



Contract Comply

Vendor Vetting Release Notes
(Lender/Forwarder)

November 2017

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Vendor Vetting Report



From the Main Menu in Contract Comply, select **Reports > Vendor Vetting Report**

The **Vendor Vetting Report** interface will display and will be blank by default. Select a Forwarder from the dropdown (if your company is a Forwarder type, there will be no selection dropdown), and all of your vendors will populate in the grid by default. For the Lender company type, once the selection is made, the **Vendor Vetting** grid will populate with all related companies and their vetting data.

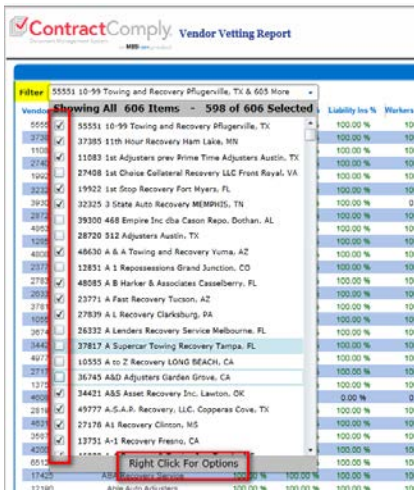
Lender Company type view.

Vendor ID	Vendor Name	Bus. License %	Auto Lic %	Liability %	Workers Comp %	Vehicle at Risk %	Cost of Good Standing %	W9 %	Background Check %	Vendor Affid %	Questionnaire Sent	Questionnaire Completed	Background Sent	Background Completed	Background Status	Background Exception	Required Business License	Business License
97889	180 West Recovery	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125640	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125641	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125642	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125643	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125644	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125645	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125646	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125647	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125648	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125649	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125650	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0

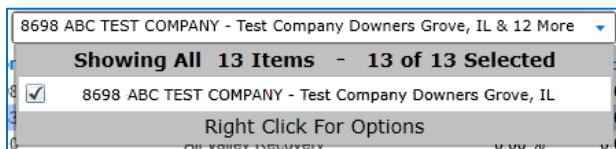
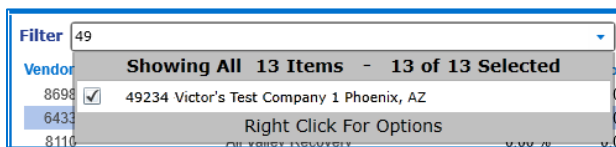
Forwarder company type view

Vendor ID	Vendor Name	Bus. License %	Auto Lic %	Liability %	Workers Comp %	Vehicle at Risk %	Cost of Good Standing %	W9 %	Background Check %	Vendor Affid %	Questionnaire Sent	Questionnaire Completed	Background Sent	Background Completed	Background Status	Background Exception	Required Business License	Business License
97889	180 West Recovery	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125640	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125641	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125642	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125643	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125644	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125645	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125646	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125647	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125648	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125649	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0
125650	160 Choice Outgoing Recovery LLC	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	8/30/2017	8/30/2017	8/30/2017	8/30/2017	10/10/17	Clear	0	0

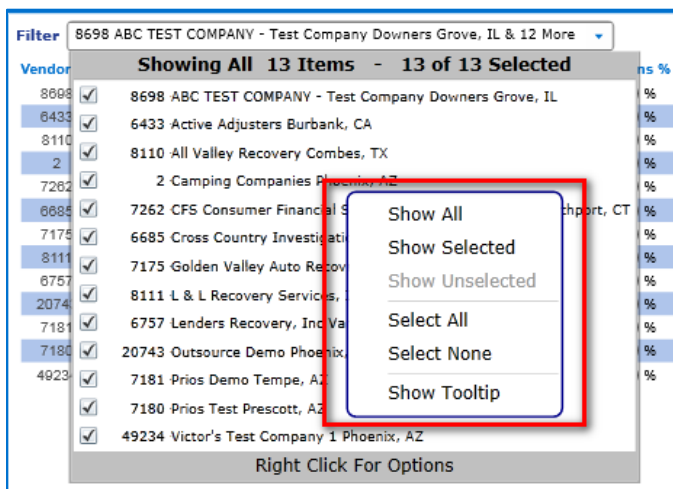
A **Filter** dropdown will allow the user to narrow down the search criteria by individual company by making checkbox selections. Once selections are made on the filter dropdown list, it will reload the UI with the newly made selections.



Individual company searches can also be done by placing the cursor on the Filter field and typing in the OCID or name of the desired company.



The user can also right-click on the Filter dropdown list for further selection options. This is especially helpful for users that have very large lists of vendors.



- **Show All:** makes all records visible in the drop-down list if any are hidden.
- **Show Selected:** if you have a specific few companies selected it will hide all unselected companies from view.
- **Show Unselected:** it will show companies that are not selected and hide ones that are selected.
- **Select All:** Will select all companies regardless if hidden or not.
- **Select None:** will unselect all companies.

Columns

Each Top Column is sortable and can be moved left or right depending on the user's preference.

Vendor Vetting column is a total percentage based on all other items that are being vetted for the particular vendor.

Top

Vendor ID	Vendor Name	Bus License %	Auto Ins %	Liability Ins %	Workers Comp Ins %
10410	XYZ Repo - Test Company	25.00 %	100.00 %	100.00 %	0.00 %

Articles of Inc %	Cert of Good Standing %	W9 %	Background Check %	Vendor Vetted %	Questionnaire Sent
100.00 %	100.00 %	100.00 %	100.00 %	78.13 %	10/4/2017

Questionnaire Completed	Background Sent	Background Status	Background Completed	Background Result	Background Exception
10/4/2017	10/19/2017	Completed		Clean	

Required Business Licenses	Business Licenses
4	1

Bottom

Total Overall Percentages Related to above Columns for all your vendors.

Bus License %	Auto Ins %	Liability Ins %	Workers Comp Ins %	Articles of Inc %
25.00 %	100.00 %	100.00 %	0.00 %	100.00 %

Cert of Good Standing %	W9 %	Background Check %	Vendor Vetted %
100.00 %	100.00 %	100.00 %	78.13 %

Hover-Overs

Business License (Hovering over %)

Vendor ID	Vendor Name	Bus License %	Auto Ins %	Liability Ins %	Workers Com
10410	XYZ Repo - Test Company	25.00 %	100.00 %	100.00 %	0.00 %

States Source: Questionnaire		
State	License Required	Has License
Arizona	<input type="checkbox"/>	<input checked="" type="checkbox"/>
California	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Illinois	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Nevada	<input checked="" type="checkbox"/>	<input type="checkbox"/>
New York	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Bus License %

25.00 %

Shows States they do work in, if the state requires a license, and if they have the required license. Totals the Percentage at the bottom of the states that require a license and if they have a license for those states. It also displays where they States they do work was acquired from (Questionnaire).

Clickable

The Text Hyperlinks open a dialogue that allows the user to either view existing documents or to upload documents directly to the selected column type.

Document Upload

Once the new dialogue opens, click the **Add Document** button to expand the document upload fields. Select the file, fill in the fields, make checkbox selections, and click **Save**. The document will be added to the grid.

Bus License %	Auto Ins %	Liability Ins %	Workers Comp Ins %	Articles of Inc %	Cert o
100.00 %	0.00 %	100.00 %	100.00 %	0.00 %	
0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	
0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	
100.00 %	0.00 %	100.00 %	100.00 %	100.00 %	
100.00 %	0.00 %	0.00 %	0.00 %	0.00 %	

20743 - Outsource Demo Auto Insurance Documents

Add Document

Actions	Description	File Name	Is Private	Location Specific	Approved	Expiration Date	Added By	Date Added
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20743 - Outsource Demo Auto Insurance Documents

File

Description

Expiration Date <M/d/yyyy> 15 X

Approved ☐

Is Private ☐

Add Document

Select File

Cancel Save

Actions	Description	File Name	Is Private	Location Specific	Approved	Expiration Date	Added By	Date Added
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20743 - Outsource Demo Auto Insurance Documents

Add Document

Actions	Description	File Name	Is Private	Location Specific	Approved	Expiration Date	Added By	Date Added
	Auto Ins Accord	acord-auto-insurance-2.jl	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	12/31/2017	Josh Mahoney	11/21/2017 7:04:55 PM

Action Buttons

- Refresh Button: Reloads the current information on the screen.
- Creates an excel document from the information currently on the screen.