How to Request a Document for E-Signature

Adam Field - 2026-05-13 - Comments (0) - Matters

How to Request an E-Signature in Yao

This guide will show you how to request an e-signature for a document in Yao. E-signatures allow you to securely request and obtain signatures from contacts electronically.

Link to Video Guide: https://youtu.be/ZumbBk0isFE?si=eWAPtCvgfdvfIJ-2

Important: The document must be in PDF format for the 'Request e-signature' menu option to be available.

Before You Begin

To request an e-signature in Yao, you will need:

- A document in PDF format (see 'Converting Documents to PDF' section below)
- Contact details (email address and phone number) for the person who needs to sign
- Access to the **Correspondence** tab within a matter

Step 1: Convert Your Document to PDF

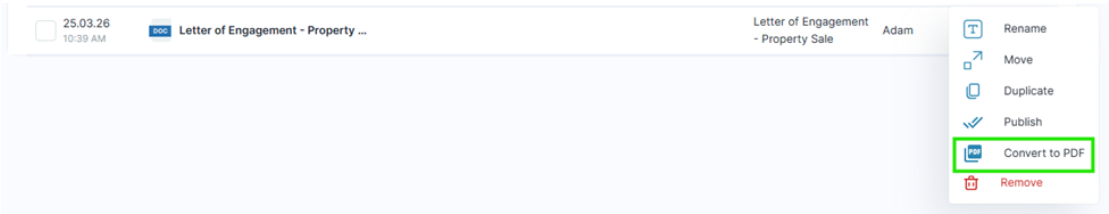
If your document is not already in PDF format, you must convert it first. Follow these steps:

1. Navigate to the **Correspondence** tab within your matter.

2. Locate the document you wish to convert in the correspondence list.

3. Right-click (or hover over) the document row to open the context menu.

4. Select **Convert to PDF** from the menu options.



Step 2: Request the E-Signature

Once your document is converted to PDF, you can now request an e-signature. Follow these steps:

1. Right-click (or hover over) the PDF document to open the context menu.

2. Select **Request e-signature** from the available options.

Step 3: Configure the Signature Request

A **Request signature** modal dialog will appear with a list of contacts. You must select at least one contact and confirm their email address and phone number before submitting the request. The modal contains the following fields:

Field	Description
Contact Name	The name of the contact who will sign the document. A toggle switch appears next to each contact name.
'request?' Toggle	A toggle switch that enables or disables the signature request for that contact. Toggle to the ON position (blue) to include this contact in the signature request.
Contact e-mail	The email address of the contact. This field is mandatory for sending the signature request. The email address is populated automatically from the contact's record.
Contact phone	The phone number of the contact. This field is mandatory. The phone number is populated automatically from the contact's record.

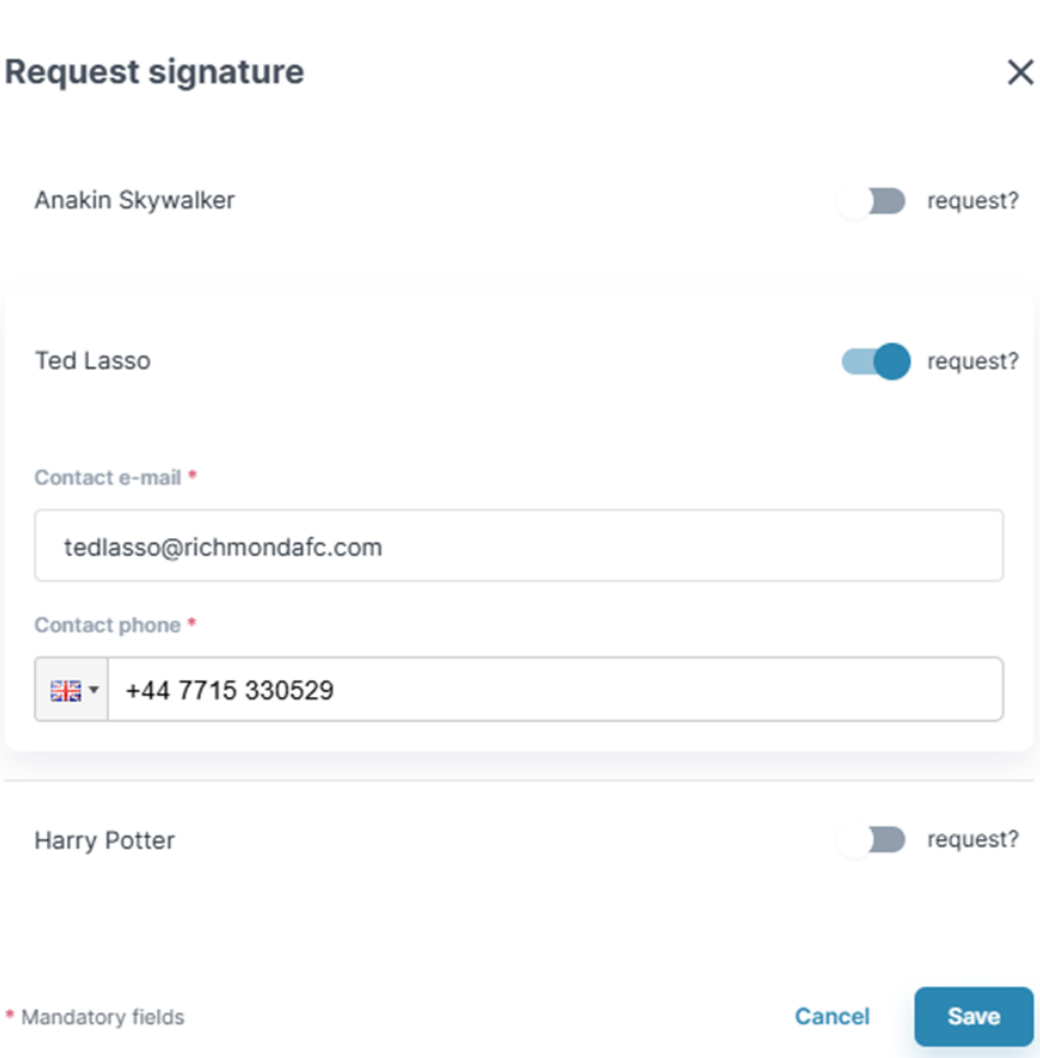
Selecting Contacts for Signature

1. Review the list of contacts displayed in the modal dialog.

2. Toggle the **request?** switch to the ON position (blue) for each contact who needs to sign the document.

3. Verify that the contact's email address and phone number are correctly populated in the respective fields.

4. Ensure that at least one contact is selected before proceeding. The form will show an error message if you attempt to submit without selecting at least one contact.



Step 4: Submit the Signature Request

Once you have selected at least one contact and confirmed their details, submit the request:

1. Click the **Save** button at the bottom right of the modal dialog.

2. The signature request will be sent to the selected contacts at their email addresses.

After Submitting the Request

Once the signature request has been submitted:

- The selected contacts will receive an email with a link to review and sign the document.
- They will need to open the email and click the link to access the e-signature portal.
- You can track the status of the signature request within the Yao system.
- Once all contacts have signed, the signed document will be returned to the matter within Yao.

Important Notes

- **PDF Format Required:** The document must be in PDF format for the **Request e-signature** option to appear in the context menu.
- **Contact Details:** Ensure that all contact email addresses and phone numbers are accurate before submitting the signature request.
- **Mandatory Selection:** You must select at least one contact to request a signature. The system will not allow you to submit a request without at least one selected contact.
- **Multiple Signatories:** You can select multiple contacts to sign the same document by toggling multiple contacts in the modal dialog.

For further assistance, please contact the support team.