



FASTTRAK TECHNOLOGIES

Customer Portal Setup Guide

Version 0.2, February 2019

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## Introduction

The following document will guide you in the setup and configuration of your Customer Internet Reservation Booking Portal (“Customer Portal” for short). Once configured, this portal will allow your external customers to book directly into your FASTTRAK database using a variety of options available within the FASTTRAK software.



The document is broken into several sections depending on the needs of your organization. After a general overview of the portal, we will start with the simplest booking process available to all FASTTRAK operators right out of the box with minimum setup. Additionally, we will describe advanced customization features using customized Portal Profiles which were made available in early 2019.

This document is broken into multiple sections as follows:

- [Customer Portal Overview](#)
- [General Settings and Configuration](#)
- [Customer/Corporate Profile Pricing and Configuration Options](#)
- [Portal Profile Configuration](#)
- [Custom Website Portal Integration](#)

### Who is this document attended for?

Much of the configuration can be done directly in your FASTTRAK software by a local administrator. However, when integrating directly with your website, it is recommended to gain access to a web developer, so he/she can guide you with setup using technologies such as HTML, CSS, Web Forms, JavaScript, API's, etc.

### End-Customer Help

We also provide you a .pdf help file and online link for your customers that can be found at the link below. Keep in mind, this help guide describes the default portal process and may be very different from your configuration.

<http://www.myfthelp.com/files/customerportalhelp.pdf>



## Customer Portal Overview

The Customer Portal is a simple booking website you can provide to your customers that allow them to book, manage and review reservations online. There are a variety of ways that customers can get access to the portal including direct link, email notification, website integrations, etc. It is up to you to determine the best process for your customers.

Examples:

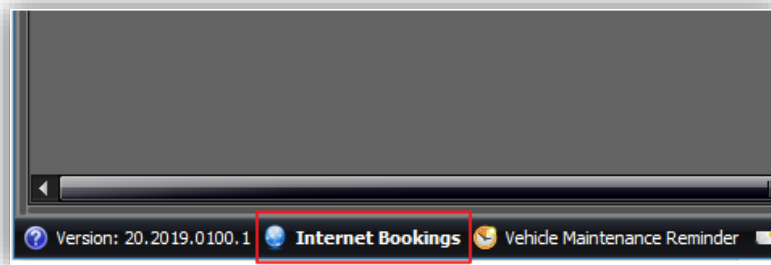
- Your customized direct link; i.e. <https://www.mytripcenter.com?....>.
- Direct link/navigation from your website (custom development on your side)
- Auto-generated e-mail form FASTTRAK Software
- Custom link configured and shared using a variety of means (e-mail, phone, mailing, brochure, etc.)

Once the user has access to the portal, they will go through a simple set of screens as follows:

- Login or New User Access
- Trip Search and Vehicle/Rate Selection
- Passenger/General Information
- Billing and New User Account Information
- Summary and Confirmation

A sample of those screens is shown in [Appendix A](#).

Once all information has been collected, the booking is saved directly into your database and available within the FASTTRAK software. If email has been setup and configured, you will receive an email notification for new and updated bookings. Additionally, you can review bookings made online within the FASTTRAK software by accessing the New Internet Bookings screen.



The booking process itself is configured using a combination of general settings (used by all) and individual Portal Profiles. By default, there is a single “**Default Profile**” that will be used to configure the portal process above. It is this **default** profile that dictates the user booking process when no other portal profiles are configured. It is created for you automatically.



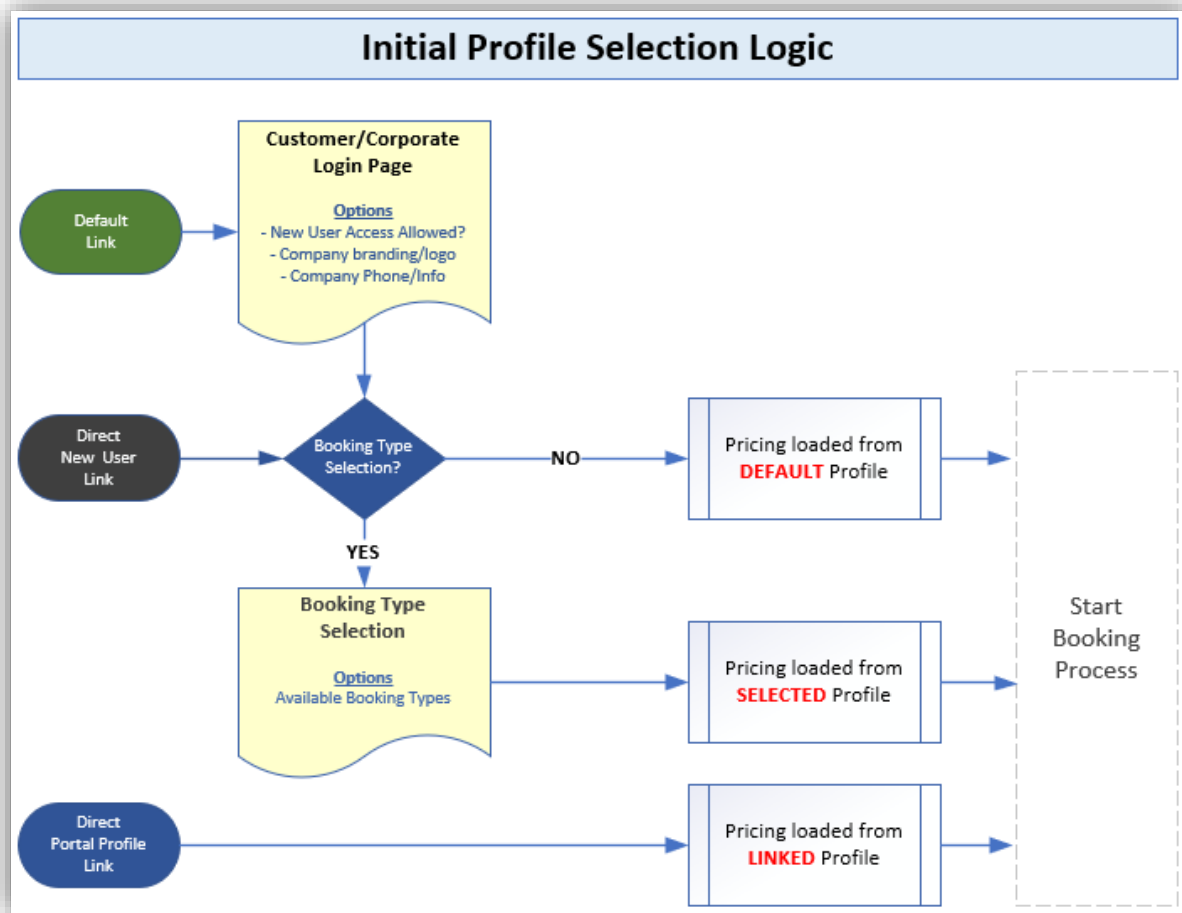
### Customer Portal High-Level Flow

The diagram below describes the flow of the customer portal and the variety of options available to customize the booking process. For clarity, it is broken into two parts; initial profile selection logic and booking process.

### Initial profile Selection Logic

By default, the default profile is selected after login and/or if the new user link is used (bypasses login page). However, even if the user is logging in, a different portal profile can be targeted by enabling the Booking Type selection page; exposes additional Booking Types (i.e. Portal Profiles) as selectable trip options. If the Booking Type selection is enabled and the user has selected a specific Booking Type, that profile and subsequent pricing/configuration will be used for that booking process.

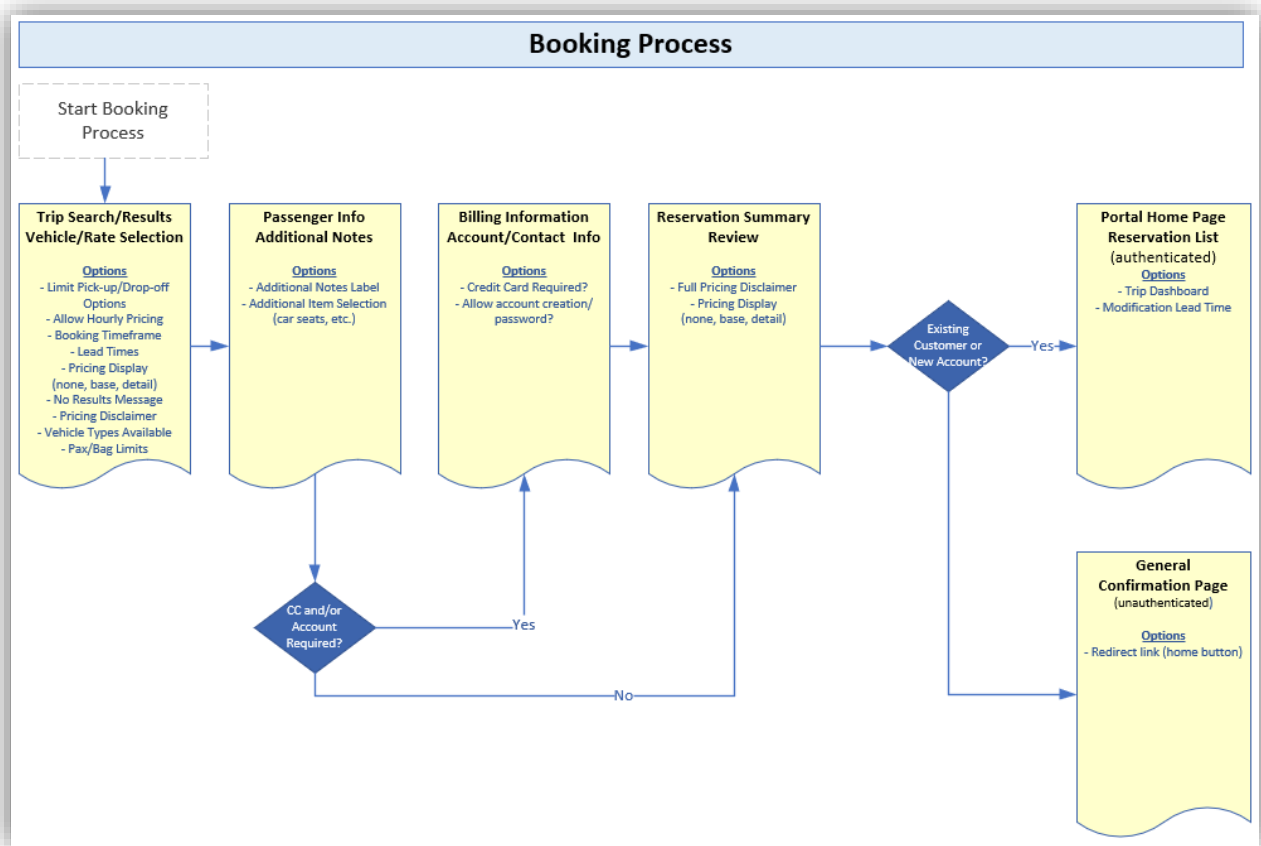
In the diagram below, the target profile is dictated by the link used to access the portal, and whether the Booking Type option is enabled and subsequent selection.





## Booking Process

Once the target profile is selected, the portal process flows across the primary pages depending on specific profile configuration. Additionally, various options are configured for each page (shown in blue) depending on the target profile.



Details of each available configuration option will be discussed in the next section.



## General Settings and Configuration

A combination of settings dictates the functions of the Customer Portal. Each of these must be setup and configured prior to using the portal.

### Pricing Setup

Pricing must be setup within the portal in order to retrieve search results. It is up to you how broad or constrained the pricing will be. The broader the pricing, the better chance of a result the customer will receive. For example, setting up GEO pricing for all rates in the US vs. pricing in the south Florida region only. Once setup, the target pricing plans are configured as part of the Portal Profile settings as described alter in this document.

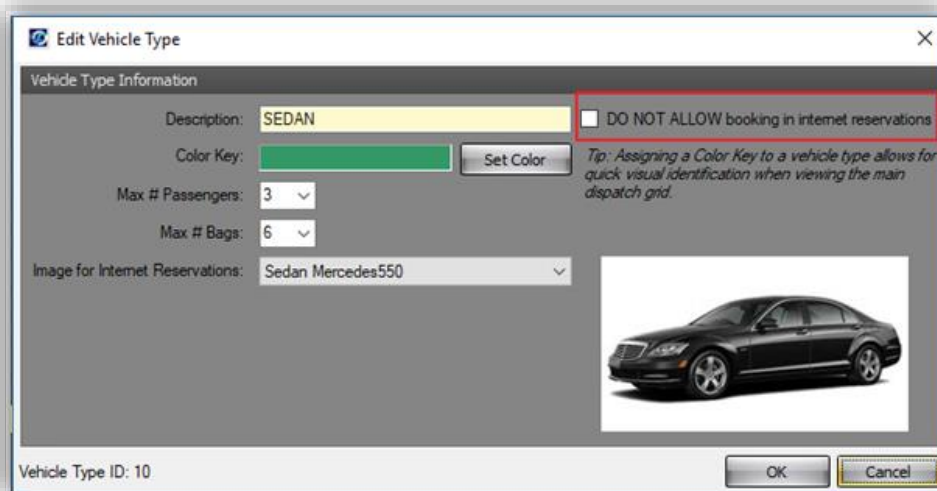
Setup of specific pricing plans is out of scope for this document. Please review FASTTRAK help documentation and/or FASTTRAK help videos for guidance with pricing setup and configuration.

### Vehicle Type Availability

To enable a certain vehicle types within the customer portal, the vehicle type must be enabled within FASTTRAK Vehicle Type configuration. Available configuration that impacts the Customer Portal are as follows:

- Enable/disable vehicle type access within the portal
- Specify the max number of passengers
- Specify the max number of bags
- Specify the image displayed to the customer within the portal.

**Note:** Passenger and bag limits are validated within portal search results. If the vehicle type cannot handle the requested passengers/bags, it will be returned as unavailable.





## General Portal Settings

You configure all Customer Portal settings via the FASTTRAK System Settings screen. In addition to general settings, the 2019 release introduced the concept of **“Portal Profiles”**. Instead of a single set of settings that dictate a single Customer Portal booking process, Portal Profiles allow you to customize more than one processes for your customer needs.

For example, if you want to allow a Group, Hotel or convention travel, etc. to book without requiring a credit card, want to use a limited set of pick-up/drop-off locations, limit the scheduled pick-up timeframe, or many more customizable options, you can do this with customized Portal profiles, configured in System Global Settings.

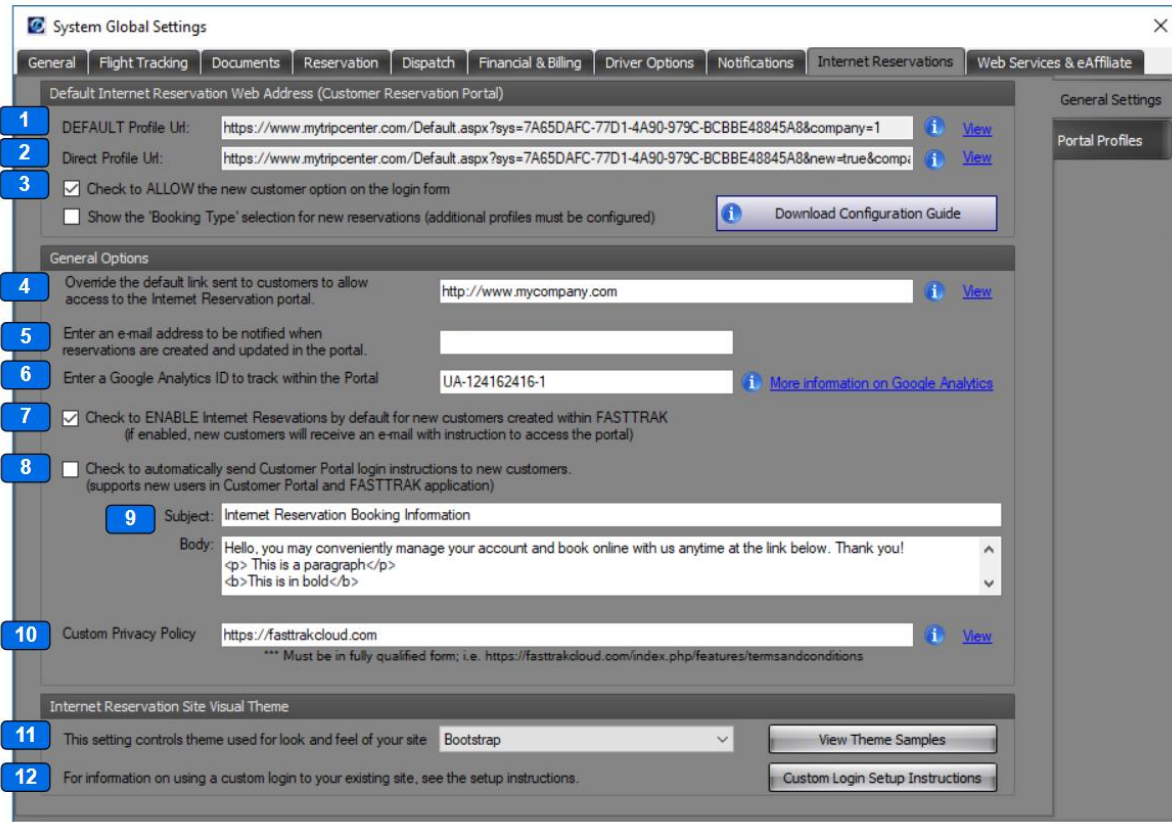
System Global Settings can be opened via the FASTTRAK File menu

[Menu](#) → [System, Company & User Setup](#) → [System Global Settings](#)

From here, navigate to the upper Internet Reservations tab and you will see additional tabs to the right for “General Settings” and “Portal Profiles”. From this screen, you can set “general” settings to be used across all Portal profiles.

**Note:** Many settings previously within this section were moved to Portal Profile configuration. Existing settings were preserved during recent updates and can be found under the Default Profile record (next section).





### Setting Descriptions

1. The default profile link is the link that provides access to your Customer Portal. This link will target your default portal profile and subsequent login page.
2. The direct profile link will also target your default portal profile but will bypass the login page and assume new user access to the portal. (*Developer note: An additional parameter is added the URL to signify new; new=true*).
3. If checked (default), the New User button will be shown on the login page. Uncheck to not allow new/anonymous users to book within your portal.
4. If checked, an intermediate step will be added to the default booking process that allows the customer to select a Booking Type to complete their booking. This booking type selection targets a custom portal profile and subsequent configuration. If unchecked (default), Booking Type selection (and related portal profile) will NOT be accessible via the default process and are only accessible via a direct link (see profile configuration).
5. This email address will receive email notification of all Customer Portal bookings; new and modified.
6. If necessary, you can customize the google analytics ID to be used within your portal. This allows you to track behaviors and user analytics for your customers. See [google analytics website](#) for more information.



7. If checked, users created within FASTTRAK will be enabled for access to the Customer Portal. Keep in mind, this option only enables them for the portal, but does not send them a link automatically.
8. If checked, new customers will receive instructions to access the portal via email automatically when the customer profile record is saved.
9. You can customize the subject and body of the email sent to new customers (or resent to existing customer from customer profile and recovery process). If left blank, a general subject and body will be used.
10. In response to GDPR requirements, internet users who access the portal are shown a message to read/confirm how their information is used within the portal. Once confirmed, the user no longer sees this message. By default, this links to the FASTTRAK Terms and Conditions page. You can override this link using this setting.
11. You can customize the general color scheme for buttons and headers using the theme option. [See the following link](#) for theme examples.
12. Custom website integration is available using basic form posts and URL examples. This allows a developer to implement basic HTML within your website to influence how and if the customer sees the Customer Portal login page. [See the website integration link](#) for more information.



## Customer/Corporate Profile Pricing and Configuration Options

Pricing is one of the more difficult areas to understand within the portal since pricing can come from multiple sources. In general, the following rules apply:

### Targeting Default Portal Profile? (uses customer/corporate configuration)

- New customer: Uses default profile target pricing option.
- Existing customer: Uses pricing configuration within customer or corporate profile
  - Bill Corporate No: Uses Customer Portal Plans or Default plan
  - Bill Corporate Yes: Uses Corporate Portal Plans or Default Profile plan

### Targeting non-Default Portal Profile? (uses profile configuration)

- Profile overrides pricing: Uses portal profile target pricing option
- Profile Not overriding pricing: Uses default portal pricing rules (above)

Additionally, new customers that create a new customer profile will have their default pricing set to the pricing of the selected rate when booking their first trip. Also, the pricing options targeted for future portal reservations will be the same as the options initially queried during their first booking.

Example: New customer searched “Default Pricing” and “Customer Pricing 2019” pricing plans since these were the plans you configured in your default portal profile. When the new customer first booked, they chose a vehicle rate from the Default Pricing plan. Once the booking is complete, the newly created Customer Profile will have the Default Pricing plan set as their primary plan and both the Default Pricing and Customer Pricing 2019 plans set under the Customer Portal Plan option since these were the targeted plans when they booked their first trip.

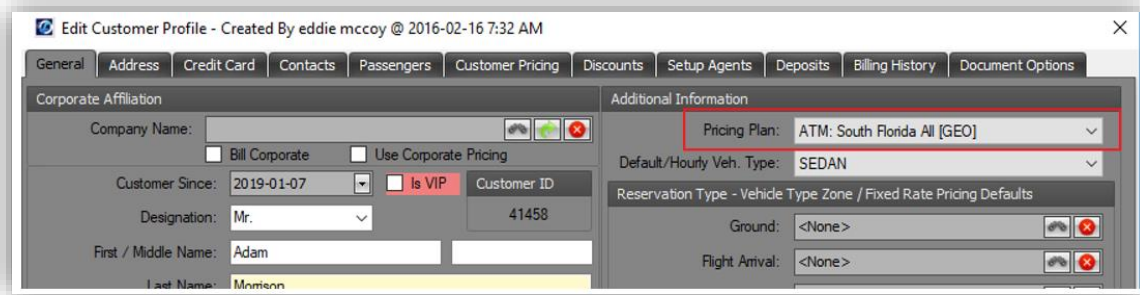
More details of these specific settings are below.



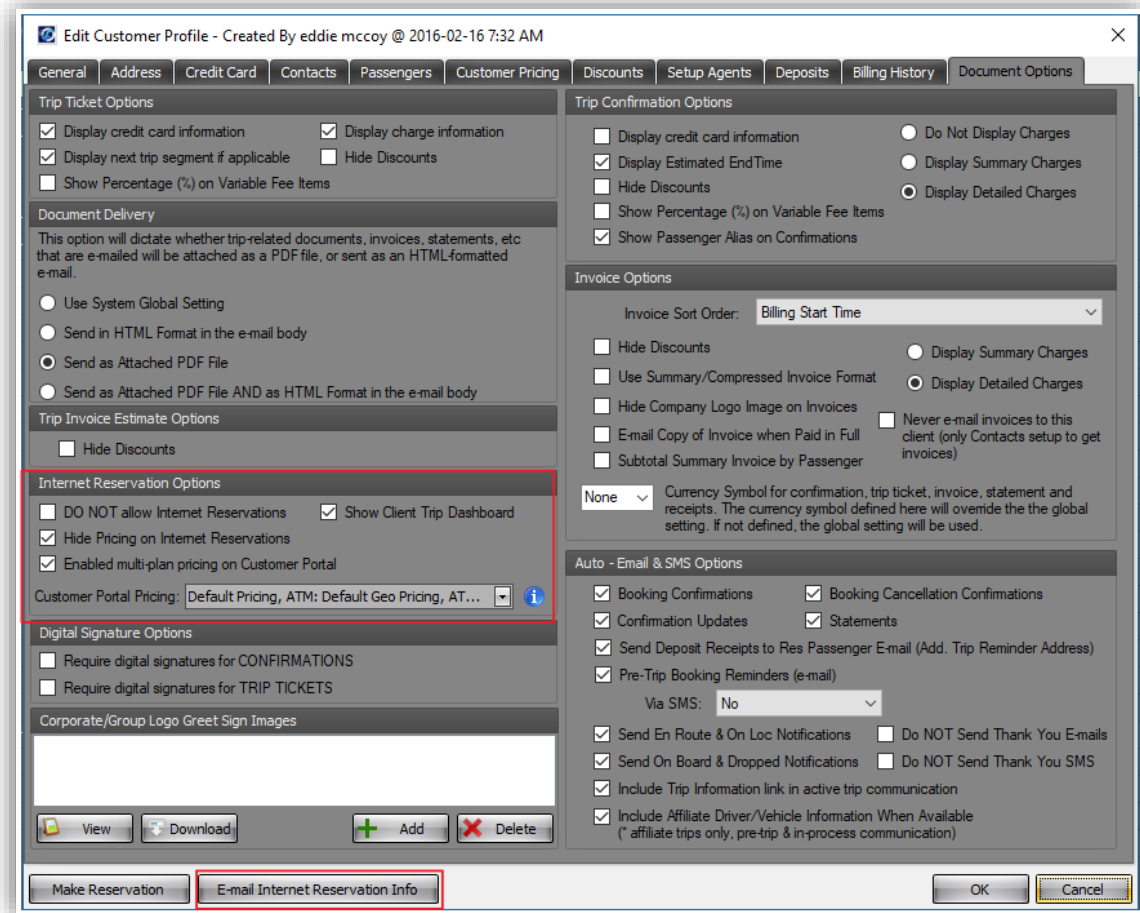
### Customer Profile Options

The primary pricing plan within the customer profile is the plan targeted by default internally **AND** the plan used within the Customer Portal **IF the Customer Portal options are not set.**

### Customer Default Pricing Plan (internal and/or default)



### Customer Portal Options





Within document options, there are several settings that dictate behavior in the Customer Portal. If the Enable multi-plan pricing on the Customer Portal option is checked, the portal will query one or more pricing plans, as selected.

Other options to note:

- DO NOT allow internet reservations is the option set by default based on a system setting. This setting enables/disables access by the user to the Customer Portal.
- Show Client Trip Dashboard enabled the dashboard link within the portal. If you are a subscriber to the FASTTRAK DriverApp, users can see real-time driver locations and trip information directly from the portal.
- If necessary and/or if not sent automatically, you can send your customer the Customer Portal link by clicking the Email Internet Reservation Info button.

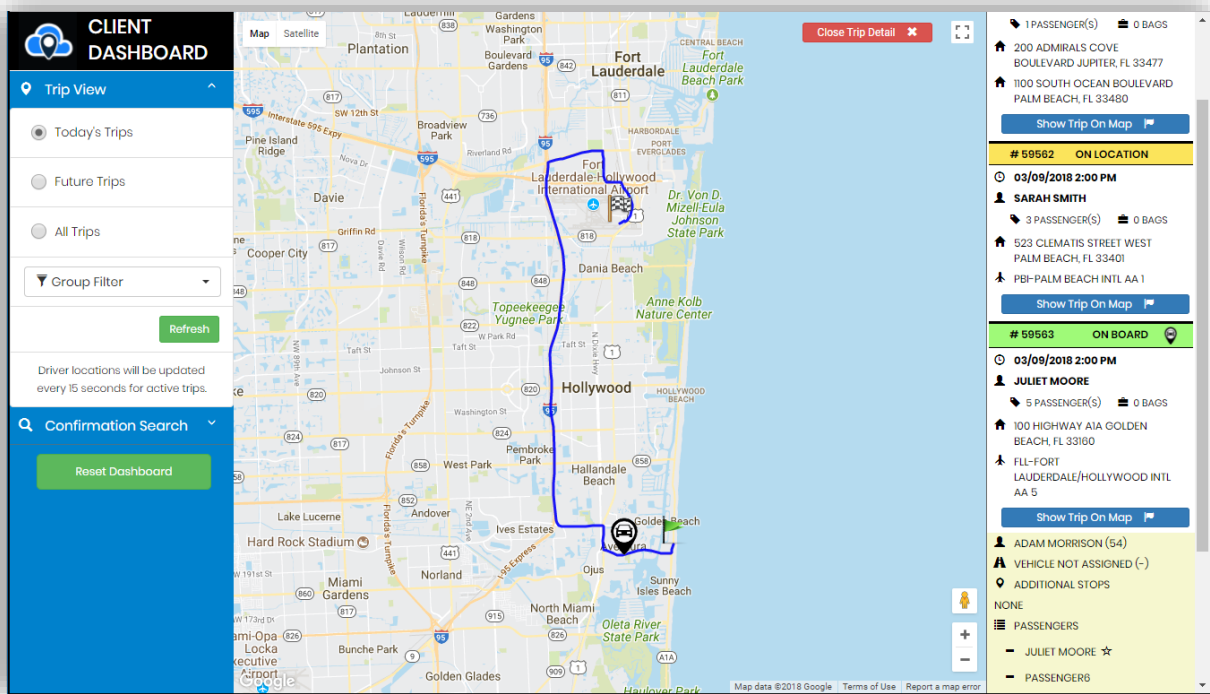
### Corporate Profile Options

Corporate pricing options are similar to the customer options. If a customer profile is set to Use Corporate Pricing, the corporate options will be used, and customer options are irrelevant.



## Portal Dashboard

If enabled in the customer or corporate profile, the Trip Dashboard link is shown in the portal. Clicking that link, opens the dashboard shown below.



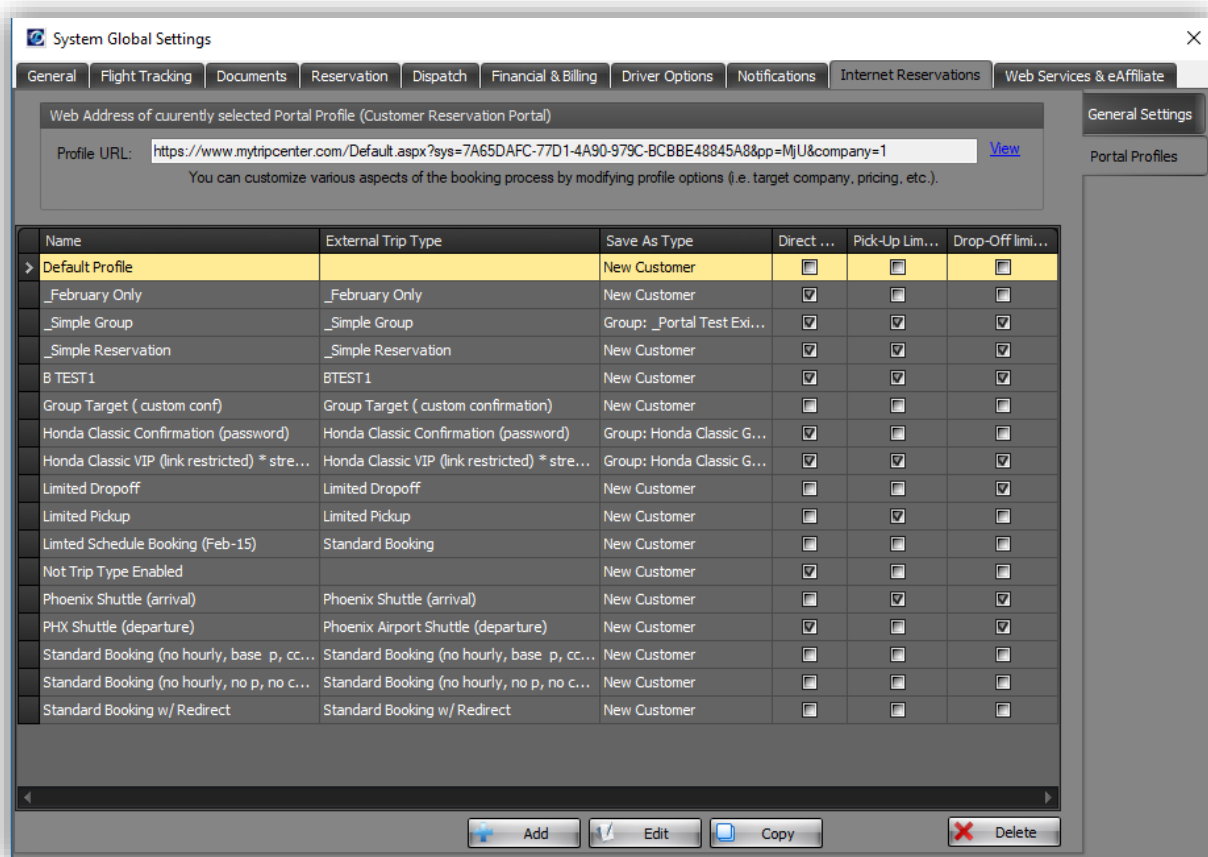
## General Features

- Show today's, future and all trips on the map
  - Pick-up/Drop-off location
  - Real-time driver location
  - Search by group name
- Search and show a trip by confirmation



## Custom Portal Profile Configuration

The Portal Profile tab allows access to the list of Portal profiles. From here, you can add, edit and delete portal profiles as necessary. Note: The default profile will always exist and cannot be removed.

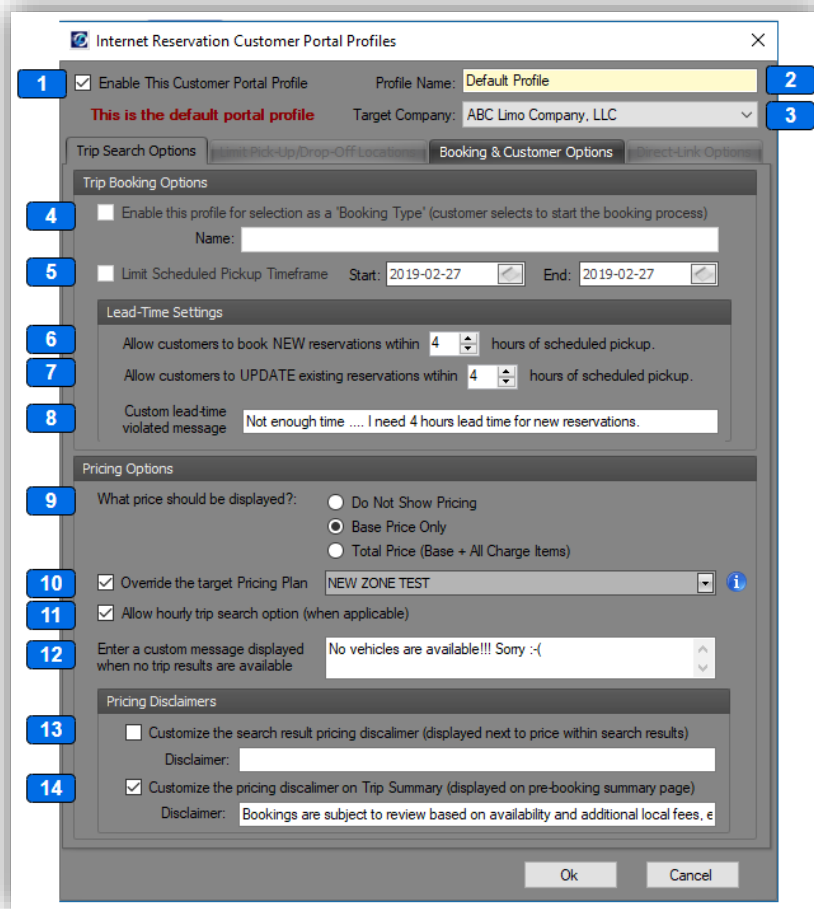


The Portal profile configuration is broken into 4 areas:

- Trip Search Options
- Limit Pick-Up/Drop-Off Locations
- Booking & Customer Options
- Direct-Link Options



### Trip Search Options



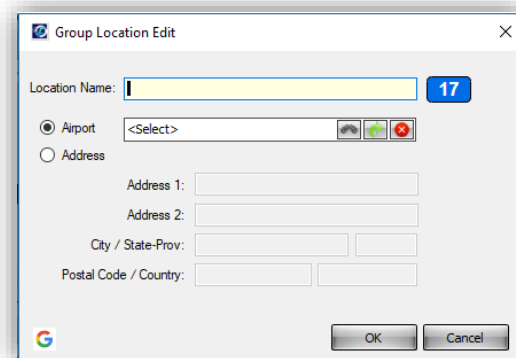
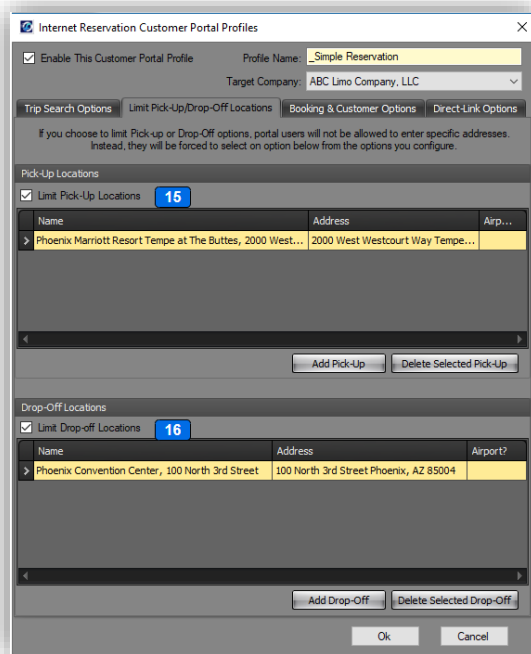
1. Allows you to temporarily disable access to the profile.	8. If a lead time is violated, you can customize the message here. Otherwise, a default message will be shown.
2. Internal name of the profile	9. Determines what price, if any, will be shown to customers on the vehicle/rate selection page.
3. Target company for branding, and default for new customers when using this profile.	10. Specifies the target pricing plan when targeting this profile. Note: See special <a href="#">pricing rules</a> , specifically with this setting.
4. If checked, this profile will be available for selection as a booking type within the default portal process.	11. If checked, hourly pricing will be used to search target pricing plans.
5. If checked, bookings using this profile must have a scheduled pickup within the selected dates.	12. If necessary, you can customize the message displayed when no results are returned.
6. Configures the number of hours required before the scheduled pickup date for New bookings.	13. If checked, you can customize the disclaimer shown on <i>search results</i> . If unchecked, a default message is shown.
7. Configures the number of hours required before the scheduled pickup date for modifying existing bookings.	14. If checked, you can customize the disclaimer shown on <i>booking summary</i> . If unchecked, a default message is shown.





## Limit Pick-up/Drop-Off Locations

If you chose to limit pick-up/drop-off locations, the user will be presented a select list on the trip search page. Otherwise, the user will have the ability to enter free text and lookup using Google address autocomplete.



- |  |
|--|
| 15. You can limit the pick-up options available to the customer by checking Limit Pick-Up Locations checkbox. Once checked, you will be required to add one or more options.   |
| 16. You can limit the drop-up options available to the customer by checking Limit Drop-Up Locations checkbox. Once checked, you will be required to add one or more options.   |
| 17. When clicking add/edit option, you will be required to specify an address or airport location. The "Location Name" value is the value that will be displayed to the customer, regardless of the airport/address entered. |



## Billing and Customer Options

You can choose to save booking in your database as new or existing customer profiles or under a target group as a group passenger. These settings below are specific to each one of those options.

**Important note:** New and existing customer options (18-22) are only valid for new/unauthenticated customers that have NOT logged into the portal.

18. If selected, new customers bookings will be saved under a new customer profile. This is similar to the current default booking process.
19. For new customer profiles, the target corporate affiliation can be set if necessary.
20. If selected, new customer bookings will be saved under an existing customer profile.
21. If selected, new customer bookings will be saved as a passenger within a target group.
22. If the group option is selected, you can choose to send an email confirmation when complete. If unchecked, no email is sent, and the customer is simply shown a confirmation page online.
23. If checked, a credit card will be required when new customers book. Note: If an existing customer books, customer and corporate account settings dictate whether a credit card is required.
24. If checked, new users will have the ability to enter email/password account information, so they can login and manage bookings in the future.
25. If entered, this message will be display on the Passenger Information page Pick-up Notes section.
26. If entered, users will be given the option to return to the redirect link instead of the default reservation list page.



## Direct-Link Options

Internet Reservation Customer Portal Profiles

Enable This Customer Portal Profile    Profile Name: \_Simple Reservation  
Target Company: ABC Limo Company, LLC

Trip Search Options    Limit Pick-Up/Drop-Off Locations    Booking & Customer Options    **Direct-Link Options**

If you enable the direct link, you will have the ability to send customers directly to this customized profile.

Profile Link

**27**  Allow access to this portal profile via a specific profile link

Profile Link Availability Settings

**28** Customized Link:  [view](#)

**29**  Limit Booking Link Availability    Start:     End:

**30**  Require Password to Access Link   

Ok    Cancel

- |   |
|---|
| 27. If enabled, you will have the ability to target this profile via a custom link. This link will bypass the login page (assumes a new user) and begin the booking process using this portal profile.  |
| 28. This is the custom link for this Portal Profile. This is the same link shown on the Portal profile list page when the profile is selected.  |
| 29. If checked, the portal will validate that the link was accessed within the date range. This does NOT have any impact on the scheduled pickup date and only limits link accessibility. If the link has expired, a message will be displayed to the user. |
| 30. If checked, users will be required to enter a password when accessing via the link. If the password is invalid, a message will be displayed to the user.  |



## Custom Website Portal Integration

There are a variety of integration options with FASTTRAK. Some of these options are described below.

### Add a link to your website; hyperlink, menu option, button, etc.

Using a link, this can target the login page (default link), search page (bypass login for new users), customer portal profile (direct link option), etc. The various links are available within the Global System Settings and Portal Profile configuration.

### Add a login form to your site

You can add a form on your site that allows a user to enter username/password. This allows styling and flow specific to your site. Once entered, simple HTML form programming will pass this information to the Customer Portal and autologin to the Customer Portal. Once logged in, the customer is on the Customer Portal and no longer on the operators web site.

See [Setup and Configuration Instructions](#).

### Imbedded Customer Portal (iframe)

The customer portal can be run within an existing site using an iFrame control. This will allow customers to directly interact with the customer portal without loading a new website address.

**Note: Someone with knowledge of HTML markup and potentially client-side JavaScript will be required to implement the iframe control correctly.**

The example below is sample HTML markup to load the customer portal in an iframe, within another website.

```
<body>
  <div>
    <iframe
      src="https://www.mytripcenter.com/Default.aspx?sys=[SYSTEM_ID_FROM_FASTTRAK]&new=true
      &company=[COMPANY_ID_TARGET_FROM_FASTTRAK]" frameborder="0" allowfullscreen></iframe>
    </div>
  </body>
```

**Because the portal is running in your website, it is important to REQUIRE HTTPS when accessing your website. Although the portal will work with HTTP, this will NOT be PCI Compliant. If you are unable or don't have the ability to run your site under HTTPS, it is NOT recommended to use the iframe approach and FASTTRAK will not be held responsible for any issues that arise.**



PCI compliance requires feedback, showing that the site is secure, when entering credit card information. If a secure iframe runs within an unsecure website, the user will only see a non-secure dialog. Additionally, browser saved data mechanisms will not be allowed since the entire channel is not secure. Additional concerns include man-in-the-middle attacks which cannot be prevented in an unsecure scenario.

There are a variety of options to include the iframe control. It is up to you to decide whether you provide a login dialog on your site, then forward that information to the URL of the iframe. Alternatively, you can load the default mytripcenter.com URL (available in your FASTTRAK settings) to load a login page directly in the iframe. If you have any questions, please contact FASTTRAK support.

### API Integration

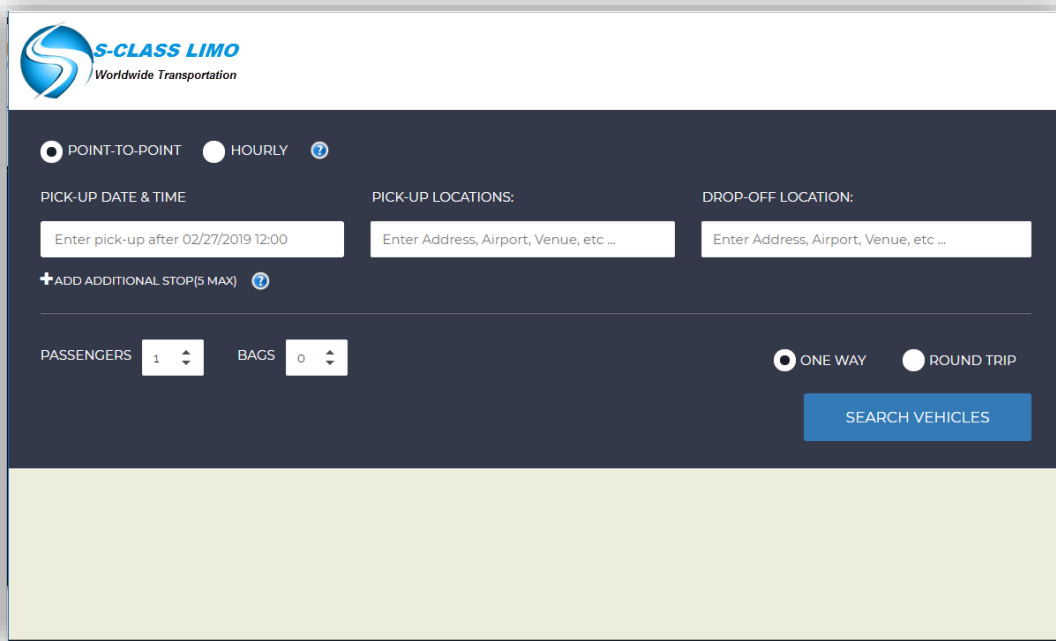
More advanced options are available using the FASTTRAK API. Contact [support@fasttrakcloud.com](mailto:support@fasttrakcloud.com) for more information on using the API to fully customize features of the customer portal. In this case, all user interactions would be using a website created by your developers using the FASTTRAK API.



## Appendix A – Customer Portal Screens



### Booking Screen





### Vehicle Type/Rate Selection Screen

**SELECT A VEHICLE**

	<b>SUV</b>	<b>\$12.00</b>
	Max 6 people per vehicle	<b>SELECT</b>
	Max 8 suitcases per vehicle	
	Estimated time 2 Hours	
	<b>SED - SCLASS</b>	<b>\$220.00</b>
	Max 3 people per vehicle	<b>SELECT</b>
	Max 4 suitcases per vehicle	
	Estimated time 1 Hours	

### Passenger Information Screen

**Passenger Information**

Please ensure all of the required fields are completed at the time of booking. This information is imperative to ensure a smooth journey.

FIRST NAME: Adam  
LAST NAME: Morrison  
CELL PHONE: 5612628378  
E-MAIL ADDRESS: adam@somewhere123.com  
GREET SIGN ALIAS: Adam M

**DEPARTING TRIP**

DEPARTING FROM: 1120 North Tatum Boulevard, Phoenix, AZ, 85028  
DEPARTING TO: Phoenix Sky Harbor Intl, AP, Delta Air Lines (DL), 1122

**ADDITIONAL ITEMS (ADDED TO RESERVATION)**

PAPER (\$6.00)  Small Animals (\$7.00)  WATER (\$5.00)

Pick-Up: REQUEST ADDITIONAL SERVICES OR SPECIAL NEEDS BELOW: Please knock loudly!  
Drop-Off: REQUEST ADDITIONAL SERVICES OR SPECIAL NEEDS BELOW: Help with bags to check-in please!

**GO BACK** **CONTINUE**



Billing and New Account Information Page (billing)

### Billing Information

<b>CREDIT CARD INFORMATION</b>	<b>BILLING ADDRESS</b>	<b>RESERVATION SUMMARY</b>
CREDIT CARD NUMBER*	STREET 1*	<b>Forward Trip Information</b>
<input type="text"/>	<input type="text"/>	DATE 02/28/2019 09:50
CARD HOLDER NAME*	STREET 2	FROM 11120 NORTH TATUM BOULEVARD PHOENIX, AZ 85028
<input type="text" value="Card Holder Name"/>	<input type="text"/>	TO PHX - PHOENIX SKY HARBOR INTL AP
EXPIRATION DATE*	CITY*	VEHICLE SED - SCLASS
02 <input type="text"/> 2019 <input type="text"/>	<input type="text" value="City"/>	CHARGE \$220.00
	STATE/PROVINCE*	(CHANGE VEHICLE)
	<input type="text" value="Select State"/>	<b>BASE CHARGE \$220.00</b>
	POSTAL CODE*	
	<input type="text" value="ZipCode"/>	

**NEW CUSTOMER INFORMATION**

Billing and New Account Information Page (continued)

### NEW CUSTOMER INFORMATION

The information below will be used to create your customer profile including your login email address.

FIRST NAME*	<input type="text" value="Adam"/>
LAST NAME*	<input type="text" value="Morrison"/>
PHONE*	<input type="text" value="561-555-1212"/>
EMAIL*	<input type="text" value="adam@somewhere123.com"/>
ACCOUNT PASSWORD*	<input type="password" value="....."/>
CONFIRM PASSWORD*	<input type="password" value="....."/>

Disclaimer Bookings are subject to review based on availability and additional local fees, early morning or incidentals requested service fees, may apply





### Reservation Summary

#### Reservation Summary

<b>Passenger Detail</b>		<b>Customer/Contact Information</b>	
<b>NAME</b>	Adam Morrison	<b>FIRST NAME</b>	Adam
<b>ALIAS</b>	Adam M	<b>LAST NAME</b>	Morrison
<b>E-MAIL</b>	adam@somewhere123.com	<b>E-MAIL</b>	adam@somewhere123.com
<b>CELL #</b>	561-555-1212	<b>PHONE #</b>	561-555-1212

<b>Billing Information</b>			
<b>CARDHOLDER</b>	Adam M Smith	<b>ADDRESS</b>	1234 Main Street
<b>CARD #</b>	xxxxxxxxxx22499	<b>CITY</b>	Phoenix
<b>EXPIRATION</b>	02/2024	<b>STATE</b>	AZ
		<b>ZIP CODE</b>	12345

<b>Departure Trip Details</b>	
<b>DATE</b>	02/28/2019 09:50
<b>PICK UP</b>	11120 North Tatum Boulevard, Phoenix, AZ, USA
<b>DROP OFF</b>	PHX - Phoenix Sky Harbor Intl AP
<b>VEHICLE</b>	SED - SClass

**DEPARTING TRIP DETAIL**

Base Rate: **\$220.00**

AIRPORT PARKING: **\$10.00**

ttttt: **\$26.40**

**Trip Total: \$256.40**

**Disclaimer:** Bookings are subject to review based on availability and additional local fees, early morning or incidentals requested service fees, may apply

[GO BACK](#) [FINISH](#)

**NEED HELP?**  
Call our customer service team at the number below to speak to one of our advisors.  
**Main:** 111-111-1111  
**Toll Free:** 800-222-2222  
**After Hours:** 444-444-4444