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Overview

Adobe Sign text tags can be used in conjunction with Acrobat form fields to define the specific properties of a field. While text tags are added directly to a document in line with the content, PDF tags are used to name the fields, defining the rules and validations of the physically placed field. Acrobat form fields combine the ease of use of the drag-and-drop authoring environment with the versatility of the text tags.

When a document is uploaded to the Adobe Sign Document Library or send out for signature, the Acrobat form fields are processed by the system and converted into Adobe Sign form fields. The system specifically looks at the name the field is given, verifies that an Adobe Sign tag has been defined. It then creates an Adobe Sign form field with the properties you have defined.

Tags allow for specific properties to be set for the fields. Using this with Acrobat’s form field placement tools, your document can be fully functional and professional in appearance.

Text Tag Version

This document describes the current, 2.0 syntax of Adobe Sign text tags. This syntax should be used for all new documents and revisions to existing documents. As of July 1, 2016, support will be discontinued for documents created using the older version of the text tag syntax. See the Text Tag Documentation for more information.

Creating Forms for Adobe Sign

Acrobat allows you to physically place form fields directly onto a document’s pages. This section explains how to add form fields, as well as options for having a more uniform look to the fields on your document.
Preparing the Form

1. Using Acrobat, open the PDF you want to convert to an Adobe Sign form.

2. Choose Tools > Prepare Form.

3. Click Start. Acrobat DC creates the form and opens it in the Form Editing mode. The right hand pane displays options for editing the form. The toolbar contains form field tools for adding additional fields.

   **Note:** If the document does not already have spaces or boxes that can be converted, a dialog notifying you that no form fields were detected displays. Click OK to continue.

4. In the right hand pane, click More and then choose Convert to eSign Form.
Adobe Sign

Acrobat searches the document for text, if any, identified by underlined spaces or empty boxes that can be converted to form fields. Ultimately the names of all of these form fields will be replaced with tags, but in the case where no tag is needed for the field; it will still remain uniquely named, avoiding any issues with cross field pollination. Cross field pollination is the process that Adobe Sign uses to copy data from one field to another if they have identical names.

5. When alerted that Acrobat removes form fields that Adobe Sign doesn't support, click Next.

![Acrobat Pro dialog]

6. When the subsequent alert displays, click OK.

![Acrobat Pro dialog]

Manually Placing Form Fields

If the form fields that were placed in your document are not exactly as you want, you can edit them by right clicking the field and selecting Rename Fields or Properties. You can also delete the fields place them manually. This section describes the process of adding new or replacement fields.

1. To add a field to the form, click to select the appropriate icon in the Select Object toolbar.

![Select Object toolbar]

Note: When creating of editing forms for Adobe Sign, the toolbar displays additional Adobe Sign specific fields such as Signature, Signature Block, Initial, Title, Company, and so forth.
2. Position the pointer where you want to place the field on the document, and click to insert it.

![Signature field](image1)

3. When the field is placed on the page, a small window will appear where the name of the field can be changed. For the process of adding fields to the document, this can be ignored for the time being, as you will be making changes to all of the field names on the document later.

![Field name change window](image2)

4. Clicking and dragging on one of the blue boxes (or handles) allows the size of the field to be changed.

![Field size adjustment](image3)
Changing Form Field Size and Alignment

Once field have been roughly placed on the document, tools within Acrobat can help you sizes more uniform and aligned.

1. If there are two or more fields of different sizes and you want the dimensions to match, left click to drag the cursor around the fields that need to be aligned to select them, then right click on the field that is the desired size.

![Example of selection box with fields selected]

In this example a selection box is created by dragging the cursor around all three fields, “Name1”, “Date1” and “Signature1”, then clicking on "Name1" to select its size.

2. Select **Match width and height** tool from the tools on the right.
3. As a result, "Date1" and "Signature1" are now the same size as Name 1.

You can optionally, left click to drag "Date1" to better align it with the "Date" text.
Using Tags in Placed Form Fields

Once your document has all of the form fields added, a listing of the fields displays to the right. This list can be used to find or access any form field on the document quickly, without being on the page. Since the names of the fields are displayed here, it makes checking the tags for the fields easy.

Naming Form Fields

Changing the name of the form field to an Adobe Sign tag allows you to apply all of the field properties recognized by Adobe Sign, without sacrificing space on the document like a text tag would.

To access the properties menu for the form field, either double click on the field or right click and choose "Properties" from the menu.
Adobe Sign

The General tab on the Properties window displays the Name, Tooltip, Field Type, Participant Role, and Common Properties of the field.

1. **Name** — Where the tag for the form field will be added
2. **Tooltip** — Information that will popup if the mouse pointer is held over the field
3. **Field Type** — Indicates the type of field such as Text, Signature, Date, and so on.
4. **Participant Role** — Determines which signing party should interact with that field such as Sender, Signer, Prefill, and so on.
5. **Read-Only** — Makes the field inaccessible and not editable, generally used if the field is being populated through an integration or using a CSV file.
6. **Required** — Marks the field as required so the signing process cannot be completed unless data is entered into this field

While the Adobe Sign drag-and-drop authoring environment does not support (or have an option for) multi-line fields, you can set a field up this way in Acrobat and have it function through Adobe Sign. This option is called "Multi Line Field" under the "Options" tab.

Refer to [Text Tag Documentation](#) for tags to be used in the form fields on your document.

Please note that the Text Tag Documentation shows all tags with "{{}}" surrounding them, as it is necessary for them to be processed. These "curly braces" are not necessary and should be omitted in order for them to function within the form fields.

**Placing Other Objects**

Aside from the standard text fields, Acrobat has check boxes, radio buttons and dropdown menus that will function through Adobe Sign. The options for these objects can be applied using the arguments in the tag, or through the object properties in Acrobat.
**Adobe Sign**

If you choose to use the object properties in Acrobat, ensure you still enter a basic tag for the name of the object. For example, if you have a check box and all of the settings were set in the Properties window, just name it CB1_es_:signer1, for example. This will ensure the object has a name and is assigned to the intended recipient.

**Check Boxes**

Selecting “Check Box” from the “Select Object” bar changes the cursor and allows you to place the check box. See [Manually Placing Form Fields](#) for more information.

To access the properties menu for the check box, either double click on the field or right click and choose “Properties” from the menu.

Under Options, the available settings are **Check Box Style**, **Export Value**, and the **Check box** is checked by default option. Changing the “Check Box Style” will not affect how the check box is visually represented in Adobe Sign, but the resulting PDF document will have the chosen style.

![Check Box Properties](image)

**Radio Buttons**

Selecting “Radio Button” from the “Select Object” toolbar changes the cursor and allows you to place the radio button. See [Manually Placing Form Fields](#) for more information.
Adobe Sign

When you place the radio button, the basic properties dialog displays warning you that there needs to be a minimum of two radio buttons in the group because radio buttons provide a "one or the other" solution. Another radio button can be added by clicking the "Add Another Button" link or by choosing "Radio Button" from the "Select Object" toolbar again, placing the object and renaming it to the same Group Name.

To access the properties menu for the radio button, either double click on the field or right click and choose "Properties" from the menu.

Under Options, the available settings are the Button Style, Radio Button Choice, and the two options: Button is checked by default and Buttons with the same name and choice are selected in unison, which links identically named buttons. The name of the radio button determines what group it is in, so if you’re creating an array of radio button options, they will need to be named identically in order to be a part of the same group.
Dropdown Menus

Selecting “Dropdown” from the “Select Object” toolbar changes the cursor and allows you to place the dropdown menu. See Manually Placing Form Fields for more information.

To access the properties menu for the dropdown, either double click on the field or right click and choose “Properties” from the menu.

Under Options, the available settings are Item, Export Value, Item List, Sort Items, Allow user to enter custom text, Check spelling, and Commit selected value immediately.

Enter the name of the option in the "Item" field. Additionally an export value is recommended. For example if the item is “Red”, the export value might be “R”. This value can then be exported during the signing process. Once you’ve set up the dropdown choice, click the Add button.
Adobe Sign

This moves the options down to the Item List where they can be sorted and managed.
Naming the dropdown with a tag is suggested, as it provides an opportunity to name and set the role for the field, for example: DD1_es:signer1: