

GETTING STARTED | GUIDE



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Introduction

Thank you for choosing Zoho Sign to digitally sign your business paperwork and go paperless.

The purpose of this guide is to walk you through the initial setup process for Zoho Sign and provide you with other basic information to help you get started with the app.

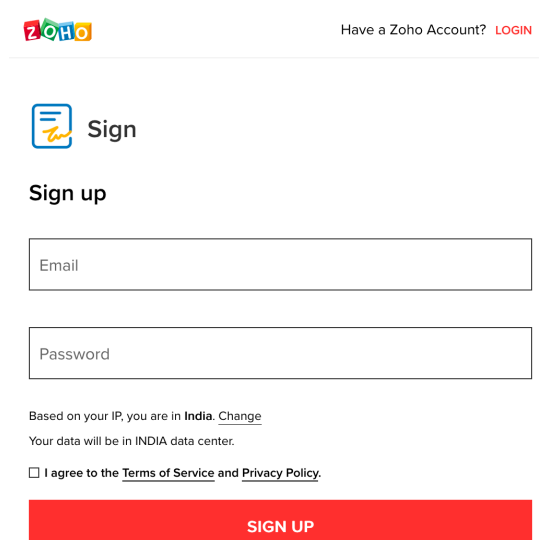
Sign up instructions

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.


Option 1: If you are new to Zoho, you can create a Zoho account by visiting our [website](#) and clicking **Free Sign Up**. Your geographical location will be filled in based on your IP address. Your Zoho account is created in the data center closest to the location displayed. The domains for our present data centers are:


- zoho.com: United States
- zoho.eu: European Union
- zoho.in: India
- zoho.au: Australia

If you want your account to be created in a data center other than the one that corresponds to your detected location, you can manually choose your location and proceed.



The screenshot shows the Zoho Sign sign-up interface. At the top left is the Zoho logo, and at the top right is a link for users with an account. The main heading is 'Sign', followed by 'Sign up'. There are two input fields for 'Email' and 'Password'. Below these fields, a message indicates the user's location is detected as India, with a link to change it. A checkbox for agreeing to terms and privacy policy is present. A large red button at the bottom is labeled 'SIGN UP'.

 Have a Zoho Account? [LOGIN](#)

 Sign

Sign up

Email

Password

Based on your IP, you are in **India**. [Change](#)
Your data will be in INDIA data center.

☐ I agree to the [Terms of Service](#) and [Privacy Policy](#).

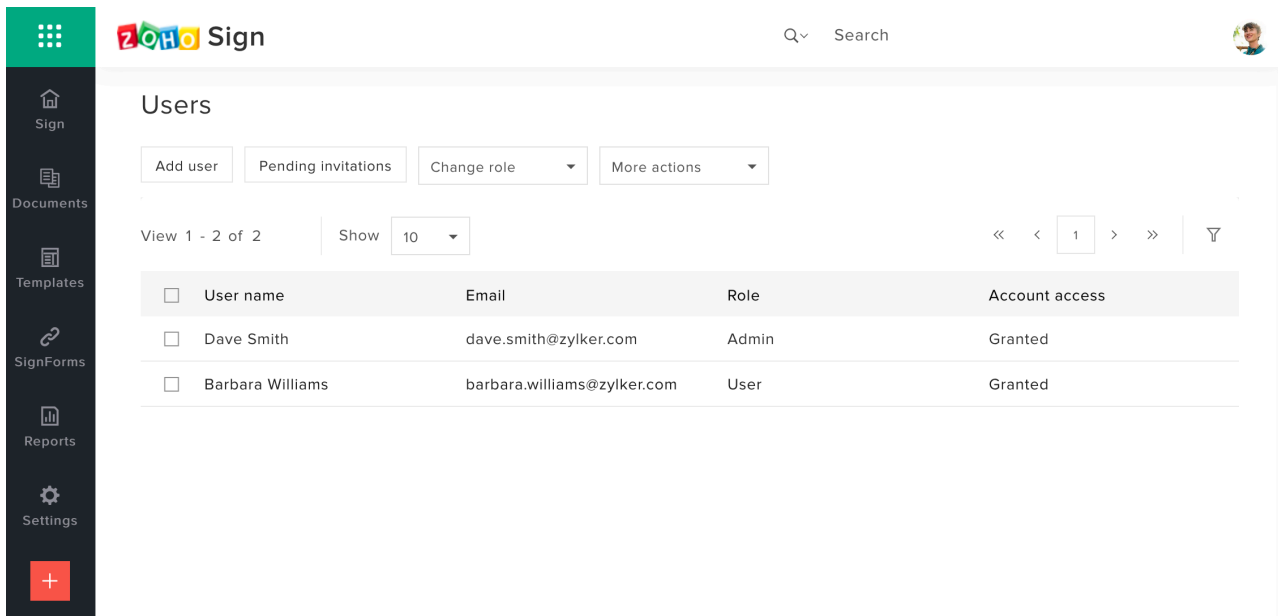
SIGN UP

Option 2: If you are an existing Zoho user, you can sign up with Zoho Sign by visiting our [homepage](#) and clicking **ACCESS ZOHO SIGN**. If you are the administrator for your organization, you will be prompted to enter its name and create the organization in Zoho Sign. Other users will require an invitation to join your organization in Zoho Sign. manually choose your location and proceed.

The screenshot shows a Zoho Sign sign-up page. At the top, it says "Hello John Martin" and "Welcome to Zoho Sign". Below this, there is a vertical line separating two options. On the left, it says "Please contact your organization's administrator for an invite to join Zoho Sign." On the right, it says "Enter the name of your organization for which an account has to be created". Below this text is a text input field labeled "Organization name" and a red button labeled "Save and proceed".

Note: If you or another user in your organization creates or has a separate individual Zoho Sign account, the account cannot be merged or mapped with your organization's account. The owner of the individual account will need to close the individual account and sign up again by accessing the invite link sent by the organization administrator to join your organization's Zoho Sign account. When an account is closed, all the documents and data associated with it will be permanently deleted. We therefore recommend you download your data before closing your account. You can find detailed instructions for both setup scenarios in our help documentation [here](#).

User management



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 > Admin > Users**. Once other users join, you can assign them roles and grant or remove their access to Zoho Sign. More information about adding users can be found in our help documentation:

- [Adding users manually](#)
- [Importing users from Office 365](#)
- [Importing users from G Suite](#)

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](#).

Action	Admin	User
Send documents for signature, sign documents	✓	✓
Use templates, bulk send and in-person signing	✓	✓
Manage documents	✓	✓ (Owned by user)
Generate reports	✓	✓ (Owned by user)
Manage contacts	✓	✓ (Owned by user)
Create templates	✓	✗
Create SignForms	✓	✗
Manage users	✓	✗
Manage account settings	✓	✗
Manage subscription details and add-ons	✓	✗
Modify organization details	✓	✗
Modify legal disclosure	✓	✗
Customize email templates	✓	✗
Manage webhook and API settings	✓	✗

Access privileges of user roles

Administrator settings

After you add users to your organization in Zoho Sign, you need to configure the various settings and options in the application to suit your usage requirements.

Rebranding

You can rebrand the Zoho Sign application by adding your organization's logo, modifying the legal disclosure for recipients, and customizing the email templates for sign requests with your brand colors and custom text.

You can add your organization's logo in the **Settings > Admin > Organization details** section. More information on rebranding can be found in our help documentation:

- [Modifying legal disclosure](#)
- [Customizing email templates](#)

Organization details

Navigate to **Settings > Admin > Organization details** to add and edit your organization's basic details. You can also associate multiple email addresses with your organization and close your Zoho Sign account here. More information on this can be found in our help documentation [here](#).

Organization details

[Close account](#)

Name

Zylker Industries

Street

6800 Burleson Road, Building 310, Suite 200

City

Austin

State

Texas

Country

United States

Zip/Postal code


78744

Email

sales-team@securesign24x7.com

Manage emails

Logo



Save

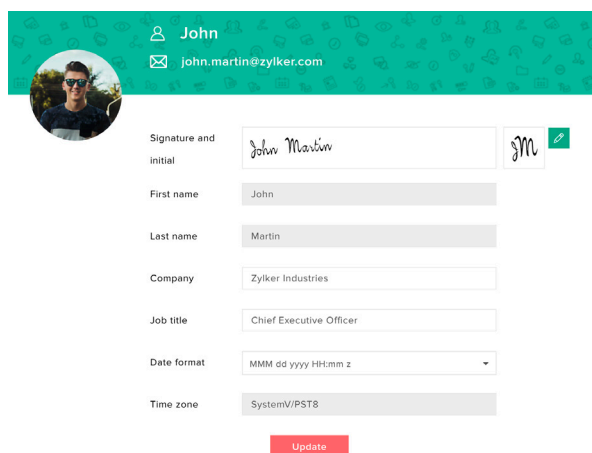
Email domain verification

You can add multiple email addresses to your organization in Zoho Sign to use to send documents for signature. You can configure the sender email address by going to **Settings > Admin > Account settings**. However, when a third-party service like Zoho Sign sends an email on your behalf, there's a risk of the email being flagged as a phishing attempt and being marked as spam by the recipients' email service. You can prevent this from happening by verifying ownership of your organization's email domains using the DomainKeys Identified Mail (DKIM) method. Detailed step-by-step information on DKIM verification can be found in our help documentation [here](#).

General settings

Navigate to **Settings > General > 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](#)



John
john.martin@zylker.com

Signature and initial: John Martin

First name: John

Last name: Martin

Company: Zylker Industries

Job title: Chief Executive Officer

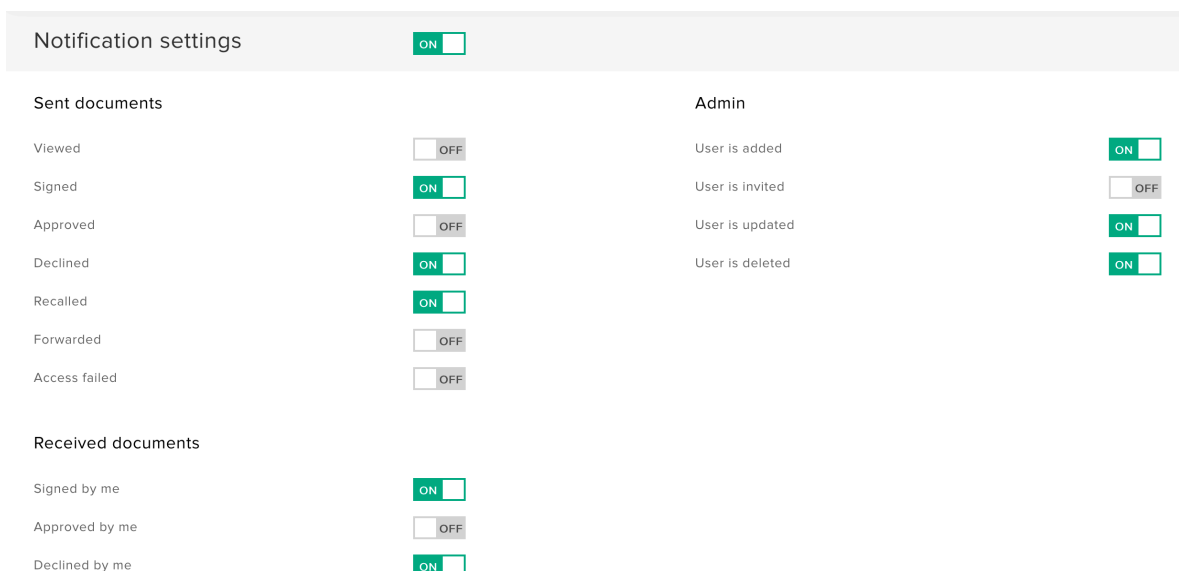
Date format: MMM dd yyyy HH:mm z

Time zone: SystemV/PST8

Update

Email notifications

Navigate to **Settings > General > Notification settings** to configure personalized, event-based email notifications for both user and administrator actions associated with your organization's Zoho Sign account. More information on setting email notifications can be found in our help documentation [here](#).



Notification settings ☒

Sent documents

Viewed	<input type="checkbox"/> OFF
Signed	<input checked="" type="checkbox"/> ON
Approved	<input type="checkbox"/> OFF
Declined	<input checked="" type="checkbox"/> ON
Recalled	<input checked="" type="checkbox"/> ON
Forwarded	<input type="checkbox"/> OFF
Access failed	<input type="checkbox"/> OFF

Received documents

Signed by me	<input checked="" type="checkbox"/> ON
Approved by me	<input type="checkbox"/> OFF
Declined by me	<input checked="" type="checkbox"/> ON

Admin

User is added	<input checked="" type="checkbox"/> ON
User is invited	<input type="checkbox"/> OFF
User is updated	<input checked="" type="checkbox"/> ON
User is deleted	<input checked="" type="checkbox"/> ON

Contacts

Navigate to **Settings > General > Contacts** to add and manage contacts for other users in your organization or business signatories you frequently send documents to for signature. 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

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 it yourself.



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](#).

Sign yourself

This function allows you to digitally sign documents yourself. 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. Detailed information about in-person signing can be found in our help documentation [here](#).

Advanced features

Templates

You can access the templates feature by clicking **Templates** on the left navigation bar. This feature allows you to convert frequently used document formats into reusable templates which you can then send for signature in just a few clicks. More information on creating and using templates can be found in our help documentation [here](#).

SignForms

You can access the SignForms feature by clicking **SignForms** on the left navigation bar. This 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

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

Document management

You can access all your Zoho Sign documents by clicking **Documents** on 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 > General > 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 > Admin > 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. More information on configuring account settings can be found in our help documentation [here](#).

Account settings

Sending options

Recipient experience

Domains

Request defaults

Configure default settings for request validity and recipient reminders.

Time to complete15 days

☒ Automatic reminders

Send a reminder every5 days

Recipient authentication

Configure recipient authentication and choose OTP delivery modes.

☐ Enforce authentication

Allowed modes

☒ SMS

☒ Email

☒ Offline

Email delivery

Choose the email address from which you want to send documents for signatures.

Send for signatures fromZoho Sign notification email address







Subscription details

Navigate to **Settings > Admin > 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](#).

Subscription details

Plan details

[Change payment owner](#) | [Modify plan](#)

 Enterprise Current plan	 Monthly Payment duration	 1/2 Active users
 Feb 29, 2020 Next renewal date	 Unlimited Document limit	 Payment owner john.martin@zylker.com

Add on

[Buy API credits](#) | [Buy SMS credits](#) | [Configure alerts](#)

API	100 Credits left	Alerts : ON
SMS	100 Credits left	Alerts : ON

Integrations

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

CRM	People	Recruit	Workerly
Mail	Books	Invoice	Inventory
Writer	Forms	WorkDrive	Creator (Deluge)
Flow	Orchestly		

Cloud storage

Google Drive	OneDrive	DropBox	Box
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Software suites

G Suite	Office 365
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Other

Microsoft Teams	Zapier	Formstack Documents
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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 from these links:

- [iOS](#)
- [iPad OS](#)
- [macOS](#)
- [Android](#)

Contact details

If you experience any difficulties getting started with or setting up Zoho Sign for your organization or when using the app, reach out to us for assistance.

www.zoho.com/sign/contact.html

support@zohosign.com

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