



# ZOHO SIGN AGENDA



# Summary

**Duration: 1 days | 4 hours (Inclusive of breaks)**

## About the training:

This training offers personalized and comprehensive coverage of Zoho Sign's basic and advanced features. It is designed to help you, the admin, gain a clearer picture of Zoho Sign's functionalities and learn how a digital signature application can help your business.

## Who it is for?

This course is designed for admins who are responsible for setting up and managing the Zoho Sign account.

## Training Delivery and Format:

The training sessions will be delivered exclusively in English, using general examples and use cases from industries such as fitness, automotive, and education. These sessions are intended to offer a broad overview with industrial examples, they're not tailored to specific business requirements. Trainers will not be able to assist in customizing your Zoho Sign for individual business needs. The session will run for 4 hours a day.



# Overview:

Zoho Sign: An introduction to the application, its role in the Zoho suite of applications, and how Zoho Sign helps business signatories digitally manage their paperwork.



## Module 1

### User management

- Signing up with Zoho Sign
- Configuring multi-factor authentication
- Integrating with Google Workspace and Office 365
- Importing contacts
- Adding new users
- Creating user groups
- Creating and assigning custom roles and permission profiles



# Module 2

## Account setup and customization

- Setting up user profiles
- Adding your signature and stamp
- Entering your organization details
- Adding your company logo
- Customizing the email templates
- Verifying your email domain (DKIM)
- Customizing your legal disclosure message

# Module 3

## Document signing

- Signing documents yourself
- Sending document for signature
- Collecting in-person signatures

# Module 4

## Document management

- Creating folders



- Tracking document status

## Module 5

### Advanced Zoho Sign features

- Setting up reusable templates
- Creating self-service, form-based documents for signature via SignForms
- Sending and signing documents in bulk

## Module 6

### Account settings

- Modifying the sending options
- Customizing the recipient experience
- Adjusting notification settings
- Configuring cloud backup
- Enabling blockchain-based timestamping
- Enabling document timestamping

## Module 7

### Audits and reports

- Viewing detailed audit trails



- Generating, viewing, and exporting comprehensive reports

## Module 8

### Integrations

- Integrating Zoho Sign with Zoho apps (any 3)
- Integrating Zoho Sign with popular third-party applications (any 3)
- Others

## Module 9

### Digital signature and identity providers

- Reviewing digital signature and identity providers based on geography
  - Aadhaar eSign for India
  - Singpass for Singapore
  - Qualified electronic signatures for the European Union

