FASTTRAK Digital Signature User Guide

Overview

The FASTTRAK Digital Signature feature-set allows your organization to send, receive and track Digital signing requests to your customers based on your organization's needs. This guide will provide an overview of the various features of the Digital Signature product. Keep in mind, you will need to have a paid subscription to the Digital Signature product before the Digital Signing features will be available.

Available Features:

FASTTRAK Ultimate:

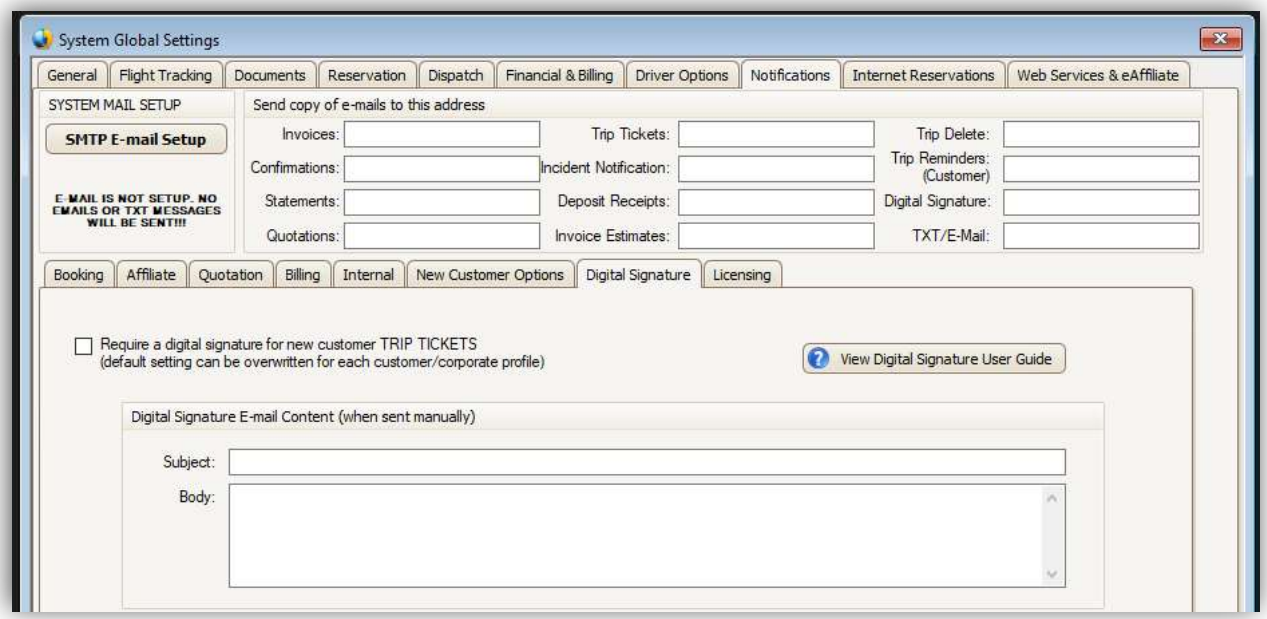
- Manually send Digital Signing requests for Trip Invoice Estimates, including multi-documents within a single signed document.
- View status/history, original document and resulting signed document from the Digital Signature History list.

FASTTRAK Express

- Support customer signing of Trip Ticket Confirmations from directly within the browser.
- Visual feedback on trip ticket signing status from the dispatch and driver jobs grid.

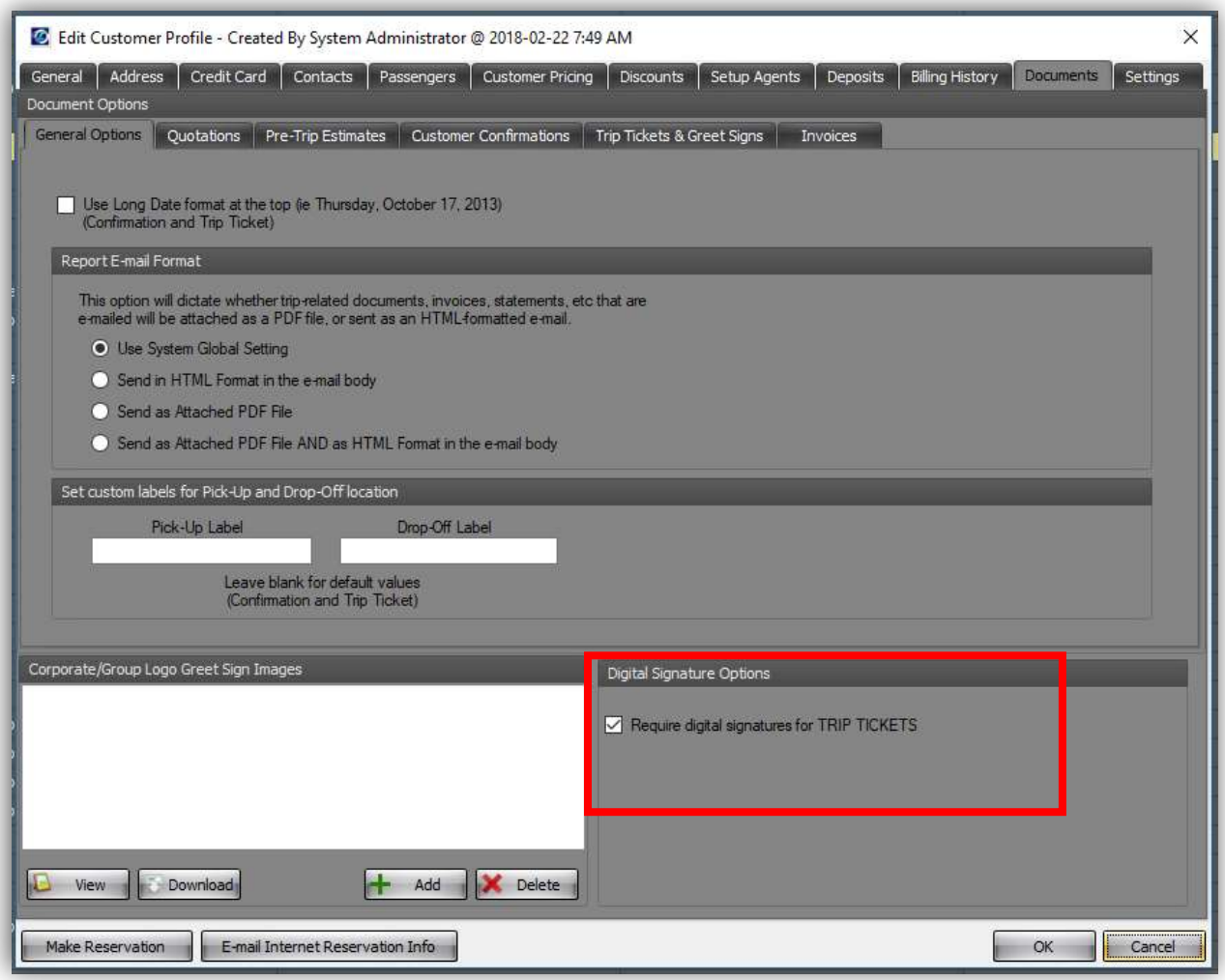
System Setup and configuration (Defaults)

Once a Digital Signature subscription has been purchased and provisioned through FASTTRAK Support, additional options will be available within the FASTTRAK UI. General configuration and that for new customers will be available under the Notifications → Digital Signature tab. From here, you can require a digital signature on confirmations and trip tickets for all new customers by default, configure signing reminders to be sent when a reservation is modified, and configure the message sent to customers within the signing request (shown below).

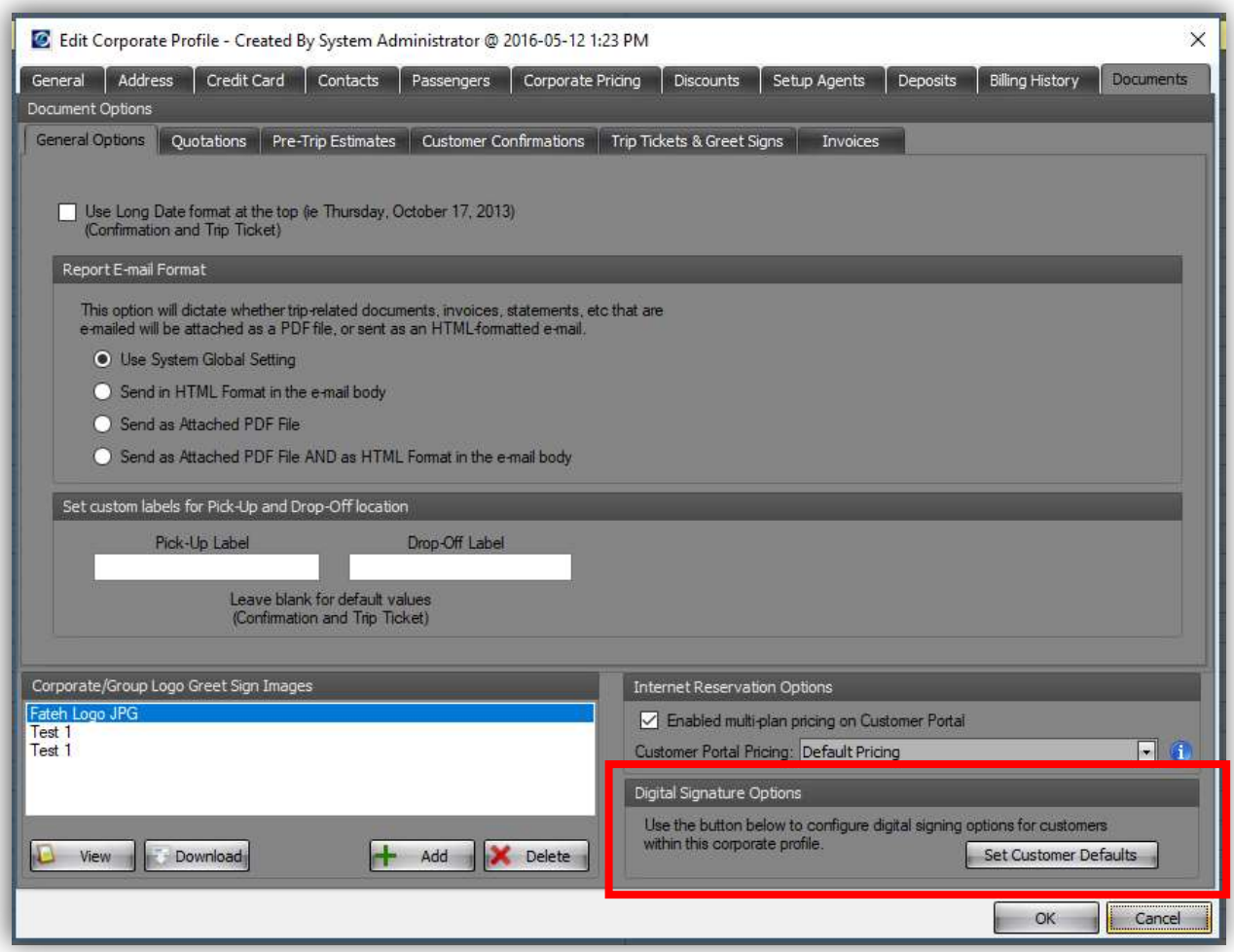


Customer/Corporate Digital Signing Configuration

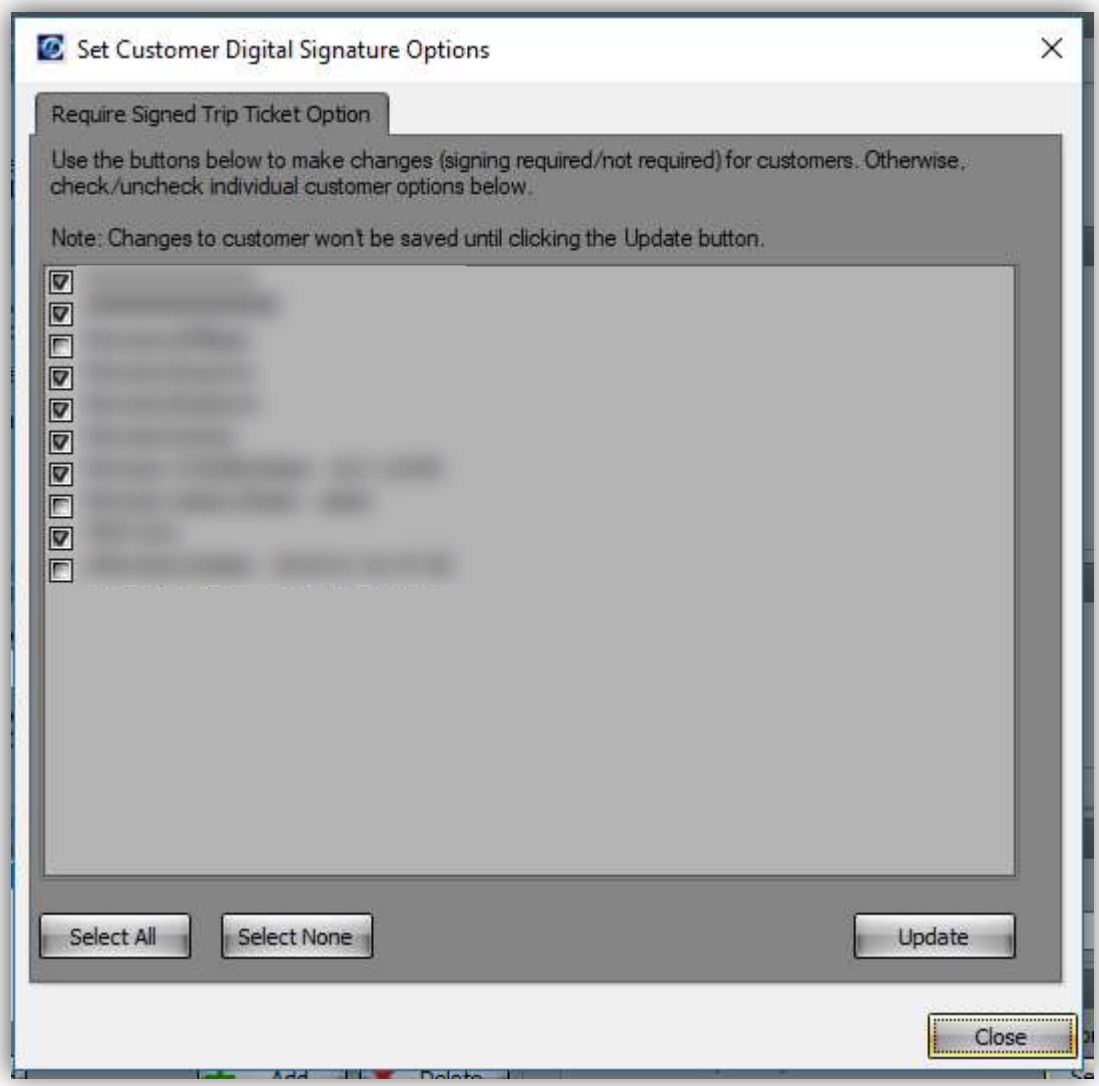
Additional configuration is available within the customer record and/or corporate profile record. Specifically, you can require digital signing requests for existing customers by leveraging options within the customer/corporate profile record, shown below.



Corporate profiles can update one or more customers in bulk from within the Corporate Profile record.


Edit Corporate Profile - Created By System Administrator @ 2016-05-12 1:23 PM
General
Address
Credit Card
Contacts
Passengers
Corporate Pricing
Discounts
Setup Agents
Deposits
Billing History
Documents
Document Options
General Options
Quotations
Pre-Trip Estimates
Customer Confirmations
Trip Tickets & Greet Signs
Invoices
Use Long Date format at the top (ie Thursday, October 17, 2013)
(Confirmation and Trip Ticket)
Report E-mail Format
This option will dictate whether trip-related documents, invoices, statements, etc that are e-mailed will be attached as a PDF file, or sent as an HTML-formatted e-mail.
Use System Global Setting
Send in HTML Format in the e-mail body
Send as Attached PDF File
Send as Attached PDF File AND as HTML Format in the e-mail body
Set custom labels for Pick-Up and Drop-Off location
Pick-Up Label
Drop-Off Label
Leave blank for default values
(Confirmation and Trip Ticket)
Corporate/Group Logo Greet Sign Images
Fateh Logo JPG
Test 1
Test 1
View
Download
Add
Delete
Internet Reservation Options
Enabled multi-plan pricing on Customer Portal
Customer Portal Pricing:
Default Pricing
Digital Signature Options
Use the button below to configure digital signing options for customers within this corporate profile.
Set Customer Defaults
OK
Cancel

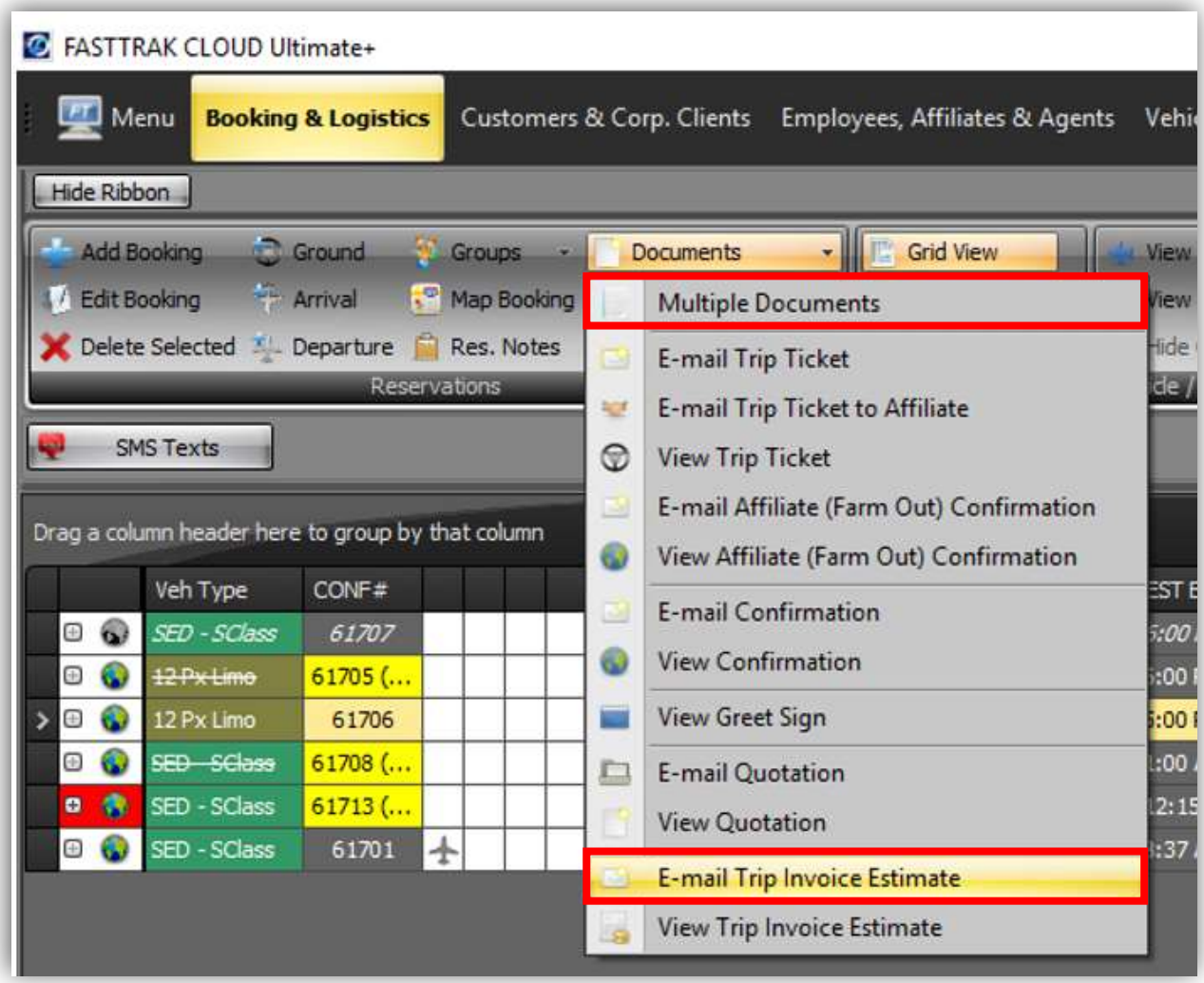
Simply select the customers that you would like to enable automatic Digital Signing requests for Confirmations and Trip Tickets.



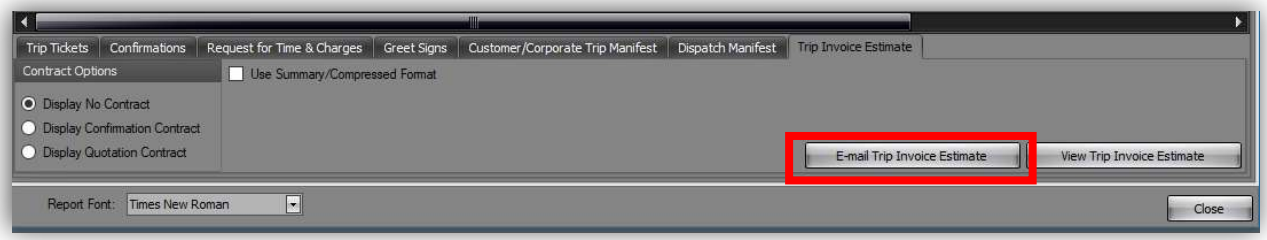
Trip Invoice Estimate Digital Signature Requests

Digital Signature requests can be sent manually in one of two ways:

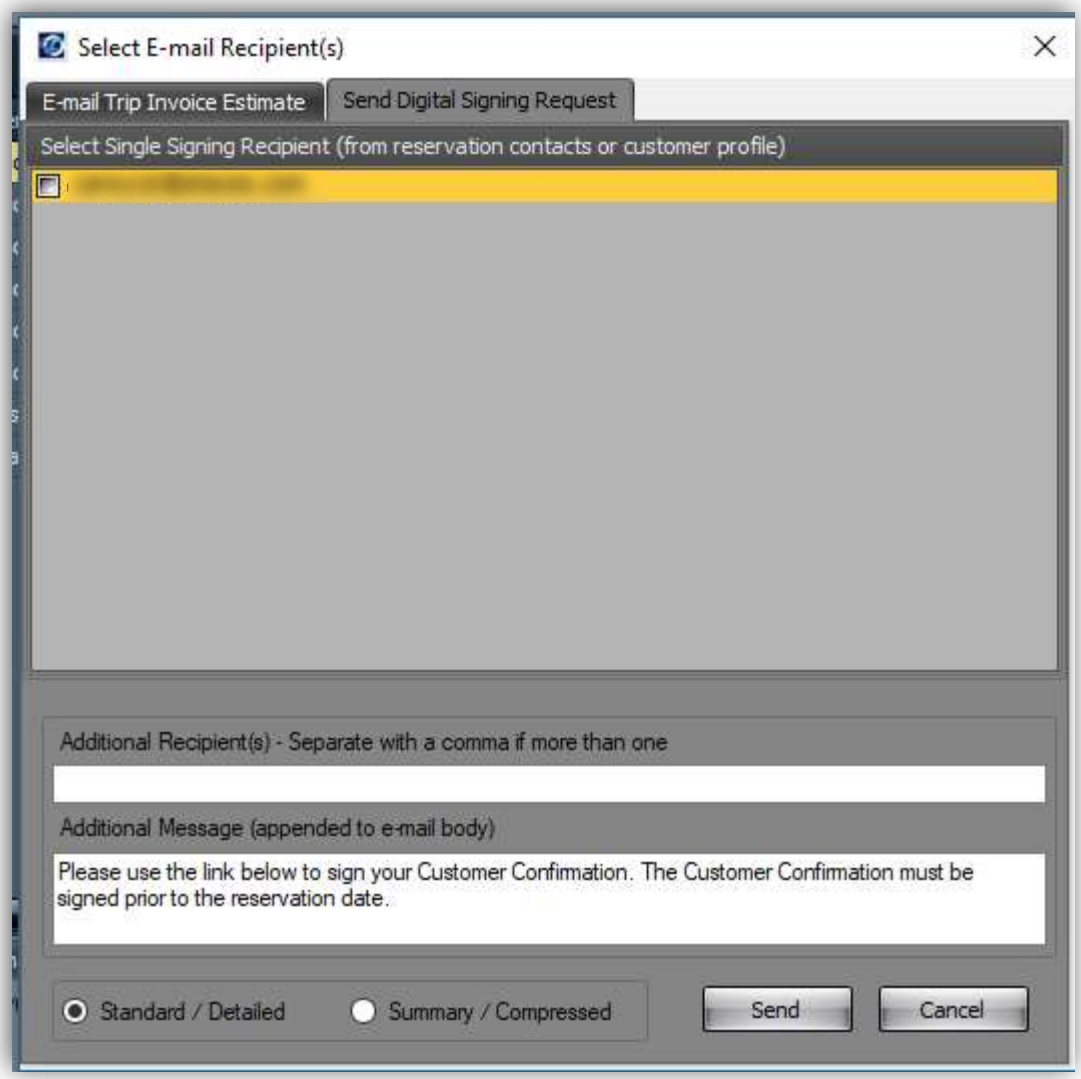
- Dispatch Grid Menu -> Documents -> Multiple-Documents
- Dispatch Grid Menu → Documents → E-mail Trip Invoice Estimate option



E-mail Trip Invoice Estimate option from Multiple Documents.

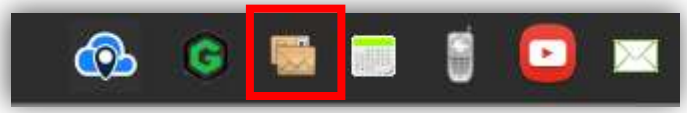


The usual options are available when rendering the Trip Invoice for the Digital Singing Request. Select at most, one recipient for the Digital Signing request.



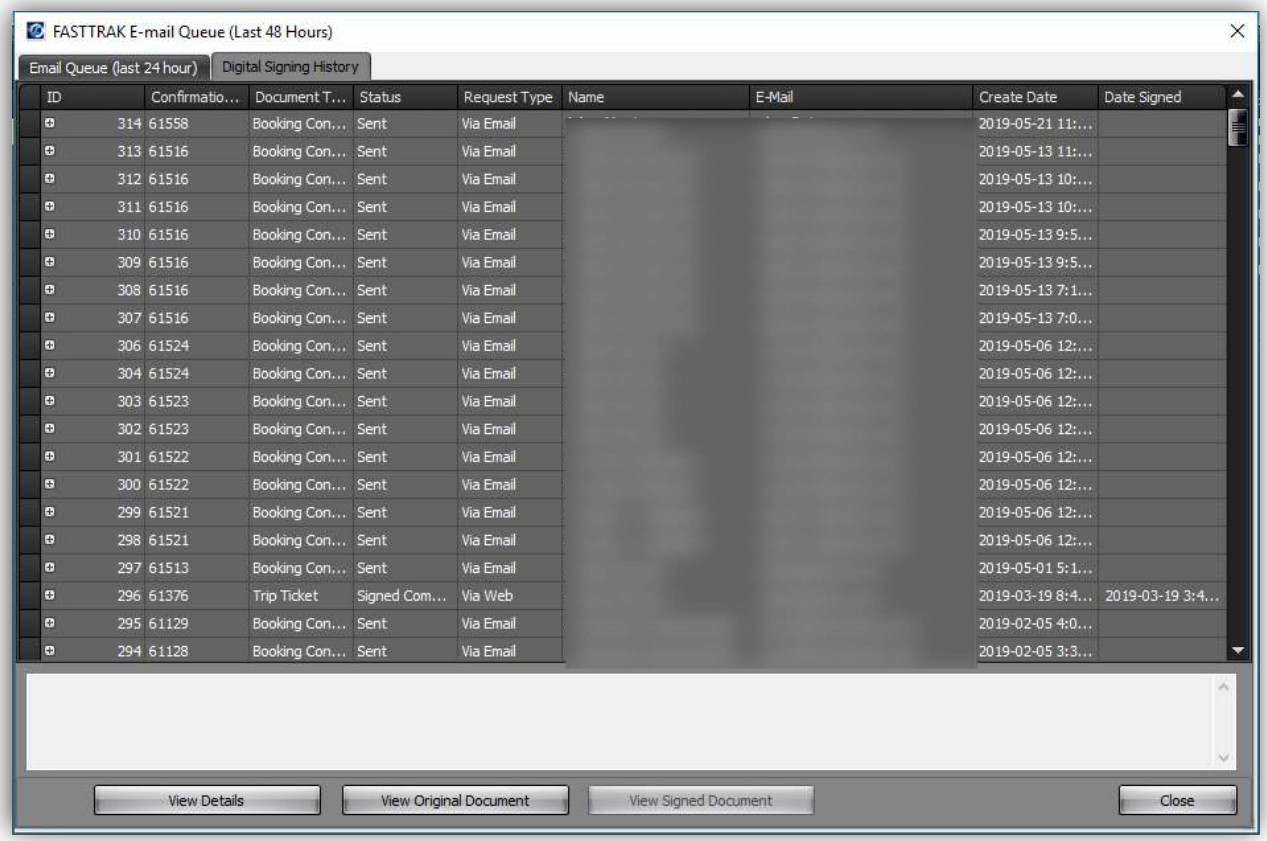
Digital Signing History

You can view a history and current status of all Digital Signature requests from the Digital Signature History, available from within the existing Email Document Queue (shown below).

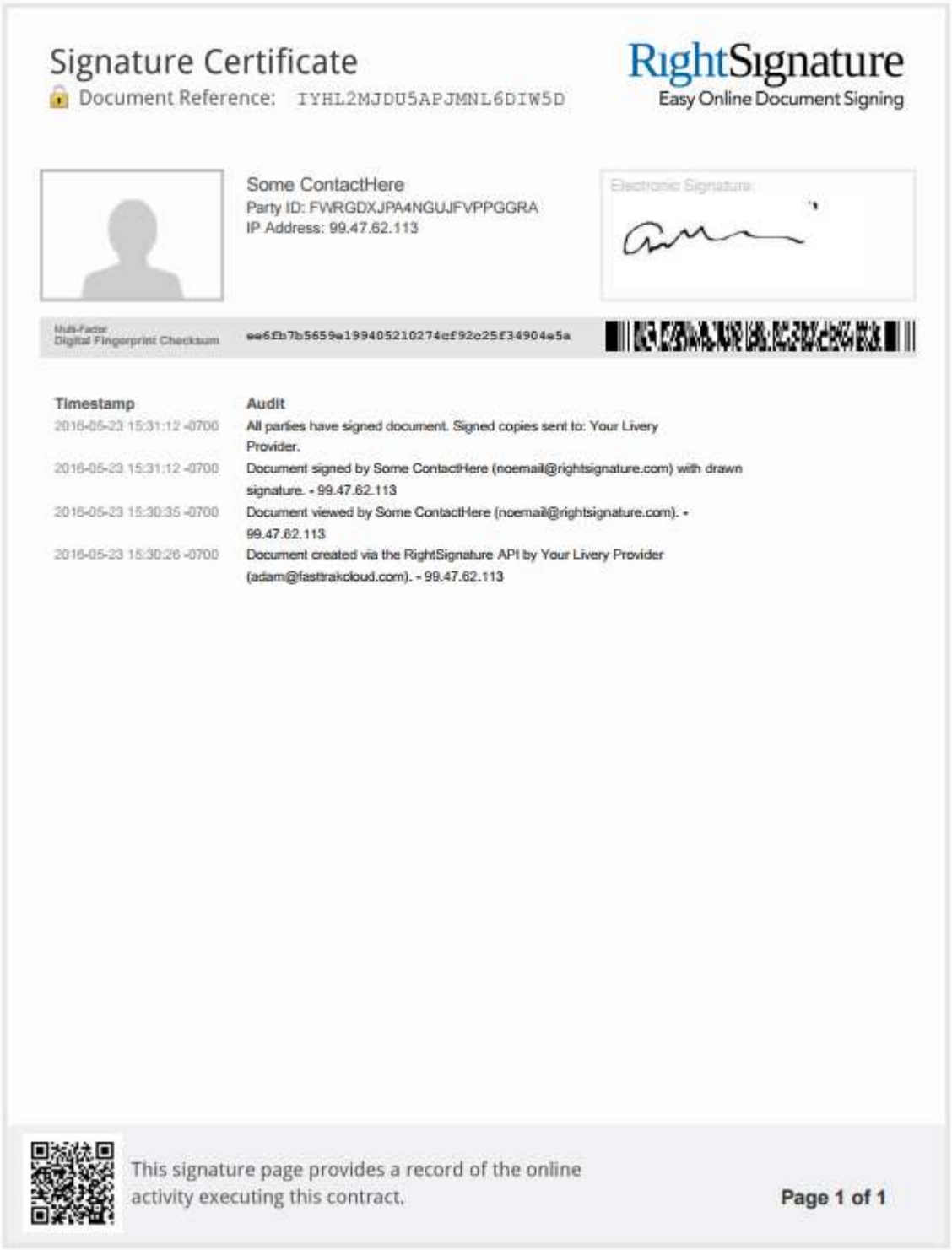


From here, you can expand individual requests and choose from a variety of options, including:

- View reservations included in signing request
- View date/time on when the request was sent, opened, and signed.
- View the original document as sent to the customer
- View the signed document once signing is complete.



Signed documents will include a signature page in the signed document which includes a variety detail about the signing request. An example signature page is shown below.



Signature Certificate

Document Reference: IYHL2MJDU5APJMNL6DIW5D

RightSignature
Easy Online Document Signing

Some ContactHere
Party ID: FWRGDXJPA4NGUJFVPPGGRA
IP Address: 99.47.62.113

Electronic Signature:

Multi-Factor Digital Fingerprint Checksum: ee6fb7b5659e199405210274cf92c25f34904e5a

Timestamp	Audit
2016-05-23 15:31:12 -0700	All parties have signed document. Signed copies sent to: Your Livery Provider.
2016-05-23 15:31:12 -0700	Document signed by Some ContactHere (noemail@rightsignature.com) with drawn signature. - 99.47.62.113
2016-05-23 15:30:35 -0700	Document viewed by Some ContactHere (noemail@rightsignature.com). - 99.47.62.113
2016-05-23 15:30:26 -0700	Document created via the RightSignature API by Your Livery Provider (adam@fasttrakcloud.com). - 99.47.62.113

This signature page provides a record of the online activity executing this contract.

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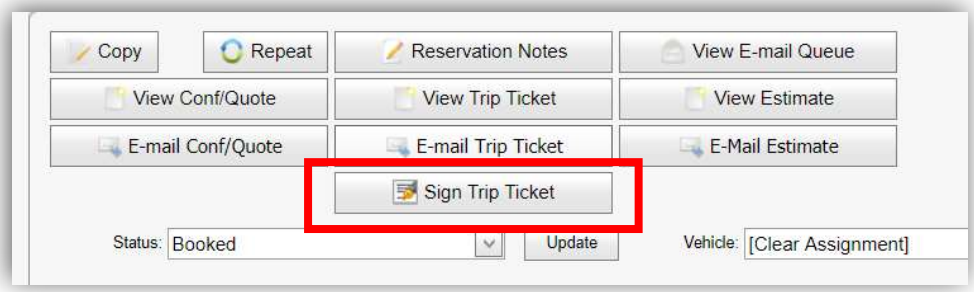
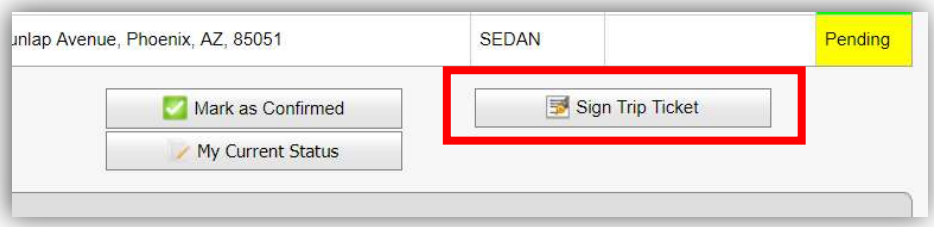
Driver-initiated Trip-Ticket Signature Request

Digital signature options have been included in FASTTRAK express to allow for the Digital Signing of Trip Tickets by customers. That is, a Trip Ticket can be generated in real-time from FASTTRAK Express and provided to a customer on an iPad or another mobile device. Visual feedback from within the dispatch and driver jobs grid will designate whether a signing request is required for the customer. These include a Signature column which is highlighted when required and a Sign Trip Ticket button on the View Trip Ticket page (described below).

To generate a digital signing request in real-time, select a booking that requires a signature and click the Sign Trip Ticket button from the express menu. This will open the document for signing, and will redirect back to Express when complete.



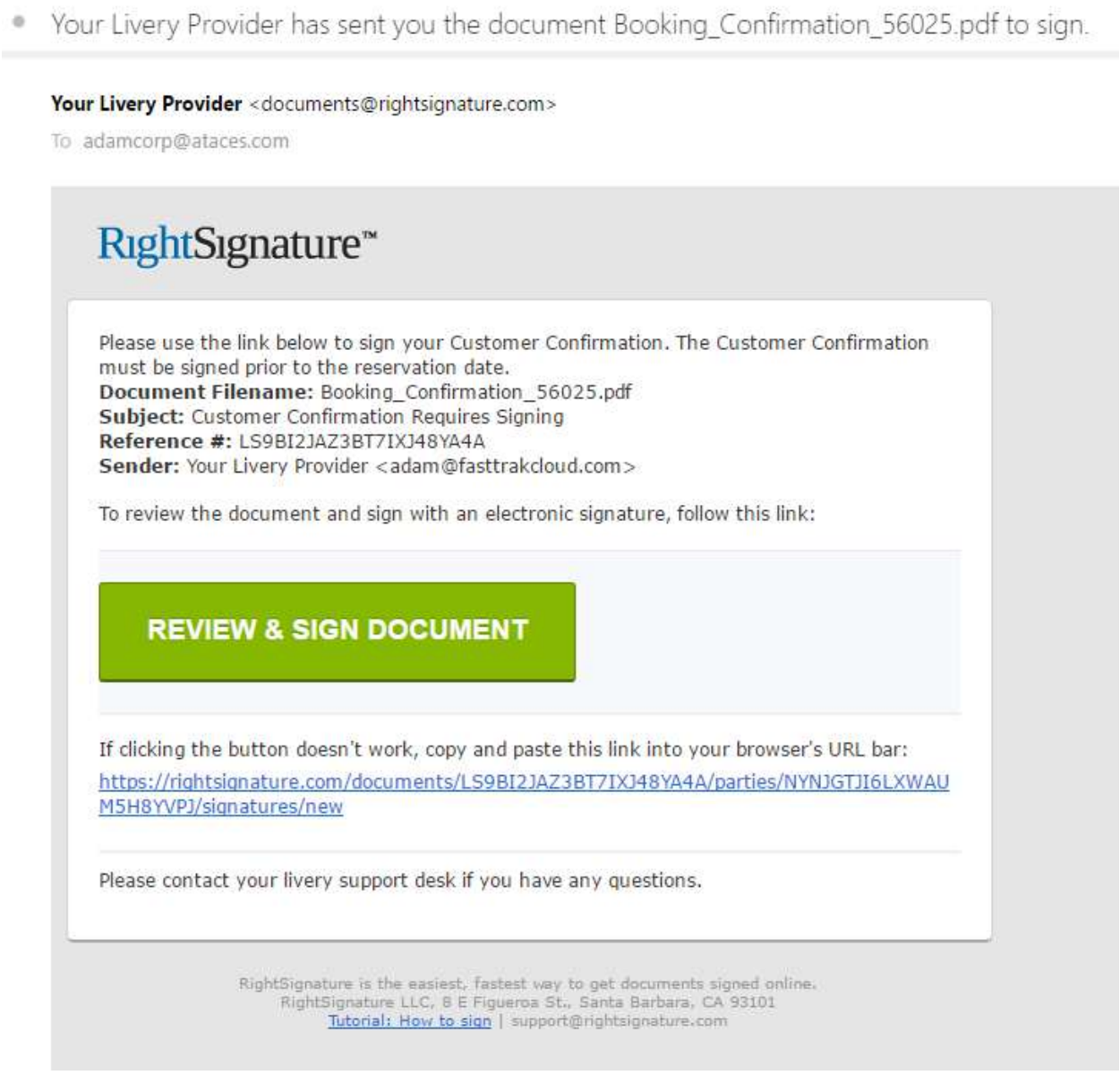
Dispatch



Driver

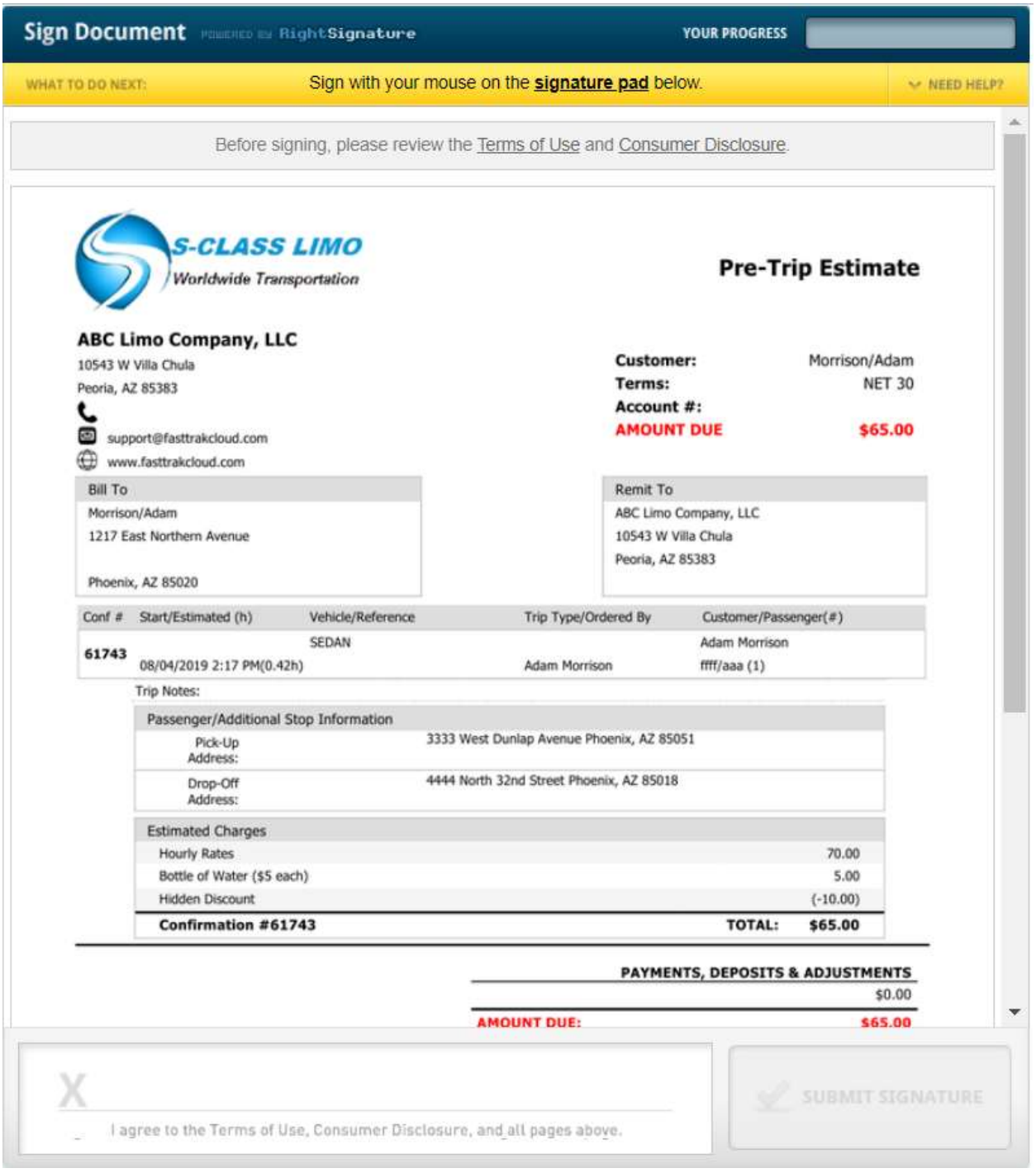
Digital Signing Request Emails and RightSignature UI

When a digital signature request is sent to a customer, they will receive an email with instructions to sign the corresponding document. This link will take them to a 3rd-party site managed by RightSignature, a Citrix company. The UI on that site is tailored to the device and will display differently on a mobile vs. standard device.

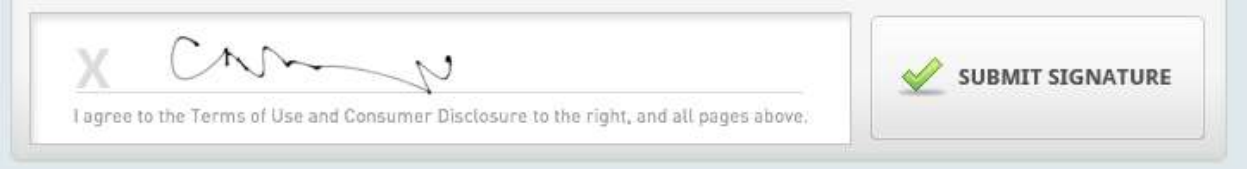


Note: The header message can be configured within the FASTTRAK system settings. "*Please use the link below to sign your Customer Confirmation. The Customer Confirmation must be signed prior to the reservation date.*"

The user will click the green button to access the digital document from RightSignature.



Once loaded, the customer will use their mouse (laptop) or finger (mobile) to digitally sign the document.



Once signed, status is immediately updated in FASTTRAK and a copy of the signed documents is sent to the company email address and the customer for record purposes. Otherwise, the document is always accessible from the FASTTRAK Digital Signature history UI.