



CREATING A CLIENT INTAKE FORM

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Steps

1. Word Version
2. Convert to PDF
3. Make Fillable
4. Clean Up Fillable Fields

24 FILLABLE PDF FORMS

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

DRAFTING THE BACKGROUND FORM

You first need to create the background form by either (1) creating it in a program like Microsoft Word or Publisher and saving it as a PDF, or (2) scanning it and saving it as a PDF.

You will get a much cleaner and crisper quality document if it is re-created electronically in Word or Publisher and then you print/save it as a PDF.

Once you have the underlying document converted to PDF, you will be ready to add the form fields in Adobe Acrobat.

RUN FORM FIELD RECOGNITION

Acrobat XI

1. Click **Tools button** → **Forms** → **Create**.
2. In the next dialog, choose **Use an existing file** or **Scan a paper form** → **Next**.
3. If you choose "Use an existing file", the next dialog will ask you whether you want to use the current document or import a file. Choose **Use current document** → **Next**.
4. Your form should now be fillable.
5. This process will find most text fields on your form. If it doesn't you can add fields yourself.
6. Once your form has been "recognized," click the **Preview button** to see how it looks and test it. To go back to edit mode, just click the **Edit Layout button**.

Acrobat DC

Open the form you want to make fillable and open the **Prepare Form tool**, then click on the **Start button**. That's it. Once your form has been "recognized," click the **Preview button** to see how it looks and test it. To go back to edit mode, just click the **Edit Layout button**.

CLEAN UP THE FORM

Fix Check Boxes

The form wizard will locate check boxes on a form and make them fields. However, they are usually set up as separate fields which means you can check them all at once. That may be fine in some cases, but other times the options are mutually exclusive. For example, if you had a section of your form that looks like the following, you wouldn't want users to have the option of checking both boxes:



FIGURE 24-1

In the example above, the foregoing boxes were recognized by the form wizard as separate check boxes so the user would be able to check both of them. To eliminate this as a possibility:

1. Remove the Existing Client field by clicking on it, then hitting your delete key.
2. First, zoom in so you can better see what you're doing. Double click the New Client field to get to its properties.
3. Click on the **Options tab** and switch the **Check Box Style** from square (unless you like that) to Check; and change the Export Value from "on" to "True."

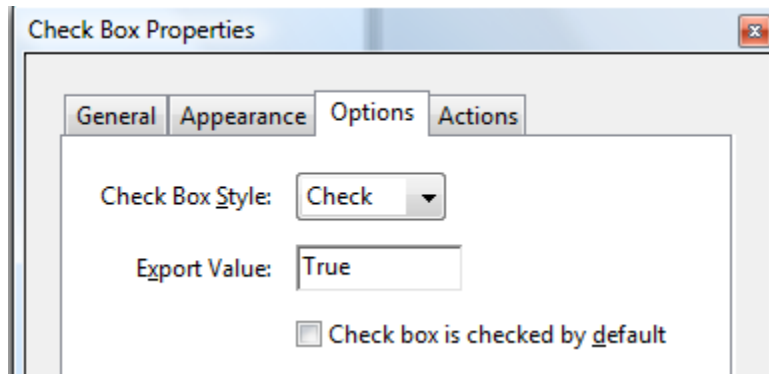


FIGURE 24-2

4. Under the **Appearance tab**, change the Border Color and Fill Color to "no color."

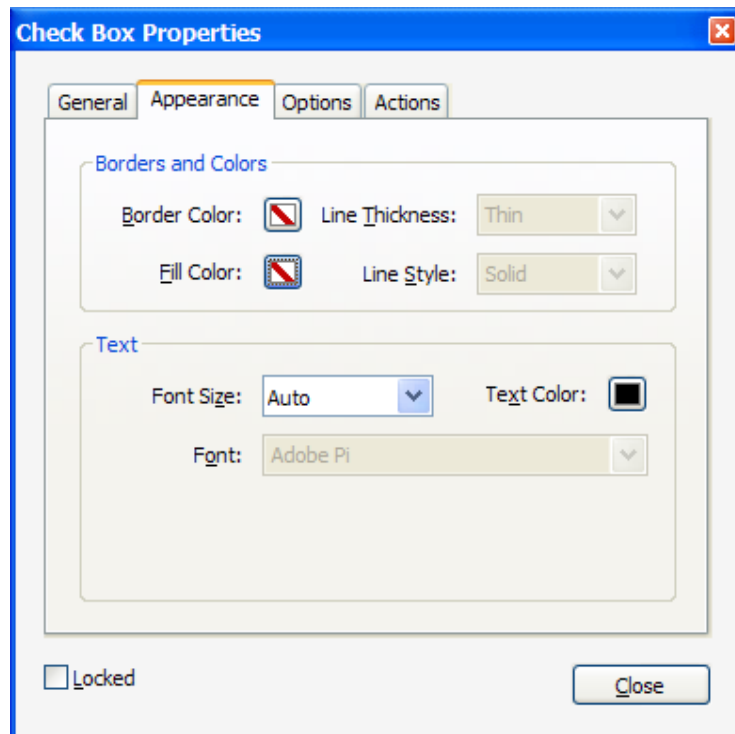


FIGURE 24-3

5. Click the Close button at the bottom.
6. Next, change the field dimensions so it evenly overlaps the borders of the checkbox. It would go from this:



FIGURE 24-4

To this:



FIGURE 24-5

7. Now click on the field you just modified and hit **Ctrl + C** (copy) then **Ctrl + V** (paste). Somewhere on the screen, a duplicate of the New Client field will appear. Drag it over the Existing Client checkbox.
8. Double click the 2nd field to get to the Properties dialog. Click the **Options tab** and change the **Export Value** to false.
9. Now Click the Preview button at the top left corner of the screen and test the boxes to make sure they're mutually exclusive.

Fix Tab Order

The Tab Order is the sequence in which your cursor moves from field to field when you hit the tab key on your keyboard. Manually adding fields like we did in the preceding step can mess this up. In order to fix it in Acrobat XI:

1. First click the **Forms menu** → **Edit Fields** → **Show Tab Numbers**.

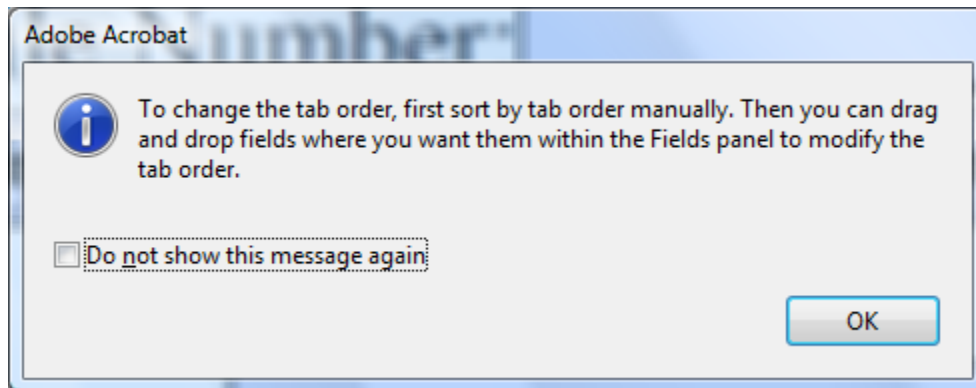


FIGURE 24-6

2. Click **OK**. On the left side of your screen, the fields appear in the tab order. If you want to change it, just drag a field to another location from top to bottom and you'll see that its tab number will change appropriately.

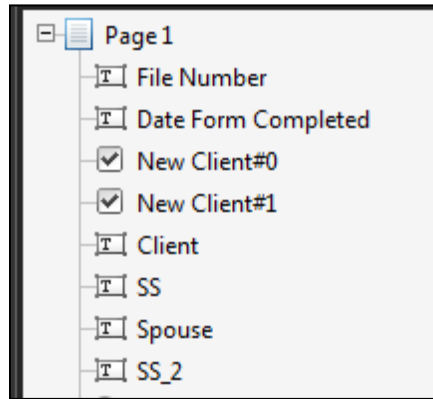


FIGURE 24-7

In Acrobat DC:

1. Expand the Tools Pane.
2. Drag and drop the fields to change the tab order.

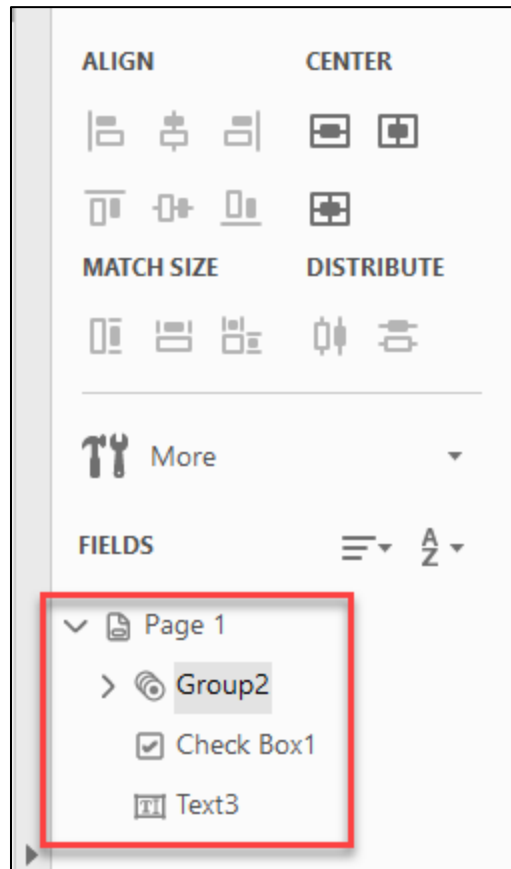


FIGURE 24-8

Format Fields Properly

Acrobat will not guess exactly how you want things formatted. Scan your form and if you see a field that needs to have specific formatting, double click it, click the Format tab and make the appropriate adjustment.

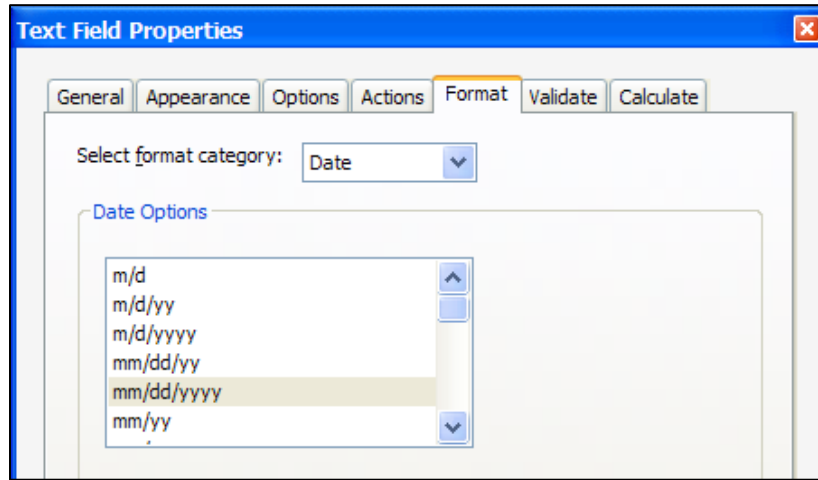


FIGURE 24-9

Name Fields Properly

Acrobat looks at the text of the form to guess what fields should be called and it isn't always right. If you see any fields that do not have useful names, double click them and rename as appropriate.

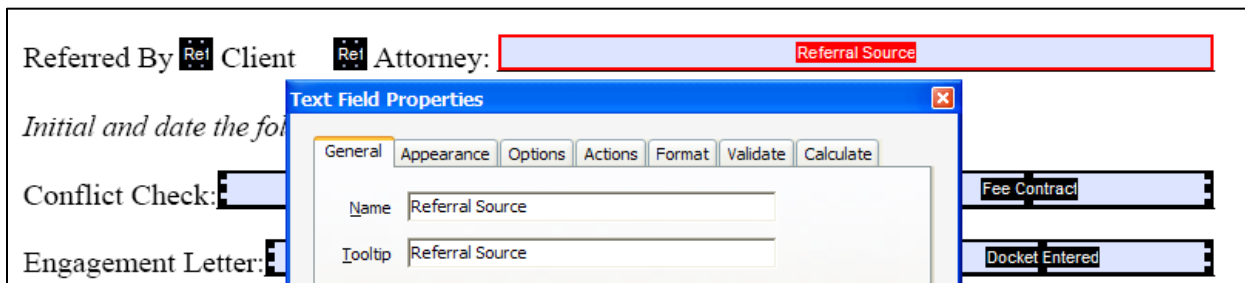


FIGURE 24-10

ADD SAVE FUNCTIONALITY IN ACROBAT READER

IMPORTANT – Unless you "distribute" the form as indicated below (which often times isn't desirable), you must embed save rights (or "extend" save rights) into the PDF. If you do not, your users trying to fill out the form in Reader (like your clients, etc.) will receive this error:

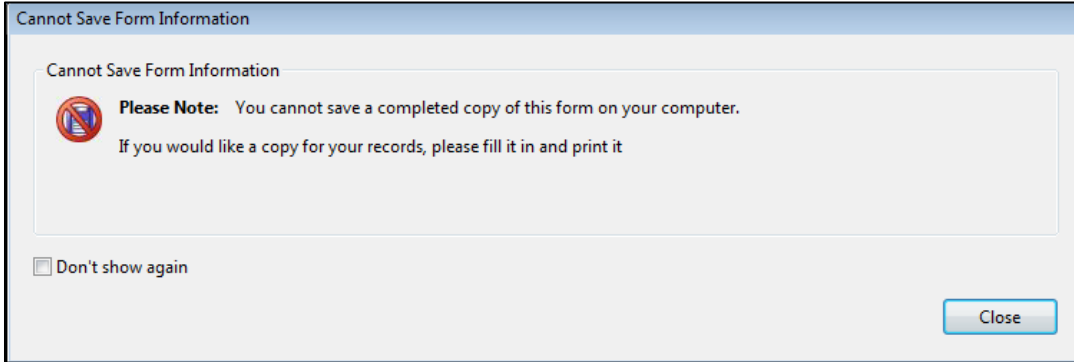


FIGURE 24-11

To "extend" save rights, select **File** ➔ **Save As (X1)** or **Save as Other (DC)** ➔ **Reader Extended PDF** ➔ **Enable Additional Features**.

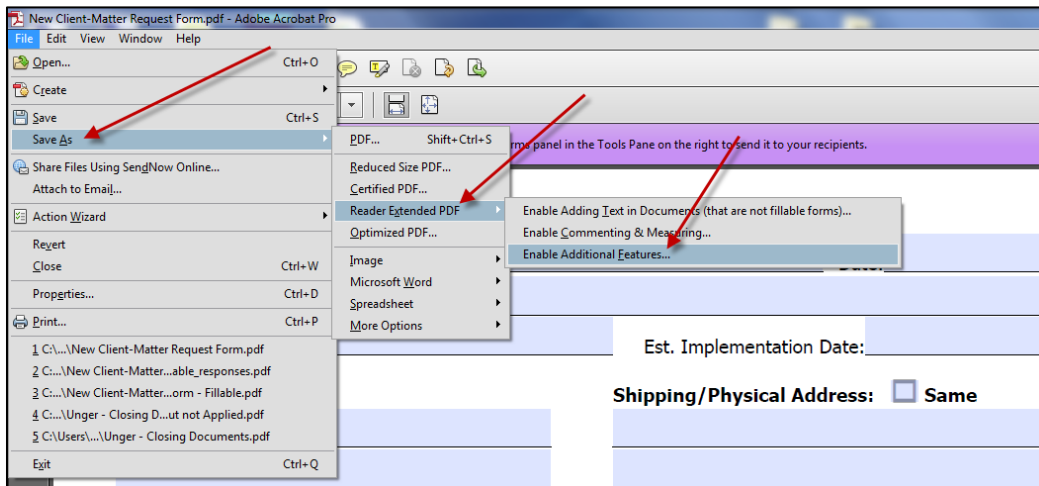


FIGURE 24-12

You will receive the following confirmation:

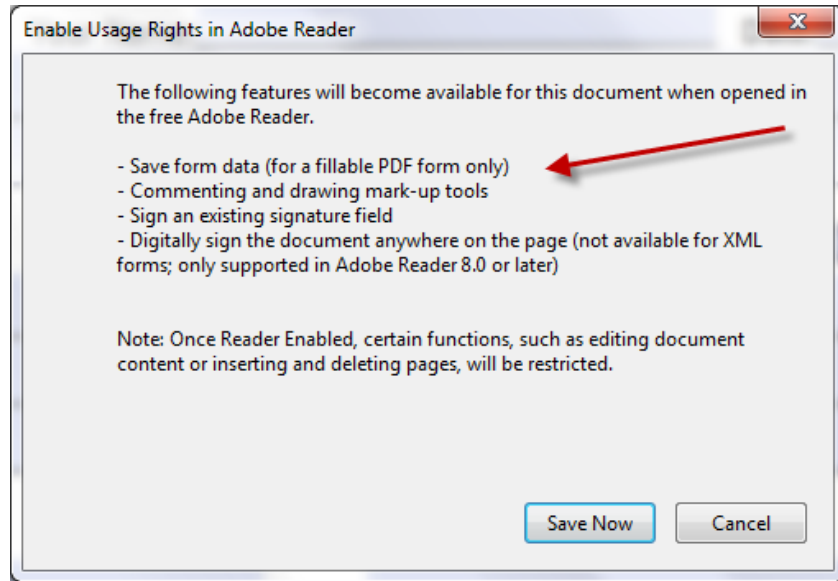


FIGURE 24-13

ADD A SUBMIT BUTTON TO YOUR FORM

Your form can be distributed to recipients via email and the answers they supply to the form can be emailed back to you (rather than the form itself). Once you receive the answers, the form can be re-assembled and Acrobat will even store the information you receive in a database. To create the submit button, follow these steps:

1. Add a new field.
 - **Acrobat XI:** Click **Add New Field** under **Tasks** (right side of screen) → **Button**.
 - **Acrobat DC:** Click on the **Button** button on the **Prepare Form** toolbar.



FIGURE 24-14

- Now position the button where you'd like and name it:

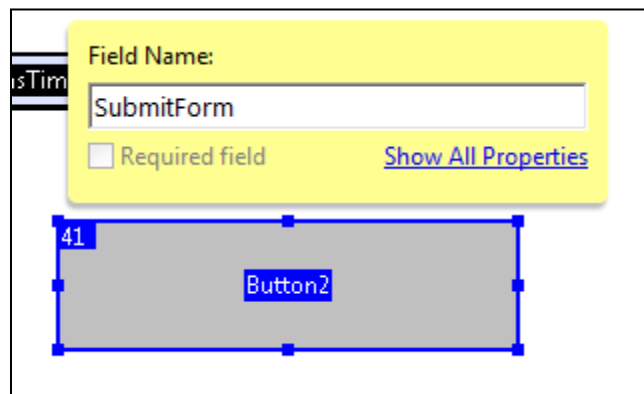


FIGURE 24-15

2. Double click the button you've made and the Button Properties dialog will appear. On the Appearance tab, I'd recommend the following settings:

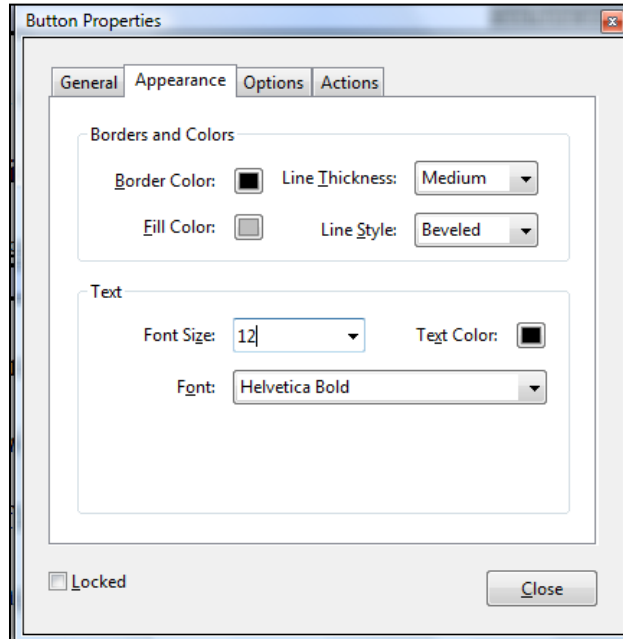


FIGURE 24-16

3. On the **Options** tab, give the button a **Label**.

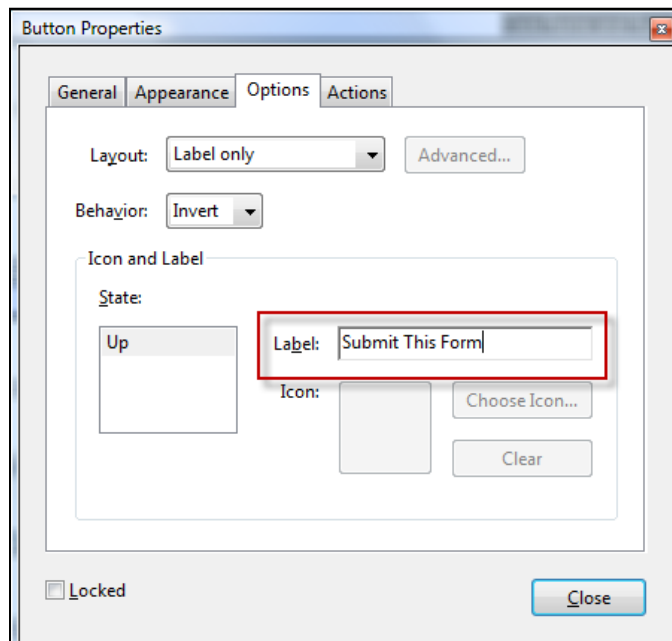


FIGURE 24-17

- On the **Actions** tab, select the **"Mouse Up"** trigger, select the **"Submit a form"** action and click the **Add** button.

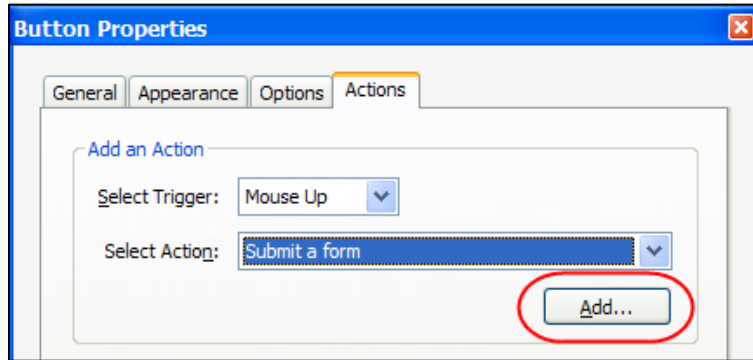


FIGURE 24-18

- When you click Add, you'll see the following dialog. In the top field, type `mailto:` and then your email address (no spaces). You might want to check the "convert dates to standard format" as well. If you want to make the incoming forms easy to deal with, then choose "PDF the complete document" below rather than "FDF Include" which is the default.

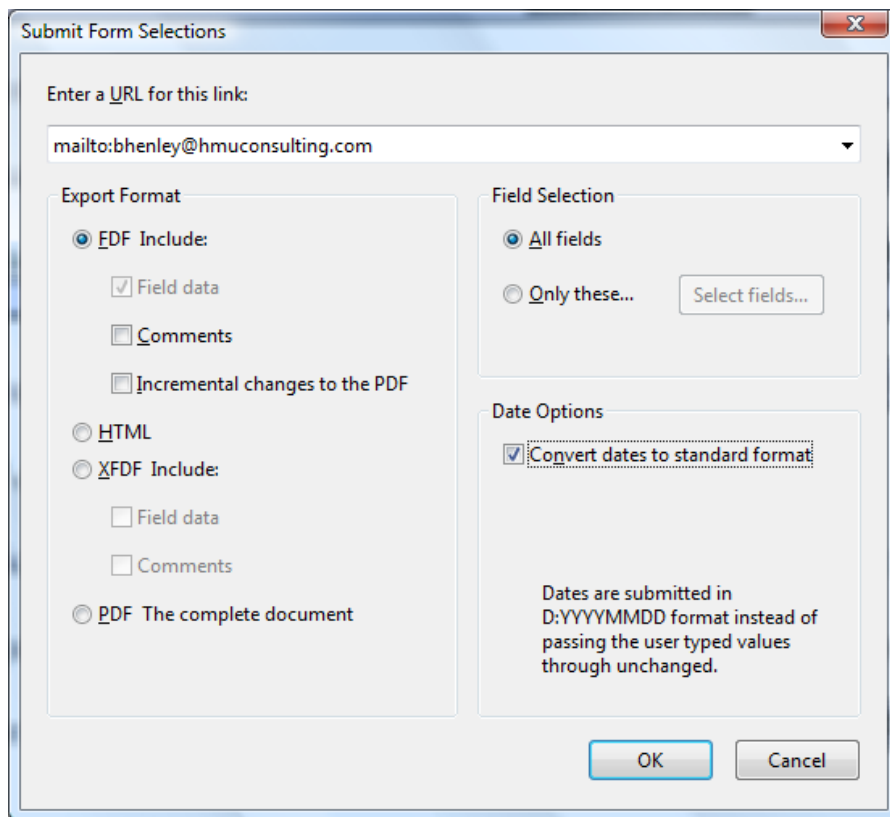


FIGURE 24-19

- Now click the **OK** button, then the **Close** button at the bottom of the dialog.
- Click the Preview button on the Forms toolbar to see how your form will look.

DISTRIBUTE YOUR FORM

Acrobat XI

1. Click the **Forms menu** ➔ **Distribute Form**. Now you'll see the following dialog. Under "**How do you want to collect...**", choose "**Manually collect...**" and click the **Next** button.

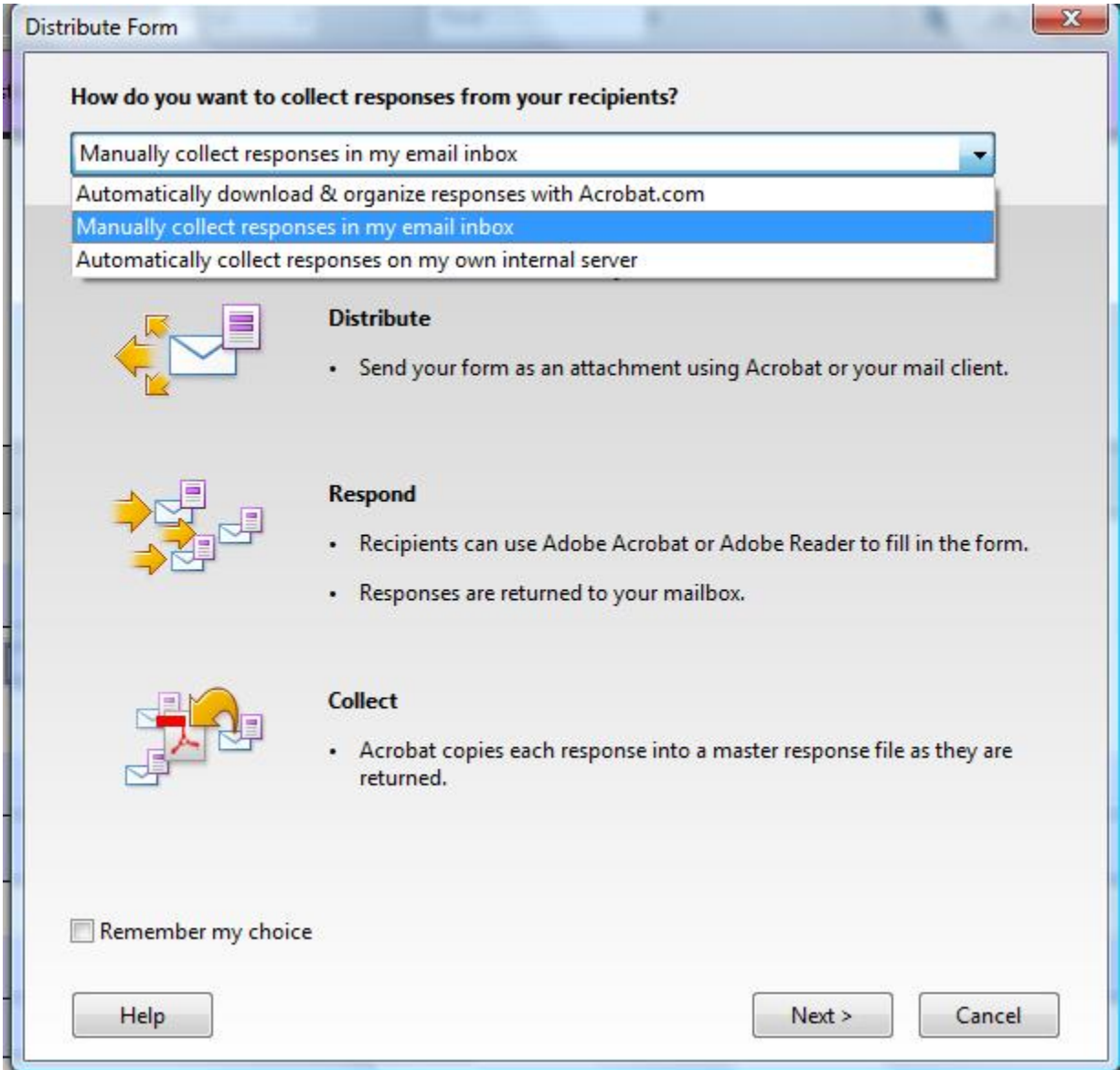


FIGURE 24-20

2. Follow the subsequent on-screen instructions to distribute your form. When the forms come back via email, they'll automatically compile themselves into a database Acrobat sets up for you.

Acrobat DC

1. Click the **Distribute** button at the bottom of the **Prepare Form** pane.

2. Choose **email** → **Continue button**.

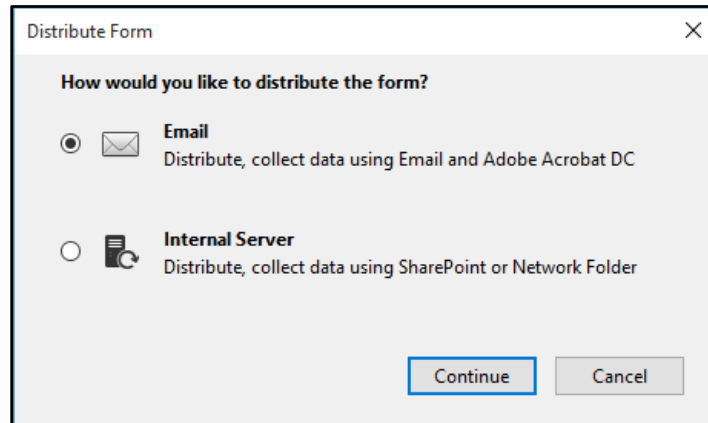


FIGURE 24-21

3. Next, determine how you want to distribute the form. You can send it using Adobe Acrobat DC or save a local copy and manually send it later.



THANK YOU!

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