

ADOBE SIGN QUICK TIPS

FLATTENING A PDF FILE

Open the PDF document and print the document into an Adobe PDF by clicking on the drop-down menu of the Printer. Flattening the file will turn off the active form fields for all the recipients. Upload the new flattened PDF file onto the Adobe Sign agreement.

| Printer: Adobe PDF V Properties | Advanced Help 🤅 |
|---|--|
| Copies: 1 Print in grayscale (| (black and white) 🗌 Save ink/toner 🕕 |
| Pages to Print ● All ○ Current ○ Pages 1 ▶ More Options | Scale: 100% 8.5 x 11 Inches |
| Page Sizing & Handling ① Size Poster Multiple Booklet | The second |
| Fit Actual size Shrink oversized pages Custom Scale: Choose paper source by PDF page size | |
| Orientation: ● Auto | Visconstancestandi U.B. B. A.B. Segmentation constraintentity Inconstraintentity of the seconstance |
| Comments & Forms | <u></u> |
| Document and Markups v Summarize Comments | < |
| | Page 1 of 1 |

After assigning the recipients, and the flattened file is uploaded, click on "Next" to proceed to the next screen. You will see a blue dialog box asking if you'd like to "Place All Fields." Click on the "X" in the top-right hand corner to ensure the form/agreement is not fillable.

| i Form fields were detected in this agreement. | (\mathbf{x}) |
|--|----------------|
| Place All Fields | $\overline{}$ |

ASSIGNING THE INITIALER ROLES

For the recipients who only need to initial the agreement, change the role from "Signer" to "Approver." Doing so will prevent Abobe Sign from generating a signature block at the end of the agreement for the initialer.

| Send from: Default Group (Primary Group) - | | oup) 👻 🔞 | | |
|--|----------------------------|-------------------|-------------------|-------------------|
| Recipients* | | | | |
| Complete in C | Order Complete | e in Any Order | Add Me Add | d Recipient Group |
| 1 6 | ♂ ➤ Enter recipient | email | | |
| ihow CC | Signer | | | |
| Message* | Approver | | | |
| Agreeme | Form Filler | | Options | 0 |
| Please revie | ew and complete this docur | nent. | | |
| | | | Recipients' Langu | Jage |
| iles * | | | English: US | |
| | | | | |
| | | | | |
| | Drag | & Drop Files Here | | |
| | 0 | | | |
| | | | | |
| | | | | |



If the Missing Signature Fields dialog box pops up, that means a signature field to a Signer was not assigned or an Initialer field was placed without a signature field. If the intent is for the recipient to initial only, select Review and modify the role of the initialer as an "Approver."

| Missing Signature Fields | × | | |
|--|-------------|--|--|
| There are recipients who need to sign this document that do not have a signature field assig them. You can go back and add signature fields or we will add a signature block for those recipients. Do you want to review or send the document? | | | |
| (| Review Send | | |