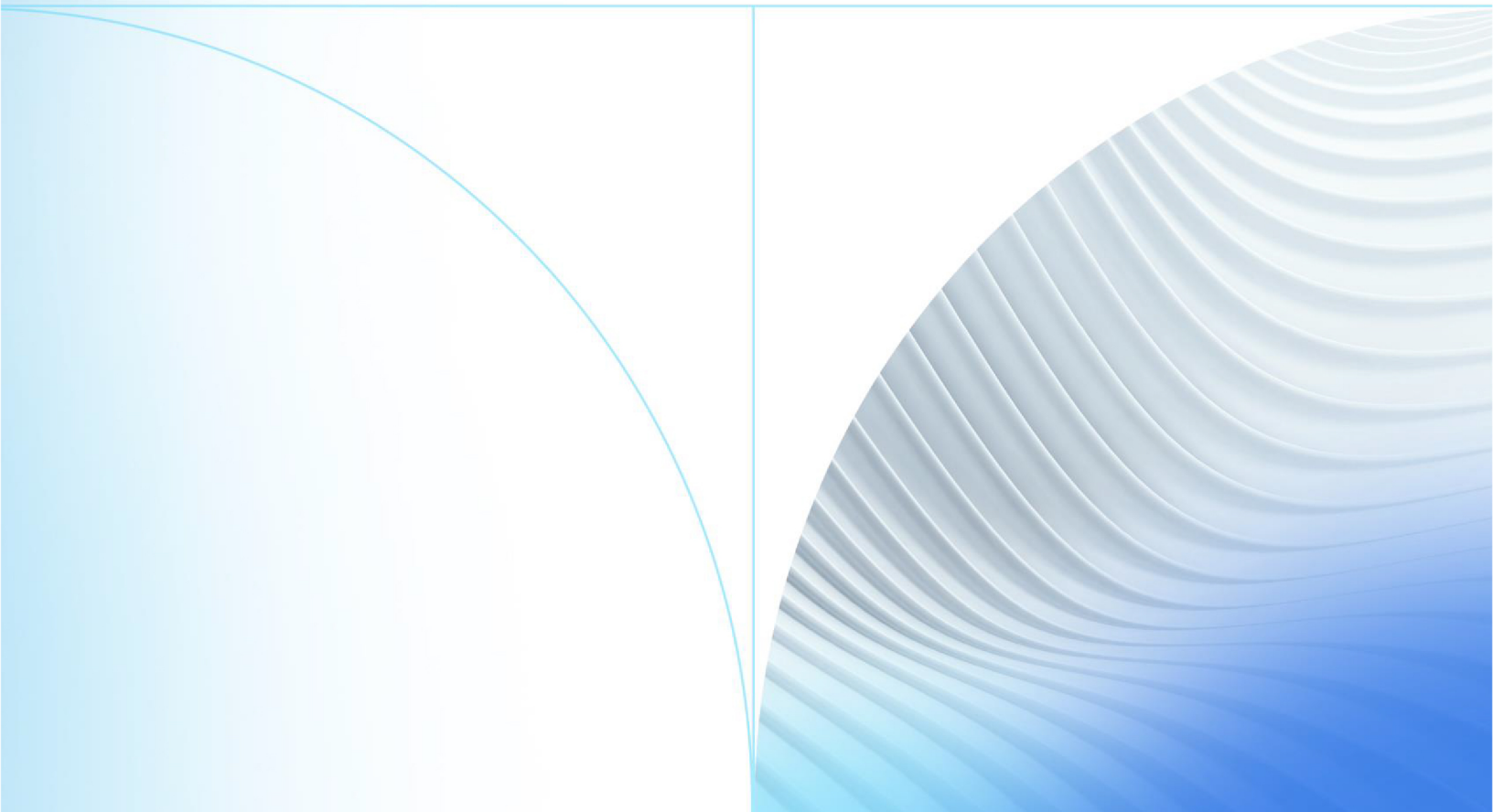




FactorSoft™

• Release v4.7

# SaferWatch™ User Guide



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### **Limitations on Maintenance Services**

The FactorSoft™ application is intended for use in accordance with the standards and processes described within this documentation. Efforts to investigate and/or repair FactorSoft™ application or data integrity issues caused by activities or integrations outside of the intended use of the FactorSoft™ platform will be subject to the then-current Jack Henry Professional Services billable hourly rate.

Standard Maintenance Services (Technical Support) does not include the following:

Investigation and Remediation of errors and data integrity issues caused, contributed to, or by any of the following:

- a software program that was not originally provided by Jack Henry
  - third-party automation, BOT/Screen Scraping technology, custom importers, or any other integration with FactorSoft™ that was not created by or in conjunction with Jack Henry.
- any modification not provided by Jack Henry to the software or standard database schema
  - the addition of custom database elements including triggers, stored procedures, tables, and columns
  - the alteration of standard FactorSoft™ triggers, tables, columns, stored procedures and indexes
  - the execution of T-SQL scripts resulting in changes to the data stored within the FactorSoft™ database
- equipment, software, networks or any other infrastructure in the customer's environment that does not meet the minimum requirements described within the then-current FactorSoft™ product documentation

Please note that if you are exploring possibilities with third-party software providers or considering altering the FactorSoft database in any way, it is strongly recommended that you discuss your plans with the FactorSoft™ support team before making any commitments or changes. As your software partner, we may be able to help solve your business problem in a way that does not introduce risk, data corruption, or system instability.

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## Motor Carrier/DOT# Reports and Alerts

ProfitStars® has implemented motor carrier and/or DOT number monitoring through an integration with Truckstop.com's SaferWatch™ Carrier Qualification and Monitoring service for validation of carriers by Motor Carrier and/or DOT numbers directly from FactorSoft. This interface also offers critical alert updating in the Monitor Alerts screen in FactorSoft.

When this enhancement is activated with ProfitStars® and in the FactorSoft control file, all of the Motor Carrier and DOT# information recorded in FactorSoft for clients, debtors, and carriers is exported to SaferWatch for monitoring. In addition, critical information updates for monitored carriers are displayed on the Monitor Alerts screen for you to view.

## Motor Carrier Monitoring Setup

Activation of Motor Carrier Monitoring requires a SaferWatch account. Please contact your Truckstop.com sales representative, and be sure to mention that you will be adding SaferWatch to your FactorSoft FactorSoft. Once your SaferWatch account is active, SaferWatch provides you with a unique Customer Key, which you then need to provide to ProfitStars® to complete the activation in FactorSoft. Please contact ProfitStars® at 205-972-8900, option 2 for further details.

Once activated, you will be provided with a SaferWatch Customer Key. The only FactorSoft set up requirement is entering your SaferWatch Customer Key in System Preference **Identification/system constants, Interface parameters, SaferWatch Web Services, Customer key.**

## Set Up Motor Carrier Services

Service templates must be configured and tasks configured in the Engine to enable the communications for the Motor Carrier Monitoring communications.

The Motor Carrier Monitoring services are scheduled using the Schedule Task Processor option accessed from the Administration module's System menu. To schedule the service, create a name for the template in the **Service template** field, select the service (see below) on the Parameters tab, and save the template. Then, update the Scheduling tab to run the service at the desired intervals and save the template.

### NOTE

For more information on the Scheduling tab, refer to the Reports Guide.

In addition, when defining SaferWatch templates, it is recommended that the SaferWatch Upload is scheduled to process at 2:00 PM, daily. It is recommended that the SaferWatch Alerts template is scheduled to process hourly, beginning at 8:00 AM.

The two services must be configured to enable the communication between FactorSoft and SaferWatch:

Service	Description
SaferWatch Upload	Sends motor carrier number information from FactorSoft to SaferWatch for monitoring of individual motor carrier numbers.
SaferWatch Alerts	Polls SaferWatch for critical alert updates and pulls them into the Monitor Alerts screen in FactorSoft.

## Set Up Engine Tasks

Two Engine tasks must be enabled for Motor Carrier Monitoring:

- **SaferWatch ContirbuteNew** - enables sharing of Motor Carrier and DOT# information held in FactorSoft with SaferWatch
- **SaferWatch Alerts** - enables update of motor carrier/DOT# critical information alerts

Refer to the Engine Administrator's Guide for details on enabling Task Types in the Engine.

## Set Up Alert Triggers in SaferWatch

SaferWatch will provide concise daily alerts of changes that matter conveniently delivered via the Monitor Alerts screen in your FactorSoft. These built-in Alerts are automatic and have been pre-configured specifically for this interface.

To customize alert triggers from SaferWatch:

1. Login to the SaferWatch Dashboard using your account credentials.

The screenshot shows the SaferWatch dashboard interface. At the top, there is a navigation bar with tabs for Dashboard, Search, Risk Management, Alerts, and Reports. Below this is a sub-navigation bar with Main and Help Center. The main content area features a 'Welcome to' message, the SaferWatch logo, and user information for Ms. Kathy (PO 515, Hebron, ND 58638). A prominent advertisement for CarrierLists ONLINE is displayed, stating 'CarrierLists sources the carriers. You move the freight.' and offering a 'Start Your Free Trial'. Below the advertisement are two main data sections: 'Interstate Carrier Risk Management' and 'SaferWatch Assure - Certificates Of Insurance'. The first section includes a table for the Interstate Watchlist (17879 total) and a pie chart showing 89.4% Unacceptable. The second section shows the Current Status with a table and a pie chart.

Category	Number	Percent
Acceptable	782	4.4%
Moderate	1111	6.2%
Unacceptable	15986	89.4%

As of: April 30, 2020, 3:23 pm CT

Today's Changes: 783 View

Full Watched Carrier Assessment

Category	Number	Percent
On File	11363	64%
Load Waiting	0	0%
Pre-Qualify	6163	34%
Non Cooperative	353	2%

2. Select the Alerts tab, then Email Settings.

This screenshot shows the SaferWatch Alerts tab selected in the navigation bar. Below the Alerts tab, the 'Email Settings' option is highlighted in the sub-navigation bar.

3. From the section **Where Do You Want To Receive Your Alerts?**, edit your email list.

**TIP**

Since critical carrier information alerts are automatically returned to the Monitor Alerts screen in FactorSoft, you may find it redundant to receive these alerts in an email. You are able to control the email addresses to whom the alert emails are sent. Add or remove email addresses and click Update Email List.



Where Do You Want To Receive Your Alerts?

Email 1	<input type="text" value="testuser@saferwatch.com"/>
Email 2	<input type="text"/>
Email 3	<input type="text"/>
Email 4	<input type="text"/>
Email 5	<input type="text"/>

4. SaferWatch will provide concise daily alerts of changes that matter conveniently delivered via the Monitor Alerts screen in your FactorSoft. These built-in Alerts are automatic and have been pre-configured specifically for this interface. The complete list of changes you may receive in your Alerts follows.

**a. Authority Fields:**

Authority Grant Date, Common Authority, Common Authority Pending Application, Common Authority Pending Revocation, Contract Authority, Contract Authority Pending Application, Contract Authority Pending Revocation, Broker Authority, Broker Authority Pending Application, Broker Authority Pending Revocation, Authorized for Freight, Passenger, Household Goods, Private or Enterprise

**b. Rating Fields:**

Safety Rating, Rating Date, Review Type, Review Date, Review Document Number, Review Miles, MCS-150 Date, MCS-150 Mileage Year, MCS-150 Mileage, Accident Rate Percentile, Accident Rate Preventable Percentile, DOT Add Date

**c. FMCSA Insurance Fields:**

BIPD Required Amount, BIPD On File Amount, Cargo Required, Cargo On File, Bond Surety Required, Bond Surety On File

**d. FMCSA Insurance Policy changes:**

All Adds, Changes, or Cancellations

**e. Company Fields:**

Legal Name, DBA Name, Business Address, Business City, Business State, Business Zip Code, Business Country, Business Colonia, Business Phone, Business Fax, Business Latitude, Business Longitude, Mailing Address, Mailing City, Mailing State, Mailing Zip Code, Mailing Country, Mailing Colonia, Mailing Phone, Mailing Fax, Undeliverable Mail, Company Representative 1, Company Representative 2, Cell Phone, Email Address, Dun & Bradstreet Number, Organization Type

**f. CSA Fields:**

Unsafe Driver Percentile, Unsafe Driver Over Threshold, Unsafe Driver Severe Violation, Unsafe Driver Alert, HOS Percentile, HOS Over Threshold, HOS Severe Violation, HOS Alert, Driver Fitness Percentile, Driver Fitness Over Threshold, Driver Fitness Severe Violation, Driver Fitness Alert, Controlled Substance Percentile, Controlled Substance Over Threshold, Controlled Substance Severe Violation, Controlled Substance Alert, Vehicle Maintenance Percentile, Vehicle Maintenance Over Threshold, Vehicle Maintenance Severe Violation, Vehicle Maintenance Alert

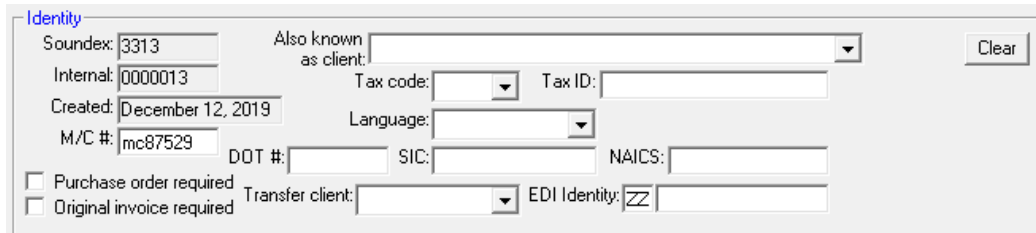
**g. Operation Fields:**

Entity Carrier, Entity Shipper, Entity Broker, Entity Freight Forwarder, Entity Cargo Tank, Operating Status, Carrier Operation, Shipper Operation, Out of Service, Out of Service Date, Out of Service Reason, Class Authorized For Hire, Class Migrant, Class Indian Nation, Class Exempt For Hire, Class US Mail, Class Private Property, Class Federal Government, Class Private Passenger Business, Class State Government, Class Private Passenger Non Business, Class Local Government, Class Other

## Accessing the Motor Carrier Reports

When the SaferWatch Customer Key is configured in System Preferences, the Motor Carrier Number and DOT# field labels on the Identity panels of the Client Information and Debtor Information screens, and Create New/Modify Existing Carrier screen are displayed below.

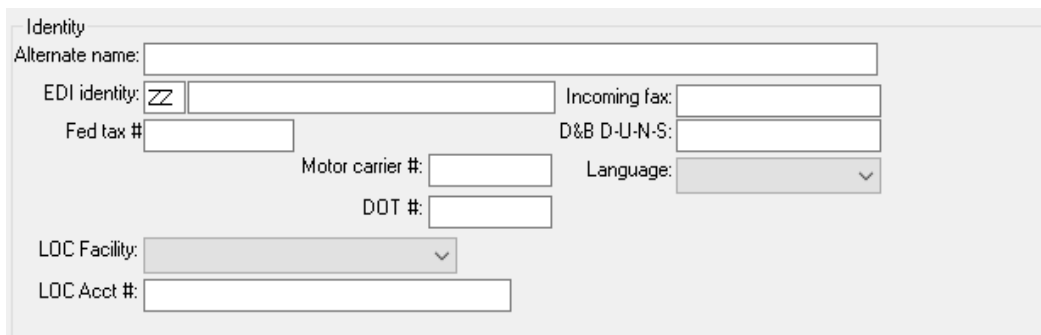
Identity panel of the Debtor Information screen:



The screenshot shows the 'Identity' panel of the Debtor Information screen. It contains the following fields and controls:

- Soundex: 3313
- Internal: 0000013
- Created: December 12, 2019
- M/C #: mc87529
- Also known as client: (dropdown menu)
- Tax code: (dropdown menu)
- Tax ID: (text field)
- Language: (dropdown menu)
- DOT #: (text field)
- SIC: (text field)
- NAICS: (text field)
- Transfer client: (dropdown menu)
- EDI Identity: ZZ (text field)
- Checkboxes:  Purchase order required,  Original invoice required
- Clear button

Identify panel of the Client Information screen:



The screenshot shows the 'Identify' panel of the Client Information screen. It contains the following fields and controls:

- Alternate name: (text field)
- EDI identity: ZZ (text field)
- Fed tax #: (text field)
- Motor carrier #: (text field)
- DOT #: (text field)
- LOC Facility: (dropdown menu)
- LOC Acct #: (text field)
- Incoming fax: (text field)
- D&B D-U-N-S: (text field)
- Language: (dropdown menu)

Modify Existing Carrier screen:

**Modify Existing Carrier**

Name / Address | Bank Relationship | Inter Bank | Payments

Carrier #: CARRIER1  Use as hauler

Name: Carrier 1

Address: 123 main street

City, state, zip: Hueytown AL 35555

Phone: (205)555-1234

Fax: (201)597-2899

Email: jamidavis@profitstars.com

Notes:

MC#: DOT#: Driver:

Modify Apply Exit Audit Help

Clicking the label for a field that has a number assigned immediately opens the SaferWatch Carrier Analysis report in a separate Internet browser window. This report provides a wealth of information about the carrier, including current status, insurance, bond, authorization and contact information to aid you in making an informed lending decision. The Carrier Analysis Report is illustrated below:



Using SaferWatch.com to stay informed and up-to-date about carriers is a smart thing to do. If you have any questions about your account, our Customer Service team is available Monday through Friday from 8:00am to 5:00pm Central Time at (701) 878-9700.

Thank you for choosing SaferWatch.com. You can count on us to be a safe partner when it comes to watching your carrier information.

Legal Name / DBA..... MAWS, INC. /  
 Docket #..... MC990076  
 US DOT #..... 993529  
 Status.....ACTIVE  
 Entity Type.....Carrier

**Docket Information On File**

Registered Business Address:  
 1800 OLD LINE HWY  
 LANGHORNE PA 19047 US  
 Phone.....555-590-1100  
 Fax.....

**Current Status**

Authority				Insurance			Cargo Authorization	
Authority	Status	Application Pending	Revocation Pending	Insurance Type	Required	Filed	Freight	Yes
Common	Active	No	No	BIPD	750,000	750,000	Passenger	No
Contract	Active	No	No	HHG Cargo	No	Yes	HHG	No
Broker	Active	No	No	Bond	Yes	Yes	Private	No
							Enterprise	No

**FMCSA Active Insurance** (Note: For cargo insurance verification, contact carrier directly for insurance agent and policy information):

FINANCIAL, INC. CLAIMS DEPARTMENT 12707 HUFF DR. SAN DIEGO CA 92130 Phone: 5555552615 Fax: 5552092610 AM Best Rating / ID: /	Insurance Type: TRUST FUND Form Code: 85 Policy Number: NONE Effective Date: 04/10/2009 Max Limit: 10,000 Class:
INSURANCE COMPANY CLAIM HELP P. O. BOX 4440 PEORIA IL 23961 Phone: 5554440406 Fax: 5556926796 AM Best Rating / ID: A+ / 4210	Insurance Type: BIPD Form Code: 91X Policy Number: 1555001214-3 Effective Date: 05/05/2007 Max Limit: 750,000 Class: P
HART FIRE INSURANCE COMPANY PLEASE CONTACT YOUR LOCAL AGENT ONE HART PLAZA HARTFORD CT 06115 Phone: 5555475000 Fax: AM Best Rating / ID: A / 2231	Insurance Type: CARGO Form Code: 34 Policy Number: 39 U 555 TT0329 Effective Date: 12/15/2004 Max Limit: 5,000 Class:

**US Dot Information On File**

Legal Name: MAWS INC  
 Entity Types: Carrier  
 Date Added: 1974-06-01  
 DUNS #: 9999441  
 Address: 1800 OLD LINE HWY  
 LANGHORNE PA 19047 US

Safety Rating: Satisfactory

Operations:



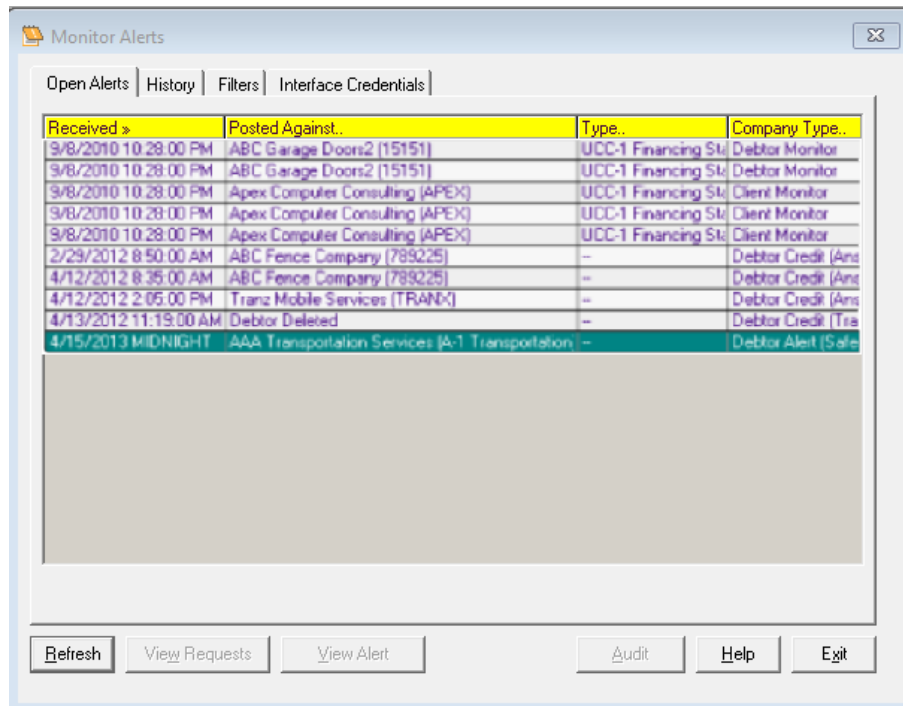
## Motor Carrier Alerts

Critical information updates for monitored carriers are displayed on the Monitor Alerts screen for you to view.

### TIP

To access open alerts on the Monitor Alerts screen, select Notes → Alerts.

When you select the alert from the list and click **View Alert**.



The Carrier Information Update report is opened in a separate Internet browser window:

**CARRIER INFORMATION UPDATE**



Using SaferWatch.com to stay informed and up-to-date about carriers is a smart thing to do. If you have any questions about your account, our Customer Service team is available Monday through Friday from 8:00am to 5:00pm Central Time at (701) 878-9700.

Thank you for choosing SaferWatch.com. You can count on us to be a safe partner when it comes to watching your carrier information.

Carrier Name.....AAA Transportation Services (A-1 Transportation)  
 Docket #..... 371118  
 US DOT #..... 2225699  
 Date.....2013 / 04 / 15

Metric: INSP_TOTAL	Previous Value:	New Value:
	101	102

\*\*\*\*\*

Metric: DRIVER_INSP_TOTAL	Previous Value:	New Value:
	101	102

\*\*\*\*\*

Metric: UNSAFE_DRIV_PCT	Previous Value:	New Value:
	86.8	85

\*\*\*\*\*

Metric: FATIGUE_DRIV_PCT	Previous Value:	New Value:
	88.8	89.8

\*\*\*\*\*

Metric: VEH_MAINT_PCT	Previous Value:	New Value:
	57.6	57.5

\*\*\*\*\*

