

Getting started guide for administrators



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Introduction

Thank you for choosing **Zoho Sign** to digitally sign documents and automate workflows. This guide will help administrators in setting up their Zoho Sign account and provide the basic information to get started with the app.



Sign up with **Zoho Sign**

Get started with the app by creating a new Zoho account or by signing up with other popular software ecosystems.



The first step in setting up Zoho Sign is to sign up. The process will be slightly different for users who are new to Zoho than for existing Zoho users.

- New to Zoho
- Already a Zoho user

If you are new to Zoho

- If you are new to Zoho, you can create a Zoho account by visiting our [website](#) and filling out the sign up form. You can also use the single sign-on (SSO) offered by other popular software ecosystems such as Microsoft, Google, and LinkedIn while signing up to use their credentials for your Zoho account.
- Your geographical location will be detected based on your IP address.
- Your Zoho account will be created in [one of our datacenters](#) that services your IP location.

The domains of the app across our present datacenters are:

DC	URL
United States (US)	sign.zoho.com
European Union (EU)	sign.zoho.eu
India (IN)	sign.zoho.in
Australia (AU)	sign.zoho.com.au
Japan (JP)	sign.zoho.jp

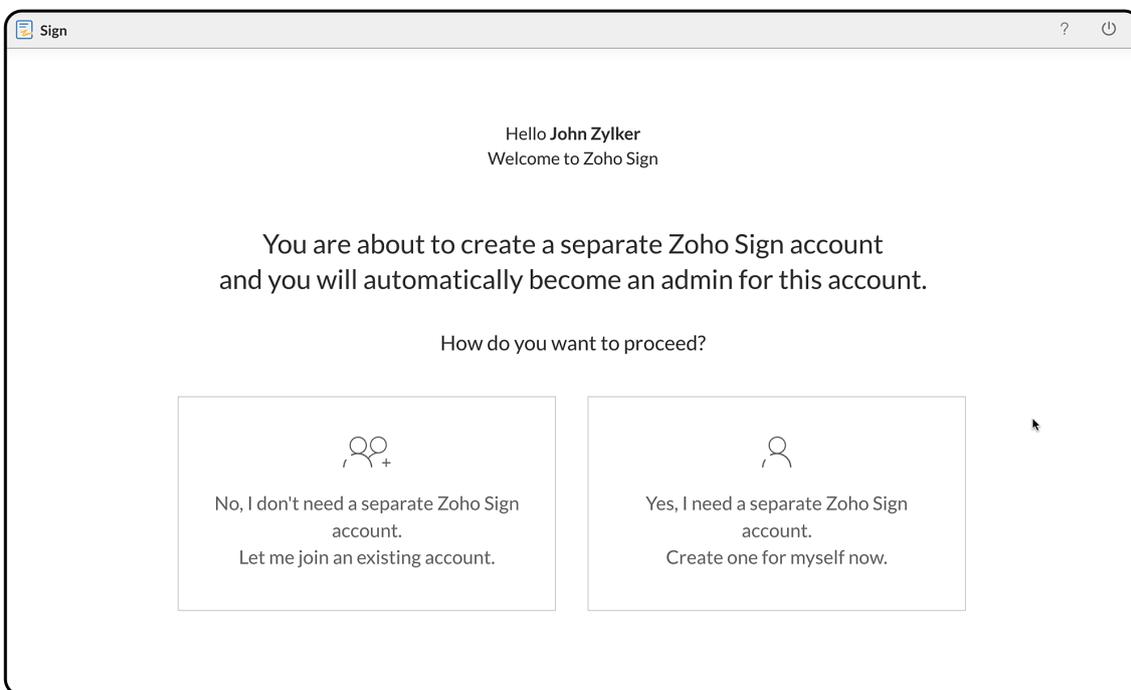
The screenshot displays the Zoho Sign sign-up interface. At the top, there's a navigation bar with the Zoho logo and a link for users with accounts. The main heading is 'Sign up'. Below this, there are three input fields: 'Email *', 'Password *' (with an eye icon for visibility), and '+91 Phone Number *'. A checkbox for 'I agree to the Terms of Service and Privacy Policy' is present. A prominent red 'SIGN UP' button is centered below the form. At the bottom, there are social login options for Google, LinkedIn, and Microsoft. The footer contains the copyright information: © 2023, Zoho Corporation Pvt. Ltd. All Rights Reserved.

If you want your account to be created in a datacenter other than the default one that services your detected location, you can proceed to create an account first and then write to migrations@zohoaccounts.com for migration assistance. There is also an option to move your data from one datacenter to another at a later point.

However, it is always recommended to have your account and data in a datacenter that is local or closest to your region of operation to comply with your local data protection regulations.

Creating your account with Zoho Sign

- ▶ If you are an existing Zoho user, you can sign up with Zoho Sign by visiting our [home page](#) and clicking **ACCESS ZHO SIGN**.



Things to remember:

- ▶ If you wish to create a Zoho Sign account for yourself and add users later, you can choose the second option.
- ▶ If you want to be invited to an existing Zoho Sign organization, you can request the organization's administrator to send you an invite link to join the organization's Zoho Sign account.

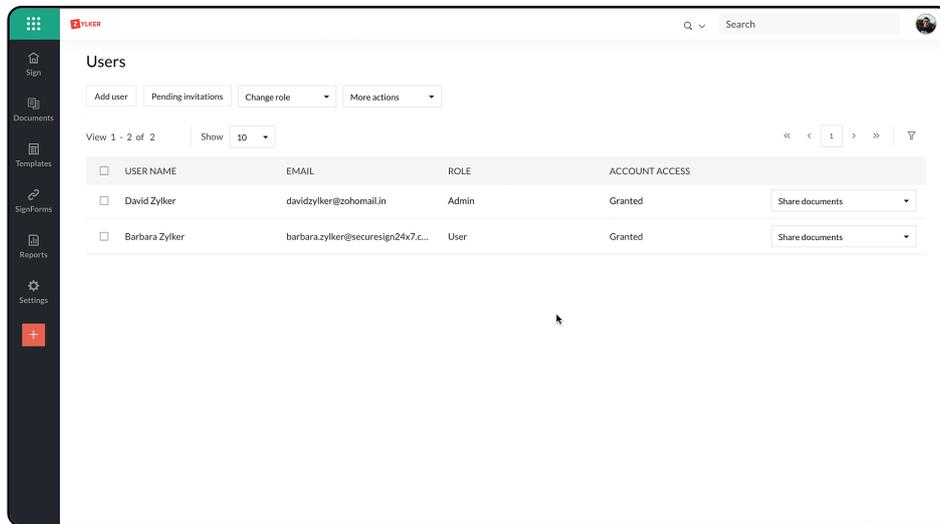
You can find detailed instructions for both setup scenarios in our help documentation [here](#).



User management

Invite and manage users in your account, and configure permissions based on roles and responsibilities.





Adding Users

- Once you have set up your organization in Zoho Sign, the next step is to add other users.
- You can do this by navigating to **Settings > Users > Add user**.

Once other users join, you can assign them roles and grant or remove their access to Zoho Sign. More information can be found in our help documentation [here](#).

You can also add users to your Zoho Sign account by importing users from:

- Zoho Directory
- Zoho One organisation
- Office 365
- Google Workspace

User roles

- Users who have accepted your invite and joined your organization will be listed in the Users section in Zoho Sign.
- You can then define their access levels and privileges by assigning them one of the following roles: admin or user.
- - ⦿ The admin role grants more access and allows the user to make changes to the organization within Zoho Sign.
 - ⦿ Users, on the other hand, have limited access and cannot perform all the actions that admins can.
- To assign a role to a selected user, click Users and then Change role and choose the role to assign.

More information can be found in our help documentation [here](#).

Actions	Admin	User
Send documents for signature, sign documents	✓	✓
Creating document types and folders	✓	✓
Manage documents	✓	✓ (For documents owned by and shared with user)
Creating and managing templates	✓	✗
Using templates	✓	✓ (For templates owned by and shared with user)
Sharing documents /templates with other users	✓	✗
Creating and using SignForms	✓	✗
Generating reports	✓	✓ (For documents owned by user)
Integrating with other applications and digital signature providers	✓	✗
Editing user profile	✓ (Own profile only)	✓ (Own profile only)
Manage subscription details and add-ons	✓	✓ (Own profile only)
Configuring notifications	✓	✓ (For documents owned by user)
Managing webhooks and API tokens and settings	✓	✗
Customizing email templates	✓	✗
Modifying organization details	✓	✗
Modifying legal disclosure	✓	✗
Managing users	✓	✗
Managing contacts	✓	✓ (For contacts owned by user)
Managing account settings	✓	✗
Managing subscription details and add-ons	✓	✗
Accessing and managing trash	✓	✓ (For documents owned by user)



Administrator settings

Customize your account to align with your branding guidelines.



Rebranding

You can rebrand the Zoho Sign application by adding your organization's logo, modifying the legal disclosure for recipients, redirecting your signers and other recipients to a custom page, and customizing the email templates for sign requests with your brand colors and custom text, and also setting up custom domain (CNAME).

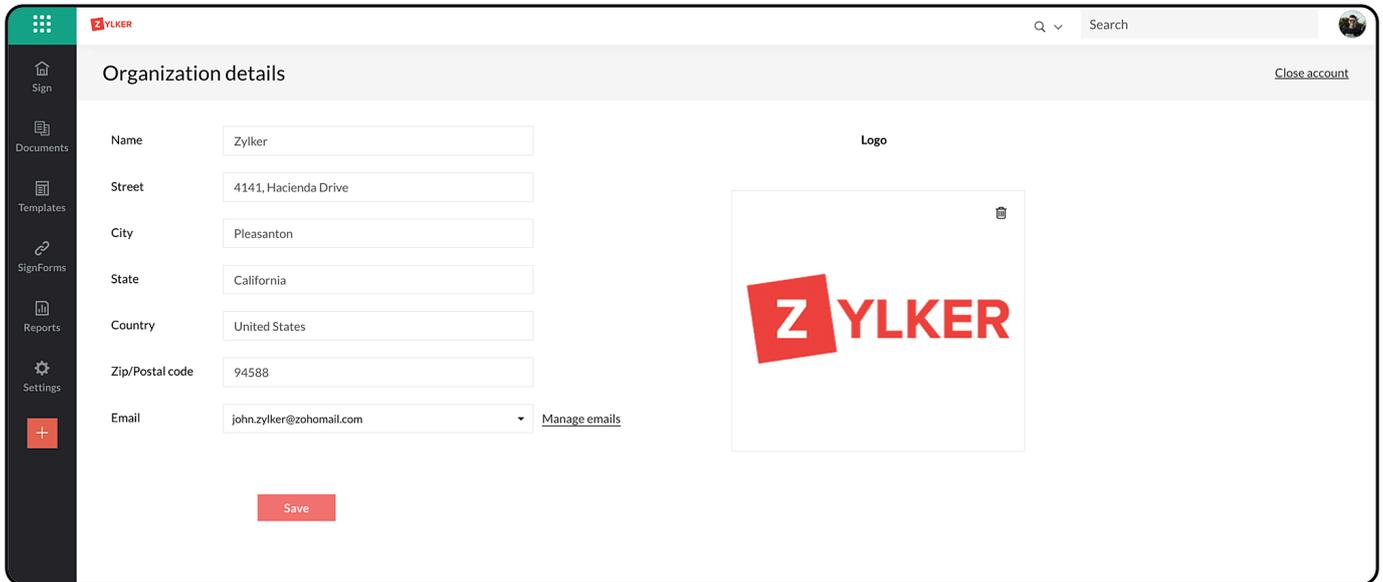
More information on rebranding can be found in our help documentation:

- [Changing the organization logo](#)
- [Customizing email templates](#)
- [Customizing legal disclosure](#)
- [Custom landing pages](#)
- [Custom email domain](#)

Organization details

- Navigate to Settings > Organization details to add or edit your organization's basic details.
- You can also associate multiple email addresses with your organization and close your Zoho Sign account here.
- The organization details present here will be reflected in your completion certificate and emails.
- The organization logo will automatically be added to the app, replacing the Zoho Sign logo, the favicon of the browser tab in which the app is open, your email templates, and your completion certificate.
- Your organization name will reflect in the browser tab in which the app is open.

More information can be found in our help documentation [here](#).



Email domain verification

Zoho Sign now lets you send document signing request emails from your own email domain; either from your organization's email address or your own email address. This helps avoid the emails being flagged as suspicious or spam by the receivers' mailboxes and adds a mark of authenticity to your emails sent from Zoho Sign.

Know more about verifying email domain ownership to send emails from your domain [here](#).



General settings

Set up your profile, signature, contacts, and integrations, and personalize your notification settings.

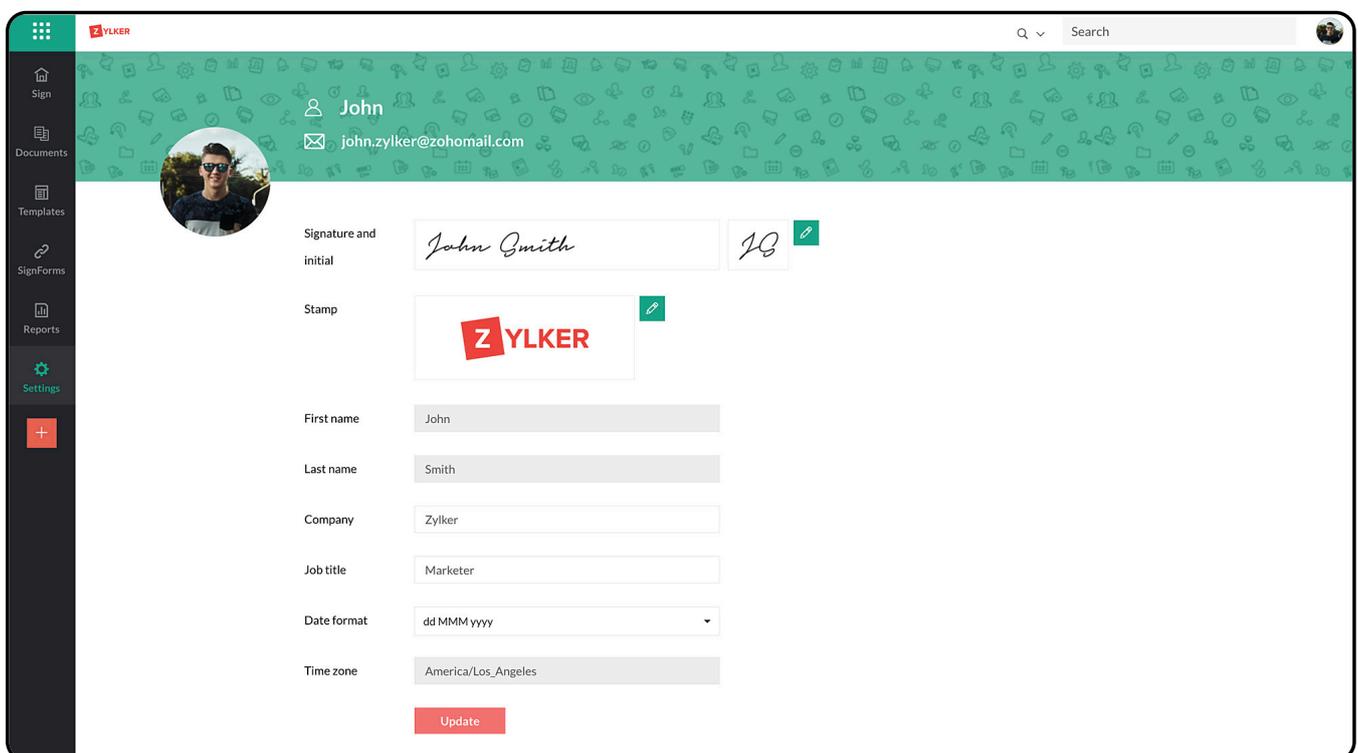


User profile and signature

Navigate to **Settings > Profile** to complete your user profile and add your e-signature to establish your identity in your organization's Zoho Sign account.

Detailed information can be found in our help documentation:

- [Setting up user profile](#)
- [Setting up your e-signature](#)



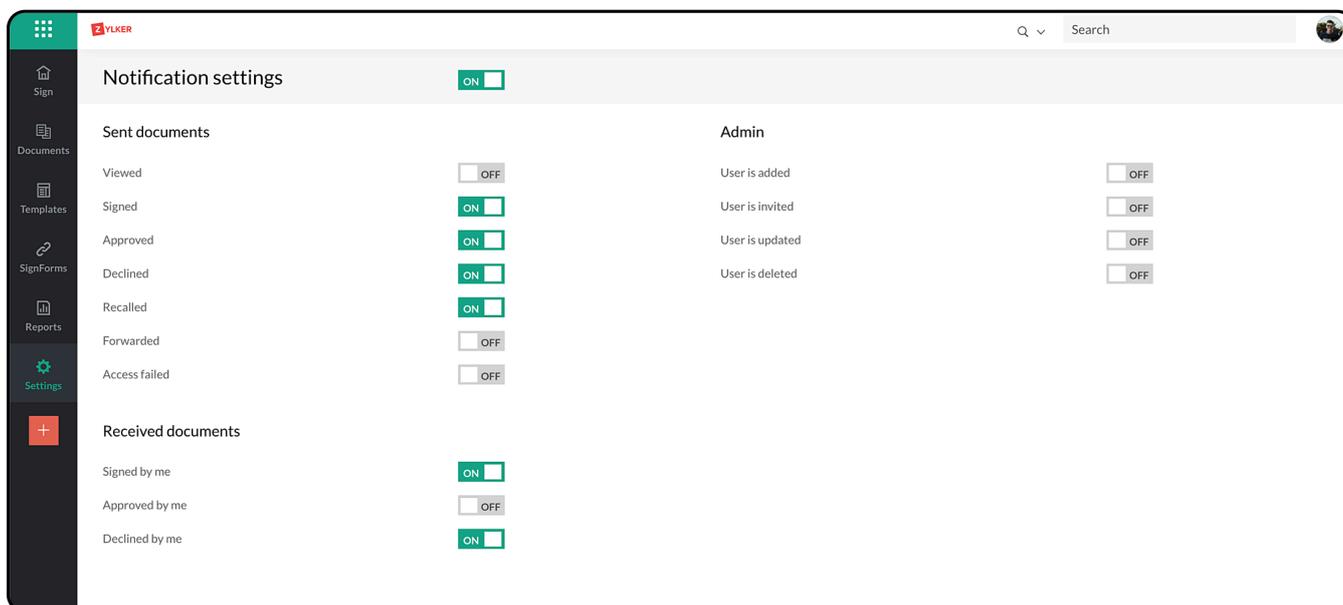
The screenshot shows the Zoho Sign user profile settings page. The page has a dark sidebar on the left with navigation options: Sign, Documents, Templates, SignForms, Reports, and Settings (highlighted). The main content area is white and displays the user's profile information and signature settings. At the top, there is a green header with the Zoho Sign logo and a search bar. The user's name is John, and the email is john.zylker@zohomail.com. The profile picture shows a man with sunglasses. The signature settings include a signature and initial field, a stamp field, and a list of personal information fields: First name (John), Last name (Smith), Company (Zylker), Job title (Marketer), Date format (dd MMM yyyy), and Time zone (America/Los_Angeles). An Update button is located at the bottom of the form.

Signature and initial	<input type="text" value="John Smith"/> <input type="text" value="JS"/>
Stamp	<input type="text" value="Z YLKER"/>
First name	<input type="text" value="John"/>
Last name	<input type="text" value="Smith"/>
Company	<input type="text" value="Zylker"/>
Job title	<input type="text" value="Marketer"/>
Date format	<input type="text" value="dd MMM yyyy"/>
Time zone	<input type="text" value="America/Los_Angeles"/>

Email notifications

- You can personalize the notification settings based on events for both users and administrator actions associated with your Zoho Sign account.
- Navigate to **Settings > Notification settings** to configure personalized notifications.

More information on setting email notifications can be found in our help documentation [here](#).

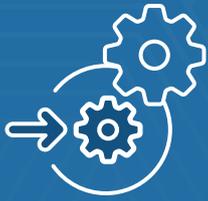


Contacts

- If you or any user in your organization have a set of signatories to whom businesses documents are sent frequently for signatures, their contact information can be added under Contacts.
- Apart from this, all the recipient details are saved in Contacts.

More information on contact management can be found in our help documentation [here](#).

Once all the settings and options have been configured, you have finished setting up your Zoho Sign account. You can now start using it.



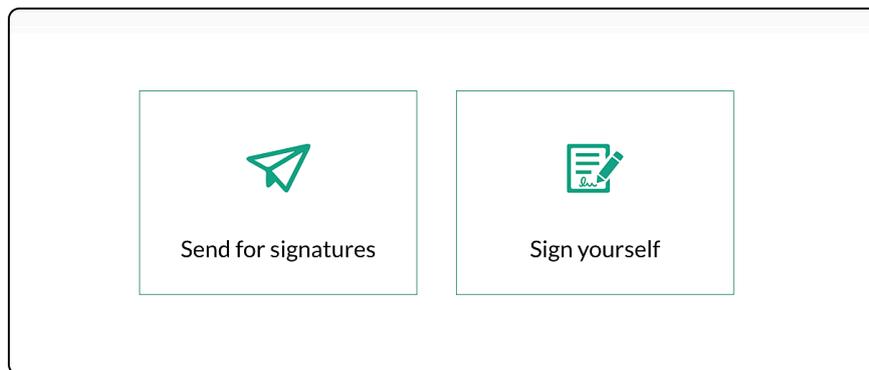
Signing operations

Send and collect signatures on your business documents from your signers via different channels.



Once you have set up your organization's Zoho Sign account, you can start using it to send your business paperwork for digital signature or signing by yourself.

- Send for signature
- Sign yourself
- In-person signing



Send for signature

- This function allows you to send documents to others to request their digital signature or e-signature.
- You can do this by clicking **Send** for signatures on the Zoho Sign dashboard.
- You can then set up an automated sign workflow by adding documents and recipients, assigning signer actions, and configuring other security and accessibility features.

Detailed information on how to send a document for signature can be found in our help documentation [here](#) and you can download sample documents from [here](#).

Sign yourself

- This function allows you to sign documents yourself digitally.
- You can access it by clicking **Sign yourself** on the Zoho Sign dashboard.
- You can then upload the document, add your signer fields and send it via email once you are done.

Detailed information about signing a document yourself can be found in our help documentation [here](#).

In-person signing

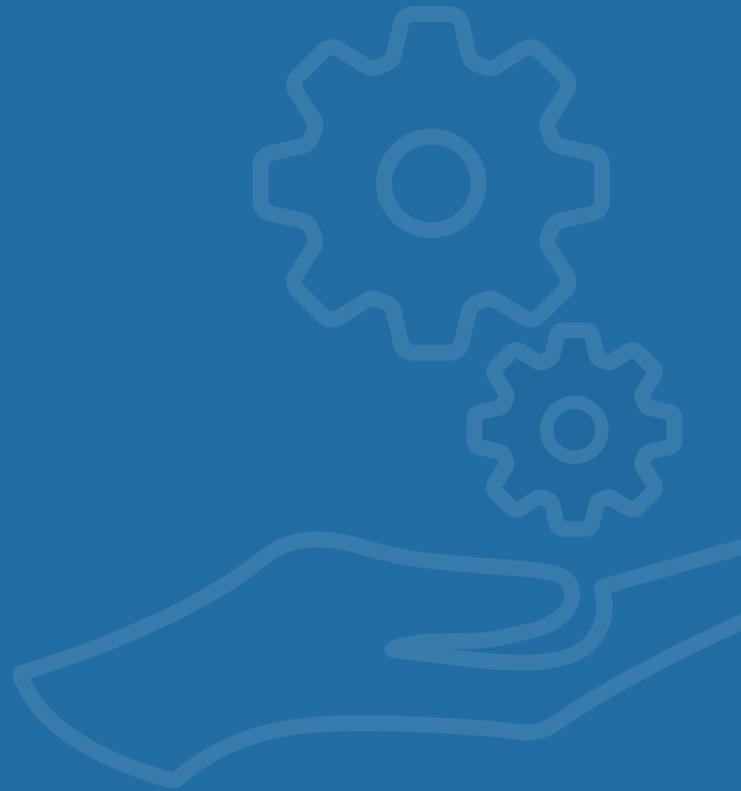
- ▶ You can set up an in-person signing session by choosing the In-person signer role when setting up a sign workflow.
- ▶ This feature allows you to digitally assign a document to field agents to collect signatures from clients and other executives in person. The signer details are optional in this case.
- ▶ This also supports collection of signatures offline via the Zoho Sign mobile apps (which we talk about later in this document).

Detailed information about in-person signing can be found in our help documentation [here](#).



Advanced features

Save frequently used documents as templates and send them to up to 1000 recipients with the bulk send feature.



Templates

- If your business needs to send documents that are frequently reused to different recipients with little change in their contents or format, you can have those documents saved as a template, then send for signature in just a few clicks.

Detailed information on creating and using templates can be found in our help documentation [here](#).

SignForms

- SignForms feature allows you to create a form-based, self-service document signing process that can be embedded on websites or accessed through a secure, public URL.

Detailed information on SignForms can be found in our help documentation [here](#).

Bulk send

- If your business needs to send one or more documents with the same form fields to multiple recipient in one go, the bulk send feature will be helpful for you to achieve this.
- You can add a list of recipients to sign workflows by clicking Add bulk recipients and uploading a CSV file.
- This allows you to generate individual copies of a document by merging recipient information from the CSV file onto the signer fields and send them for signature collection.

More information on bulk sending can be found in our help documentation [here](#).



Other operations

Manage your documents, generate comprehensive reports, and track your subscription details.



Document management

- You can access all your Zoho Sign documents by clicking **Documents** in the left navigation bar.
- This will take you to a list of all the documents associated with your Zoho Sign account.
- You can then select individual documents and perform various actions on them.

Detailed information on document management can be found in our help documentation [here](#).

Trash management

- You can visit **Settings > Trash** to access your trash which contains all the documents and templates you delete.
- You can restore deleted items from trash or delete them permanently.

More information on trash management can be found in our help documentation [here](#).

Reports

- You can access the reports section by clicking **Reports** on the left navigation bar.
- This option allows you to generate comprehensive reports for all the documents signed and sent from your Zoho Sign account.
- You can also filter the reports based on various conditions and set a custom duration.

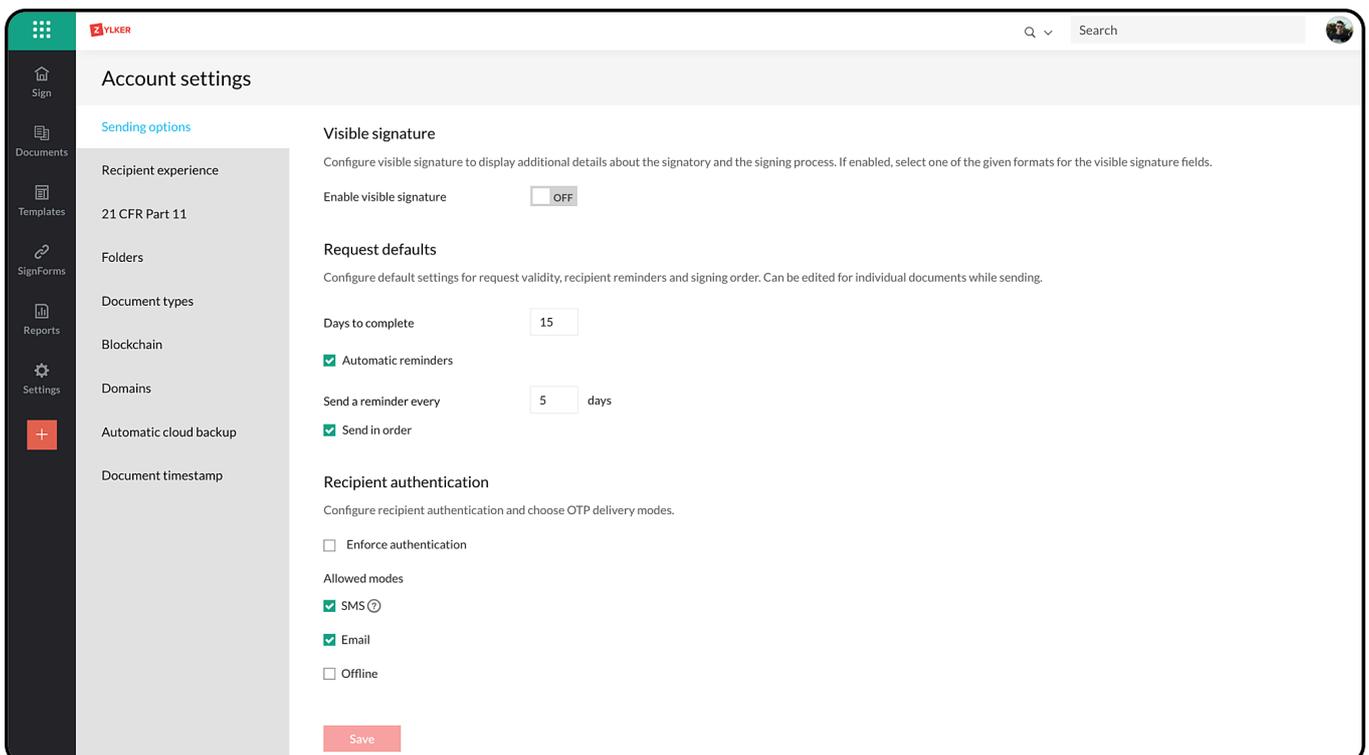
Detailed information on document management can be found in our help documentation [here](#).

Account settings

- Navigate to **Settings > Account settings** to modify the default settings for sign requests, customize the signer experience, and configure other domain-related options.
- Any changes you make to these settings will apply to all users in your organization in Zoho Sign.

Detailed information can be found in our help documentation:

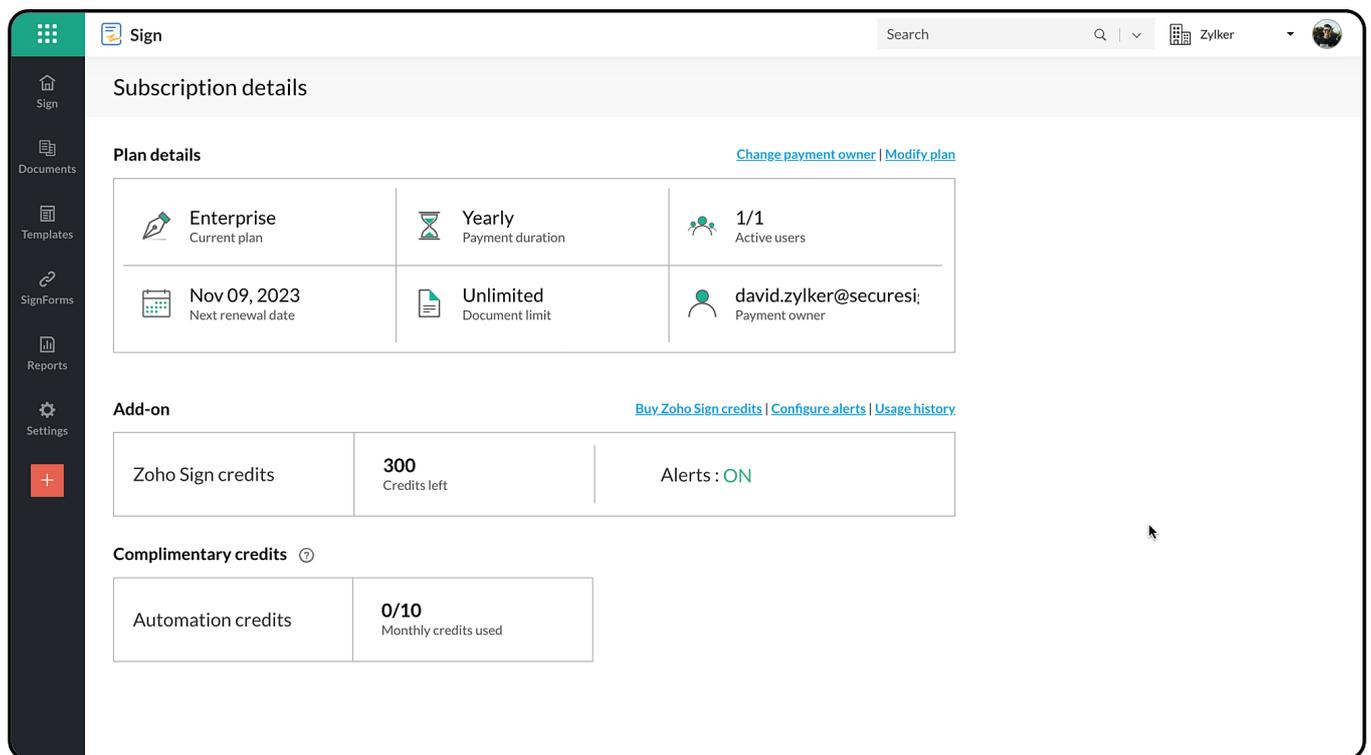
- [Sending options](#)
- [Recipient experience](#)
- [21 CFR Part 11](#)
- [Folders](#)
- [Document types](#)
- [Blockchain timestamping](#)
- [Automatic cloud backup](#)
- [Document timestamping](#)



Subscription details

- Navigate to **Settings > Subscription details** to view and manage your Zoho Sign subscription plan.
- This section allows you to upgrade or downgrade your subscription, change your payment owner, and manage your add-ons.

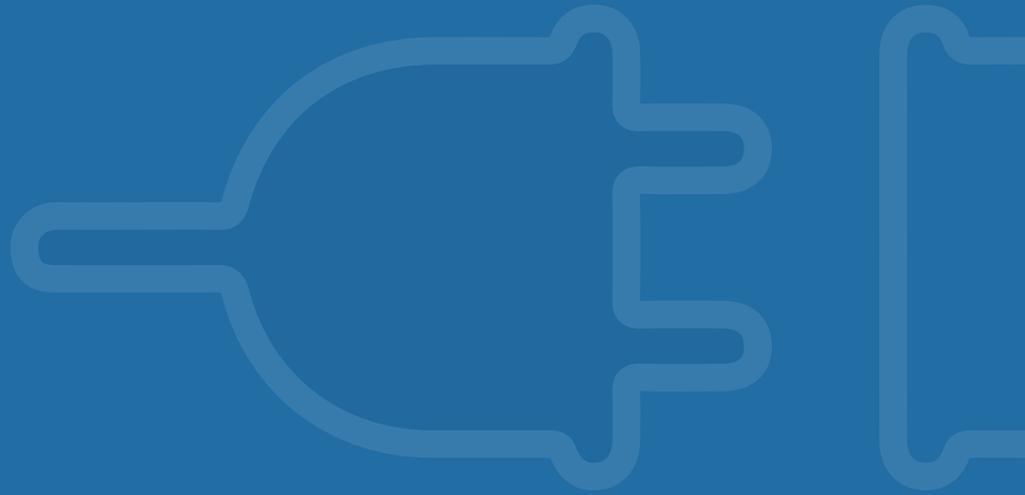
More information about subscriptions and payments can be found in our help documentation [here](#).





Integrations

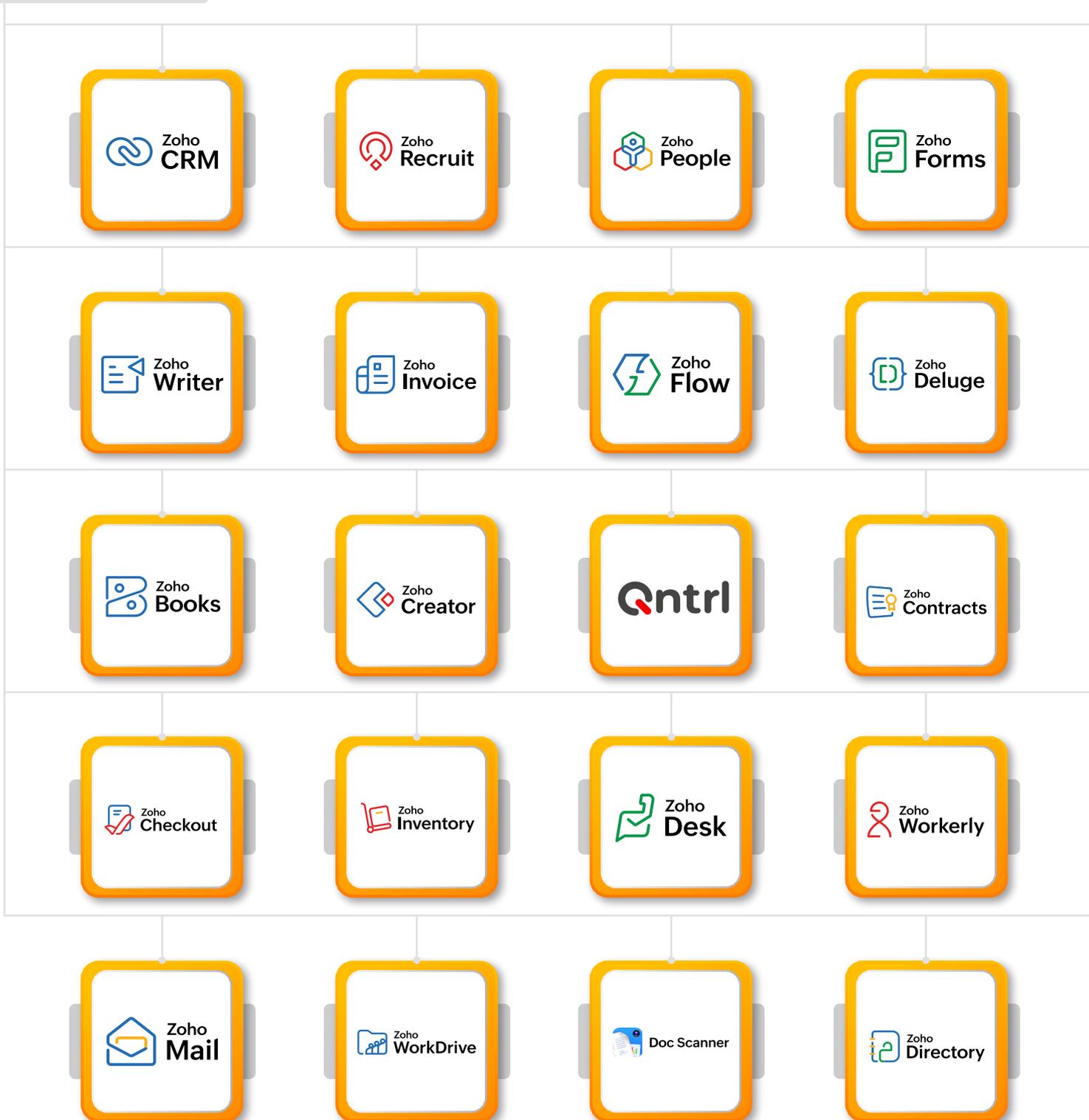
Integrate with your favorite Zoho applications and popular third-party applications.



- Zoho Sign integrates with other Zoho apps and popular third-party services to allow you to import users and documents and perform signing operations in those apps.
- You can find a list of all the integrations available below.

For detailed information on setting up an integration, click the link to visit the [page](#) in our help documentation.

Zoho Apps



Google Apps



Workspace



Gmail



Google Drive

Microsoft Apps



Microsoft 365



Teams



Outlook



Power Automate



OneDrive

Other third party integrations



Box



HubSpot



Pipedrive



Freshsales



Vtiger



Zendesk Sell



Zapier



Make (formerly Integromat)



Formstack Documents



Dropbox



Integrately



Pabbly Connect



Open AI

Digital signature providers and identities



Aadhaar eSign



eSign via eMudhra eKYC



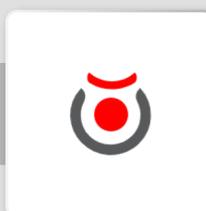
TrustFactory



Sign with Singpass



InfoCert



Uanataca



eID Easy



PFX



IDology



Signicat with EU eID



Swisscom



USB signatures

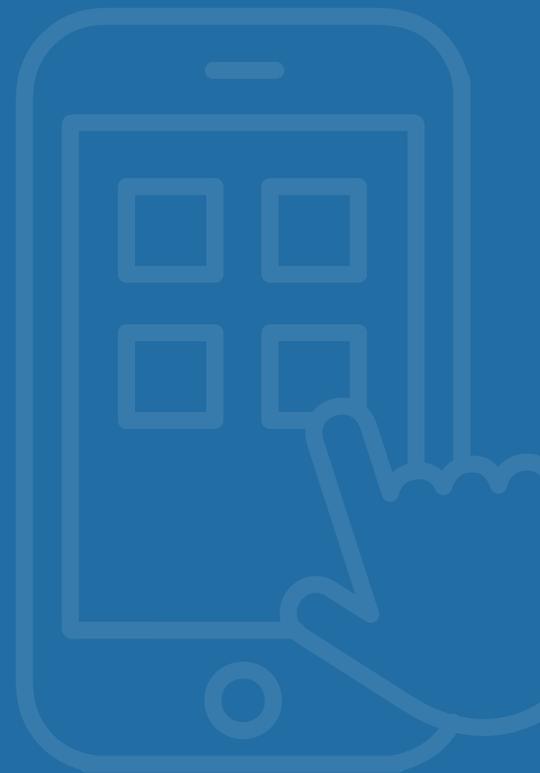


SignDesk



Mobile access

Learn how to install and use the Zoho Sign mobile app to sign documents from anywhere.



Mobile access

- ▶ Zoho Sign offers native mobile apps that allow you to sign documents or send documents for signature on the go.
- ▶ The mobile apps also allow you to access and download your documents, track signature status, and conduct in-person signing sessions.

You can download the Zoho Sign apps and get related help documents from these links:

Mobile application	Download link	Help document
iPad OS	Link	Link
iOS	Link	Link
macOS	Link	Link
Android	Link	Link
Windows	Link	Link



APIs and SDKs

Integrate with your in-house apps via APIs, SDKs, and webhooks.



Zoho Sign is entirely built on top of its own REST APIs, which enables you to build custom integrations with your websites and in-house apps using the APIs, associated webhooks, and our SDKs.

Access Zoho Sign's API documentation [here](#) and SDK's [here](#).

You can test the Zoho Sign API using our collections available in the following tools:

- [Postman Public Workspace](#)
- [OpenAPI on SwaggerHub](#)



Paid training **and certification**

Enroll for professional training and certification.



If you feel like you need a complete hands-on training of everything covered here in this guide, Zoho Sign now offers specialized one-on-one paid training for administrators, developers, and users.

[Book your slot here](#)

Additionally, as an administrator or developer, you can get certified in setting up and implementing Zoho Sign for organizations. To do this, please register for the paid training session and participate in the certification assessment that follows the training modules.

Contact us

If you experience any difficulties with setting up your Zoho Sign account, reach out to us for assistance. [Contact us](#).



zoho.com/sign/contact.html



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