



Zoho Corporation

Z O H O

Adding document fields automatically using text tags (field addition)

Zoho Sign helps users to add corresponding fields automatically to the document with text tags during the document signing process. This helps users send out the document for signature more quickly than manually adding the fields every single time. For example, if you have integrated Zoho Sign with Zoho CRM and would like to automatically add fields to a long and customized sales order with text tags, you can just add these fields directly into the document, thereby automating the entire digital signature collection process.

Popular use-cases:

- Integrating Zoho Sign with other applications like CRM, HRMS, Finance and much more
- Integrating Zoho Sign with in-house apps via API



What is a text tag?

- A text tag is a unique identifier that is associated with a field.
- You can add the respective text tag to add the corresponding field to the document.
- To add a signature field to your document, you can just type `{{Signature}}` or `{{S}}` instead of manually adding the signature field in Zoho Sign.

This will come in handy when you would like to automate your digital signature collection process.

Zoho Sign offers text tags in two formats

- **Longhand tags** that are more descriptive
- **Shorthand tags** that are more brief

Shorthand tags are useful to avoid line breaks and formatting issues while using them in a long document.

Long form	Short form	Definition
<code>{{Signature}}</code>	<code>{{S}}</code>	A signature field added to the first recipient
<code>{{Company:Recipient2}}</code>	<code>{{CO:R2}}</code>	A company field added to the second recipient
<code>{{Textfield:Recipient1*}}</code>	<code>{{TF:R1*}}</code>	A mandatory text field added to first recipient
<code>{{Jobtitle}}</code>	<code>{{JT}}</code>	A job title added to the first recipient
<code>{{Initial}}</code>	<code>{{I}}</code>	An initial field added to the first recipient
<code>{{Signdate}}</code>	<code>{{SD}}</code>	A date field added to the first recipient
<code>{{Checkbox}}</code>	<code>{{[]}}</code>	A checkbox field added to the first recipient
<code>{{Fullname}}</code>	<code>{{N}}</code>	A full name field added to the first recipient
<code>{{Customdate:Recipient1}}</code>	<code>{{D:R1}}</code>	A custom date field added to the first recipient
<code>{{Firstname}}</code>	<code>{{FN}}</code>	A first name field is added to the first recipient
<code>{{Lastname}}</code>	<code>{{LN}}</code>	A last name field is added to the first recipient

{{Attachment}}	{{A}}	An attachment field is added to the first recipient.
{{Stamp}}	{{ST}}	A stamp field is added to the first recipient.
{{Email}}	{{E}}	An email field is added to the first recipient.
{{CBG:Recipient:FieldName[SubFieldName]}}		<p>CBG or Checkboxgroup - To identify the fieldtype name</p> <p>Recipient - For whom we try to assign the field</p> <p>FieldName - Field name of the checkboxgroup</p> <p>SubFieldName - Field name of the individual checkbox present in checkboxgroup.</p>

Tags for choice fields

Radio button	<pre>{{(Radio1):Recipient1:RadioA}} {{(Radio2):Recipient1:RadioA}} {{(Radio3):Recipient1:RadioA}} {{(Radio4):Recipient1:RadioA}}</pre>	Radio button is assigned to Recipient 1. Radio A refers to the Radio button group and Radio 1, Radio 2 are the options. Radio buttons under the same group must be placed on the same page.
Dropdown	<pre>{{(DD:R1:Text(options="option 1, option 2, option 3"))}}</pre>	Dropdown field with 3 options being assigned to recipient 1.
Checkbox group	<pre>{{CBG:Recipient1:checkboxgroup-1[checkbox1]}} {{CBG:Recipient1:checkboxgroup-1[checkbox2]}}</pre>	Two checkboxes will be placed under same the field where Field Name is checkboxgroup-1

You can also edit font related options. To do so:

```
{{<field type>:recipient<n>:<field name in case of text field>*(font="<Font Name>":fontsize="<font_size>":fontcolor="<color_code>")}}
```

For example: `{{Textfield:Recipient1:Address*(font="Roboto";fontsize="24";fontcolor="ff0077")}}`

Zoho Sign supports only those font types that are available in the font formatting list.

General format to automatic field addition: `{{<field type>:Recipient<n>:<field name in case of text field>*}}`

 **Note:**

- If the recipient number is not mentioned in the document, it will be assigned to the first recipient by default.
- You can mark a text fields and checkboxes as mandatory fields using "*".
- You can add text tags for documents **less than 75 pages**.
- You can also increase the width of the field by adding space in between the text tag and braces. Remember that the tags must be in a single line and the spacing must be added only at the end of the text tag and not at the beginning.

For example: `{{S:R1 }}}` or `{{S:R1* }}}`
`{{S }}}` or `{{S* }}}`

 ***You can find the examples of how these tags can be used in the document attached at the end of this help doc.***

Sample document on how the automatic field addition needs to be added:



PARTNER AGREEMENT

This Agreement of Limited Partnership is made effective as of {{D:R1}}, by and between {{N:R1}} and *Zylker, Inc.*

The partnership shall be conducted under the name of *ZYLKER, INC* and shall maintain office at 53, Prospect St, Anaheim, CA, 92806.

The profits and losses of the partnership shall be divided by the partners according to a mutually agreeable schedule and at the end of each calendar year accordingly.

Terms and conditions:

The terms of this agreement shall be for a period of 2 years, unless the partners mutually agree in writing to a shorter period. Should the partnership be terminated by unanimous vote, the assets and cash of the partnership shall be used to pay all creditors, with the remaining amounts to be distributed to the partners according to their proportionate share. This partnership agreement shall be governed by the laws of the state of California. Any disputes arising between the

This is how the document will reflect the tags once uploaded for signature.



PARTNER AGREEMENT

This Agreement of Limited Partnership is made effective as of , by and between and *Zylker, Inc.*

The partnership shall be conducted under the name of *ZYLKER, INC* and shall maintain office at 53, Prospect St, Anaheim, CA, 92806.

The profits and losses of the partnership shall be divided by the partners according to a mutually agreeable schedule and at the end of each calendar year accordingly.

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Zylker, Inc
Representative Signature

Partner Signature

How it works:

1. Add the required tags to the content of your document.
2. Log in to Zoho Sign, then click the **Send for signatures/Sign yourself** button.
3. Upload the document from your computer or any cloud storage service.
4. Configure document settings, add recipients, and click the Continue button.
5. Zoho Sign will automatically add fields where you have added text tags.
6. You can edit the automatically-added fields and also add more fields, if required.
7. Click Send.
8. You can also save this document as a template for future use.