



Specialty:
Transportation
Services for
Elderly

Challenge:
Contract
Creation

Solution:
Contract
Management

Getting A Ride

Ingrid is a retired elderly woman who no longer can drive. Her children are working most of the time and unable to drive her to the grocery store every week. She is looking for a transportation service that can take her to grocery stores or shopping centers so she can purchase things she needs on a weekly basis.

Driving Together helps to provide transportation that is crucial for seniors so they have access to services such as medical care and grocery shopping. They provide transportation services that include individual door- to- door service, fixed route with scheduled services, or ridesharing with volunteer drivers. They use MossPaper to track their contracts sent to their clients.

Jenny calls Driving Together to get services arranged for her mother, Ingrid. She wanted to understand their services and how to get enrolled. Jenny was able to get a hold of Rachel who works for Driving Together.

Based on their conversation, Rachel was able to gather the requirements for Ingrid and told Jenny that she will send her a contract to review and sign. Rachel proceeded to add Ingrid into MossPaper as a customer with Jenny as the contact person. She was able to use tags to specify the type of service Ingrid wanted so everyone on her team can quickly identify the services being requested.



Monthly or Annual Contracts

Rachel created two service contracts. One contract is an annual fee with a 15% discount paid upon approval. The other contract is the 6-month contract paid monthly. Each contract includes a title and the length of service as well as when the service will begin.

Rachel is able to include in the payment and cancellation terms on the contract. She attached some emergency phone numbers as well as reference information that Jenny and Ingrid can review. In order to start the service, Jenny would just need to pay for the first month's deposit.

Rachel confirms the information and sends Jenny an email notification via Mosspaper. She can track the contract by viewing its status. The status page includes information on whether the contract has been view, signed and approved.

After receiving the contract via email, Jenny knew she has chosen the right driving service for her mother. The contract was clear and concise on what was to be expected as well as had a professional look to it. She was able to view both contract online without having to print anything.

Going With The Best Options

Jenny wanted to review the pricing with her mother as well as go over the schedule. She decided to go with the bi-annual rate-paying monthly to make sure her mother

is happy with the service before locking herself in long term. Jenny went to the link with the annual rate and rejected it.

In the comment box, Jenny informed Rachel that she would be going with the bi-annual rate. She opens the other contract and approves that. She signs the contract digitally and uses her credit card to make a deposit.

Jenny receives the approved contract. She forwards the information over to her mother along with the order confirmation. The service came the following week and has been taking Ingrid to the store.

Rachel gets an email notification when Jenny viewed, approved and made a payment for the contract through Mosspaper. In the contract, she is able to view the signed contract, review comment threads, and payment history. Mosspaper provides her everything she needs to know about Ingrid.

Jenny is happy with the service being provided. Ingrid has the flexibility of going where she needs to go. While, Driving Together and Rachel is able to help elderly seniors to their destinations and have Mosspaper to streamlines your operations to improve customer service as well organization.

Mosspaper's contract management manages your upcoming renewals. Often times without a database of existing customers, a renewal is missed or too time consuming to follow up on. Even worse, Rachel doesn't know when the contract end date is. So, with Mosspaper, when a contract is expiring, email notifications are sent out to customers so they are notified. They can easily send a customer a new renewal contract and get their signature digitally.