

Send a document for signing

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However your client signs, Desk keeps track of the document until the signed copy comes back, puts it on the matter and checks the signatures against their file.

1 Add the document

On the matter, press **Add documents**, add the file and choose **Send for signing**. For a document already on the matter, press **Send for signing** beside it on the **Documents** tab.

2 Choose how they'll sign

Under **How will they sign?**, choose **Online with us** if your organisation signs documents with us, **Print and sign** to email it to them, or **In person or by post** if they'll sign it in front of you or post it back.

3 Online: say who signs

The client is already there. Add anyone else on the matter, or press **Add a witness**. Choose whether to check each signature against their file, ask them to show their face on camera, put the signed copy on the matter and move the matter on to Signing, then press **Send for signing**.

4 Print and sign, or in person

Under **Getting it back**, say who you're waiting on and when you need it. For **Print and sign**, add their email address and we'll email them the document with a link to send the signed copy back. If Desk has an email address, they can also simply reply to the email with it attached.

5 Follow it to the end

The matter's **Documents** tab shows each signer's progress under **Out for signing**, with **Send a reminder now** and **Cancel it**. For one signed in person, press **Got it back** and add the signed copy. Once it's back, it moves to **Signed and checked** with the result of the check.

If something goes wrong

Online with us can't be chosen.

Signing online isn't on for your organisation yet. An admin can turn it on, and in the meantime

Print and sign works for anyone with an email address.

They say the link doesn't work.

Each link stops working once the signed copy is back, and a reminder sends a fresh one. Press

Send a reminder now and ask them to use the newest email.