

Settrax provides 2 distinct features that allow you to manage your case load across facilities, while meeting compliance standards.

These 2 features are:

- Vendor Linking
- Courier Access

Feature Benefits

- Helps manage workload.
- Meets Hospital compliance standards.
- Provides user transparency.

Working as a Team

Through our Vendor Link feature, reps can work as a team providing access to check in, check out, and review Settrax activity across accounts.



Learn more on Vendor Linking

Couriers

Couriers must be assigned Case access via Settrax in order to check in loaner items to meet compliance policy set by the hospitals.



Learn more on Assigning Couriers

Account Sharing

Each rep is required to have their own Settrax account.

Sharing your Settrax login information violates both Settrax and Hospital Policy. Violating this policy may result in account termination without refund.

Any questions regarding these features or policies should be directed to support@settrax.com.

Understanding Vendor Linking

- You can link with multiple vendors.
- Just as easily as you link a vendor, you can unlink them - it doesn't have to be permanent.
- Vendor links can go one way and is helpful when you want someone to be able to access your cases, but not vice versa.
- Vendor links allow you to share the workload, while meeting hospital compliance policy.
- Creating a vendor link means you can use one another's entire loaner library, including consignment and set lists.

Understanding Courier Limitations

COURIERS CAN:

- Capture Images + Weights of Trays
- Load Trays already in your Loaner Inventory
- Adjust Hold/Open, Implant, and Turnover Status
- Print labels

COURIERS CANNOT:

- Create + add New Trays in your inventory
- Upload or attach IFU's + Count Sheets
- Schedule a new case on your behalf
- access your full schedule of cases.
- Make any schedule adjustments to your case

Not Sure Which Feature is Right For You?

To choose the best feature for your team, start by assessing your current team structure, workload, and capacity. Be realistic about how you'll integrate Settrax's tools into your workflow to maximize efficiency and impact.

The comparison chart below breaks down the key differences between vendor users and courier users, giving you the clarity you need to make the best decision for your team.

User Account Type Comparison

Feature	Vendor Users	Courier Users
System Access	Full access to the entire Settrax system (scheduling, reporting, kiosk)	No manual access to the kiosk or scheduled cases.
Case Scheduling	Can schedule cases independently	Cannot schedule cases or receive scheduled cases
Check-In/Check-Out	Can check in and out trays independently	Must be granted one-time access by a vendor to check in/out trays
Independence	Operates independently within the Settrax system	Subordinate to vendor users, requires permission for each task
Loaner Tray Management	Can add/remove loaner trays and upload IFUs/count sheets	Cannot add/remove loaner trays or upload IFUs/count sheets
Device Use	Can operate via personal device for scheduling and tray management	Cannot operate independently, relies on vendor access
Access Scope	Access limited to own company and assigned cases	Universal access across Settrax, can be assigned cases by any vendor/company
Hospital Access	Can interact with assigned hospitals through Settrax	Can deliver to any hospital within the Settrax system when assigned by a vendor.