

# Secured Signing for FastTrack 360 User Guide

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## Secured Signing for FastTrack 360

Secured Signing the one stop Digital Signature solution that integrates with FastTrack360 (FT).

It allows you to send documents direct from FT via Secured Signing to be signed online by invitees (your clients, candidates, consultants and more).

Once the document has been signed, it will be saved in FT.

Thanks to this unique integration, it means you can complete the full cycle for signing documents within one system.

This guide will show you how to setup Secured Signing and FT to work together.

## Secured Signing for FastTrack 360 Setup

In order to have Secured Signing for FT360 please be sure your FT360 version is at least 11.36

How to get start

1. Contact your FT360 account manager to enable API in your environment.
2. Contact Secured Signing at [sales@securedsigning.com](mailto:sales@securedsigning.com) or by phone AUS 1800 305 175 NZ 0800 55 33 66 to create a Secured Signing enterprise account for your company.
3. Provide to Secured Signing a user in your FT360 to complete Secured Signing setup. The user has to have permission to manage the "User" and "Security". "User" permission is to create Web API user, and "Security" is to add permissions to Web API user.

*In case you are going to create the Web API user please provide the username and password for this user.*

4. Secured Signing in the setup will enable Secured Signing functions in Dashboard, Candidates, Client's contacts, and Job order.
5. Secured Signing will provide Enterprise account user admin to login to Secured Signing admin Portal. This user will be able to add more users/accounts to Secured Signing for FT360.

Each user login on FT360 who needs Secured Signing functionality, requires an account / user in Secured Signing.

## Create users in Secured Signing and Connect FT360 to Secured Signing

Secured Signing Admin User login to Admin Portal at

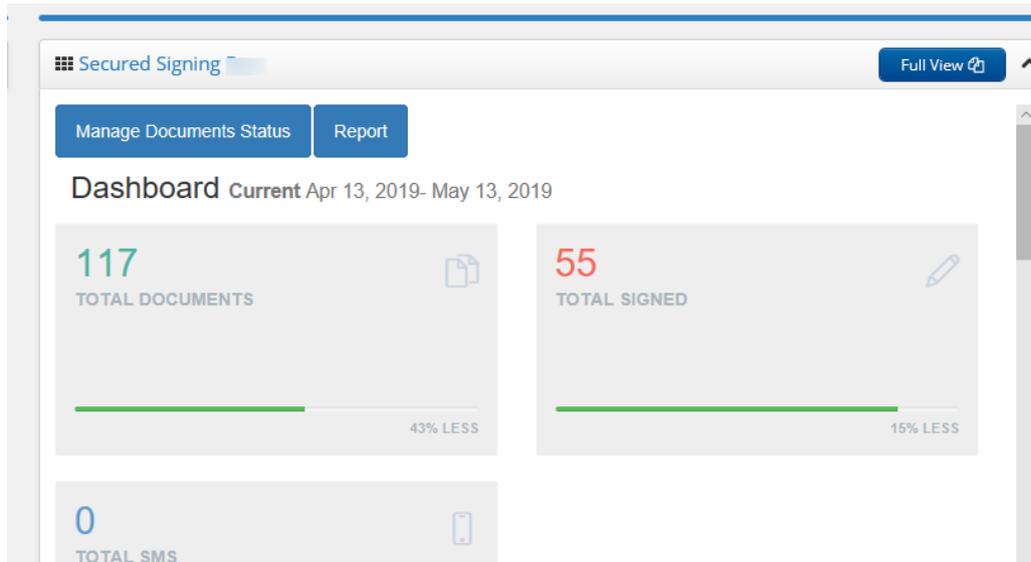
<https://www.securedsigning.com/Partners/Login>

please add a user/account as below

The screenshot shows the 'Add New Account' form in the Secured Signing Admin Portal. The form is divided into two main sections: 'Person Info' and 'Company'. The 'Person Info' section includes fields for First Name, Last Name, Email, and Job Title. The 'Company' section includes fields for Company Name, Legal Name, Street 1, Street 2, Postal/Zip Code, Branch Name, City, Country (set to NEW ZEALAND), State (set to AUCKLAND), and Phone. There are also dropdown menus for Groups and Country. The form is overlaid on a dashboard with a sidebar menu and a table of accounts in the background. Red arrows point to the 'Accounts' menu item (1), the 'ADD NEW ACCOUNT' button (2), and the 'ADD' button at the bottom of the form (3).

- ➔ New user will get an activation email to join to enterprise account and to create a password.
- ➔ New user must activate his Secured Signing account first before he can connect it to FT360.
- ➔ Once your account is activated, In FT360 go to dashboard and click on Secured Signing section on the bottom of the page.
- ➔ A pop up will ask you to use your Secured Signing username and password to authorise the connection between 2 systems and users.

Once the connection of the two systems is successful, a screen like that will show in the Secured Signing section in the FT Dashboard.



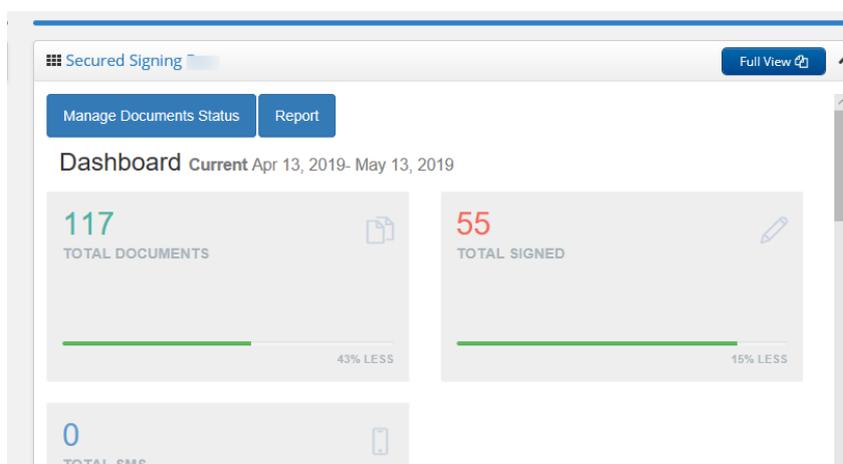
## Find the integration, where it is in FastTrack 360?

### Dashboard

Global view of your accounts within Secured Signing.

The Secured Signing section in dashboard shows you the current status of your account within Secured Signing in terms of number of documents send out last month and how many of them have been signed.

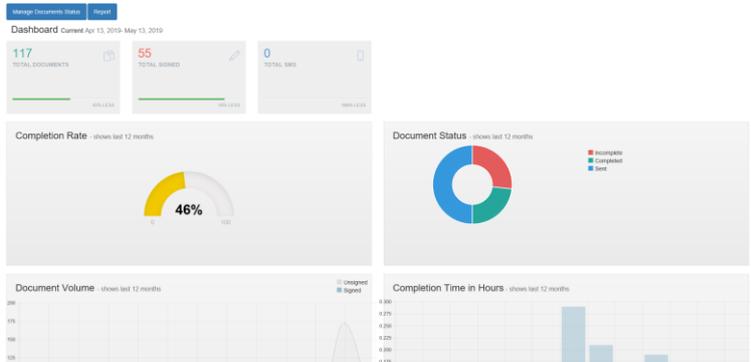
Also the number of SMS sent out and the success rate of documents completion.



### Full View

Open a new browser tab with global view of your account's status within Secured Signing.

Keep this tab open in order to manage and view document status in global view of this account.



### Manage Document Status

Global view of your document status, in progress or signed folder

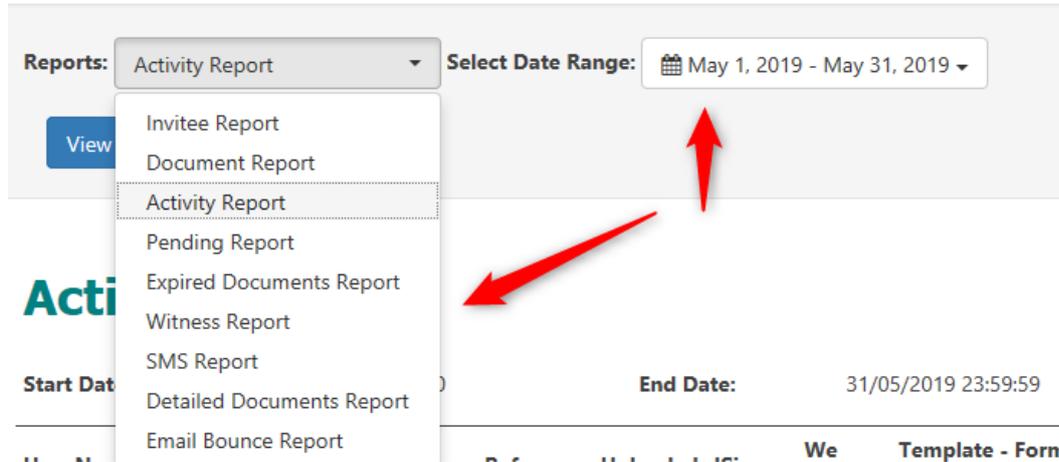
IN PROGRESS		SIGNED						Search	10	
Name	Invitees	Start Date	Due Date	Status	Last Signed	Actions				
<input type="checkbox"/> Get Started with Dropbox	Stu Wood	May 06, 2019 11:50 a.m.	May 13, 2019 11:50 a.m.	Expired	Not Signed	[Icons]				
<input type="checkbox"/> Get Started with Dropbox	Stu Wood	May 02, 2019 11:33 a.m.	May 09, 2019 11:32 a.m.	Expired	Not Signed	[Icons]				
<input type="checkbox"/> Get Started with Dropbox	Stu Wood	May 02, 2019 11:29 a.m.	May 09, 2019 11:29 a.m.	Expired	Not Signed	[Icons]				
<input type="checkbox"/> Get Started with Dropbox	Stu Wood	May 02, 2019 11:16 a.m.	May 09, 2019 11:16 a.m.	Expired	Not Signed	[Icons]				
<input checked="" type="checkbox"/> Stu_Wood	Stu Wood	Apr 24, 2019 03:27 p.m.	May 01, 2019 03:24 p.m.	Filling	Not Signed	[Icons]				
<input checked="" type="checkbox"/> Stu_Wood_NZ_IR330_-_Tax_code_declaration	Stu Wood	Apr 24, 2019 03:27 p.m.	May 01, 2019 03:24 p.m.	Filling Form	Not Signed	[Icons]				
<input checked="" type="checkbox"/> Stu_Wood_NZ_IR330C_-_Tax_rate_notification_for_contractors	Stu Wood	Apr 24, 2019 03:27 p.m.	May 01, 2019 03:24 p.m.	Filling Form	Not Signed	[Icons]				
<input checked="" type="checkbox"/> Stu_Wood	Stu Wood	Apr 24, 2019 03:24 p.m.	May 01, 2019 03:23 p.m.	Filling	Not Signed	[Icons]				
<input checked="" type="checkbox"/> [Redacted]	[Redacted]	Apr 02, 2019 12:18 p.m.	Apr 09, 2019 12:17 p.m.	Filling	Not Signed	[Icons]				
<input checked="" type="checkbox"/> [Redacted]	[Redacted]	Apr 02, 2019 12:19 p.m.	Apr 09, 2019 12:17 p.m.	Filling	Not Signed	[Icons]				

You can manage signing process real-time online by clicking on the 'i' document status

All signed documents will be in signed folder for 7 days, once signed it will remove, however once the signing process has been completed the document will always be save back in FT360 system automatically.

## Reports

You can run reports on account level for time frame period and different activities



Sample for account activities report

Reports: Activity Report Select Date Range: May 1, 2019 - May 31, 2019

View Export

### Activity Report

Start Date: 01/05/2019 00:00:00 End Date: 31/05/2019 23:59:59 User: [Redacted]

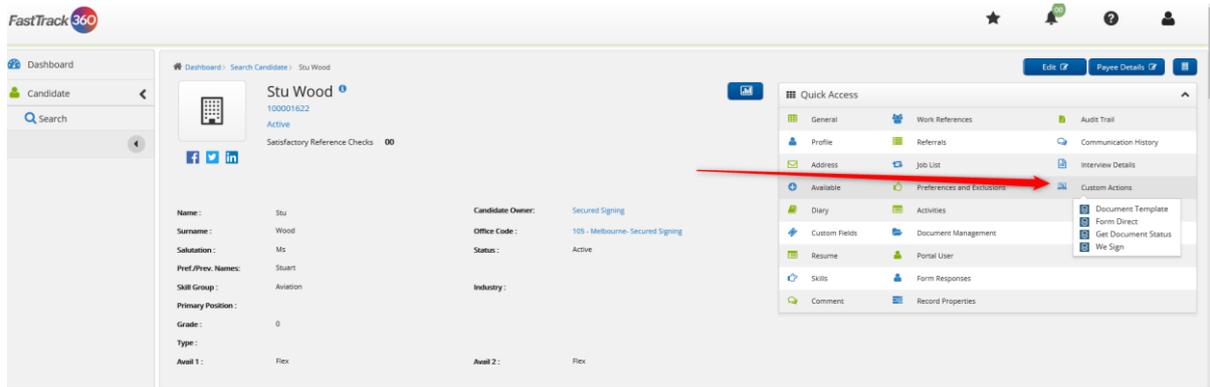
User Name	User Email	Branch Name	Reference	Uploaded	ISign	We Sign	Template - Form Filler	Form Direct	Document Total	Document Signed
[Redacted]	[Redacted]	[Redacted]	[Redacted]	10	0	10	0	6	16	8
Report Created On: 13/05/2019 14:55									Total Accounts:	1
									Total Documents:	16
									Total Documents Signed:	8

All reports can be exported to PDF and Excel.

## Candidate

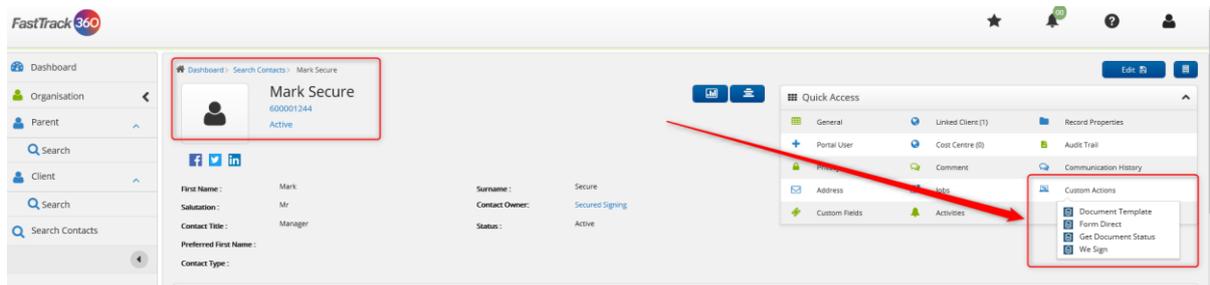
Search the candidate you want to send paperwork to.

Click Custom Action and select the Secured Signing process you want to perform, such as We Sign, Document Templates, Form Direct, and Get Document Status.



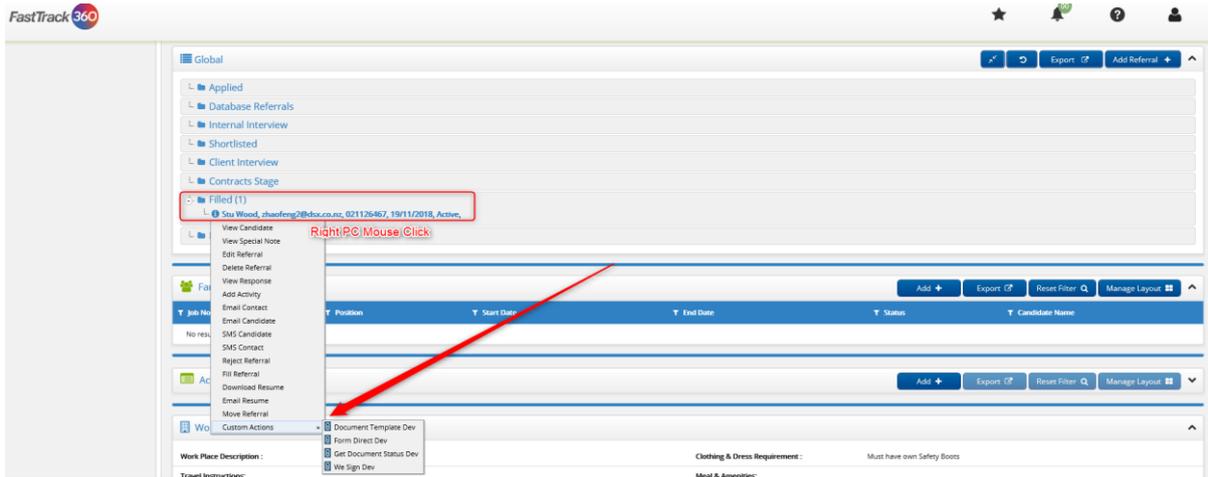
## Client Contact

Search for the client contact and click on Custom Actions to select the Secured Signing process you want to perform, such as We Sign, Document Templates, Form Direct, and get document status.



## Job Order

Go to Job Order and then referral workflow, right PC Mouse click on the candidate assign to this job and click on Custom Actions to select the Secured Signing process you want to perform, such as We Sign, Document Templates, Form Direct, and get document status.



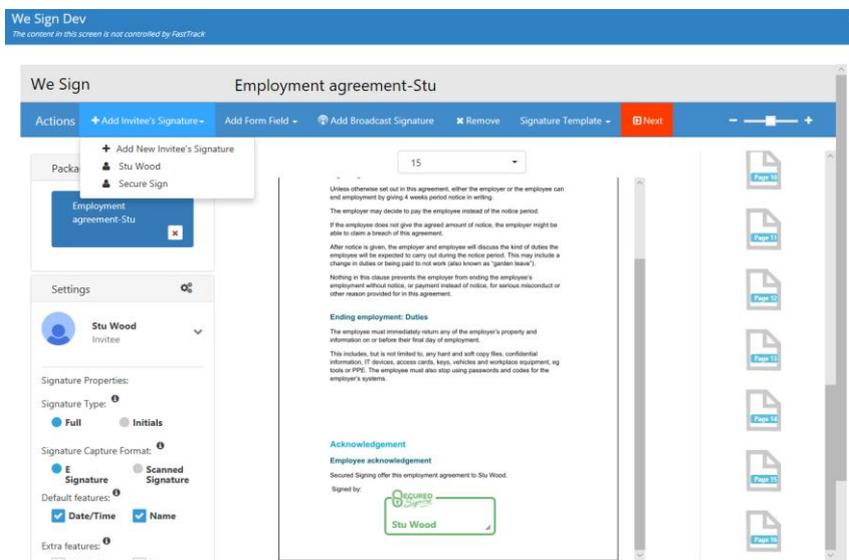
## We Sign

Invite other people to sign Docx, Doc, ODT, ODS, Xls, Xlsx, RTF & PDF documents

For many businesses signing employment agreements, paperwork, client's terms of business, or obtaining customer signatures in order to close a deal or on-board new employee often proves challenging. The traditional paper process is often time consuming and costly and may take a few days or several weeks to complete. With Secured Signing technology you will be able to close deals and sign documents within minutes.

Simply create your document, add it to Secured Signing Service and invite your business associate, customers, candidates, suppliers, partners or others to sign.

Click on We Sign to upload a document from your desktop and then position signatures for candidate and for user login or add anyone who is not in FT360 record.

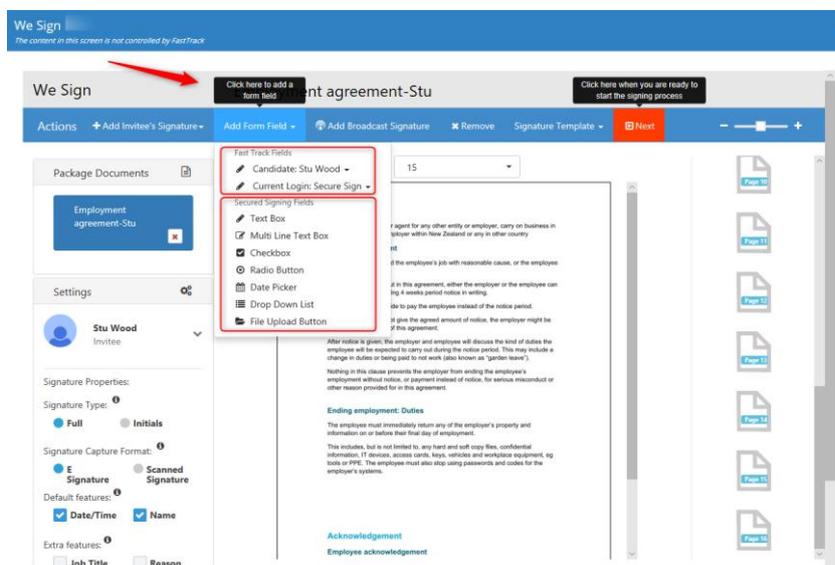


For more info about secured signing We Sign Process have a look at our We Sign Videos at <https://www.securedsigning.com/support/demo-videos/>

The signed document on signing process completion will save back in FT360 as part of the integration.

## Add Form Fields

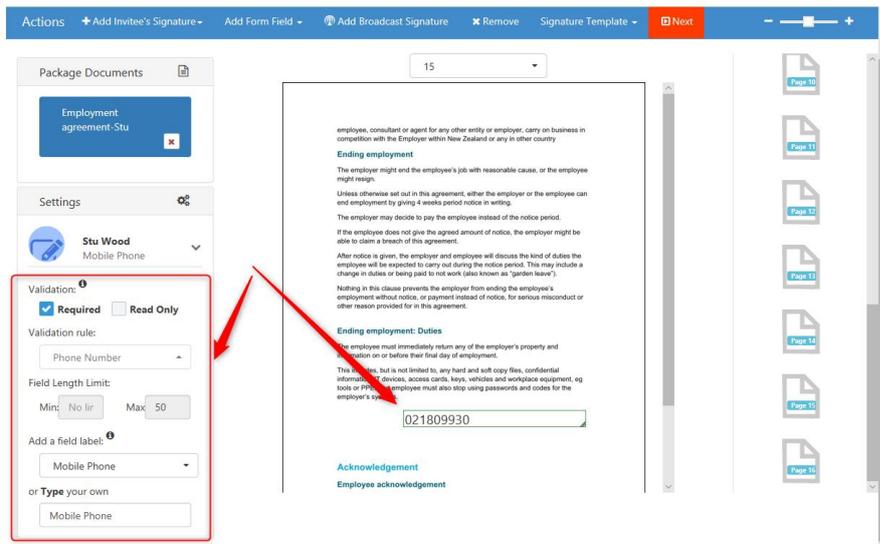
In We Sign process you can add one off form fields. You can select from 2 group: Fast Track database or create your own using Secured Signing form fields.



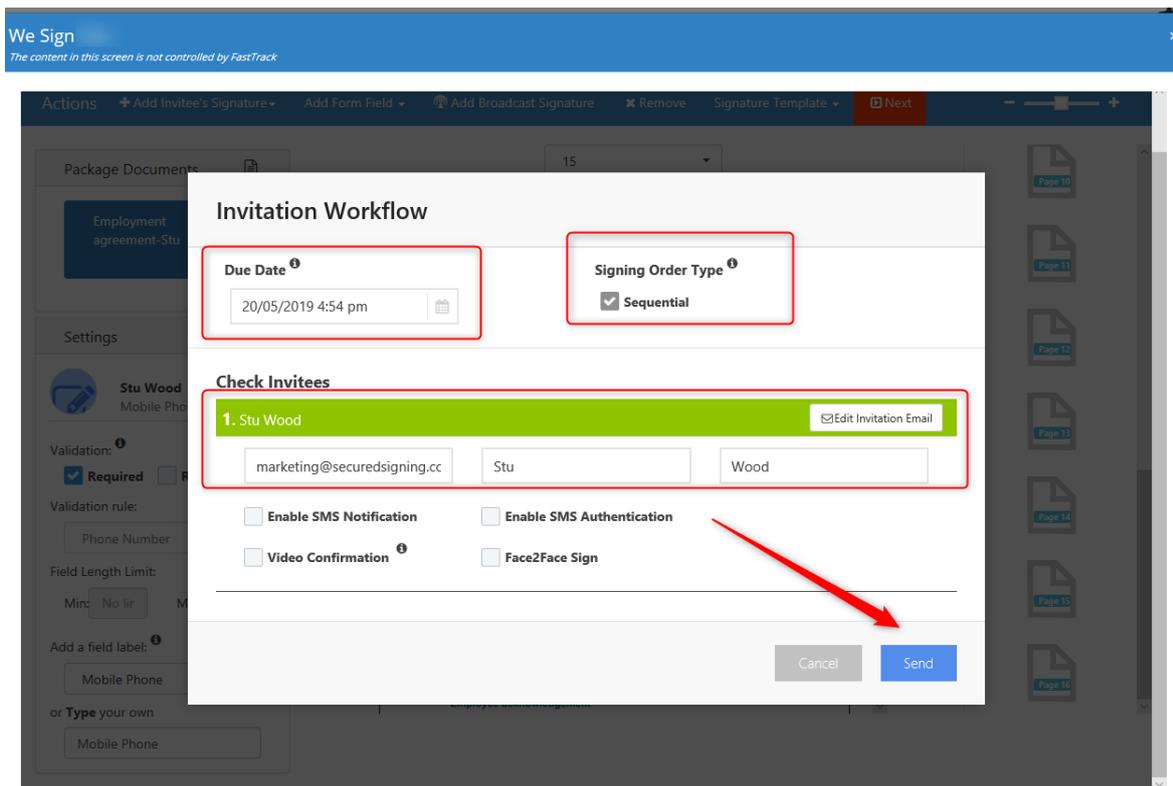
Fields with a value in Fast Track database will auto populate in the field. Once document has been filled and signing on completion the form fields will auto update Fast Track database.

Please setup the fields setting, label, validation, required etc, fields will grab some FT360 rules to apply to this field such as validation, fields length.

You set up read only means invitee can't change the fields value in FT360.



Press Next to send out email invitation with signing order and signing due date



## Packaging – send multiple documents

To create We Sign package, multiple document to send to same invites, just upload multiple document in one go, select the documents you want to upload from your desktop, and the system will take you to add signature's invites to each document.

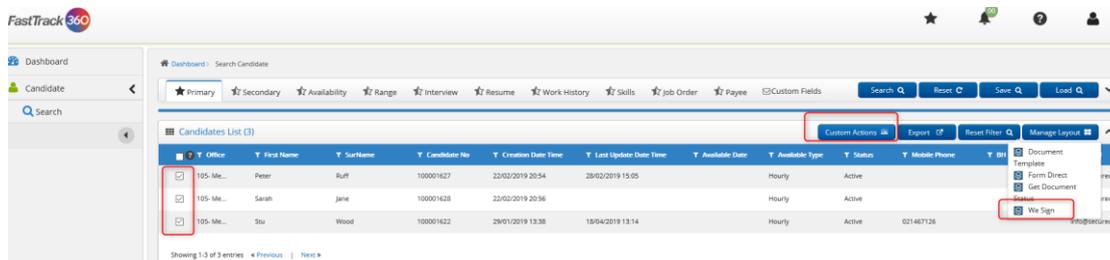
Invitee will receive one email invitation to fill-in and sign all documents. Once signing process completed FT360 database will update and signed documents will save in FT360 records.

## Broadcasting

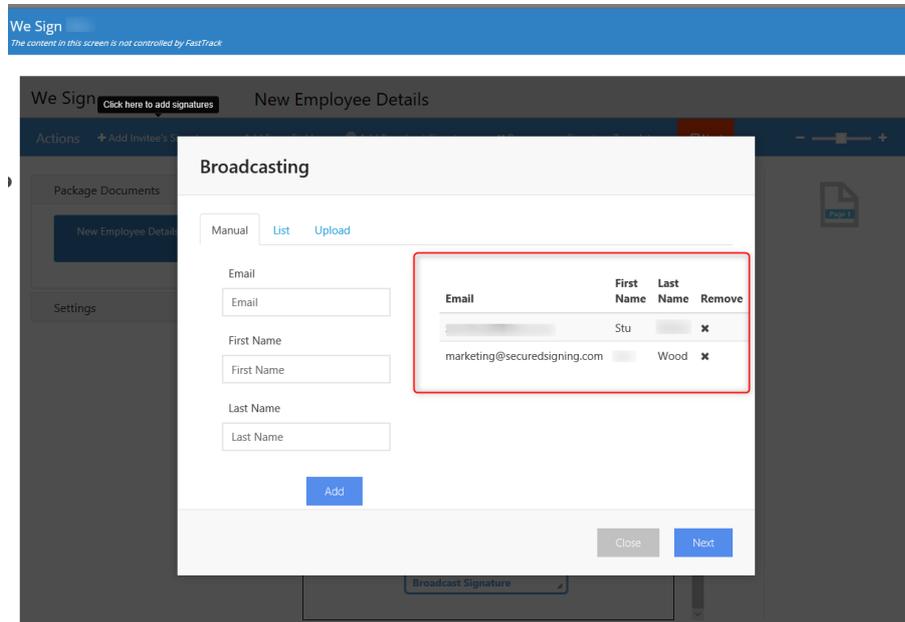
Need to invite a list of client’s contacts or candidates to sign a document? Broadcasting allows you to do it with just a click of a mouse!

With this innovative feature, you can invite all customers / shareholders / employees/ candidates to promptly fill-in and sign documents.

In the broadcasting you can select multiple candidate to send to all of them same document to be sign by each of them, for that you need to select multiple candidates from FT List



Press next to send invitation to each of the invitees/ candidates. All invitees information is taken from FT360. You don’t need to enter any info, however you can add manually invitees that are not in the list.



Once the signing process is completed FT360 database will update with new forms fields and signed document will saved back in candidate / FT 360 records.

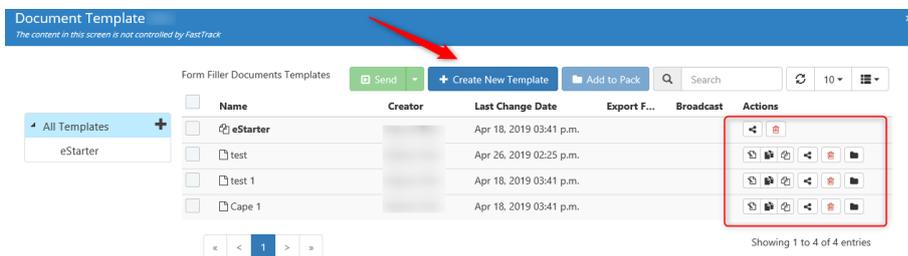
## Document Templates – Form Filler

Completing and signing forms are daily routine for many businesses, with most documents in PDF format. Until now, you were required to print the forms after filling in all fields with your details, then sign and send manually by post, fax or by scanning it back to an electronic format. This manual and cumbersome process is no longer necessary with the online, automated solution Secured Signing offers!

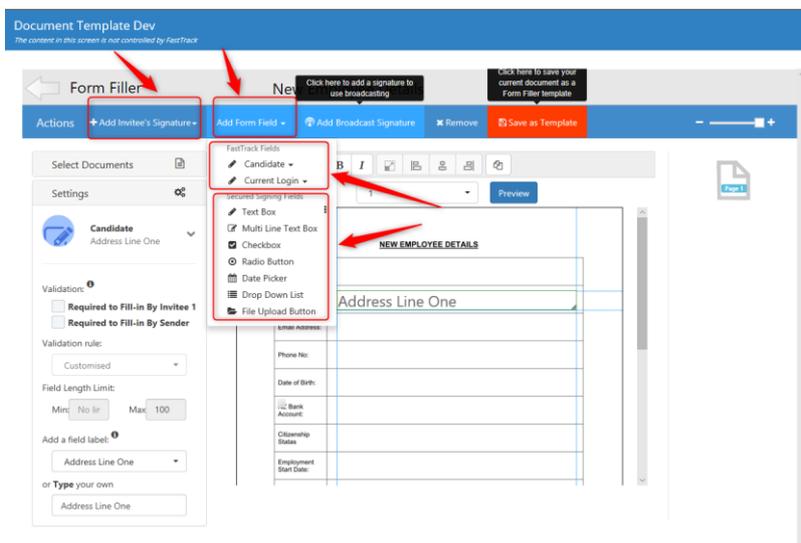
With our Secured Signing DIY Form builder (Form Filler) solution you can fill in any form and sign it with just your mouse and keyboard! Simply pinpoint fields on the form with the appropriate details you want to add, and sign.

## Create New Template

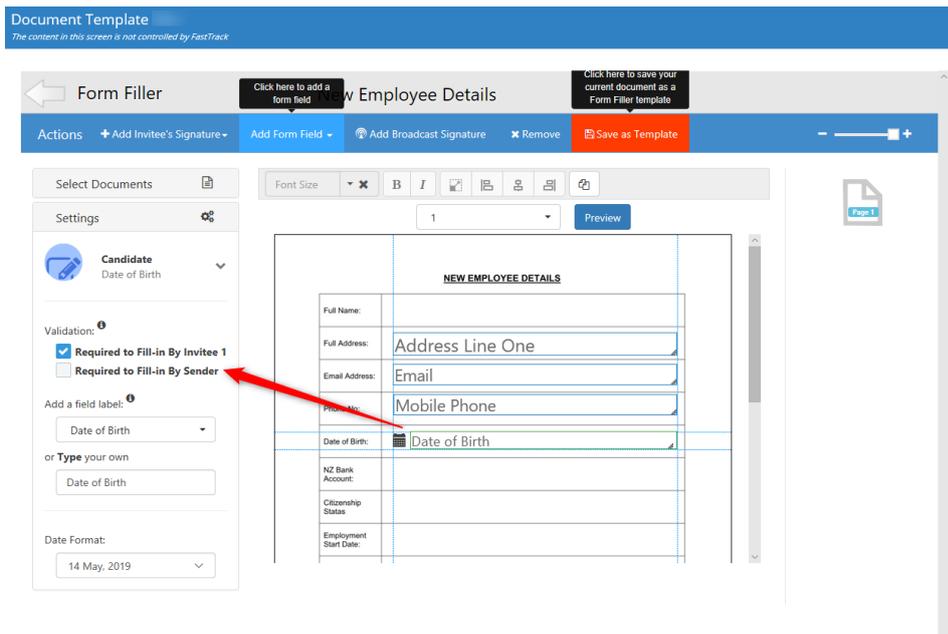
To design your new template, click create new template and upload a document form your desktop



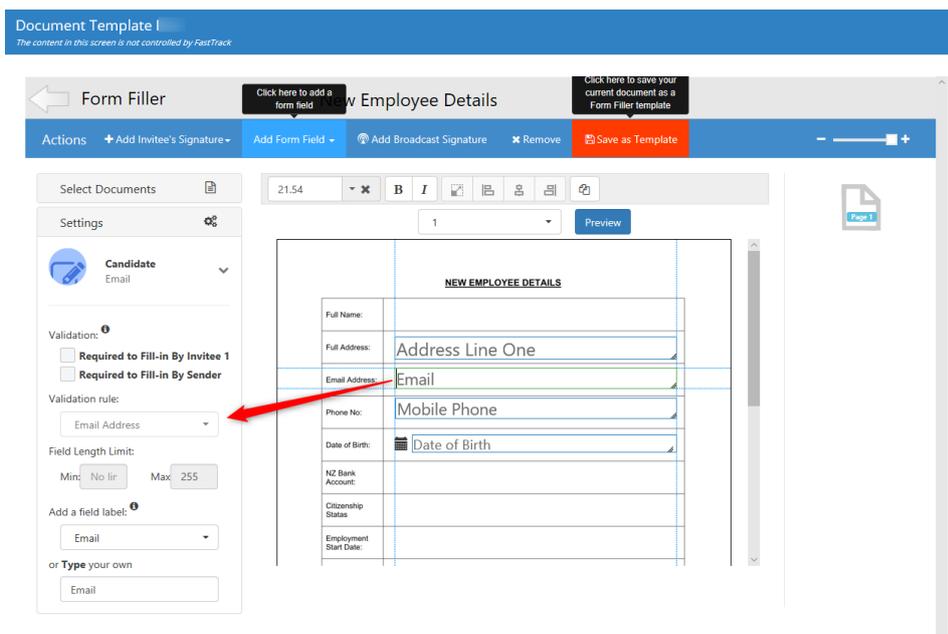
Add signatures for invitees, Fast Track’s form fields, Secured Signing Form Fields.



Each Field can setup as mandatory fields, means must to be filled before signing.



Set up validation for each field, some of the validation will auto forced from FT360 system

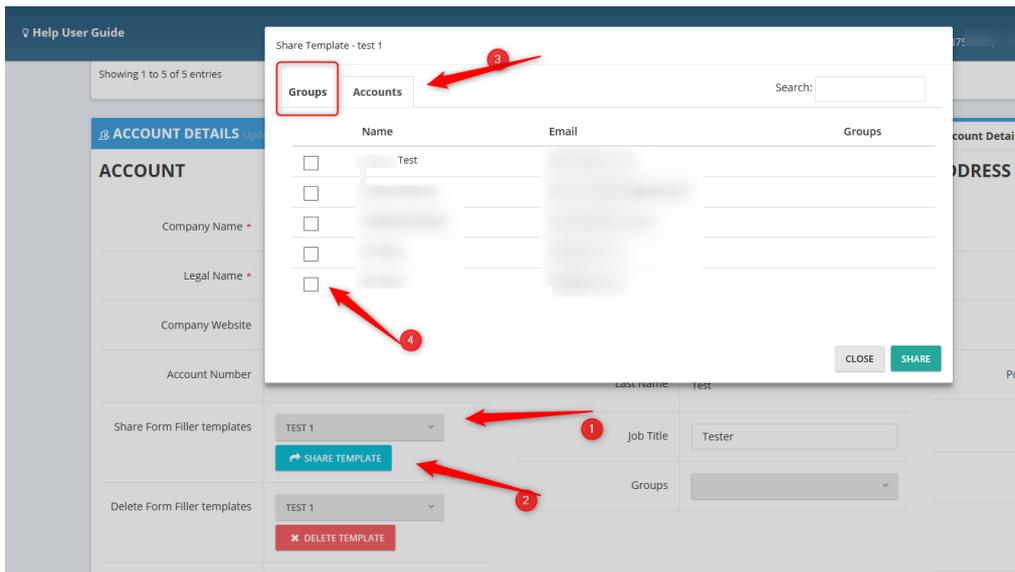


For more information how to build you templates in Secured Signing form Filler look at our full user guide at [https://www.securedsigning.com/Help\\_User\\_Guide.pdf](https://www.securedsigning.com/Help_User_Guide.pdf)

## Share Document Template

Share template can be done in Secured Signing admin portal. Secured Signing admin user needs to login at <https://www.securedsigning.com/Partners/Login>.

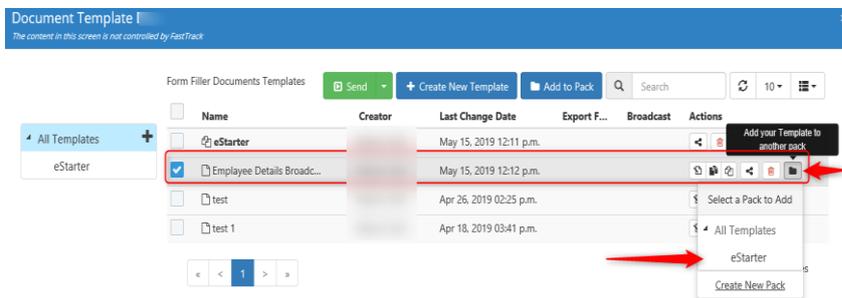
Go to the account and select the account who built the template.



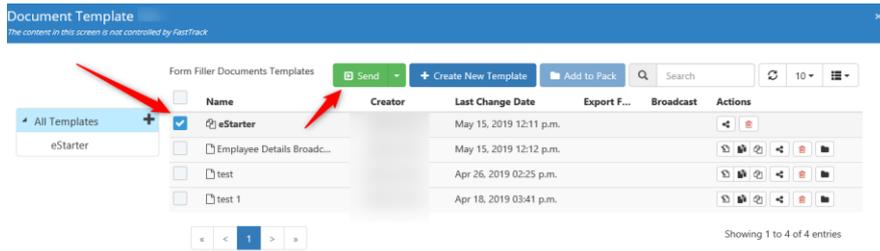
Select the template and share with another user or group. Once done it will appear in the templates list next time the user login to FT360.

### Create Template Pack

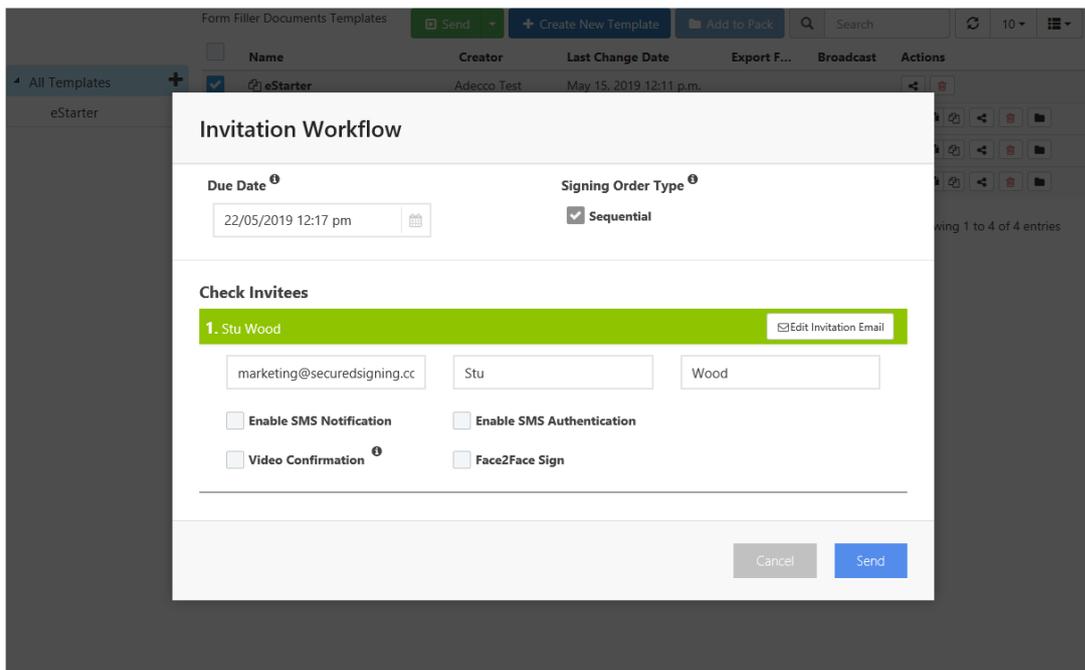
After creating templates, you can group them to a pack and multiple documents to invitee in one click.



Send a pack out, just click on the pack and press send, check the invitee information

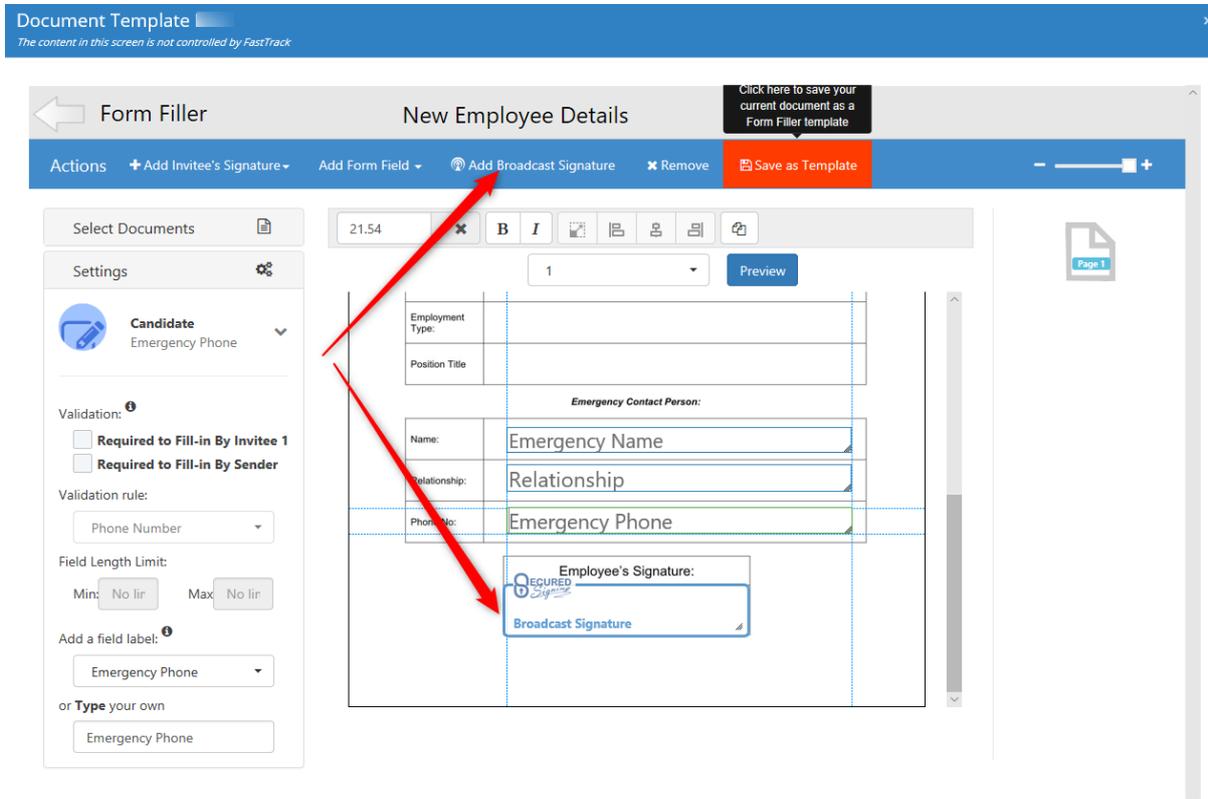


Document Template Dev  
The content in this screen is not controlled by FastTrack

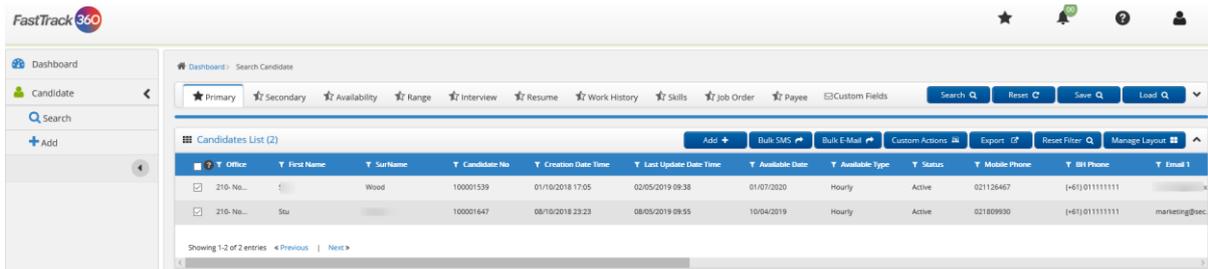


## Template Broadcasting

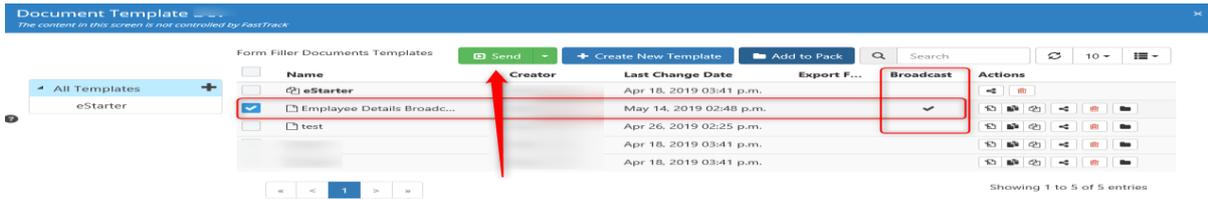
To create template that can send to multiple candidates/ invitees with a few clicks -> add broadcasting signature.



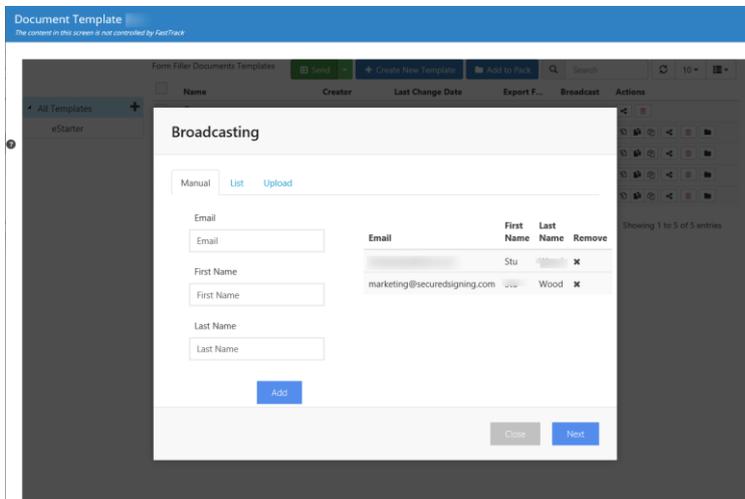
To send to multiple invitee's templates tick multiple candidates



Select the broadcasting template and press send



List of invitees will show up and just press next / send the invitations out



## Form Direct

Form Direct is a customised form build by Secured Signing team and will be available in Form Direct list within FT360. These forms are Mobile ready and supports complex validation process.

Out of the box Australian paid account will have Tax Declaration Form (TFN) and Super Choice forms.

Out of the box New Zealand customers will have IRD330, IRD330C ACC 6231 Pre employment Check, KS2, and KS10

If your business active in both countries, please contact us to enable all forms.

Form direct has setup cost, please contact us direct to discuss it further.

In Client Contact, Candidate or Job Order click on Custom Action and select Form Direct to get list of form available for you, you can tick more than one form to create a package. You can add attachment from document library such as polices or upload one off file for this signing process form you desktop.

The screenshot shows the 'Form Direct' wizard interface. At the top, a blue header reads 'Form Direct' with a close button. Below it, a grey bar also says 'Form Direct'. A progress bar contains five steps: 1. Select your forms (highlighted in blue), 2. Invite, 3. Email Template, 4. Setup workflow, and 5. Review. The main content area is divided into three sections:
 

- Forms:** A list of forms with checkboxes. Selected items include 'Application Form', 'NZ IR330 - Tax code declaration', and 'KiwiSaver Combined Optin or OptOut'. Other options include 'Individual Agreement', 'KiwiSaver Deduction Form - KS2', 'KiwiSaver OptOut Request - KS10', and 'ACC Pre-employment check'.
- Attachments:** A section with a 'Flyer' checkbox and a 'Work Smarter with Secured Signing' checkbox.
- Upload Additional Attachments:** A section with a text area for file details (valid formats: pdf, doc, docx; max size: 10MB) and an 'Add Attachments' button.

 At the bottom right, there is a 'Click here to continue wizard' link, a 'Previous' button, and a 'Next' button.

Press next and invitee details will auto populate from FT360.,  
 Select email template, setup in Secured Signing admin portal.

The screenshot shows the 'Form Direct' wizard at step 3: 'Email Template'. The progress bar now highlights step 3. The main content area is titled 'Email Template' and includes:
 

- Invitation / Completion:** A tabbed interface with 'Invitation' selected.
- Email Type:** Radio buttons for 'Personal' and 'Email Template' (selected). A dropdown menu shows 'Onboarding'.
- Subject:** A text input field containing 'Onboarding Documentatic'.
- Edit / Preview:** A rich text editor with a toolbar (bold, italic, underline, link, unlink, list, indent, text color, background color) and a preview area. The preview text reads: 'Hi Stu. We are pleased you have accepted our employment offer. Please follow the link to sign the remaining onboarding documents. [!SecuredSigningText]'.

 At the bottom right, there are 'Previous' and 'Next' buttons.

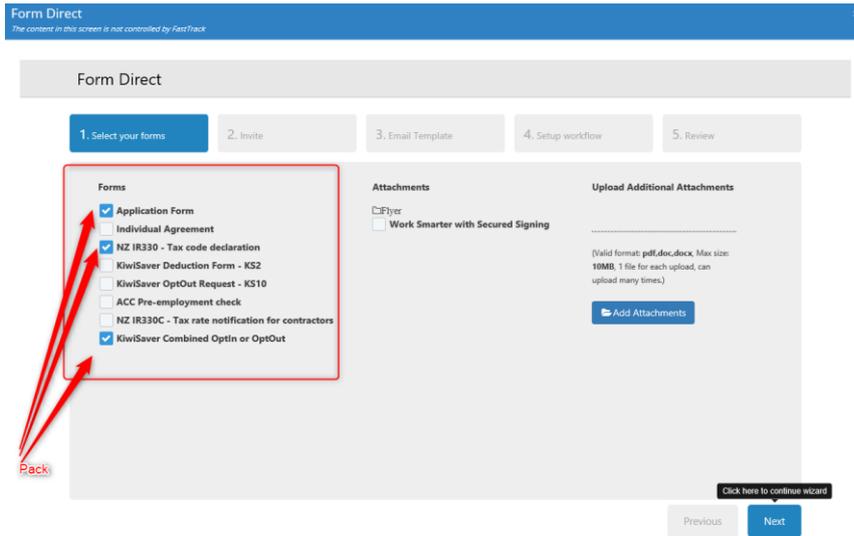
Set the signing workflow, in term of signing due date, add the notification parties if needed and press send.

Invitee will receive email invitation to fill-in the form and sign, all online on any device type.

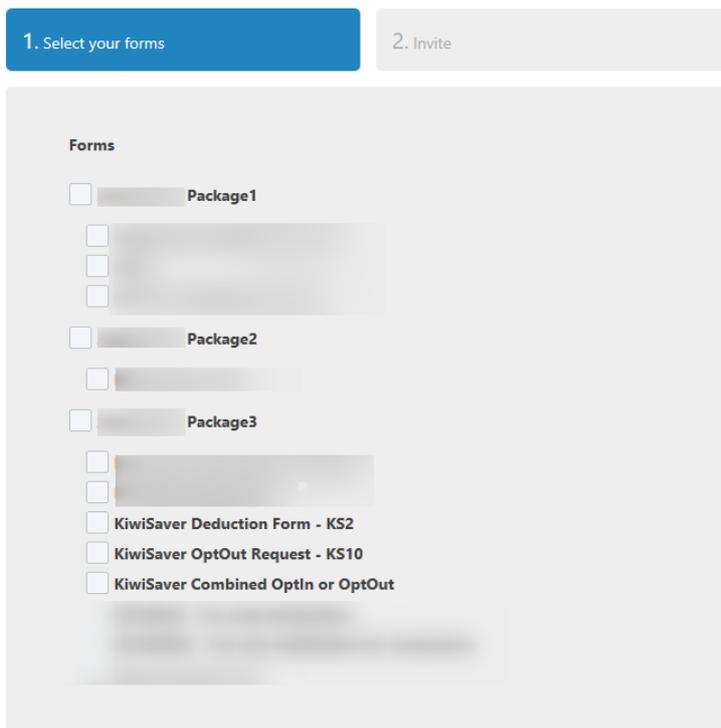
Once signing process has been completed, signed document saved in FT360, in the place it was originated, and all form fields that mapped will auto update FT360 database.

### Form Direct Packaging.

To send multiple forms in one email invitation just tick multiple form and we will send all of them in one go.

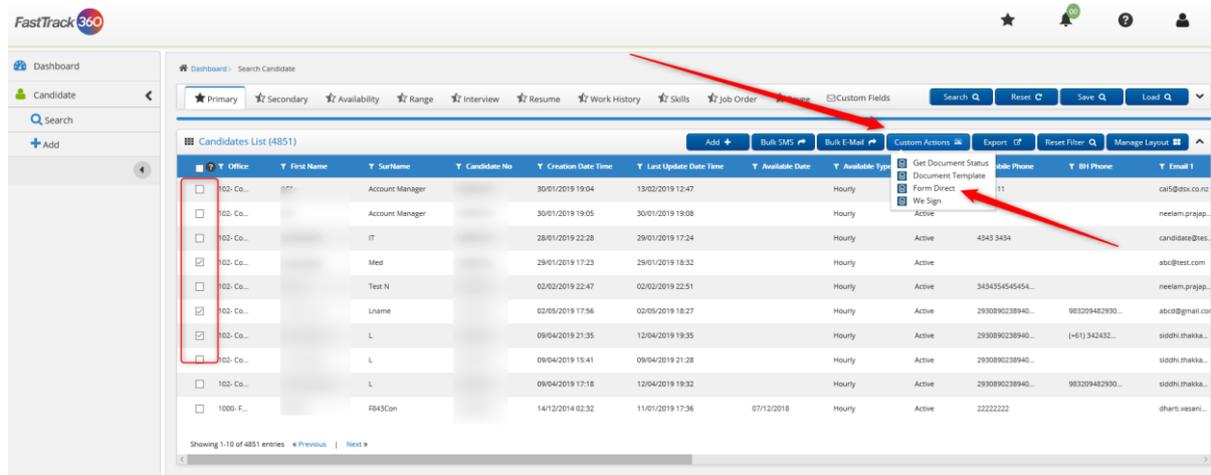


Please contact us if you want to group few forms in one pack and by selecting the group it will auto select all form in the pack to avoid recruiter forgot to send out one of the forms.



## Form Direct Bulk Sending

To send out same form direct or form direct package to multiple candidates ticked the candidate and click on Custom Actions

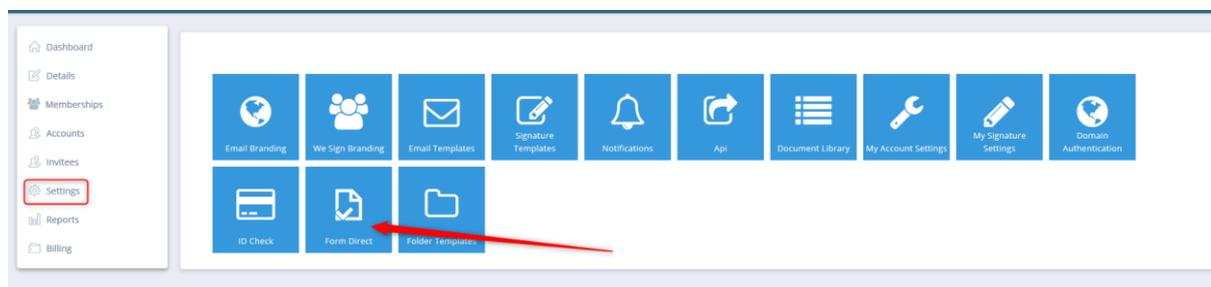


Then All invitees name will appear in the form direct process.

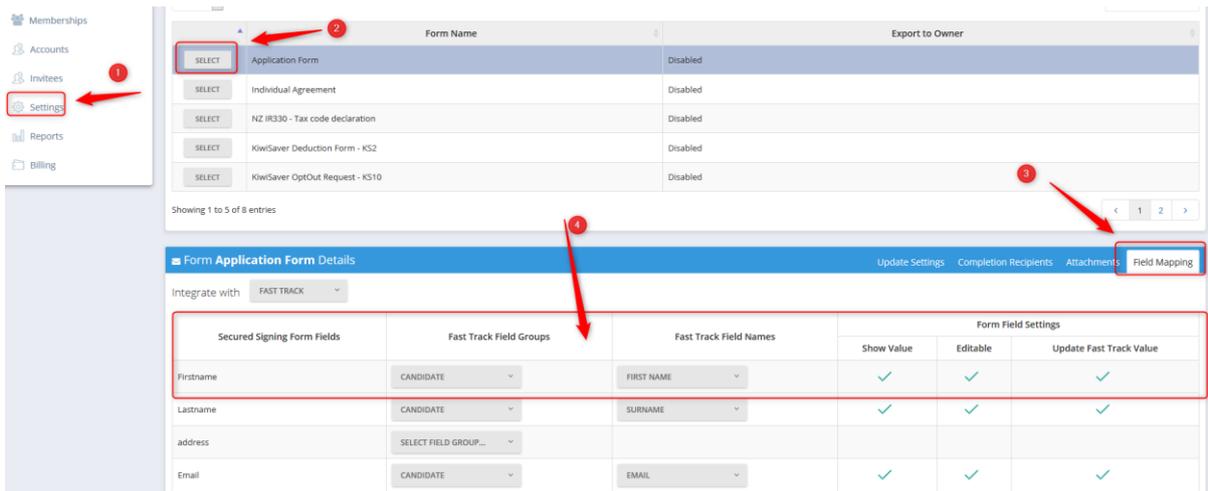
Each invitee will get invitee to sign his form direct pack, once signed document saved back in FT360 include updating form fields in FT360 database.

## Form Direct Mapping

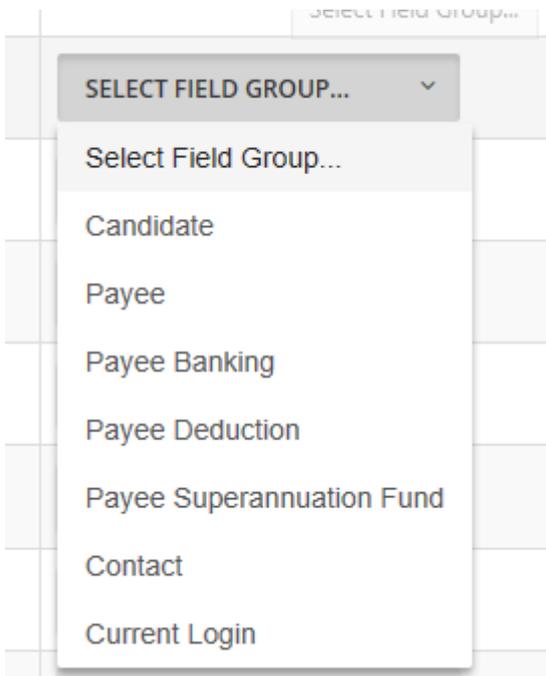
Secured Signing admin user needs to login at admin portal and go to setting from direct. Select the form.



In the selected form in the mapping you need to map the form fields in the form to FT360 fields.



You can map form field to following area in FT360



Each field you can set:

- Show Value – If FT360 has a value for this field show it to invitee while filling the form
- Editable – Invitee can edit the existing value.
- Update FastTrack Value – once signing process has been completed update FT360 with a new form filed data entered by invitee in the form filling process.

Secured Signing Form Fields	Fast Track Field Groups	Fast Track Field Names	Form Field Settings		
			Show Value	Editable	Update Fast Track Value
Firstname	CANDIDATE	FIRST NAME	✓	✓	✓

## Get Document Status

Get document status in Candidate, client and job order will show the current document status for this invitee only.

Click on Custom Actions and this window will showup

The screenshot shows the 'Get Document Status' window. At the top, there are two tabs: 'IN PROGRESS' (active) and 'SIGNED'. Below the tabs is a search bar and a refresh button. The main area contains a table with the following data:

Name	Invitees	Start Date	Due Date	Status	Last Signed	Actions
Employment agree...	Stu Wood	May 16, 2019 1...	May 23, 2019 1...	0 of 1 Signed	Not Signed	[Icons]
Stu_Wood	Stu Wood	May 16, 2019 1...	May 23, 2019 1...	Filling	Not Signed	[Icons]
Stu_Wood_KiwiS...	Stu Wood	May 16, 2019 1...	May 23, 2019 1...	Filling Form	Not Signed	[Icons]
Stu_Wood_NZ_IR...	Stu Wood	May 16, 2019 1...	May 23, 2019 1...	Filling Form	Not Signed	[Icons]

At the bottom of the table, there is a pagination control showing '1' and a message 'Showing 1 to 2 of 2 entries'.

It will show you the document in progress or signed.

Also, you can manage and view the signing process online in Realtime, by clicking on the 'i' in the grid, then you will be able to send manual reminder, extend due date and update names and email address in case of wrong spelling.

The screenshot shows the 'Stu\_Wood' document management window. It features a 'Due Date' field with a calendar icon and an 'Extend' button. Below this is a 'Candidate' section with input fields for email, name, and surname. There is also a 'Face2Face Sign' checkbox and 'Close' and 'Update' buttons at the bottom.