



IT technicians · Zoho One optimization



Zoho Sign

User and Administrator Manual

→ [Go to the index](#)

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Index — English version

Click any title to jump directly to that section. Each chapter ends with a “Back to index” link.

PART 1 — USER GUIDE

1. Introduction and access

- 1.1 About this manual
- 1.2 What is Zoho Sign?
- 1.3 Signing in

2. Interface and navigation

- 2.1 Interface elements
- 2.2 Document statuses

3. Sending a document for signature

- 3.1 Preparing the request
- 3.2 Sending options

4. Recipients and signing order

- 4.1 Recipient types
- 4.2 Setting the signing order
- 4.3 In-person signing

5. Fields and document preparation

- 5.1 Available fields
- 5.2 Placing fields
- 5.3 Text tags

6. Signing a document

- 6.1 Signing a document you received
- 6.2 Sign yourself
- 6.3 Other recipient actions

7. Templates

- 7.1 Creating a template
- 7.2 Using a template

8. SignForms (self-service forms)

- 8.1 Principle
- 8.2 Creating a SignForm

9. Tracking, reminders and reports

- 9.1 Tracking a document
- 9.2 Reminding, correcting or cancelling
- 9.3 Reports

10. Signer identity verification

- 10.1 Available methods
- 10.2 Enabling verification for a recipient

11. Audit trail and certificate of completion

- 11.1 Audit trail
- 11.2 Certificate of completion

11.3 Verifying a signed document

12. Mobile app

12.1 Features

13. Best practices

13.1 Nuagix recommendations

PART 2 — ADMINISTRATOR GUIDE

14. Users, roles and profiles

14.1 Key concepts

14.2 Adding a user

14.3 When an employee leaves

15. Organization settings

15.1 Profile and branding

15.2 Document settings

16. Customization

16.1 Customization options

16.2 Managing organization templates

17. Automation and API

17.1 Automation tools

17.2 Setting up API access

18. Integrations

18.1 Zoho integrations

18.2 Other integrations

19. Security and compliance

19.1 Security controls

19.2 Privacy and Quebec Law 25

20. Legal validity in Canada and Quebec

20.1 Legal framework

20.2 How Zoho Sign supports evidence

20.3 Exceptions and caution

21. Editions and licenses

21.1 Editions

21.2 Tracking usage

22. Deployment checklist

22.1 Before going live

APPENDIX

A. English-French glossary

A.1 Interface terms

Part 1 — User Guide

1. Introduction and access
2. Interface and navigation
3. Sending a document for signature
4. Recipients and signing order
5. Fields and document preparation
6. Signing a document
7. Templates
8. SignForms (self-service forms)
9. Tracking, reminders and reports
10. Signer identity verification
11. Audit trail and certificate of completion
12. Mobile app
13. Best practices

[↑ Back to index](#)

1. Introduction and access

1.1 About this manual

This manual describes the Zoho Sign features available to users and the functions reserved for administrators, as available in September 2026.

Available features vary by edition (Free, Standard, Professional, Enterprise or Zoho One) and by your organization's configuration.

1.2 What is Zoho Sign?

Zoho Sign is Zoho's electronic signature solution. It lets you send documents (contracts, quotes, hiring forms, non-disclosure agreements) for signature, sign a document yourself, track progress in real time and keep a complete audit trail for every transaction. Signers do not need a Zoho account: they sign from a link received by email, on a computer, tablet or phone.

1.3 Signing in

1. Go to <https://sign.zoho.com> (or <https://sign.zohocloud.ca> if your organization is hosted in the Canadian data center).
2. Sign in with your Zoho account or your organization's single sign-on.
3. If you use Zoho One, open the app launcher and select Sign.
4. Complete multi-factor authentication with Zoho OneAuth if required.

Nuagix tip — Install the Zoho Sign mobile app to sign or approve documents on the go, and the Zoho Sign add-in for Microsoft 365 or Google Workspace if your organization uses it.

[↑ Back to index](#)

2. Interface and navigation

2.1 Interface elements

Element	Purpose
Home	Dashboard: documents to sign, pending, completed and expiring soon
Documents	All sent, received and draft documents, with status filters
Templates	Reusable documents with preconfigured recipients and fields
SignForms	Self-service forms published by link or embedded in a website
Reports	Sending, signing and user activity statistics
Settings	Personal preferences and, for administrators, organization settings
Send for signatures button	Start a new request

2.2 Document statuses

Status	Meaning
Draft	Document prepared but not yet sent
In progress	Sent, waiting for one or more signatures
Completed	All parties have signed; certificate of completion generated
Declined	A recipient declined to sign, with a reason
Recalled	The sender cancelled the request
Expired	The signing deadline has passed

[↑ Back to index](#)

3. Sending a document for signature

3.1 Preparing the request

1. Click Send for signatures.
2. Add the document from your computer, Zoho WorkDrive, Google Drive, OneDrive, Dropbox or Box (PDF, DOCX, images and other formats).
3. Add recipients: name, email address and action type (sign, approve, receive a copy, etc.).
4. If needed, enable signing order and identity verification.
5. Write the accompanying message and choose the language of the emails sent to the recipient.
6. Click Continue to place fields, then Send.

Nuagix tip — Name your documents consistently (e.g., “Service Agreement — Client — 2026-09”): searching and filing will be much easier.

3.2 Sending options

- Document expiry date and automatic reminders
- Private message to a specific recipient
- Signing language adapted to each recipient (French, English and others)
- Bulk send: one document to many recipients who each sign their own copy, from a CSV file, depending on edition
- Sending from an integrated app (Zoho CRM, Zoho Books, Microsoft Word or Outlook)

[↑ Back to index](#)

4. Recipients and signing order

4.1 Recipient types

Action	Recipient's role
Needs to sign	Fills in their fields and signs the document
In-person signer	Signs on site, on the device of a host from your organization
Approver	Approves or rejects the document without signing it
Receives a copy	Receives the final document, no action required
Manager	Designates the appropriate signer within their own organization

Note — Available action types may vary by edition.

4.2 Setting the signing order

1. On the recipients screen, check Send in order.
2. Drag recipients to set the sequence (e.g., client, then director, then a copy to accounting).
3. Give several recipients the same order number so they sign in parallel.
4. Each recipient receives the email only when the previous step is complete.

Nuagix tip — Put your internal signers last: the client signs first, then your authorized signatory confirms the agreement.

4.3 In-person signing

1. Add an In-person signer recipient and designate the host (a user in your organization).
2. The host opens the document on their computer, tablet or the mobile app.
3. They hand the device to the signer, who reviews and signs the document.
4. The audit trail records the host, the signer and the device used.

[↑ Back to index](#)

5. Fields and document preparation

5.1 Available fields

Field	Use
Signature and initials	Full signature or initials on each page
Name, email, company, title	Filled in automatically from the signer's profile
Sign date	Added automatically at the time of signing
Text, number, date	Information entered by the signer
Checkbox, radio button, dropdown	Choices and consents
Attachment	The signer uploads a file (e.g., void cheque, supporting document)
Stamp	Company seal or stamp, depending on edition

5.2 Placing fields

1. Choose the recipient in the list on the left: their fields take their colour.
2. Drag fields onto the document where needed.
3. Set for each field: mandatory or optional, default value, validation (e.g., email, number).
4. Use conditional fields to show a field based on an answer, depending on edition.
5. Preview the document from each recipient's point of view before sending.

5.3 Text tags

If your documents are generated by another system (Word, Zoho Writer, business software), insert text tags in the source document. On upload, Zoho Sign converts them into fields automatically, with no manual placement.

Nuagix tip — Text tags are ideal for high-volume contracts: they prevent placement errors.

[↑ Back to index](#)

6. Signing a document

6.1 Signing a document you received

1. Open the Zoho Sign email and click Start signing.
2. Verify your identity if a code is requested.
3. Read the document; fields to complete are highlighted and the Next button guides you.
4. Choose your signature: drawn, typed or uploaded (image).
5. Click Finish. You will receive the signed copy by email once all signatures are collected.

6.2 Sign yourself

1. Click Sign yourself.
2. Upload the document.
3. Add your signature and any other useful fields.
4. Save: the signed document and its certificate are kept in your documents.

6.3 Other recipient actions

- Decline, with a reason
- Reassign to another person, if the sender allows it
- Add a comment to ask for clarification
- Download a copy of the document before signing

[↑ Back to index](#)

7. Templates

7.1 Creating a template

1. Templates > New template.
2. Upload the base document (e.g., service agreement, hiring form).
3. Define recipient roles rather than people (e.g., Client, Representative, Director).
4. Place fields for each role and prefill known values.
5. Save and share the template with your team or the whole organization.

7.2 Using a template

1. Open the template and click Send.
2. Map each role to a person (name and email).
3. Fill in the sender's fields, then send.

Nuagix tip — Create a template for every recurring document (contract, purchase order, consent form) and lock it: your teams will always use the current version.

[↑ Back to index](#)

8. SignForms (self-service forms)

8.1 Principle

A SignForm is a document published as a link or embedded in your website. Anyone who opens it enters their information, verifies their email address and signs the document, without you having to send it individually. Examples: waiver, registration form, volunteer agreement, consent to the collection of personal information.

8.2 Creating a SignForm

1. From a template, choose Create SignForm (or go to the SignForms tab).
2. Set the form's validity period and the maximum number of responses, if needed.
3. If necessary, add an internal countersigner who approves or signs after the respondent.
4. Publish: copy the link, the embed code (iframe) or the QR code.
5. Review responses in the SignForm's document list.

Caution — A SignForm is accessible to anyone who has the link: never prefill it with confidential information.

[↑ Back to index](#)

9. Tracking, reminders and reports

9.1 Tracking a document

- Documents: filter by status (in progress, completed, declined, expired)
- Open the document to see each recipient's status (sent, viewed, signed)
- Email and in-app notifications at each step
- Search by document name, recipient or date

9.2 Reminding, correcting or cancelling

1. Open the in-progress document.
2. Click Remind to nudge a recipient immediately.
3. To fix an email address, edit the pending recipient, if they have not signed yet.
4. To cancel the request, click Recall and enter the reason.
5. If needed, extend the expiry date.

9.3 Reports

- Number of documents sent, completed, declined and expired per period
- Average time to sign
- Activity per user or per template
- Export reports as CSV or PDF

[↑ Back to index](#)

10. Signer identity verification

10.1 Available methods

Method	How it works
Email	The link sent to the recipient's address is the basic verification
Offline access code	Code shared with the signer through another channel (text, chat) and entered before opening
Email OTP	One-time code sent to the signer's email address
SMS OTP	One-time code sent to the signer's mobile number
ID verification	Photo of an official ID document and a selfie, depending on edition and credits

10.2 Enabling verification for a recipient

1. On the recipients screen, click the verification icon next to the name.
2. Choose the method (offline code, email code, SMS code or ID document).
3. Enter the mobile number or the code, depending on the method.
4. Send: the signer must pass verification before opening the document.

Nuagix tip — For high-value agreements (contracts, loans, assignments), combine an SMS code with ID verification: proof of the signer's identity will be much stronger.

[↑ Back to index](#)

11. Audit trail and certificate of completion

11.1 Audit trail

- Time-stamped history of every event: creation, sending, viewing, verification, signing, declining
- IP address, device and, where permitted, approximate location of each action
- Digital fingerprint (hash) guaranteeing the document was not changed after signing
- Blockchain time-stamping, depending on edition

11.2 Certificate of completion

When all parties have signed, Zoho Sign seals the document with a digital signature and generates a certificate of completion summarizing the recipients, identity verifications and timeline. The certificate can be attached to the final document sent to all recipients.

11.3 Verifying a signed document

1. Open the completed document and download the signed document with its certificate.
2. To validate a document received from a third party, use Zoho Sign's Verify document tool.
3. Keep the document and certificate together in your document management system (e.g., Zoho WorkDrive).

Nuagix tip — Set up automatic saving of completed documents to a WorkDrive folder per client: you will always find the final version and its proof.

[↑ Back to index](#)

12. Mobile app

12.1 Features

- Sign or approve documents you receive
- Send a document or template for signature
- Scan a paper document with the camera and send it for signature
- Host in-person signing on a tablet
- Track document status and receive notifications
- View completed documents and their certificates

[↑ Back to index](#)

13. Best practices

13.1 Nuagix recommendations

- Use templates for all recurring documents rather than starting from scratch
- Check recipient email addresses and order before every send
- Set a reasonable expiry date (e.g., 14 days) and enable automatic reminders
- Require an SMS code for important or sensitive documents
- Send documents in French to Quebec customers and choose each recipient's language
- File completed documents automatically in WorkDrive or on the customer's CRM record
- Never forward a modified signed document: send a new version for signature

[↑ Back to index](#)

Part 2 — Administrator Guide

- 14. Users, roles and profiles
- 15. Organization settings
- 16. Customization
- 17. Automation and API
- 18. Integrations
- 19. Security and compliance
- 20. Legal validity in Canada and Quebec
- 21. Editions and licenses
- 22. Deployment checklist

[↑ Back to index](#)

14. Users, roles and profiles

14.1 Key concepts

Element	Controls
Admin	Full access to organization settings, users and billing
User	Sends and signs documents, uses shared templates
Custom roles	Fine-grained permissions: create templates, bulk send, view others' documents, etc., depending on edition
Profiles	Set of settings applied to a group of users
User groups	Share templates and documents with a team

14.2 Adding a user

1. Settings > Users and control > Users > Add user.
2. Enter the name and email address.
3. Assign the role and, if needed, the profile and groups.
4. The user receives an invitation; they use a license once active.

Note — In Zoho One, first add the user in the Zoho One console and assign them the Sign app.

14.3 When an employee leaves

1. Transfer their in-progress documents and templates to another user.
2. Check the SignForms they own or countersign and reassign them.
3. Update integrations (CRM, Books, API) configured under their name.
4. Deactivate the user to free the license.

Caution — Deleting a user without transferring their documents can interrupt signatures in progress and make SignForms inaccessible.

[↑ Back to index](#)

15. Organization settings

15.1 Profile and branding

1. Settings > Organization > Profile: legal name, address, time zone, default language.
2. Branding: logo, colours and sender name shown to recipients.
3. Custom domain or sender address, depending on edition.
4. Email footer and company contact details.

15.2 Document settings

- Default expiry period and automatic reminder frequency
- Allowed signature types (drawn, typed, uploaded)
- Allow or block declining, reassigning and comments
- Attach the certificate of completion to the final document
- Automatic deletion or retention of documents according to a retention policy
- Automatic backup location for completed documents (WorkDrive, Google Drive, OneDrive, Dropbox, Box)

Nuagix tip — Set cautious defaults (14-day expiry, reminders every 3 days, certificate attached): your users will not have to think about it.

[↑ Back to index](#)

16. Customization

16.1 Customization options

- Email templates: sending, reminder and completion messages in French and English
- Branded signing page
- Reusable custom fields
- Predefined decline reasons
- Document types to classify and filter requests (e.g., Contract, Human Resources, Purchasing)
- Organization-wide templates locked against editing

16.2 Managing organization templates

1. Designate a template owner (custom role with create permission).
2. Create the official templates and share them with the relevant groups.
3. Remove edit access from other users.
4. Review templates at least once a year or whenever the law changes.

Caution — Before changing a template used by an integration (CRM, SignForm, API), make sure role and field names stay the same.

[↑ Back to index](#)

17. Automation and API

17.1 Automation tools

Tool	Use
Bulk send	Send a template to dozens of recipients from a CSV file
SignForms	Self-service signature collection by link, website or QR code
Zoho CRM workflows	Automatically send a contract when a deal reaches a given stage
Zoho Flow	Connect Zoho Sign to other apps without code
REST API and webhooks	Build signing into your apps and receive events (signed, declined, completed)
Embedded signing	Have documents signed inside your own website or portal

17.2 Setting up API access

1. Create an OAuth client in the Zoho developer console (api-console.zoho.com, or the matching Canadian domain).
2. Grant only the Zoho Sign scopes you need.
3. Configure webhooks in Settings > API and webhooks to receive status changes.
4. Test in a test account or environment before going live.

Nuagix tip — Record every integration (purpose, app, owner, scopes) in a shared register: it is essential when an employee leaves or during an audit.

[↑ Back to index](#)

18. Integrations

18.1 Zoho integrations

Application	Typical use
Zoho CRM	Send quotes and contracts from a deal; status and signed document saved on the record
Zoho Books / Invoice	Have customers sign quotes and purchase orders
Zoho Forms	Turn a form submission into a document to sign
Zoho WorkDrive	Upload documents and automatically save signed documents
Zoho Recruit / People	Job offers and employee onboarding documents
Zoho Writer	Mail merge and send for signature
Zoho Desk / Projects	Approvals and agreements linked to tickets or projects

18.2 Other integrations

- Microsoft 365: Word, Outlook, Teams, SharePoint and OneDrive
- Google Workspace: Gmail, Google Drive, Google Docs
- Dropbox and Box
- Zapier and Zoho Flow for other apps
- REST API (OAuth 2.0), webhooks and SDKs

[↑ Back to index](#)

19. Security and compliance

19.1 Security controls

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory
- Encryption of documents in transit and at rest (AES-256)
- Role-based restrictions (download, delete, access to others' documents)
- Organization activity log (user and administrator actions)
- Digital sealing of documents and tamper-evident audit trail
- Hosting in the Canadian data center (zohocloud.ca)

19.2 Privacy and Quebec Law 25

- Collect only the personal information you need in your documents
- Inform signers how their information is used (e.g., privacy clause in the document or SignForm)
- Restrict access to documents containing sensitive information (HR, health, finance)
- Set a retention period and delete documents that are no longer required
- Document any transfer of information outside Quebec if hosting is not in Canada

Note — This manual is not legal advice. Confirm your obligations with your legal advisor.

[↑ Back to index](#)

20. Legal validity in Canada and Quebec

20.1 Legal framework

Legislation	Scope
Act to establish a legal framework for information technology (Quebec, CQLR c. C-1.1)	Recognizes the legal value of technology-based documents and electronic signatures, provided the document's integrity and the link between the signature and the person are ensured
Civil Code of Québec	Defines a signature as the personal mark a person affixes to show consent, regardless of the medium
PIPEDA, Part 2 (federal)	Governs electronic documents and signatures under federal statutes
Other provinces' electronic commerce acts	Similar recognition of electronic signatures elsewhere in Canada

20.2 How Zoho Sign supports evidence

- Integrity: digital sealing and the document hash reveal any change
- Link to the person: verification by email, SMS code or ID document
- Consent: deliberate act of signing and an acceptance checkbox, if needed
- Traceability: time-stamped audit trail and certificate of completion
- Retention: final copy sent to all parties and archived

20.3 Exceptions and caution

- Some acts require a specific form (e.g., notarial deeds, certain wills, real estate documents published in the land register)
- Specific requirements may apply in regulated sectors (securities, insurance, health)
- For high-stakes documents, use the strongest identity verification available

Note — This manual is not legal advice. Confirm with your legal advisor whether an electronic signature suits the document in question and what level of identity verification is appropriate.

[↑ Back to index](#)

21. Editions and licenses

21.1 Editions

Edition	For whom
Free	Limited individual use: sign yourself and a few requests
Standard	Small teams: signature requests, reminders, audit trail
Professional	Growing teams: templates, advanced fields, integrations, branding
Enterprise	Organizations: bulk send, in-person signing, SignForms, custom roles, advanced verification options, higher limits
Zoho One / Zoho Workplace	Zoho Sign included with other suite apps, depending on the offer

Note — The exact feature split changes regularly: confirm your edition on the Zoho Sign pricing page.

21.2 Tracking usage

Settings > Subscription shows the edition, licenses used, number of requests and credits (SMS, ID verification, API). Remove licenses from deactivated users.

[↑ Back to index](#)

22. Deployment checklist

22.1 Before going live

- ☐ Organization profile, time zone and default language configured
- ☐ Branding (logo, colours, sender name) applied
- ☐ Users added, roles and groups defined
- ☐ Default expiry, reminders and signature types configured
- ☐ Official templates created, reviewed and locked
- ☐ SignForms published and tested, if applicable
- ☐ Identity verification methods defined by document type
- ☐ Automatic backup of completed documents to WorkDrive configured
- ☐ Integrations (CRM, Books, Forms, Microsoft 365) configured and tested
- ☐ Retention policy and Law 25 measures documented
- ☐ Legal validation of the documents concerned obtained
- ☐ Users trained and documentation delivered

Nuagix tip — Nuagix can support your team with Zoho Sign setup, integration and training.
Book a Zoom meeting: <https://nuagix.zohobookings.com/#!/andre-martin>

[↑ Back to index](#)

Appendix

A. English-French glossary

[↑ Back to index](#)

A. English-French glossary

A.1 Interface terms

English (interface)	French
Send for signatures	Envoyer pour signature
Sign yourself	Signer vous-même
Recipient	Destinataire
Signer	Signataire
Approver	Approbateur
Receives a copy	Reçoit une copie
In-person signer	Signataire en personne
Signing order	Ordre de signature
Template	Modèle
Bulk send	Envoi en masse
Field	Champ
Text tag	Balise de texte
Reminder	Rappel
Recall	Rappel du document
Decline	Refuser
Reassign	Réassigner
Audit trail	Piste d'audit
Certificate of completion	Certificat de complétion
Offline access code	Code d'accès hors ligne
ID verification	Vérification de pièce d'identité

[↑ Back to index](#)