Adobe Sign

FORM FIELDS

Quick Reference Guide

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1.0 INTRODUCTION

Adobe Sign is an electronic form and signature application. It allows you to send electronic documents to recipients for signature. Additionally, you can take existing documents, make them fillable, and prepare them for electronic signatures.

1.1 About This Guide

This guide covers the different form fields available in Adobe Sign. It will walk you through the editing form fields and creating calculated fields. For information on basic Adobe Sign functionality for senders, see the Adobe Sign Sender Basics Quick Reference Guide.
2.0 MANAGE FORM FIELDS

When you convert a document to a fillable form, you have options for adding fields for text, dates, selections, images, and hyperlinks. Additionally, you can modify the field appearance by changing the font, changing the assign to information, and field type. You can edit your form fields for consistency, data validation, and more. This section covers common edits for form fields and specific edits based on the field type. This section will cover these options.

2.1 Naming Fields

You should give your form fields meaningful names, especially if you plan to use the form fields in calculations. To change the name of a field,

1. Right-click on the field
2. From the menu, click Edit
3. At the top of the screen, click the pencil icon
4. Enter a meaningful name
5. Click OK

2.2 Changing the Assigned To

You can change the form field Assigned To information. To change the Assigned To information,

1. Right-click on the field
2. From the menu, click Edit
3. For the Assigned To, click the down arrow
4. Select the desired recipient

![Web Form Signer]

5. Click OK

### 2.3 Changing Field Types

You can change field types if necessary. To change the Field Type,

1. Right-click on the field
2. From the menu, click Edit

![Edit option]

3. For the Field Type, click the down arrow

![Field Type dropdown]

4. Select the desired Field Type

![Signature Fields]

5. Click OK

### 2.4 Changing Form Field Format

You can change the format of a form field by changing its appearance. The appearance affects the font, font size, alignment, and color. To change the appearance,

1. Right-click on the field
2. From the menu, click Edit

![Edit Field options]
3. For the Appearance, click the down arrow

4. To change the font,
   - Click the down arrow
   - Select the desired font

5. To change the font size,
   - Click the down arrow
   - Select the desired font size

6. To change the alignment, click the desired alignment

7. Click OK

### 2.5 Cloning And Copying Fields

Cloning and copying fields will both duplicate a field. Cloning creates an exact copy of the source field, which is helpful if you want the same information to appear other places in your document. On the other hand, copying a field duplicates the source field but gives the copied field a different name i.e. Copy of Name.

#### 2.5.1 Copying Fields

When copy a field, it produces a new field with all the same attributes except the name. It is best used when you want to save time from having to edit the field to make same changes, such font, font size, etc. To copy a field,

1. Right-click on the desired field
2. From the menu, select **Copy Field**

![Copy Field](image)

3. Drag the new field to the desired location

![Drag to location](image)

4. The new field will have a new name.

![Copy of Name](image)

5. To change the name, click the pencil icon and enter a meaningful name.

![Extension](image)

### 2.5.2 Cloning Fields

Cloning fields allows you to create a duplicate field with the same name. It is best used when you want the values entered or calculated to appear in other places on your document, such as a Total field. To clone a field,

1. Right-click on the desired field

2. From the menu, select **Clone Field**

![Clone Field](image)

3. Drag the new field to the desired location

![Drag to location](image)

4. The new field will have the same name as the field it was copied from. Both the original field and the copied field will show the same values.

![Total](image)

### 2.6 Text Input Fields

Text Input fields allow you to add areas where the recipients can input information, such as their name, address, etc.
2.6.1 Adding Text Input Fields

To add a Text Input field,

1. Select the recipient’s name from the right pane

2. In the right pane, expand the Data Fields

3. Drag and drop the Text Input, to the desired areas, i.e. First Name, Last Name, etc.

2.6.2 Editing Text Input Fields

You can edit Text Input fields to change the assigned to, field type, appearance, and more.

1. Right-click on the desired Text Input field

2. From the menu, select Edit

3. Make your changes and selections. For more information, see the Edit Text Input Menu section.

4. After making your changes, click OK

2.6.3 Edit Text Input Menu

The table below describes each menu item.

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pencil icon</td>
<td>Allows you to edit the name of the Text Input field. This is handy when creating calculated fields.</td>
</tr>
<tr>
<td>Assigned To</td>
<td>Changes which recipient will complete the field</td>
</tr>
<tr>
<td>Field Type</td>
<td>Changes the Text Input field to another field type, such as Date, Signature, or Signature Info</td>
</tr>
<tr>
<td>Field Type</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Value Type</td>
<td>Changes the field to a calculated or entered value</td>
</tr>
<tr>
<td>Required</td>
<td>Means the recipient must complete the field</td>
</tr>
<tr>
<td>Read only</td>
<td>Means the recipient cannot change the field contents</td>
</tr>
<tr>
<td>Mask field date</td>
<td>Hides the information entered</td>
</tr>
<tr>
<td>Multi-line data entry</td>
<td>Allows the recipient to enter multiple lines of information</td>
</tr>
<tr>
<td>Default Value</td>
<td>Sets the initial value of the field</td>
</tr>
<tr>
<td>Tooltip</td>
<td>Text the recipient will see when hovering over the field</td>
</tr>
<tr>
<td>Validation</td>
<td>Controls the type of information the recipient can enter, such as numbers or text only</td>
</tr>
<tr>
<td>Conditions</td>
<td>Allows you to control the information that is visible based on specified criteria</td>
</tr>
<tr>
<td>Appearance</td>
<td>Control the format of the information entered, such as font, font size, and alignment</td>
</tr>
<tr>
<td>Tools</td>
<td>Allows you to copy or clone a field</td>
</tr>
<tr>
<td>Delete Field</td>
<td>Removes the Text Input field</td>
</tr>
</tbody>
</table>

### 2.6.4 Masking Text Input Fields

You can mask fields when you do not want the recipient’s sensitive information, such as social security number, etc., visible to others who may view the document. With masked fields, the information displays as asterisks on the completed PDF.

*Please note:* The actual information is **VISIBLE** when exporting reports, such as CSV files.

To add a masked field,

1. Select the recipient’s name from the right pane

2. In the right pane, expand the Data Fields

3. Drag and drop the Text Input to the desired areas, i.e. First Name, Last Name, etc.

4. Right-click on the desired Text Input field

5. From the menu, select **Edit**
6. Check the Masked field data checkbox

7. (Optional) Select the type of validation (i.e. date, social security number, phone, etc)

8. Click OK to save the field properties

9. Repeat for as many fields as you need to mask

2.7 Date Fields

Date fields allow you to add areas where the recipients can enter dates. The date fields will populate automatically with the date the recipients sign the document.

2.7.1 Adding Date Fields

1. To add a date field,

2. Select the recipient’s name from the right pane

3. In the right pane, expand the Signer Info Fields

4. Drag and drop the Date

2.7.2 Editing Date Fields

You can edit date fields to change the date format and more.

1. Right-click on the Date field

2. From the menu, select Edit
3. From the Edit screen, you can change. Click the down arrow for Date Format.

4. Select a Date Format from the list

5. Click OK

2.8 Signature Fields

You can add signature fields, initials, and signature blocks for each person who needs to sign the document.

2.8.1 Adding Signature Fields

To add signature fields,

1. Select the recipient’s name from the right pane

2. In the right pane, expand the Signature Fields

3. Drag and drop the Signature to the desired location on your document

2.8.2 Adding Signature Blocks

A signature block contains areas for the form signer to sign and to enter their name and email address. The signature date is populated automatically, when they sign. To add a signature block,
1. Select the recipient’s name from the right pane

2. In the right pane, expand the Signature Fields

3. Drag and drop the Signature Block to the desired location on your document

2.9 Selection Fields

You can add Selection fields allow your recipients to choose among options that you specify. You have a choice of three selection fields: check box, radio buttons, and drop down. The table below describes their function and best use.

<table>
<thead>
<tr>
<th>Selection Field</th>
<th>Description</th>
<th>Best Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Box</td>
<td>Allows the recipient to select one or more options that apply</td>
<td>When the recipient can select multiple options</td>
</tr>
<tr>
<td>Radio buttons</td>
<td>Allows the recipient to select one option from two or more options</td>
<td>When the recipient can only choose one of the available options</td>
</tr>
<tr>
<td>Drop Down</td>
<td>Allows the recipient to select from a list of options</td>
<td>When the recipient has many options from which to choose</td>
</tr>
</tbody>
</table>

2.9.1 Adding Check Boxes

Check boxes allow the recipient to select one or more options that apply. To add a Check Box,

1. Select the recipient’s name from the right pane

2. In the right pane, expand the Data Fields

3. Drag and drop the Check Box, to the desired area

<table>
<thead>
<tr>
<th>Payment Methods:</th>
<th>Credit Card</th>
<th>Direct Pay</th>
<th>Advance</th>
</tr>
</thead>
</table>
4. Repeat the above step for each check box option.

2.9.2 Adding Radio Buttons

Radio Buttons allow the recipient to select one option from two or more options. To add Radio Buttons,

1. Select the recipient’s name from the right pane

2. In the right pane, expand the Data Fields

3. Drag and drop the Radio Button, to the desired area

4. On the Radio Button Group screen,
   - Specify the number of options for your radio button group
   - Click OK

5. Adobe Sign will place the additional radio buttons on your document.
   - Drag the radio buttons to the desired areas on the document

2.9.3 Adding Drop Downs

6. Drop down menus allow the recipient to select from a list of options. To add a Drop Down,

1. Select the recipient’s name from the right pane
2. In the right pane, expand the Data Fields

3. Drag and drop the Drop Down, to the desired area

4. To add the options for the Drop Down, double-click the drop down

5. In the Drop Down Options of the pop-up menu,
   - Type over the entries with your options
   - To add more options, enter your options in the blank area

6. (Optional) Add a default value for your drop down.
   (A default value allows you to specify a value that stays populated on your document, until the recipient changes it value by making a different selection from the drop down.)

7. Click OK

2.10 Hyperlinks, Images, and File Attachments
This section covers adding hyperlinks, images, and file attachments to your documents.

2.10.1 Adding Hyperlinks
Hyperlink fields are a great way to link from your document to a website or other location. You can use it to link to instructions for completing the document, to policies associated with the document, etc. To add a Hyperlink field,

1. Select the recipient’s name from the right pane
2. In the right pane, expand the More Fields

3. Drag and drop the Hyperlink field, , to the desired area

8. Double-click the Hyperlink field

9. On the Hyperlink menu,
   - In the Website, enter the URL for the desired website
   - In the Display Label, enter a label for the website

   • Click OK

2.10.2 Adding Images

Image fields allows a recipient to attach an image, such as a student id, certificate of completion, etc. You can export the attached image for later use. To add an Image field,

1. Select the recipient’s name from the right pane

2. In the right pane, expand the Data Fields

3. Drag and drop the Image field, , to the desired area

4. Resize the image field as necessary

5. Double-click the Image field

6. In the Display Label, enter a label for the Image field
7. Click **OK**

### 2.10.3 Adding File Attachment fields

While Image fields allow you to attach an image to a document, File Attachment allows the recipient to attach a file, such as a certificate of completion, receipts, or other supporting documentation. To add a File Attachment field,

1. Select the recipient’s name from the right pane

![Recipient Name](image)

2. In the right pane, expand the More Fields

![More Fields](image)

3. Drag and drop the File Attachment field, ![File Attachment](image), to the desired area on your document

![File Attachment Icon](image)

8. Double-click the File Attachment field

9. On the menu,
   - In the Display Label, enter a label for the file attachment field

![Display Label](image)

   - Click **OK**

### 2.11 Aligning And Sizing Fields

The Alignment bar, shown below, allows you to ensure that your form fields are aligned and sized properly. This bar is activated once you select two or more fields.

![Alignment Bar](image)

To align and size fields,

1. Click on a form field in your document

2. While holding down the Shift key on your keyboard, click additional form fields

3. With the fields selected, click the desired alignment and spacing icon

   *For descriptions of each alignment and spacing icon, see the next section.*
### 2.11.1 Alignment and Sizing Options

The table below shows the different alignment and spacing icon, their names, and descriptions.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Menu Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Align Top</td>
<td>Aligns the top of the fields</td>
</tr>
<tr>
<td></td>
<td>Align Middle</td>
<td>Aligns the center of the fields</td>
</tr>
<tr>
<td></td>
<td>Align Bottom</td>
<td>Aligns the bottom of the fields</td>
</tr>
<tr>
<td></td>
<td>Align Left</td>
<td>Aligns the fields to the left</td>
</tr>
<tr>
<td></td>
<td>Align Center</td>
<td>Aligns to the fields to the center</td>
</tr>
<tr>
<td></td>
<td>Align Right</td>
<td>Aligns the fields to the right</td>
</tr>
<tr>
<td></td>
<td>Match Width</td>
<td>Resizes field to the same width</td>
</tr>
<tr>
<td></td>
<td>Match Height</td>
<td>Resizes field to the same height</td>
</tr>
<tr>
<td></td>
<td>Match Both Width and Height</td>
<td>Resizes fields to the same width and height</td>
</tr>
</tbody>
</table>

### 3.0 CALCULATED FIELDS

With Adobe Sign, you can add form fields that contain formulas. The formulas can contain addition, subtraction, division, multiplication, and more. Before you add your calculated fields, you should prepare the fields. This section covers preparing your form fields and adding calculated fields.

#### 3.1 Preparing Fields for Calculations

Before you use your form fields in calculations, it is recommended that you format the fields in a specific manner for best results.

1. Give the form fields meaningful names (See the Naming Fields section for instructions).
   
   *Using meaningful names makes it easier for you to identify the right form fields for your formulas.*

2. Edit the format of the form fields
   
   *If you will use the form fields for calculations, then format them as numbers. If you are using the form fields for comparisons, you can format them as text or numbers depending on your needs.*

#### 3.2 Adding Calculated fields

Before you add calculated fields, be sure that the fields you will use in your formula are setup properly. See the section Preparing Fields for Calculations.

1. In the right pane, expand Data Fields

2. Drag Text Input field
3. Right-click on field
4. Click Edit
5. Click pencil to edit name

6. For Value Type, change to **Calculated value**

7. Click the f(x)

8. Click Fields to expand it

9. Your fields will show in the right pane.

10. To complete your formula,

    1. Select a field from the right pane
    2. Select an operator from the menu

        ![Operator Icons]

    3. Select another field if appropriate
    4. Your formula will appear in the formula section as you make your selections.

        ![Formula Example]

    5. When satisfied, click Check Syntax
    6. Click OK

11. For the Display As, select Number

12. For the Number Format, select a format

13. For the Appearance, select the right justified
3.3 Formula Operators

The table below shows each formula operator and provides a description of its function. (Source: Adobe Sign Supported Operators)

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>+</td>
<td>Add two numbers together.</td>
</tr>
<tr>
<td>-</td>
<td>Subtracts two numbers.</td>
</tr>
<tr>
<td>/</td>
<td>Divides two numbers.</td>
</tr>
<tr>
<td>*</td>
<td>Multiplies two numbers together.</td>
</tr>
<tr>
<td>&amp;</td>
<td>Concatenate two strings together.</td>
</tr>
<tr>
<td>=</td>
<td>Compares two values and returns true if the two values are equal and false if they are not.</td>
</tr>
<tr>
<td>!=</td>
<td>Compares two values and returns true if the two values are not equal and false if they are.</td>
</tr>
<tr>
<td>&lt;</td>
<td>Compares two values and returns Boolean (true or false) if the first value is less than the second value.</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Compares two values and returns Boolean (true or false) if the first value is greater than or equal to the second value.</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Compares two values and returns Boolean (true or false) if the first value is less than or equal to the second value.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Compares two values and returns Boolean (true or false) if the first value is greater than the second value.</td>
</tr>
<tr>
<td>%</td>
<td>Returns the remainder of the division between two numbers.</td>
</tr>
<tr>
<td>^</td>
<td>Returns the exponential value of the specified numbers.</td>
</tr>
</tbody>
</table>
4.0 GETTING HELP

If you are unsure or need assistance, please consider the preferred sources and order in which to contact listed below:

- **Web Resources**
  Adobe Sign Resources

- **Service Center**
  661-654-4357
  servicecenter@csub.edu