



Documents - Detailed View

This page presents detailed information on documents sent out for signatures.

The detailed view of any document can be accessed by clicking the document's name in the list view.

In the detailed view page, the following information can be found:

- Document owner's name
- Document description
- Submission date
- Last updated date
- Current recipient status

The screenshot shows the Zoho Sign interface for a document titled "Social media policy (1).docx". The document is owned by John Martin, has no description, and was submitted and last updated on Apr 10, 2024 at 18:51. A progress indicator shows 33% completion. The recipient status section shows one recipient, John Martin (john.martin@securesign24x7.com), who has been Mailed but not yet Viewed or Signed.

Recipient	Status
1 John Martin john.martin@securesign24x7.com	Mailed

Recipient Status

A colored flow graph depicts the status of document with respect to each recipient.

- **Grey** - The activity is not completed.
- **Green** - The activity has been completed.
- **Red** - The recipient has declined the document.

The screenshot displays the Zoho Sign web application interface. At the top, the browser address bar shows the URL: `sign.zoho.com/zs/669663555#/request/details/46850000002617977`. The page title is "Sign". The main content area shows document details for "NDA":

- Owned by John Martin
- No description given
- Submitted on Dec 13, 2023 12:15
- Last updated on Dec 13, 2023 12:15

A circular progress indicator on the right shows 33% completion. Below the document details, the "Recipient status" section shows a progress bar for John Martin (john.martin@securesign24x7.com). The progress bar is divided into three segments: "Mailed" (green, 33%), "Viewed" (grey), and "Signed" (grey).

Action buttons

Depending on the status of each document, the sender can perform a set of predefined actions:

- View the document activity history and it can be exported in CSV format
- Edit the document- applicable for draft and in-progress documents
- Extend the document expiry date- applicable only for in-progress documents
- Send reminder- applicable only for in-progress documents
- Recall the document- applicable only for in-progress documents
- Download the document
- Save the documents to cloud- not applicable for draft documents
- Edit as a new document- not applicable for completed documents
- Download the completion certificate- applicable only for completed documents
- Email document

- Correct document- applicable only for in-progress documents and the first recipient has not completed signing the document
- Edit- not applicable for draft documents
- Continue- applicable only for draft documents
- Save as template
- Change ownership
- Print the document
- Delete
- Upload signed document
- Stop schedule- applicable only for documents that has been scheduled
- Reschedule- applicable only for documents that has been scheduled
- Unblock access- applicable only when your recipient has failed to authenticate themselves
- Export audit

Editing actions

There are three ways to perform an editing action on a sent document with specified use cases for each:

- Edit
- Correct document
- Edit as new

 The document cannot be altered in any way after the signing process is complete.

Edit Document

Edit the settings and metadata of the documents sent for signatures by clicking **Edit** at the top of the detailed view screen.

Zoho Sign

sign.zoho.com/zs/669663555#/request/details/4685000002617977

Sign

Correct document Extend Send reminder Reminder settings

Edit

NDA
 Owned by John Martin
 No description given
 Submitted on Dec 13, 2023 12:15
 Last updated on Dec 13, 2023 12:15

View

Recipient status

John Martin
 john.martin@securesign24x7.com

Recall
 Upload signed document
 Email document
 Save to cloud
 Download
 Edit as new
 Save as template
 Change ownership
 Print
 Activity history

33%

Completed Viewed Signed

?

Zoho Sign

sign.zoho.com/zs/669663555#/request/new/4685000002838345

Sign

Edit document details

Social media policy (1)

Social media policy (1).docx

Recipients

Send in order

1	john.martin@securesign24x7.com	John Martin	Needs to sign	Email	Customize
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More settings

Days to complete: 5

Agreement valid until: Forever

Document type: Others

Continue Save & close

?

With the **Edit** action, you can:

- Change the name of the document
- Change the details of the recipient
- Uncheck the order of signing
- Further customize the signing action under the **Customize** and **More settings** buttons.

However, you cannot:

- Add more documents to the envelope
- Add recipients
- Change the order of recipients
- Change the role and delivery mode
- Configure the fields in the document viewer page.

Correct Document

Revisit and alter almost all the steps of the signing process by clicking Correct document at the top of the detailed view screen.

The screenshot shows the Zoho Sign web interface. The browser address bar displays the URL: `sign.zoho.com/zs/669663555#/request/details/46850000002617977`. The page title is "Sign". The navigation menu on the left includes: Sign, Documents, Templates, SignForms, Reports, and Settings. The main content area shows document details for "NDA":

- Owned by John Martin
- No description given
- Submitted on Dec 13, 2023 12:15
- Last updated on Dec 13, 2023 12:15

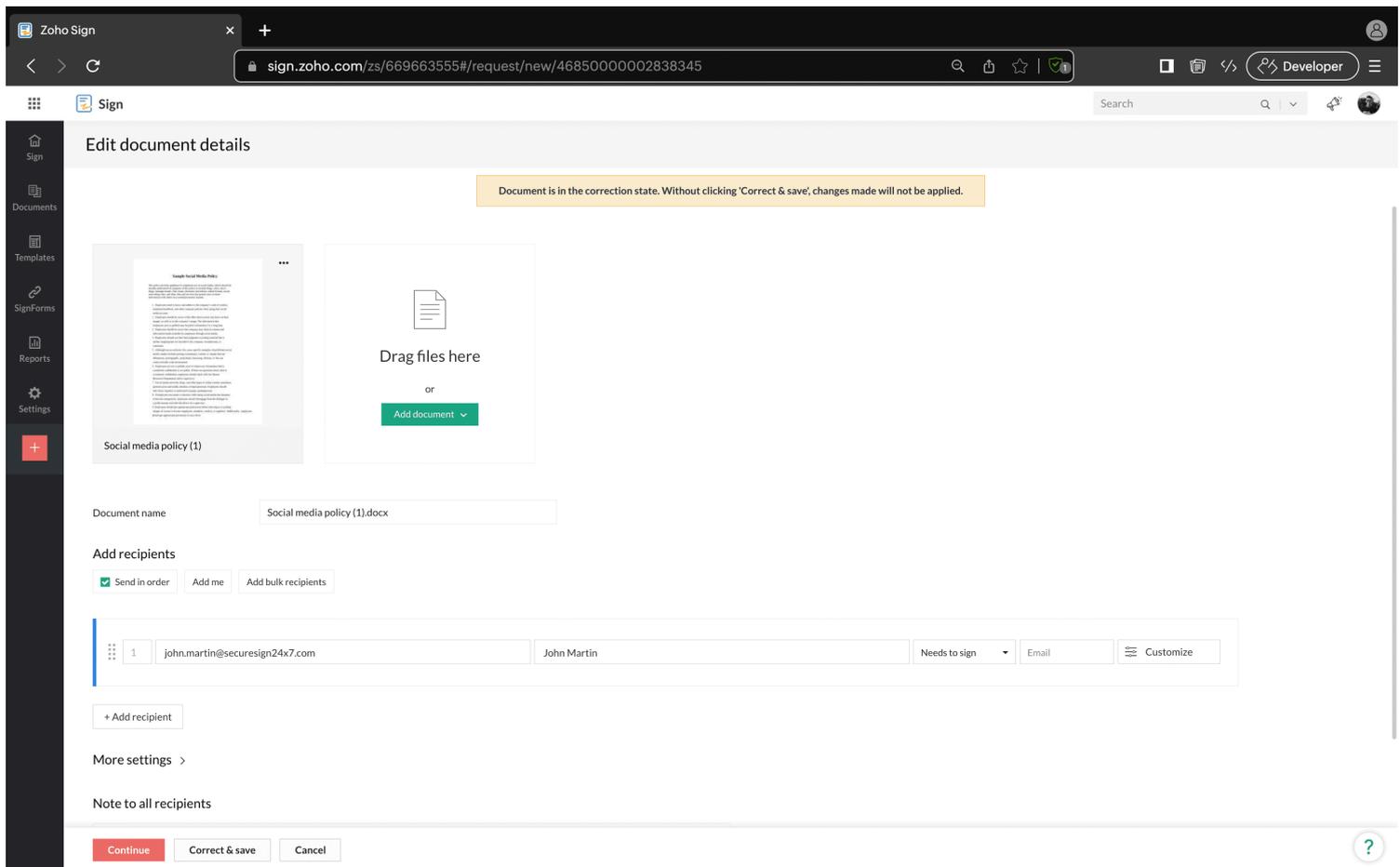
Below the document details is the "Recipient status" section, listing:

- John Martin
- john.martin@securesign24x7.com

A dropdown menu is open, showing the following options:

- Recall
- Upload signed document
- Email document
- Save to cloud
- Download
- Edit as new
- Save as template
- Change ownership
- Print
- Activity history

On the right side, there is a circular progress indicator showing 33% completion. Below it, a progress bar shows the status of the document: "Completed" (green), "Viewed" (white), and "Signed" (white).



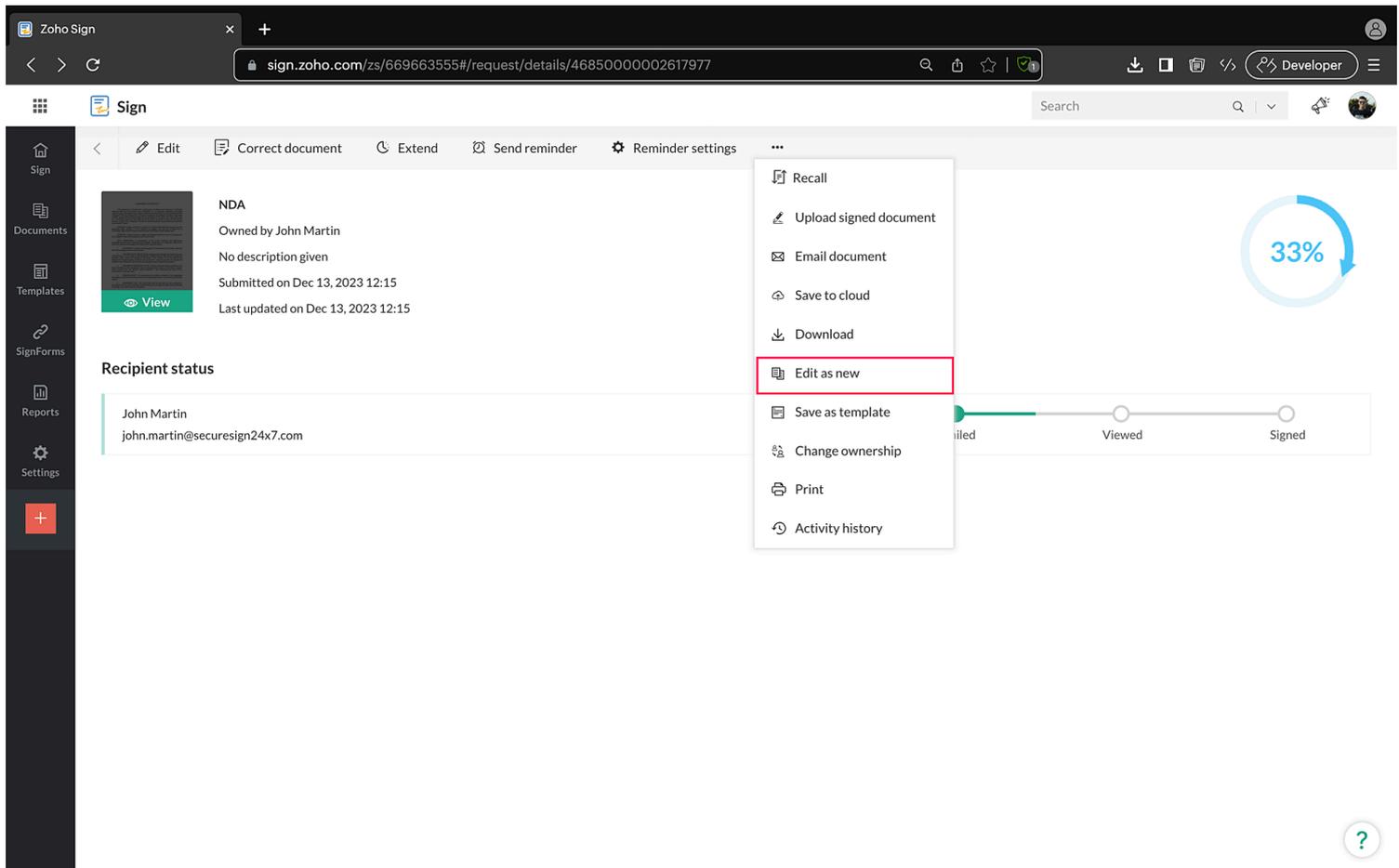
In addition to all the editing actions, with **Correct Document** you can:

- Add new documents to the envelope
- Add new recipients and alter their signing order
- Configure signing action
- Add and delete document fields

However, you cannot alter the document delivery mode.

Edit as new

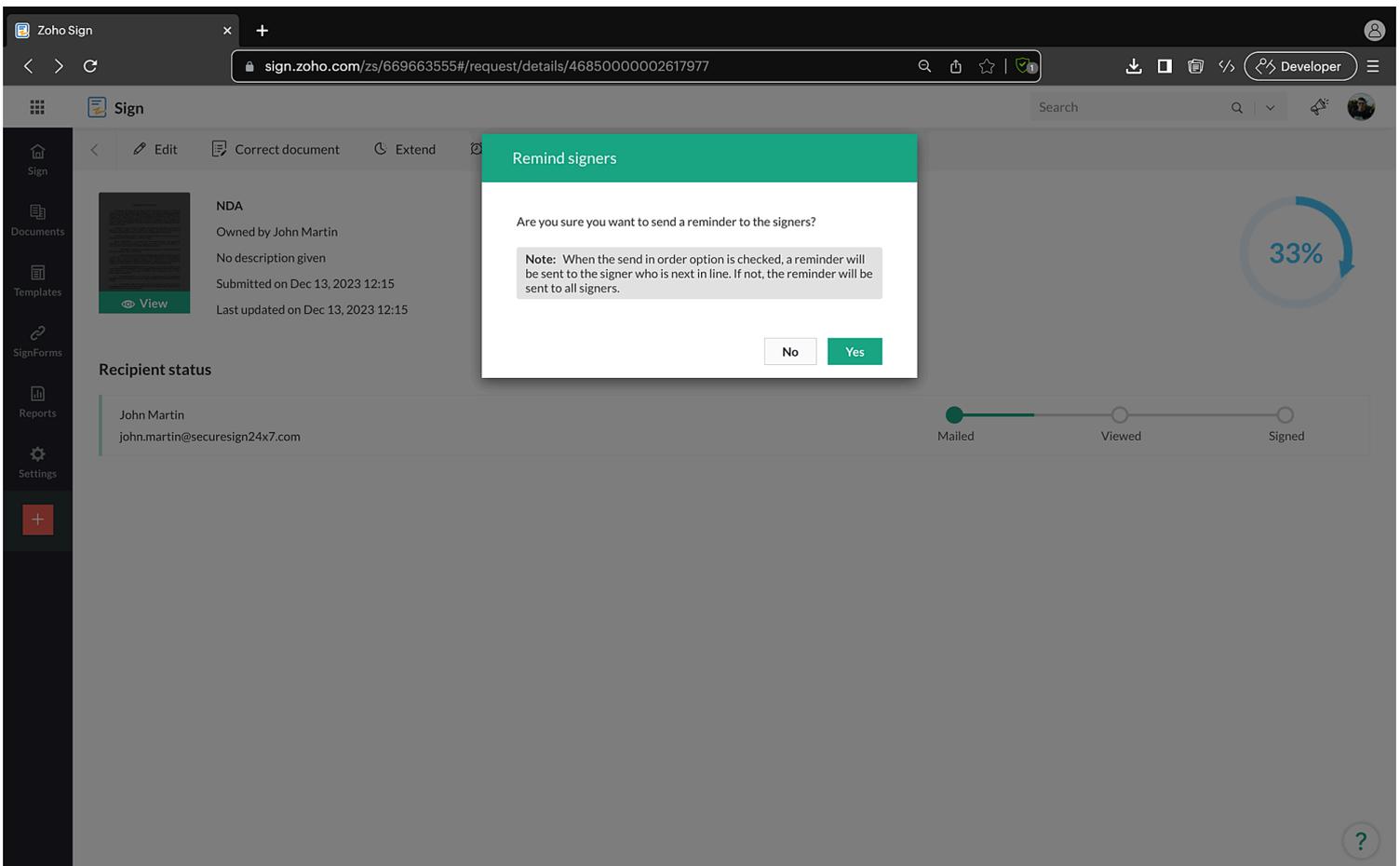
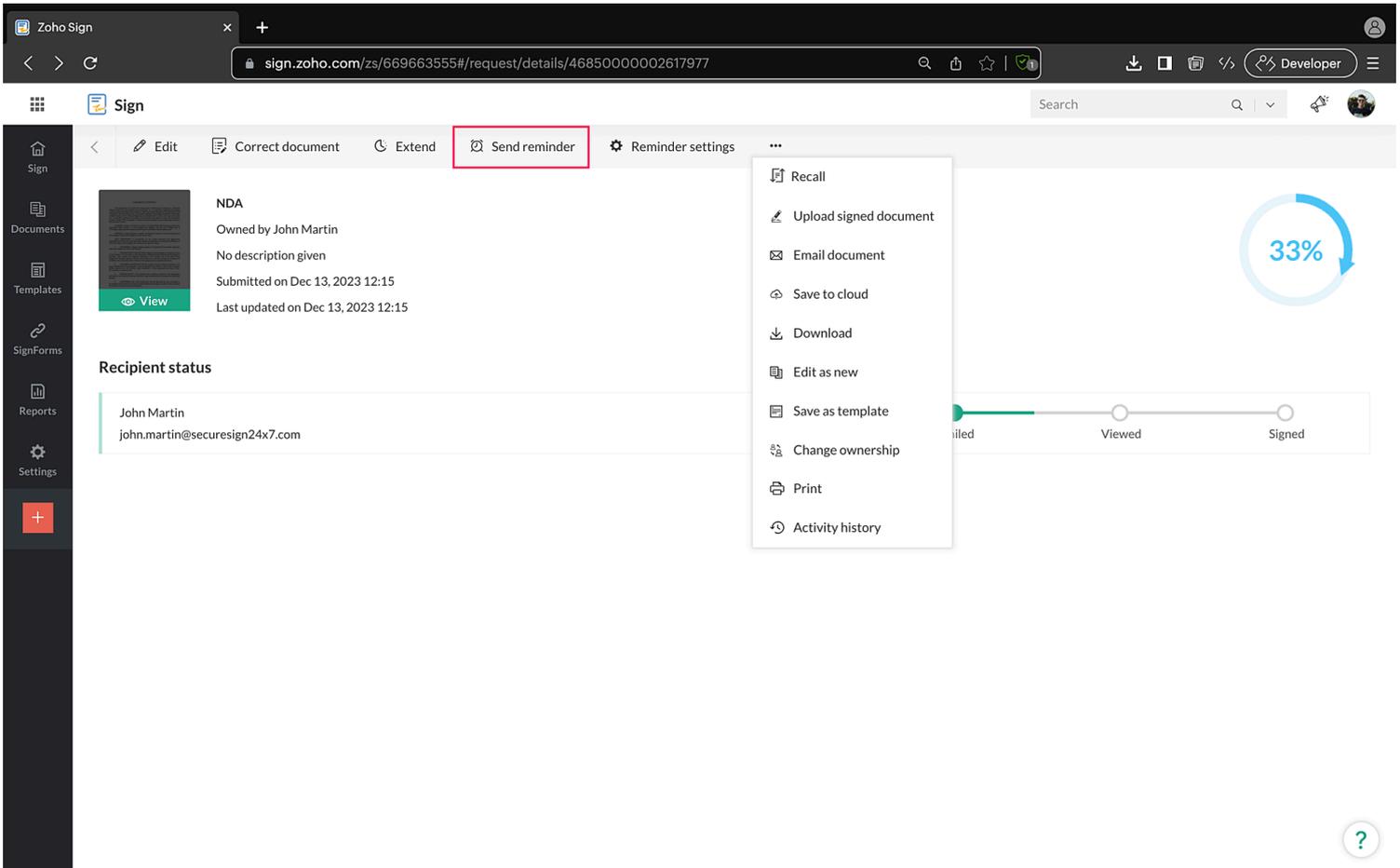
If you want to make a copy of the entire envelope or a part of it, including the signing workflow and the document fields, you can do so by clicking **Edit as new** at the top of the detailed view screen, or select from the action menu dropdown. The details and settings of the copy can be fully edited, but they are the same as the original by default.



Send reminder

You can send instant email reminders to the signatories to finish signing the documents.

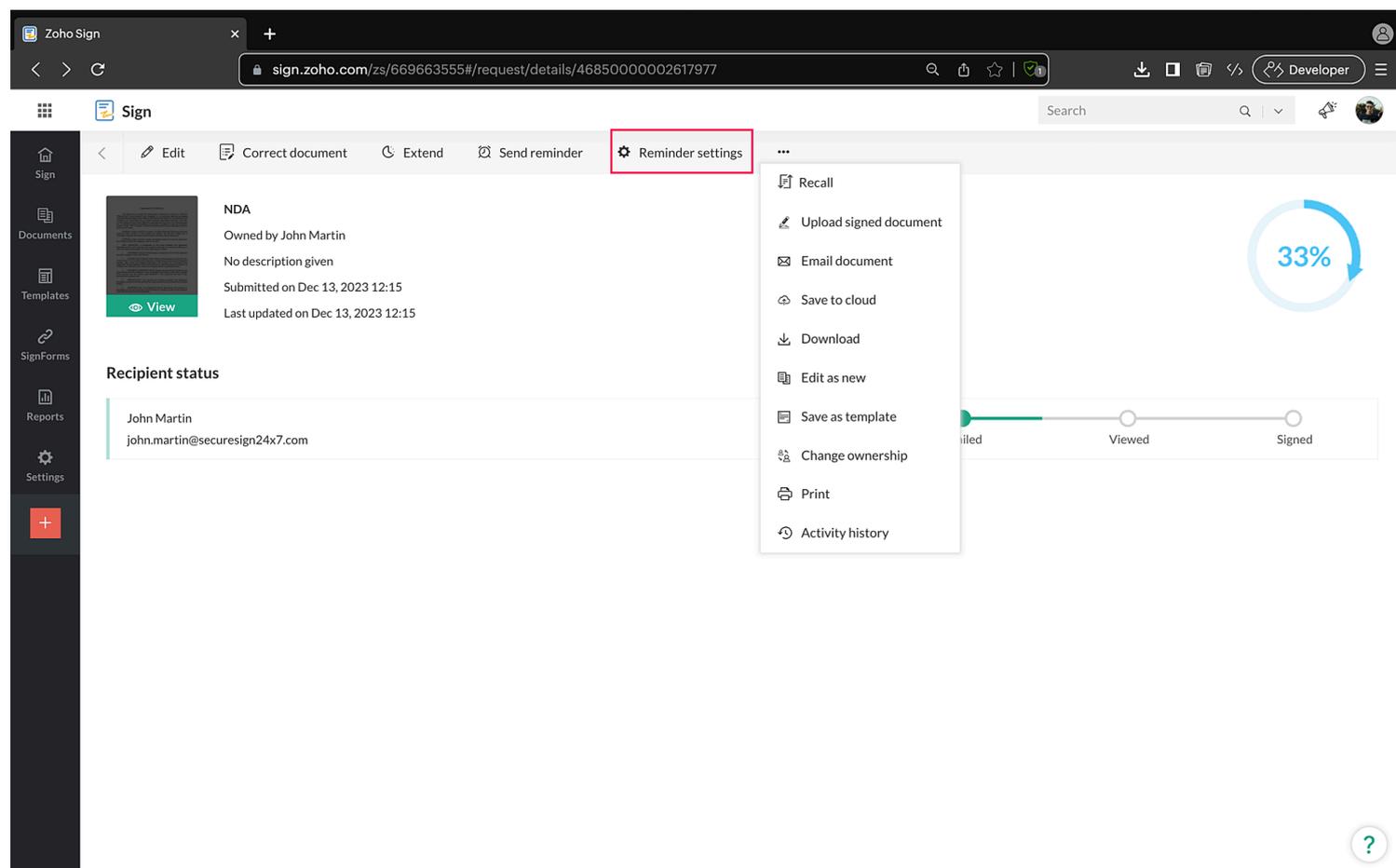
Click **Send Reminder** at the top of the detailed view screen, or select **Send Reminder** using the actions menu to open the reminder dialog box and click **Yes**.



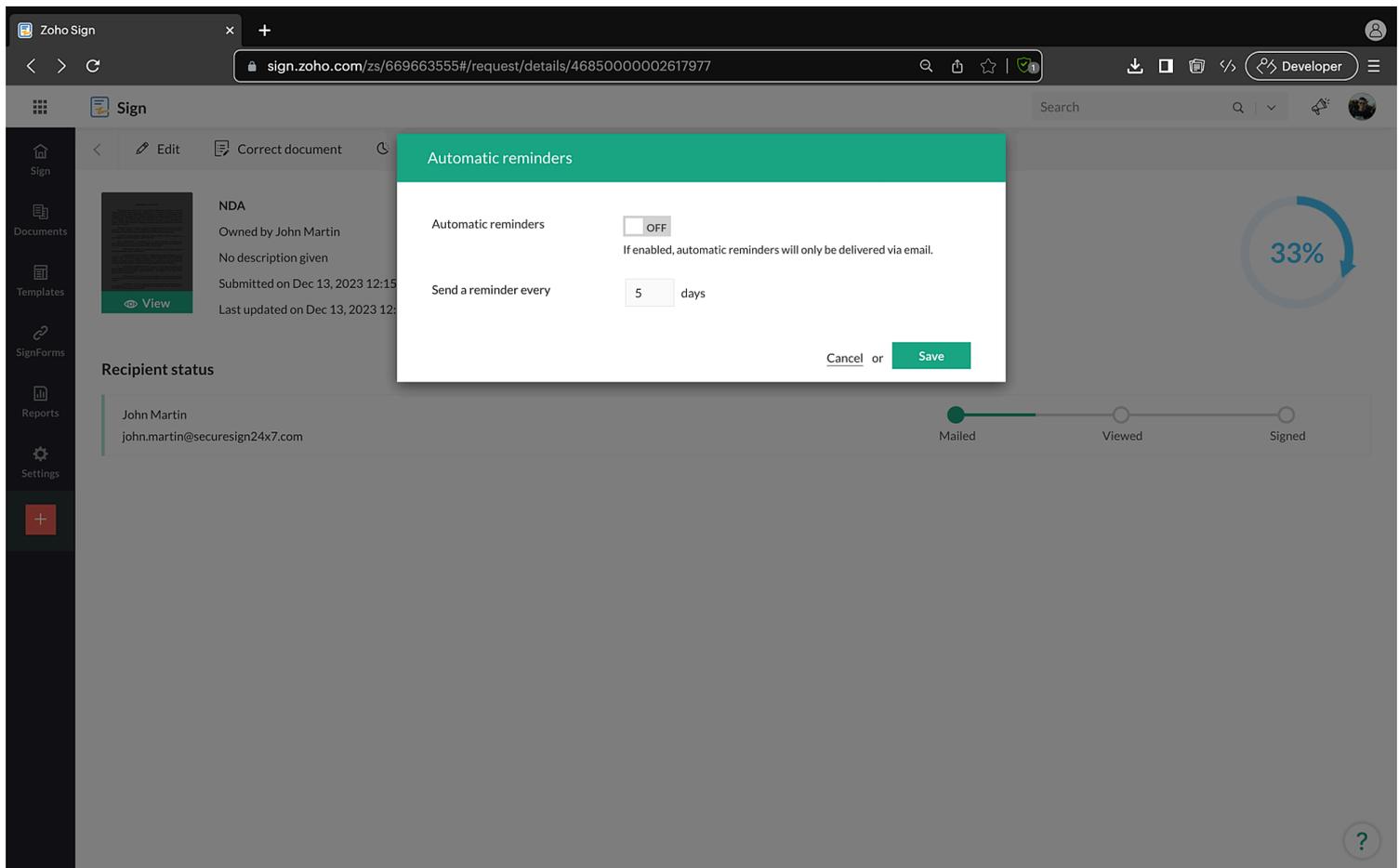
Reminder Settings

Set automatic email reminders for the signatories of the document.

- Click **Reminder Settings** at the top of the detailed view screen to open the automatic reminders dialog box, toggle automatic reminders to **ON**, specify the frequency of reminders, and click **Save**.
- The automated reminders will be sent to the signer only via email till the end of the specified date given to complete the signing process.



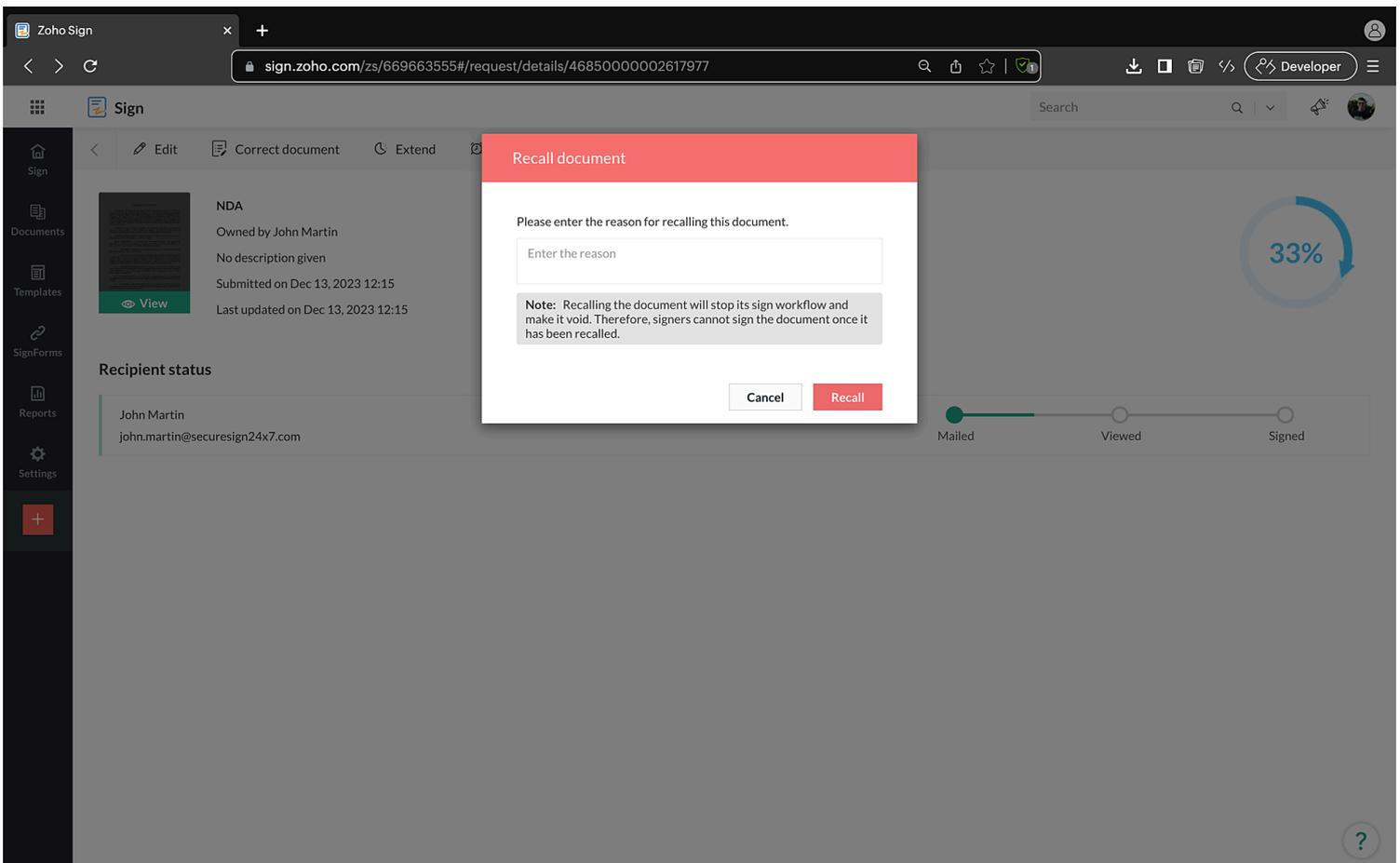
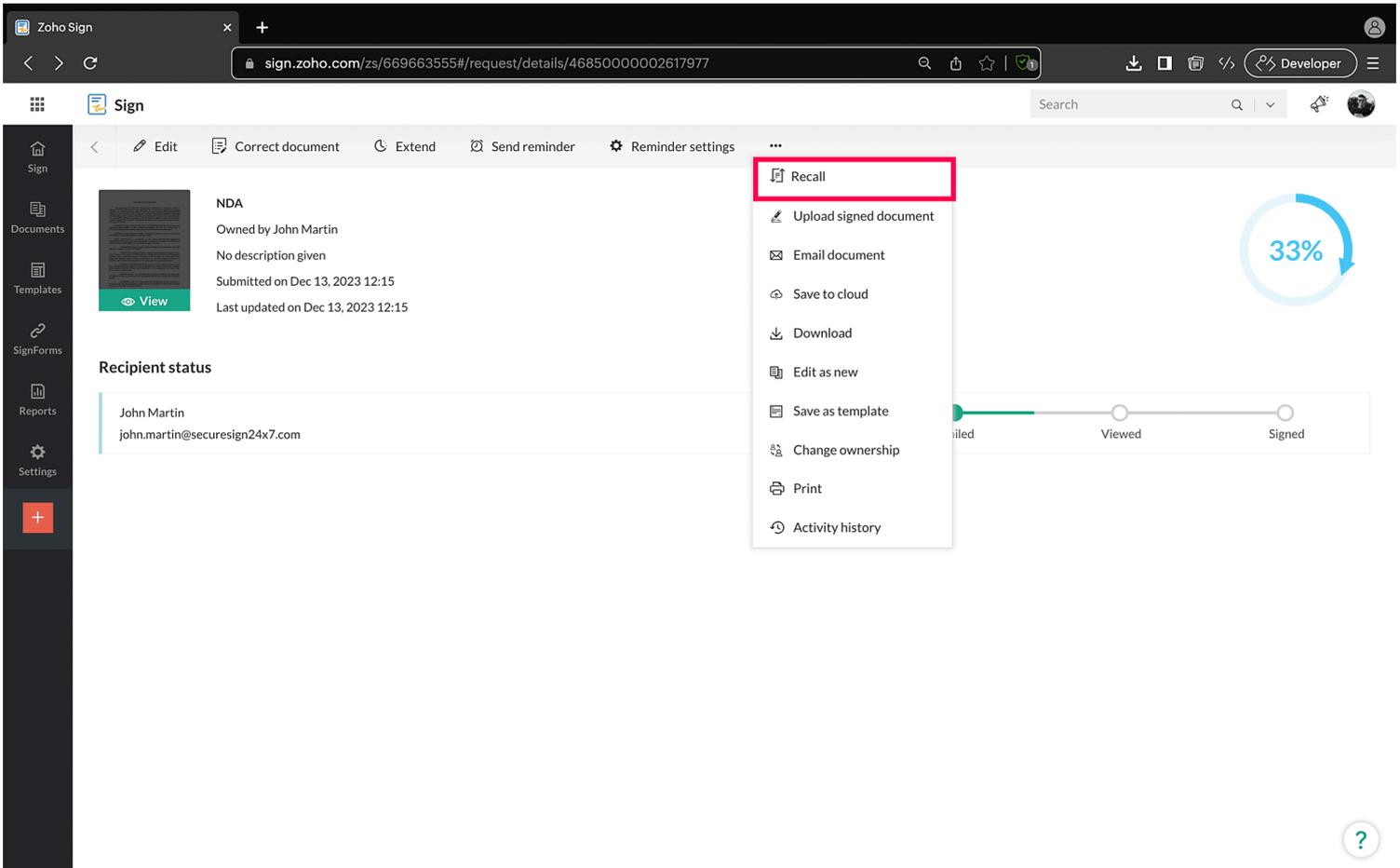
The screenshot displays the Zoho Sign web application interface. The browser address bar shows the URL: `sign.zoho.com/zs/669663555#/request/details/46850000002617977`. The main navigation bar includes options like 'Edit', 'Correct document', 'Extend', 'Send reminder', and 'Reminder settings' (highlighted with a red box). A dropdown menu is open from the 'Reminder settings' button, listing actions such as 'Recall', 'Upload signed document', 'Email document', 'Save to cloud', 'Download', 'Edit as new', 'Save as template', 'Change ownership', 'Print', and 'Activity history'. The document details section shows 'NDA' owned by John Martin, submitted on Dec 13, 2023 12:15. The recipient status for John Martin (john.martin@securesign24x7.com) is shown. A progress bar indicates 33% completion, with stages for 'Filed', 'Viewed', and 'Signed'.



📄 If a signing order is chosen, the reminders will be given to the signatories in order of signing. In other words, the second signer in the order will start to receive reminders only after the first signer completes their signing process.

Recall Document

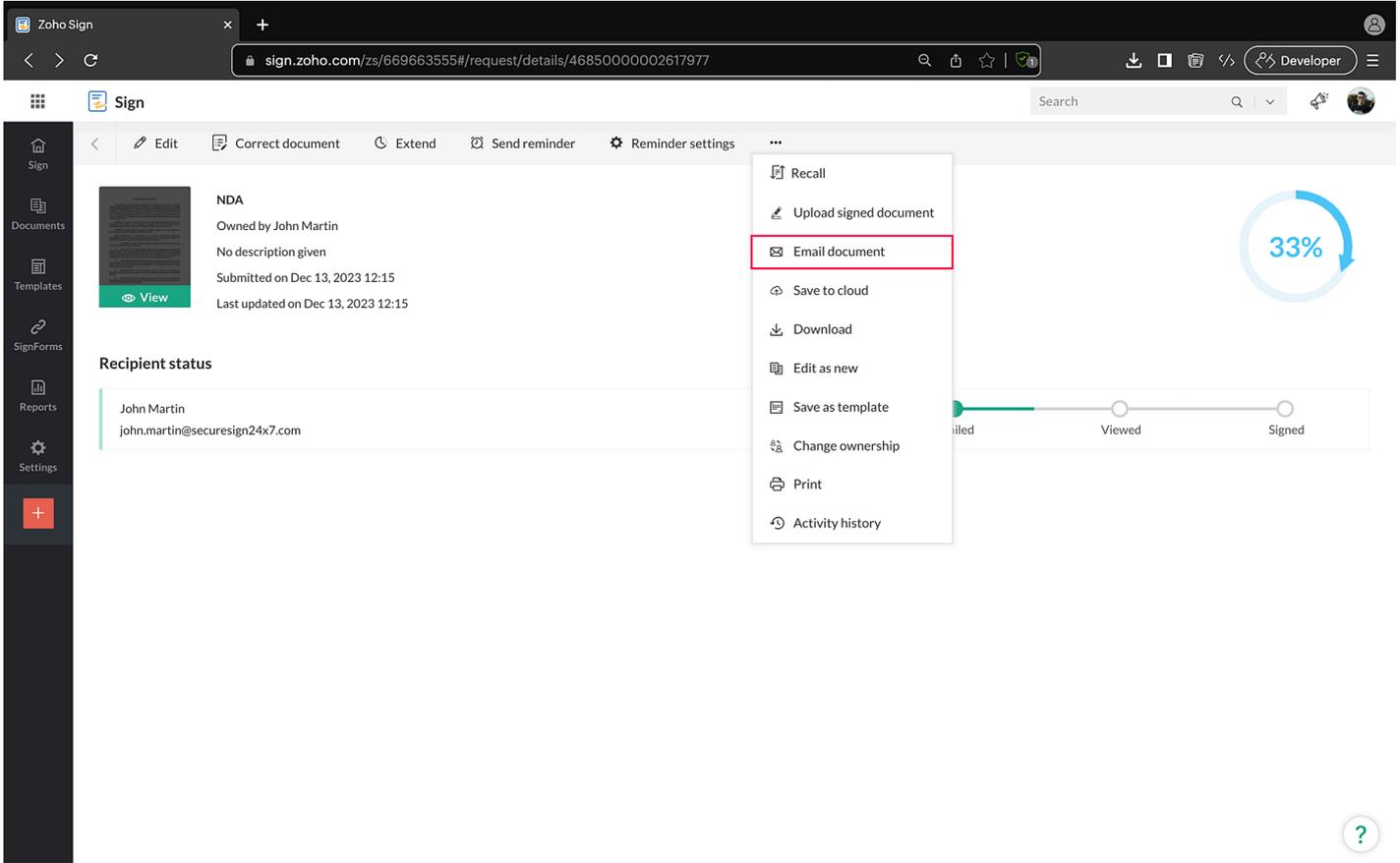
If you have sent the wrong document, you can always recall it by clicking **Recall** under the ellipsis of the detailed view screen. Proceed to enter the reason for recalling the document and click **Recall**.



 Please note that once you recall the document, the recipients can no longer view or sign it.

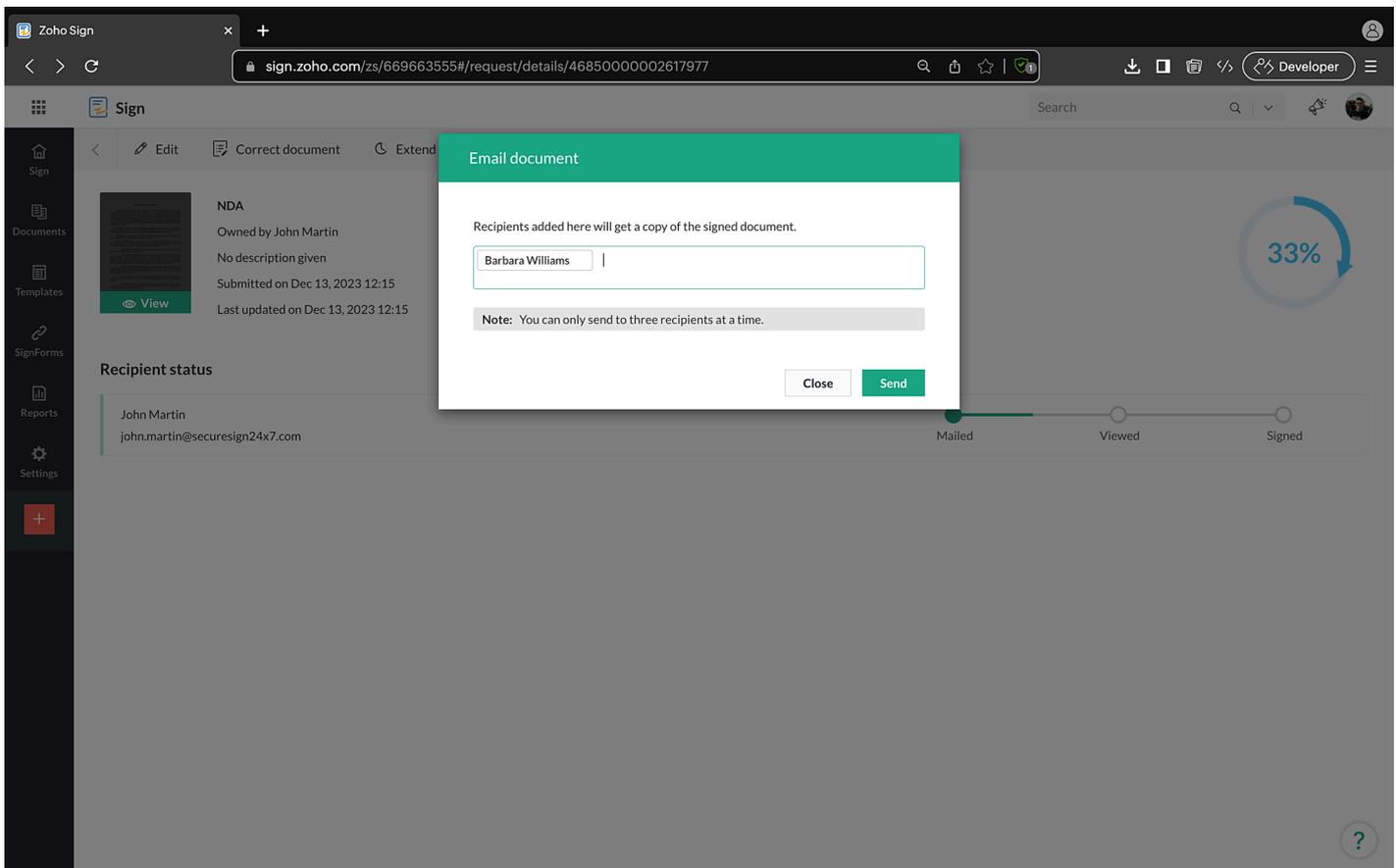
Email Document

- To open the actions menu, click the ellipsis icon at the top of the detailed view screen.



The screenshot displays the Zoho Sign web interface. The browser address bar shows the URL: `sign.zoho.com/zs/669663555#/request/details/46850000002617977`. The page title is "Sign". The main content area shows a document titled "NDA" owned by John Martin, submitted on Dec 13, 2023, 12:15. A "View" button is visible. Below the document details, the "Recipient status" section lists John Martin with the email `john.martin@securesign24x7.com`. An action dropdown menu is open, listing various options: Recall, Upload signed document, Email document (highlighted with a red box), Save to cloud, Download, Edit as new, Save as template, Change ownership, Print, and Activity history. A progress indicator on the right shows a 33% completion rate with a circular arrow icon. The bottom right corner features a help icon (question mark).

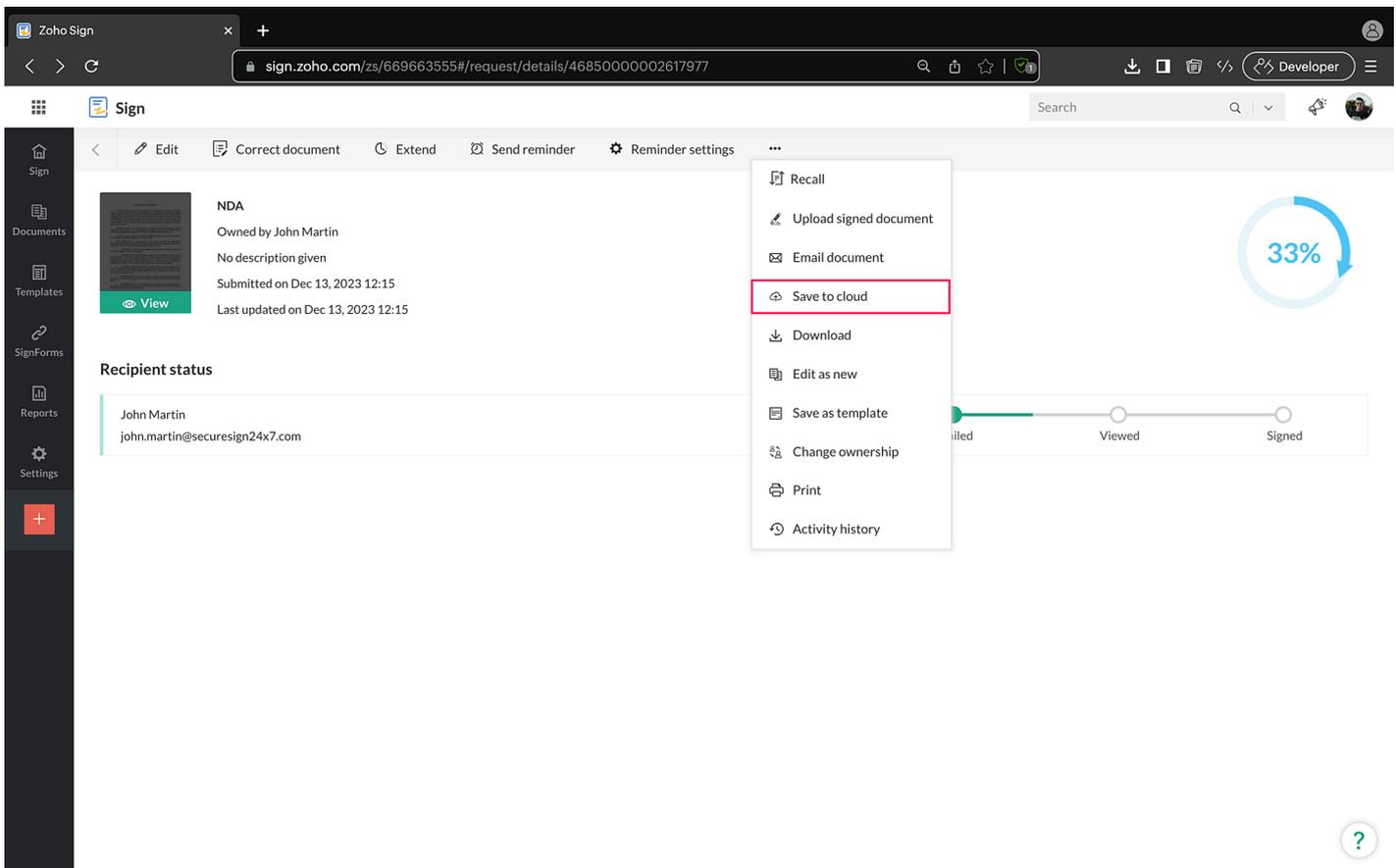
- Email a copy of the document in its current stage of progress to people you want.
- Click **Email document** at the top of the detailed view page or select from the action dropdown menu to open email dialog box.
- Enter the recipient email addresses and click **Send**.



Save to cloud

Using the cloud picker feature, save a copy of the document in its current stage of progress to your cloud storage.

- Click **Save to cloud** at the top of the detailed view screen or select from the action menu dropdown to open the cloud picker.



- Select the intended location on your storage explorer and click **Add to this folder**.

Cloud Uploader ✕


Zoho WorkDrive


Dropbox


Box


Google Drive


OneDrive

☰📁↕☰

NAME	LAST MODIFIED ↓
 Signed Documents Uploaded by John Martin	Jan 28, 2021 by John ...
 Sales Uploaded by John Martin	Nov 27, 2019 by John...
 HR Uploaded by John Martin	Nov 27, 2019 by John...

Create Folder

CancelAdd to this folder

Download Document

Download a copy of the document in its current stage of progress to the local drive on your device. Click **Download** at the top of the detailed view screen or select from the action menu dropdown.

 You can have your downloaded documents password protected which will be downloaded in zip format.

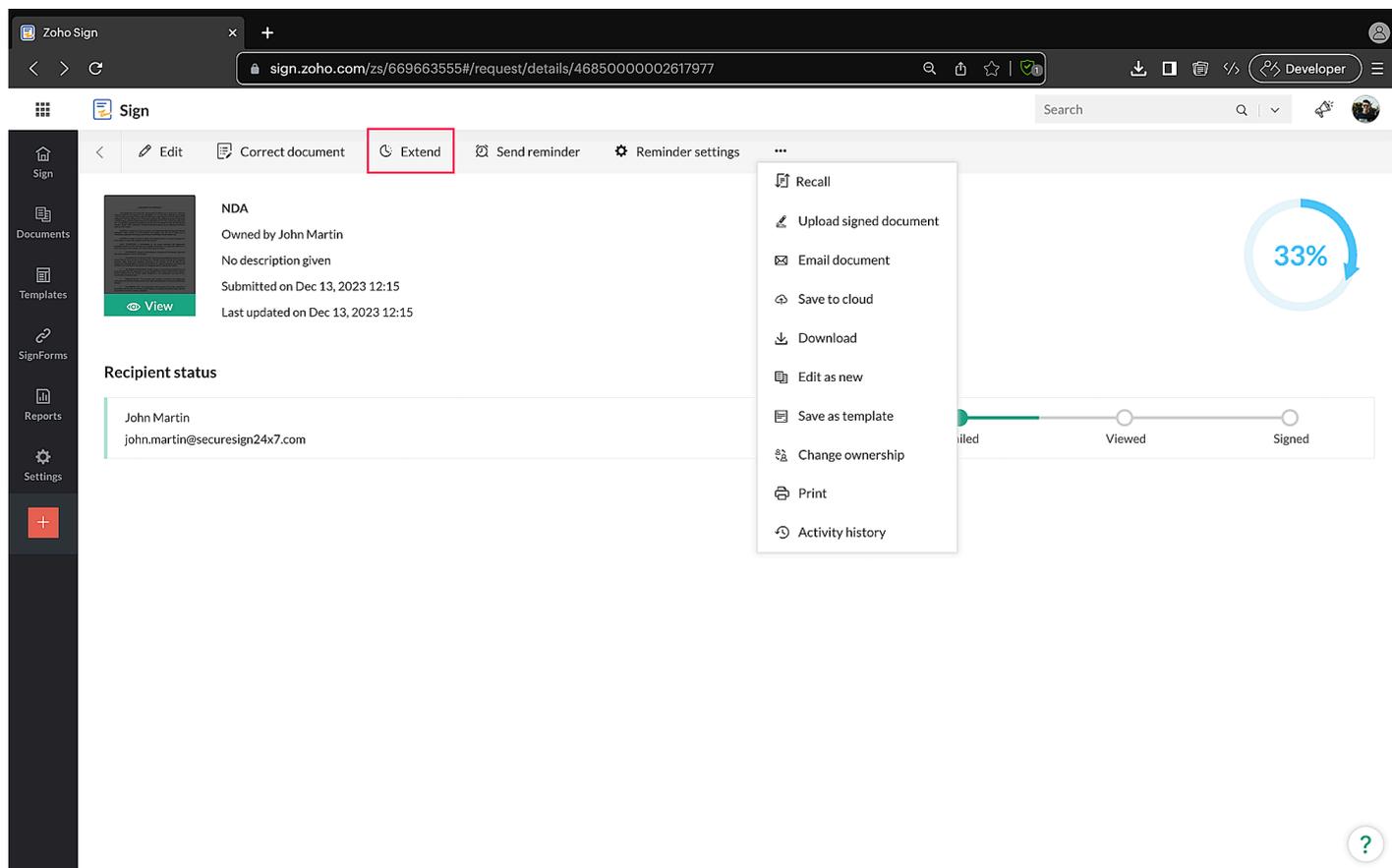
The screenshot shows the Zoho Sign web interface. The browser address bar displays `sign.zoho.com/zs/669663555#/request/details/46850000002617977`. The document title is "NDA". The document is owned by John Martin, with no description given. It was submitted on Dec 13, 2023, at 12:15 and last updated on the same date. The recipient status for John Martin (john.martin@securesign24x7.com) is shown as "Viewed". A progress bar on the right indicates 33% completion, with stages for "Viewed" and "Signed". A dropdown menu is open, listing actions: Recall, Upload signed document, Email document, Save to cloud, **Download** (highlighted with a red box), Edit as new, Save as template, Change ownership, Print, and Activity history.

The screenshot shows the Zoho Sign interface with a "Select download option" dialog box open. The document is titled "Sample social media policy" and is owned by Barbara Williams. It was submitted on Jan 29, 2025, and completed on the same date. The recipient status for John Zylker (john.zylker@zohomail.com) is shown as "Signed". The dialog box prompts the user to "Choose an option below to download the corresponding files." and lists four options: "Document(s) in a Zip file" (selected), "Certificate of completion", "Document(s) and Certificate of completion in a ZIP file", and "Document(s) and Certificate of completion merged in a single PDF file". A checkbox for "Protect with password" is highlighted with a red box. The "Download" button is visible at the bottom right of the dialog.

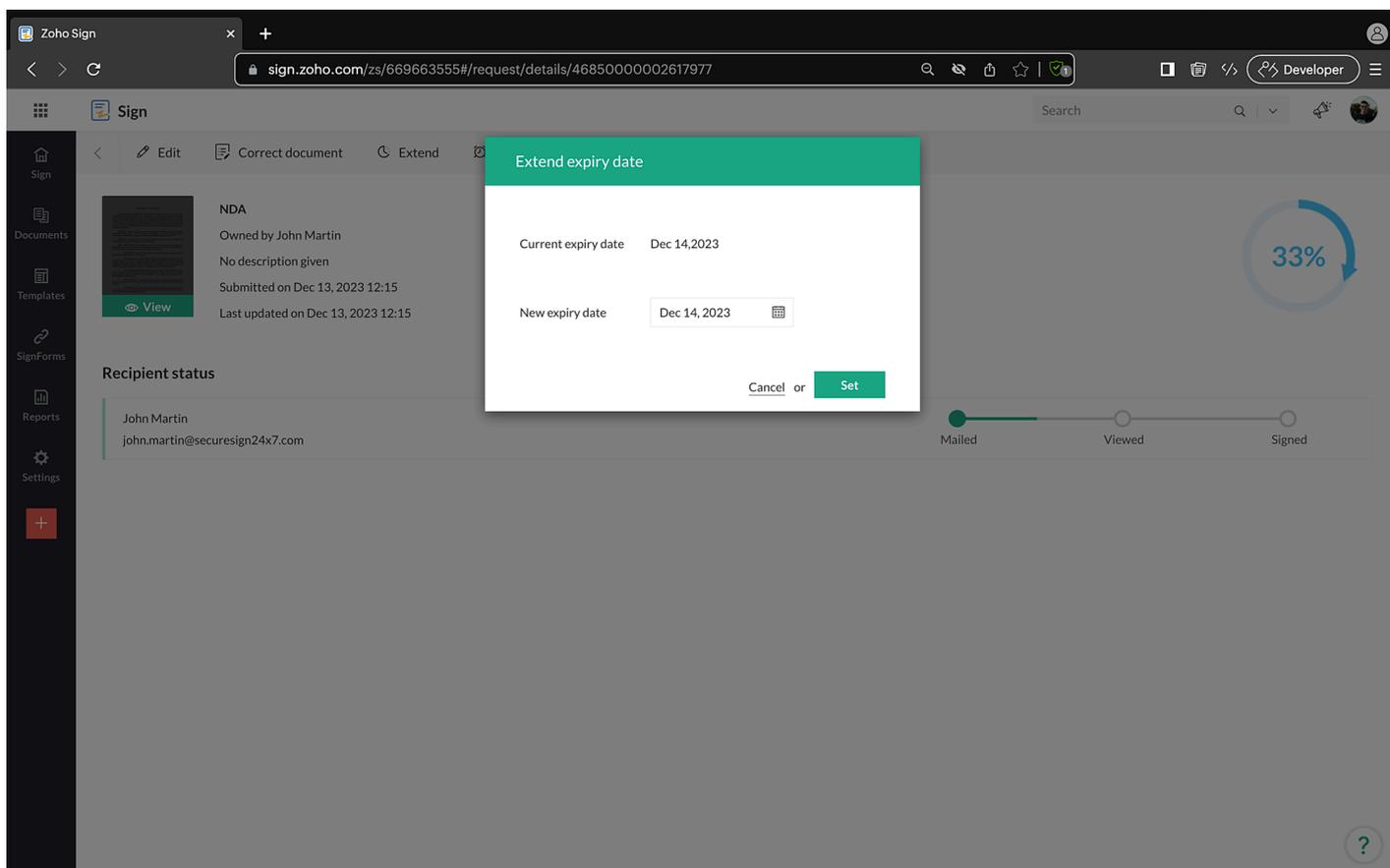
Extend Deadline

You can extend the expiration date set for signing the document without resending it for signature.

- Click **Extend** at the top of your detailed view screen, or select **Extend** from the action menu to open a dialog box.



- Specify the new expiration date and click **Set**.



Activity history

Access the activity history of a document to view a complete audit trail of the document. If a recipient retracts their signature, this can serve as evidence to legally prove that the document has been signed by the recipient.

To check the activity history of a document, click **Activity history** under the ellipsis icon at the top of the document detailed view page.

The activity history cannot be deleted or edited even by the administrator of the organization.

Zoho Sign

sign.zoho.com/zs/669663555#/request/details/4685000002617721

Sign

Completion certificate | Email document | Save to cloud | Download

Assignment of Contract

Owned by John Martin

No description given

Submitted on Dec 13, 2023 11:02

Completed on Dec 13, 2023 11:04

View

Completed

Activity history

John Martin

john.martin@securesign24x7.com

Accessed from IP address 121.244.91.21 using Web at Dec 13, 2023 11:04

Mailed | Viewed | Signed

Document info

Show details for: Assignment of Contract

Document details

Document name	Assignment of Contract
Total pages	2
Document size	394.88 KB

Blockchain transactions

Assignment of Contract

SUCCESS [View more](#)