![agrē]

eSignature

eSignature is a premium module that allows a customer (or a trucker, or anybody) to sign an electronic copy of the document with an external signature pad, a mouse, or even a finger. Instead of printing, signing, photocopying, filing, and then trying to find it when you need it; you'll preview it, add an eSignature or two, and save it. It will always be available to you in agrē, and optionally available to your customers in *Grower Central*.

What you'll find:

Note	As what is displayed on each signature pad is different, the screenshots in this whitepaper were taken using Generic as the default device (as if you were signing on a laptop with a mouse or on a iPad with your finger)

Setup (one-time tasks)

Before you can start eSigning there are a few setup tasks that need to be completed – but they need to be done only once.

eSignature Client Installation

Each Windows computer running a **desktop** version of Citrix (including laptops and hybrid devices like the Surface Pro) requires a local installation of the eSignature client files.

These two client files need to be installed on *each* Windows computer that will be using eSignature:

1. FirmaCerta_SDK_Citrix_Client[4-0-2].msi[1]
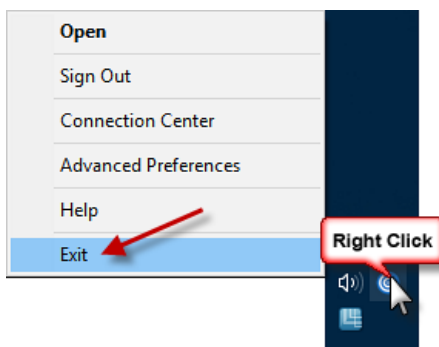2. FirmaCerta_TS.msi[2]

As new signature pads are released, these files will need to be updated/reinstalled occasionally to install the drivers to run the newer hardware.

If your device is running a **mobile** version of Citrix (as would most tablets including the iPad, and most cell phones/phablets) you *won't* need to install it.

eSignature is not supported for **OSx** (MacPro, MacBook Air).

Caution	Before installing the eSignature software please make sure both **agrē and Citrix are closed completely**.
	Closing Citrix via the X button in the top right hand corner merely minimizes the application. You need to **right click on the receiver icon in the system tray and select "Exit"** to close it down completely. This is so that after the signature pad driver installation is complete Citrix can properly map the devices.

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[1] You can navigate manually to: http://www.tronia.com/downloads/FirmaCerta_SDK_Citrix_Client[4-0-2].msi
[2] You can navigate manually to: http://www.tronia.com/downloads/FirmaCerta_TS.msi

Signature Pad Driver Installation

Recommended Wacom Signature Pads

Tronia supports only the following Wacom signature pads:

- Wacom STU-430
- Wacom STU-530 (discontinued but still supported)
- Wacom STU-540
- Wacom DTU1031X (discontinued but still supported)
- Wacom DTU-1141B

If you have chosen to use one of these external Wacom signature pads, the corresponding driver must be installed on *each* device that will be using it.

Caution	Before installing a signature pad driver please make sure both **agrē and Citrix are closed completely**. If Citrix is running during the installation, the signature pad may not be recognized by agrē.

Please know that because Tronia has not tested other signature pads we cannot guarantee their compatibility with agrē or Citrix, and therefore we are unable to provide support for them.

agrē Configuration Options

Company Config Options

Once Tronia has enabled *eSignature* in your agrē database, you'll see a new sub-tab under Reports. Choose the options that best fit the way your company will use eSignature.
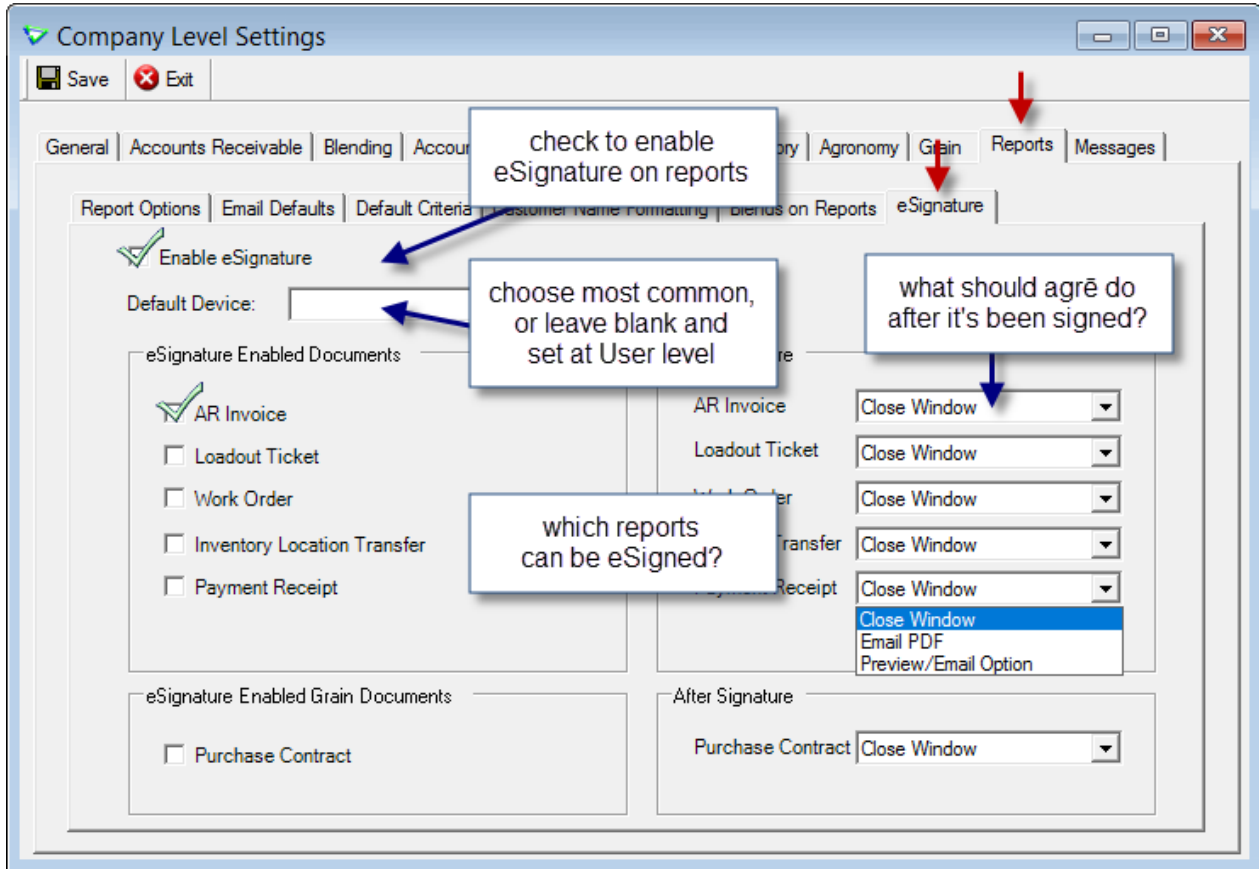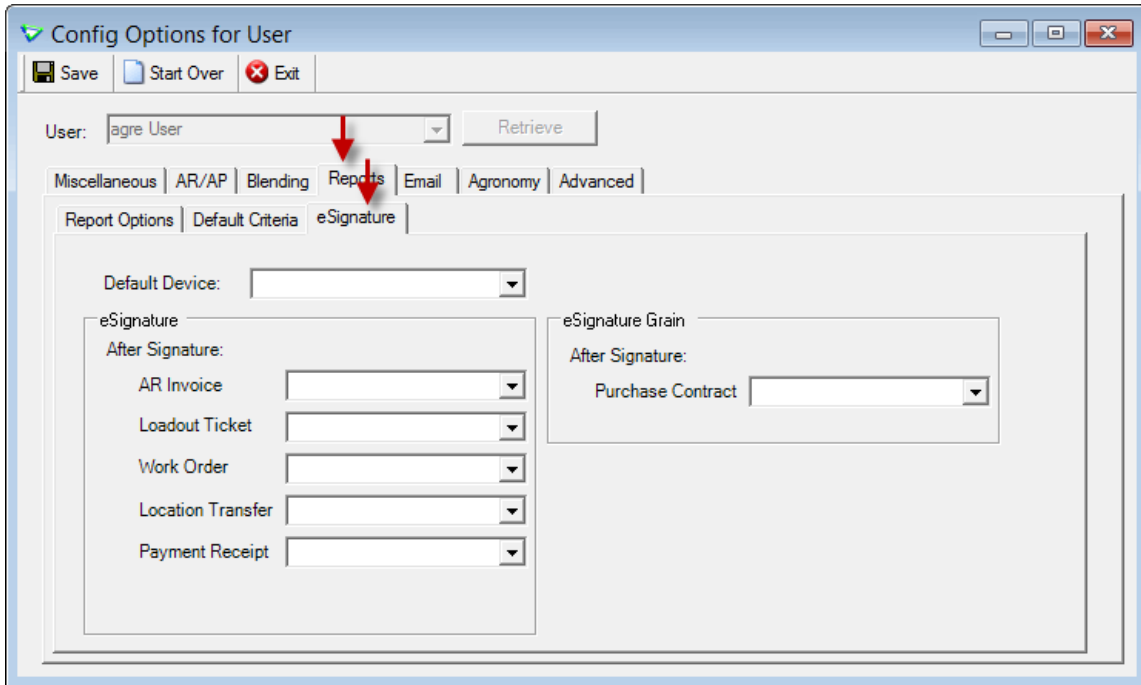

File > Config Options > Company

Tip	Choose **Generic** as the ***Default Device*** if a generic stylus or the customer's finger (perhaps on an iPad) will be mainly used to eSign documents.

User Config Options (optional)

These configuration settings can be personalized at the User Level on the **Reports / eSignature** subtab.
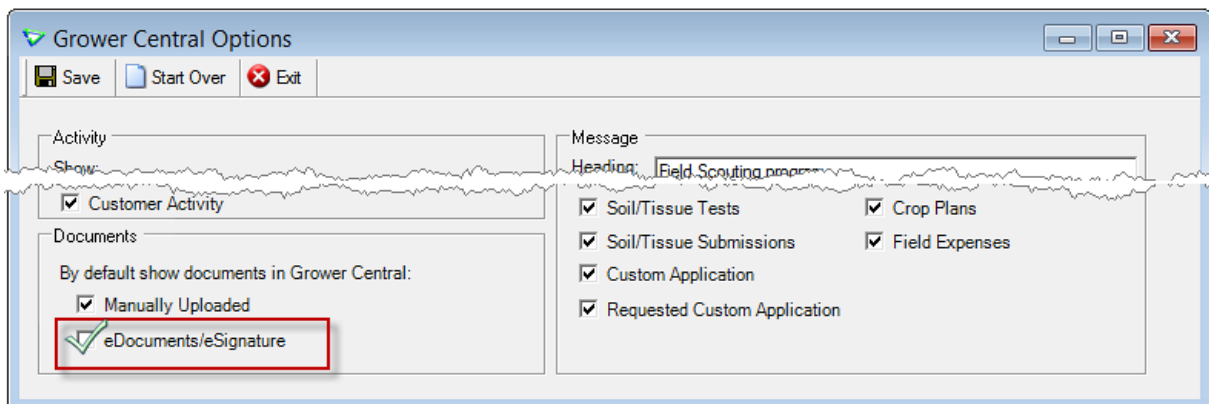

File > Config Options > User

| Tip | Choose **Generic** as the **Default Device** if a generic stylus or the customer's finger (perhaps on an iPad) will be mainly used to eSign documents. |

Grower Central Config Options (optional)

If you are using **Grower Central**, all eSigned documents can display by default.

File > Config Options > Grower Central

Adobe Acrobat Reader Preferences

agrē eSignature documents are saved in PDF format and can be opened by any PDF reader. Everything required to view the eSignature is included in the file and you should not need to install any additional security features or font packs to see them. If you are a hosted customer eSignature documents will open in Adobe Acrobat Reader, which is the agrē server's default PDF viewer.

Adobe Acrobat Reader has very robust signature authentication with far more security functionality than agrē eSignature requires. When opening signed documents, you may see a message similar to one of the following:
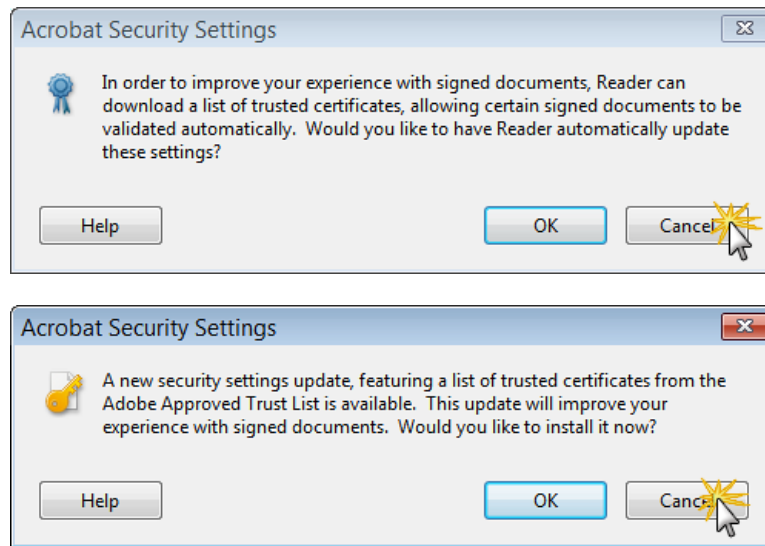
Click **Cancel**. You don't need to install a **list of trusted certificates** to view agrē eSignature PDFs.

If you'd like to suppress these messages permanently (and you don't need to authenticate any eSignature PDFs from applications other than agrē) you can edit your Adobe Acrobat Reader Preferences and turn off **Verify signatures when the document is opened**.
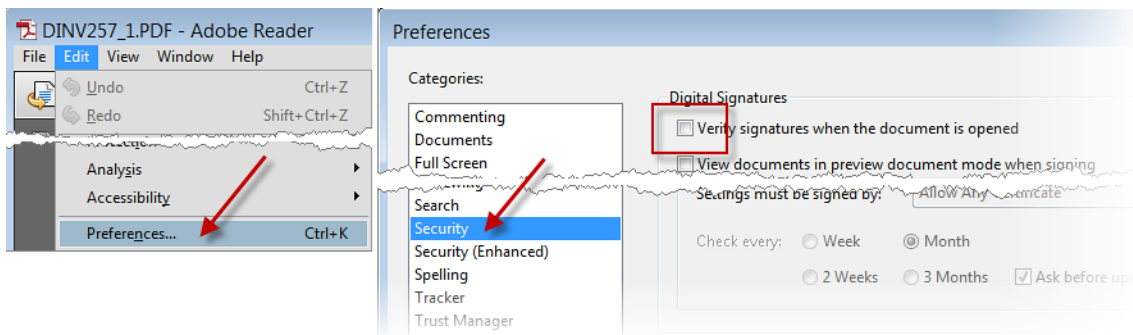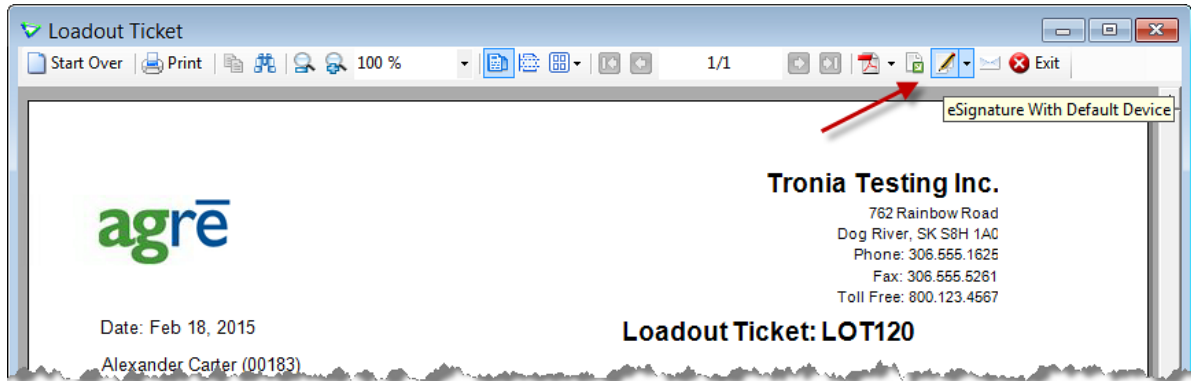
eSigning Documents/Reports

The process for single eSignatures is common to all reports. For reports that allow for multiple eSignatures, there's an extra step to add the second one.
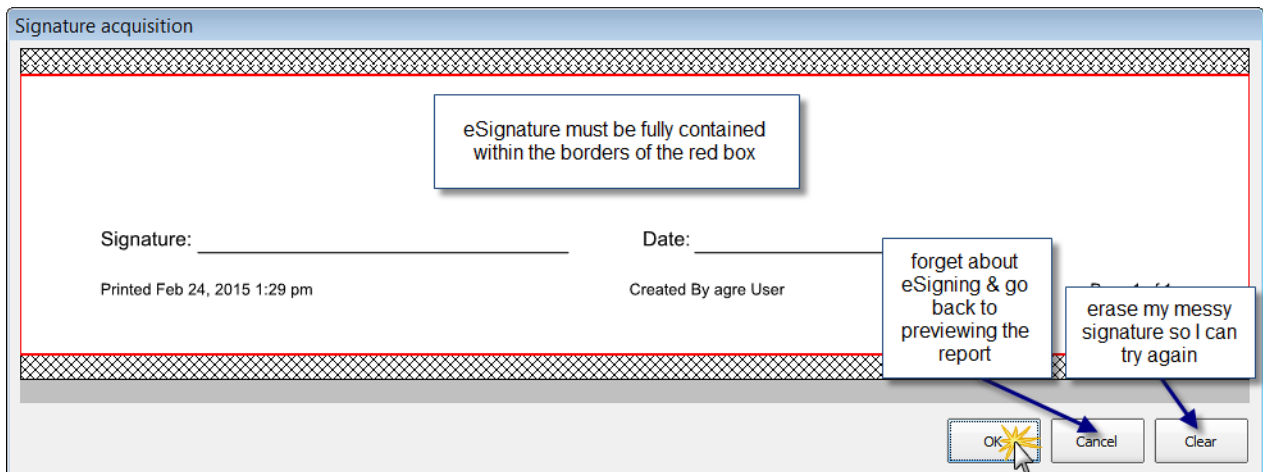
Single eSignature Reports

For single-signature reports adding an eSignature with your default device is as simple as clicking a button.

If you need to eSign with a device different from your default, click the down-arrow next to the button. This will allow you to select a different device for just this eSignature. You'll also see this window if no default signing device has been selected at the Company or User level.
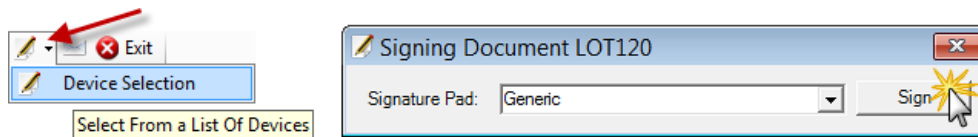
Use the signing device to add the signature and click OK.

After the report has been signed, agrē will listen to the **Company** or **User Config Options** and either close the report window, email the signed PDF, or bring up the Preview/Email window and let you decide.

# Multiple eSignature Reports

For reports that require multiple signatures, like the Location Transfer where both the shipper and the receiver need to eSign, follow the process above to add the first eSignature.

When the product gets to where it's going, adding an additional eSignature is just as easy. Click *Add New Signature*.
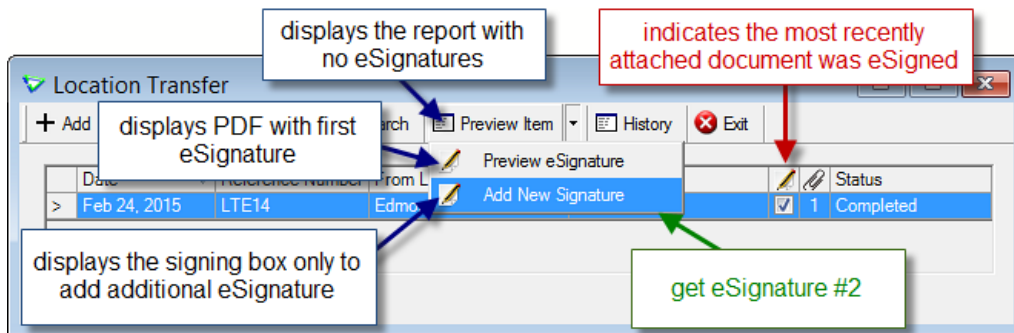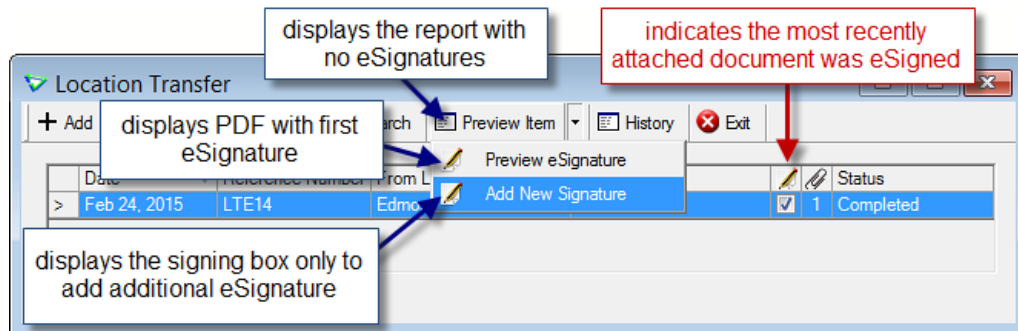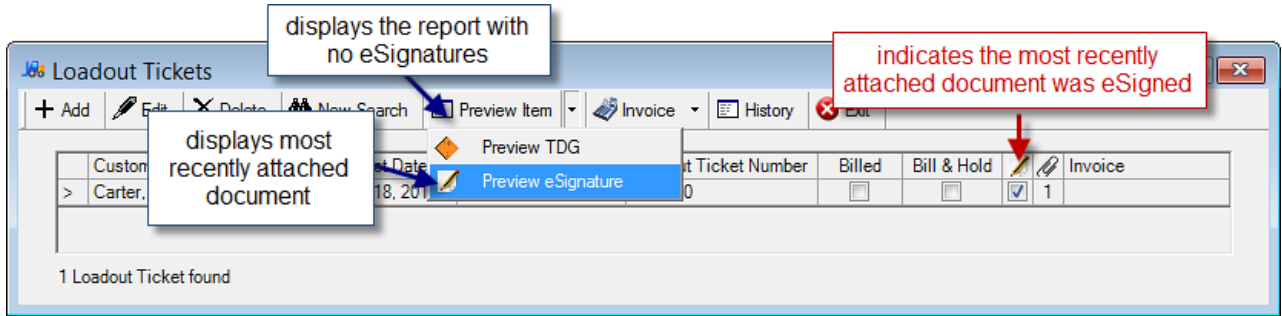

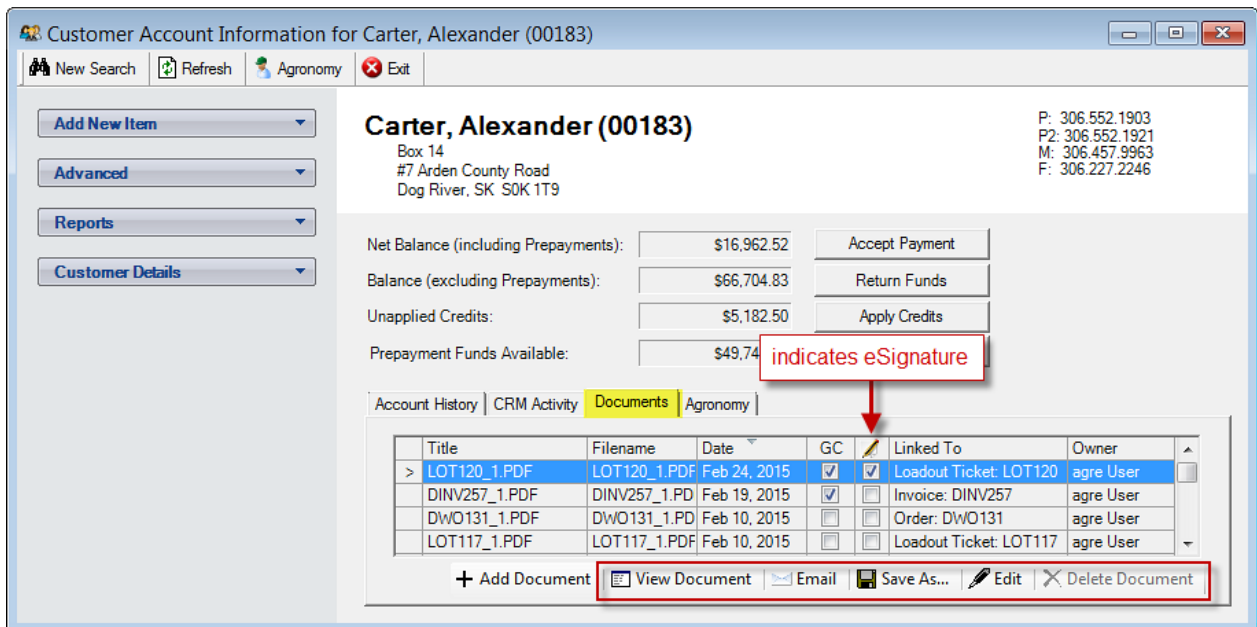The signing box displays with the previous eSignature so a second one can be added alongside.
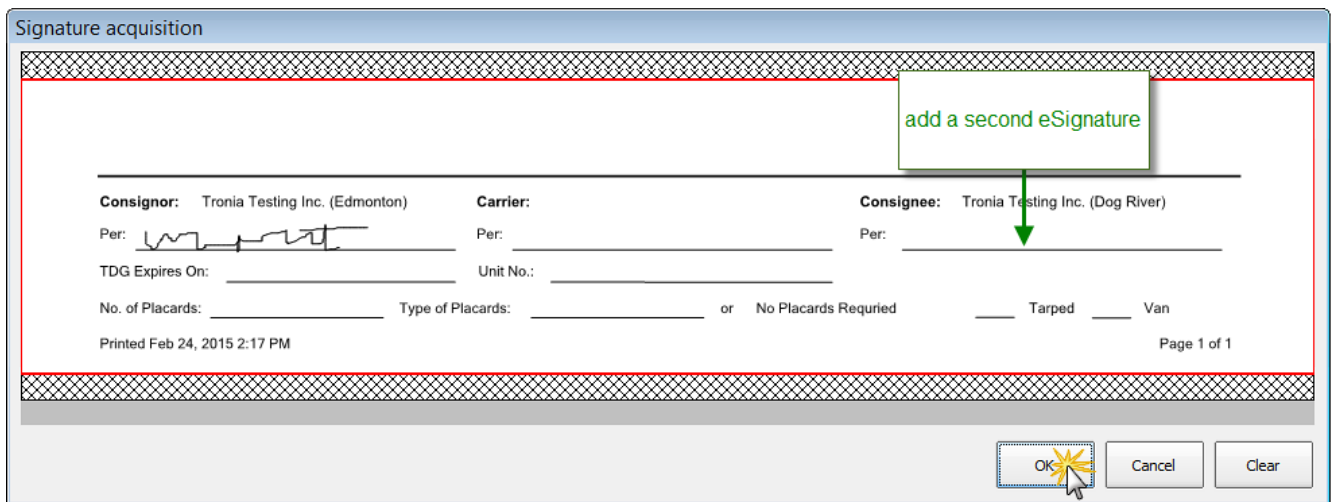
Managing eSignature Documents

As shown above, you can view the most recent eSignature document from its respective home form.
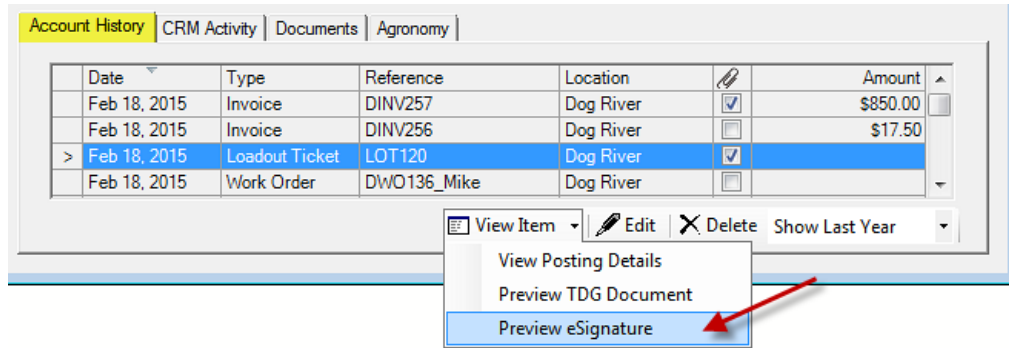

You can manage customer eSignature documents from the Customer Accounts *Documents tab* …

> **Note** eSigned documents cannot be deleted until their source document (e.g. the loadout ticket they're attached to) has been deleted.

… and view them from the *Account History tab*.

If you want to manage all types of eSignature documents from one central location, head over to the *Document Manager*.
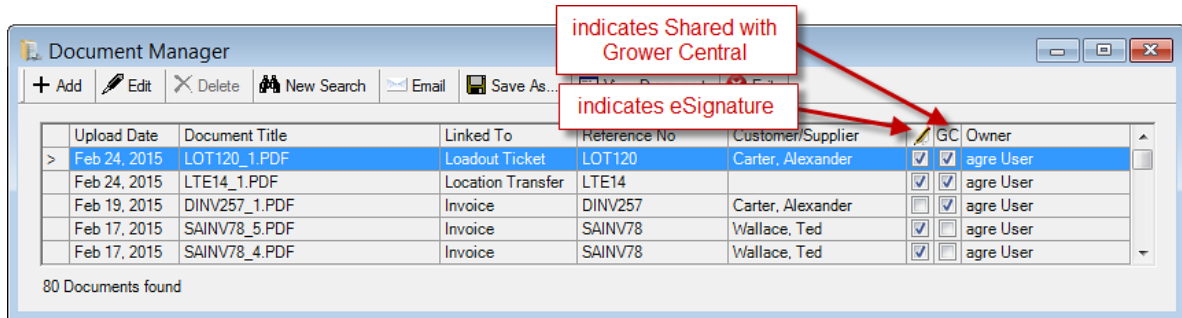
File > Manage > Documents

Help	For more detailed instructions on using the Document Manager, please refer to the relevant section in the whitepaper: *CRM - Customer Relationship Management*.