Alchemer Workflow ZohoSign Integration

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

Alchemer's integration with Zoho Sign allows you to:

- Automate the process of sending documents for signing, after events occur in Alchemer Workflow.

What are some use cases for this integration?

- After a customer completes a survey, automatically send a Zoho Sign template for signing.
- Use logic to only send a Zoho Sign template to customers that provided certain feedback or answers on their survey.

Integration Setup

1. Create a Workflow in Alchemer and select your initiator.

> For more information on building Workflows in Alchemer refer to the following documentation:
> - Getting Started with Alchemer Workflow
> - Building a Workflow

2. When you are ready to add the Zoho Sign step to your Workflow, drag the Zoho Sign step from the Step Library under Connections.

3. Click the pencil icon to configure your Zoho Sign integration step.
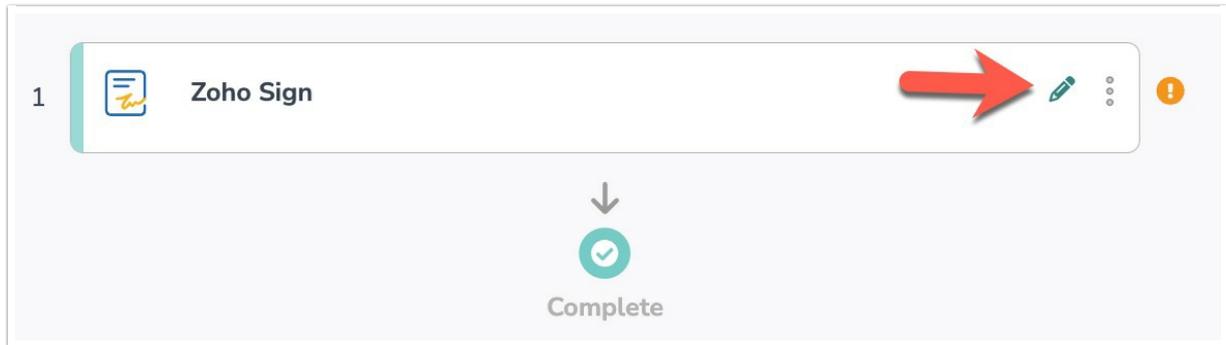
4. Select the integration action you'd like to use.

- **Send template for signing:** Send a Zoho Sign template for signing. Jump to this section for specific guidance on this integration action.
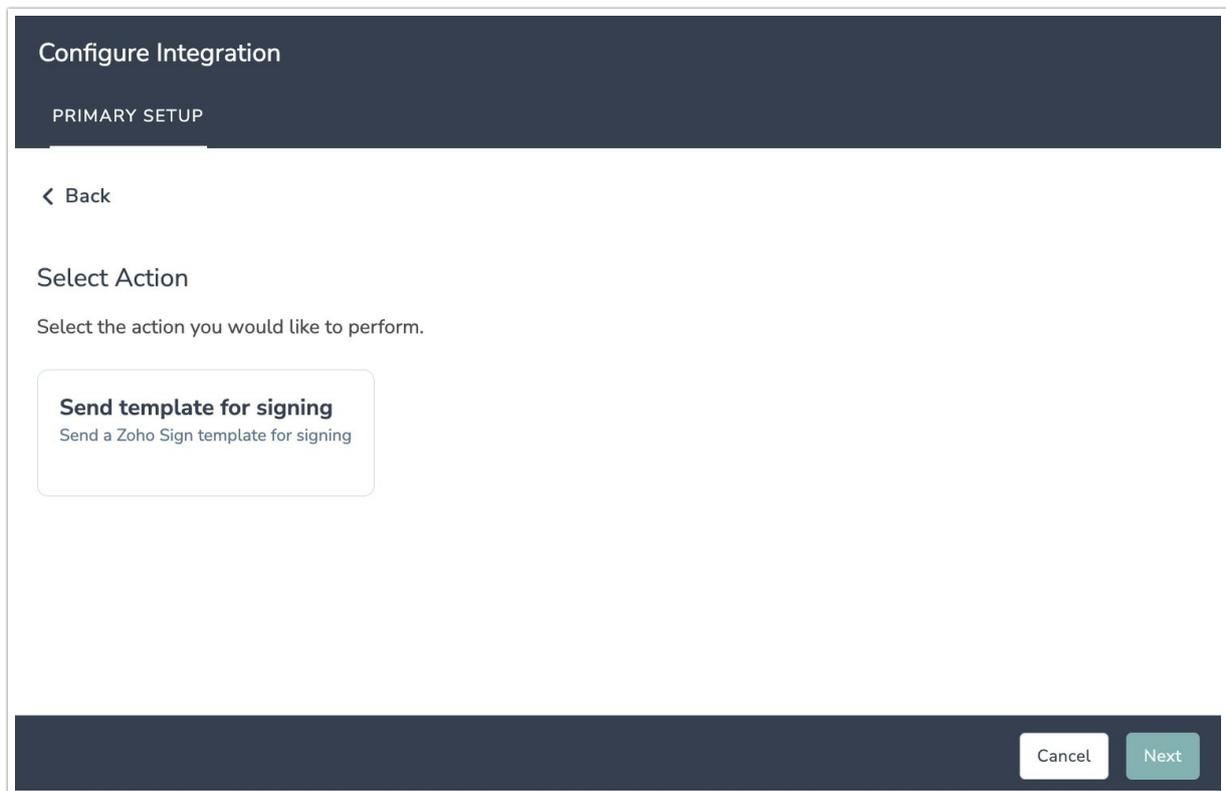
Zoho Sign | Send Template for Signing

To complete setup for this integration action, you will need:
- Your Zoho Sign login
- Templates setup in Zoho Sign
- Fields in this Workflow that will contain the name and email address of the person to send the template for signing

1. Select "Send template for signing" as your integration action.
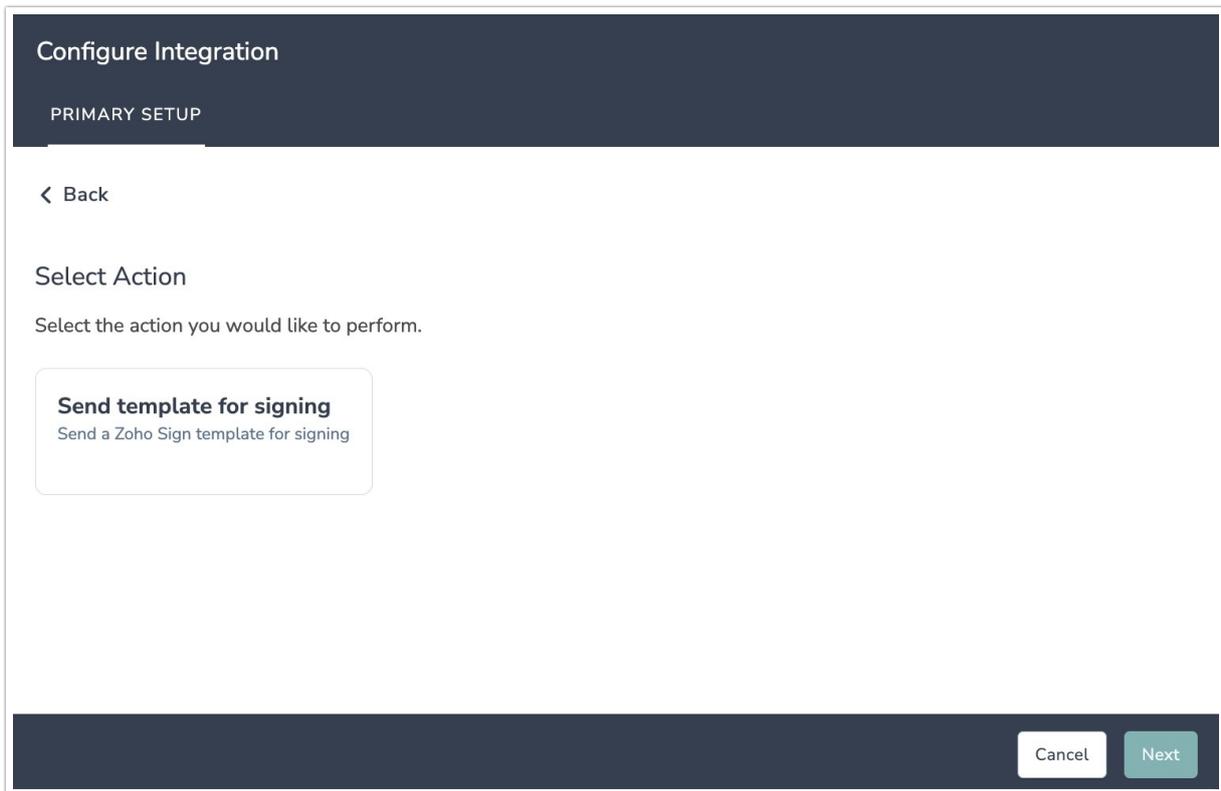
Configure Integration

PRIMARY SETUP

‹ Back

Select Action

Select the action you would like to perform.

Send template for signing
Send a Zoho Sign template for signing

Cancel   Next

2. Click "Next" on the overview screen.
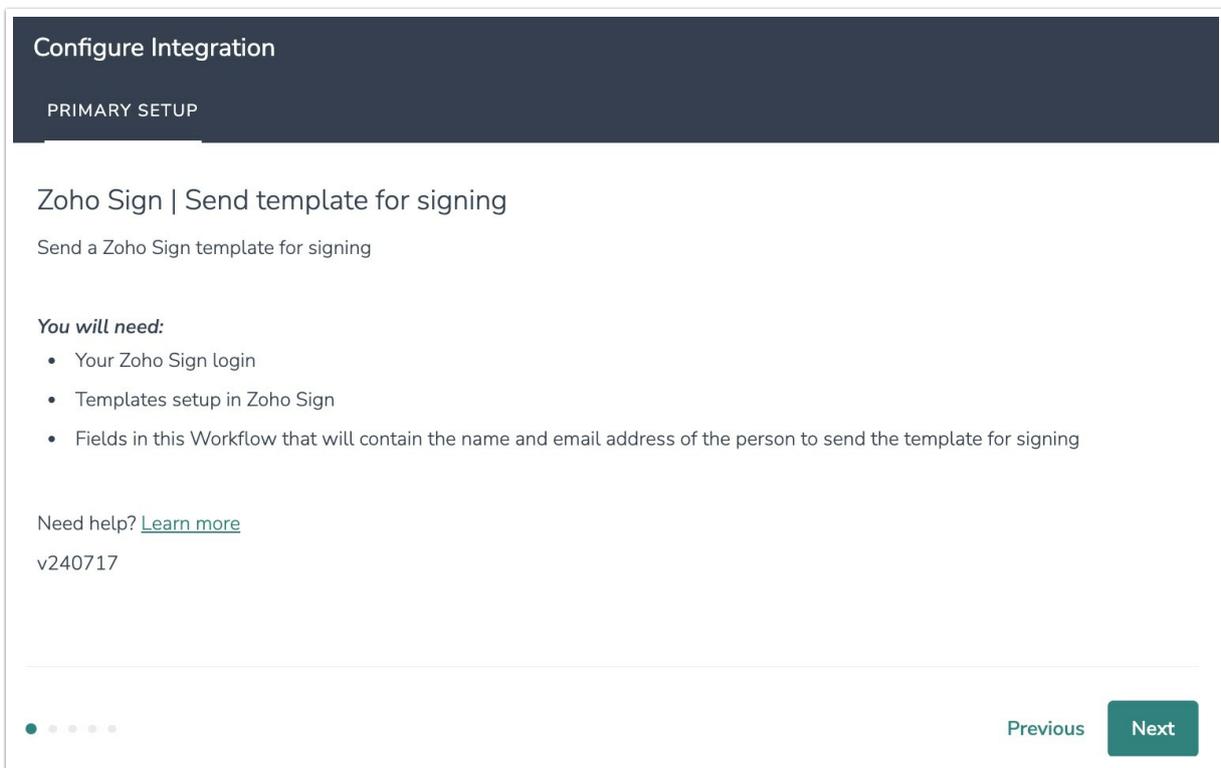
Configure Integration

PRIMARY SETUP

Zoho Sign | Send template for signing

Send a Zoho Sign template for signing

You will need:

- Your Zoho Sign login
- Templates setup in Zoho Sign
- Fields in this Workflow that will contain the name and email address of the person to send the template for signing

Need help? Learn more

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3. Create a new authentication.

Configure Integration

Zoho Sign | Authentication

Connect to your Zoho Sign account

New authentication

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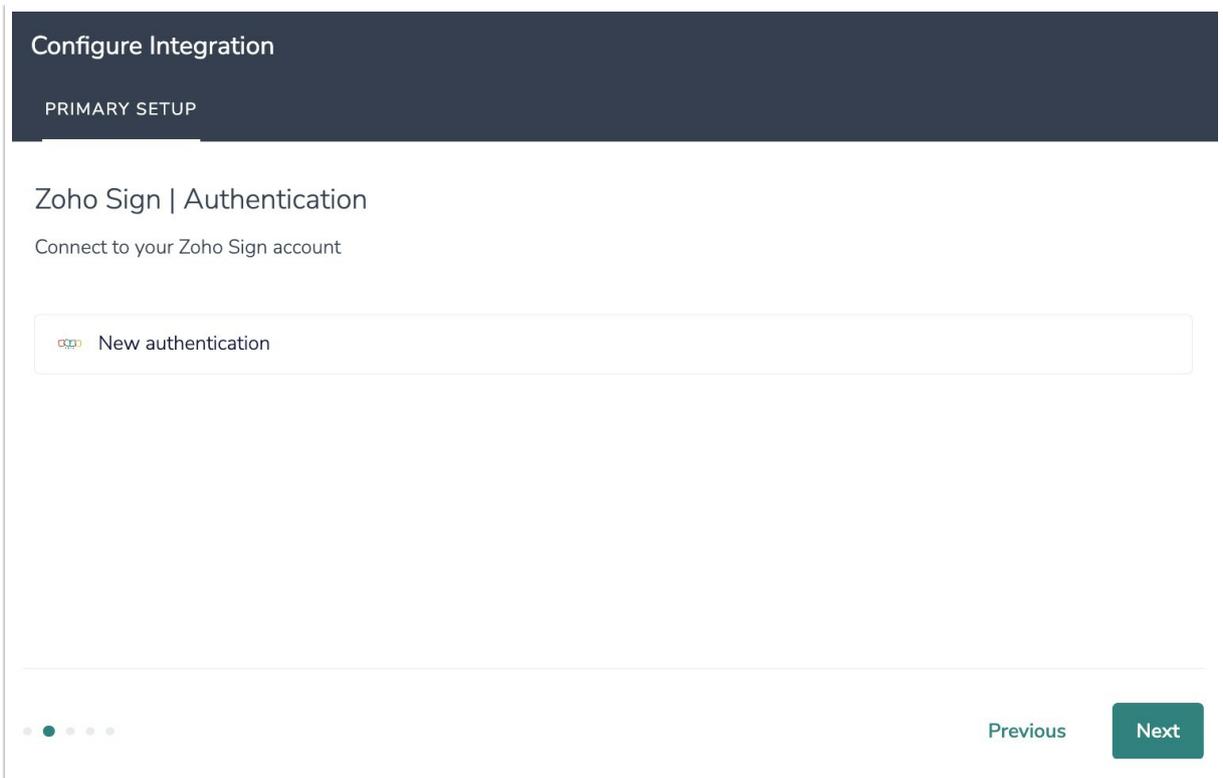
4. Name your authentication then click "Create"

Configure Integration

PRIMARY SETUP

Zoho Sign | Authentication

Connect to y...

New

Create a new authentication   ✕

Your authentication name

Zoho Sign Connector

Previous   Create

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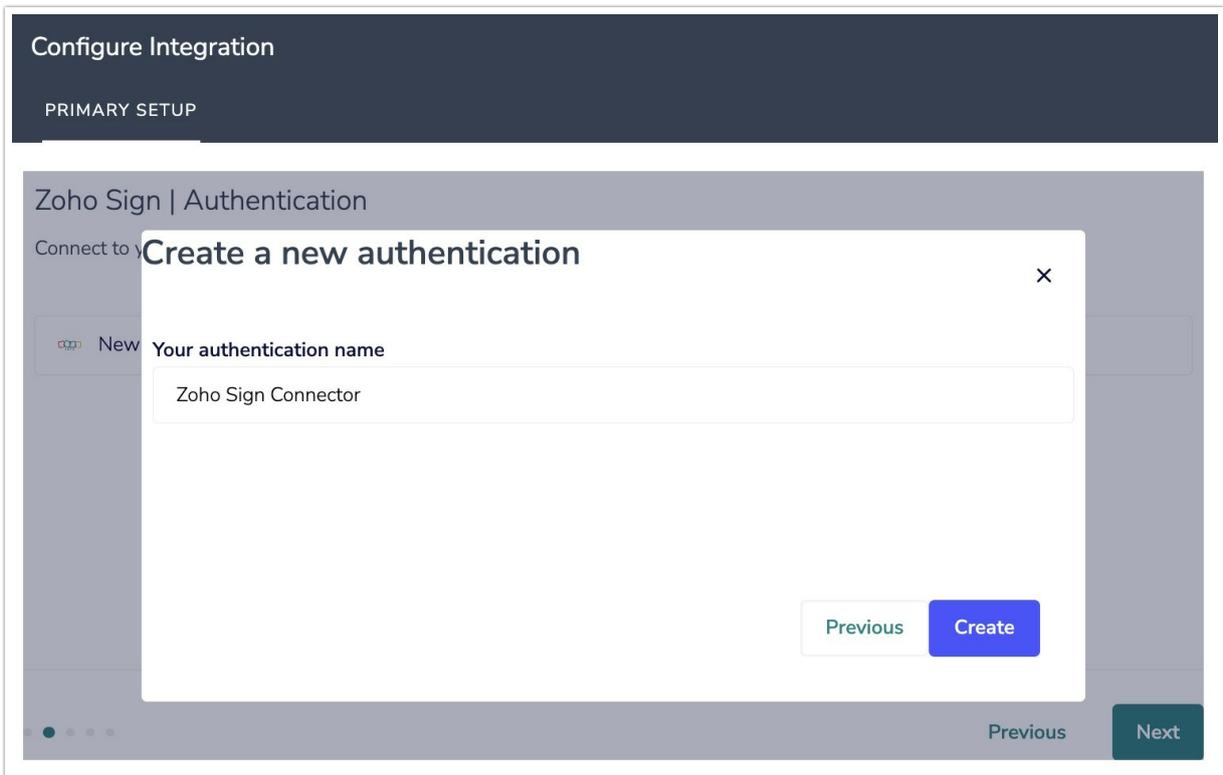
5. In the Zoho sign-in window that appears, provide your credentials.
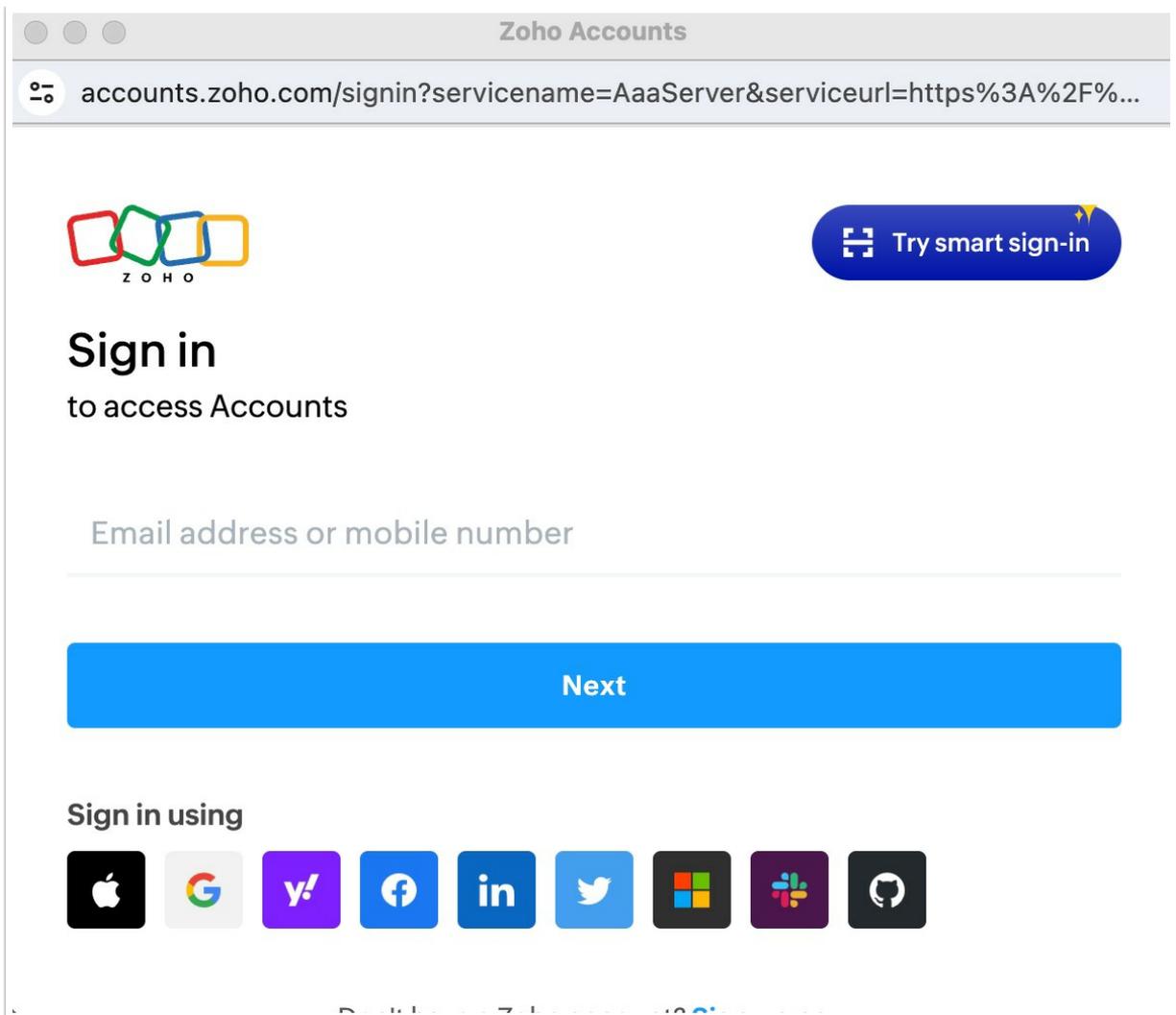
6. After completing login, click "Next" on the Alchemer authentication screen.

Configure Integration

PRIMARY SETUP

Zoho Sign | Authentication

Connect to your Zoho Sign account

Zoho connected
Zoho Sign Connector

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7. Select the Zoho Sign template and action you want to send for signing.

Configure Integration

PRIMARY SETUP

Zoho Sign | Select template

Select the Zoho Sign template and action you want to send for signing.

Select Zoho Sign template *(optional)*

Type to search

Fourth template
Template 5
Template 6
Template 7
This is a sample document
This is a sample document

Previous   Next

8. Select the fields question answers from Alchemer that contain the recipient info and fields.

The template default values are used for when fields are not mapped.

Zoho requires both the recipient name and email to configure an action.

Configure Integration

PRIMARY SETUP

Zoho Sign | Select recipients and fields

Select the fields or question answers from Alchemer that contain the recipient info and fields.

Use this Alchemer field value	for this Zoho Sign field	
Step 0 | Webhook | input1	Zoho Sign | Actions | Signer 1 | recipient_name	🗑
Step 0 | Webhook | input2	Choose an option	🗑

Zoho Sign | Actions | Approver 1 | recipient_email

Zoho Sign | Actions | Approver 1 | recipient_name

Add a new mapping

Zoho Sign | Actions | Signer 1 | recipient_email

Note

- *Both the recipient name and email is required by Zoho for a*
- *The template default values are used is used for when fields are not mapped*

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9. Click "Save" to complete integration setup.

Configure Integration

Zoho Sign | Setup complete

A log of each run result can be found in the Monitor tab

Previous   **Save**

FAQ

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

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

Related Articles