



WORK ANYWHERE WITH ADOBE DOCUMENT CLOUD

Collect signatures in bulk with Mega Sign

When you need to have many people individually fill and sign a form, use Mega Sign to bypass sending the same document to all recipients one by one. With one click, you can send any form or document to multiple people for them to sign and return — and you can easily track the entire process.

Requirements:

1. An Adobe Sign account

Please note: If you do not have an account already, please contact your Adobe team or IT administrator.

2. A PDF form to send for signatures

This example will show the process using a standard Policy Acknowledgement Form, which you can find attached to this document for your own use.

3. A list of employees who will fill out and sign the form

4. Personalized data for each individual that will be included in the form

*You can find a CSV file attached to this document that matches the sample form. For other Mega Sign agreements, download [this sample *.csv file](#) for use as a template.*

This guide covers:

PART 1

Create a document template with form fields, ready to send. [Start >](#)

PART 2

Set up the CSV template with the employee names and data to merge into the document template. [Start >](#)

PART 3

Send the template to multiple recipients using the Mega Sign feature in Adobe Sign. [Start >](#)

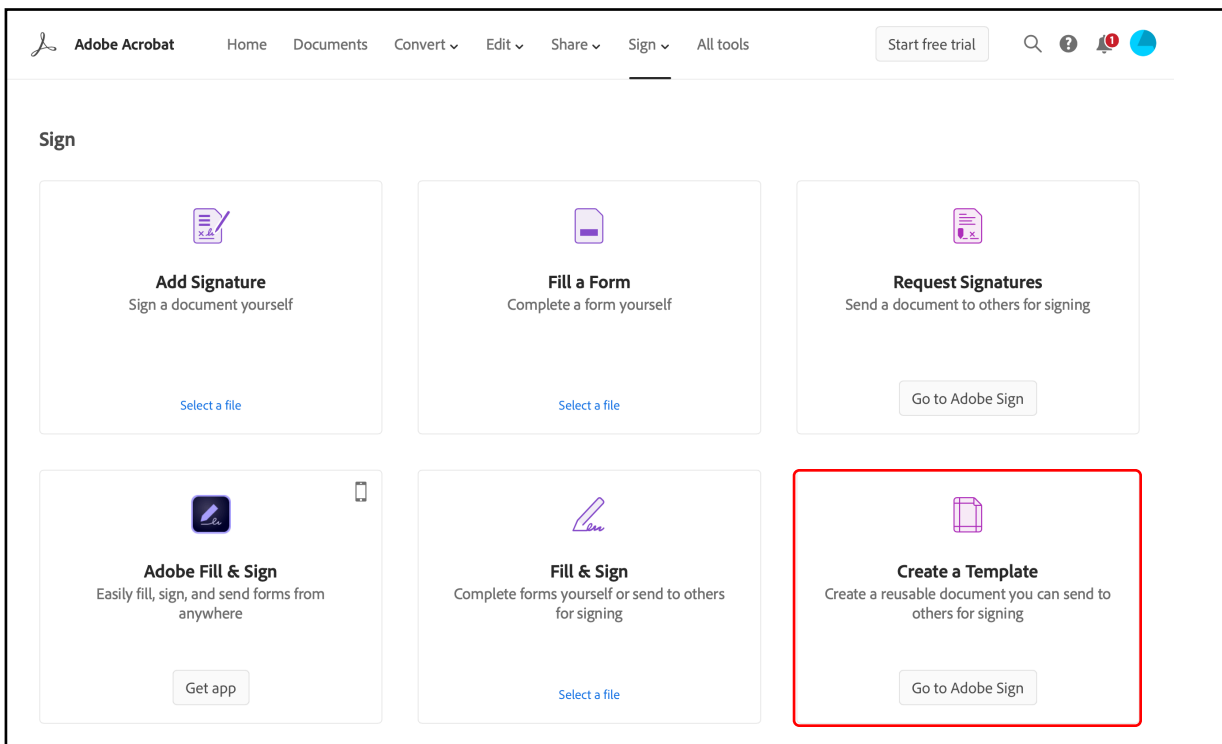
Note: If your Adobe Sign account doesn't show you the option to create a web form, check with your account administrator to verify that the feature has been enabled in Global Settings.

PART 1

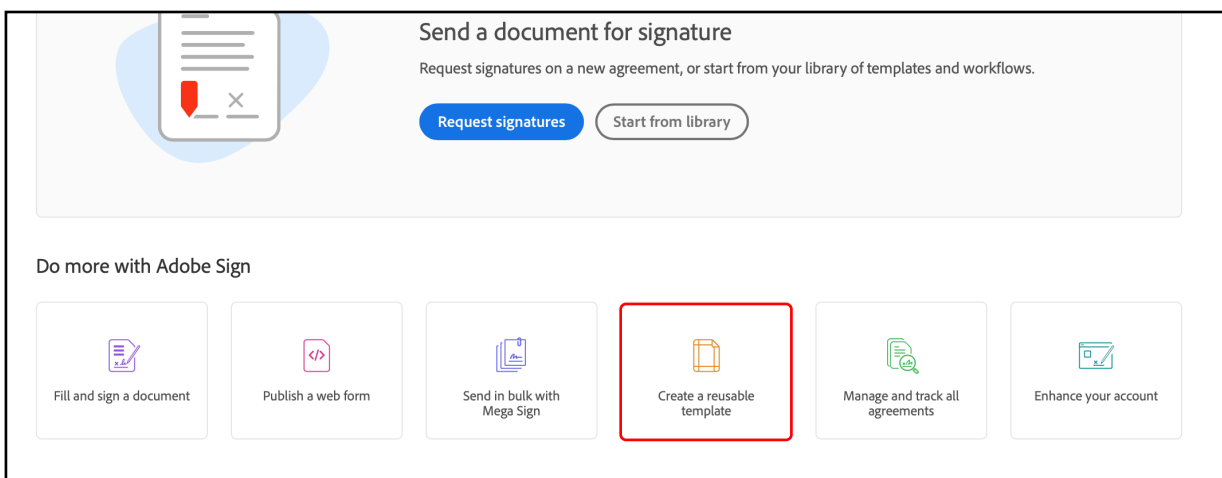
Create a new document template

A document template is a reusable form that you can access quickly from your document library and send to one or many signers without the hassle of setting it up new each time.

1. In your web browser, navigate to <https://documentcloud.adobe.com>.
2. Sign in using your username and password credentials.
3. From the top menu bar, click **Sign**, then select **Create a template**. This will take you to the Adobe Sign web interface.



4. From the Adobe Sign Home screen, click **Create Reusable Template**.



5. On the Create a Library Template screen, enter the name of your template into the **Template Name** **1** field. For this example, we'll use "Altura University Policy Acknowledgement".
If you do not explicitly enter a name for the template, this field will adopt the name of the first document added.
6. Locate your form on your computer and drag and drop the file into the **Files** **2** section. You can also click the **Add Files** link in the upper-right corner of the Files field to browse your system. *Multiple files can be attached to build one larger template if desired.*
7. Ensure the **Reusable Document** **3** type is selected on the right under "Template Type": this option saves the full document, both content and form fields.
8. Configure **who can use this template** **4**
9. Click **Preview & Add Fields** to move forward to the authoring environment.

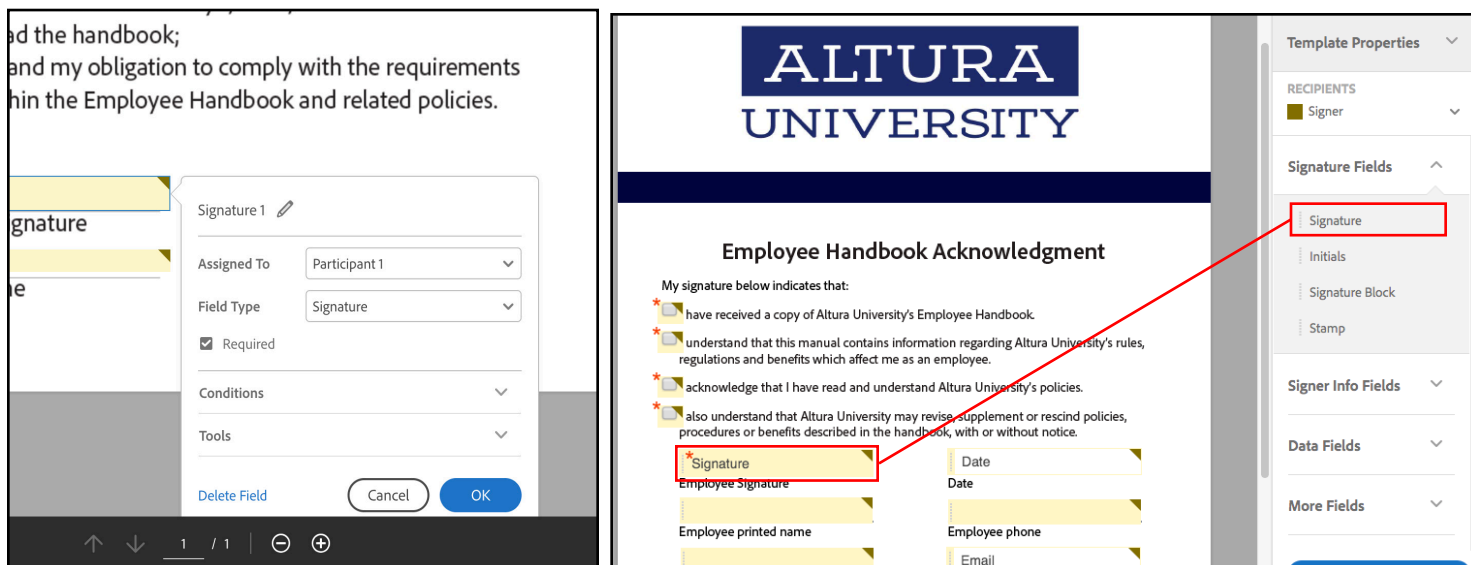
The drag and drop authoring environment allows you to add fillable form fields to your file. Simply drag fields from the right rail onto your document in the desired spaces.

Or, let Adobe Sign suggest form fields for you: Adobe Sensei's AI technology can detect form field candidates based on analyzing the content, attributes, and relative placement of attributes on the form. In the authoring environment, look in the upper left to find the blue alert that says "Form fields were detected in this document. On each page, click this button to place them."

Please note: When you're creating these fields, don't forget to **write down the specific field names you used** — we'll need them in Part 2 when we build the CSV file.

About form field editing:

If any details of a particular form field need to be customized or changed, you can double click on any existing field to edit or review its details while in authoring mode:



FIELD NAME

To change the name of the field (as is needed to match the CSV headers) double click the field; the field name appears at the top of the properties window.

Click the PEN icon to change the name.

Please note: Mega Sign is case sensitive, so make sure your field names and column headers match exactly.

FIELD VALIDATION

You can set up form fields to allow only a specific format of data to be entered.

[See examples of field validation here.](#)

CALCULATED FIELDS

Adobe Sign provides the ability to dynamically update the fields in an agreement based on the data entered by the signer when the agreement is signed.

[Get more information on calculated fields here.](#)

1. Double click the field to bring up the field attributes.
2. Change the **Value Type** attribute using the drop-down list to be of type **Calculated Value**.
3. Type the calculation expression in the text field called **Formula** or click on the function button (fx) to bring up the Expression Builder.

Please note: Field names are case sensitive, but can also be pulled from the list on screen.

4. Check the syntax of the expression by clicking the **Check Syntax** button.
5. Save all changes.

PART 2

Setting up your CSV

The CSV file we create at this stage will contain all the individual signers' data that you will import to Adobe Sign, and so each field on your form should have a corresponding column in this CSV file. That's why it's necessary to know the names of the fields in your document before creating your CSV file. If you don't know them or didn't write them down in Part 1, that's okay. Here is where you can find them:

1. Find the form in your templates and select "Edit Template" from the task menu on the right.
2. Double-click any of the fields, and the name of that field will appear at the top of its properties window.

Once you know the names of the fields on your document, download and open the sample CSV file from the Mega Sign send page, or simply start a new file in Excel.

[Click here to download a sample CSV for Mega Sign.](#)

A few things to note as you begin:

- There must be a minimum of two unique email addresses in the CSV file in order for Mega Sign to work.
- The sender's email address (whoever is sending the document for signature) cannot be included in the CSV.
- The first row of the document should be the field names and information tags. If you're starting with the sample CSV file, remember to edit the column headers in row 1 to reflect the field names of your own form.
- You only need to add columns to the CSV for data that you would like to be pre-loaded into the form fields; all other fields will be completed by the signer.
- The signers' email addresses are mandatory and must be included in the CSV file. Other fields can be added or removed as necessary.

SETTING UP THE CSV

1. Edit the column headers to match the related form fields in your document.
2. The first row in the screenshot below contains the field names and information tags exactly as they appear in the form. The information tags in the sample CSV are as follows:

`_email_es_:signer1:email` (*Mandatory)

The signer's email address

`Signer_name` (Optional)

Signer's name as used in the signature

`Signer_Title` (Optional)

Signer's Title used in the form

`Signer_phone_number` (Optional)

Signer's phone number

`Signer_city` (Optional)

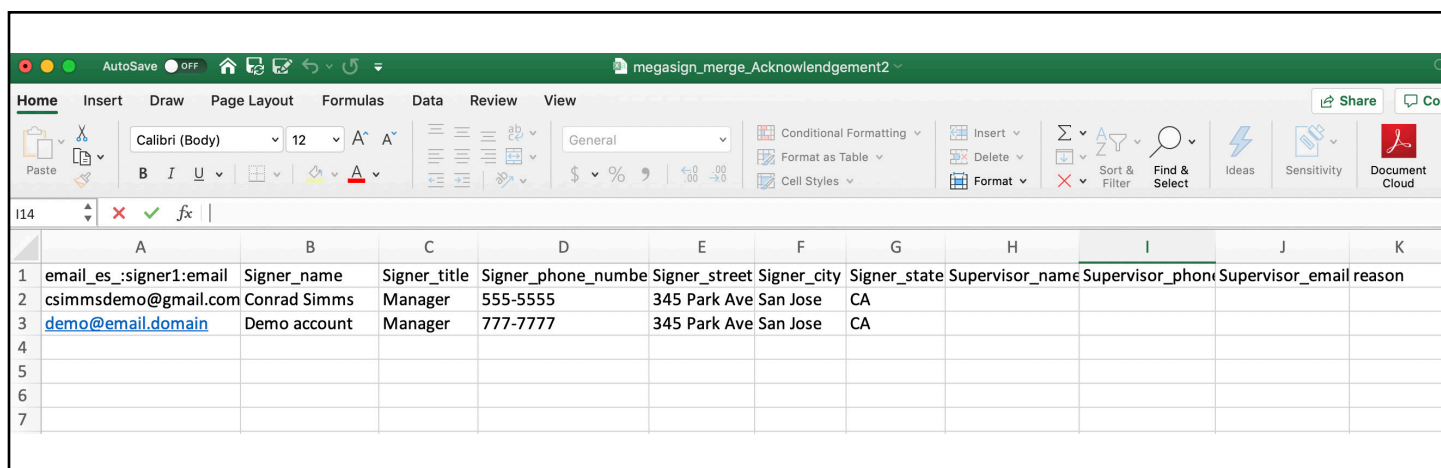
Signer's city

`Signer_state` (Optional)

Signer's state

The other field names shown in the screenshot below are custom fields that have been added to the document.

3. The second row is completed with the information specific to that signer. Here you see the email addresses, full name, company name, title, a custom message, and the information for the two custom fields.
4. Save the CSV file to your computer. Please ensure that it is in ***.csv format**, not *.xlsx format. We will upload it later when we're sending the agreement.



| | A | B | C | D | E | F | G | H | I | J | K |
|---|---------------------------------------|--------------------------|---------------------------|----------------------------------|----------------------------|--------------------------|---------------------------|------------------------------|-------------------------------|-------------------------------|---------------------|
| 1 | <code>_email_es_:signer1:email</code> | <code>Signer_name</code> | <code>Signer_title</code> | <code>Signer_phone_number</code> | <code>Signer_street</code> | <code>Signer_city</code> | <code>Signer_state</code> | <code>Supervisor_name</code> | <code>Supervisor_phone</code> | <code>Supervisor_email</code> | <code>reason</code> |
| 2 | csimmsdemo@gmail.com | Conrad Simms | Manager | 555-5555 | 345 Park Ave | San Jose | CA | | | | |
| 3 | demo@email.domain | Demo account | Manager | 777-7777 | 345 Park Ave | San Jose | CA | | | | |
| 4 | | | | | | | | | | | |
| 5 | | | | | | | | | | | |
| 6 | | | | | | | | | | | |
| 7 | | | | | | | | | | | |

PART 3

Send out for signatures with Mega Sign

1. Log into your Adobe Sign account.
2. From your Home screen, click **Send in Bulk with Mega Sign**.
3. On the Mega Sign send page, click the **Import Recipients and Merge Fields from File** link to use your CSV for sending.

The screenshot shows the Mega Sign interface. At the top, it says "Mega Sign" and "Send the same document to many recipients. Type in their email addresses or upload a CSV file with signer-specific data. Every signer will receive their own copy of the document." Below this, there is a "To:" field with a placeholder "Enter or paste email addresses" and a "Show Cc" link. A blue link "Import Recipients and Merge Fields from File" is visible. There is a checkbox "I need to sign". Below the "To:" field, there is an "Agreement Name:" field and a "Message:" field. The "Message:" field contains the text "Please review and sign this document" and is highlighted with a red oval. To the right, there is a modal window titled "To:" with a "Show Cc" link. It contains the text "Select the CSV file containing your Recipient List and Merge Fields. Download a [sample CSV file](#), or learn more about [Merge Fields](#) (PDF)." and two buttons: "Upload" and "OR Manually Enter Recipients List". There is also a checkbox "I need to sign" at the bottom of the modal.

4. In the resulting box, click **Upload** and select the CSV file created in Part 2.
5. Before continuing, configure the other options as desired:
 - Identity verification:** Set this to apply a second-factor authentication for your signers. Please refer to your agency's requirements or talk to your IT team for guidance. You can find [more information here](#).
 - I need to sign:** Check this box if you (the sender) need to counter-sign the documents once they've been submitted.
 - Agreement Name:** Enter the name of the agreement you're sending out. In this case, we'll enter "Altura University Policy Acknowledgement Form".
 - Message:** The global message that is included in the email notification sent to the signers if no custom message has been included in your CSV file.
6. At the bottom of the page, you'll see a place to upload a document to be sent for signature — this document is what we created in Part 1 and saved to our library. Click **Select from Document Library** and select the Altura University Policy Acknowledgement template that we created a few steps ago.

Mega Sign

Send the same document to many recipients. Type in their email addresses or upload a CSV file with signer-specific data. Every signer will receive their own copy of the document.

To:

Show Cc

Addresses imported successfully.

MegaSign-Example.csv

Upload complete.

☐ I need to sign

Agreement Name:

Altura University Policy Acknowledgment Form

Message:

Please review and complete Altura University Policy Acknowledgment.

Language:

English: US

Altura University Policy Acknowledgment Form

From the Document Library.

Drag more files here

Upload

OR Select from: Document Library | Google Drive

More

Email delivery (default)

Email delivery plus -

☒ Password

☐ Knowledge based authentication

Confirm Password:

Send Options

☐ Set password to open signed PDF

☒ Preview, position signatures or add form fields

Next

7. If you check **Preview, position signatures or add form fields** you will find yourself back in the authoring environment. This is a good step to take in order to verify the document template is set up, but we already added all necessary form fields earlier when building the template.
8. Click **Next**.
9. Verify that your form looks correct, then click the blue **Send** button in the lower right corner.

Congratulations! Your document has successfully been sent out to collect signatures from all the individuals included in your CSV file. Each person will get their own unique copy of the document, and when they sign and return the form, it will appear in the Mega Sign category of your Manage tab.

Adobe Sign

HomeSendManageReportsAccount

Jennifer

STATUS

In Progress (1)

Waiting for You (0)

Completed

Canceled

Expired

Draft

Templates

Web Forms

Mega Sign

Switch to Classic Experience

Filters

Search for agreements and users...

Mega Sign

| TITLE | STATUS | MODIFIED |
|--|-------------------|-----------|
| Altura University Policy Acknowledgment Form | Out for Signature | 4/28/2020 |

Altura University Policy Acknowledgment Form

Created Apr 28, 2020 12:46 PM

From: JenniferAdobeSign@gmail.com

Status: Out for Signature

Message: Please review and complete Altura University Policy Acknowledgment.

Actions

Open Mega Sign

Remind

Download PDF

Download Form Field Data

Download Individual Files (1)

See 4 more

Agreements

0 All

0 In Progress

0 Completed