Sending a document for signature

18/11/2026 4:56 pm GMT

Summary

This page explains how to send a document to a client for electronic signature directly through Merlin.

Details

Before sending a document for e-signature, ensure it contains both of the following placeholders:

[[SIGN_HERE]] and [[DATE_HERE]]

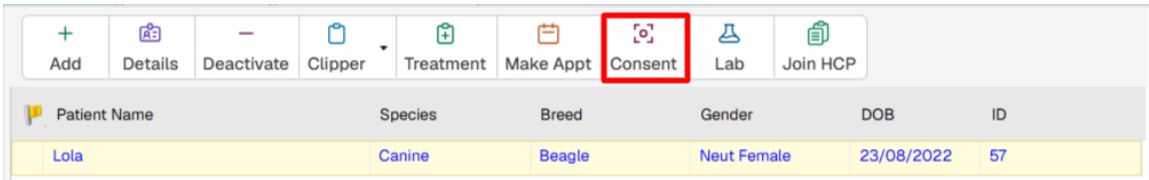
Process

The example below describes sending a Cascade document to a client for e-signature.

1. Search for the relevant client

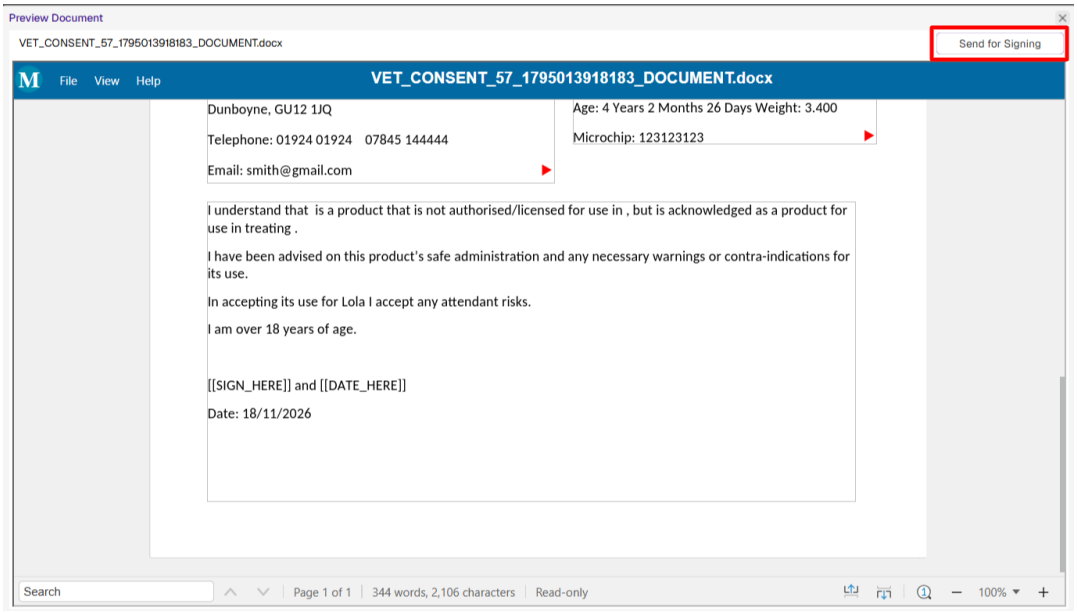
2. Select the patient

3. Select 'Consent':

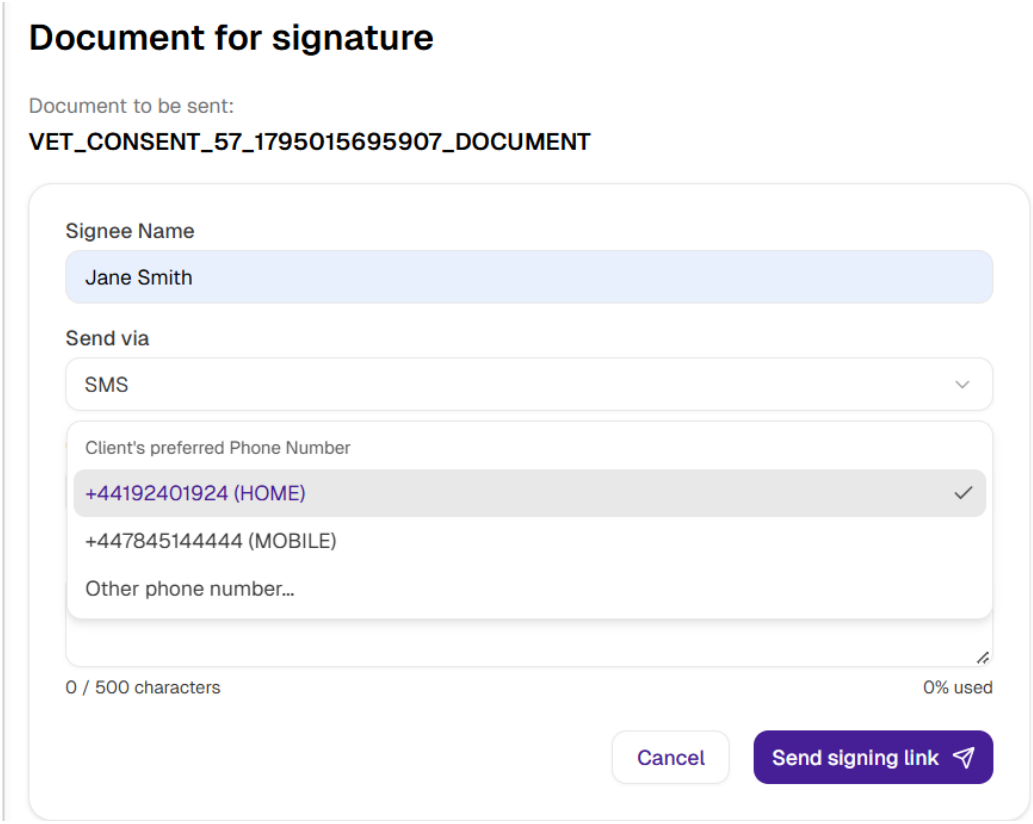


4. Select the required document and press 'Generate'

5. Once the document has generated, press 'Send for Signing':



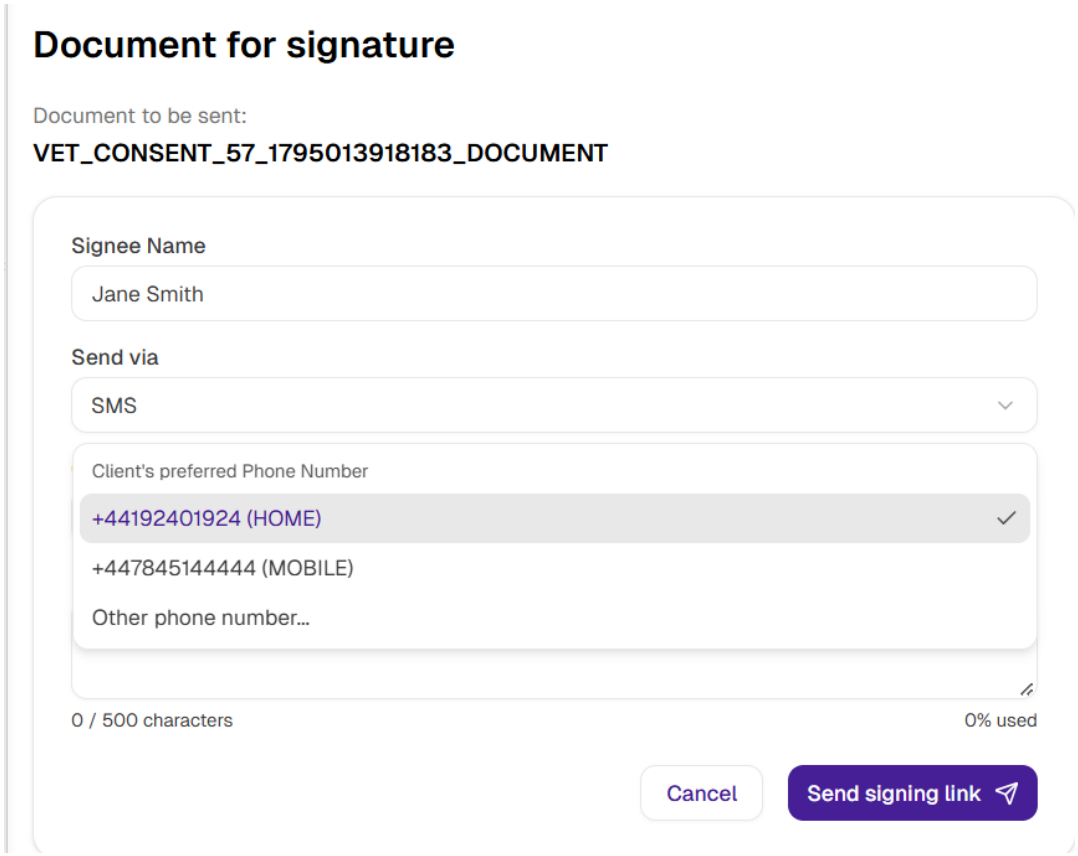
6. Enter the Signee Name. This field is blank by default.



You can send the signing link by SMS or email

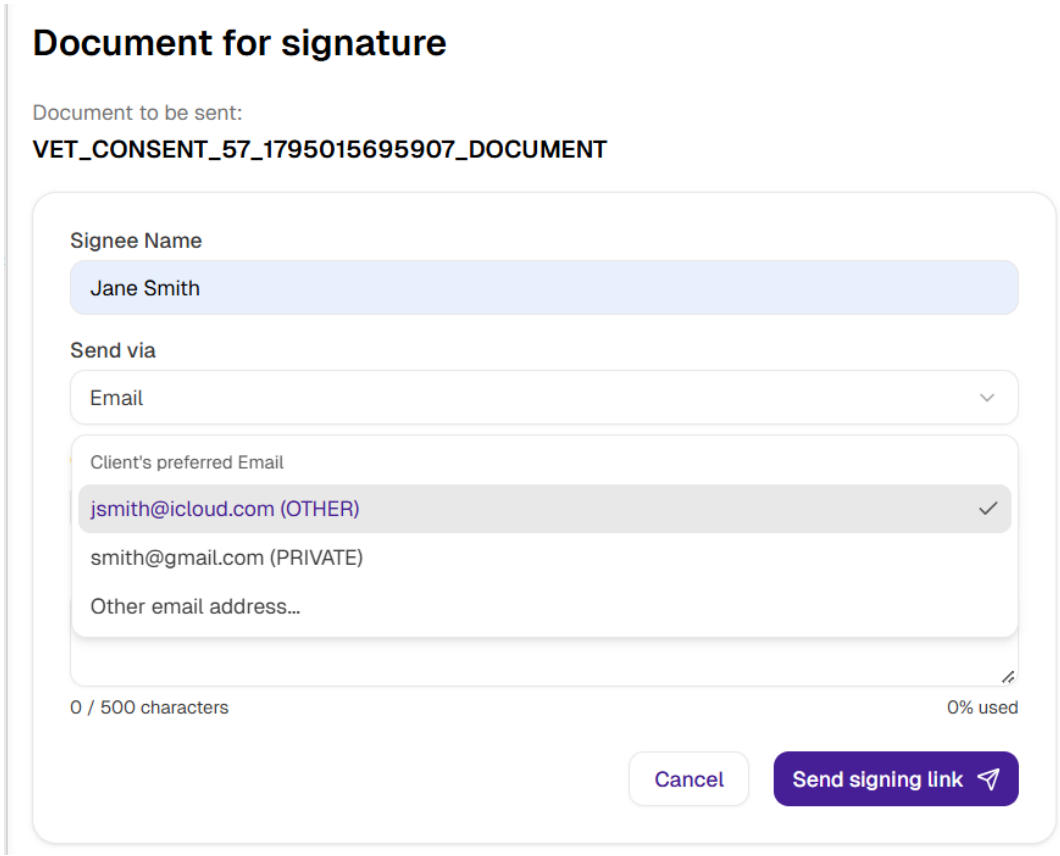
a. If you choose to send via SMS, you will be able to select from any of the mobile numbers saved in the client record. Alternatively, select 'Other phone number' to manually enter a different number.

Please note: Sending a link by SMS incurs a cost.

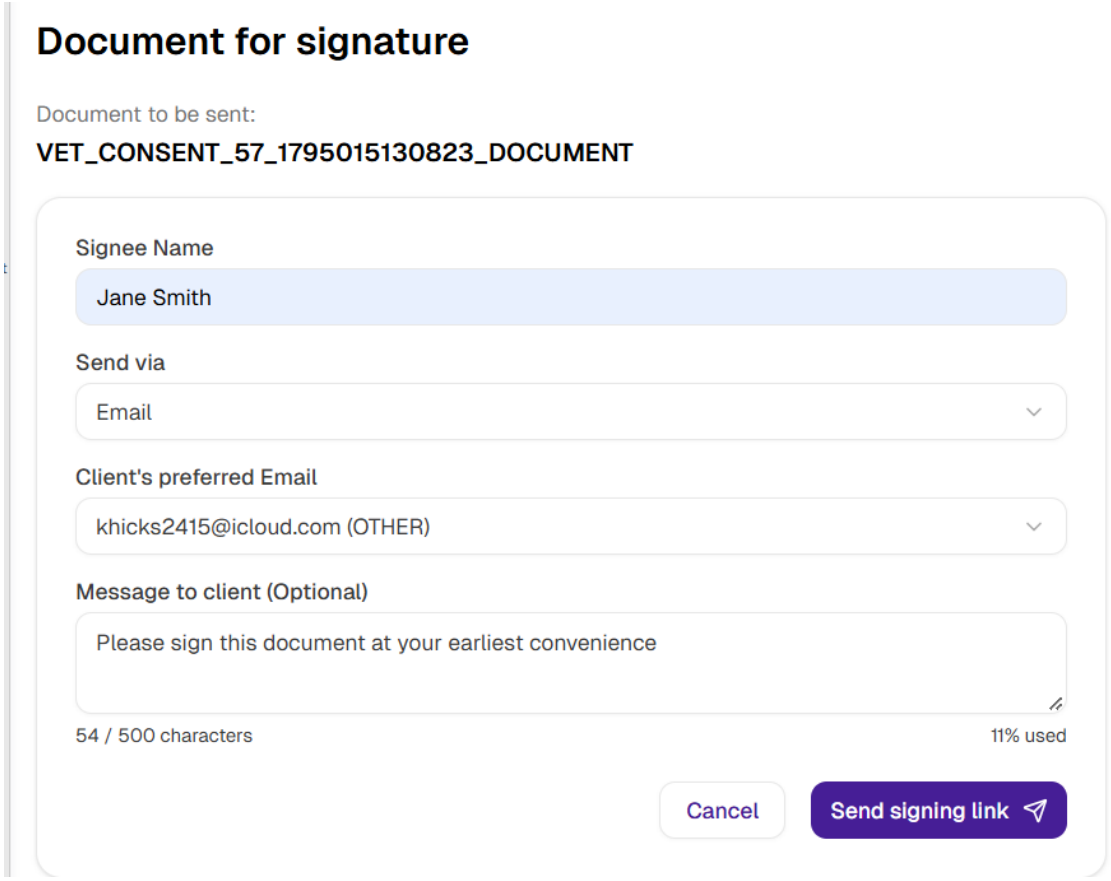


b. If you choose to send via Email, you will also be able to select from any of the email addresses stored in the client record. Alternatively, select 'Other email address' to manually enter a different email address.

Sending a link by email does not incur a cost.



7. Optionally, enter a message for the client. Messages are limited to 500 characters.



8. Once you have reviewed the information, select 'Send signing link'. A confirmation message will appear on screen to confirm that the link has been sent.

