

Preparing PDFs for Electronic Distribution in Adobe Sign

This guide explains how to prepare PDFs before sending them through Adobe Sign. Following these steps helps prevent issues like fields auto-filling unexpectedly or values appearing in the wrong places when documents are sent for electronic signature.

Why preparation matters

Some older or reused PDFs contain hidden form settings or background logic that isn't visible on the page. This is especially true if a form was created with Adobe Acrobat. When these PDFs are uploaded into Adobe Sign, those hidden settings can cause unrelated fields to fill in automatically or share values across different documents.

Best practice – flatten (or export) PDFs before upload

If a PDF comes from an older source, another department, or an external system, it should be flattened before uploading to Adobe Sign. Flattening removes hidden form logic and turns the document into a clean, static PDF that Adobe Sign can safely work with.

Simple ways to flatten a PDF:

- Open the PDF and use an Export or Save As option to create a new PDF copy. Rename as needed.
- Print the document to PDF and use that newly created file as the upload source.

When flattening before uploading, Adobe Sign will re-detect fields cleanly without carrying over hidden or outdated settings.

Best practice – rename fields when sending *multiple* unrelated documents at the same time

When multiple unrelated PDFs are combined into a single Adobe Sign request, fields that share the same label (for example, "Date" or "Name") can sometimes be treated as the same field, even when they shouldn't be.

To avoid this, *rename* key fields before sending when documents are unrelated. For example:

- Form A – Date
- Form B – Date

This ensures each document keeps its own information and prevents values from appearing in the wrong place. In some cases, this may not matter (i.e. – when the referenced date fields should include the exact same info). But other times, it might (i.e. – one field is for a start date, and one field is for an end date).

Important note – you do NOT need to do this every time

Most users do not need to rename fields for standard use. If you are creating a template that will be sent as a single document or a multi-page version of the same form, Adobe Sign will automatically manage field names correctly (when auto-applied during upload).

These extra steps are mainly needed when combining multiple, unrelated documents into one signature request after the templates were already created or when sending multiple PDFs out for signature at the same time.

TLDR

- Flatten or export PDFs before uploading to Adobe Sign.
- Rename key fields when creating templates that *will be sent as part of a group of templates* when distributed, or when sending multiple unrelated documents together.
- For single or multi-page versions of the same template or uploaded form, no extra steps are usually needed.
- These steps prevent unexpected auto-filling and data appearing in the wrong places.