ReposiTrak Essentials

A Webinar Series for Customers of ReposiTrak

Effective Management of Alerts & Notifications

Compliance & Risk Management

Today's Presenter:

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Business Development Manager
ReposiTrak

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

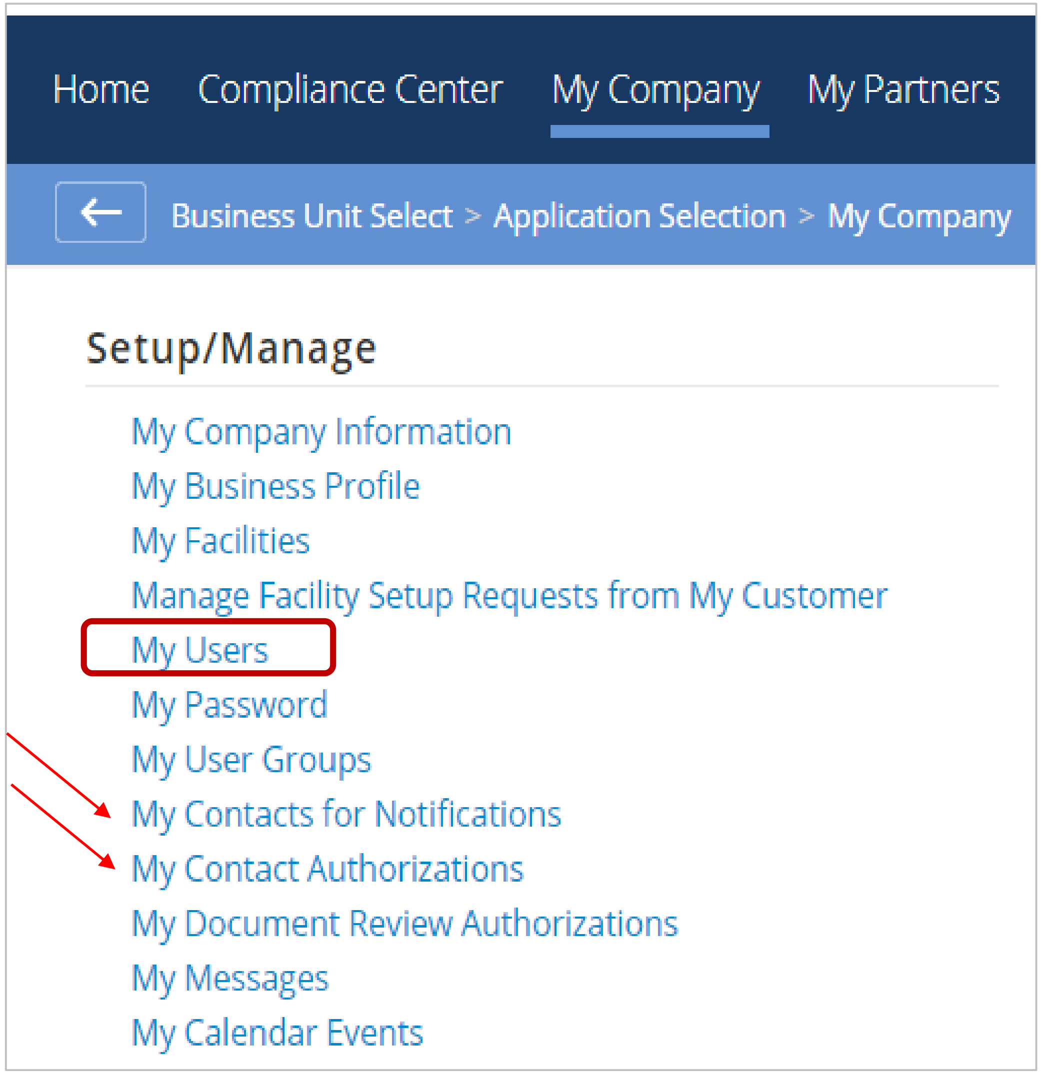
Tips and Tricks for Alerts & Notification Setups

Compliance Management

New! User Profile under

My Users combines

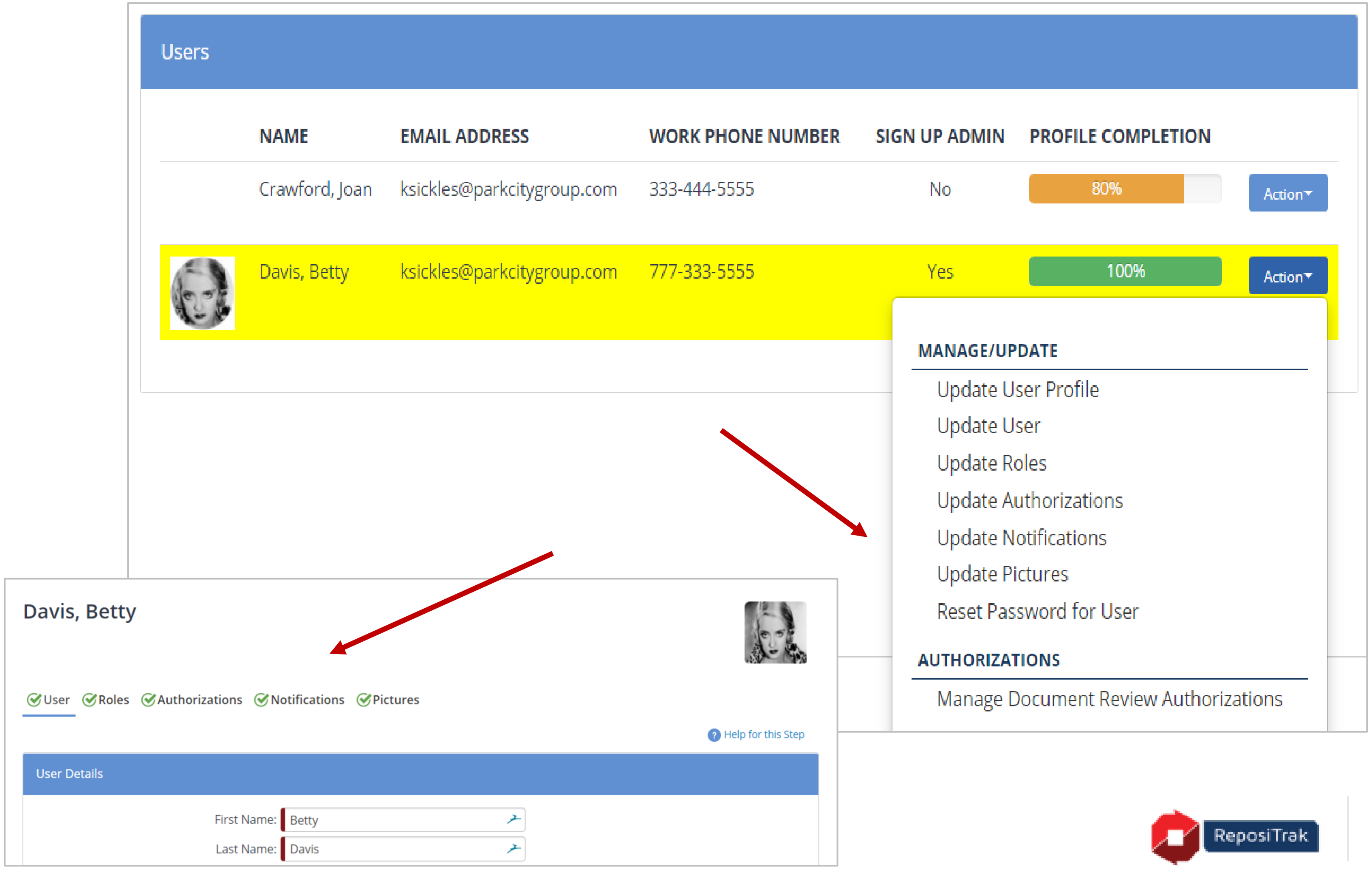
- My Contacts for Notifications
- My Contact Authorizations



Manage/Update the User Profile

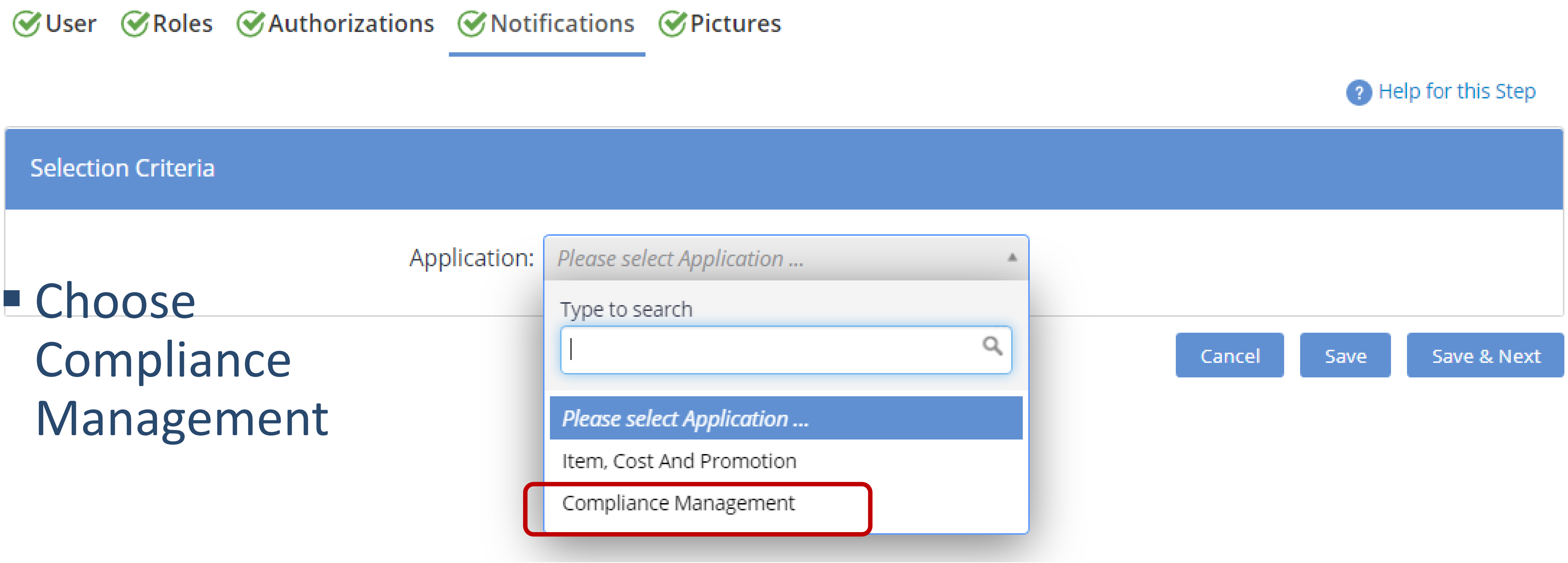
My User Profile

- Roles
- Authorizations
- Notification



Notifications

My User



- Choose Compliance Management

Notification Types

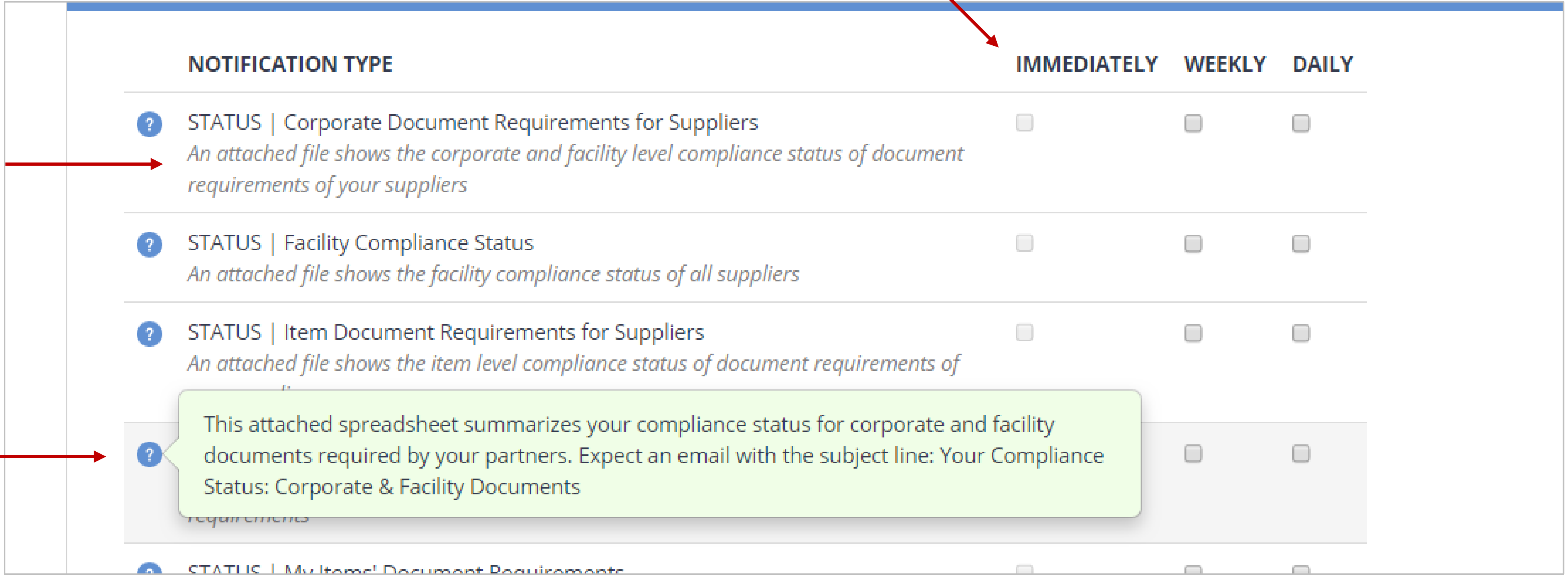
Alert | Exception | Status

Notification Types

	NOTIFICATION TYPE	IMMEDIATELY	WEEKLY	DAILY
?	ALERT | Documents Failed Review *Alerts the customer when they fail a partner's submitted document*	☐	☐	☐
?	EXCEPTION | Document Compliance Exceptions *Two attached files indicate the status of all vendor document requirements*	☐	☐	☑
?	STATUS | Corporate Document Requirements for Suppliers *An attached file shows the corporate and facility level compliance status of document requirements of your suppliers*	☐	☐	☐

Tip | Have a Question?

Notification Type



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