



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:

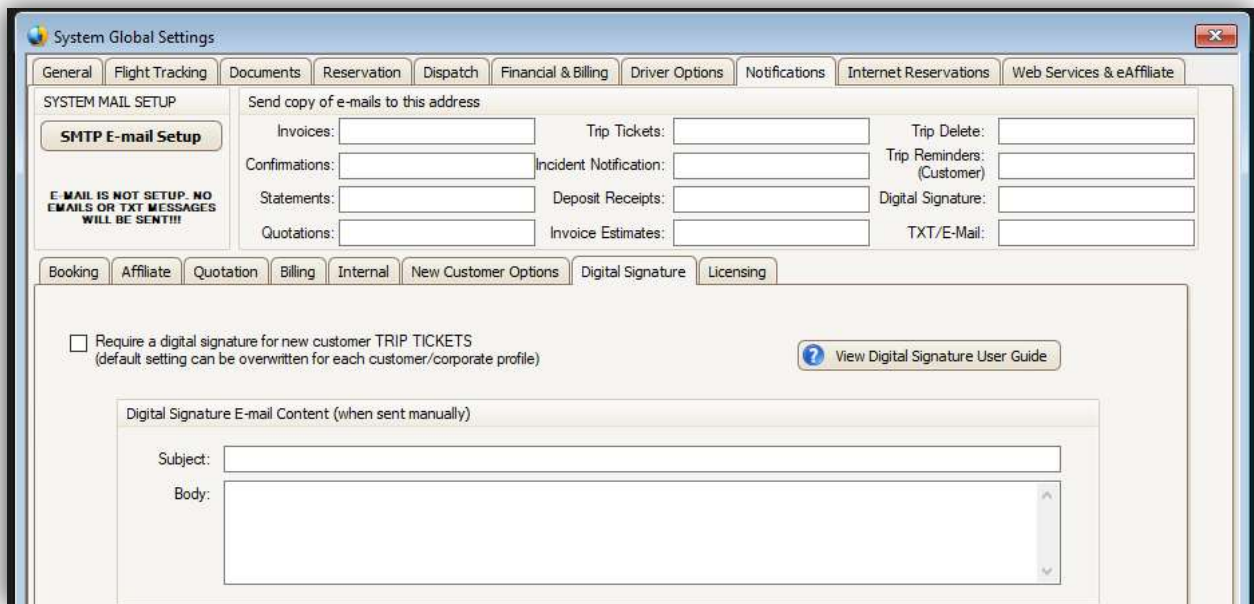
- Manually send Digital Signing requests for Trip Invoice Estimates, including multi-documents within a single signed document.
- View status/history, original document and resulting signed document from the Digital Signature History list.

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)

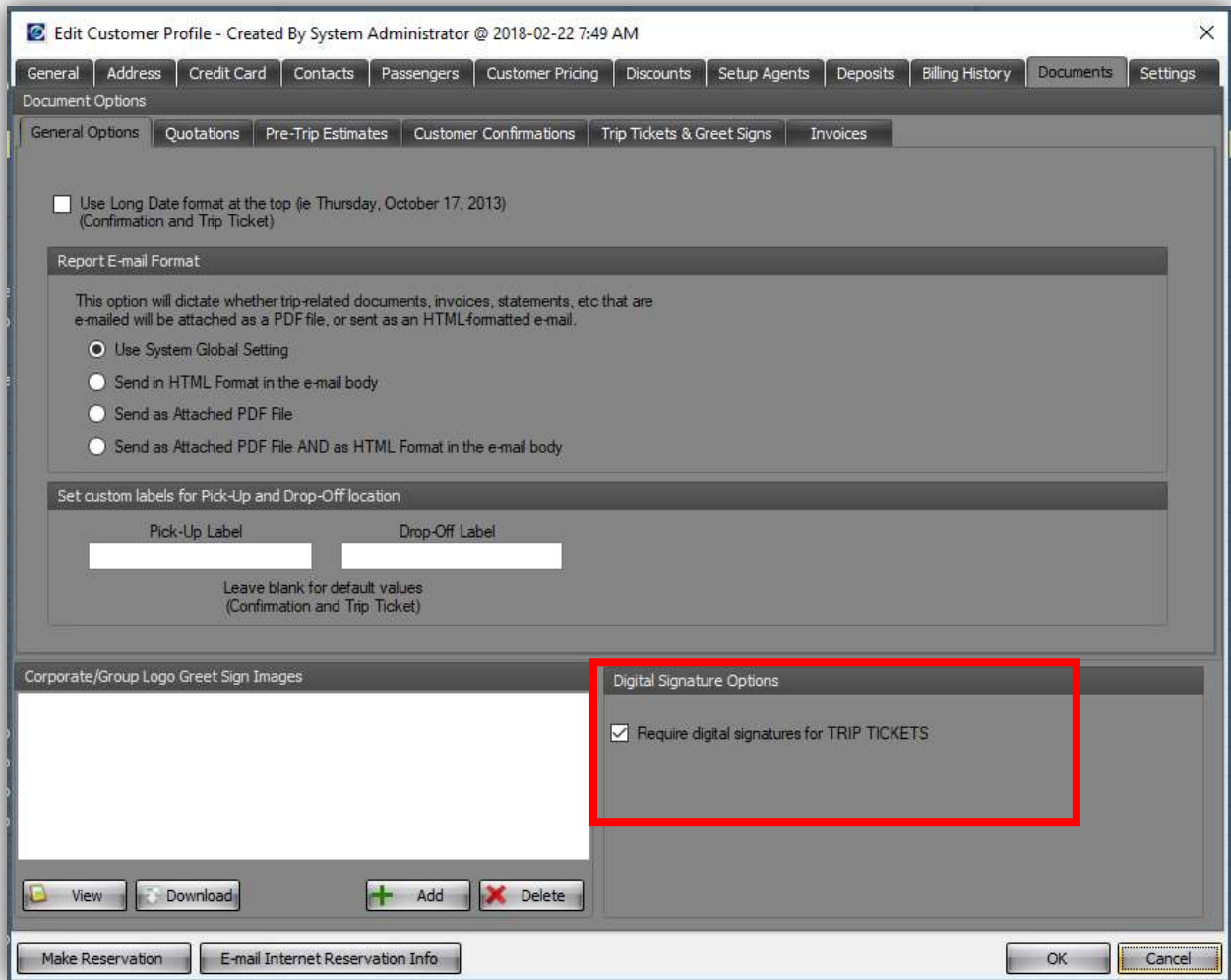
Once a Digital Signature subscription has been purchased and provisioned through FASTTRAK Support, additional options will be available within the FASTTRAK UI. General configuration and that for new customers will be available under the Notifications → Digital Signature tab. From here, you can require 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).



The screenshot shows the "System Global Settings" window with the "Digital Signature" tab selected. The window title is "System Global Settings". The tabs at the top are: General, Flight Tracking, Documents, Reservation, Dispatch, Financial & Billing, Driver Options, Notifications, Internet Reservations, and Web Services & eAffiliate. The "SYSTEM MAIL SETUP" section includes a "SMTP E-mail Setup" button and a warning: "E-MAIL IS NOT SETUP. NO EMAILS OR TXT MESSAGES WILL BE SENT!!!". Below this is a "Send copy of e-mails to this address" section with input fields for: Invoices, Trip Tickets, Trip Delete, Confirmations, Incident Notification, Trip Reminders (Customer), Statements, Deposit Receipts, Digital Signature, and Quotations, Invoice Estimates, and TXT/E-Mail. The "Digital Signature" tab is active, showing a checkbox for "Require a digital signature for new customer TRIP TICKETS (default setting can be overwritten for each customer/corporate profile)" and a "View Digital Signature User Guide" button. Below this is a section for "Digital Signature E-mail Content (when sent manually)" with input fields for "Subject:" and "Body:".

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.



The screenshot displays the 'Edit Customer Profile' window, titled 'Edit Customer Profile - Created By System Administrator @ 2018-02-22 7:49 AM'. The window features a tabbed interface with the following tabs: General, Address, Credit Card, Contacts, Passengers, Customer Pricing, Discounts, Setup Agents, Deposits, Billing History, Documents, and Settings. The 'Documents' tab is active, showing sub-tabs for General Options, Quotations, Pre-Trip Estimates, Customer Confirmations, Trip Tickets & Greet Signs, and Invoices. The 'Trip Tickets & Greet Signs' sub-tab is selected, revealing several configuration options:

- 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**
 -
 - Buttons: View, Download, Add, Delete
- Digital Signature Options** (highlighted in red)
 - Require digital signatures for TRIP TICKETS

At the bottom of the window, there are buttons for 'Make Reservation', 'E-mail Internet Reservation Info', 'OK', and 'Cancel'.

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

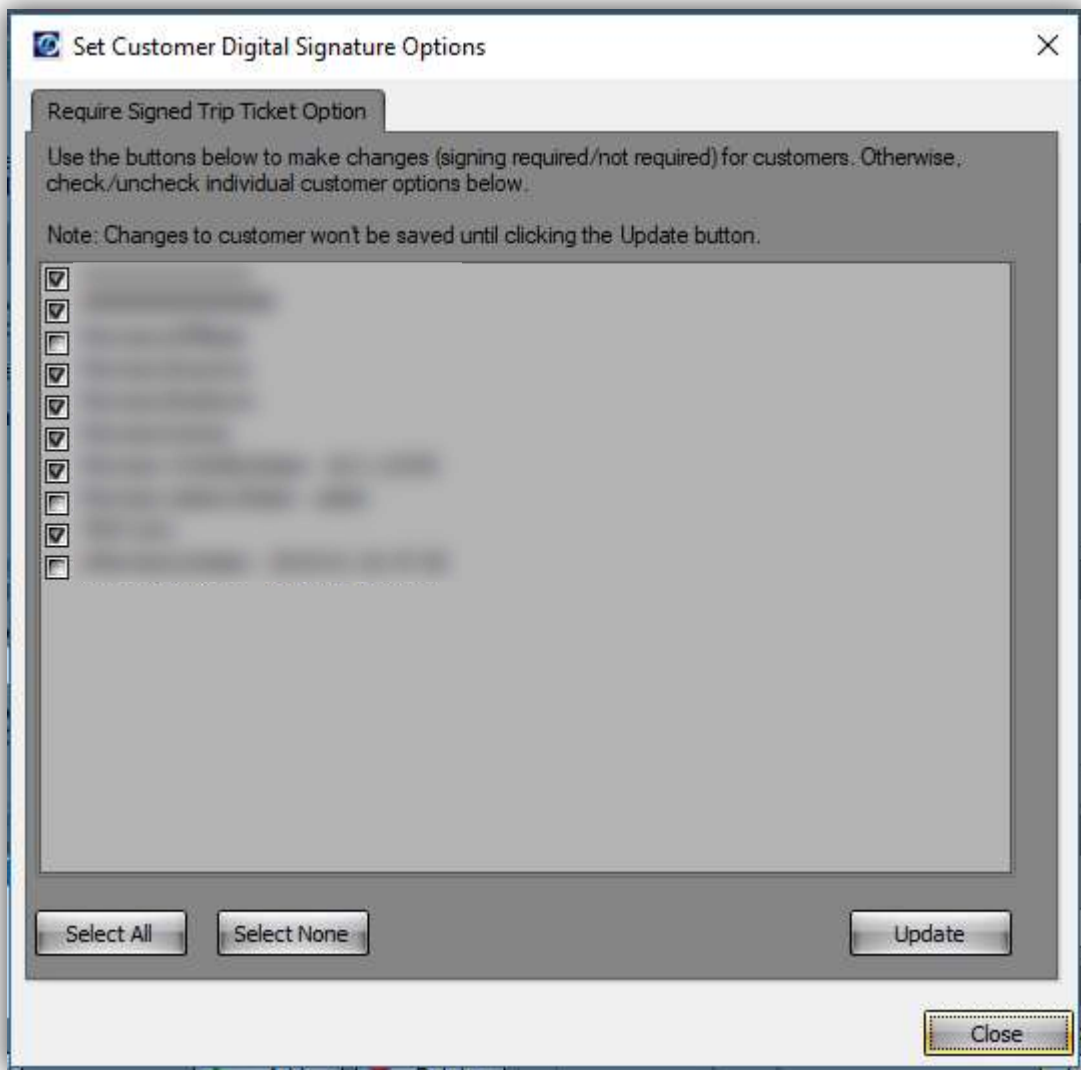
Digital Signature Options

Use the button below to configure digital signing options for customers within this corporate profile.

Set Customer Defaults

OK | Cancel

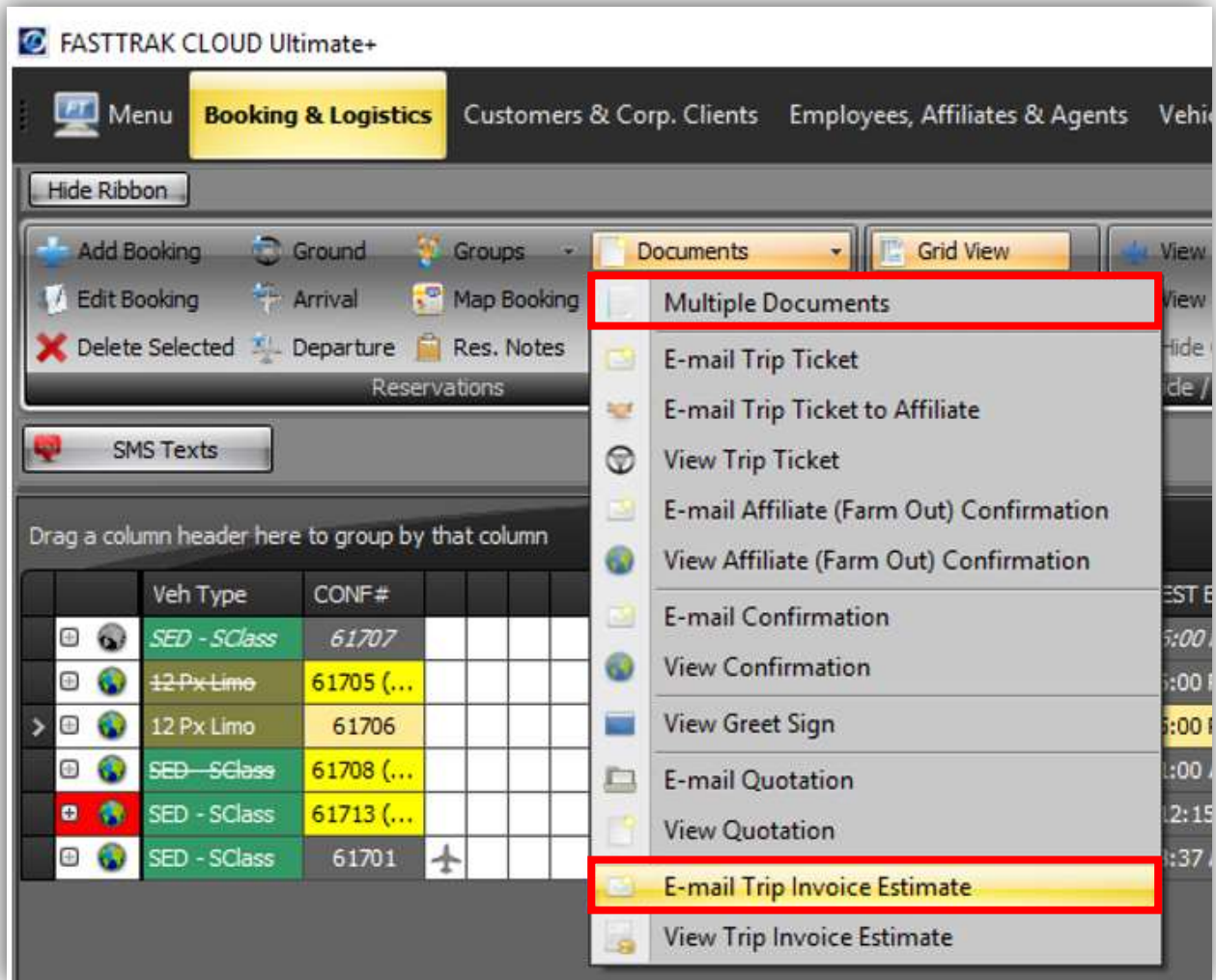
Simply select the customers that you would like to enable automatic Digital Signing requests for Confirmations and Trip Tickets.



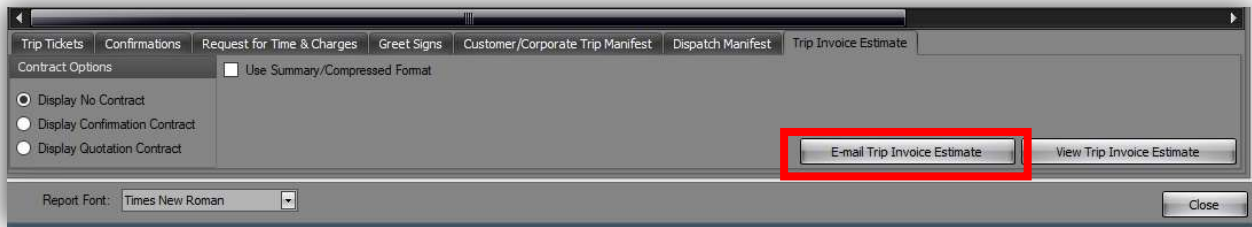
Trip Invoice Estimate Digital Signature Requests

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

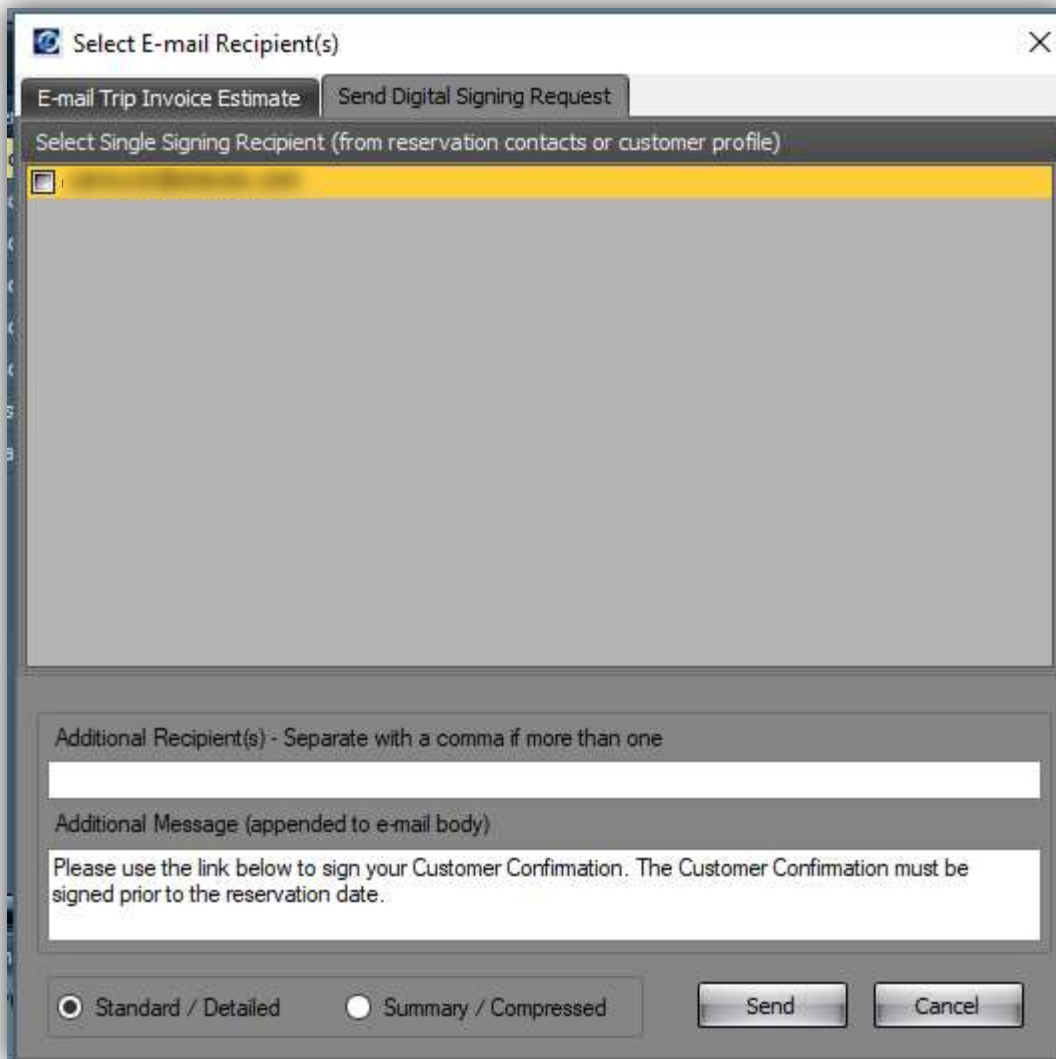
- Dispatch Grid Menu -> Documents -> Multiple-Documents
- Dispatch Grid Menu → Documents → E-mail Trip Invoice Estimate option



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.

FASTTRAK E-mail Queue (Last 48 Hours)

Email Queue (last 24 hours) | Digital Signing History

ID	Confirmatio...	Document T...	Status	Request Type	Name	E-Mail	Create Date	Date Signed
314	61558	Booking Con...	Sent	Via Email			2019-05-21 11:...	
313	61516	Booking Con...	Sent	Via Email			2019-05-13 11:...	
312	61516	Booking Con...	Sent	Via Email			2019-05-13 10:...	
311	61516	Booking Con...	Sent	Via Email			2019-05-13 10:...	
310	61516	Booking Con...	Sent	Via Email			2019-05-13 9:5...	
309	61516	Booking Con...	Sent	Via Email			2019-05-13 9:5...	
308	61516	Booking Con...	Sent	Via Email			2019-05-13 7:1...	
307	61516	Booking Con...	Sent	Via Email			2019-05-13 7:0...	
306	61524	Booking Con...	Sent	Via Email			2019-05-06 12:...	
304	61524	Booking Con...	Sent	Via Email			2019-05-06 12:...	
303	61523	Booking Con...	Sent	Via Email			2019-05-06 12:...	
302	61523	Booking Con...	Sent	Via Email			2019-05-06 12:...	
301	61522	Booking Con...	Sent	Via Email			2019-05-06 12:...	
300	61522	Booking Con...	Sent	Via Email			2019-05-06 12:...	
299	61521	Booking Con...	Sent	Via Email			2019-05-06 12:...	
298	61521	Booking Con...	Sent	Via Email			2019-05-06 12:...	
297	61513	Booking Con...	Sent	Via Email			2019-05-01 5:1...	
296	61376	Trip Ticket	Signed Com...	Via Web			2019-03-19 8:4...	2019-03-19 3:4...
295	61129	Booking Con...	Sent	Via Email			2019-02-05 4:0...	
294	61128	Booking Con...	Sent	Via Email			2019-02-05 3:3...	

View Details | View Original Document | View Signed Document | Close

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: IYHL2MJDDU5APJMNL6DIW5D

RightSignature
Easy Online Document Signing



Some ContactHere
Party ID: FWRGDYJPA4NGUJFVPPGGRA
IP Address: 99.47.62.113

Electronic Signature:



Multi-Factor
Digital Fingerprint Checksum: ee6E17b5659e199405210274ef92e25f34904e5a 

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.

Page 1 of 1

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).

Origin	Flight Status	Signature
FASTTRAK	Invalid	
FASTTRAK		Required
FASTTRAK		Signed

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.

A screenshot of the Express menu interface. It features a grid of buttons: Copy, Repeat, Reservation Notes, View E-mail Queue, View Conf/Quote, View Trip Ticket, View Estimate, E-mail Conf/Quote, E-mail Trip Ticket, E-Mail Estimate, and Sign Trip Ticket. The 'Sign Trip Ticket' button is highlighted with a red box. Below the buttons, there is a 'Status' dropdown menu set to 'Booked' and a 'Vehicle' dropdown menu set to '[Clear Assignment]'. An 'Update' button is located between the status and vehicle dropdowns.

Dispatch

A screenshot of the Dispatch interface. It shows a booking for 'Sunlap Avenue, Phoenix, AZ, 85051' with a 'SEDAN' vehicle and a 'Pending' status. Below this information are three buttons: 'Mark as Confirmed' (with a green checkmark), 'My Current Status', and 'Sign Trip Ticket'. The 'Sign Trip Ticket' button is highlighted with a red box.

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.

- Your Livery Provider has sent you the document `Booking_Confirmation_56025.pdf` to sign.

Your Livery Provider <documents@rightsignature.com>

To: adamcorp@ataces.com

RightSignature™

Please use the link below to sign your Customer Confirmation. The Customer Confirmation must be signed prior to the reservation date.

Document Filename: Booking_Confirmation_56025.pdf

Subject: Customer Confirmation Requires Signing

Reference #: LS9BI2JAZ3BT7IXJ48YA4A

Sender: Your Livery Provider <adam@fasttrakcloud.com>

To review the document and sign with an electronic signature, follow this link:

REVIEW & SIGN DOCUMENT

If clicking the button doesn't work, copy and paste this link into your browser's URL bar:

<https://rightsignature.com/documents/LS9BI2JAZ3BT7IXJ48YA4A/parties/NYNJGTJI6LXWAWUM5H8YVPJ/signatures/new>

Please contact your livery support desk if you have any questions.

RightSignature is the easiest, fastest way to get documents signed online.
RightSignature LLC, 8 E Figueroa St., Santa Barbara, CA 93101
[Tutorial: How to sign](#) | support@rightsignature.com

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.

Sign Document POWERED BY RightSignature YOUR PROGRESS

WHAT TO DO NEXT: Sign with your mouse on the **signature pad** below. NEED HELP?

Before signing, please review the [Terms of Use](#) and [Consumer Disclosure](#).



ABC Limo Company, LLC
 10543 W Villa Chula
 Peoria, AZ 85383
 support@fasttrakcloud.com
 www.fasttrakcloud.com

Pre-Trip Estimate

Customer: Morrison/Adam
Terms: NET 30
Account #:
AMOUNT DUE **\$65.00**

Bill To
 Morrison/Adam
 1217 East Northern Avenue
 Phoenix, AZ 85020

Remit To
 ABC Limo Company, LLC
 10543 W Villa Chula
 Peoria, AZ 85383

Conf #	Start/Estimated (h)	Vehicle/Reference	Trip Type/Ordered By	Customer/Passenger(#)
61743	08/04/2019 2:17 PM(0.42h)	SEDAN	Adam Morrison	Adam Morrison ffff/aaa (1)


Trip Notes:


Passenger/Additional Stop Information	
Pick-Up Address:	3333 West Dunlap Avenue Phoenix, AZ 85051
Drop-Off Address:	4444 North 32nd Street Phoenix, AZ 85018

Estimated Charges	
Hourly Rates	70.00
Bottle of Water (\$5 each)	5.00
Hidden Discount	(-10.00)
Confirmation #61743	TOTAL: \$65.00

PAYMENTS, DEPOSITS & ADJUSTMENTS
 \$0.00
AMOUNT DUE: \$65.00


I agree to the Terms of Use, Consumer Disclosure, and all pages above.






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

A screenshot of a digital signature interface. On the left, there is a large 'X' icon and a handwritten signature in black ink. Below the signature, the text reads "I agree to the Terms of Use and Consumer Disclosure to the right, and all pages above:". On the right, there is a button with a green checkmark icon and the text "SUBMIT SIGNATURE".

X 
I agree to the Terms of Use and Consumer Disclosure to the right, and all pages above.

 **SUBMIT SIGNATURE**

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.