Alchemer Workflow Zoho Sign Initiator

> The Zoho Sign initiator is available for purchase as an add-on. If you are interested in purchasing, please contact us for additional information.

Overview

Alchemer's Zoho Sign initiator is purpose-built to enhance Workflow efficiency and facilitate feedback collection within your business processes. With this integration, events that occur in Zoho Sign can automatically trigger Workflows in Alchemer, enabling you to gather valuable feedback at key touch points.

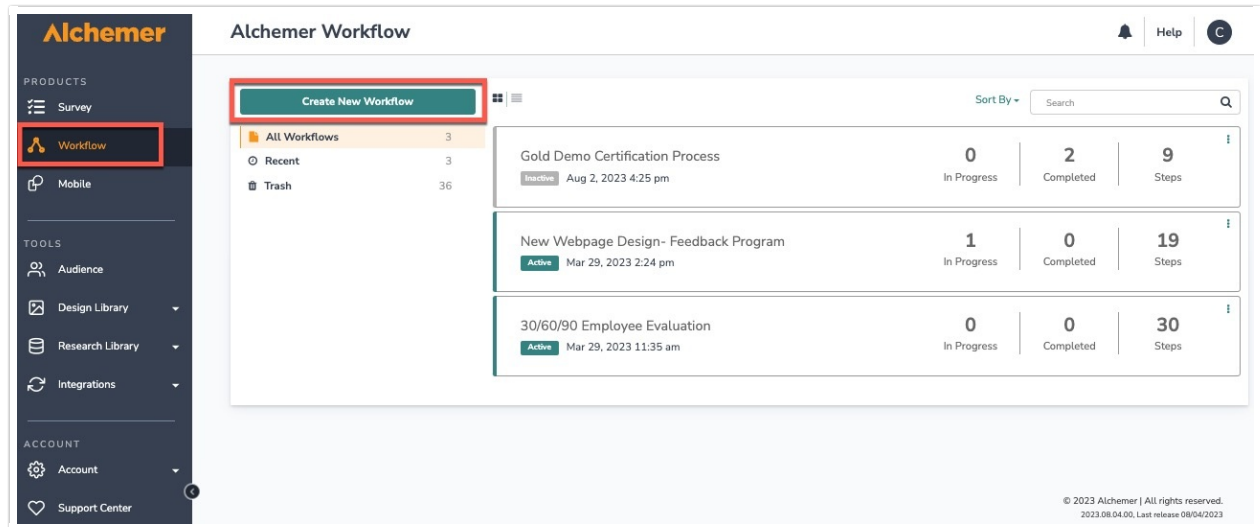You can initiate workflows whenever the following events occur in Zoho Sign:

Event Sent For	Description
Sent	Triggers when documents are sent for signatures.
Viewed	Triggers when documents are viewed by one of the recipients.
Signed by a recipient	Triggers when documents are signed or approved by one of the recipients.
Completed by all	Triggers when documents are completely signed and approved by all recipients.
Declined	Triggers when documents are declined by one of the recipients
Reassigned	Triggers when documents are reassigned by one of the recipients to be signed or approved by another person.
Expires	Triggers when documents are sent for signatures and the approval expires.
Recalled	Triggers when documents are sent for signatures or approval are recalled by the sender.

> The Zoho Sign initiator uses webhooks. Learn more about creating webhooks in Zoho Sign
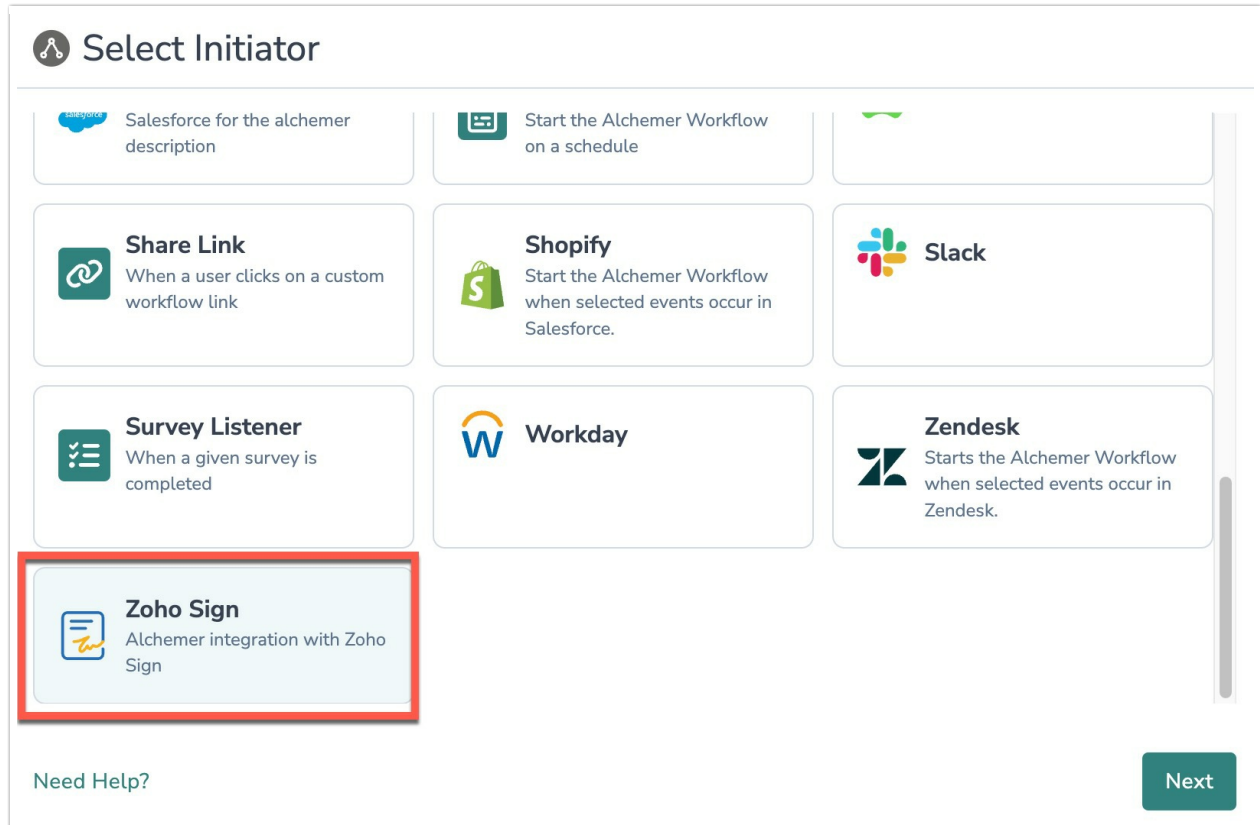
Setup

1. Create a new Workflow.

2. Name your Workflow.

3. After creating a new Workflow, select Zoho Sign as your Workflow initiator.

4. Select "Zoho Sign Webhook" and click the "Next" button.

Select Action

Zoho Sign Webhook
Start a Workflow using a Zoho Sign webhook.

Need Help?   Previous   **Next**

5. Hit "Next" on the initiator overview screen.

Configure Initiator

Zoho Sign | Webhook

Starts a Workflow using a Zoho Sign webhook.

You will need:
- The webhook URL provided on the next screen
- To setup the webhook in Zoho Sign

Zoho Sign webhook events:
- Sent
- Viewed
- Signed by recipient
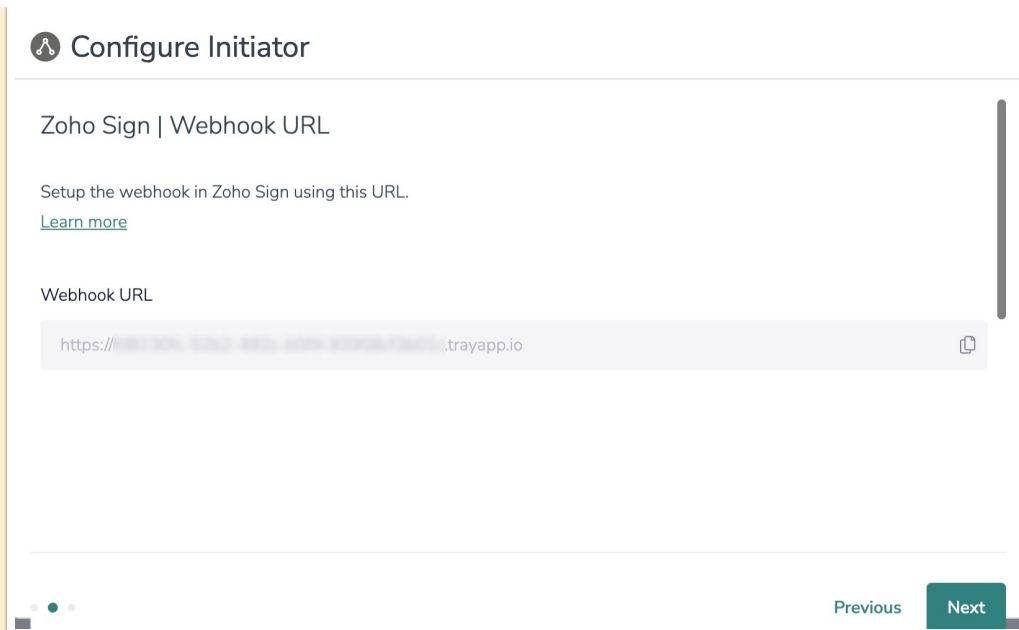- Completed by all
- Declined
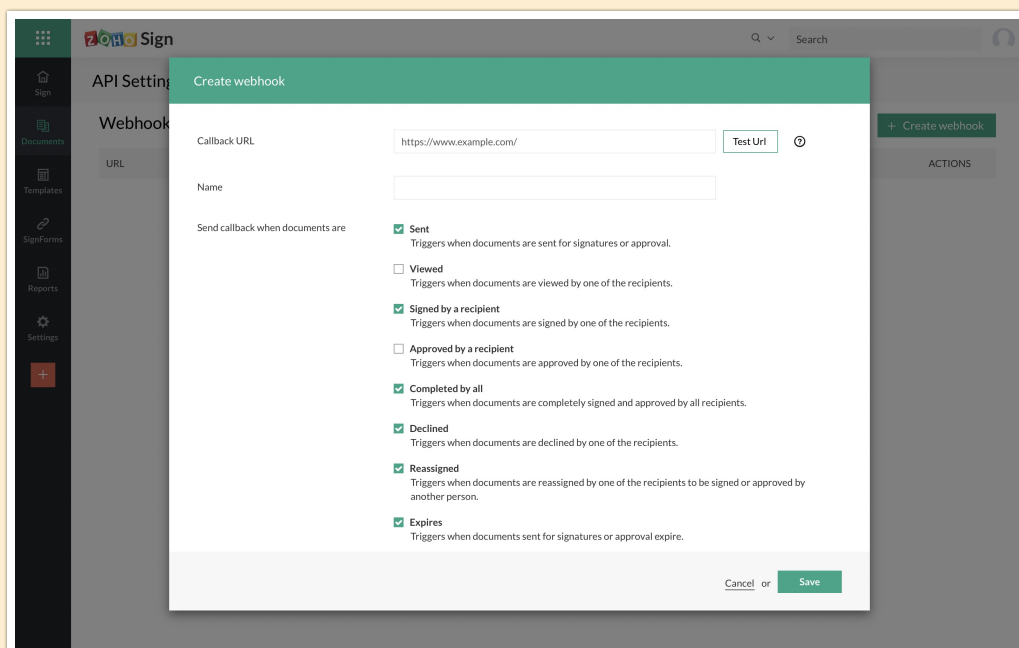- Reassigned

Previous   **Next**

6. In Zoho Sign, create a webhook that when fired will initiate the Workflow in Alchemer.

To configure this initiator you must set up a webhook in Zoho Sign .

1. When composing the new webhook in Zogo Sign, set the Webhook URL to the endpoint supplied by Alchemer.

2. Setup the webhook in Zoho Sign and select the events you want. You can select any or all of the available events.

3. Test the Webhook to make sure sure everything works like you expect.

For more information on creating webhooks in Zoho Sign, refer to their documentation.

7. Click the "Save" button to complete configuration for this initiator.

Merge Codes

When the webhook fires, Zoho Sign will pass the following fields to Alchemer Workflow. After configuring this initiator, you can use these fields in merge codes, logic, and other Workflow features.

For more information on how to use these merge codes in your Workflow, check out this article.

⊕ Fields for Zoho Sign initiator

Use Cases

Here some example Use Cases for the Alchemer Workflow Zoho Sign initiator.

- Initiate a customer onboarding Workflow after a new customer signs final paperwork in Zoho Sign.
- Send feedback surveys to customers at key milestones, after they complete paperwork in Zoho Sign.
- Keep internal teams informed with email or Slack updates if documents sent for approval expire, are reassigned, or are recalled.

FAQs

▷ What permissions do I need within Alchemer to set-up and use the Zoho Sign initiator?

▷ Can multiple Workflows initiate off the same Zoho Sign initiator?

▷ This initiator doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!

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