



# E-Signatures in Your Dashboard

**Now you can send retainer agreements from right inside LegalMatch!**

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# Sending Retainer Agreements via the Attorney Dashboard

The E-Signature feature is enabled by default for all attorneys in the system although this is configurable via **Attorney Test Feature** as indicated below.

The screenshot shows the 'ATTORNEY TEST FEATURES TOOL' in the LegalMatch admin interface. It includes a navigation bar with options like Supervisor, Dashboard, RAM, Administration, Cases, Reports, Tools, Salesforce, and Sign Out. The main area is divided into a 'List of Test Features' table and a 'Test Feature Information' panel on the right.

Name	Description	EnableAll
<a href="#">attorney.zoho.sign</a>	LMS-15139 Sending Retainer Agre...	true
<a href="#">attorney.interface.intro.video</a>	PLAN-651 Attorney Introduction Vi...	true
<a href="#">attorney.interface.lmca.announcement</a>	Attorney Interface Legalmatch Cal...	false
<a href="#">attorney.interface.calendaring.times...</a>	LMS-10923 Show separation of at...	false
<a href="#">attorney.interface.calendaring.external</a>	LMA-299 - Show/Hide consultatio...	true
<a href="#">attorney.interface.calendaring.enhanc...</a>	LMS-9301 Improve attorney calen...	true
<a href="#">attorney.notification.stilllooking</a>	LMS-2292: "Still Looking" Email	false
<a href="#">attorney.interface.estimatedvalue</a>	LMS-1914/LMS-1915 estimated v...	false
<a href="#">attorney.interface.response.consultati...</a>	LMS-2048: Schedule Consultation ...	true
<a href="#">attorney.interface.lcc.button</a>	LMS-1938 Attorney Consultation C...	true
<a href="#">attorney.interface.engage.response.c...</a>	LMS-1513: Time To Respond	true
<a href="#">attorney.interface.decline.response.c...</a>	LMS-1513: Time To Respond	true

**Test Feature Information:**

Name:

Description:

Date Created:

EnableAll: ☒

Banner Enabled: ☐

Banner Template:

Start Date:

End Date:

Count:

Conversion:

Modified By:

Date Modified:

Reason:

The E-Signature menu can be found in **Attorney Settings**.

The screenshot shows the 'My Account' page in the LegalMatch attorney interface. The top navigation bar includes 'New', 'Open', 'Responded', 'Consultation Completed', 'Engaged', 'Archived', 'Refer & Earn', and 'More'. A dropdown menu is open, showing 'My Profile', 'Firm Profile', 'Account Settings' (highlighted with a red box), 'Templates', 'Notifications', 'Reviews', 'Engaged Clients', and 'Attorney Resources'. Below the dropdown, the 'Login Info' section is visible, with a sidebar menu on the left containing 'Login Info', 'Contact', 'Contact 2', 'Subscription', 'CRM', and 'E-Signature' (highlighted with a red box). The main content area shows the 'Zoho Sign Integration' section, which includes a note about fees and charges and a link to the Zoho Sign Service.



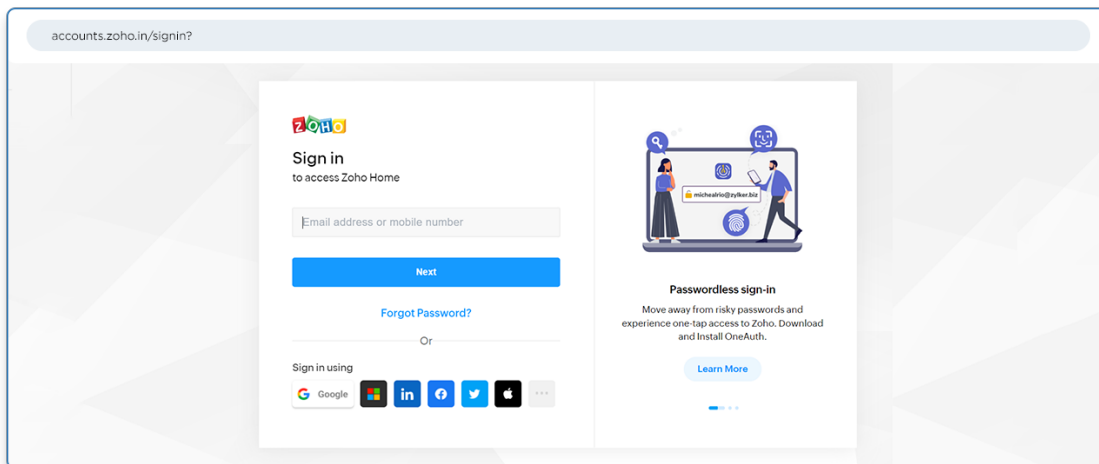
## How It Works

1

Go to Account Settings and click E-Signature. Click the Link Zoho sign Service. Page will be navigated to

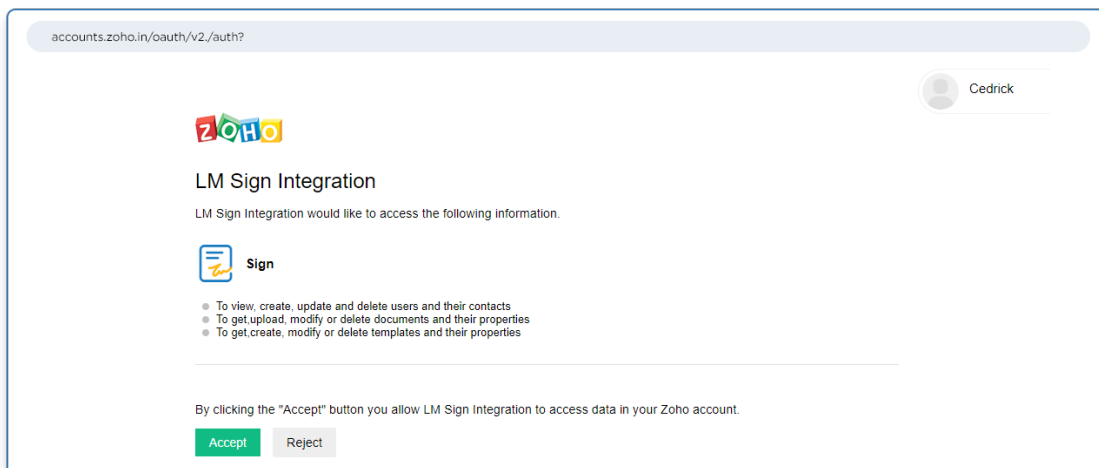
<https://accounts.zoho.com/signin?>

[servicename=AaaServer&serviceurl=https%3A%2F%2Faccounts.zoho.com%2Foauth%2Fv2%2Fauth%3Fscope%3DZohoSign.documents.ALL%252CZohoSign.templates.ALL%252CZohoSign.account.ALL%26client\\_id%3D1000.6MHO86XNP02SGMX3ATP28XMBTGZMPL%26response\\_type%3Dcode%26access\\_type%3Doffline%26prompt%3DConsent%26state%3DZohoSign%26redirect\\_uri%3Dhttps%253A%252F%252Fwww.legalmatch.com%252Fhome%252Fia%252Fzoho%252FregisterSign.do](https://accounts.zoho.com/signin?servicename=AaaServer&serviceurl=https%3A%2F%2Faccounts.zoho.com%2Foauth%2Fv2%2Fauth%3Fscope%3DZohoSign.documents.ALL%252CZohoSign.templates.ALL%252CZohoSign.account.ALL%26client_id%3D1000.6MHO86XNP02SGMX3ATP28XMBTGZMPL%26response_type%3Dcode%26access_type%3Doffline%26prompt%3DConsent%26state%3DZohoSign%26redirect_uri%3Dhttps%253A%252F%252Fwww.legalmatch.com%252Fhome%252Fia%252Fzoho%252FregisterSign.do)



2

For attorneys with existing ZohoSign account, input the username and password to login.



3

Click **Accept** and attorney is navigated back to the dashboard with a banner **Zoho Sign Service Linked**.

legalmatch.com/home/ia/home.do

LegalMatch

Search Cases [ ] Search TOTAL ESTIMATED VALUE: \$2,147,797,601 Christopher ▾

New 198 Open 27 Responded 1521 Consultation Completed 42 Engaged 675 Archived View All Account Cases ▾ Refer & Earn

More Cases 14

Zoho Sign Service Linked [X]

Cases 1-40 of 198 1 2 3 4 5 >

CASE TITLE ▾	CONSULTATION TIMES	LOCATION ▾	POSTED ▾
Adoptions from Nowheresville	1 Time Requested	Nowheresville, XX	11/03/2022 6:50 PM CST
Shu Yamino		Nowheresville, ZZ	11/03/2022 5:51 PM CST

4

For attorneys without existing Zoho accounts, click **Sign Up Now**, which will redirect to the registration page.

accounts.zoho.in/signin?

**Zoho**

Create your Zoho account

First Name [ ] Last Name [ ]

Email Address [ ]

Password [ ]

Enter CAPTCHA [ ]

Your data will be stored in the US data center, as you are in Philippines. [Change country](#)

☐ I agree to the [Terms of service](#) and [Privacy policies](#) of Zoho Corporation

**Sign Up**

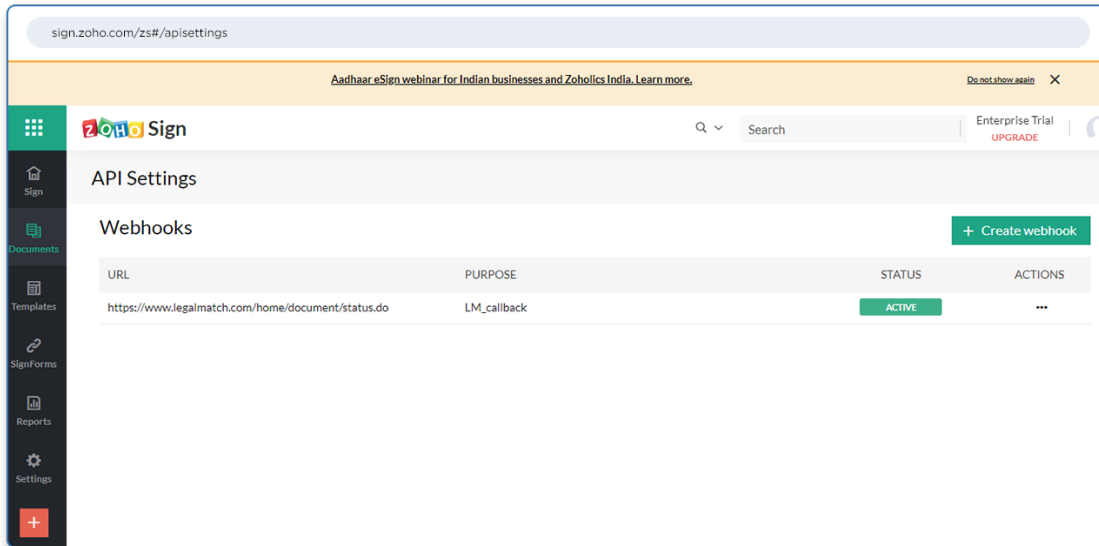
Sign up using

[Google](#) [Facebook](#) [LinkedIn](#) [Twitter](#) [Microsoft](#) [Apple](#)

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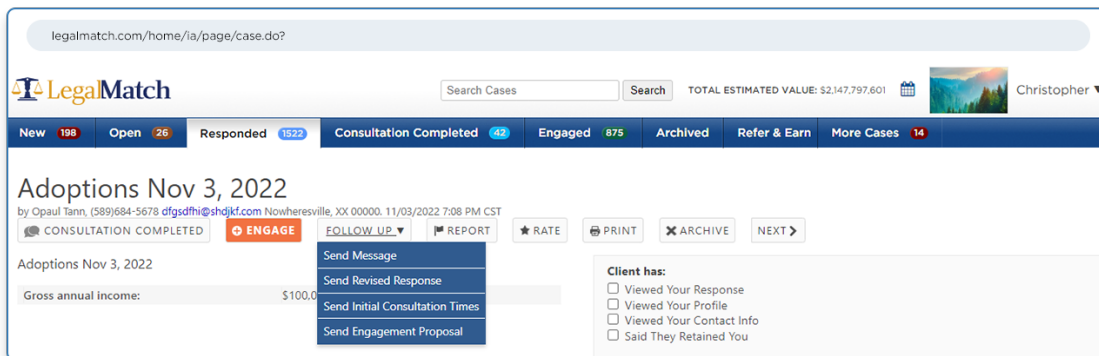
At this point, once the Zoho Sign account is linked to the attorney, the callback is automatically generated in **Zoho API Settings**.

*Note: You may need to verify that this is created, otherwise the EP Document Status will not work as intended.*



6

Once setup, the attorney can now send an Engagement Proposal via the **Follow Up** button in the **Responded, Consultation Completed and Engaged** Tab accordingly.



7

Take a case and Send an Engagement Proposal. If templates are not set up, it should prompt the following.

legalmatch.com/home/ia/page/case.do?

A note about this case

Save

Follow up to Send Engagement Proposal for "asdfkhjaskjh"

**No Engagement Proposal templates found.**

Please setup your templates through the [Zoho Sign Dashboard](#).

FOLLOW UP ▲

8

If templates are set up, it should display the templates in the dropdown.

*Note: Check video recording how to setup templates in Zoho.*

legalmatch.com/home/ia/page/case.do?

Save

Follow up to Send Engagement Proposal for "asdfkhjaskjh"

Select Template

Choose...  
Choose...  
Gary Bolenbaugh's LM Engagement Letter 2022  
Contract

SEND ENGAGEMENT PRO

FOLLOW UP ▲

9

Attorney chooses a template from the dropdown and click **Send Engagement Proposal**.

legalmatch.com/home/ia/page/case.do?

Save

Follow up to Send Engagement Proposal for "Adoptions Nov 3, 2022"

Select Template: E-Signature Template

SEND ENGAGEMENT PROPOSAL CANCEL

CONSULTATION COMPLETED FOLLOW UP

10

From the top of the attorney dashboard, a banner should display **Engagement Proposal Document Sent**.

legalmatch.com/home/ia/page/case.do?

LegalMatch Search Cases Search

New Open Responded Consultation Completed Engaged Archived

**Engagement Proposal Document Sent**  
Call Maria Salazar: [Call this client](#) or email [Email this client](#)

**E-Signature Demo Case 5**  
by Maria Salazar, [Call this client](#) [Email this client](#) Nowheresville, XX 00001. 10/07/2022 6:41 AM CST

CONSULTATION COMPLETED ENGAGE FOLLOW UP REPORT RATE PRINT ARCHIVE NEXT

This is a demo case for E-Signature.

Client has:

11

From the case details, the attorney should be able to see the **EP Document Status as Sent**.

legalmatch.com/home/ia/page/case.do?

**We Are Fierce Advocates For Our Clients**  
From You. Sent on November 04, 2022

If you face divorce, the steps you make at this important time will set the tone for your future, financially and emotionally. At our firm, we can provide you with the legal guidance to set the tone for your future financially and emotionally so that you make the right decisions in regard to property division, custody, support and other divorce-related matters.

Contact our office today to schedule your initial consultation.

Acceptance: This response may be revoked at any time before it is accepted.  
I am willing to offer an initial consultation of **1/2 hour** for **free**.

**Reply Status**  
Reply Sent: 11/04/2022

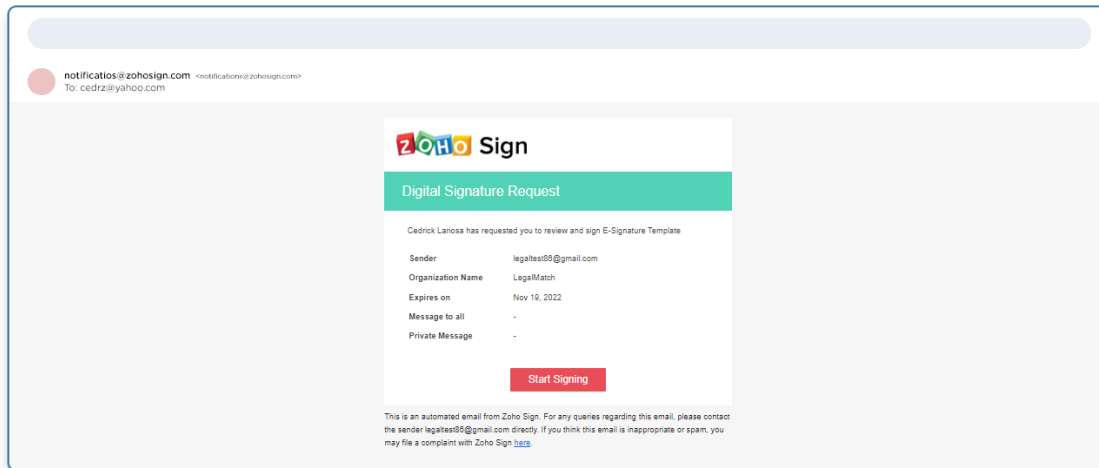
**Engagement Proposal Document Status:**  
Sent - 11/04/2022 5:05 PM CST

CONSULTATION COMPLETED FOLLOW UP



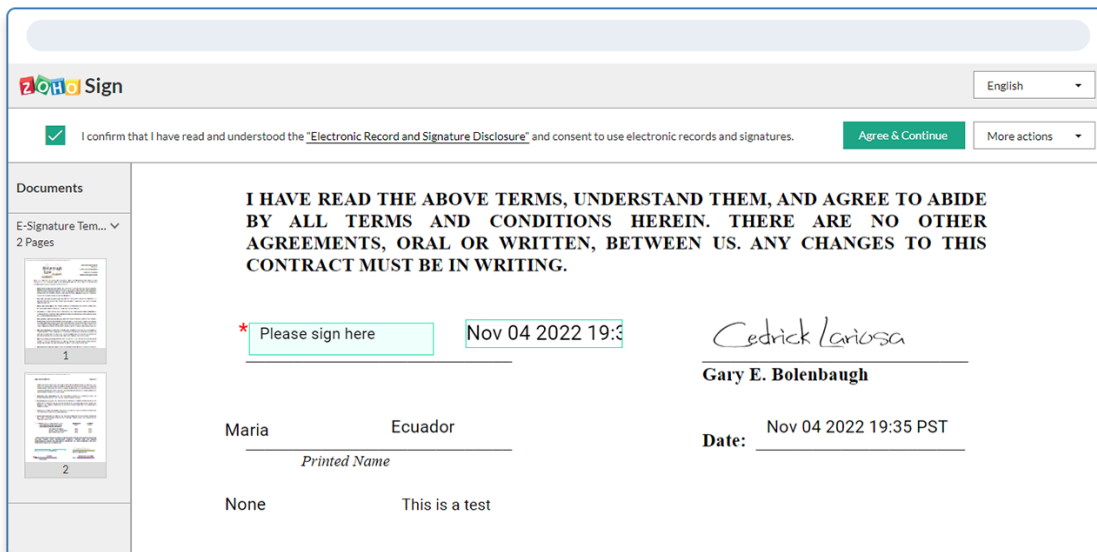
12

An **email is then sent by Zoho** to the client indicating the attorney request to sign the Engagement Proposal document.



13

Once the client clicks **Start Signing**, a new tab is open redirecting to the document in Zoho Sign dashboard.





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At this point, the **EP Document** status should be updated from **Sent to Viewed**.

- Credit Card
- Venmo

**Separate Expenses:**

- Court costs
- Travel

**Reply Status**

📧 Reply Sent: 11/04/2022

**Engagement Proposal Document Status:**

📄 Viewed - 11/04/2022 7:37 PM CST

15

Also, it is possible to append automatically the following information: **client\_firstname, client\_lastname, retainer\_fee, retainer\_other\_info**. These can be set up in the templates.

AGREEMENTS, ORAL OR WRITTEN, BETWEEN US. ANY CHANGES TO THIS CONTRACT MUST BE IN WRITING.

\* Please sign here

Nov 04 2022 19:3

*Cedrick Lariosa*

Gary E. Bolenbaugh

Maria

Printed Name

Ecuador

Date: Nov 04 2022 19:35 PST

None

This is a test

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Once the client signs the document and click **Finish**, the EP process is completed.

The screenshot shows a web-based document signing interface. At the top, a status bar indicates "You've successfully filled all fields. Click Finish to complete." with a green "Finish" button and a "More actions" dropdown. The document content includes a bolded statement: "I HAVE READ THE ABOVE TERMS, UNDERSTAND THEM, AND AGREE TO ABIDE BY ALL TERMS AND CONDITIONS HEREIN. THERE ARE NO OTHER AGREEMENTS, ORAL OR WRITTEN, BETWEEN US. ANY CHANGES TO THIS CONTRACT MUST BE IN WRITING." Below this, the document is signed by "Maria Ecuador" on "Nov 04 2022 19:3" and "Gary E. Bolenbaugh" with a handwritten signature "Cedrick Lariosa". The date "Nov 04 2022 19:35 PST" is also present. A "Printed Name" field shows "Maria Ecuador". At the bottom, there are radio button options for "None" and "This is a test". A sidebar on the left shows "Documents" with "E-Signature Term..." and "2 Pages".

17

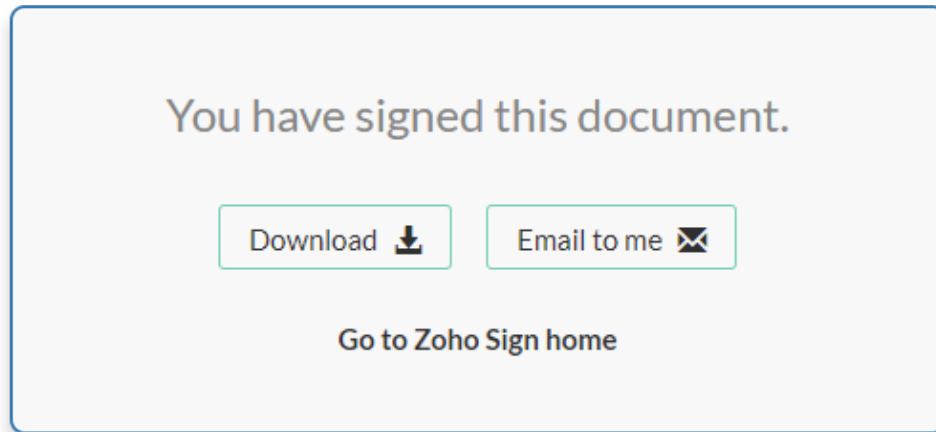
In the case details from the attorney dashboard, the **EP Document status** is updated from **Viewed to Completed**.

The screenshot shows a case details form with the following sections:

- Payment Methods:**
  - Check
  - Credit Card
  - Venmo
- Separate Expenses:**
  - Court costs
  - Travel
- Reply Status:**
  - Reply Sent: 11/04/2022
- Engagement Proposal Document Status:**
  - Completed - 11/04/2022 7:46 PM CST

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The client has then the option to **download or email the signed document** in Zoho.





[www.LegalMatch.com](http://www.LegalMatch.com)

