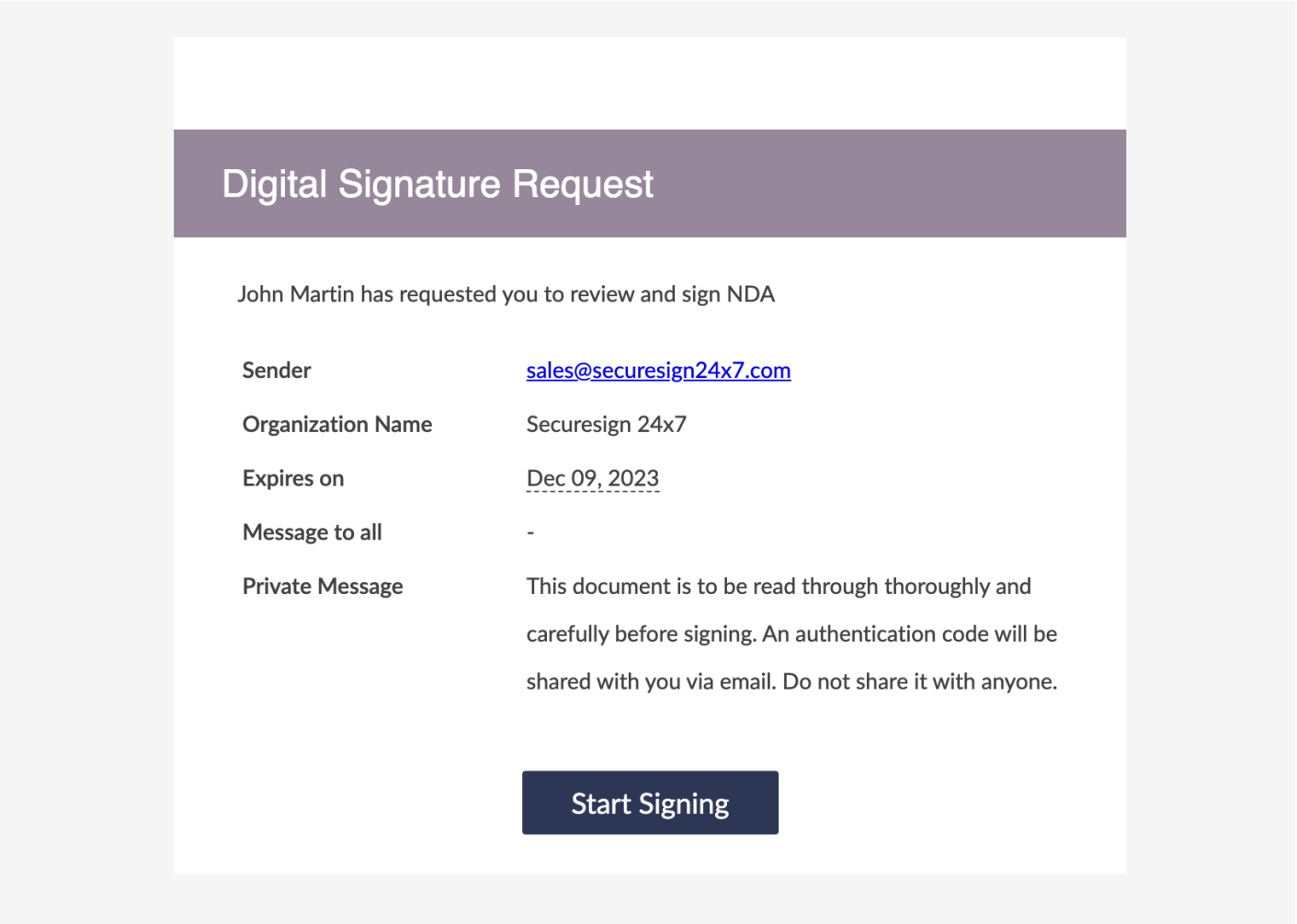
Signing documents from SMS and email

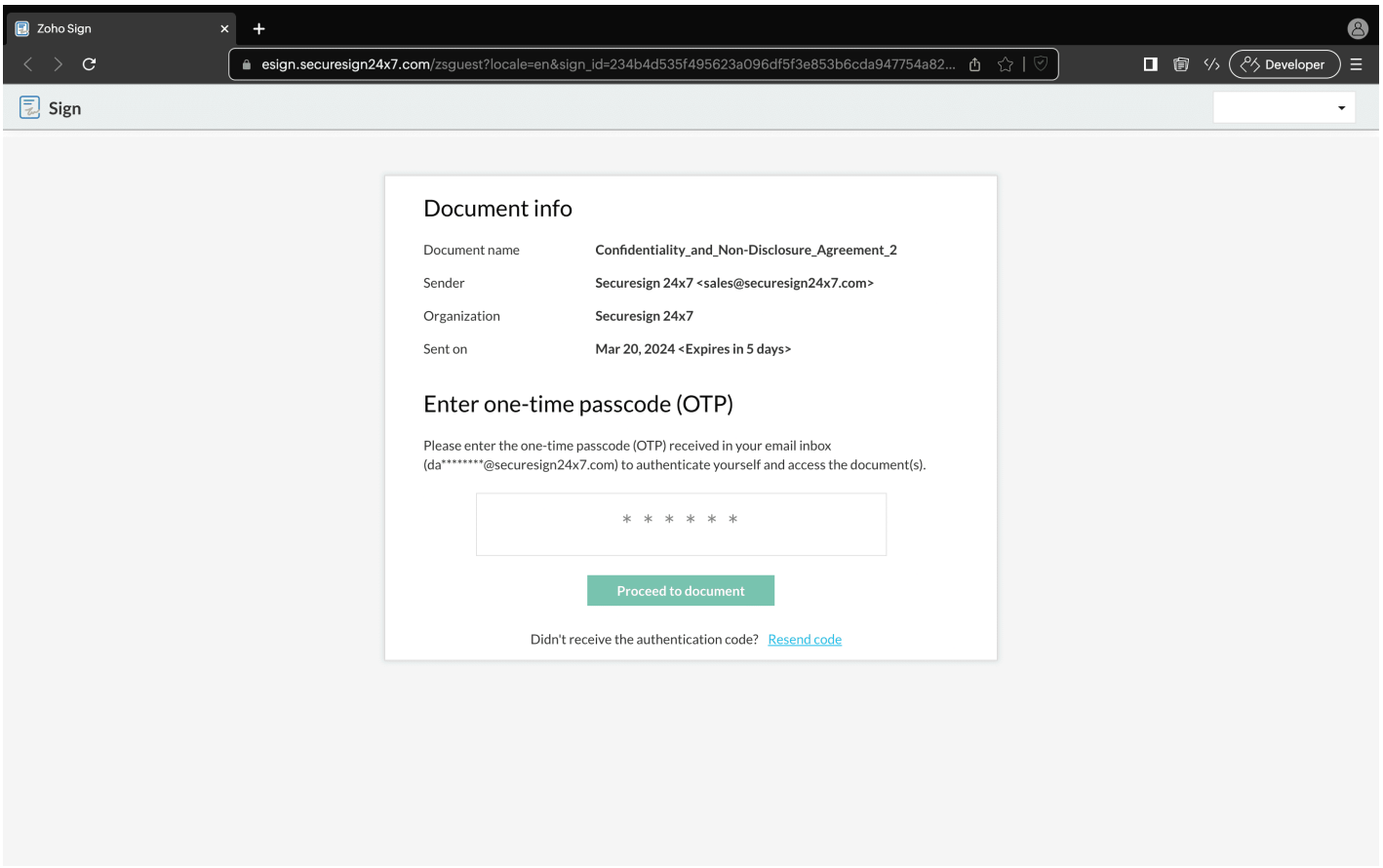
In addition to signing documents directly from the Zoho Sign dashboard, recipients can also access documents from their email inbox and their SMS inbox.

Signing documents from email

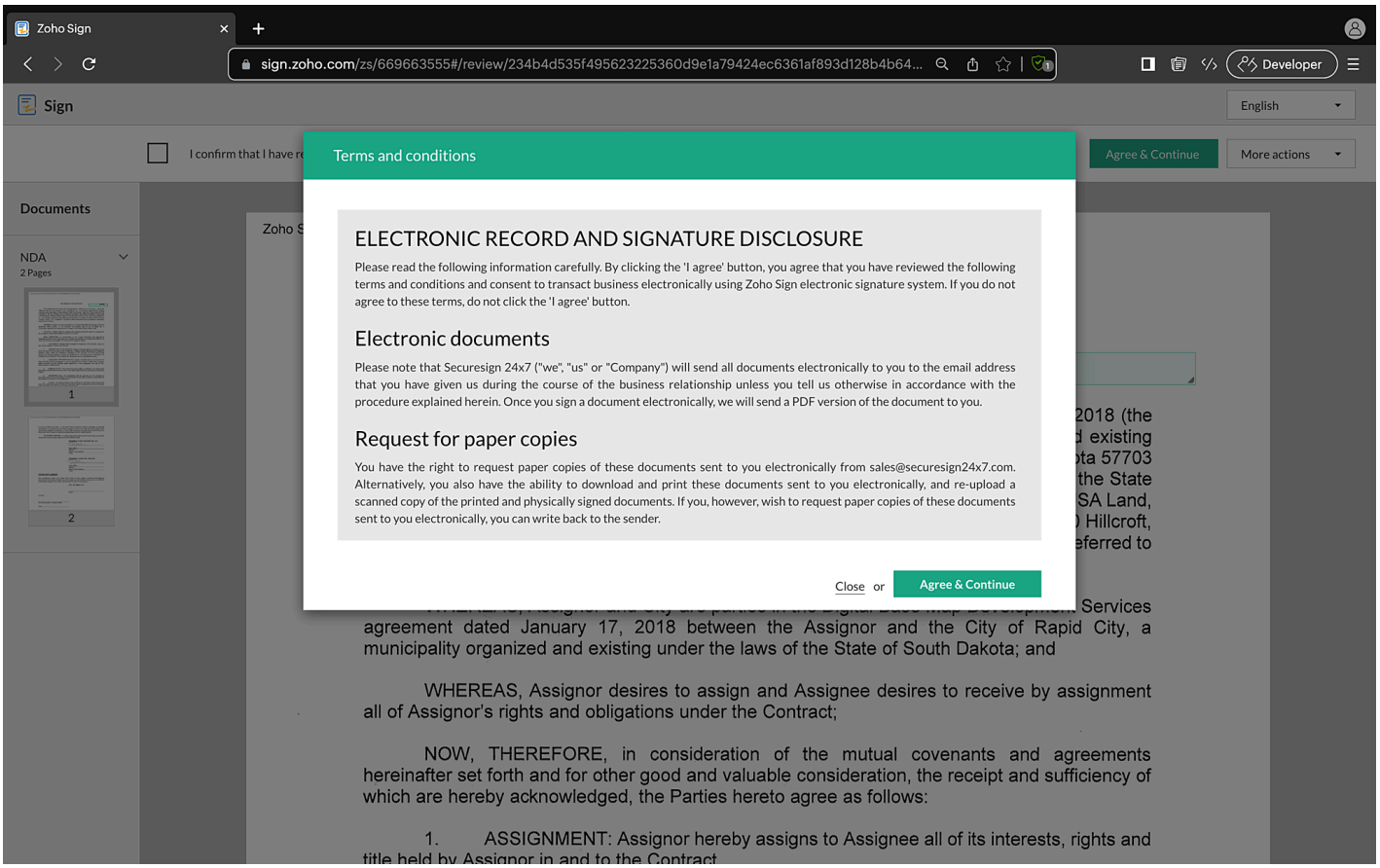
1. From your email inbox, click the email that contains the document signing link.
2. You can find the document details like the sender's email address, document expiry, and a message to all and a private note (if set by the sender).



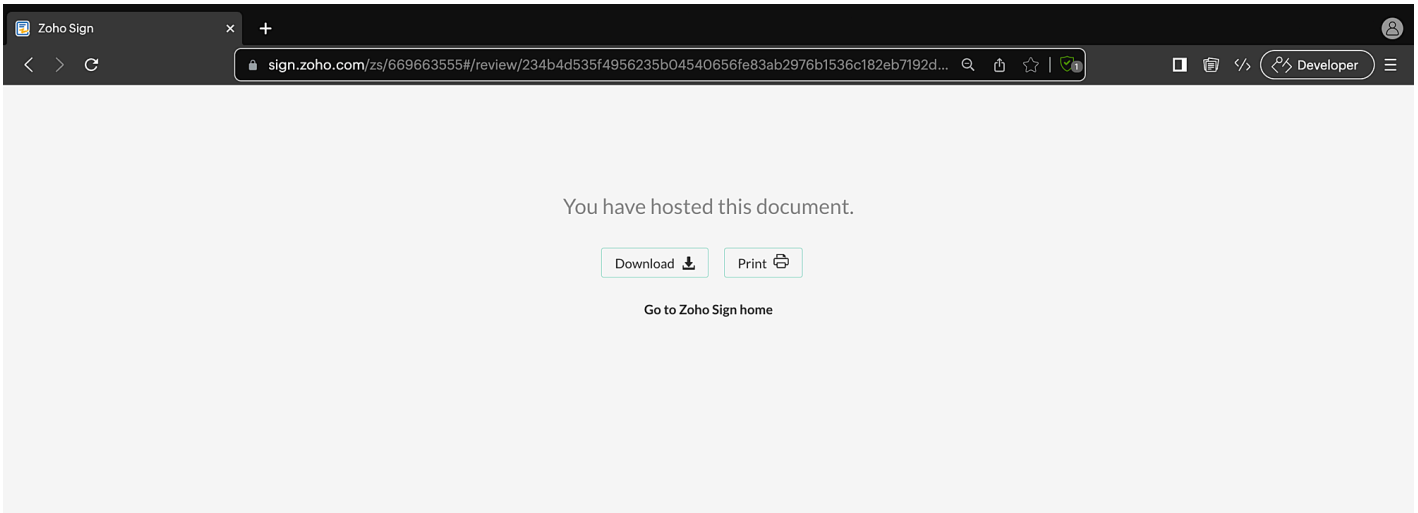
3. Click **Start Signing**.
4. You will be redirected to a document info page.



5. If your sender has enabled a verification method, you will need to verify yourself to access the document.
6. In case of email, SMS, or offline OTPs, enter the OTP and click **Proceed to document**.
7. Read the terms and conditions and click **Agree & Continue**.



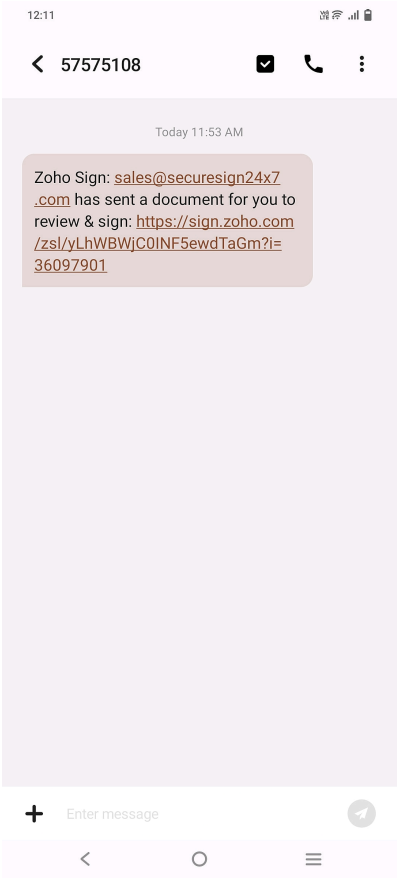
8. Fill in the form fields and click **Finish** to complete the signing process.
9. You can also choose to print or download the signed document.



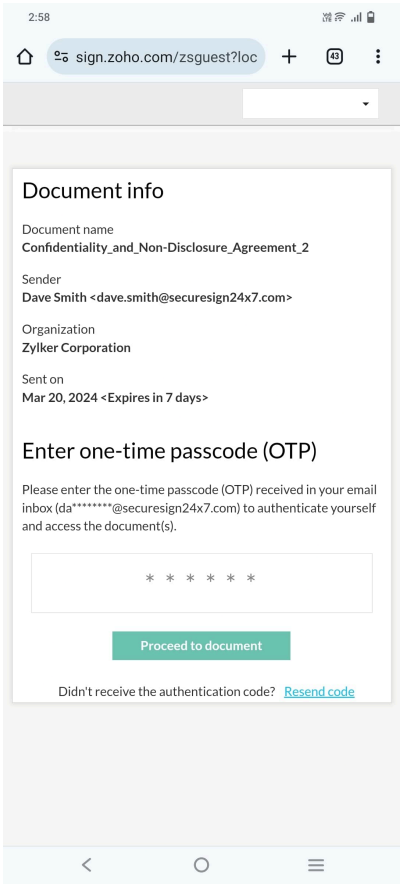
Signing a document from SMS

Signing documents from SMS (via mobile) provides a faster and easier way to authorize and sign documents on the go.

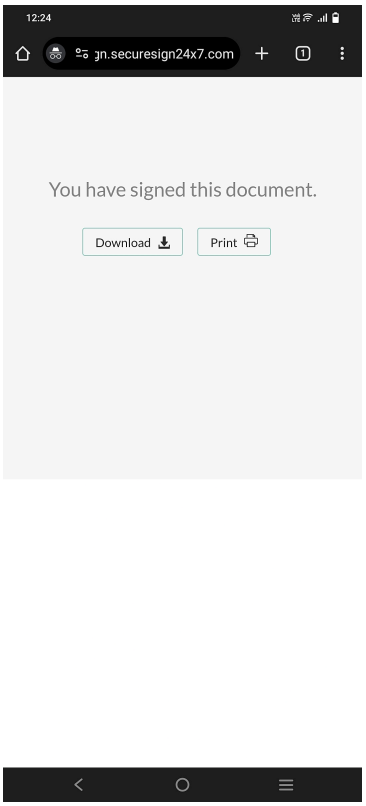
1. Your recipient will receive the signing request via SMS.



2. If your recipient's identity needs to be verified by you before signing, your recipient will receive an OTP via email, SMS, offline (in this case, you should receive the code directly from the sender), or KBA (Knowledge-based authentication).



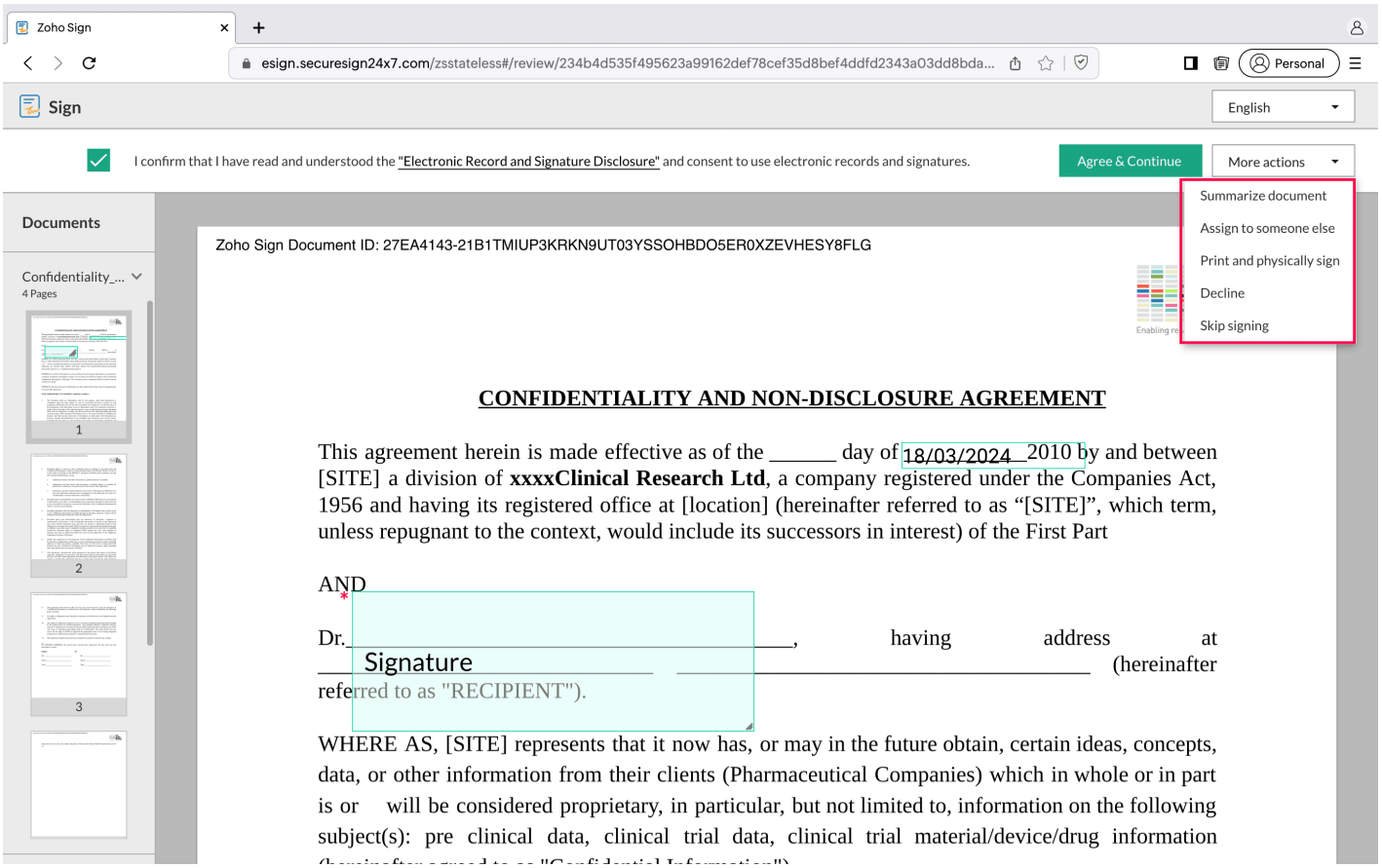
3. Upon successful verification, your recipient will be redirected to the document viewer page.
4. Once the terms and conditions are read, click **Agree & Continue**.
5. Fill in the signer fields and click **Finish** to complete the signing process.
6. Your recipient can also choose to print or download the signed document.



Other signer actions

After accessing the document, your recipient can also choose to perform the following actions:

- Summarize document
- Assign to someone else
- Print and physically sign the document
- Decline signing
- Skip signing



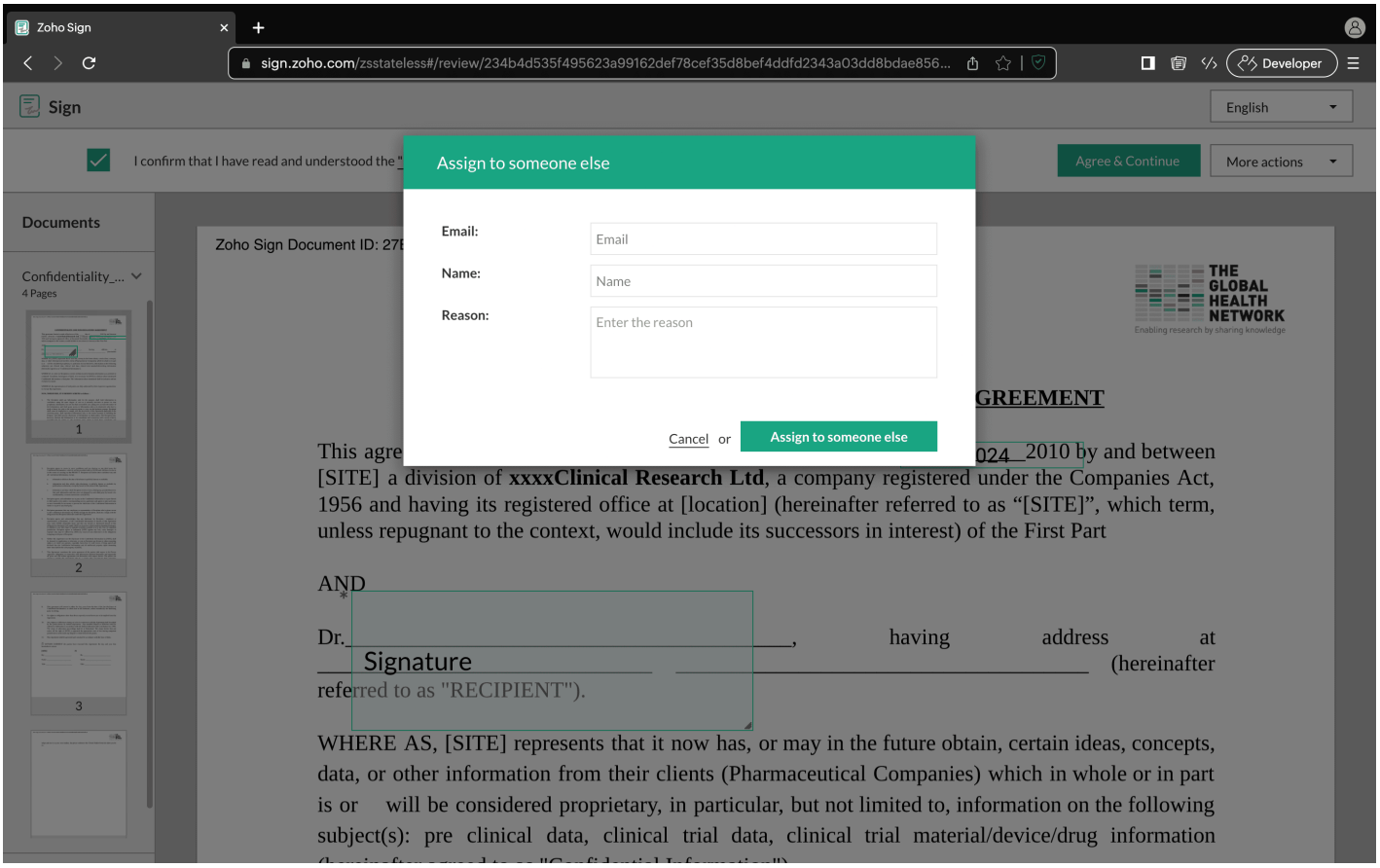
Summarize document

Zoho Sign now leverages an integration with ChatGPT via Zia, our AI-powered assistant, to offer a quick contextual summary of long documents. This integration allows Zia to fetch data from the documents in Zoho Sign and share them with ChatGPT for generating appropriate responses that can be used in various scenarios. **Click here to learn how to enable text summarization in documents via Zia using ChatGPT**.

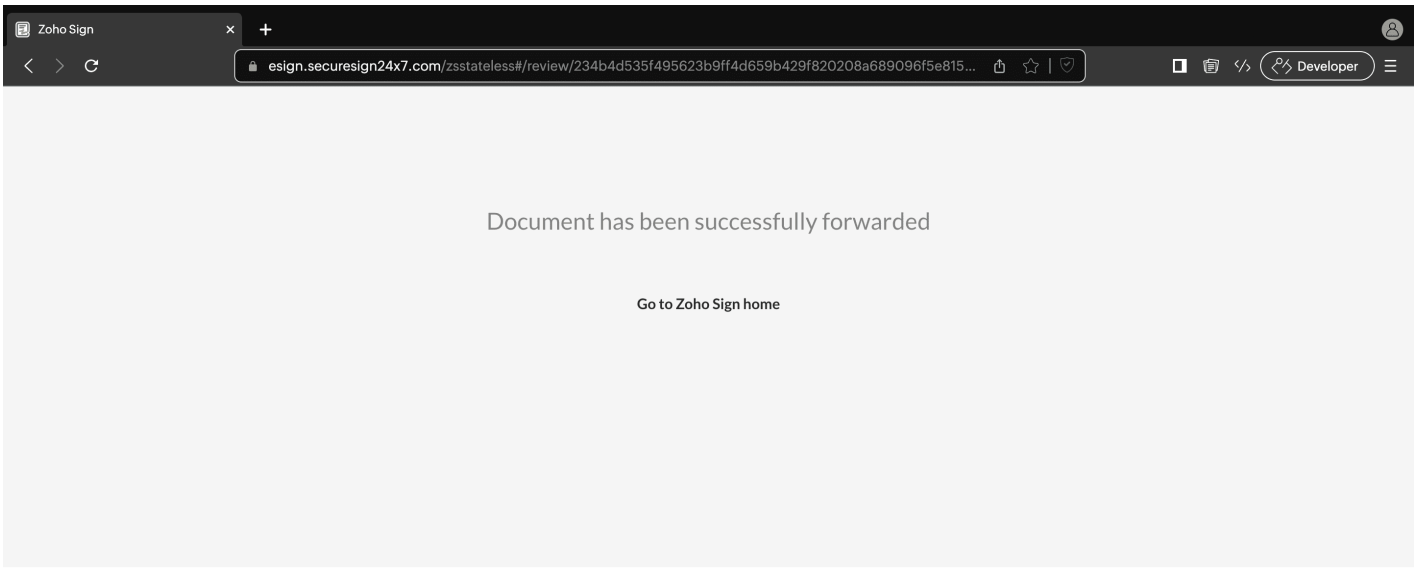
Assign to someone else

1. If you want someone else to sign the document on your behalf, choose **Assign to someone else**.

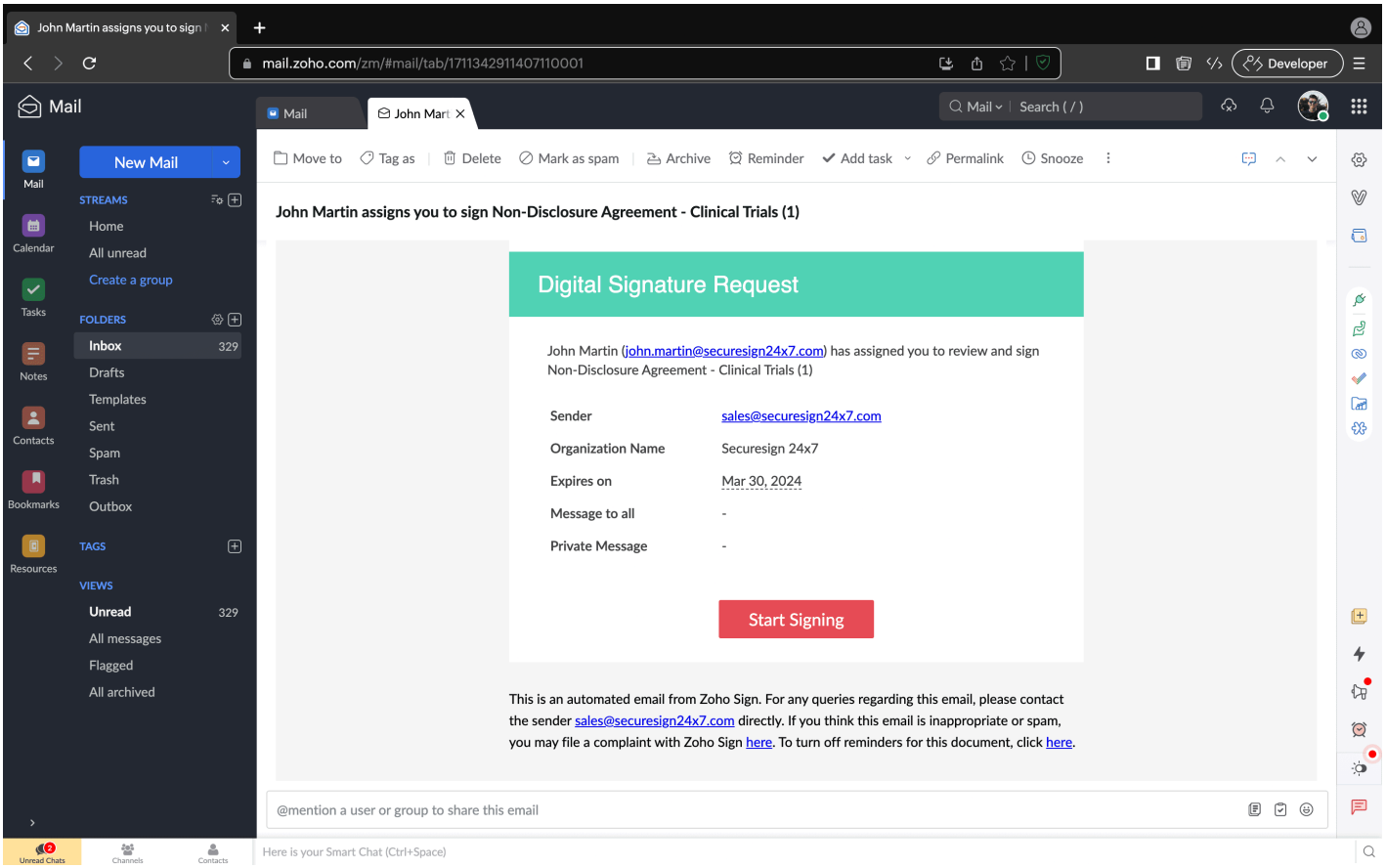
2. Proceed to enter the **Email**, **Name**, and the **Reason**, then click **Assign to someone else**.



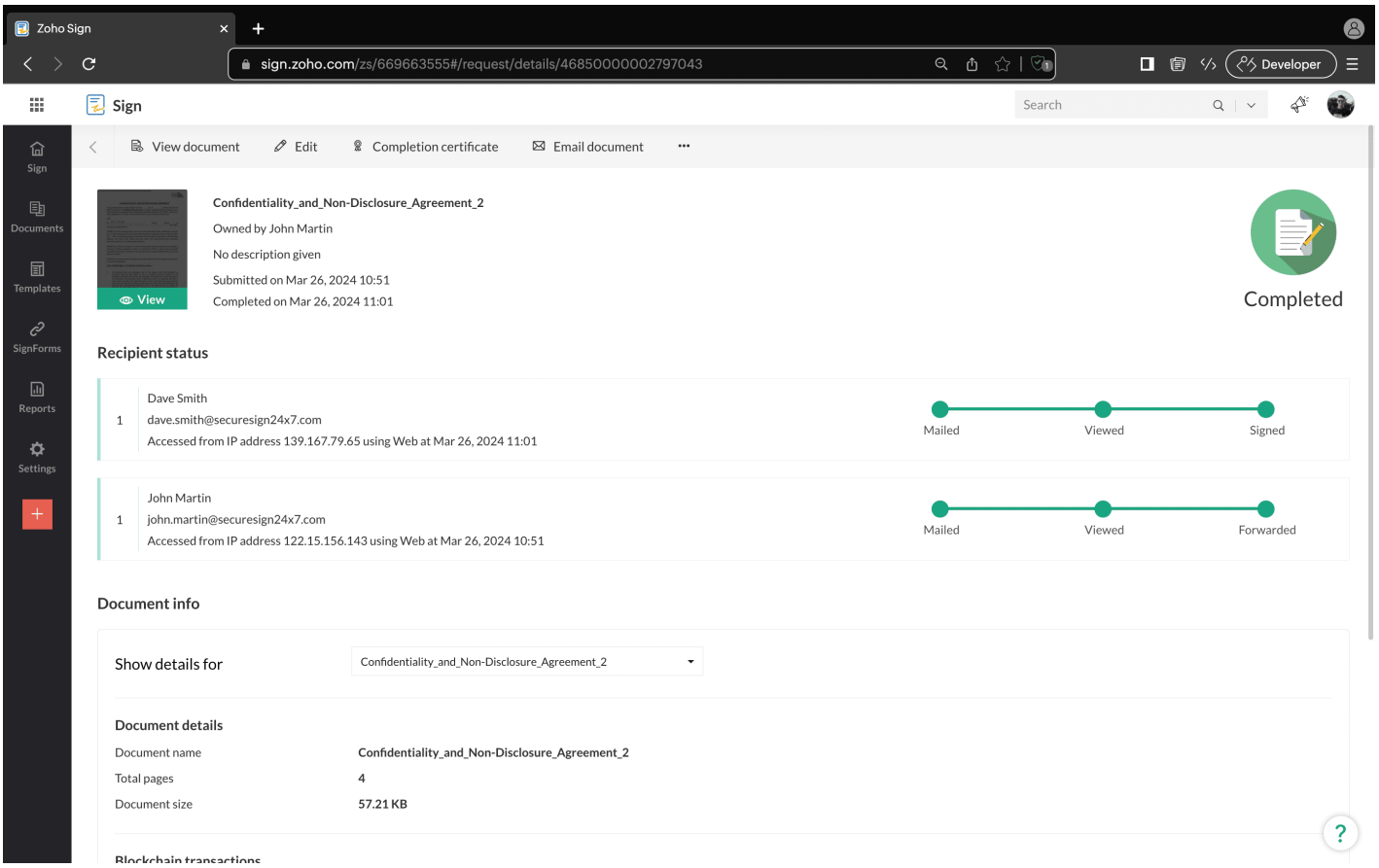
3. The document will then be forwarded to the assigned individual.

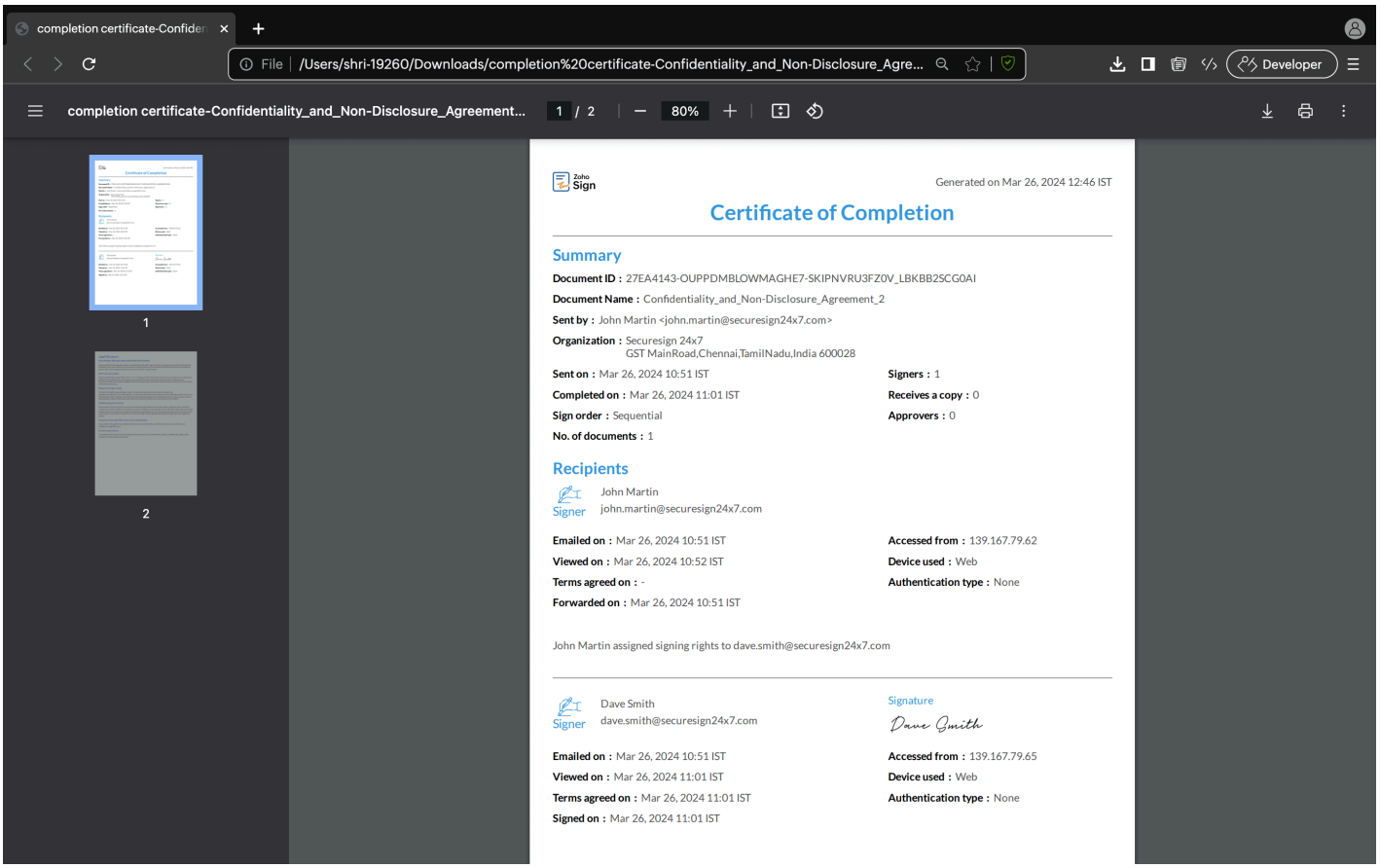


4. The assigned individual will receive the document signature request, and they can complete the signing process.



5. Once the document has been forwarded to someone else, the former recipient will only be able to view the document and cannot perform any signing action. They will be able to view the envelope after the signing action is complete, and the forwarded action will be audited within their Zoho Sign account and in the completion certificate.





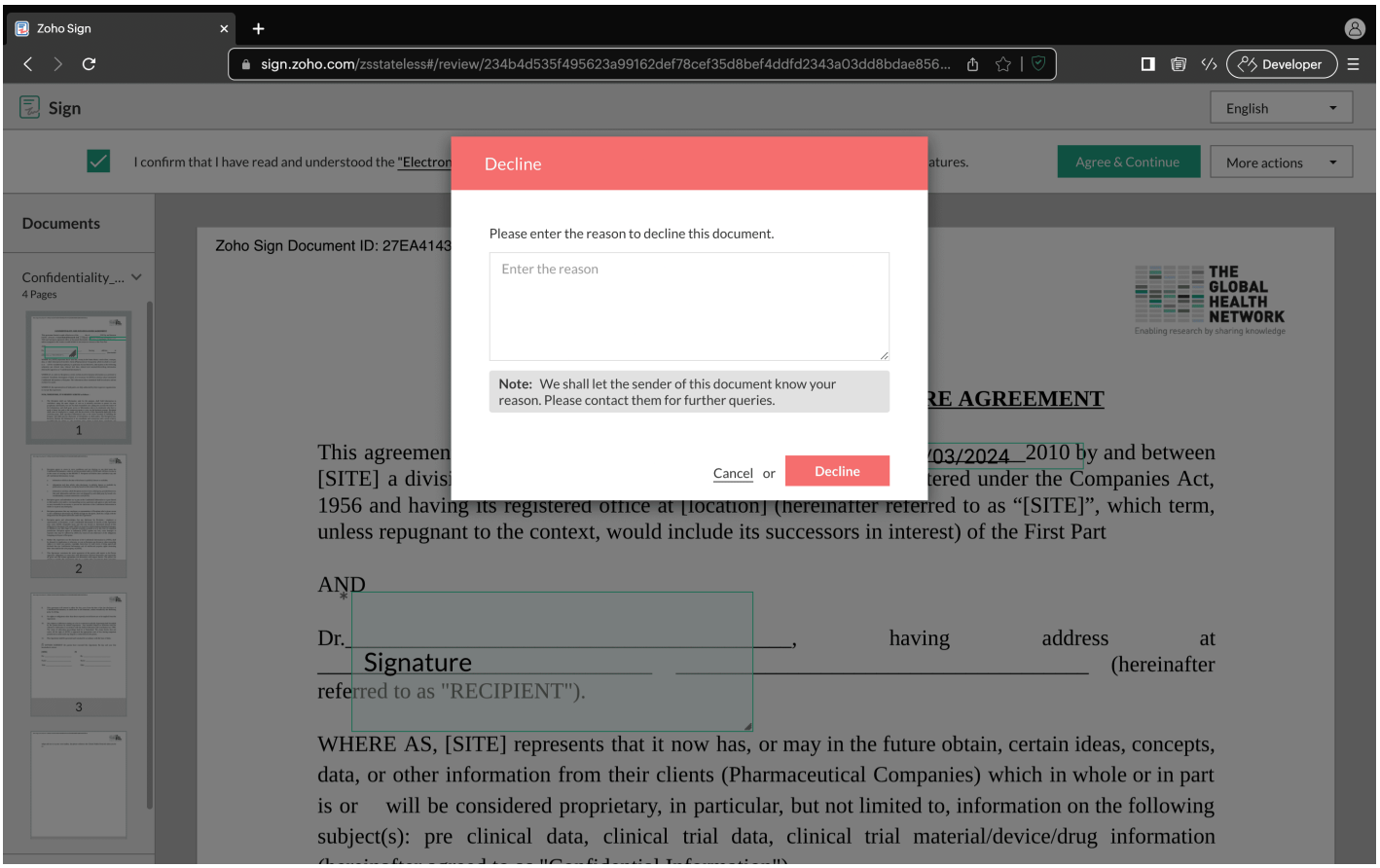
Print and physically sign

1. If you'd like to print and physically sign the document, choose **Print and physically sign**.
2. Download and print the document.
3. Sign the document manually and upload the scanned copy.
4. Click **Finish**.

[Click here to learn how your recipients can print and sign documents](#).

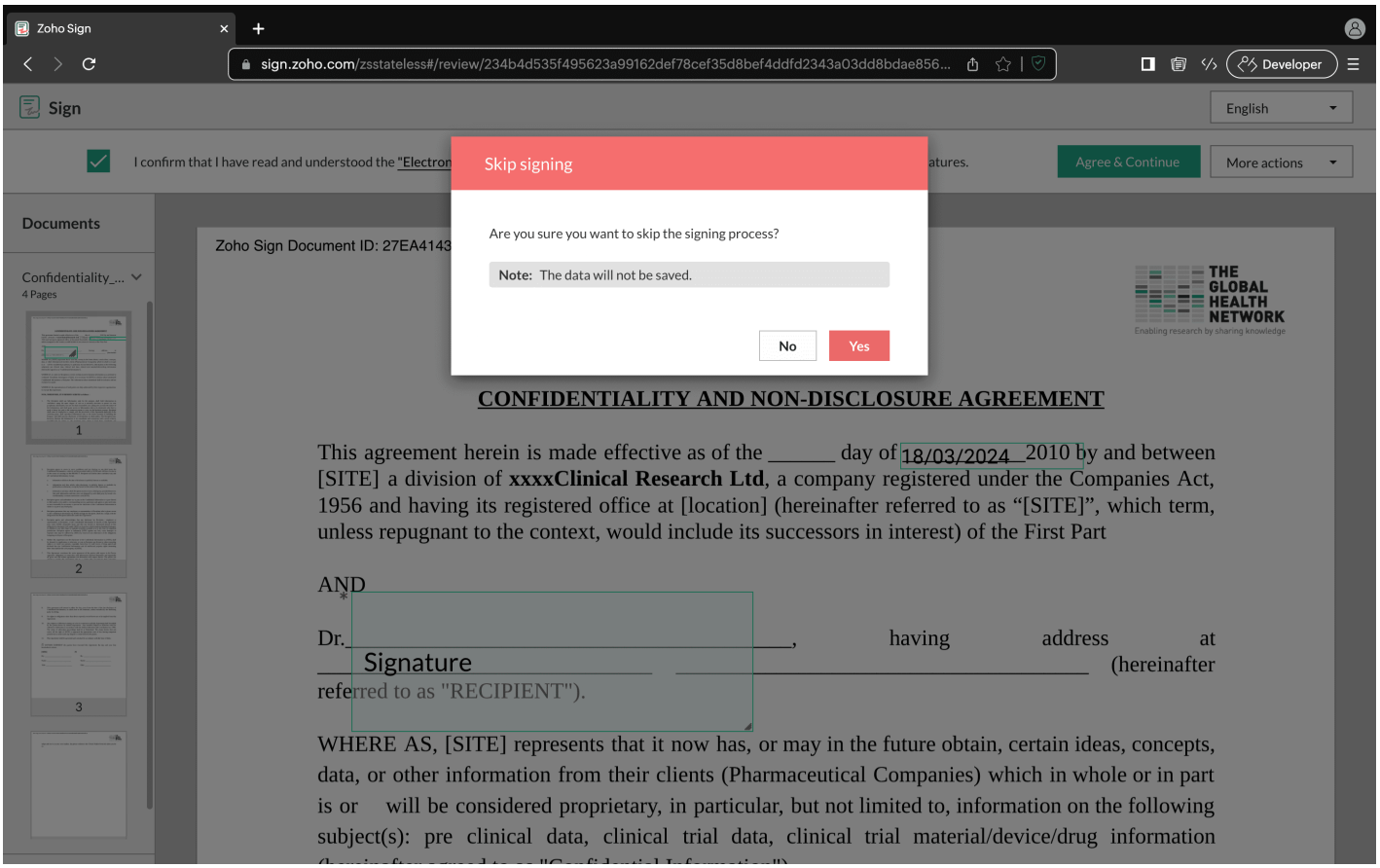
Decline

1. If you don't want to sign the document, choose **Decline**.
2. Enter the reason for declining to sign the document.
3. Click **Decline**.



Skip signing

1. If you'd like to skip signing for now and continue signing the document later, you can choose **Skip signing**.
2. On the pop-up that appears, click **Yes**.


Zoho Sign
sign.zoho.com/zsstateless#/review/234b4d535f495623a99162def78cef35d8bef4ddfd2343a03dd8bdae856...
Developer
Sign
English
I confirm that I have read and understood the "Electron
atures.
Agree & Continue
More actions
Skip signing
Are you sure you want to skip the signing process?
Note: The data will not be saved.
No
Yes
Documents
Confidentiality_...
4 Pages
Zoho Sign Document ID: 27EA4143
THE GLOBAL HEALTH NETWORK
Enabling research by sharing knowledge
CONFIDENTIALITY AND NON-DISCLOSURE AGREEMENT
This agreement herein is made effective as of the _____ day of 18/03/2024 2010 by and between [SITE] a division of xxxxClinical Research Ltd, a company registered under the Companies Act, 1956 and having its registered office at [location] (hereinafter referred to as "[SITE]", which term, unless repugnant to the context, would include its successors in interest) of the First Part
AND
Dr._____, having address at _____ _____ (hereinafter referred to as "RECIPIENT").
Signature
WHERE AS, [SITE] represents that it now has, or may in the future obtain, certain ideas, concepts, data, or other information from their clients (Pharmaceutical Companies) which in whole or in part is or will be considered proprietary, in particular, but not limited to, information on the following subject(s): pre clinical data, clinical trial data, clinical trial material/device/drug information