



Custom fields

Available only in Enterprise edition

Zoho Sign now offers senders the ability to create dynamic, reusable fields that are customized to your needs within documents, and define any combination of field properties, such as field type, validation, and formatting, to make document signing more personalized and efficient.

Let's consider an example: You take care of drafting agreements, contracts, and important documents for your organization. Instead of manually placing a signer field on the document with required validation and repeated formatting, you can create a custom field and quickly place them onto the document.

Any user can create a custom field, but only a user with administrative privileges can create, share, and manage custom fields.

Creating a custom field

1. Create an envelope by adding documents, recipient, and additional customizations.
2. Click **Custom fields** from the right pane in the document viewer window.
3. Enter the custom field name, select the field type, validation, and formatting options, if needed.
 - i. Select shared with Organization if you wish other users in your organization to use this custom field.
4. Once all the properties have been set, click **Save**.
5. You can find the list of all custom created fields under **Custom fields**

Documents Sample social media policy 1/2 Detect fields Actions Back Send

Sample social me... 2 Pages

Sample Social Media Policy

This policy provides guidance for employee use of social media, which should be broadly understood for purposes of this policy to include blogs, wikis, micro blogs, message boards, chat rooms, electronic newsletters, online forums, social networking sites, and other sites and services that permit users to share information with others in a contemporaneous manner.

1. Employees need to know and adhere to the company's code of conduct, employee handbook, and other company policies when using their social media account.
2. Employees should be aware of the effect their actions may have on their images, as well as on the company's image. The information that employees post or publish may be public information for a long time.
3. Employees should be aware that company may observe content and information made available by employees through social media.
4. Employees should use their best judgment in posting material that is neither inappropriate nor harmful to the company, its employees, or customers.
5. Although not an exclusive list, some specific examples of prohibited social media conduct include posting commentary, content, or images that are

Recipients

P Prefill by you

B Barbara Zylker
barbarazylker4@gmail.com

Standard fields Custom fields

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

Editing or deleting a custom field

You can edit or delete the custom fields that you have created. To do so,

1. In the document viewer window, click **Custom fields** from the right pane.
2. Select the **pencil icon** next to the desired field to edit/delete it.

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Managing custom fields in bulk

To manage the custom fields in bulk:

1. From your Zoho Sign dashboard, hover on *Settings* and click **Account Settings**.
2. Click **Custom Fields** to view and manage the custom fields.

