Zoho Corporation

Custom fields

Available only in Enterprise edition

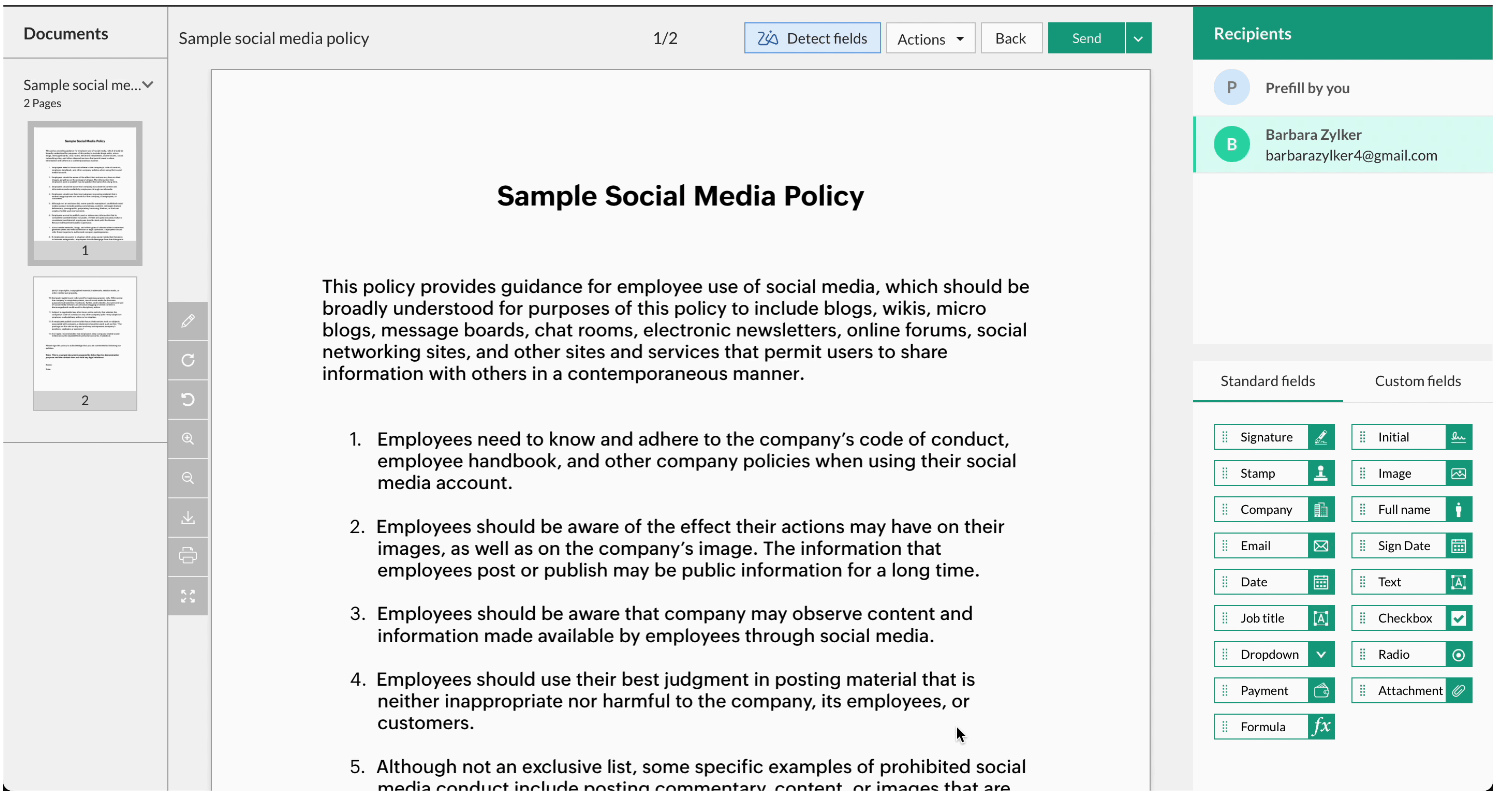
Zoho Sign now offers senders the ability to create dynamic, reusable fields that are customized to your needs within documents, and define any combination of field properties, such as field type, validation, and formatting, to make document signing more personalized and efficient.

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

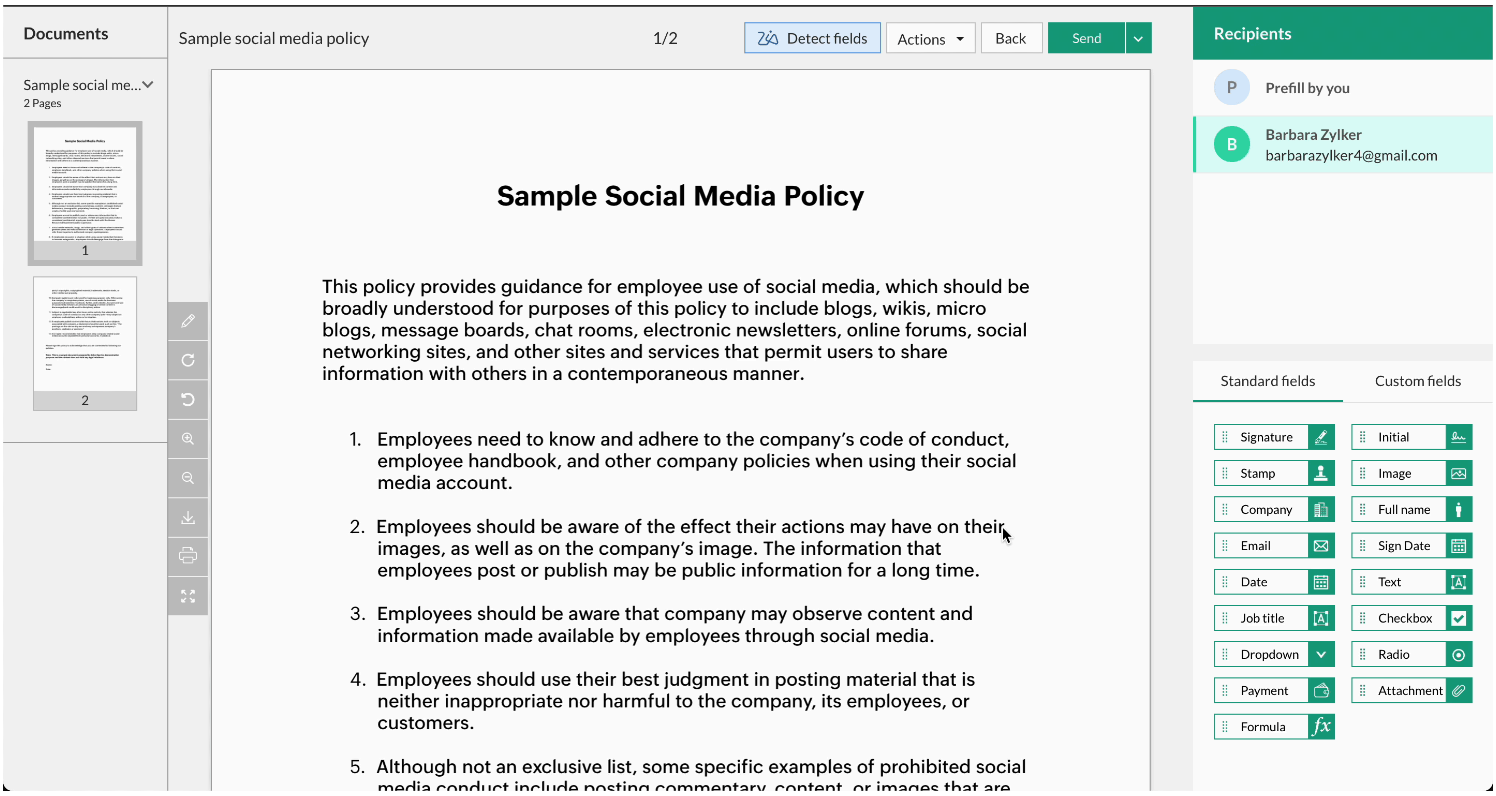
1. Create an envelope by adding documents, recipient, and additional customizations.
2. Click **Custom fields** from the right pane in the document viewer window.
3. Enter the custom field name, select the field type, validation, and formatting options, if needed.
    i. Select shared with Organization 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**



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.



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 Field**s to view and manage the custom fields.