

On-demand webinar

Your Guide to Smart PDF Forms in Acrobat

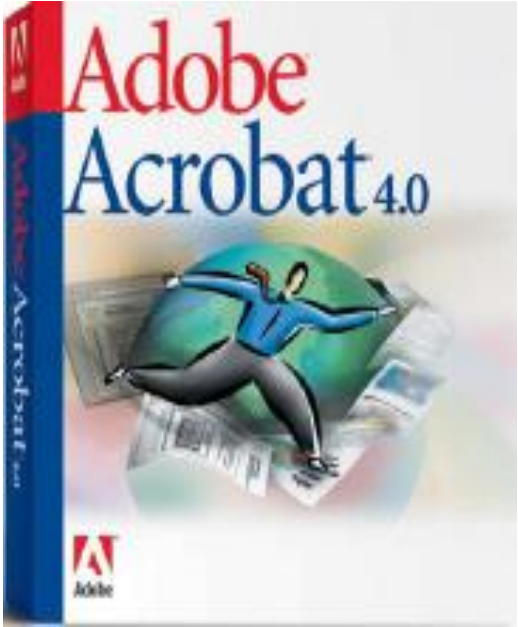
Our speaker



Lori DeFurio

Principal Evangelist

Adobe



Form **1040** Department of the Treasury—Internal Revenue Service **1999** (99) IRS Use Only—Do not write or staple in this space.

U.S. Individual Income Tax Return

For the year Jan. 1–Dec. 31, 1999, or other tax year beginning , 1999, ending , OMB No. 1545-0074

Label
(See instructions on page 18.)
Use the IRS label. Otherwise, please print or type.

L A B E L H E R E

Your first name and initial	Last name	Your social security number .
If a joint return, spouse's first name and initial	Last name	
Home address (number and street). If you have a P.O. box, see page 18.		Apt. no.
City, town or post office, state, and ZIP code. If you have a foreign address, see page 18.		

Presidential Election Campaign
(See page 18.)

Do you want \$3 to go to this fund?	Yes	No	IMPORTANT! You must enter your SSN(s) above. Note. Checking "Yes" will not change your tax or reduce your refund.
If a joint return, does your spouse want \$3 to go to this fund?			

Filing Status

1	☐	Single
2	☐	Married filing joint return (even if only one had income)
3	☐	Married filing separate return. Enter spouse's social security no. above and full name here. ►
4	☐	Head of household (with qualifying person). (See page 18.) If the qualifying person is a child but not your dependent, enter this child's name here. ►
5	☐	Qualifying widow(er) with dependent child (year spouse died ► 19). (See page 18.)

Check only one box.

Exemptions

6a	☐	Yourself. If your parent (or someone else) can claim you as a dependent on his or her tax return, do not check box 6a.	} No. of boxes checked on 6a and 6b _____
b	☐	Spouse /	

Agenda

01

Understanding field types

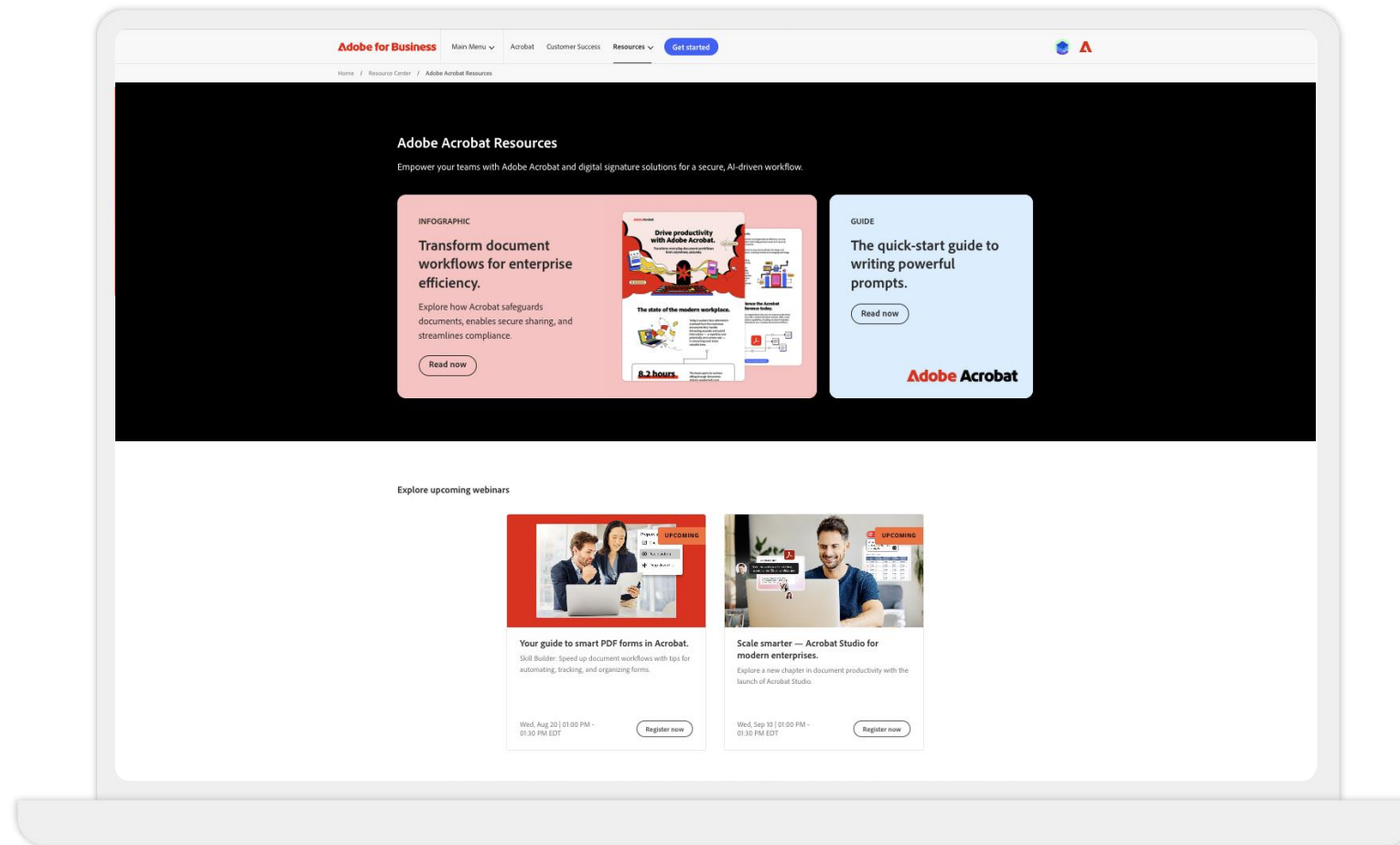
02

Design considerations

03

Distributing and collecting

Adobe Acrobat Webinar Hub



Create and distribute fillable PDF forms

- 1. Create your PDF template.**
2. Add form fields to your PDF template.
3. Review and edit field types.
4. Review tab order.
5. Distribute your form and collect responses.

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Do I need
e-signatures or not?

Create and distribute fillable PDF forms

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I want to use the built-in workflow to host the form online (create a web form).

I used JavaScript / calculations / actions, how can I ensure the user only uses Acrobat / Reader to fill and send?

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Do I want to use field types that provide more interactivity, or do I want the lowest common denominator to work in all viewers?

Combine files

Add files

🗑

📁

☰

⚙ Options

Close

Combine



ConradSimms.pdf



GloriaBarry.pdf



Mendoza.pdf



Options

File Size:

Other options

☐ Always enable accessibility and reflow

☒ Always add bookmarks to Adobe PDF

☒ Continue combining if an error occurs

☒ Save as PDF Portfolio

☒ Convert all files to PDF when creating a portfolio

☐ Always delete source files after combining

OK

Cancel

ConradSimms.pdf

Name

ConradSimms.pdf

GloriaBarry.pdf

Mendoza.pdf

RoseWhite.pdf

Descr



POST-EVENT FEEDBACK

Submit

Reset

Please complete all fields and submit within five days of attendance. Forms submitted more than five days after the date of the evnt will not be valid.

Your Name:

Conrad Simms

Event Date:

Apr 29, 2024

Event Name

Acrobat Skill Builder

Sponsoring Department:

Biology

Location:

San Francisco

Did you arrive late?

☒ Yes

☐ No

What toppings were on the pizza you ate?

☐ Mushrooms

☐ Pepperoni

☐ Olives

☐ Extra Cheese

Please indicate your status

☐ First-Year

☐ Transfer

☐ Graduate School

☐ Military

☒ Non-Degree

ID #:

555555555

Travel Expenses



GloriaBarry.pdf

Name

ConradSimms.pdf

GloriaBarry.pdf

Mendoza.pdf

RoseWhite.pdf

Descr

ALTURA
TECHNOLOGY

POST-EVENT FEEDBACK

Sub

Reset

Please complete all fields and submit within five days of attendance. Forms submitted more than five days after the date of the evnt will not be valid.

Your Name:

Gloria Barry

Event Date:

Apr 11, 2024

Event Name

Acrobat Skill Builder

Sponsoring Department:

Biology

Location:

San Francisco

Did you arrive late?

☒ Yes

☐ No

What toppings were on the pizza you ate?

☐ Mushrooms

☒ Pepperoni

☐ Olives

☐ Extra Cheese

Please indicate your status

☐ First-Year

☒ Transfer

☐ Graduate School

☐ Military

☐ Non-Degree

ID #:

6

6

6

6

6

6

6

6

6

Travel Expenses





Submit Form

Reset Form

Text Fields

First Name: _____

Please provide feedback:

Date Field*

Date of training: _____

Drop-down lists

Dietary Restrictions: Select one...



Radio Buttons/Check Boxes

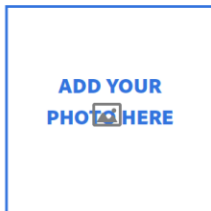
Do you want a copy of the transcript: ☐ Yes ☐ No

Which sessions did you attend? (select all that apply)

- ☐ Intro to PDF accessibility with Adobe Acrobat. (February 2025)
- ☐ Fast Accurate Insights Across Your Documents (April 2025)
- ☐ Work from Anywhere with Adobe Acrobat (May 2025)
- ☐ Edit, Organize, and Convert PDFs with Acrobat (June 2025)
- ☐ Beyond the Basics — Creating Accessible PDFs (July 2025)

Special fields

Image**



Button**

PUSH ME



Submit Form

Reset Form

Text Fields repeated on multiple pages

First Name: _____

Format/Validate/Calculate/Show & Hide

Format

Validate

Phone Number: _____

Donation amount: _____

Calculate

Description of expense	Amount (USD)
Total	\$ 0.00

Show & Hide

What day will you arrive?

- ☐ Friday
- ☐ Saturday
- ☐ Sunday

Actions & Links

Linking to a URL: For more information, please visit our [home page](#).

Learn more...

Use a menu command:

Show attachments

Go to a page view:

Go to page 1

Signature

Signature



Reset Form



Please provide feedback:

Date Field*

Date of training: _____

Drop-down lists

Dietary Restrictions: _____

Radio Buttons/Check Boxes

Which phone number is best?

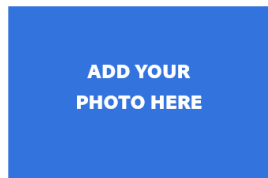
☐ Office ☐ Mobile

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Special fields

Image**



Button**

Reset Form

Submit Form



Reset Form

Text Fields repeated on multiple pages

First Name: _____

Format/Validate/Calculate/Show & Hide

Format

Phone Number: _____

Validate

Donation amount: _____

Calculate

Description of expense	Amount (USD)
Total	

Show & Hide

What day will you arrive?

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Actions

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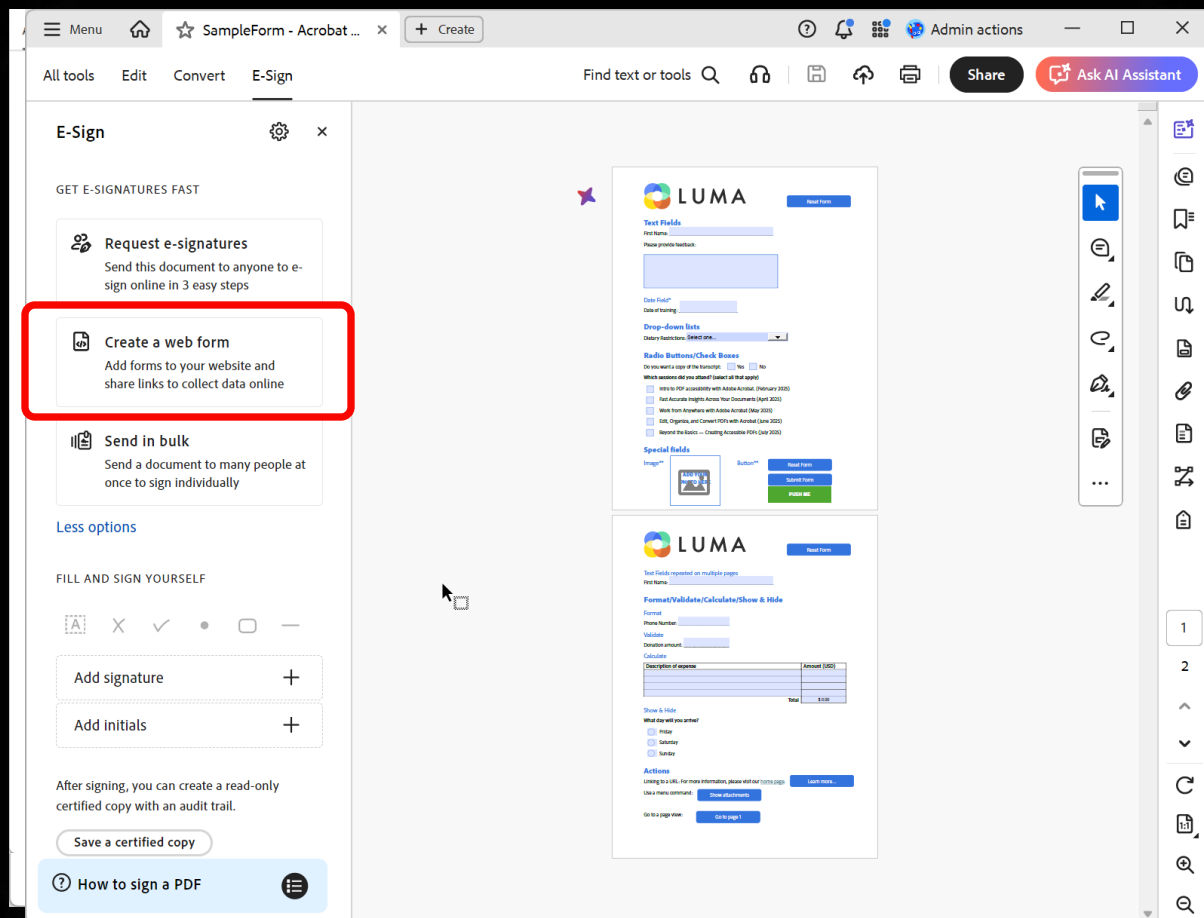
Show attachments

Go to a page view:

Go to page 1

Distributing your form

- Don't use "Send" in Acrobat when you have an Acrobat form — it's antiquated and can't export the data to Excel.
- Semi-automated option — using the "Submit a form" action
- Fully automated option — leverage e-sign tools
 - Create a web form



How will your forms behave?

PDF viewer	Fillable fields	Calculations	Actions	JavaScript	Ability to extract data
Adobe Acrobat (desktop)	✓	✓	✓	✓	✓
Adobe Reader (desktop)	✓	✓	✓	✓	✗
Acrobat mobile app	✓	✓	?	✓	✗
Acrobat.com (web)	✓	✓	?	?	✗
Google Chrome	✓	✓	?	?	✗
Microsoft Edge	✓	✓	?	?	✗
Apple Safari	✓	?	✗	?	✗
Microsoft Teams	✓	✓	✗	?	✗
Dropbox	✗	✗	✗	✗	✗
Box	✗	✗	✗	✗	✗
Alternate PDF tools	✓	✓	?	?	?

✓ Works as expected | ? Varies; you'll have to test | ✗ Not supported

Our form's behavior

Field	Acrobat	Reader	Acrobat.com	Acrobat mobile app
Text fields including calculate & format & validate	✓	✓	✓	✓
Submit a form	✓	✓	X	✓
Reset a form	✓	✓	✓	✓
Date field	✓	✓	✓	✓
Drop-down lists	✓	✓	✓	✓
Radio buttons / Check boxes	✓	✓	✓	✓
Image field	✓	✓	X	X
Show / Hide	✓	✓	X	X
Link to URL	✓	✓	✓	✓
Box	✓	✓	✓	✓
Show attachments	✓	✓	X	X
Go to page view	✓	✓	✓	✓
Signature	✓	✓	X	X

✓ Works as expected | X Not supported

Summary

01

Understanding field types

02

Design considerations

03

Distributing and collecting

Helpful resources

[Skill Builder: Beyond the Basics — Creating Accessible PDFs](#)

[Skill Builder: Edit, Organize, and Convert PDFs with Acrobat](#)

[Adobe Acrobat Webinar Hub](#)

[Adobe Acrobat Learn & Support](#)

[Adobe Acrobat Plans & Pricing](#)

[Adobe Trust Center](#)

[Create Fillable Forms](#)

[Advanced Form Fields](#)

Your Guide to Smart PDF Forms in Acrobat

Session summary

This webinar, led by Lori Defurio, focuses on creating and working with interactive, fillable PDF forms using Adobe Acrobat. Attendees learn about the evolution of PDF forms since their introduction in Acrobat 4.0, explore various form field types, and discover workflows for distributing forms, collecting data, and ensuring functionality across different PDF viewers. The session also includes time-saving tips, accessibility considerations, and methods to mitigate issues with non-Acrobat PDF viewers.

Key takeaways

- **Interactive PDF forms:** Acrobat provides tools to create text fields, drop-down lists, radio buttons, checkboxes, image fields, and more.
- **Time-saving features:** Use auto-detect form fields, single key accelerators, and copy-paste functionality to streamline form creation.
- **Accessibility and tab order:** Ensure proper tab order for a positive user experience and accessibility compliance.
- **Data collection options:** Distribute forms via email, web links, or Acrobat Sign tools, and export responses into spreadsheets.
- **Cross-platform functionality:** Test forms in different PDF viewers and use strategies like PDF portfolios to ensure intended behavior.

Step-by-step demo tutorials

Demo 1: Creating a PDF template

1. Open Microsoft Word, Adobe InDesign, or Google Docs to create the underlying template for your form.
2. Save the document as a PDF.
3. Open the PDF in Acrobat.
4. Add the Prepare form tool to the top of the tools menu.
5. Add the Edit PDF form tool to the quick tools menu.
6. Use the keyboard shortcut Shift Control 7 to activate Edit PDF form.

Demo 2: Adding form fields

1. Select Prepare form tool.
2. Ensure auto-detect form fields is turned on.
3. Check the box for e-signatures if needed, or select Create form.
4. Acrobat analyzes the document and automatically adds form fields.
5. Open Preferences using Control K or Command K.
6. Select Forms and turn off Show border hover color for fields.
7. Open the Fields panel to review field names and tooltips.
8. Select the first field, open its properties, and review the name and tooltip.
9. Navigate through fields using the Fields panel to update names and tooltips.

Demo 3: Reviewing and editing field types

1. Ensure fields like First Name replicate across pages by renaming them consistently.
2. Delete unnecessary text fields and add new ones like Date fields or drop-down lists.
3. Copy fields from a separate document and paste them into the form.
4. Adjust field positions and test them using sample data.
5. Add Submit and Reset form buttons:
 - a. For Reset form: Set the button field to no fill, no outline, and use the action Reset a form.
 - b. For Submit form: Add an action to submit the form via email.
6. Format text fields for validation, calculations, and appearance.
7. Add actions to radio buttons for show/hide behavior.
8. Use the Link tool to add hyperlinks or jump to specific pages.

Demo 4: Reviewing tab order

1. Select the three dots in the Fields panel and choose Show tab numbers.
2. Drag and drop fields into the correct order manually.
3. Alternatively, click the funnel icon and select Order by row to automatically reorder fields.

Demo 5: Distributing forms and collecting responses

Semi-automated distribution:

1. Add a Submit form button to the form.
2. Host the form in a folder, email it, or post it on a website.
3. Open the filled-out forms in Acrobat.
4. Select Prepare a form or Edit PDF form tool.
5. Choose Merge data files into spreadsheet.
6. Select the files and export the data into a spreadsheet.

Creating a web form:

1. Select Prepare form for e-signing.
2. Acrobat switches the toolset and removes unsupported fields.
3. Adjust fields like drop-down lists to visible.
4. Select Create a web form.
5. Upload the form to Acrobat.com.
6. Choose the form type: Sign, Approver, or Fill form.
7. Add missing fields like image fields or calculations.
8. Set conditions for drop-down lists using the Condition tool.
9. Add hyperlinks using the Hyperlink field.
10. Select Create to generate a URL for the web form.

Testing the web form:

1. Open the URL.
2. Fill out fields like text boxes, drop-down lists, and radio buttons.
3. Test formatting, validation, and calculations.
4. Verify hyperlinks and signature fields.

Using PDF portfolios:

1. Open Acrobat and select the Combine files tool.
2. Choose Save as PDF portfolio.
3. Add a customized cover sheet with instructions.
4. Use the Guided actions tool to wrap the form in a PDF portfolio.
5. Test the portfolio in Acrobat and other PDF viewers.

Your Guide to Smart PDF Forms in Acrobat

If a form needs to be routed to multiple people for signature, can the form filler decide who the designated signees are, or must it be decided when the form is created?

The signers can be set when the form is sent for signature.

Does this have Part 11 Compliance?

It can but you need to add tooltips and set the tab order.

How do I access the codes for a form being created by someone else?

As long as the form is not secured it can be edited by anyone.

We typically start with a Word doc to create the form, and then convert it into a PDF. Lastly, we convert it to a fillable form. What is the best way to edit the fillable PDF to change and add fields? Do we need to go back to the Word doc and start over?

A recommendation is to create the form in InDesign where you can design the form and add fields at the same time. It's one step in one product rather than multiple tools.

Can I share a template created in e-sign to users that only have AdobePro version?

No. Not at this time.

Thank you

Adobe Acrobat