

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.

(i) 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.

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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."*

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- 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.

Documents	Non-Disclosure Agreement	1/2	Actions - Back Send	Recipients
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	 (collectively, the 'F Collectively, the 'F The Partie relationships (colle discussions to fur other certain Confi apply to such Con Conference of the therein, and for hereby acknowled 1. The information and m reasonably unders such information's either of them owe action in connection confidentiality of it and/or control, up thereof all Confide expiration hereof, a person to execute clauses (i) through agents already sub nor with legal cour obligation to maint 	arries and each individuality a "Party"). s are exploring the possibility of engaging in one or more mut clively, the "Business Relationship"). The Parties recognize her the Business Relationship, it will be necessary for each dential Information (as defined below). Each Party desires to idential Information. IREFORE, for and in consideration of the foregoing, of the pro- or other good and valuable consideration, the receipt and ged, the Parties do hereby agree as follows: e Parties shall (i) use reasonable efforts to maintain the aterials, whether oral, written or in any form whatsoever, or tood, from legends, the nature of such information itself and disclosure, to be confidential and/or proprietary thereto or s a duty of nondisclosure (collectively, "Confidential Information to therewith, including without limitation at least the action that is comparable proprietary assets; (iii) to the extent within the on termination of this Agreement for any reason, immediate nitial Information not licensed or authorized to be used or enj and (iv) with respect to any person to which disclosure is cor a nagreement providing for the treatment of Confidential iii). The foregoing shall not require separate written agreem- ject to written agreements substantially conforming to the req- sel, certified public accountants, or other professional advis ain the confidences of clients.	re mutually beneficial business gnize that in the course of their re ach Party to disclose to the sires to set forth the terms that the promises and covenants set it and sufficiency of which are tain the confidentiality of the ever, of the other that may be elf and/or the circumstances of elo or to third parties to which formation"); (ii) take reasonable on that each takes to protect the in their respective possession hediately return to the provider or enjoyed after termination or b is contemplated, require such dential Information set forth in greements with employees and the requirements of this Section I advisers under a professional	II Signature III Initial Image III Stamp III Image Image Image III Company Image Image Image Image Image III Company Image Image

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 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.



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.

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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.

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- 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.