

# Assisted Remote Signing

## The Signing Ceremony, Anytime, Anywhere.

Remote Signing with Digital Contracting on Dealertrack uniFI® provides your customers with the convenience to sign documents from anywhere – without a trip to the dealership.

### Key Benefits:

**Digital Delivery:** Connect and send deal documents to your customer through an encrypted, online connection with a unique pairing code.

**Secure Signing Process:** Assist your customer through a paperless contract review and capture signatures confidently.

**Multiple Device Support:** Flexibility to connect with multiple devices such as Desktops, Laptops, iPads® and Android tablets with a 9" screen or larger.

### Please Note:

- Use of Assisted Remote Signing is subject to lender participation and approvals.
- Signing must take place the same day as verification.



### Documents that can be signed via Digital Delivery\*:



**Compliance:** Credit Application, Credit Bureau Authorization and Privacy Notice.

**Digital Contracting:** Funding Package Documents.

**Aftermarket Contracts**

**Final Menu Documents**

\* Subscriptions are required for select products.

Digital Contracting on Dealertrack uniFI®

# Section 1 | Pairing with your Customer's Device

**Pairing:** Setting up pairing with our Digital Delivery technology gives you the ability to connect and securely share signing documents to your customer's device.

## STEP 1

When you're ready to start the signing process with your customer, request them to open the following URL on their device: [delivery.dealertrack.com](https://delivery.dealertrack.com). They will see a waiting screen with a Pairing Code.

Recommended Browsers: Latest versions of Google Chrome, Safari, or Microsoft Edge.

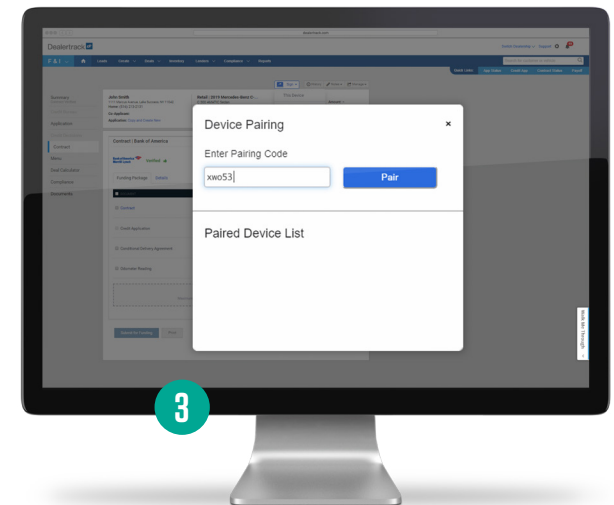
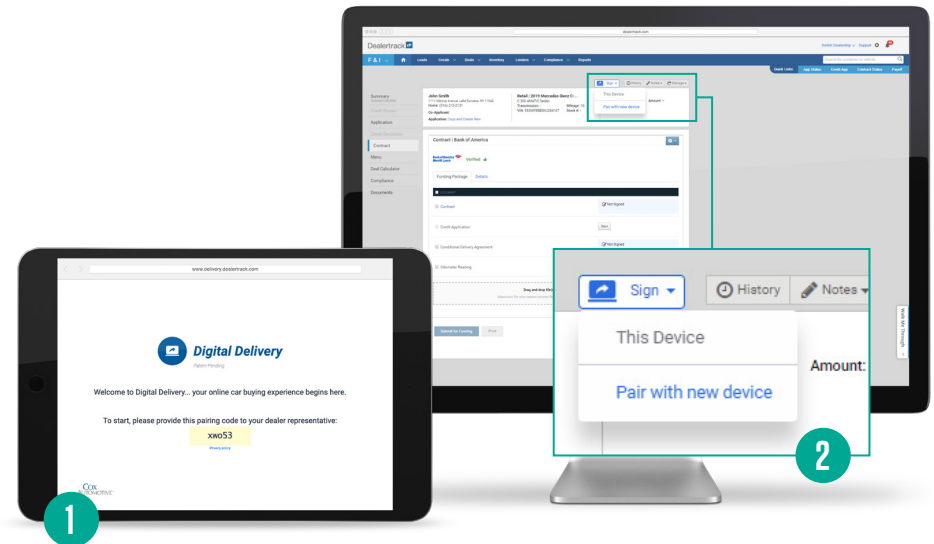
## STEP 2

On your desktop device within Dealertrack uniFI®, click the **Sign** button drop-down and choose **Pair with new device**.

## STEP 3

Ask your customer to provide you with the pairing code displayed on their device.

Enter the code in the **"Pairing Device Code"** field on your Desktop. Then select **Pair**.



# Section 1 | Pairing with your Customer's Device

## STEP 4

Create a temporary name for your customer's device (e.g. "Customer name iPad"). Click on **Complete Pairing**.

You will see a notification on the desktop that you have successfully paired with your customer's device.

Please Note:

- The customer's device will automatically unpair after a 2 hour period, or can be manually unpaired at any time.
- Before you pair with a customer's device, please ensure selected lender supports Assisted Remote Signing. You will see a strike through on the paired device name if the lender is unavailable.
- If you have Dealertrack DMS, you will need to start a separate signing session with your customer and pair the device again.

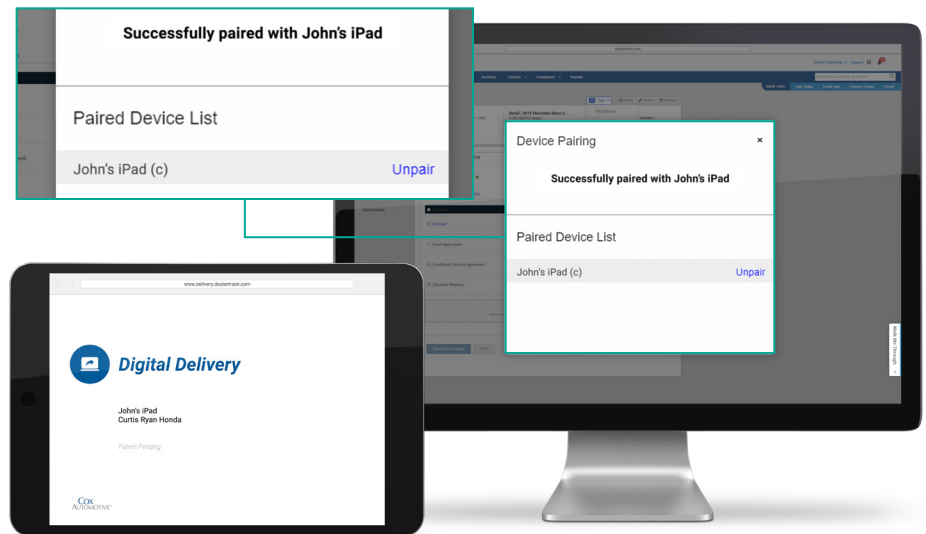
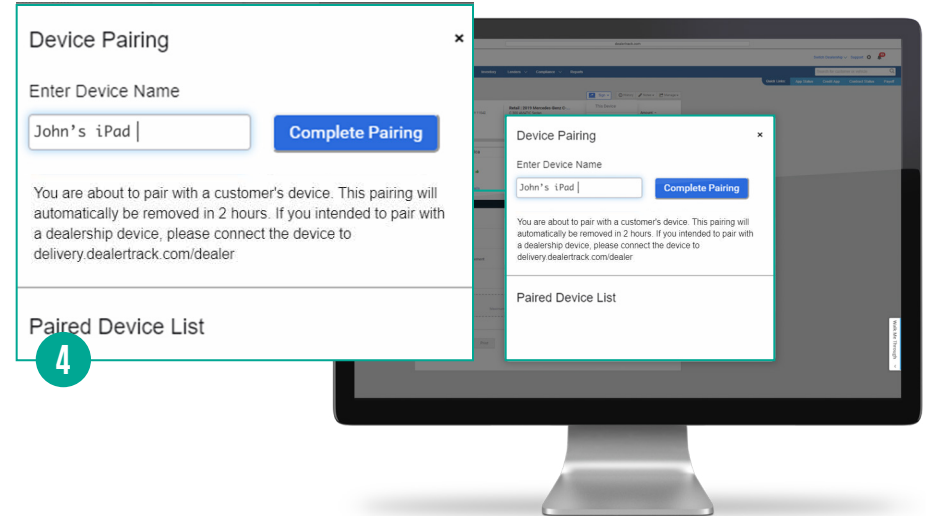
The customer can also click on the Digital Delivery icon to start a new pairing session.



You have now completed pairing with your customer's device and can start the signing session.



**Tip:** It is recommended to use video communication tools to guide your customer through the pairing and signing process for a better customer experience and to help verify identity.



## Section 2 | Signing Documents

### STEP 1

To send signing documents, click on the **Sign** button that will be highlighted in Dealertrack uniFI® and select your customer's paired device.

### STEP 2

If there is more than one signer, a list of signers will appear on your desktop screen. Select all signer(s) that will be signing on the paired device during this session. Remember to un-check the dealer. Then click **Continue**.

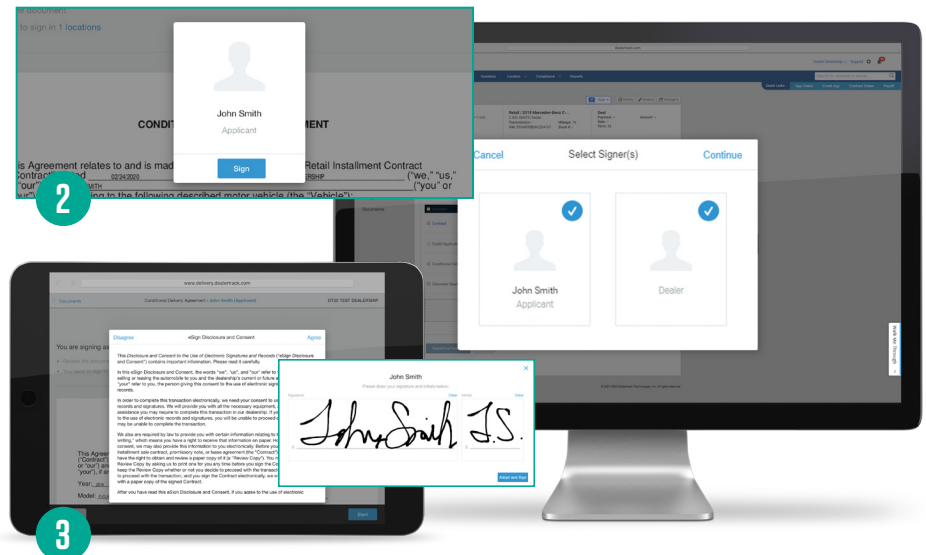
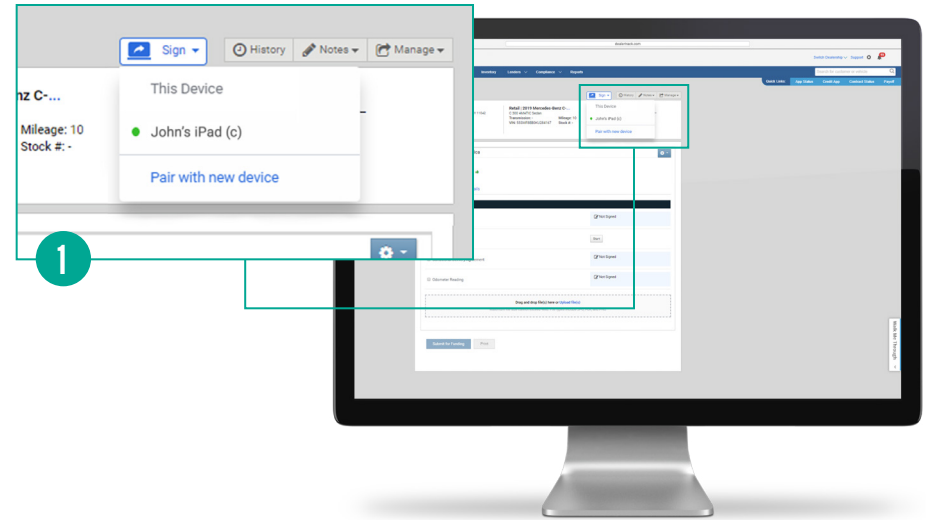
Please Note: If the Buyer and Co-Buyer are in different locations, you will need to set up a separate signing session for each signer.

### STEP 3

The signer will need to agree to the **eSign Disclosure and Consent** in order to proceed with signing on their device.

Request the customer to select **Print/Download** to review the documents prior to signing. Pop-up blockers must be disabled on their device browser setting to print or download.

Now the Signer will enter his/her signature and initials on the screen for the first signature block. Once signed, click **Adopt and Sign**.



**Tip & Sign:** Signatures need to be captured once in a signing session! After which all subsequent signatures automatically pre-fill with just a tap.



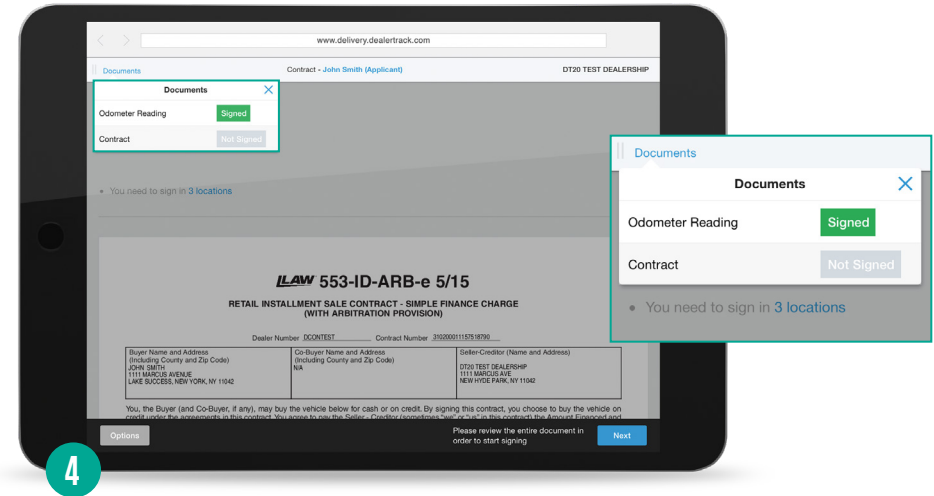
If the device is not touchscreen, the customer can use a touchpad or mouse to create a signature and click to pre-fill.

## Section 2 | Signing Documents

### STEP 4

To View all documents that are available to sign, click on the **Documents** link on the top left of the screen. This will show you your customer's progress as well.

Status	Color	Description
Not Signed	Gray	None of the signers have signed.
In Progress	Blue	Signing is in progress in the current signing session.
Signed	Green	All signers have signed the document.

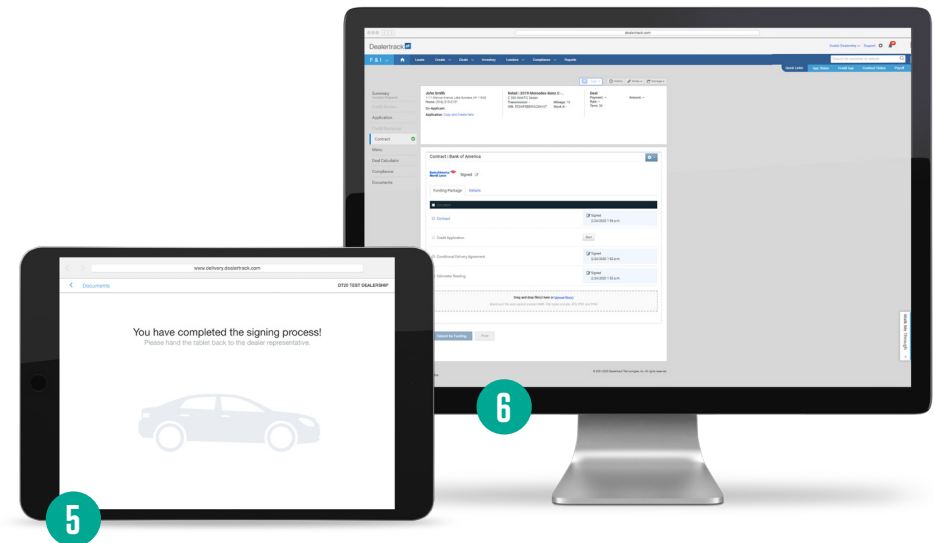


### STEP 5

After all required documents have been signed, the customer will be taken to a landing page on their device that displays **You have completed the signing process!**

### STEP 6

After signing is completed, refresh the desktop screen by clicking **Contract** on the left navigation menu or by clicking the **Refresh** button on your browser. **You will now be able to view/print all signed documents.**



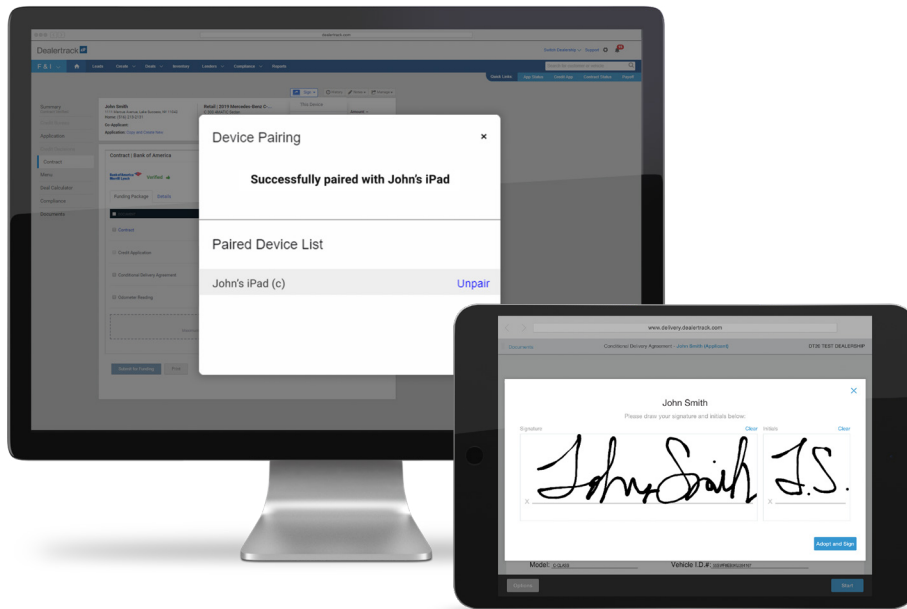
[Click here](#) for the step-by-step guide on how to submit a Digital Contract on Dealertrack uniFI®



Vehicle delivery must take place the same day as signing.  
Out-of-state deliveries are not supported at this time.

# Recommended Best Practices

Interested in learning more about Assisted Remote Signing?  
[Sign up for a live webinar today >](#)



- 1 Use Dealertrack Compliance\* to help verify customer identity during the deal process with Red Flag alerts, OFAC checks and pull out of wallet questions when necessary.
- 2 Contact your customer to ensure they are set up with the technology required for the signing session.
- 3 We recommend the use of video communications to authenticate buyer identity prior to connecting with your customer's device.
- 4 Walk your customers through video chat, if possible, so you can observe their screen and guide them through the signing process.
  - Explain eSign consent and how signature capture works.
  - Record the signing session with customer consent for ID Verification and to mitigate potential fraud risk.
- 5 Prior to signing, ensure customer reviews the contract onscreen or by using the print or download functionality.
- 6 Signing of the contract must take place the same day as vehicle delivery.<sup>1</sup>
- 7 During vehicle delivery<sup>2</sup>:
  - Validate the buyer's identity by matching their driver's license to the contract information.
  - Obtain a signed Delivery Receipt and retain for your records.
  - Have your customer complete any remaining DMV or dealer documents.
  - Relieve customer concerns by cleaning the vehicle in accordance to CDC Guidelines and communicate your sanitizing procedures to customers.
- 8 Use our [Point of Sale capture](#) functionality to snap and upload any remaining slips and trailing documents with your tablet.
- 9 Be sure to deliver the final signed copy of the contract to your customer.

<sup>1</sup> Customer must take delivery in the state they are in, as out-of-state deliveries are not available at this time.

<sup>2</sup> In locations where permitted by federal, state and local COVID-19 ordinances, consider offering at-home delivery and observe CDC protocols during vehicle delivery.

\* Compliance Subscription Required.