

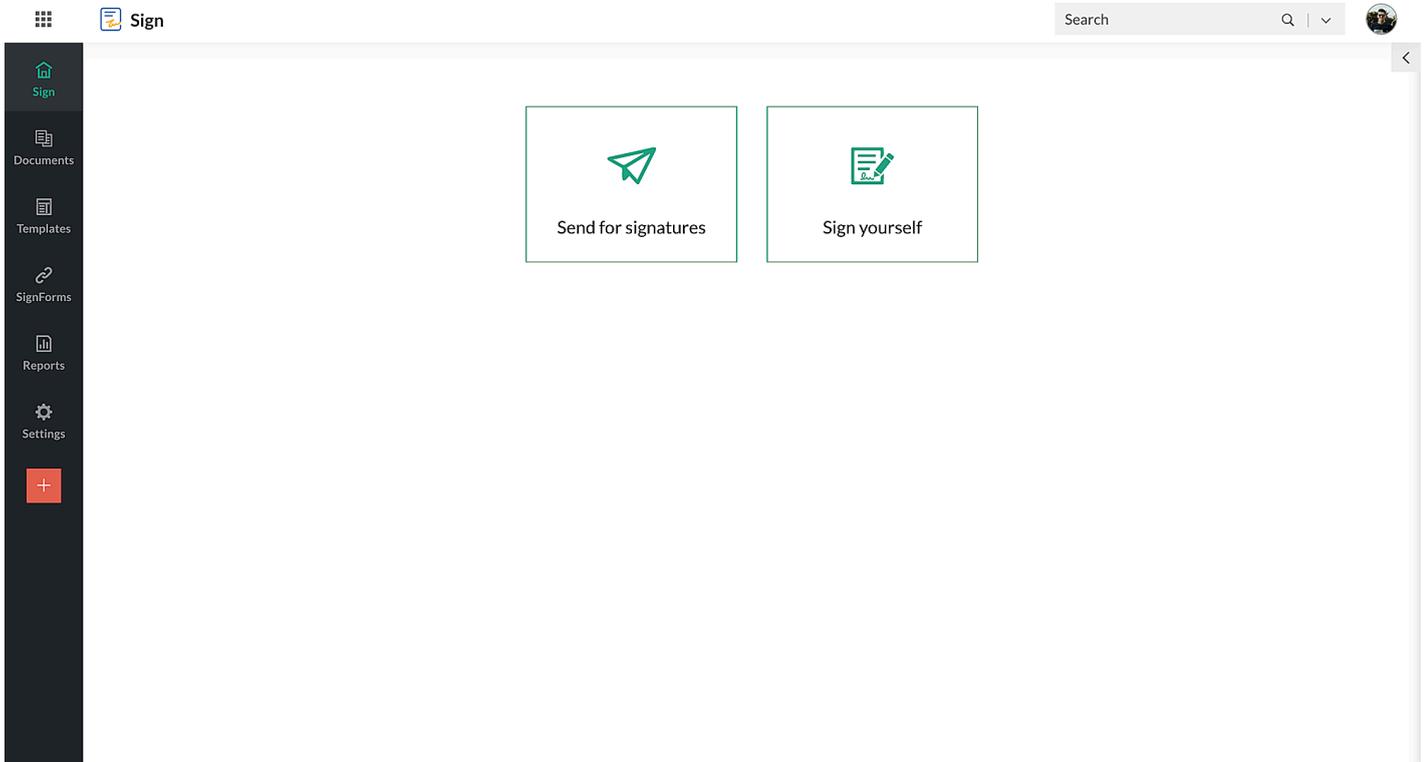


# Support for prefill fields in Send for Signature

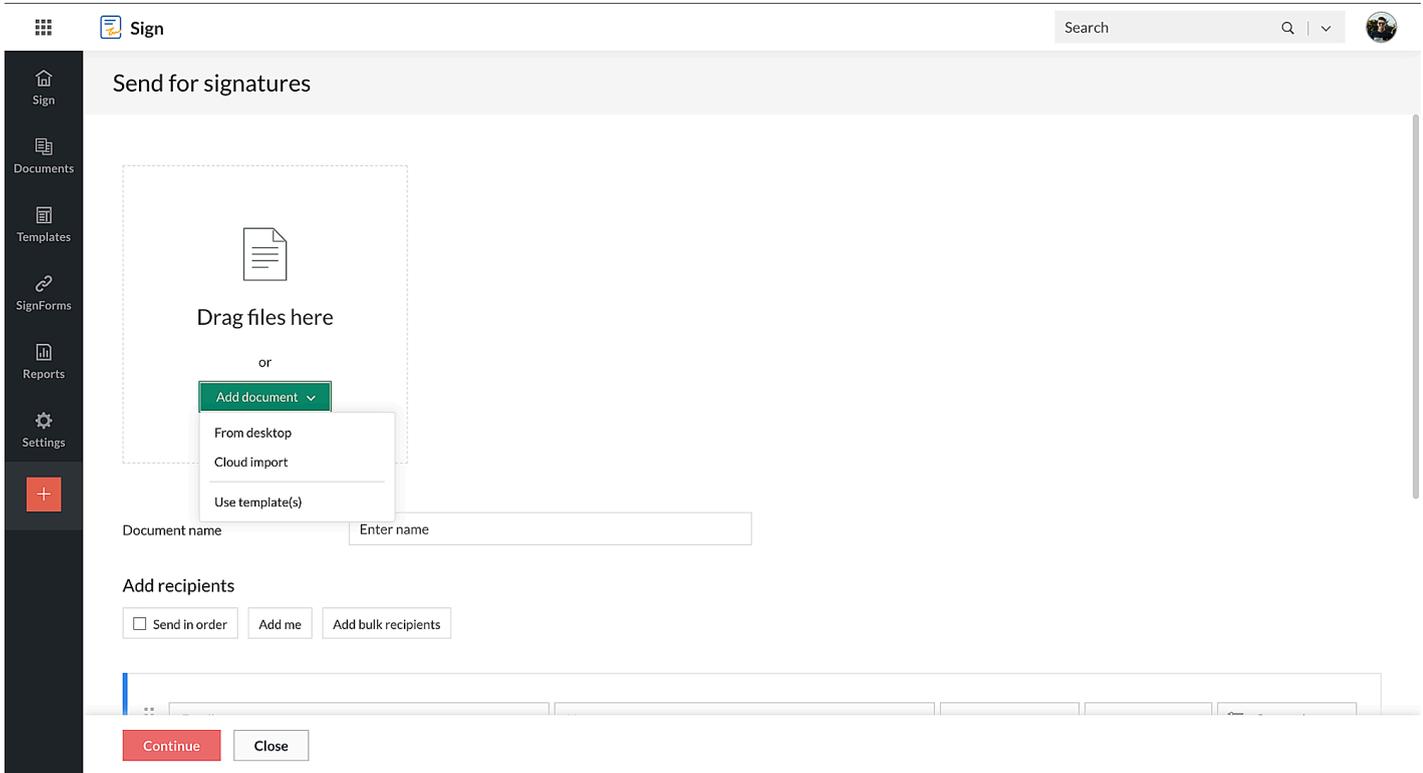
Zoho Sign now supports prefill fields in all documents that you send for signature. Prefill fields can be selected from the document viewer when adding signer fields. Data entered in your prefill fields can be retrieved along with other form data.

## How to add prefill fields to documents when sending them for signature

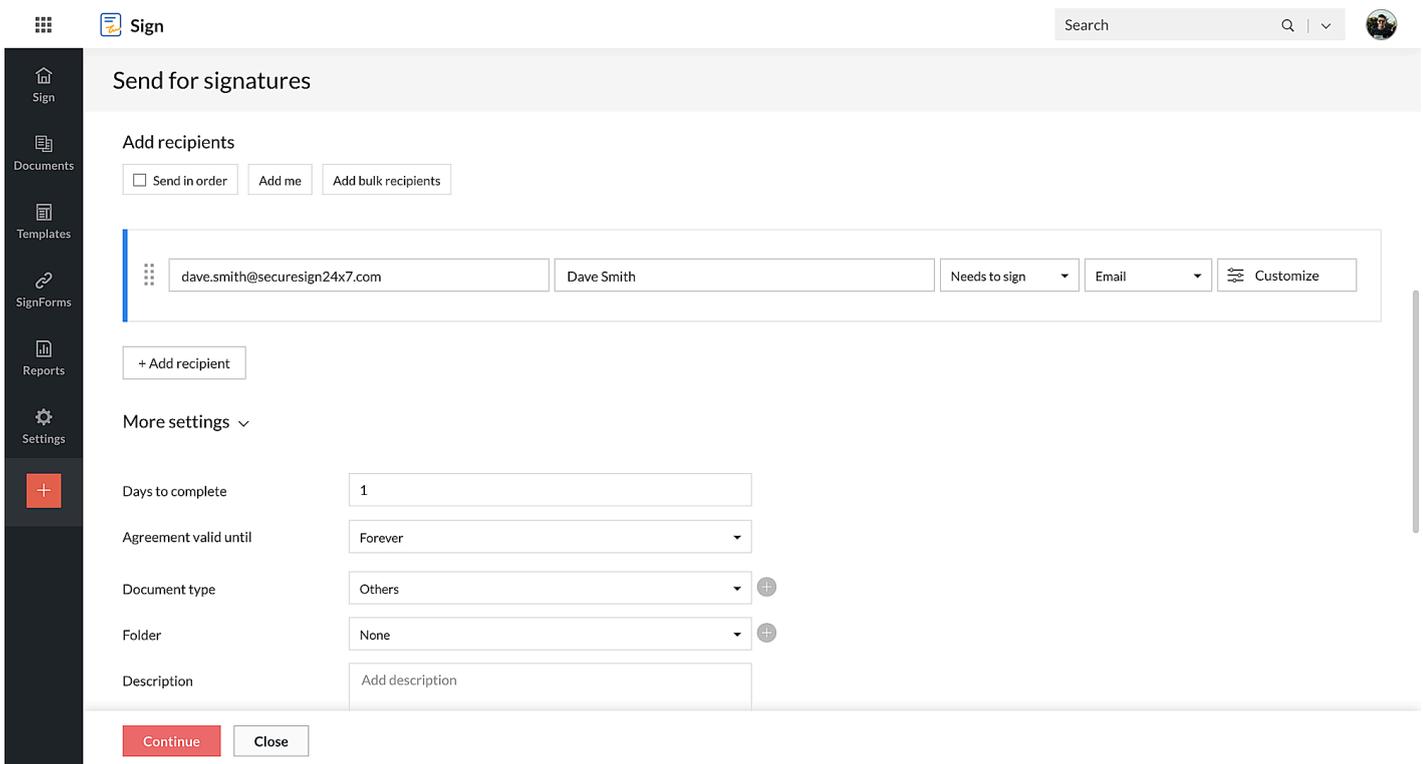
1. Log into Zoho Sign.
2. Select **Send for Signatures**.



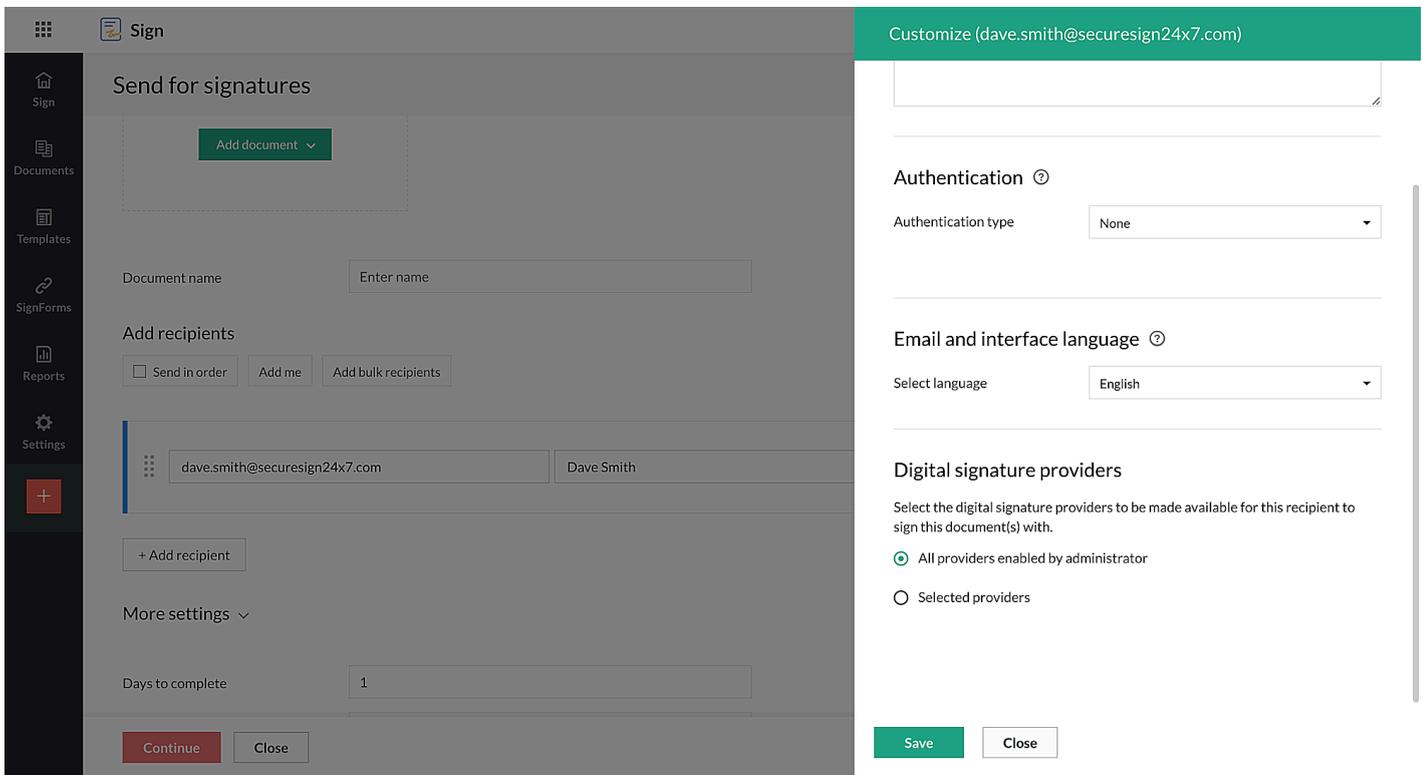
3. Click the **Add Document** dropdown and add the document(s) you wish to send for signatures.



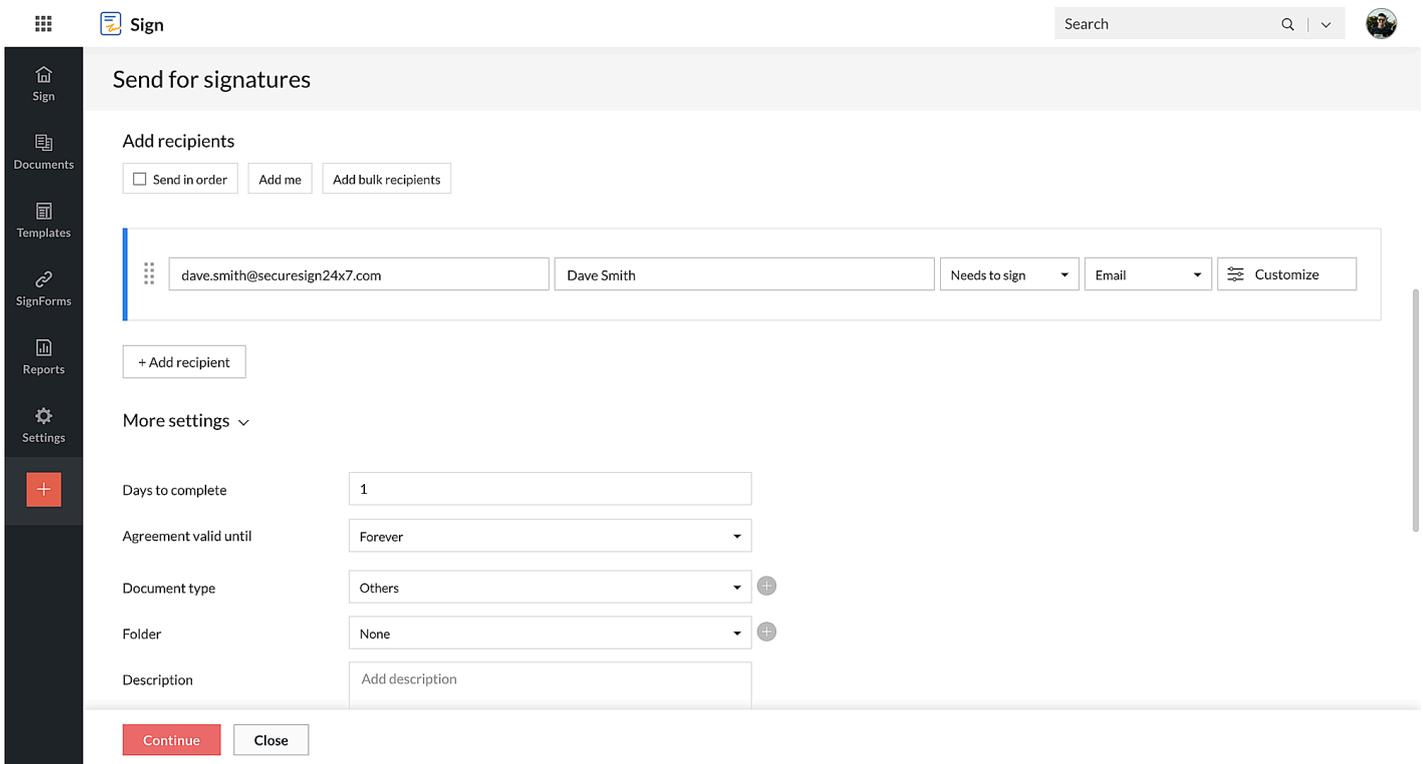
4. Add recipient details, such as name, email address, and role, and select a document delivery mode.



5. Click the **Customize** button to add a private note to each of your recipients, set an authentication type, choose the email and interface language, and select the digital signature providers the recipient may use to sign this document(s).

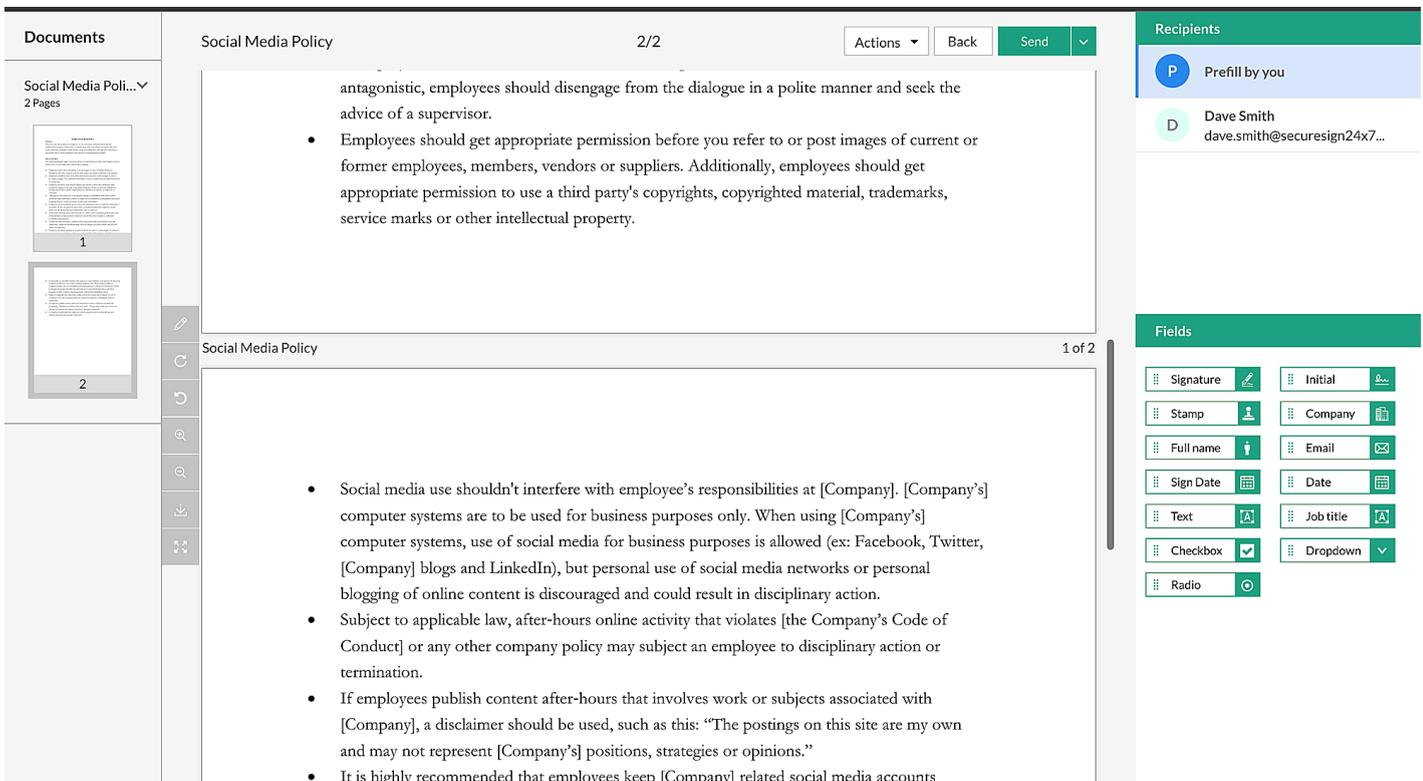


6. Configure additional settings, such as document validity period, agreement validity period, folder type, description, and automatic reminders, and add a common note to all your recipients.



7. Click **Continue** to proceed to the document viewer, or click **Save & Close** if you would like to save the document for later use.

8. Select **Prefill by you** under Recipients and add prefill fields by dragging and dropping them from the *Fields* menu.

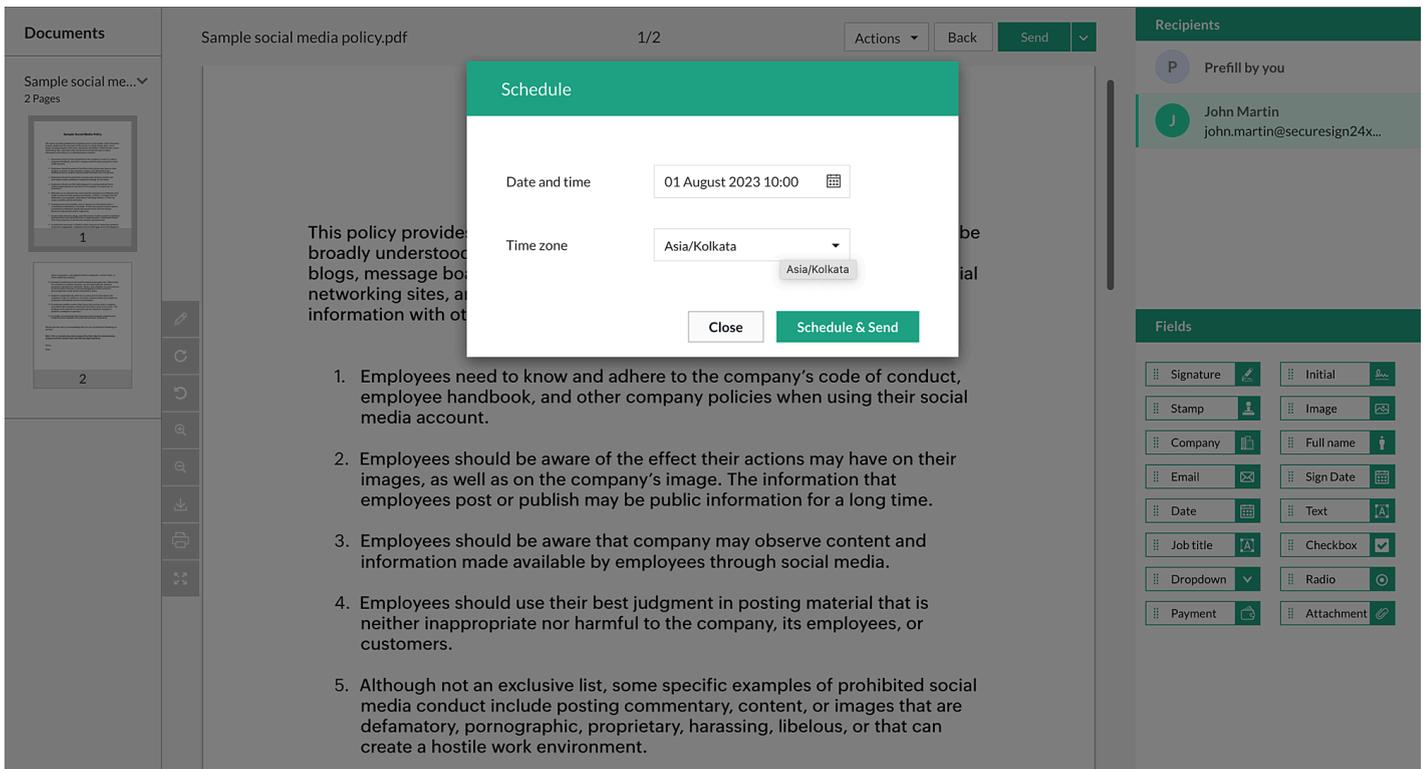


9. Enter the required information in the prefill fields.

10. Add signer fields to the document(s) for all other signers.

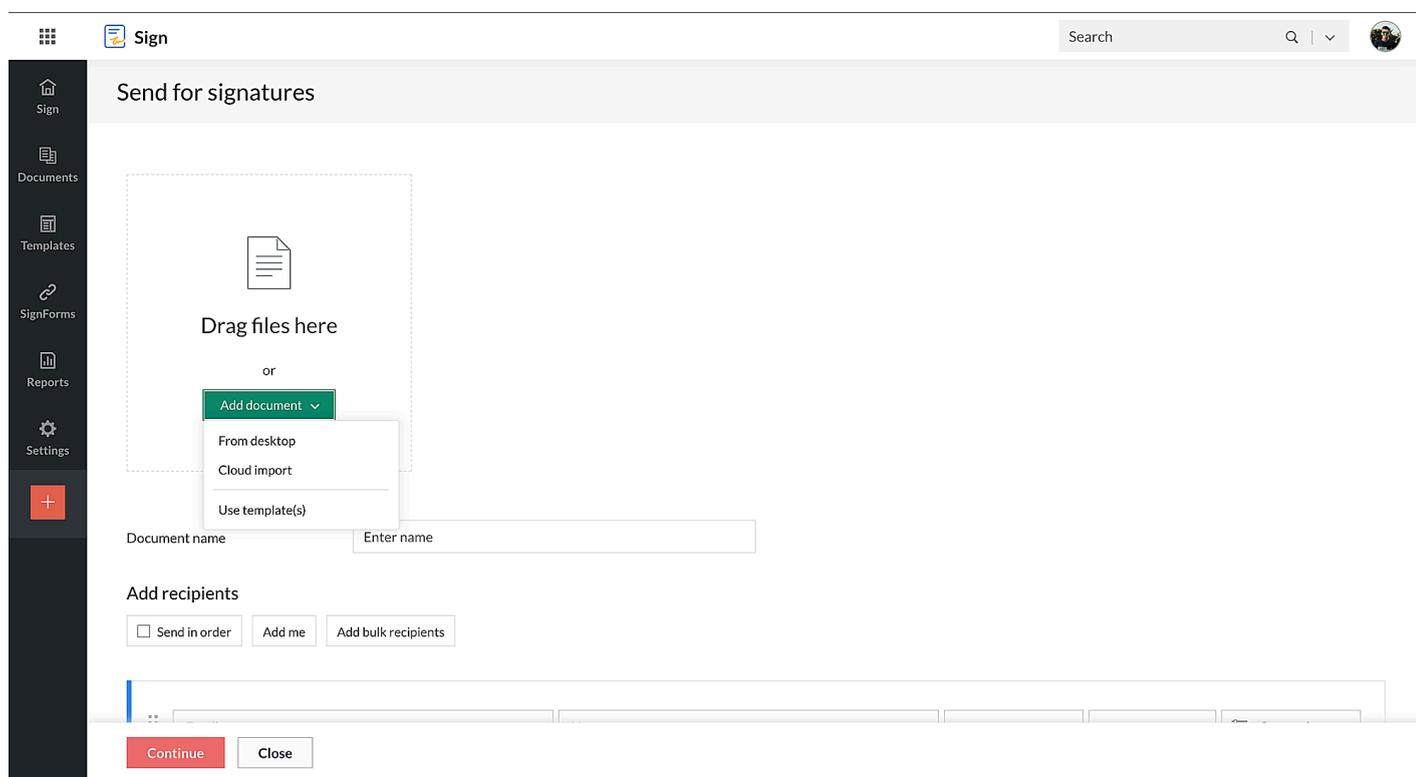
11. Select **Send**, verify the number of fields added for each recipient, and click **Confirm** to send the document(s) right away.

12. Select **Send Later** if you wish to schedule the sending of your document(s). Configure the date, time, and time zone and click **Schedule & Send**.

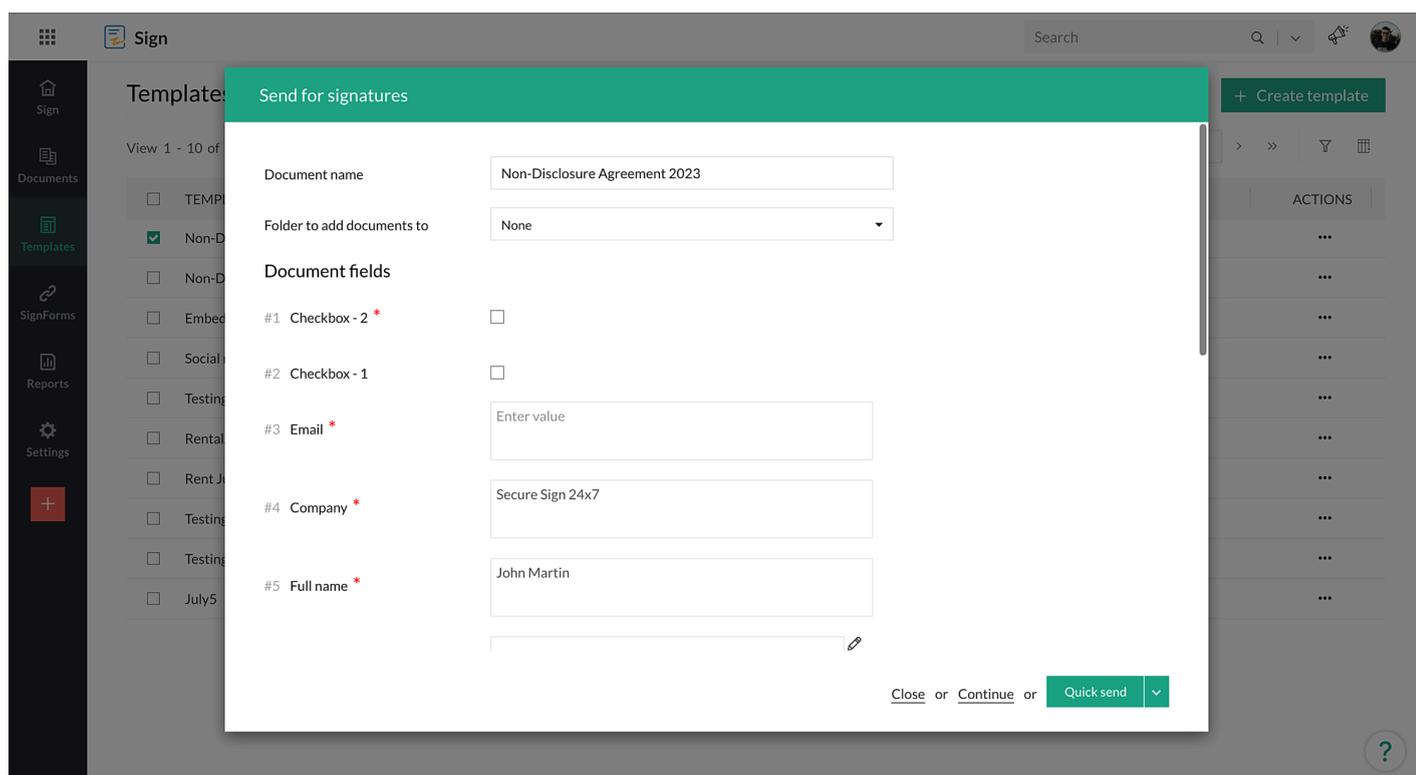


# How to add or format prefill fields when sending templates for signatures

1. Select **Templates** from the left navigation panel.
2. Click on a template to open it, or select a template and choose **Use Template(s)** from the *Actions* dropdown menu.



3. Enter the prefill field values and recipient details and click **Continue**.



4. Edit the document details if needed, and click **Continue** to proceed to the document viewer.
5. Click on the prefill field that you wish to format.

The screenshot displays the Zoho Sign document editor. The document content is as follows:

programs at all times so as not to disturb other people's peace and quiet.

- 4) not to paint the dwelling without first getting Owner(s) written permission.
- 5) to park motor vehicles in the assigned space and to keep that space clean of oil drippings and grease.
- 6) not to repair motor vehicle on the premises (unless it is in an enclosed garage) if such repairs will take longer than a day.
- 7) to allow Owner(s) to inspect the dwelling, work on it, or show it to prospective tenants at any and all reasonable times.
- 8) not to keep any liquid-filled furniture in this dwelling.
- 9) to pay rent by check or money order made out to the Owner(s) (returned checks will have applicable late payment fees).
- 10) to pay for repairs of all damage, they or their guests have caused.
- 11) to pay for any windows broken in the dwelling while they live there.

Violation of any part of this Agreement or nonpayment of rent when due shall be cause for eviction under applicable code sections. The prevailing party (shall/shall not) recover reasonable legal service fees involved.

Tenants hereby acknowledge that they have read this Agreement, understand it, agree to it, and have been given a copy.

Owner: John Martin Tenant: Full name

The right-hand panel, titled 'Name', contains the following settings:

- Recipient:** Prefill by you
- Data label:** Full name
- Format:** Full Name
- Formatting:** Roboto, font size 11, Bold (B), Italic (I), and a color selection dropdown.
- Description:** (Empty text box)

A 'Delete field' button is located at the bottom right of the panel.

6. Edit the field and click **Send** to send the document for signatures.