



SignIT: Electronic Document Signatures
through LawMaster Integration with
InfoTrack

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InfoTrack SignIT Tool

Overview

InfoTrack’s SignIT is an easy-to-use electronic signing tool that enables you to sign documents online in a few simple steps. It saves you time and money by allowing you to execute documents faster and avoid the hassle of printing, scanning and posting.

Parameter & Security Setup

Prior to you being able to use this tool, you must ensure the following prerequisites:

InfoTrack Login

The user/organisation must have active user accounts for InfoTrack saved in the User Security.

Security → Maintain User Security→ Select User → Search Logins tab

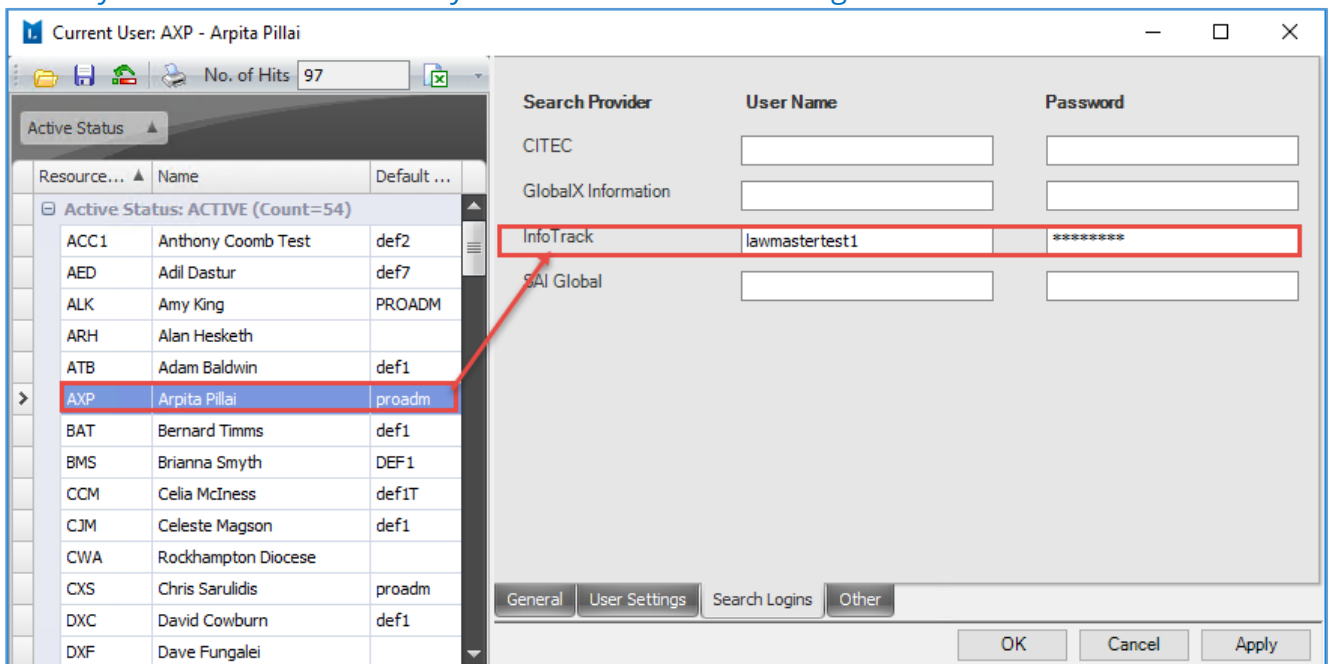


Figure 1: Valid Logins Saved for InfoTrack in User Security

Search Provides – SPR Parameter

The Disbursement Code (DC) parameter must be defined for SignIT in the InfoTrack details on the SPR parameter. Disbursement codes can be defined for both GST applicable and GST exempt.

Parameters → Set Parameters → Matter and Client → Disbursement Code (DC)

Figure 2: Setting up Disbursement Code to use for SignIT

Parameters → Set Parameters → Searches → Search Providers (SPR) → INFOTRACK → Right-Click → Modify

Figure 3: SignIT Disbursement Code setup in SPR Parameter

Searches Menu

Users must have the access to the Searches menu items.

Rights to File Class – L

Users must have Amendment or Deletion rights to File Class L – Folios to access the SignIT option from the context menu.

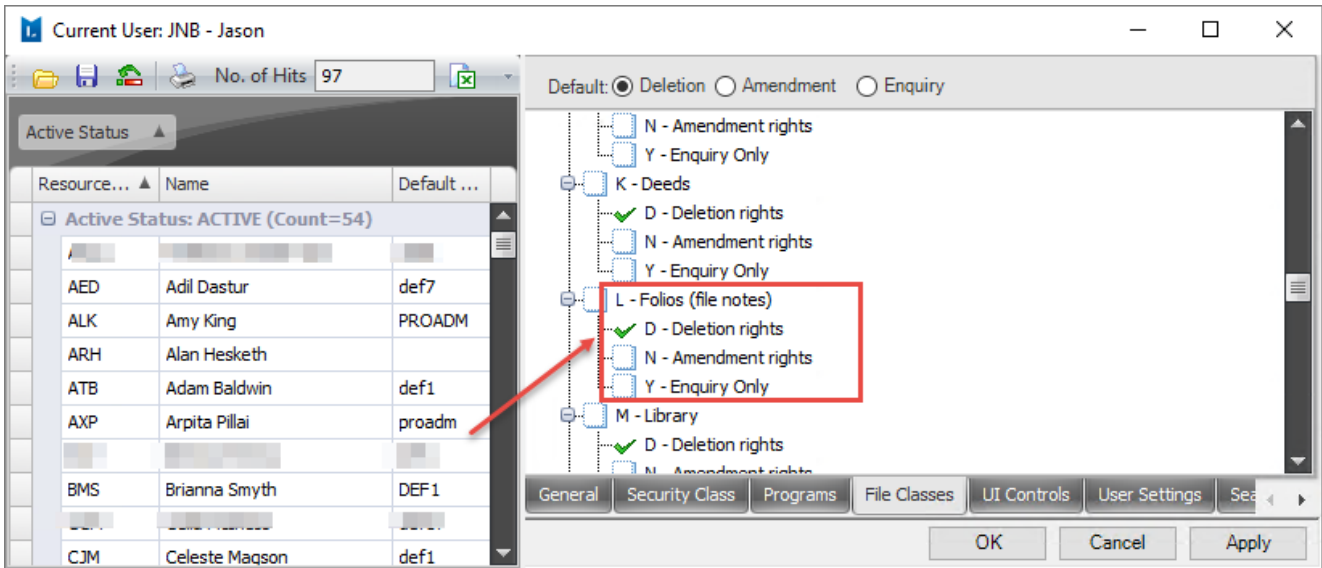


Figure 4: File Class - L Amendment or Deletion Rights

SignIT Procedure

SignIT allows you to upload matter folios and send it to parties via a secure email link. Parties can then review and sign the document online from any location. You can track who has signed the document which is tracked within LawMaster. When all the parties have signed, everyone receives a final signed copy.

NOTES:

- ❖ The SignIT menu option is only available for the PDF and the Word (.docx) documents.
- ❖ This option is not available on 'Closed' matters or on folios that are not associated to a matter within LawMaster.

After all prerequisites are met for the signed-in user, to send a folio using SignIT follow the below steps:

1. From the **Matter** → **Folios**, right-click and select **SignIT** → **Send to SignIT** option from the folio context menu.

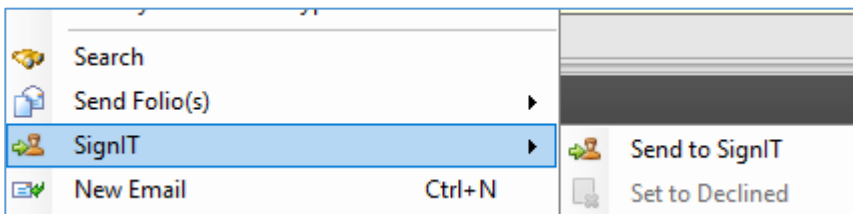


Figure 5: Send to SignIT from Folio Context Menu

The system uploads the document to SignIT tool in InfoTrack.

- From the Infotrack SignIt window select the **Add Signer** button to input signer details and roles until all signatories have been added.

Signer Details

✕

First name *	Last name *	Email *
Beaudean	Harding	test@test.com.au
Country code	Phone	Signer role *
+61 ▼	Enter	Client ▼

Give instruction to this signer (optional)

Enter text

📎
Drop **Cover Letter** or [browse files](#)
PDF, DOC or DOCX

Require SMS Verification for signing
 Require a witness

Cancel
Confirm

Figure 6: Adding Signers in SignIT

- You can drag and drop the field options available in the left pane to the required location in your document. We recommend you use LawMaster document automation to pre-populate as much data in the document as possible.

Signers

SIGNER 1

Beaudean Harding

Signature	Initial
Date signed	Name
Checkbox	Text field
Approve	Radio

SIGNER 2

Gemima Harding

SIGNER 3

Drag here or add below

Add Signer

Viewers

Add a Viewer and they will receive email updates and a copy of the original and signed document. This is optional and they won't be asked to sign the document.

Add Viewer

Create a signing order

Cost Agreement

Dear Beaudean Harding

We estimate the following:

Professional Fees: \$8,555.00

Disbursements: \$1,755.00

Please sign and return the agreement.

Example

Beaudean Harding

Date DD/MM/YYYY

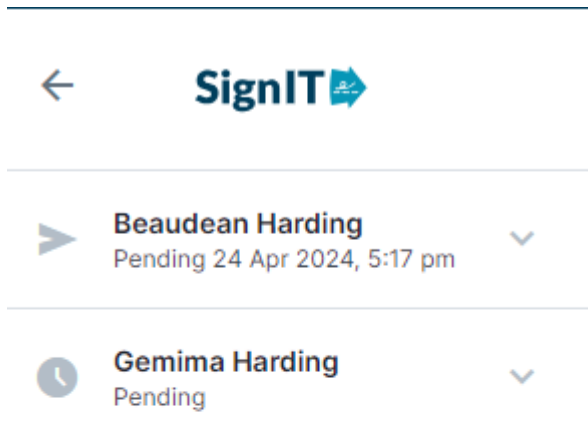
Example

Gemima Harding

Date DD/MM/YYYY

Figure 7: Adding a Signature block to a document

4. You can set the signing order by selecting the **Create a signing order** checkbox on the left.
5. Click **Finish & send** button.
6. The system sends the document to the recipient's email and the status changes to **Pending**. You can cancel the signature request by clicking the **Cancel Order** button.



ACTIONS




-  Order details
-  Manage signing reminders
-  Cancel order

Figure 8: Status upon sending the document to the Intended Recipient.

An illustration of how the email will appear on the recipient's inbox is as below:

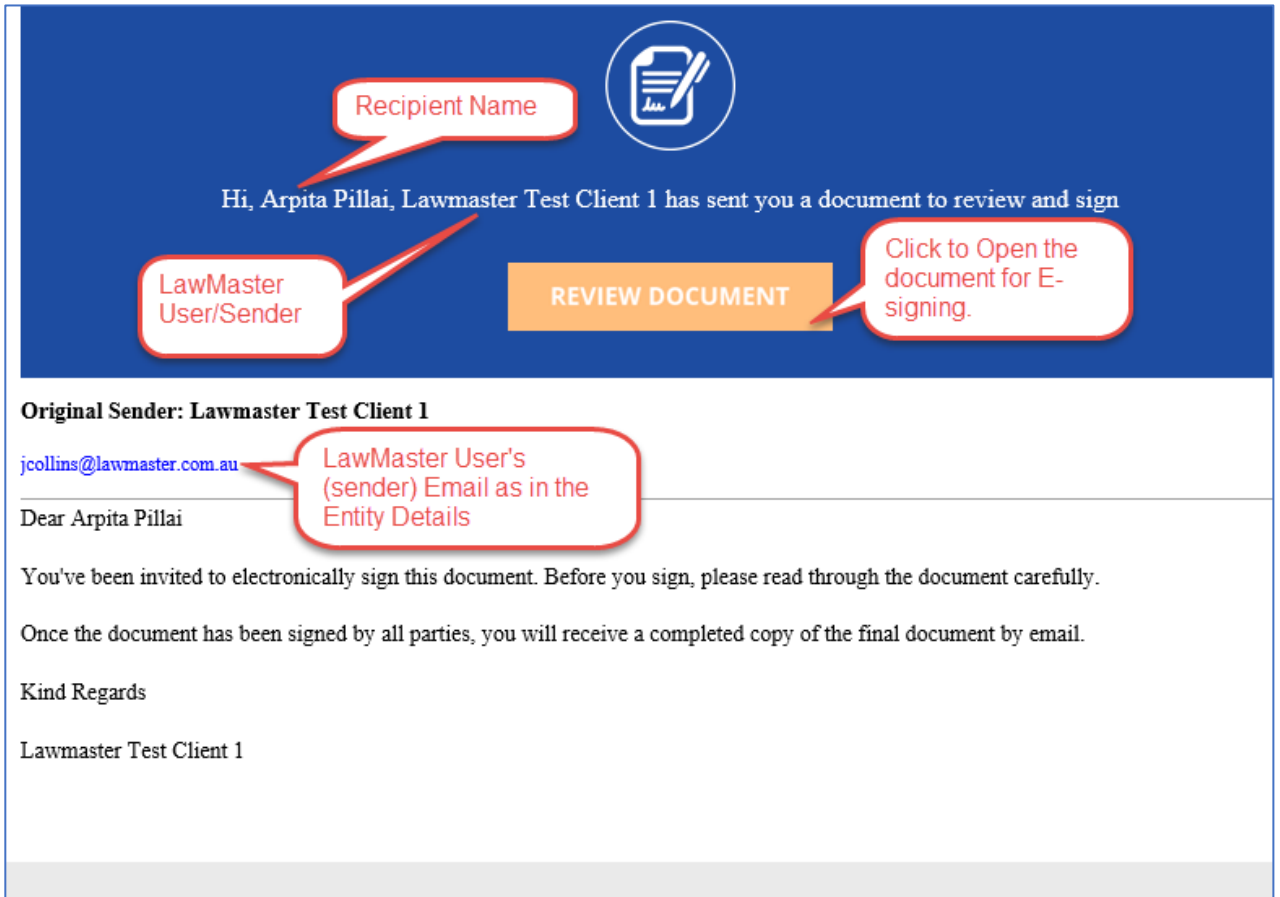


Figure 9: Email Illustration in the Recipient's email Inbox

7. The Receiver can click the **Review Document** button.
8. This will open the document in InfoTrack for further action. The recipient can choose to **agree to use electronic records and signature** and click **CONTINUE** or choose an action from the **OTHER ACTIONS** drop-down.

Please Review & Act on These Documents



InfoTrack AU
InfoTrack Ltd AU

Kindly review and sign this document

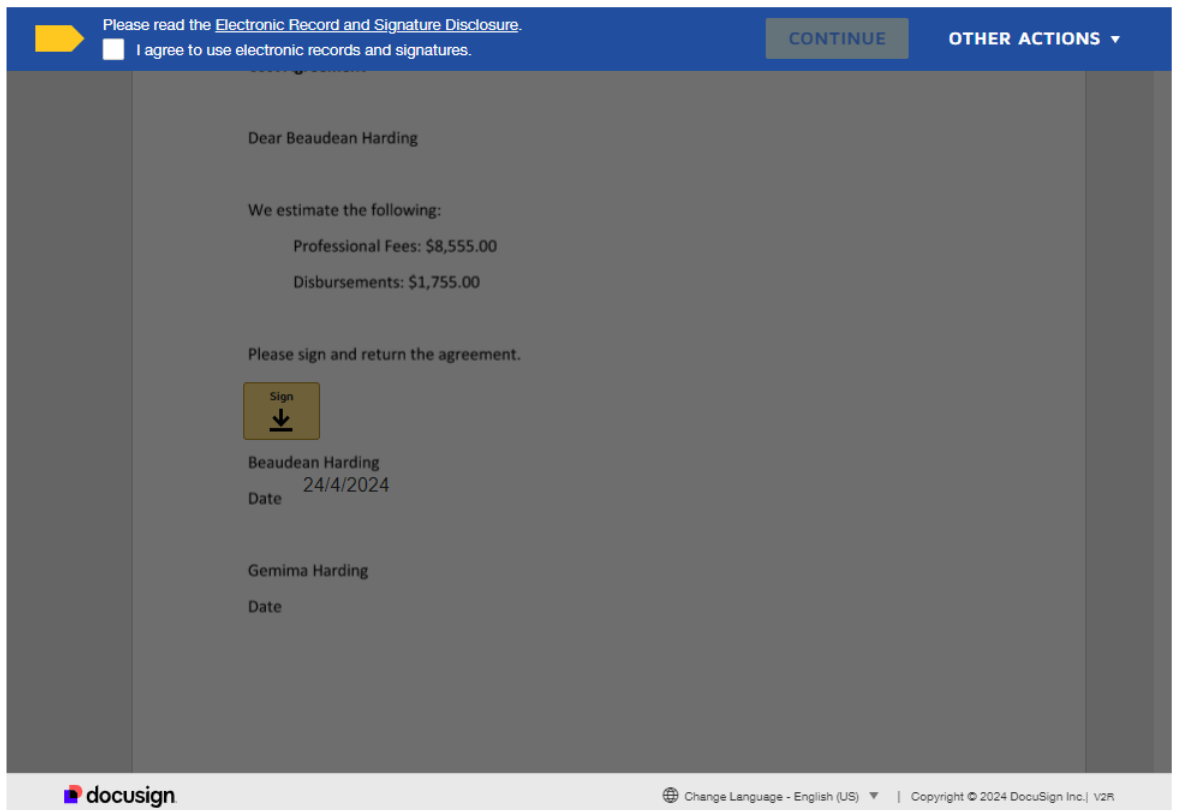


Figure 10: Recipient Reviewing and Signing Document Electronically

9. Upon clicking **CONTINUE**, the recipient may insert the e-signature in the respective signature blocks in the document.

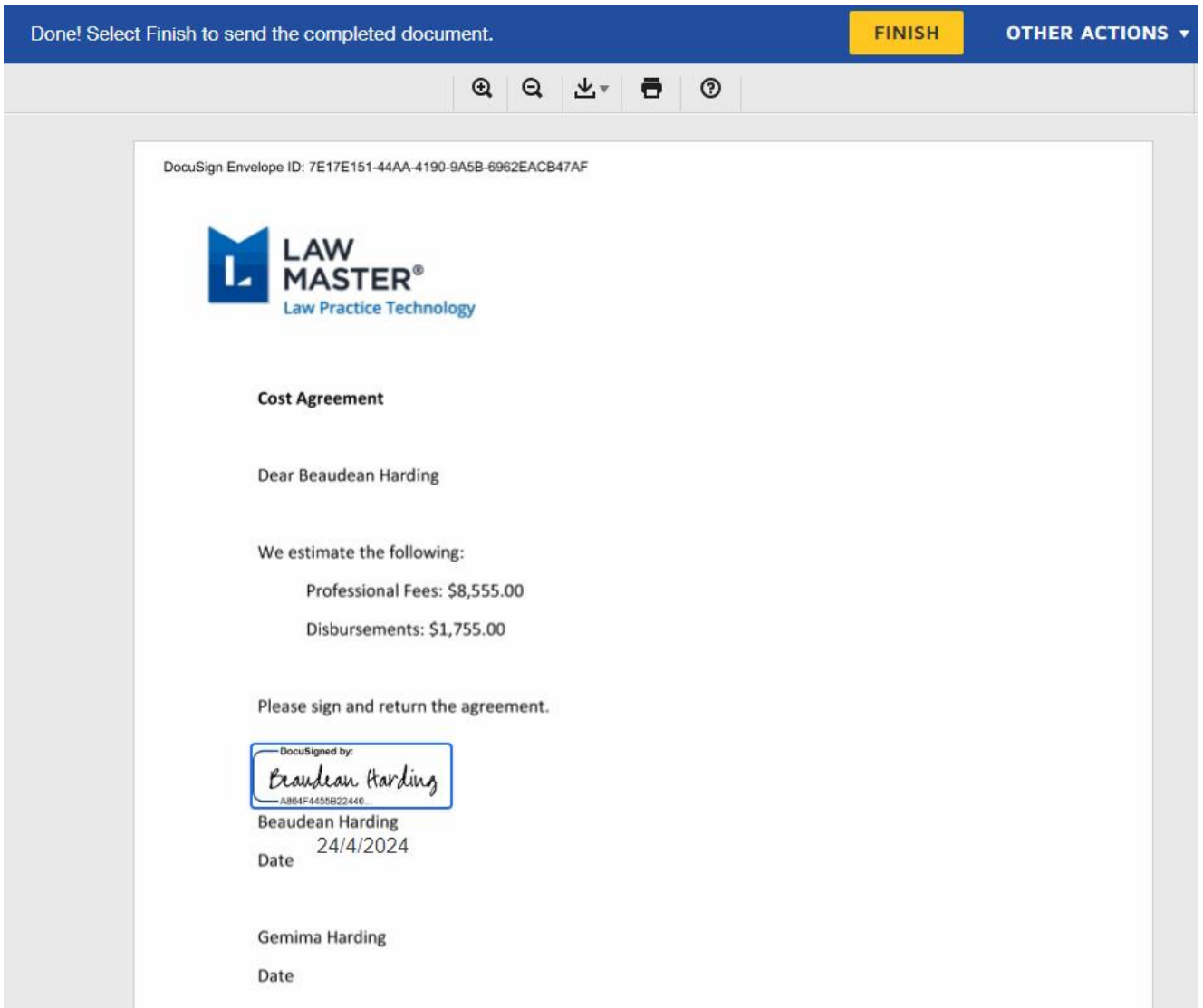



Figure 11: Inserting Signature and Finish

10. The recipient can then click **FINISH** to send back the completed signed copy to the LawMaster sender.

Upon the process completion, that is, when all the parties have agreed and signed the document, the final signed document is emailed to all the parties, and the completed document and certificate are saved to the Matter Folios.

Status Updates in LawMaster

- ❖ When a folio is sent for signature, the status of the Document folio in LawMaster changes to **Finalised**  so that no further changes can be made in the document.
- ❖ With each action in InfoTrack SignIT, that is when the document is sent, and when the signatures are received/declined, a new folio record gets created within the matter in LawMaster with different incremental Reference Nos.
- ❖ Each of the Folio records created is independent and have exclusive version numbers.
- ❖ A SignIT record is also created under the **Searches** tab on matter folios with Provider Reference details and connection to the original folio uploaded to SignIT.
- ❖ Status and Status Details can be viewed from the **Searches** tab on matter folios.

Folios-Signature	Searches Status	Status Details
Sent	To Be Confirmed	To Be Confirmed
Sent	Sent To	Contract sent to authorised parties for signatures.
Signed	Complete	The order completed successfully.
Declined	Declined	One or more authorised parties have declined to sign.

Please Note: The Declined status must be set manually, as there is no way to retrieve this status from the integration. For SignIT searches that queue with the Sent status, right-click and Open URL to see if the document has been declined. If it has been declined, right-click and set the Status to 'Declined'.

- ❖ A **Signature** column has been added to the **Folio Enquiries** grid to indicate the SignIT document status of **'Sent'**, **'Signed'** or **'Declined'**.
- ❖ Once the document is fully signed, the Folio grid, Signature column is set to 'Signed' and the Searches Status is set to 'Complete'. A Folio record is created for the Completed Document and the Precis is appended with '- Completed Document - SIGNED'. A Folio record is also created for the Certificate and the Precis is appended with '- Certificate - SIGNED'. Both the Completed Document and the Certificate are emailed to all Signers.
- ❖ If a Signer declines to sign, the user can manually set the Status to 'Declined' via the SignIT Context Menu on Matter Folios. In this case, the user can cancel Finalise, modify the document and send it again to SignIT for signature.

- ❖ The cost is per document and is passed on to the matter through the InfoTrack integration. The Search Providers (SPR) parameter has additional SignIT Disbursement Codes for GST applicable and GST exempt as defined in the DC parameter.

Document Revisions

The following table lists all the updates made in the document from its previous version.

Version Number	Owner	Updates
V0.1	AXP	First Draft.
V0.2	JPC	Reviewed and commented.
V1.0	AXP	First Document Release.
V2.0 24.04.24	KLF	Updated Screenshots and Wording