Zoho Corporation

Getting documents signed in-person using a host

The in-person signing feature allows you to have documents signed using your Zoho Sign account in real-time situations. For example, during sales visits in which you or your field executives are trying to get your customer's signature on some documents to finalize the deal. Using this feature in such scenarios can speed up and simplify the procedure, making it a very useful tool that eliminates the burden of managing and carrying hefty physical paperwork.

The in-person signing feature's workflow involves two categories of end users:
Host: The individual who organises the in-person signing session such as field executives or sales and delivery staff, and ensures that the signer signs the documents. The host must be a part of your organization's Zoho Sign account.
Signer: The individual who signs the document. During the in-person signing session, the signer will take control from the host, sign the documents, and return the control to the host.

In-person signing session involves three steps:

- Adding an in-person signer
- Hosting an in-person signing session
- Signing the documents in an in-person signing session

Adding an in-person signer:

1. Set the recipient action to an in-person signer using the dropdown menu and assign a person (working in the same organization) to host the session.
2. Enter the name and email address of both the host and the signer. You can repeat the above step for any number of recipients and hosts.

3. Click **Continue** to add the required form fields to the document and send out for signatures

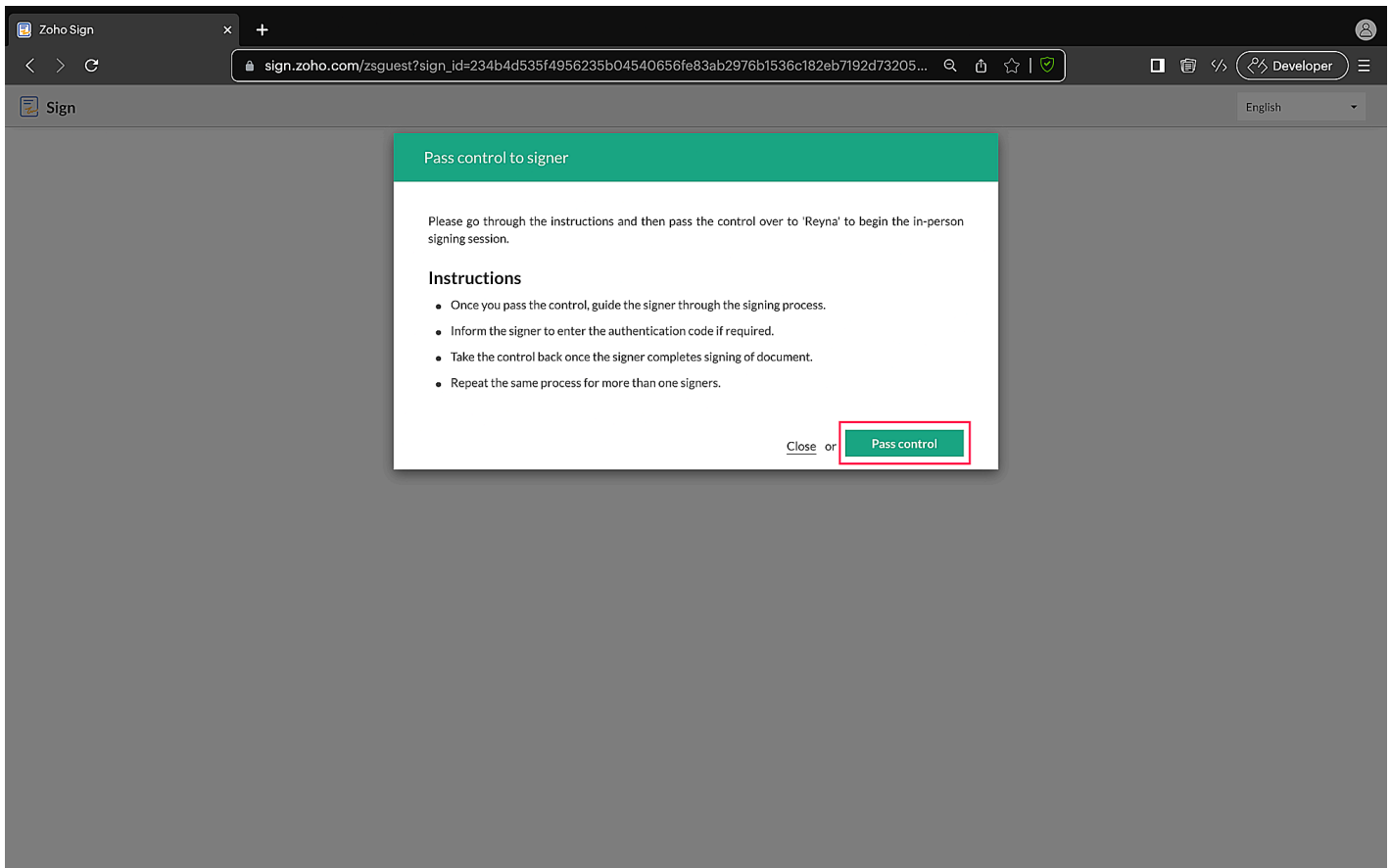**Hosting an in-person signing session:**

1. Check your inbox for an email from Zoho Sign sent on behalf of the sender. This email, also known as the Signature Request email, will contain a link to access the documents that need to be signed by the signer. To start the in-person signing session, click **Host Session.**
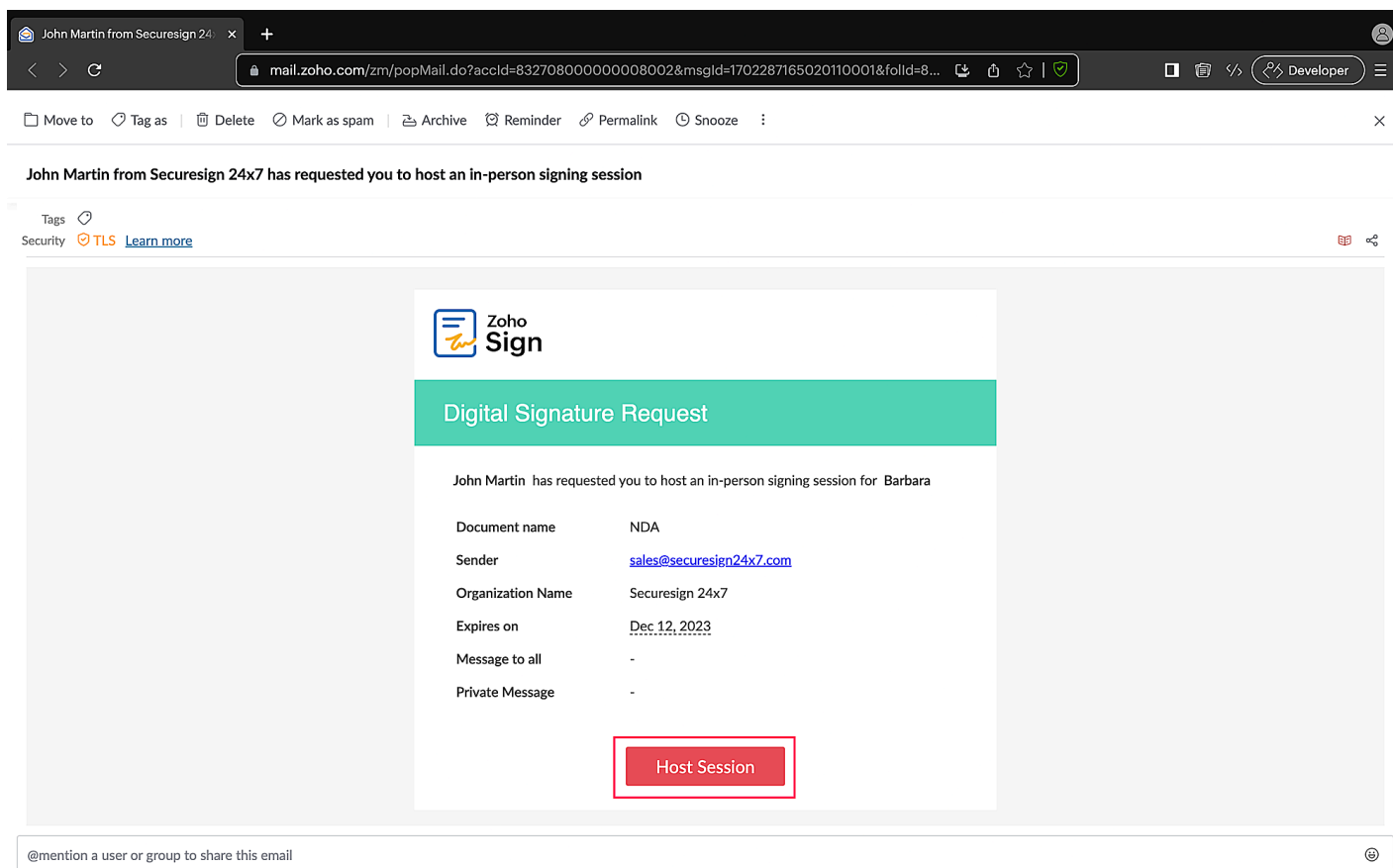
2. If you are not logged into your Zoho Sign account,you maybe prompted to do so.
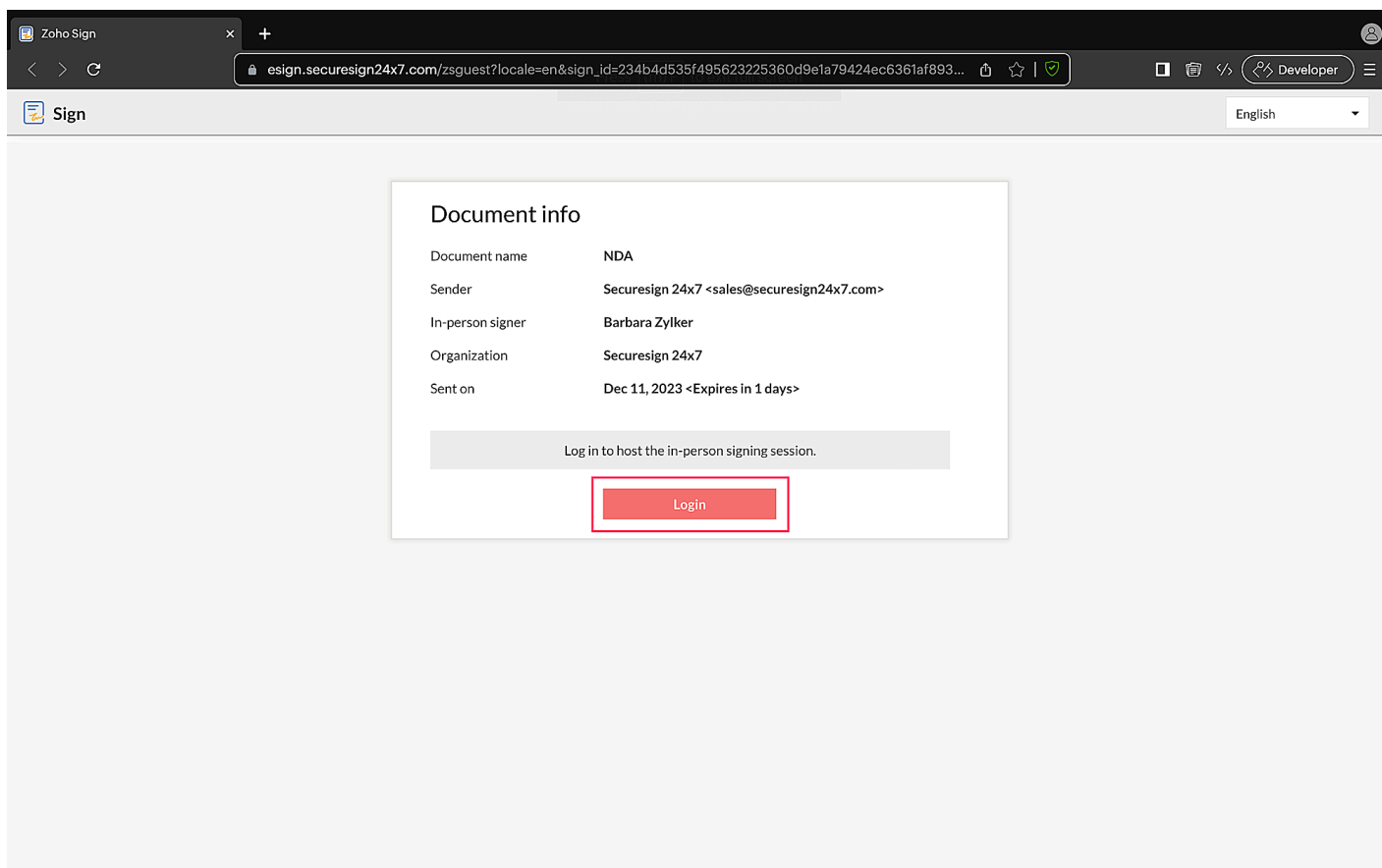
3. If you are already logged into your Zoho Sign account, select the documents that needed signing from your dashboard. If the sender enabled the authentication code, enter the code you receive to your email or SMS and click **Proceed** to document.

4. Upon reading the instructions in the dialog box, click **Pass control** to the signer.

5. After the signer finishes signing the documents, get the control back from them and click **Finish** at the top of your document page to end the in-person signing session.
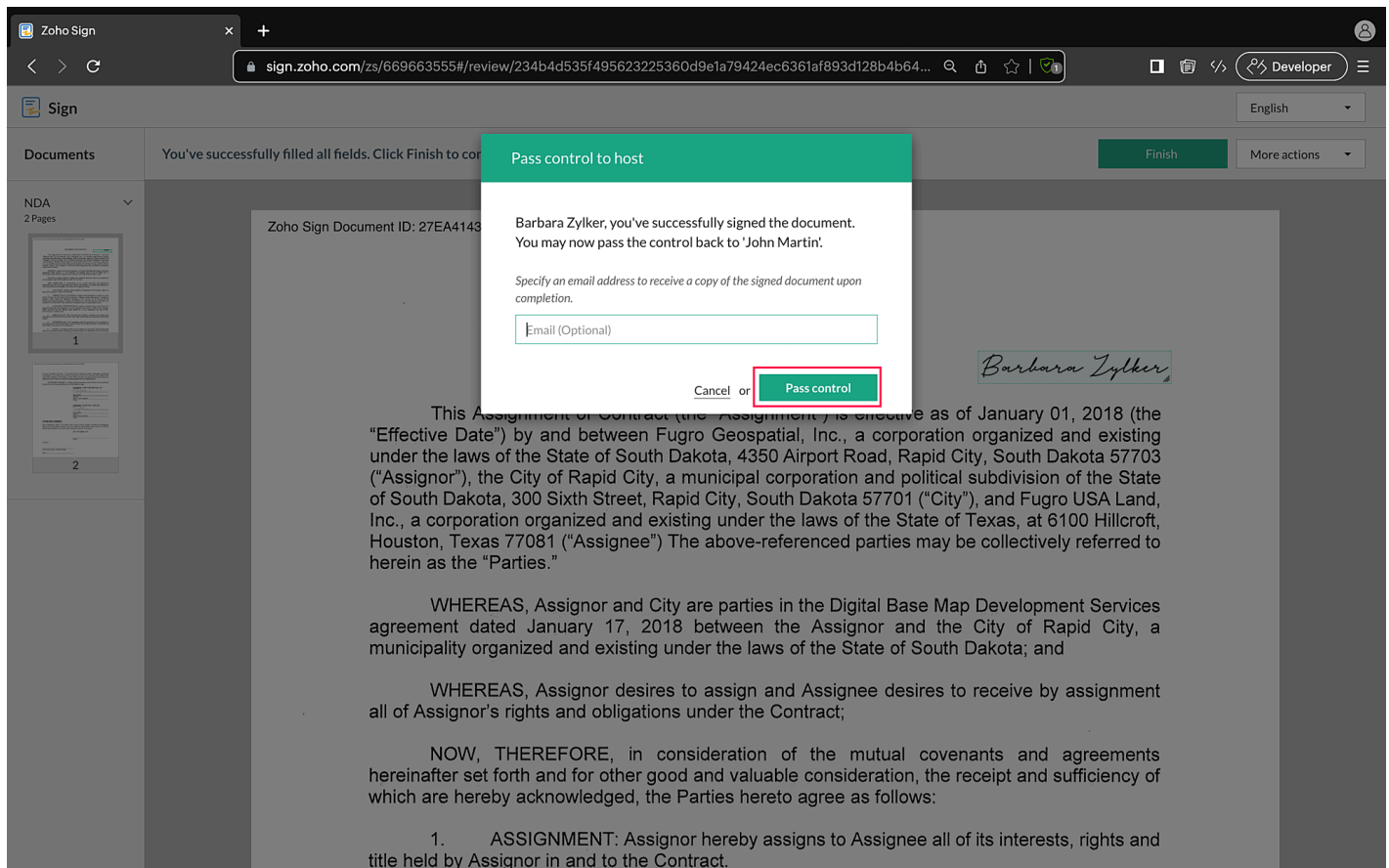
> 📄 **Note:** In case there are multiple signers, choose the signer with whom the session has to be hosted.

Signing the documents in an in-person signing session :

1. Get control of the device containing the documents to sign from the host.
2. Review the document's details and terms and conditions, then click **Agree & Continue** to begin signing.
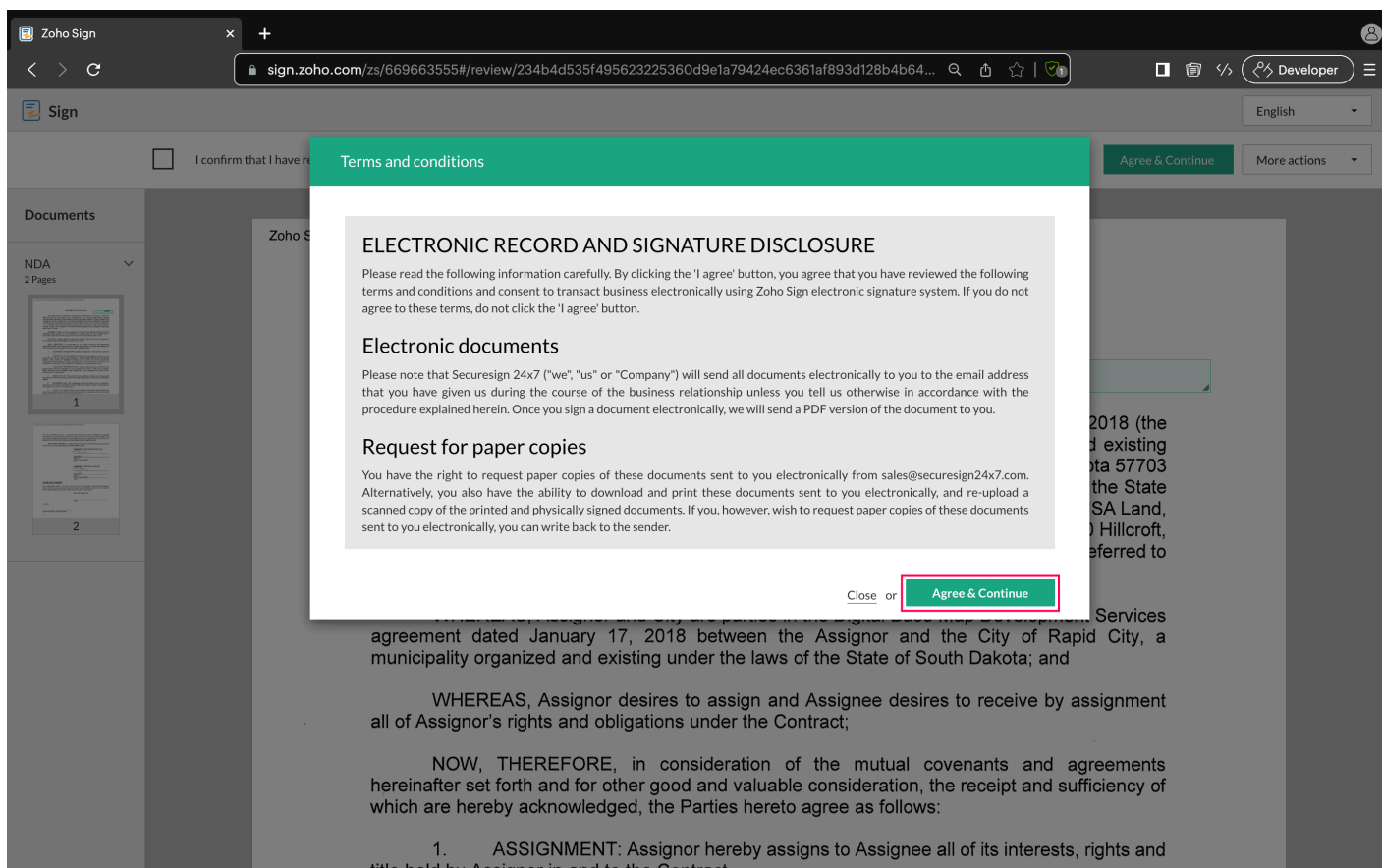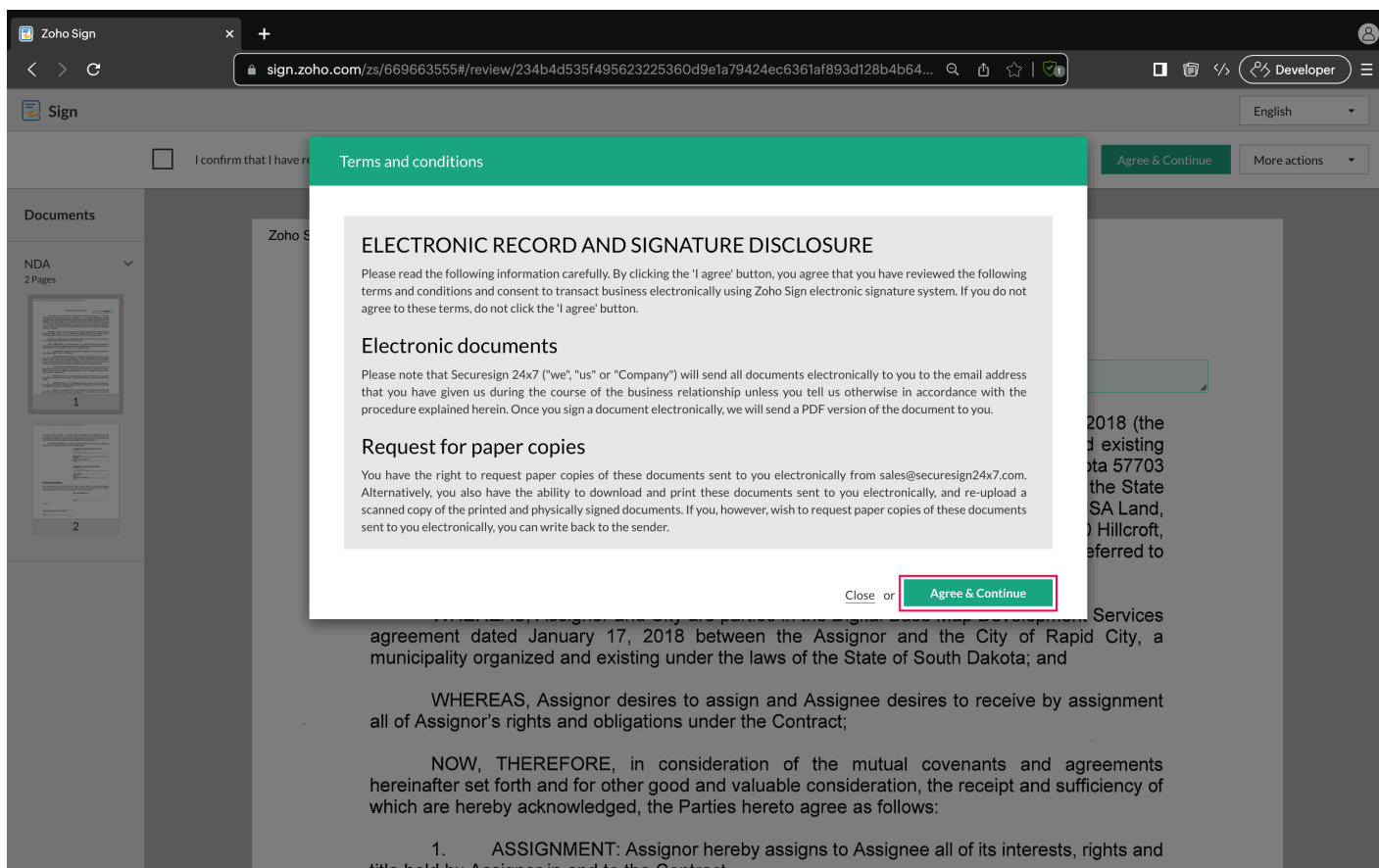
3. Fill in all the mandatory fields in the document and select **Finish** to complete the signing process.

4. You can optionally specify the email address that you would like a signed copy of the documents sent to in the dialog box that opens.

5. Click **Pass control.**