



Automatic field detection

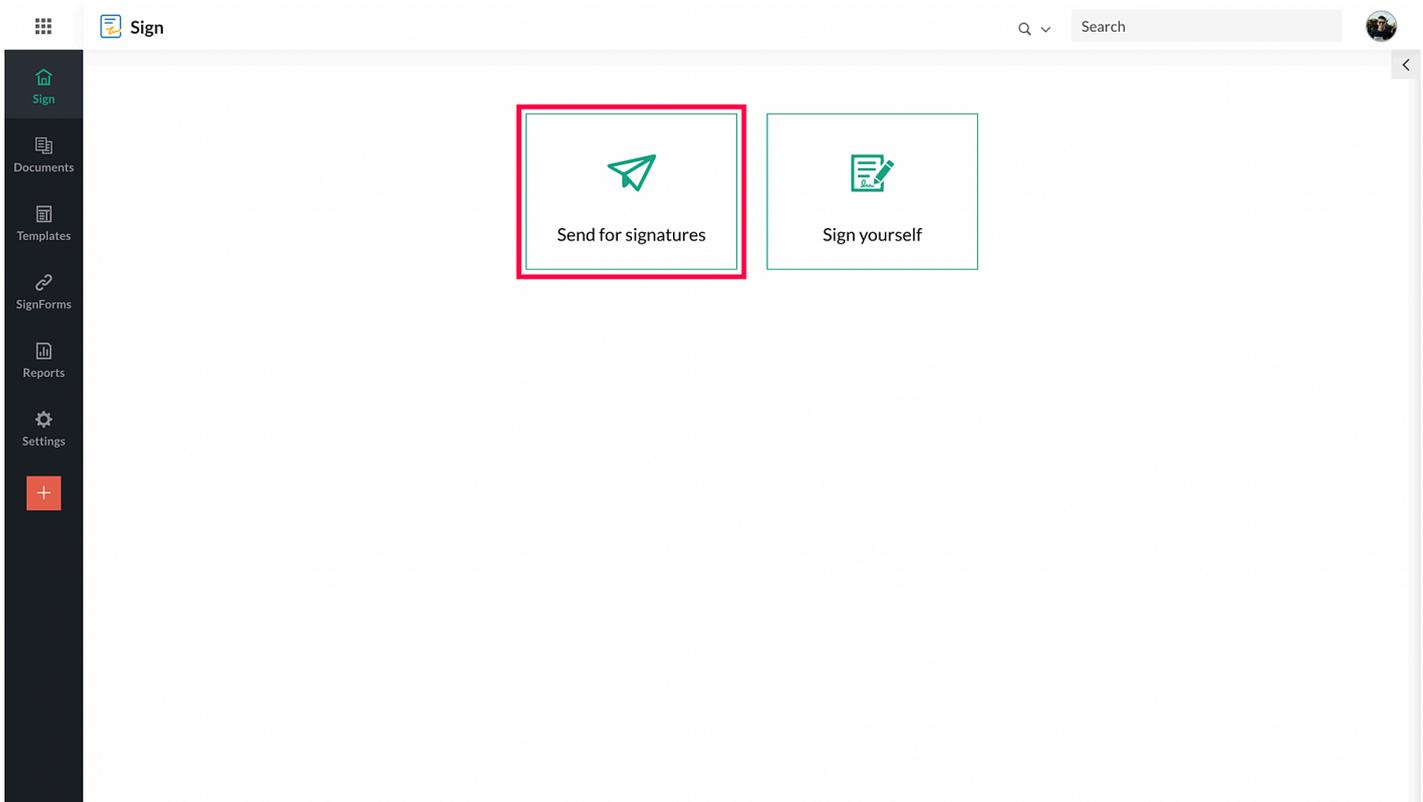
A fillable PDF is an interactive PDF with form fields that can be filled in with information by the reader when opened on compatible applications. When a fillable PDF is uploaded to Zoho Sign, it detects the form fields in the PDF and converts them into Zoho Sign fields. This feature simplifies the field addition process and helps save time, especially for lengthy documents and application forms.

For example, consider a landlord who needs to send a background verification form and lease documents to their prospective tenants. When the documents are in the form of a fillable PDF, it's much easier to use Zoho Sign to send them to the prospective tenants to get their signature. Since Zoho Sign automatically detects the form fields in the PDF and converts them into Zoho Sign fields for the recipients, the landlord doesn't need to add the fields one by one by dragging and dropping from the fields menu into the documents.

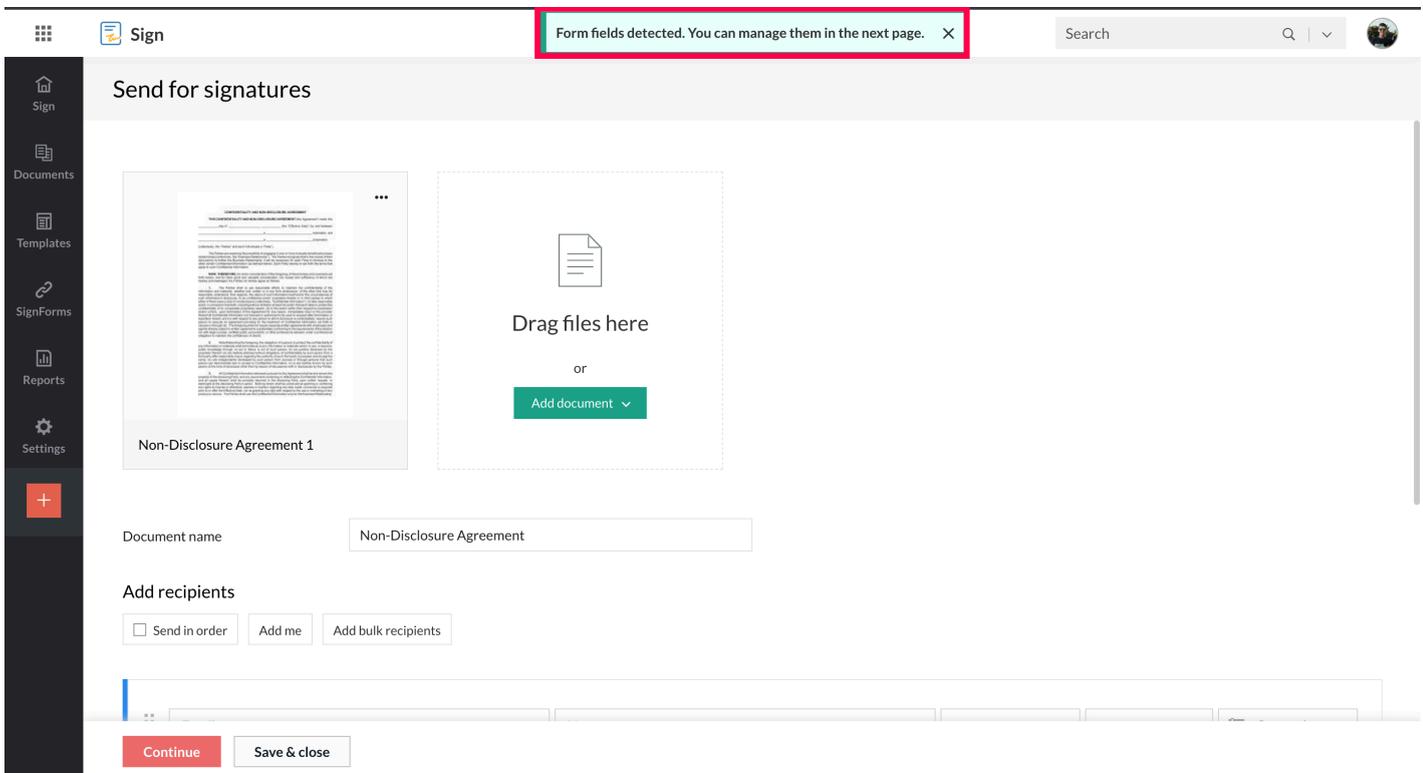
ⓘ Please find a sample fillable PDF attached at the bottom.

How to send a fillable PDF out for signature

1. Log in to Zoho Sign.
2. Select **Send for Signatures** in the home page.



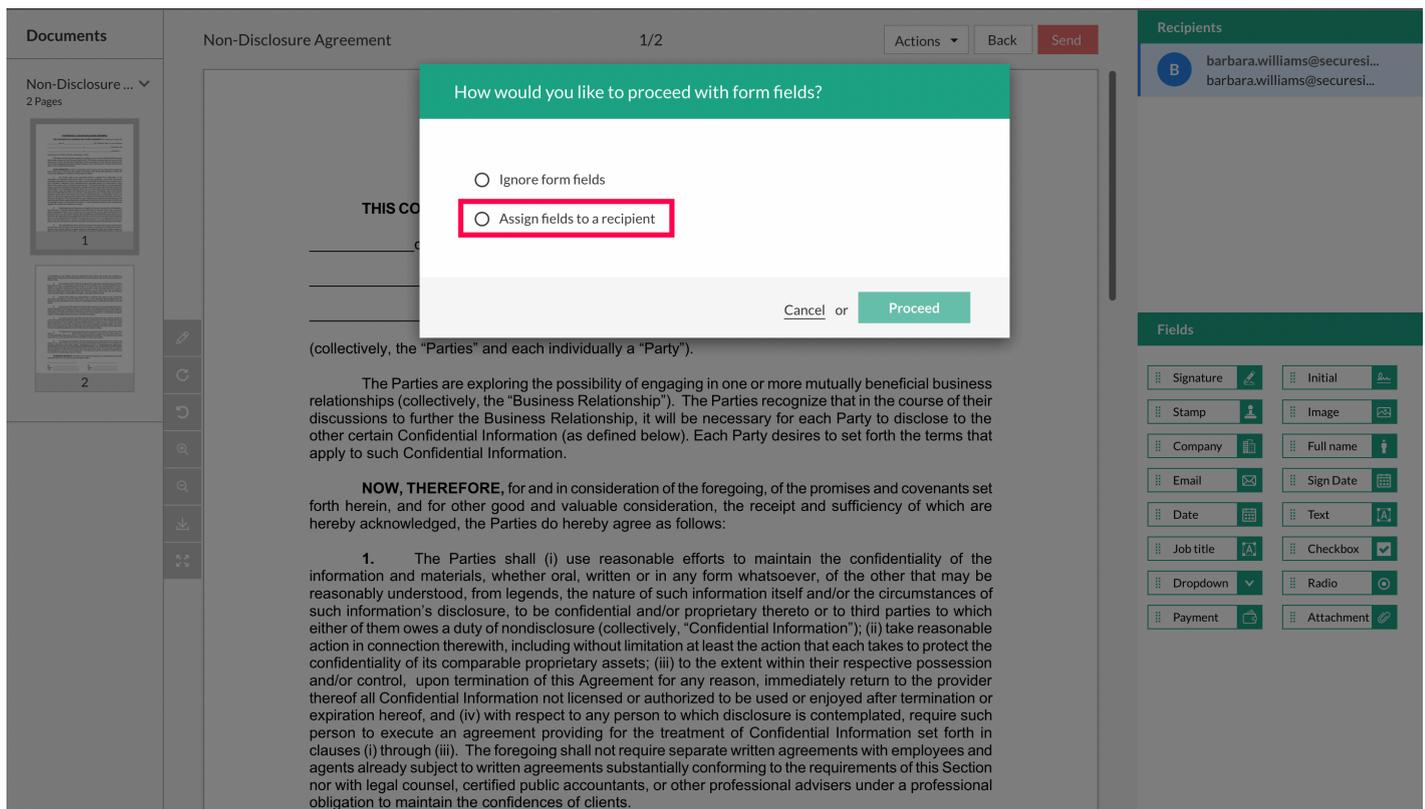
3. Upload the fillable PDF files from your internal storage or import them from cloud. If your fillable PDFs are successfully uploaded, you will see a pop-up on the screen saying, *"Fillable fields detected. You can manage them in the next page."*



4. Add the document name.
5. Add recipient details, such as email address, name, recipient action, and authentication type, then select your preferred recipient language, optionally add a private note to your recipient, and click **Continue** to

proceed to the document viewer. Alternatively, click **Save & Close** if you wish to save the document for later use.

6. Choose **Assign fields to a recipient** in the *How would you like to proceed with form fields?* pop-up.

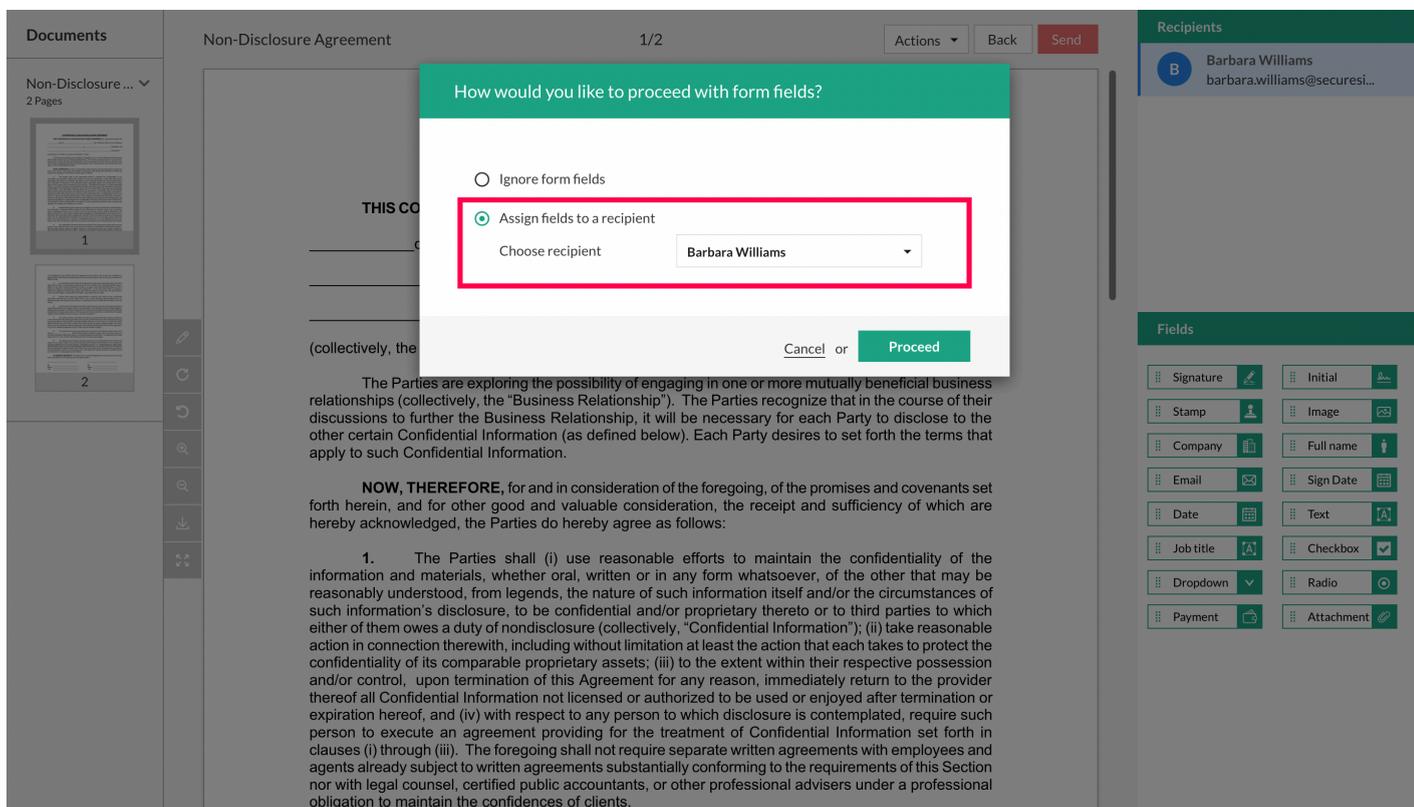


Note:

Selecting **Ignore form fields** will ignore the existing form fields in the PDF and you would need to add fields via drag-and-drop.

Selecting **Assign form fields to a recipient** this will convert the form fields in the PDF into Zoho Sign fields.

7. Choose the recipient to whom you want to assign the form fields to and click **Proceed**.



Note:

Form fields in the PDF will be converted into Zoho Sign fields after assigning fields to a recipient. You can format these fields by clicking on them. You will also be able to change the recipient assigned to a field while formatting it.

8. You can add additional fields via drag-and-drop if you want to.

Note:

Zoho Sign currently doesn't convert radio fields into Zoho Sign fields

9. Click **Send** when your document is ready.

Documents Non-Disclosure Agreement 1/2 Actions Back **Send**

Non-Disclosure ... 2 Pages

CONFIDENTIALITY AND NON-DISCLOSURE AGREEMENT

THIS CONFIDENTIALITY AND NON-DISCLOSURE AGREEMENT (the "Agreement") made this Day [] day of Month [], Year [] (the "Effective Date") by and between Company [] a Corporation [] corporation, and Company 2 [] a Corporation 2 [] corporation, (collectively, the "Parties" and each individually a "Party").

The Parties are exploring the possibility of engaging in one or more mutually beneficial business relationships (collectively, the "Business Relationship"). The Parties recognize that in the course of their discussions to further the Business Relationship, it will be necessary for each Party to disclose to the other certain Confidential Information (as defined below). Each Party desires to set forth the terms that apply to such Confidential Information.

NOW, THEREFORE, for and in consideration of the foregoing, of the promises and covenants set forth herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties do hereby agree as follows:

1. The Parties shall (i) use reasonable efforts to maintain the confidentiality of the information and materials, whether oral, written or in any form whatsoever, of the other that may be reasonably understood, from legends, the nature of such information itself and/or the circumstances of such information's disclosure, to be confidential and/or proprietary thereto or to third parties to which either of them owes a duty of nondisclosure (collectively, "Confidential Information"); (ii) take reasonable action in connection therewith, including without limitation at least the action that each takes to protect the confidentiality of its comparable proprietary assets; (iii) to the extent within their respective possession and/or control, upon termination of this Agreement for any reason, immediately return to the provider thereof all Confidential Information not licensed or authorized to be used or enjoyed after termination or expiration hereof, and (iv) with respect to any person to which disclosure is contemplated, require such person to execute an agreement providing for the treatment of Confidential Information set forth in clauses (i) through (iii). The foregoing shall not require separate written agreements with employees and agents already subject to written agreements substantially conforming to the requirements of this Section nor with legal counsel, certified public accountants, or other professional advisers under a professional obligation to maintain the confidences of clients.

Recipients Barbara Williams barbara.williams@securesi...

Fields

- Signature
- Initial
- Stamp
- Image
- Company
- Full name
- Email
- Sign Date
- Date
- Text
- Job title
- Checkbox
- Dropdown
- Radio
- Payment
- Attachment

10. Verify the number of fields added for each recipient in the confirm details pop-up and click **Confirm**, to send the document to your recipients.

Documents Non-Disclosure Agreement 1/2 Actions Back **Send**

Non-Disclosure ... 2 Pages

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- Signature
- Initial
- Stamp
- Image
- Company
- Full name
- Email
- Sign Date
- Date
- Text
- Job title
- Checkbox
- Dropdown
- Radio
- Payment
- Attachment

Confirm details

Please verify the number of fields added for each recipient and confirm

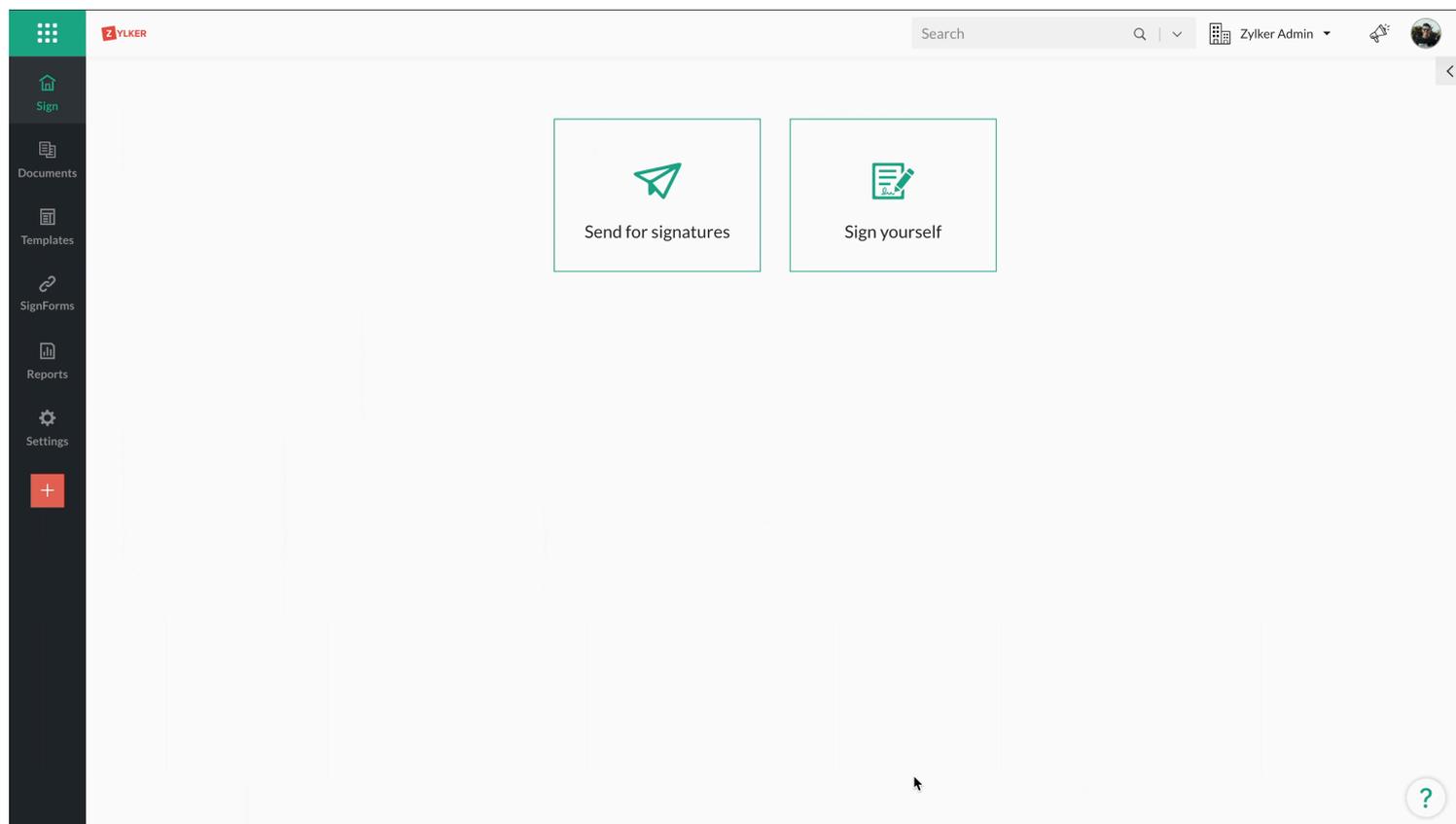
Recipient	Fields
barbara.williams@securesign24x7.com	15

Cancel or **Confirm**

How does AI document fields detection work?

The AI document field detection features help senders save time by automatically scanning your document content, detecting empty space for document fields to be assigned for your recipients, and placing them in your document.

1. In the document fields viewer window, click **Detect fields**.
2. Choose the recipient to assign the fields and select the document.
3. Click **Detect and insert**.
4. Check the field's alignment and data labels, then click **Send** when your document is ready.



- You can only select three documents at a time and detect fields for up to 15 pages per document at a time.
- Currently, we support only text and checkbox fields.