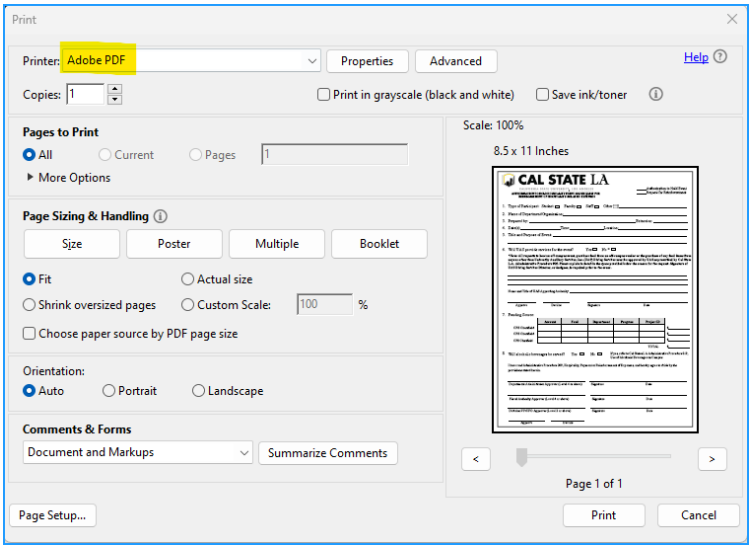
ADOBE SIGN QUICK TIPS

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.

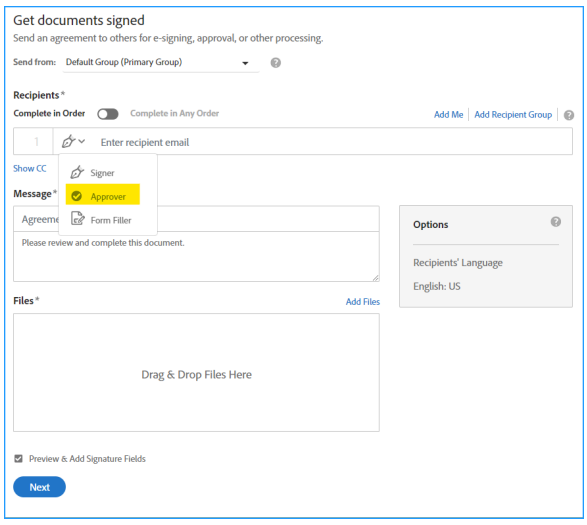


After assigning the recipients, and the flattened file is uploaded, click on “Next” to proceed to the next screen. You will see a blue dialog box asking if you’d like to “Place All Fields.” Click on the “X” in the top-right hand corner to ensure the form/agreement is not fillable.



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.



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.”

