



Recipient Manager

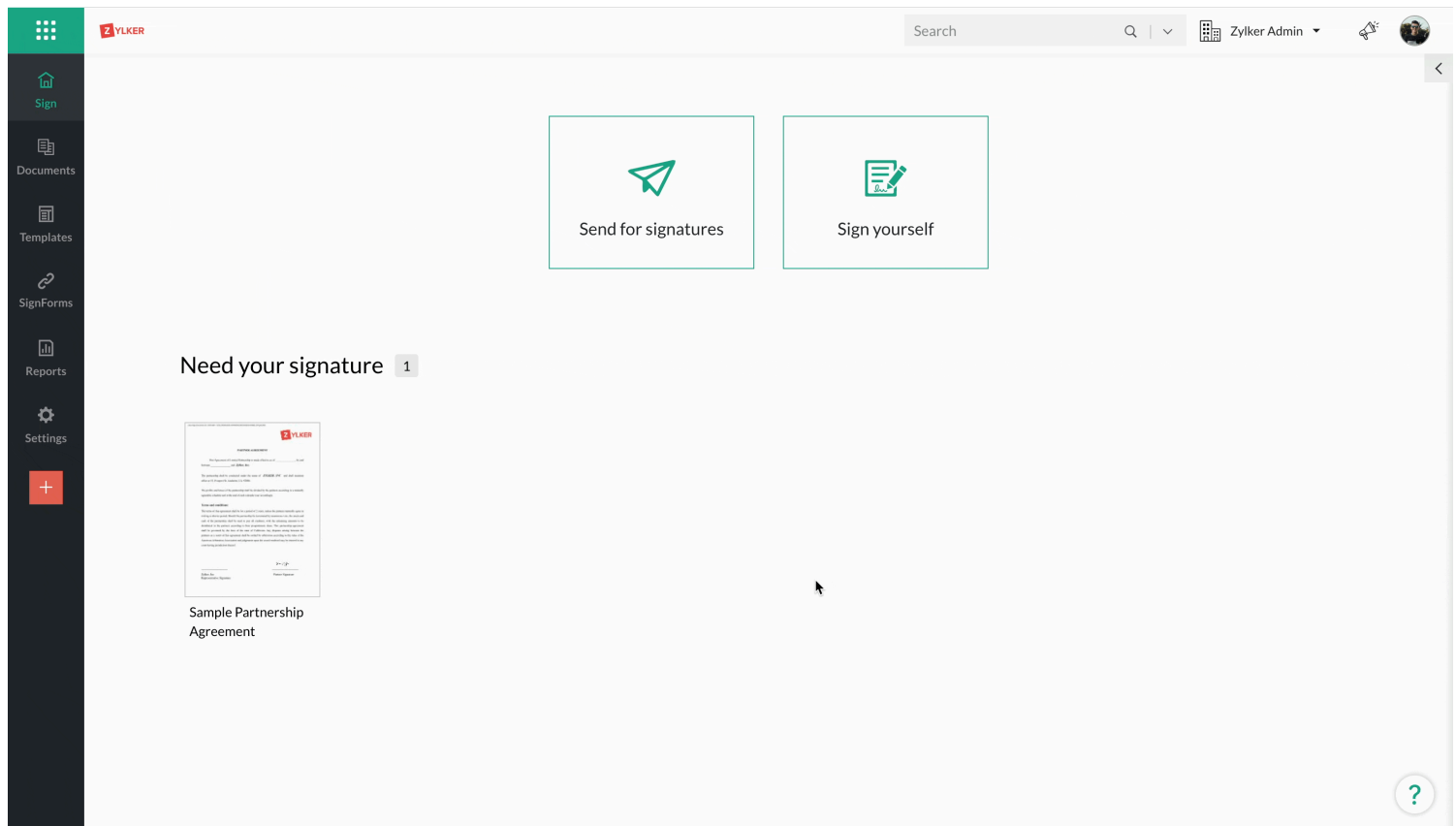
Available in all paid plans

Zoho Sign now allows you to add a "recipient manager" to review and add recipients for your document when you don't know the recipient details while sending the document for signature.

Consider a scenario in the real estate industry where there is an agent who takes care of the communications and contract execution between the buyer and seller. The seller may not know the buyer's email address to get the agreement signed and knows only the broker's details. The Recipient Manager feature will help the seller to get their agreement signed with the buyer by knowing only the broker's email address.

How to create an envelope with Recipient Manager

1. Upload the document, add the recipient, and select **Manages recipient** from the signing action dropdown.
2. You can add up to two recipients per Recipient Manager.
 - a. You can either enter the recipient details or let your Recipient Manager enter them while reviewing the document.
 - b. The recipient can have either ***Need to sign*** or ***Approver*** as their signing action.
 - c. If needed, you can enforce authentication for both your Recipient Manager and the recipient.
3. Click **Continue**.
4. Drag and drop the document fields for your signer and click **Send**.



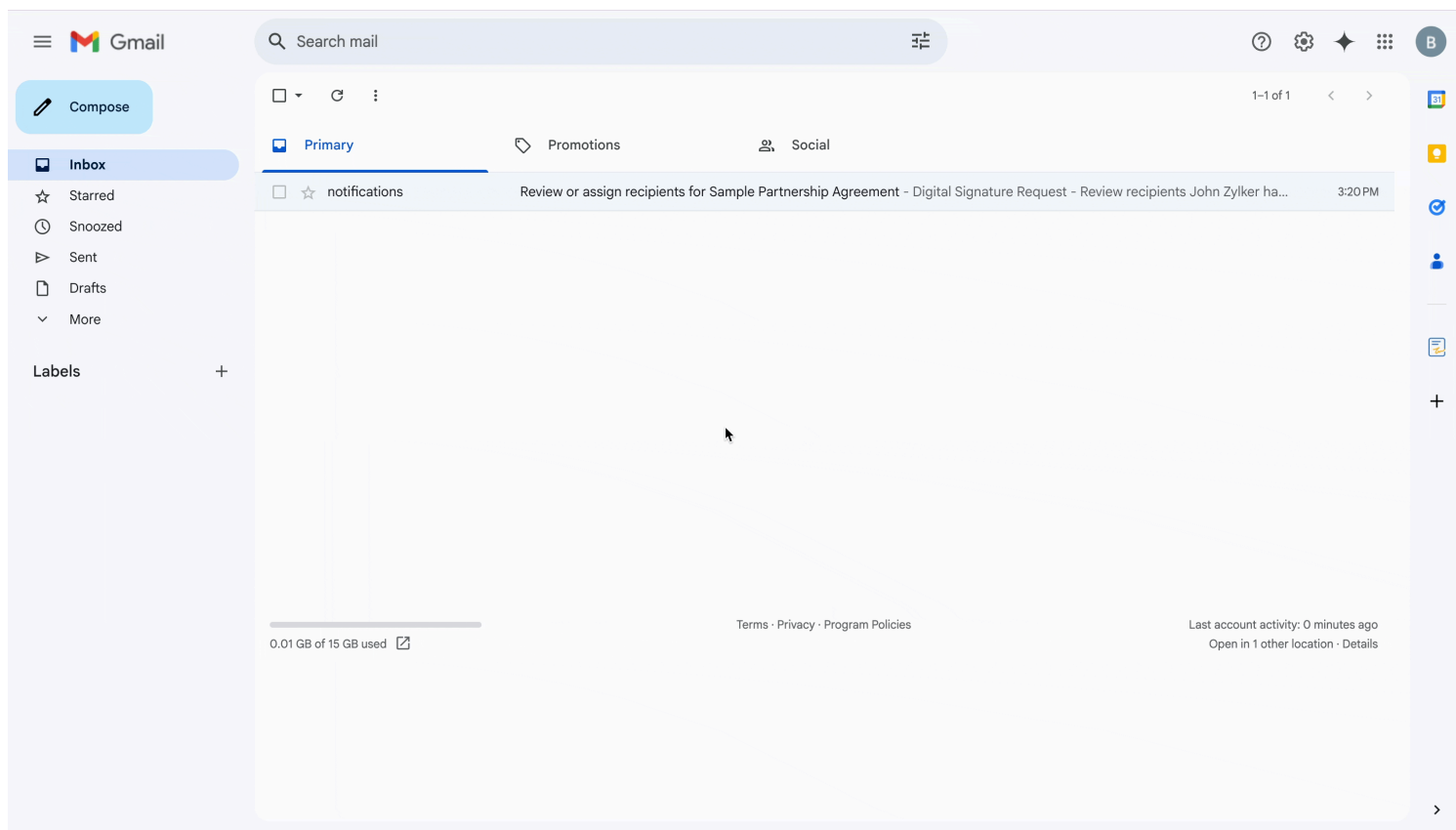
- Recipient Manager is not supported in bulk send.
- A Recipient Manager cannot be a recipient in the same envelope request.
- You cannot have more than two Recipient Managers in an envelope.

What a Recipient Manager sees

The Recipient Manager receives the email to review the document content and assign the recipient for the document.

To assign a recipient:

1. Open the document and click **Review recipients**.
2. The Recipient Manager will be prompted to enter the recipient details - name, email address, country code, and phone number.
3. Click **Confirm**. The document will be sent to the recipient.



i The experience of the signers remains the same as it usually does with Zoho Sign.

Where can I find the recipients assigned by the Recipient Manager?

You can find the details about the Recipient manager, the IP addresses of the Recipient Manager and the recipients, timestamp, authentication method used (for the signer and recipient manager), and device used to sign the document of both the signer and the Recipient Manager in the document details page.

To view and download your signed document:

1. From your Zoho Sign dashboard, click **Documents** > **Document name**.
2. You can download the completion certificate, signed document, or view the complete audit trail by clicking **More Actions** > **Activity history**.

