks on how alerts & notifications are setup for corporate, facility, and item level



Why Are Alerts & Notifications Important?

Compliance Management



- Maintains compliance



- Maintains full transparency



- Speeds results



Common Alerts & Notifications

Compliance Management

Retailer/Wholesaler Customer

Status

- Supplier Compliance Status

Alerts

- Partner Prospect Cancel Request
- Document Exemption Request
- Document Review Pending
- Documents Failed Review

Exceptions

- Document Compliance Exceptions

Supplier/Vendor

Status

- Customer Compliance Status

Alert

- My Document Failed Review
- Vendor ID Changes
- Document Exemptions Request Reject



Tips and Tricks for Alerts & Notification Setups

Compliance Management

New! User Profile under

My Users combines

- My Contacts for Notifications
- My Contact Authorizations

The screenshot displays the ReposiTrak user interface. At the top, there is a dark blue navigation bar with links for 'Home', 'Compliance Center', 'My Company' (which is underlined), and 'My Partners'. Below this is a light blue breadcrumb trail: 'Business Unit Select > Application Selection > My Company'. The main content area is titled 'Setup/Manage' and contains a list of menu items: 'My Company Information', 'My Business Profile', 'My Facilities', 'Manage Facility Setup Requests from My Customer', 'My Users' (highlighted with a red box), 'My Password', 'My User Groups', 'My Contacts for Notifications', 'My Contact Authorizations', 'My Document Review Authorizations', 'My Messages', and 'My Calendar Events'. Two red arrows point from the 'My Users' box to the 'My Contacts for Notifications' and 'My Contact Authorizations' items.




Manage/Update the User Profile

My User Profile

- Roles
- Authorizations
- Notification

The screenshot displays a 'Users' management interface. At the top, there is a blue header with the word 'Users'. Below it is a table with columns: NAME, EMAIL ADDRESS, WORK PHONE NUMBER, SIGN UP ADMIN, and PROFILE COMPLETION. Two users are listed: Crawford, Joan and Davis, Betty. The row for Betty Davis is highlighted in yellow. To the right of the table, a dropdown menu is open, showing options under 'MANAGE/UPDATE' (Update User Profile, Update User, Update Roles, Update Authorizations, Update Notifications, Update Pictures, Reset Password for User) and 'AUTHORIZATIONS' (Manage Document Review Authorizations). Below the table, a detailed view for Betty Davis is shown, including a profile picture, a list of checked status items (User, Roles, Authorizations, Notifications, Pictures), and a 'User Details' section with input fields for First Name (Betty) and Last Name (Davis). Red arrows point from the 'Action' button in the table to the dropdown menu and from the dropdown menu to the detailed user profile view.

NAME	EMAIL ADDRESS	WORK PHONE NUMBER	SIGN UP ADMIN	PROFILE COMPLETION	Action
Crawford, Joan	ksickles@parkcitygroup.com	333-444-5555	No	80%	Action
 Davis, Betty	ksickles@parkcitygroup.com	777-333-5555	Yes	100%	Action

MANAGE/UPDATE

- Update User Profile
- Update User
- Update Roles
- Update Authorizations
- Update Notifications
- Update Pictures
- Reset Password for User

AUTHORIZATIONS

- Manage Document Review Authorizations

Davis, Betty

✔ User ✔ Roles ✔ Authorizations ✔ Notifications ✔ Pictures

User Details

First Name:

Last Name:

Notifications

My User

✔ User ✔ Roles ✔ Authorizations ✔ Notifications ✔ Pictures

[? Help for this Step](#)

Selection Criteria

- Choose Compliance Management

Application:

Please select Application ...

Type to search

Please select Application ...

- Item, Cost And Promotion
- Compliance Management

Cancel

Save

Save & Next



Notification Types






Alert | Exception | Status

Notification Types			
NOTIFICATION TYPE	IMMEDIATELY	WEEKLY	DAILY
<p>? ALERT Documents Failed Review <i>Alerts the customer when they fail a partner's submitted document</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>? EXCEPTION Document Compliance Exceptions <i>Two attached files indicate the status of all vendor document requirements</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<p>? STATUS Corporate Document Requirements for Suppliers <i>An attached file shows the corporate and facility level compliance status of document requirements of your suppliers</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Tip | Have a Question?

Notification Type

NOTIFICATION TYPE	IMMEDIATELY	WEEKLY	DAILY
 STATUS Corporate Document Requirements for Suppliers <i>An attached file shows the corporate and facility level compliance status of document requirements of your suppliers</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 STATUS Facility Compliance Status <i>An attached file shows the facility compliance status of all suppliers</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 STATUS Item Document Requirements for Suppliers <i>An attached file shows the item level compliance status of document requirements of</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 <div data-bbox="471 963 1719 1135" style="border: 1px solid green; background-color: #e0f0e0; padding: 5px; display: inline-block;">This attached spreadsheet summarizes your compliance status for corporate and facility documents required by your partners. Expect an email with the subject line: Your Compliance Status: Corporate & Facility Documents</div> <i>requirements</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 STATUS My Items' Document Requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Reserve your spot now!

Register using the link you'll receive in the follow-up from today's webinar

- JUL 30 Uploading Files, Using Templates and eSigning
- AUG 27 Getting the MOST from Automating Document Reviews
- SEP 24 Updating Profile Requests: Items & Facilities

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Questions? webinars@repositrak.com

