Using the Adobe Sign Tool in Adobe Acrobat DC – Cuesta College

When to use to use the Adobe Sign tool

- Adobe Sign at Cuesta College is intended for use by employees gathering signatures on an ad-hoc basis. Test
- When using Adobe Sign for gathering signatures you must know the names of all the recipients who need to sign prior to sending the document.
- Document signatories <u>cannot</u> be dependent on prior signatures or dollar limit amounts that are learned about after the document is sent.

Where to find the Adobe Sign tool

- Not all accounts have access to the Adobe Sign tool. To request access email ITsupport@cuesta.edu.
- Locate the tool in Adobe Acrobat DC by selecting the Sign dropdown menu or by using the Tools tab and selecting the Adobe Sign tool under the Forms & Signatures category.
- Go to the Adobe Sign portal for full access to all Adobe Sign options.

How to use Adobe Sign tool

1. Open the PDF document that requires signatures
2. Select the E-**Sign dropdown menu**, then choose **Request E-Signatures**
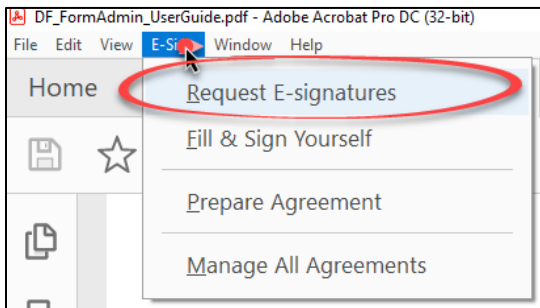
3. In the new window, type in at least one email address, then select **More Options**
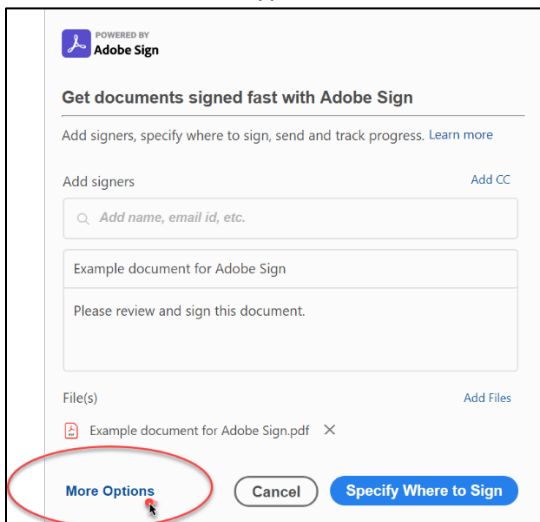
4. In the **Recipients section**:
   a. Use the toggle to choose to Complete in Order or Complete in Any Order

b. Enter an email address for each person who needs to sign the document (emails/recipients can be internal or external)

5. The request for signature will be sent via email. In the **Message section**:
   a. Edit the text to provide a subject line
   b. Edit the text to provide an email message to be sent with the request

6. In the **Files section**:
   a. Confirm that you see the name of the file that you opened to begin the process
   b. *(Optional) Add any additional files that also need to be included, by selecting the Add Files option. Note: All files will be returned as one file and you will not be able to separate the files once returned with signatures.*

7. In the **Options section**:
   a. Password Protect – typically this feature is not utilized by Cuesta employees. Learn more about this feature on the Adobe support pages.
   b. Set Reminder – use this option to set automatic reminders to recipients about the request for signature if the document has not yet been signed.

8. Ensure the Preview & Add Signature Fields box is checked and select Next.

☑ Preview & Add Signature Fields

[Next]

9. Assign Signatures and fillable fields by:
   a. Select the correct recipient
   b. Expand the Signature Fields section and select Signature to drag and drop a signature field to the appropriate location on the form. Note: if you do not see the option to select signature fields, ensure "Advanced editing on", is toggled on.
      i. Repeat steps a and b as necessary for each recipient

c. Add or Edit any other fillable fields on the form. To edit a field, right click on an existing fillable field and select Edit.
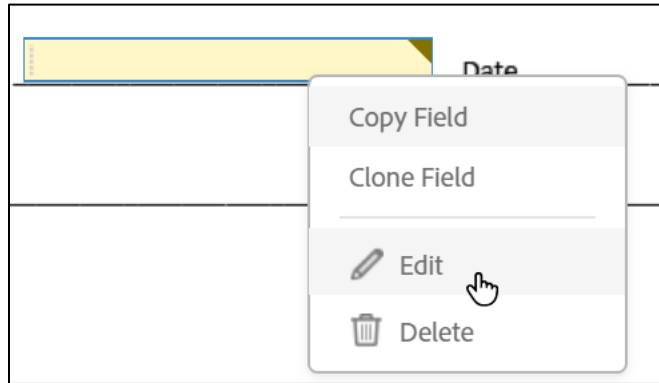
10. Once all new fillable fields and signature fields are added and assigned, select Send.

Managing the Form After Sending

- You will receive email communications as recipients complete and sign the form
- Once all recipients have signed you will want to download and save the final copy
- You can also manage the form by logging into the online Adobe Sign portal and select Manage

To learn more about Adobe Sign, visit the Adobe Sign support page.