

EchoSign Smart Forms allow you to collect data from your signers, position signature and initials fields in your documents, collect two-party information from both sender and signer and more.

Convert your document to PDF and follow the directions below to create your EchoSign Smart Forms in Acrobat Pro.

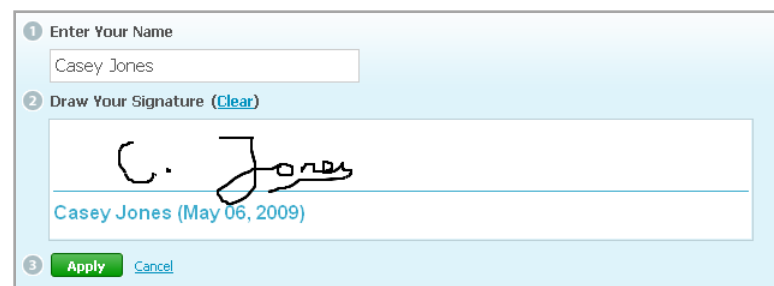
Note: *EchoSign does not support forms created with Adobe LiveCycle Designer.*

EchoSign Smart Forms allow you to enjoy the following benefits:

- The best signing experience – EchoSign’s signing wizard guides signers through the documents so they can easily sign any form.
- 100% web-based. Allow your customers to sign without requiring them to have Adobe Reader installed.
- Set locations for customers to initial documents
- Enables EchoSign’s Advanced and Biometric signature options



A screenshot of a simple EchoSign form. On the left, a green arrow button labeled "Next" points to the right. The form contains four fields: "Signature:" with a yellow box containing a blue pen icon and the text "Click to Sign"; "Email:" with the text "Casey.Jones@myCompany.com"; "Title:" with a light blue box containing the text "Please enter your job title..."; and "Company:" with a light blue box containing the text "Please enter your company name...".



A screenshot of the EchoSign signing wizard. It shows three steps: 1. "Enter Your Name" with a text box containing "Casey Jones"; 2. "Draw Your Signature (Clear)" with a signature field showing a handwritten signature "C. Jones" and the text "Casey Jones (May 06, 2009)"; 3. "Apply" and "Cancel" buttons.

You may create simple EchoSign forms by including special text tags in any document you send through EchoSign (Word, PDF, Text, etc.). For more details read our [Text Forms Tutorial](#).

If you require advanced Adobe forms features such as drop down lists, calculated fields, form field validation, field formatting, etc. please read our [Adobe Forms Tutorial](#)

Creating Adobe PDF Forms

Open the Forms Toolbar

Acrobat Pro 9: Forms → Edit Fields

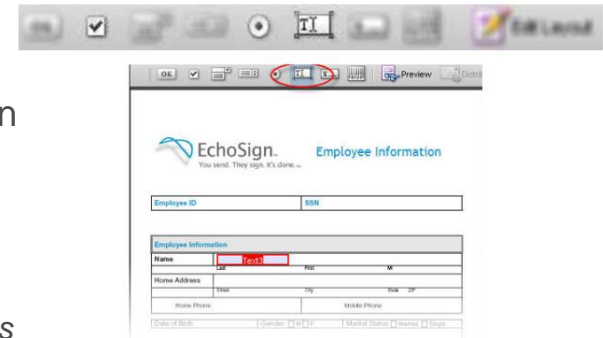
Acrobat Pro 8: Tools → Forms → Show Forms Toolbar

Acrobat Pro 7: Tools → Advanced Editing → Show Forms Toolbar

Create Form Fields

Select an icon from the toolbar and create interactive form fields in your document. EchoSign currently supports text, check box and radio button form fields.

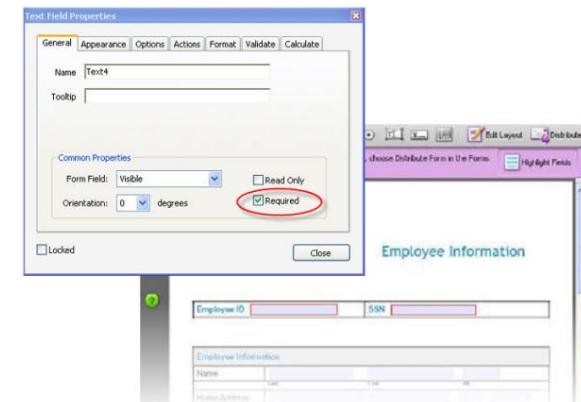
Note: buttons, combo, drop down lists, list boxes, bar codes and digital signature fields are currently not supported within the EchoSign Smart Forms signature workflow.



Marking Mandatory Fields

Ensure signers complete essential information before signing by setting the field property to “Required” in the Field Properties dialogue box.

Required fields will be highlighted and outlined in red.



Collecting Data From Specific Signers

Fields can be assigned to specific signers by appending an EchoSign-specific suffix to their names. A field that does not have such a suffix (e.g. [address](#)) can be filled by any signer. After it has been filled, the field will be locked to prevent subsequent signers from changing its value.

Associating a Field With a Specific Signer.

You can instruct EchoSign to distinguish between fields that need to be filled by the sender or the signer by adding a suffix to their names. For senders, add [_es_sender](#). For signers, [_es_signer](#).

For example, [text4_es_sender](#).



If you have a document that needs to be signed by multiple signers in sequential order, you may associate fields with up to 6 signers using [_es_signer1](#), [_es_signer2](#) to [_es_signer6](#).

Sender Pre-Fills Data, Only Signer Sign

In some cases, the sender is not required to sign the document but needs to enter data before the document is sent out for signature. This can be achieved by adding the [_es_prefill](#) suffix to the names of relevant fields.

For example, [price_es_prefill](#).

Note: Pre-fill is enabled by default only for documents uploaded to your EchoSign library. Contact EchoSign support to enable pre-fill for documents sent directly from the EchoSign send page.

EchoSign Signature Fields

You may position EchoSign signature or initial fields by adding a suffix to designate the type of the signature field and whether it should be signed by the sender of signer.

To position a signature field by appending *_signature* to the field name.

To position an initials field, append *_initials*

For example:

signHere_es_signer_signature, clause1_es_signer_initials, senderSign_es_sender_signature

When sending such a PDF document for signature, signature and initials fields would require the signers to enter their signature or initials at the designated locations:

In the PDF Form:

Sign Here	Signature of U.S. person ▶	<div>sig_es_signer_signature</div>
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When Signing:

Sign Here	Signature of U.S. person ▶	<div> Click to Sign</div>
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And, in the signed document

Sign Here	Signature of U.S. person ▶	<div> Casey Jones (May 6, 2009)</div>
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Additional EchoSign Fields

You may position these EchoSign fields in your document by appending their names to the field name

Data Entry fields

`_title` – The signer's job title.

`_company` – The signer's company.

`_fullname` – The signer's full name

Read Only fields

`_date` – signature date

`_email` – the signer's email address

For example: `_es_signer_title`, `_es_signer_company`, `_es_sender_fullname` etc.

The EchoSign Signature Block

If no signature field was placed in the document for a specific signer, EchoSign will automatically place a signature block at the bottom of the document.

Depending on your account configuration, signers may also be required to provide their title and company. In that case, EchoSign will present a signature block containing those fields in case they were not place in the document.

You may position the entire EchoSign signature block in your document by appending `_signatureblock` to the end of the field name

For example: `_es_signer_signatureblock`, `_es_sender_signatureblock`