



Greenlight

COMPLIANCE SOLUTIONS

GREENLIGHT COMPLIANCE
RELEASE 20.0.0.0
DOCUMENTATION GUIDE

Version 2020.0.0.0

GREENLIGHT COMPLIANCE MANAGER

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Chapter 1: Bug Fixes

List of Bug Fixes and Minor Enhancements

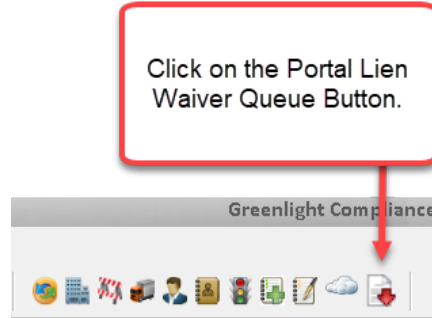
- 1) Filtered out closed jobs from Generate Lien Waivers Job Selection Screen. When generating Lien Waivers using the Mass Waiver Generator Tool, the Job Pull-Down list was displaying all Pending, Active, Completed Operations, and Closed Jobs. Greenlight will now only be showing Active Jobs from the Pull-Down Job menu.
- 2) Added additional parameters to restrict to active jobs for Accounting Insurance Update Job. Allows users to the Accounting Insurance Update Signal Job to only update All Operations and commitment insurance compliance tracking for commitments on Active Jobs.
- 3) Increase in Job Name field size. Users were receiving an error when the Job Description was over 100 characters. The Job Description field now allows for 200 characters.
- 4) Signal Service will clear out Log Files that are older than 72 hours, preventing memory loss when loading the Log Screen from a Signal Service Job.
- 5) Users can now filter out Vendors that have received a Final Waiver when creating Lien Waivers using the AP Invoice feature.
- 6) Added NA (Not Applicable) to Insurance Ratings if the User needs to turn off the rating tracking for individual Insurance Templates.
- 7) Fixed Error when Importing Contacts from Accounting System.
- 8) Fixed issues with Compliance Checking Service for All Operations Vendors.

Chapter 2: Major Application Enhancements

Lien Waiver Portal Queue

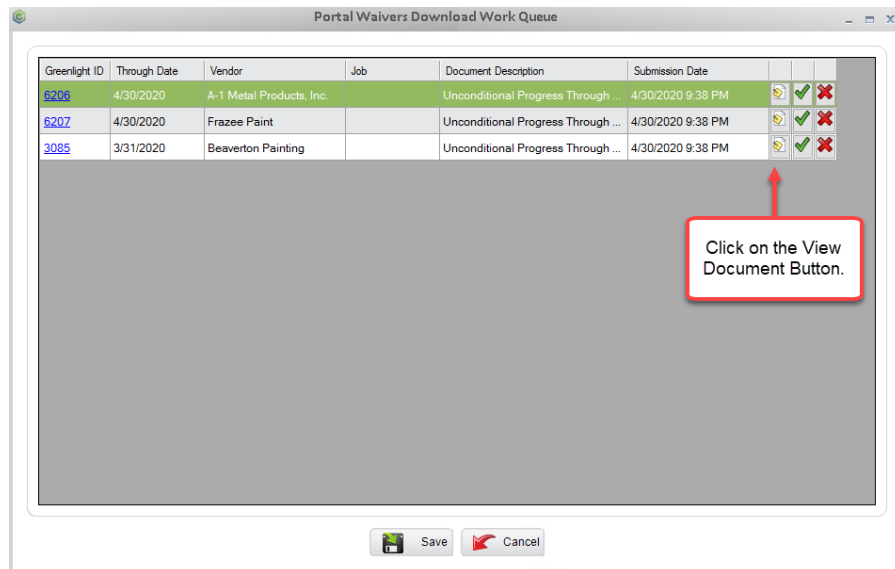
The Portal Lien Waiver Work Queue allows users to view any Lien Waivers that were either Electronically Signed or uploaded through the Vendor Portal. This allows users to quickly view and verify the waiver document before accepting the document and received date within the Greenlight Application. If the Waiver was not properly uploaded, missing a signature or they used the incorrect form, the users can decline the documents and reset the Lien Waiver Record for the Vendor to sign or upload.

- 1) After a Vendor has uploaded/signed a Lien Waiver Form via the Vendor Portal, the Greenlight Application will sync the data and the Lien Waiver Document into the Application.
- 2) Click on the **Portal Lien Waiver Work Queue Button** located at the top of the screen.

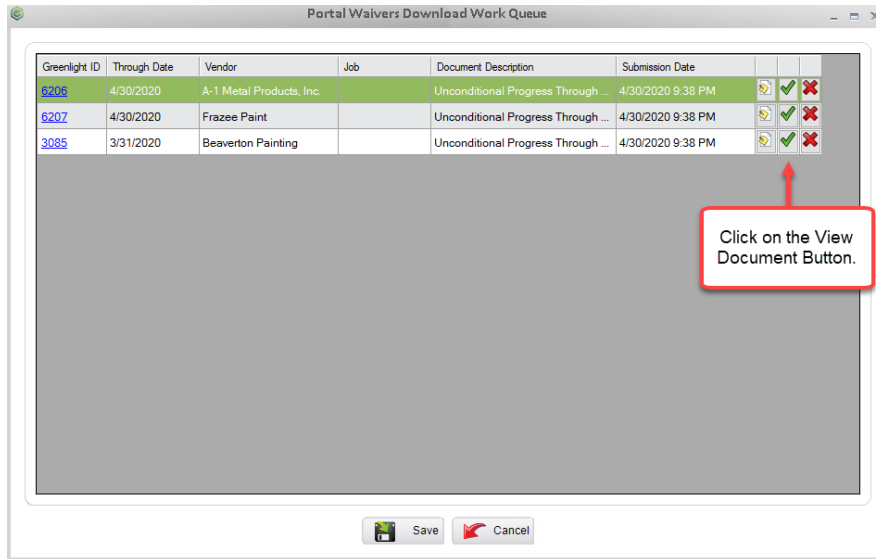


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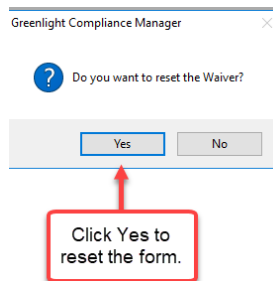
- 3) The Portal Lien Waiver Grid will display any new Waivers that have been uploaded/signed in the Vendor Portal. The Grid will contain a link that the User can click on that will direct them to the Vendor Record in the Application. The Grid will also display the Vendor Name, Job, Waiver Type, and the Submission date.
- 4) Click on the **Document View Button** to review the Lien Waiver document.



- 5) If the Lien Waiver document is correct and there are no issues, then click on the **Green Checkmark Button**. If you click on the button, the Application will accept the document and data. The Waiver Record will be removed from the Lien Waiver Portal Queue.



- 6) If the Vendor uploaded an incomplete document or the wrong form, users can reset the Waiver Record by clicking on the **Red X Button**. The Application will ask you if you would like to reset the form. Resetting the form allows the Waiver Record to reopen on the Vendor Portal so your Vendor can upload the correct form. If you click the No Button, the record will be removed from the Greenlight Application and the Vendor Portal.



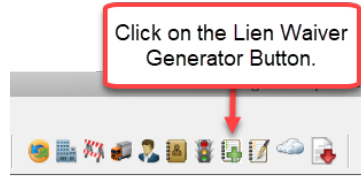
Lien Waiver AP Invoice Reset

The Lien Waiver AP Invoice Import feature allows users to import invoices and check data from their Accounting Software to create waivers. Once the check and invoice data has been used to generate a Waiver Record, the Application will store the data and prevent the same check/invoice data from populating in future AP Invoice imports. If you need to reset the check/invoice data, you can use the Invoice Reset feature to reset any used check data for future use. This section will review how to manage imported Lien Waiver Invoice data from the Accounting System.

- 1) Once a user has generated a Waiver Record using AP Invoice/Check data imported from the Accounting System, the Application will store that data so the Invoice/Check data will not appear

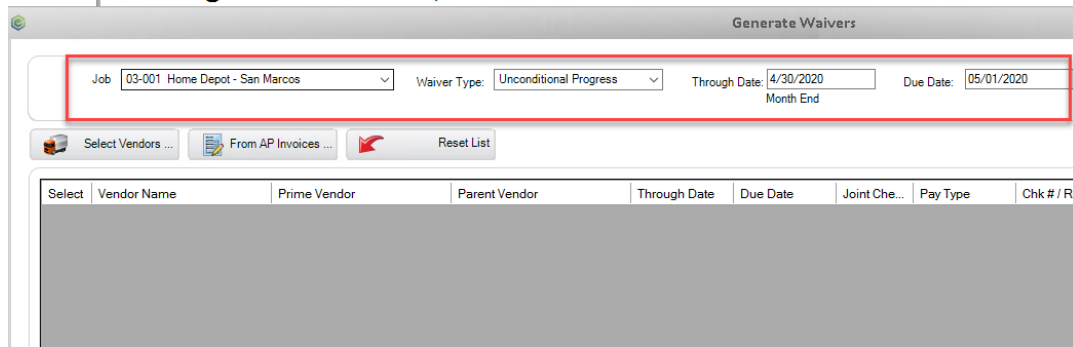
again on a future import using the same date range. If you need to generate a waiver using previously imported data, then you can reset the AP/Invoice/Check data.

- 2) Click on the **Lien Waiver Generator Button** located at the top of the screen.

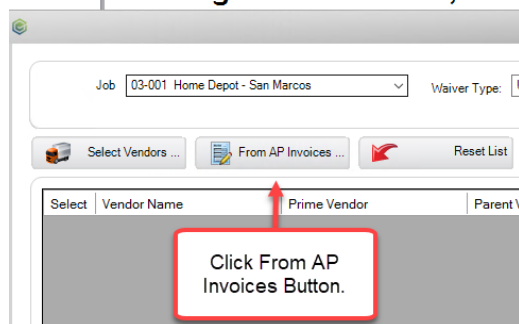


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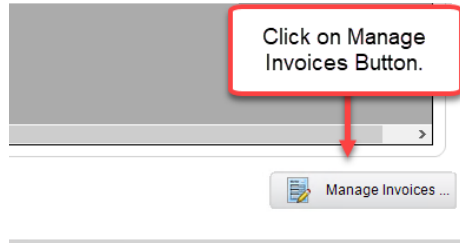
- 3) Select the **Job, Waiver Type, Through Date and Due Date** for the Waiver you want to Generate.



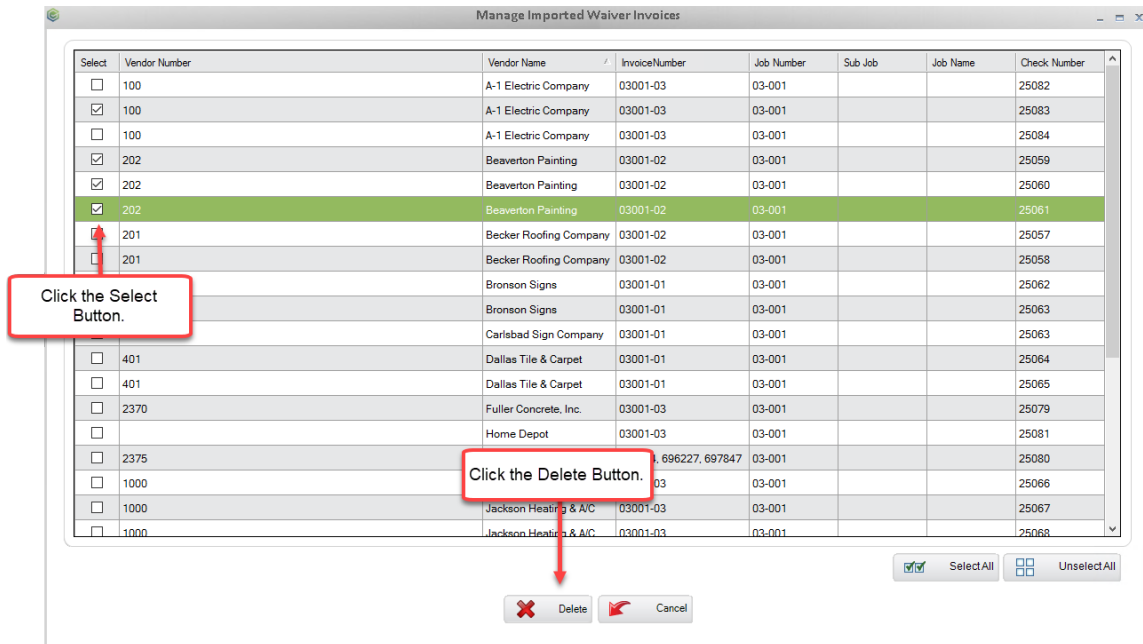
- 4) Click on the **From AP Invoices Button**.



- 5) Click the **Manage Invoice Button** in the lower right corner.



- 6) Click the **Select Button** next to the Check/Invoice record(s) that you would like to reset. Click the **Delete Button** when done to reset the records.

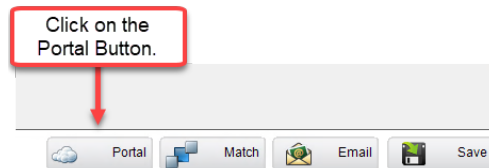


- 7) The check and invoice data will now be available when importing data from the Accounting System.

Portal Lien Waiver and Insurance Access Codes

Insurance and Lien Waiver Portal Access Codes are designed to allow Vendors to access the Portal without having to register an account. The Access Codes will enable a Vendor only to **upload insurance and lien waiver documents**. If you want the Vendor to update their Insurance Data or Electronically Sign Waivers, then they will need to create a Portal User Account to verify their identity. The Access Codes were created to help streamline Vendors with uploading insurance certificates and signed lien waivers through their Vendor Portal. Vendors will still be able to upload signed lien waivers for any of their suppliers/tiers vendors when using the Lien Waiver Access Code. This section will review how to Generate and insert Access Codes in the Email Template.

- 1) Click on a **Vendor Record** from the **Navigation Tree** or use the **Master Address Book**.
- 2) Click on the Portal Button.



- 3) Click on the **Generate Button** next to either the Lien Waiver or Insurance Fields. You can regenerate access code if needed.



- 4) If you want to copy the codes and paste them in an email, you can click on the **Copy Codes Button**.
- 5) Once you have generated the Vendor Portal Codes, you can merge the codes into any compliance email template. Click on the **Email Templates** from the **Administration Menu**.
- 6) Select an existing Email Template or create a new one. To add the Code(s), **right-click the mouse** of the part of the email you want to merge the Code. **Select <<Vendor Portal Insurance Code>> or <<Vendor Portal Lien Waiver Code>>** from the list.

Email Template Administration

Configuration

Template: Insurance Compliance Issues - Jobs Sender: Type: General

Recipients:

Role	Type	Send
Administrator	J	N/A
Contract Admin...	V	N/A
Insurance Adm...	J	N/A
Insurance Adm...	V	To
Insurance Agent	V	Cc
Lien Waiver...		
Lien Waiver...		

Documents:

Description	Company	Job	Vendor
Insurance Requirements - Default Jobs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Reports:

Right-click over the part of the email that you want to merge the Code. Select the Code you want from the Merge Field List.

Body:

We have reviewed your insurance certificate for the above referenced job and not...
 Please upload your certificate using the Vendor Portal. Your insurance access code is...
 Please review the attachments for the specific details that need your attention.

Enter the default body text for the email (Right-Click to insert data placeholders)

Date	Time	Author	Subject
1/18/2020	10:22 AM	Bruce Evenrud	Checked the state board web site and their license has been renewed.
1/17/2020	2:17 PM	Bruce Evenrud	Jessica called and said that their license was renewed on time. She said th
1/17/2020	1:12 PM	Bruce Evenrud	To: Jessica Robinson Subject: A-1 Electric Company - IMPORTANT - You
1/8/2020	1:27 PM	Bruce Evenrud	To: Rob Carlton Subject: A-1 Electric Company - IMPORTANT - Required I

7) When the automated or manual Compliance Emails are sent to the vendors, the Portal Access Code for that Vendor will now be in the body of the email, allowing them to paste the Code on the Portal Access Code login screen.

Attachments:

Type	Document Name

Documents

Attach File

Message:

Thank you for your prompt attention to resolve your insurance requirements for the above referenced job.

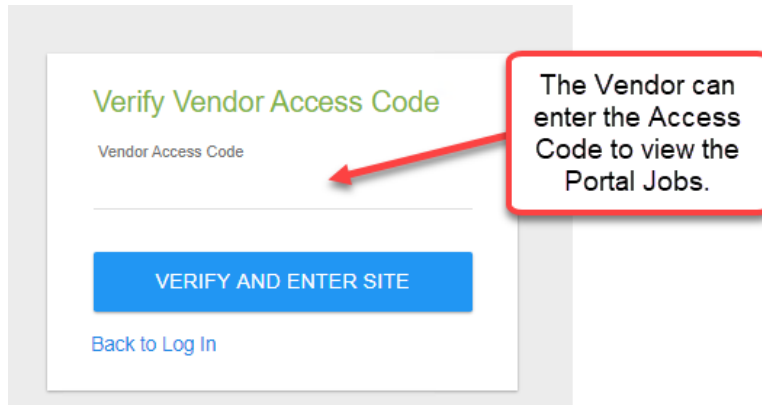
Please upload your insurance document using your <https://app-gl-compliance.com/Account/Login?Ref=...> following access code:

Access Code: 7517113

The Vendors Code is automatically added to the email.

Send Cancel

Information Changed 4/27/2020 4:11 PM Tanner.Jackson The following changes were made to the insurance for this vendor: Pollution Not Applicable Set



- 8) You can also create a hyperlink within the Email Template that will allow the portal user to access their Jobs Portal without having to enter an access code from the Access Code login screen. Copy and paste the following hyperlinks into the email template to create an active hyperlink for your Vendor to click on.

Insurance Hyperlink:

<https://app.gl-compliance.com/VendorAccessCode/CompanyJobVendorComplianceTreeView?vendorAccessCode=<Vendor Portal Insurance Access Code>>

Lien Waiver Hyperlink:

<https://app.gl-compliance.com/VendorAccessCode/CompanyJobVendorComplianceTreeView?vendorAccessCode=<Vendor Portal Lien Waiver Access Code>>

Subject:

<<VendorName>> Your Insurance On File Is About To Expire

Body:

This is a friendly reminder that your insurance that we have on record is about to expire. Please use our Subcontractor Portal to upload your Certificate of Insurance and Endorsements a
 Please review the attached report and COI examples for more detail. Please use our Subcontractor Portal to upload your Certificate of Insurance and Endorsements.
<https://app.gl-compliance.com/VendorAccessCode/CompanyJobVendorComplianceTreeView?vendorAccessCode=<<Vendor Portal Insurance Access Code>>>
 It is important that we get your insurance in compliance to make sure we can process your payments on time. Thank you and if you have any questions please email our insurance administrator below.
 We will no longer be accepting insurance certificates via email or mail, we will be using a new vendor portal to help organize our vendor's insurance. Please submit your COI using the Greenlight Vendor Portal.
 Note: Please make sure to include your Endorsement Forms with your Certificate Of Insurance.



Your vendor will be able to click on the hyperlink and they will be able to access the their Vendor Portal.

This is a friendly reminder that your Certificate of Insurance and Endorsements on record is about to expire. Please use our Subcontractor Portal to upload your Certificate of Insurance and Endorsements.

Please review the attached report and COI examples for more detail. Please use our Subcontractor Portal to upload your Certificate of Insurance and Endorsements.

<https://app.gl-compliance.com/VendorAccessCode/CompanyJobVendorComplianceTreeView?vendorAccessCode=7575992>

It is important that we get your insurance in compliance to make sure we can process your payments on time. Thank you and if you have any questions please email our insurance administrator below.

We will no longer be accepting insurance certificates via email or mail, we will be using a new vendor portal to help organize our vendor's insurance. Please submit your COI using the Greenlight Vendor Portal.

Note: Please make sure to include your Endorsement Forms with your Certificate Of Insurance.