



Admin Training



About

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 is it for?

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

Agenda - Day one (four hours)

Module 1

User management

- Signing up with Zoho Sign
- Configuring multi-factor authentication
- Adding new users
- Integrating with Google Workspace and Office 365
- Assigning roles
- Importing contacts



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

Day two (four hours)

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

APIs and webhooks

- Discovering the basics of Zoho Sign's API and SDKs
- Learning about webhooks and how to use them

Module 9

Integrations

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

Module 10

Reviewing digital signature and identity providers based on geography

- Aadhaar eSign for India
- Singpass for Singapore
- Qualified electronic signatures for the European Union

