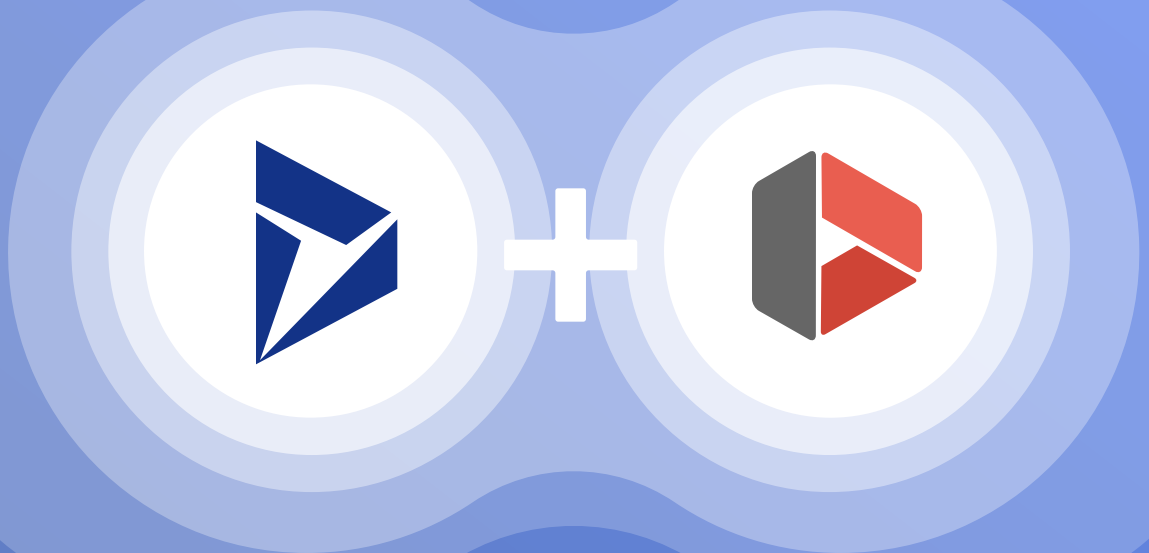




DaDaDocs



DaDaDocs for Dynamics 365

A Guidebook for the DaDaDocs Integration
for Dynamics 365

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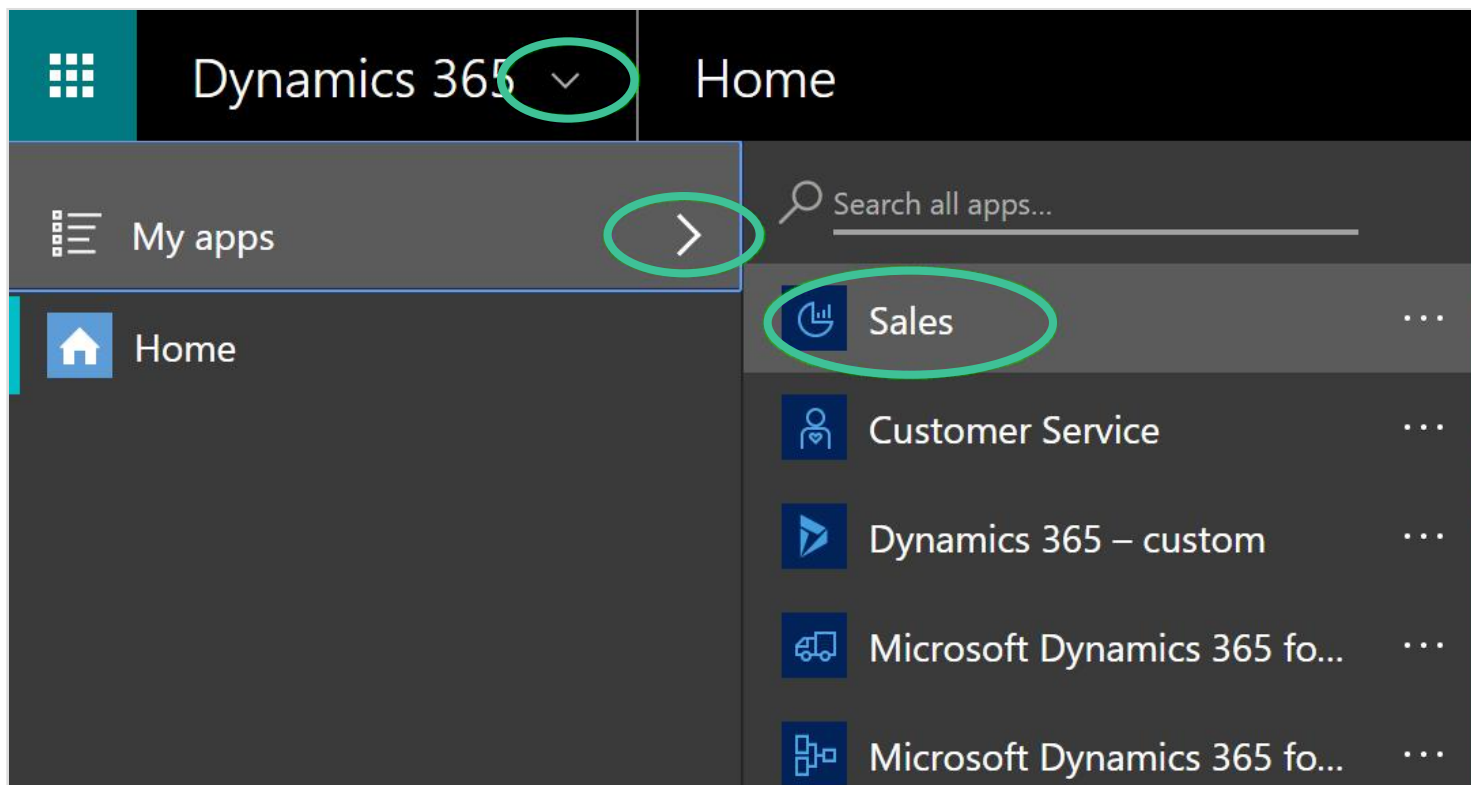
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DaDaDocs for Dynamics 365

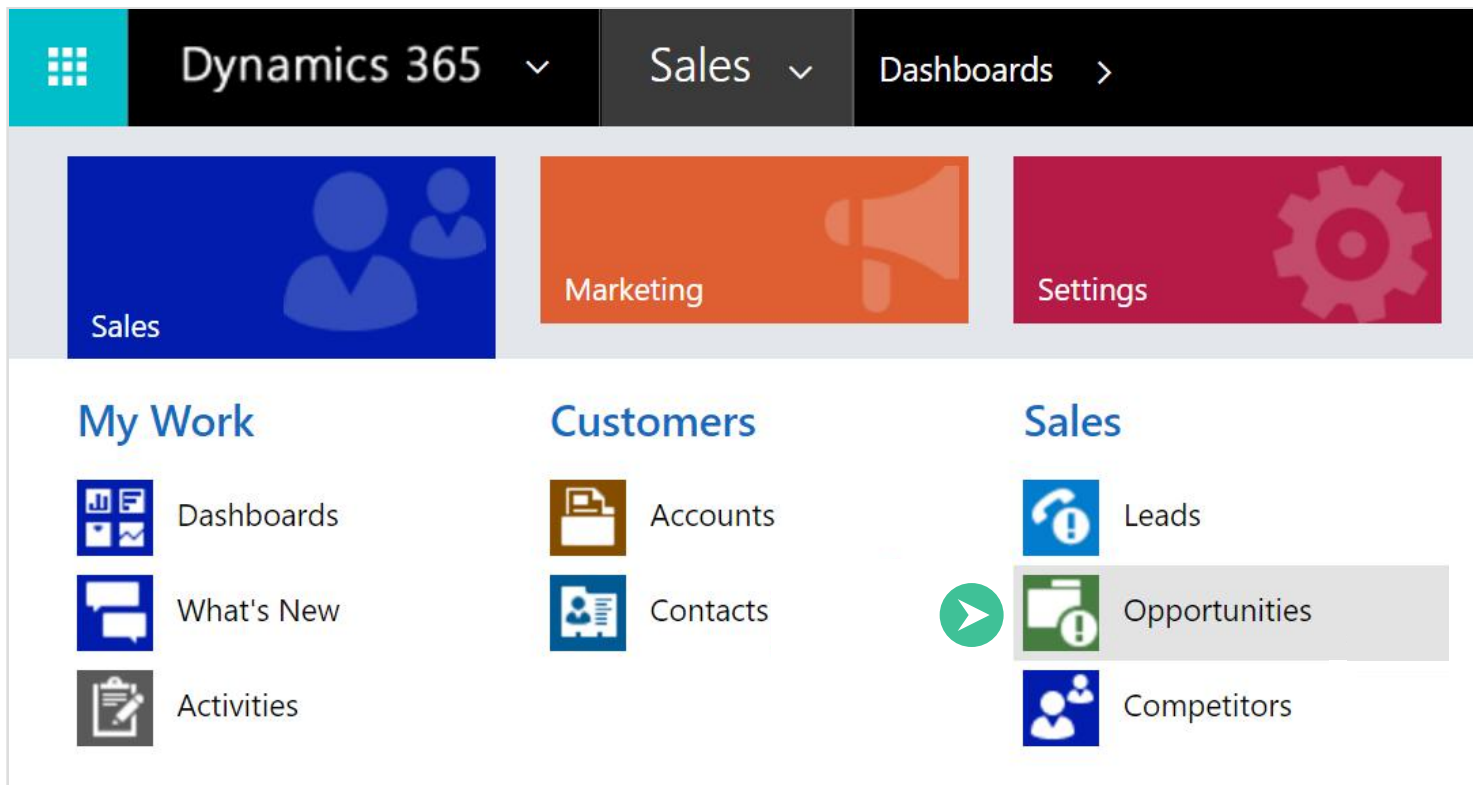
Using DaDaDocs for Dynamics 365, you can edit, annotate, sign PDF documents, request signatures and make documents available to anyone to fill out from any device. Apart from PDF, DaDaDocs supports .doc, .docx, .ppt and .pptx formats.

Getting Started

To get started, log in to your **Dynamics 365** account and select **Sales** in **My apps**.

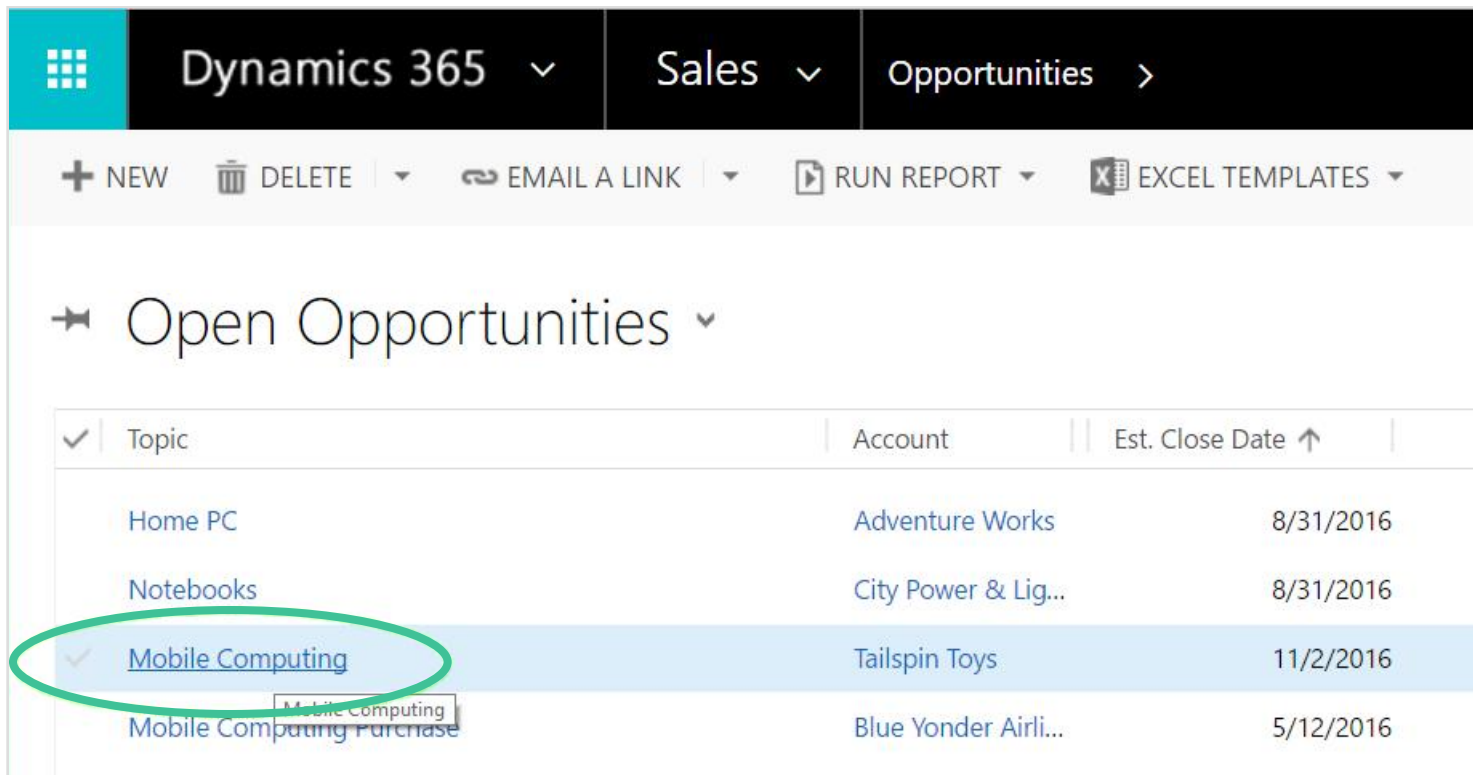


Then, click **Opportunities**.



The screenshot shows the Dynamics 365 Sales dashboard. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Dashboards'. Below this, there are three main sections: 'Sales', 'Marketing', and 'Settings'. The 'Sales' section is expanded to show 'My Work', 'Customers', and 'Sales' sub-sections. In the 'Sales' sub-section, the 'Opportunities' link is highlighted with a green circle and a play button icon.

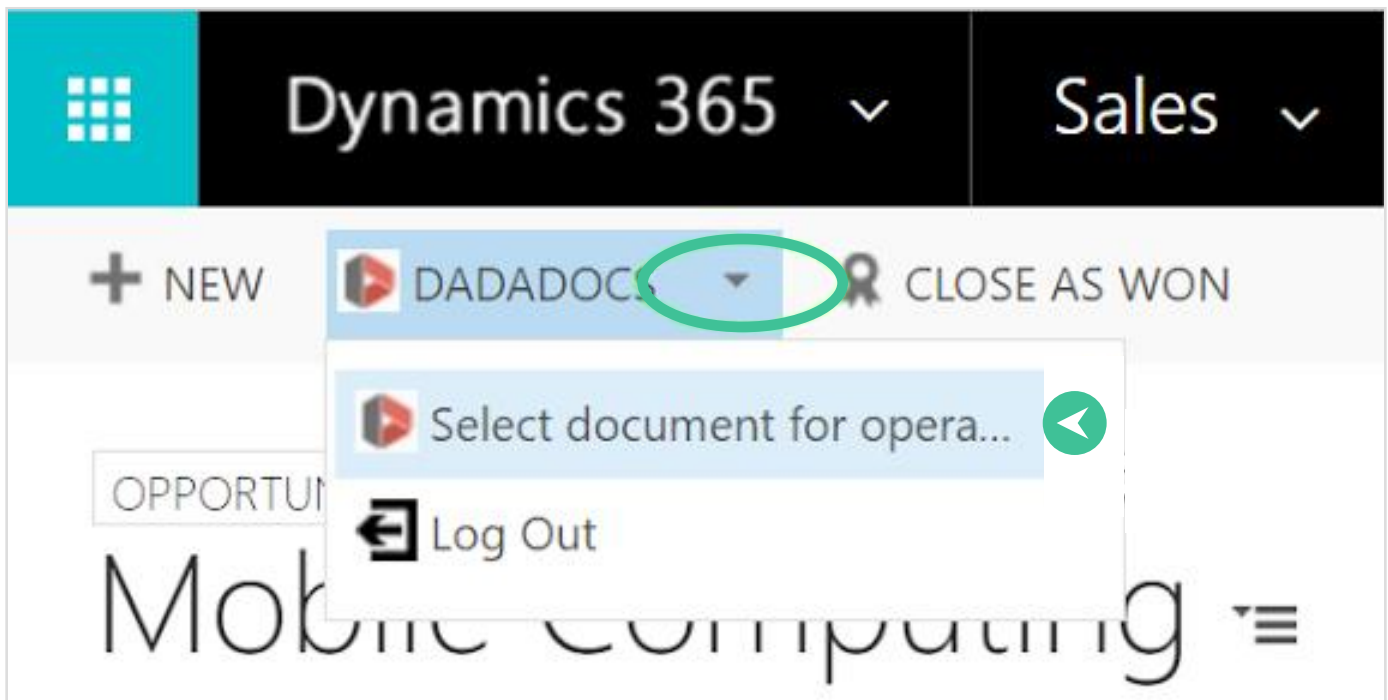
Select the opportunity you need.



The screenshot shows the Dynamics 365 Sales Opportunities page. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Opportunities'. Below this, there are several action buttons: '+ NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', and 'EXCEL TEMPLATES'. The main content area is titled 'Open Opportunities' and displays a table of opportunities.








Topic	Account	Est. Close Date
Home PC	Adventure Works	8/31/2016
Notebooks	City Power & Lig...	8/31/2016
Mobile Computing	Tailspin Toys	11/2/2016
Mobile Computing Purchase	Blue Yonder Airli...	5/12/2016

Open the DaDaDocs menu and click **Select document for operation**.



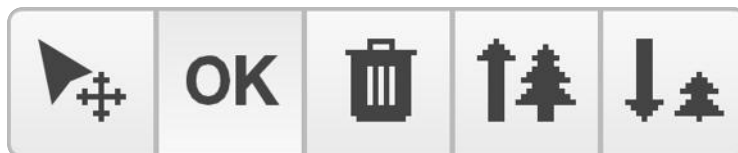
A list of documents attached to your Notes will open. Select the document you would like to edit and press **Edit Document**.

Documents

Template Name	Last Modified Date	
 Document_1	05.04.2017 11:00:34	
 Sample_document	05.04.2017 10:58:34	
 Employment	05.04.2017 10:56:34	

Mini Toolbar

The mini toolbar appears above any content you add to the document including text, checkmarks, pictures, etc.



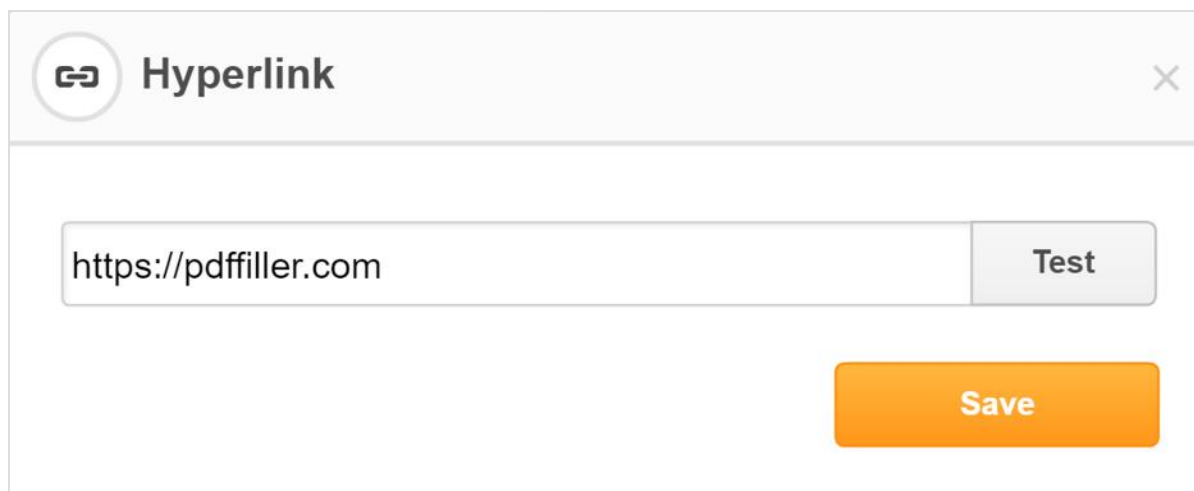
To change the position of the content, click the arrow icon, then while holding down the mouse button, drag the content where you need to place it. **OK** confirms your action and activates the **Text** tool. To resize the content, use the tree icons. To delete content, click the trash can icon.

Hyperlink Tool

Any content that you add to a document including text, checkmarks, signatures, sticky notes etc. can be linked to any webpage.

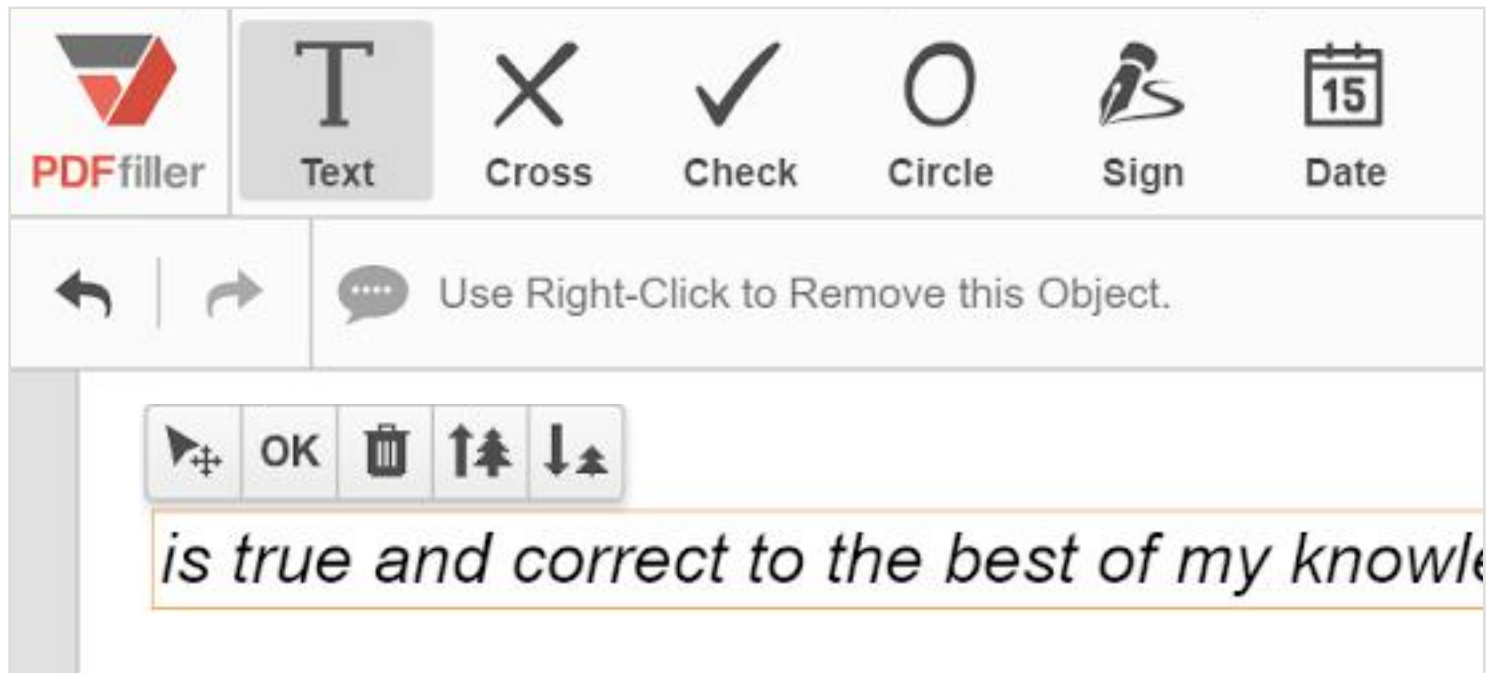


Click the **Hyperlink** button and in the dialog window that will open next, type the URL of the web page and click Save.

A screenshot of a dialog window titled 'Hyperlink'. The window has a title bar with a chain link icon on the left and a close button (X) on the right. Below the title bar is a text input field containing the URL 'https://pdffiller.com'. To the right of the input field is a 'Test' button. At the bottom right of the dialog is a large orange 'Save' button.

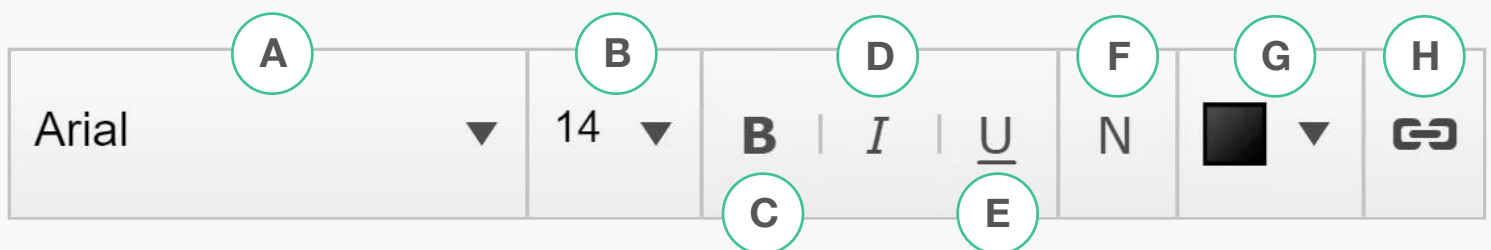
Text

When you open a document, the Text tool is active by default. Click where you want to add text and start typing



To adjust the position of the text, use the mini toolbar.

To format text, use this toolbar.



A. Change font

D. Italicize

G. Color

B. Change text size

E. Underline

H. Link text to a webpage

C. Apply bold formatting

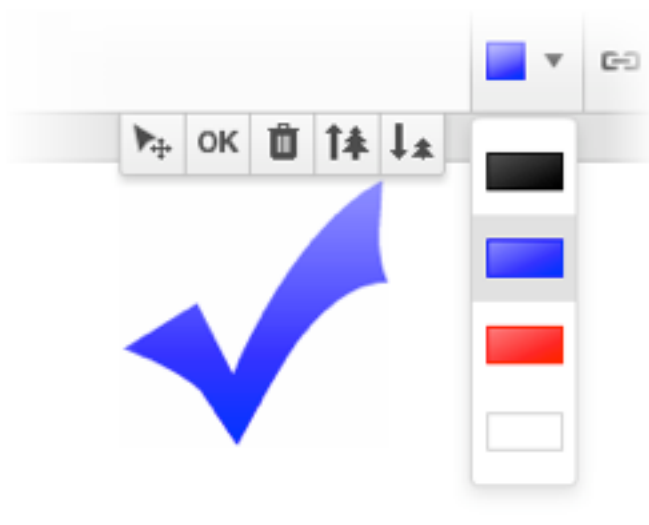
F. Normal / change font

Checkmarks

You can add a check to a box with a simple checkmark, X-mark or a circle. Select the respective icon in the main toolbar and click where you'd like to place it.



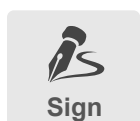
To change the color of the checkmark, click the color box and select the color you need.



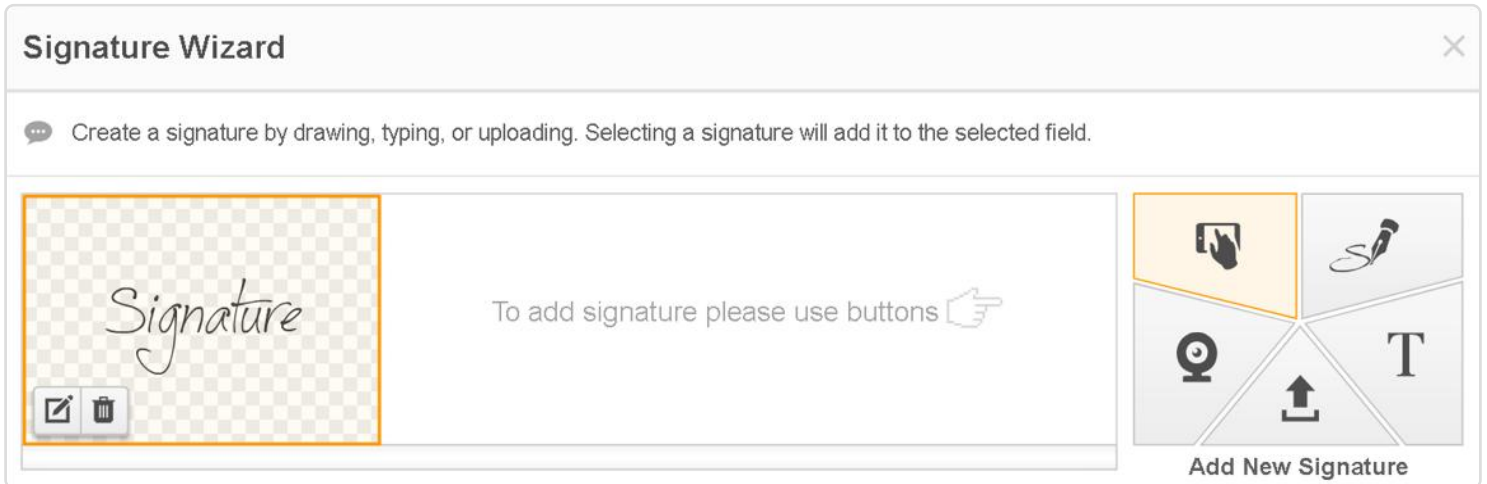
You can also use checkmarks as an annotation tool or as bullet points.

Signing Documents

Create legally binding eSignatures faster than ever before.

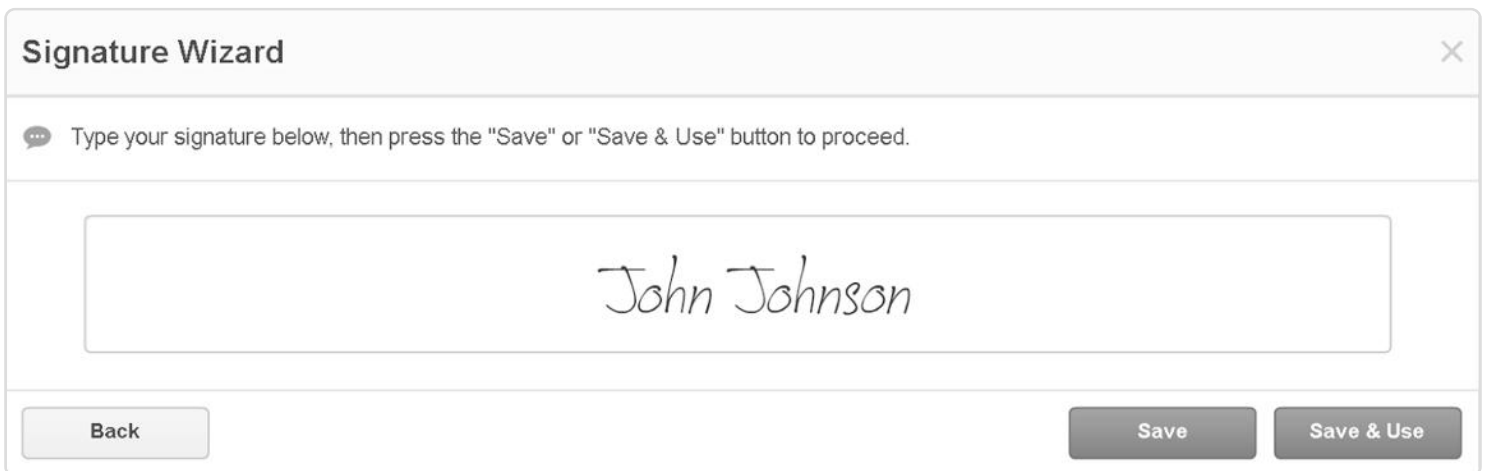


Click the **Sign** icon in the main toolbar to open the Signature Wizard that allows you to type, draw, upload, capture a signature with a webcam or sign the document on a mobile device.



Typing a Signature

You can add a check to a box with a simple checkmark, X-mark or a circle. Select the respective icon in the main toolbar and click where you'd like to place it.

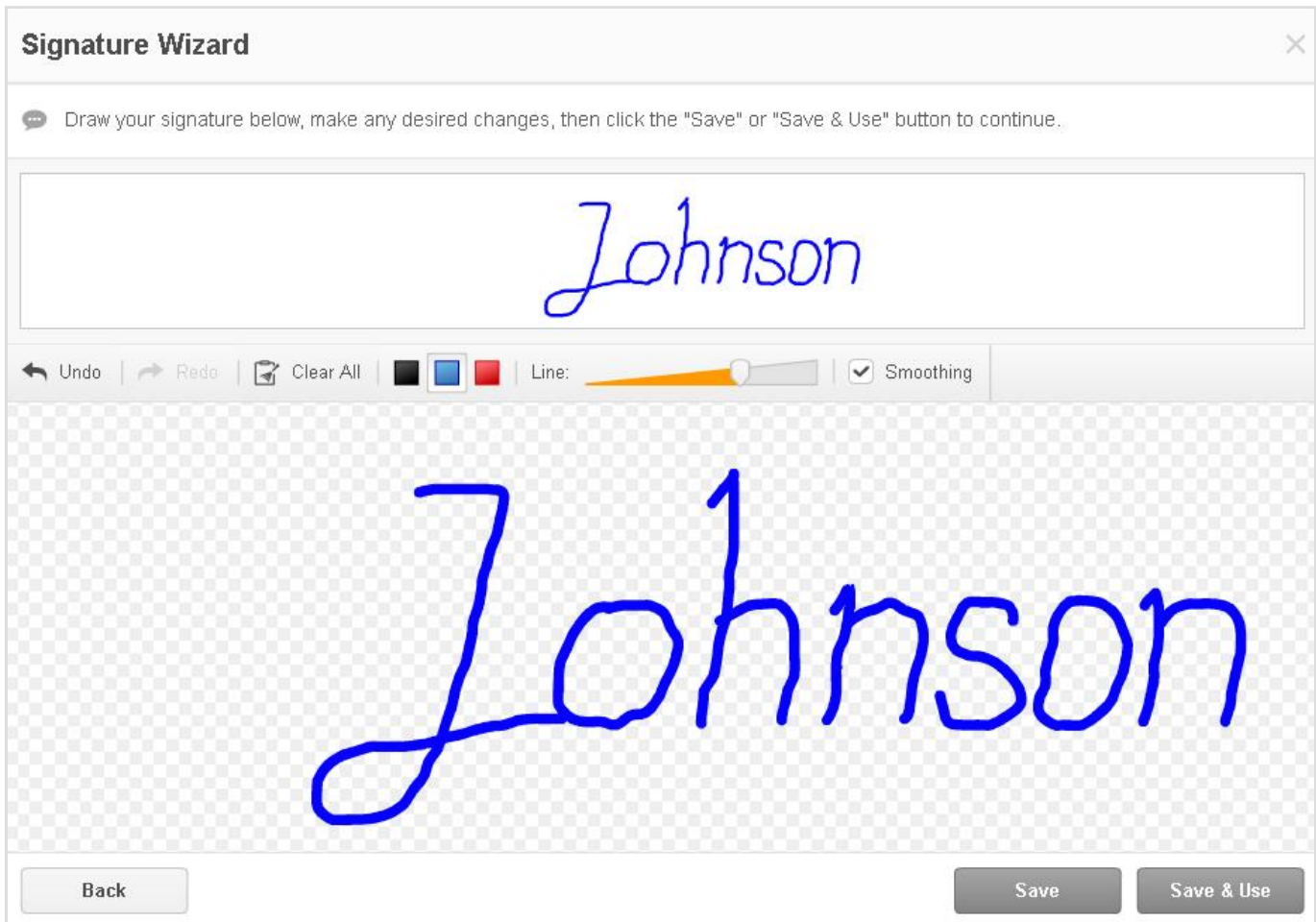


Click where you need to place the signature. Use the mini toolbar to resize the signature or change its position.



Drawing a Signature

To draw a signature, click the fountain pen icon and use your mouse or trackpad to draw your signature by clicking and dragging. You can also change the color and thickness of the signature.



Save and place the signature exactly where you want it to appear.



Uploading a Signature

Click the **Upload** icon and select a photo of your signature stored on your local drive. The Signature Wizard processes the image, opens it and allows you to use the signature as-is or enhance it.

You can crop, rotate and flip the signature, change its background color, and adjust the brightness and contrast.

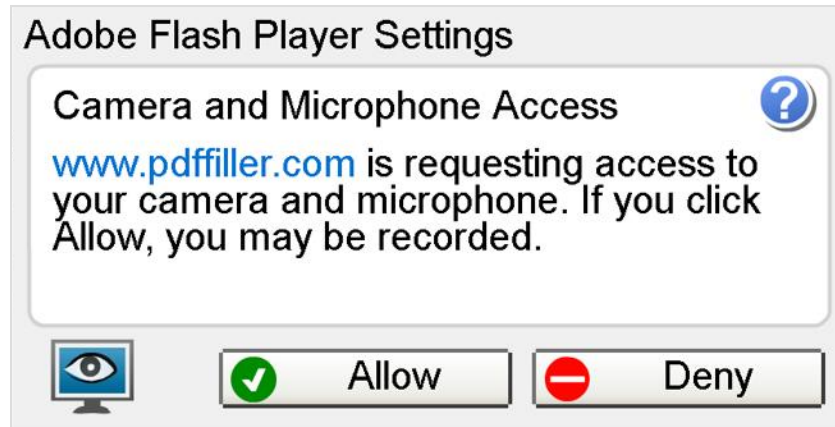


Click **Save & Use** and place your signature where it should go in the document.

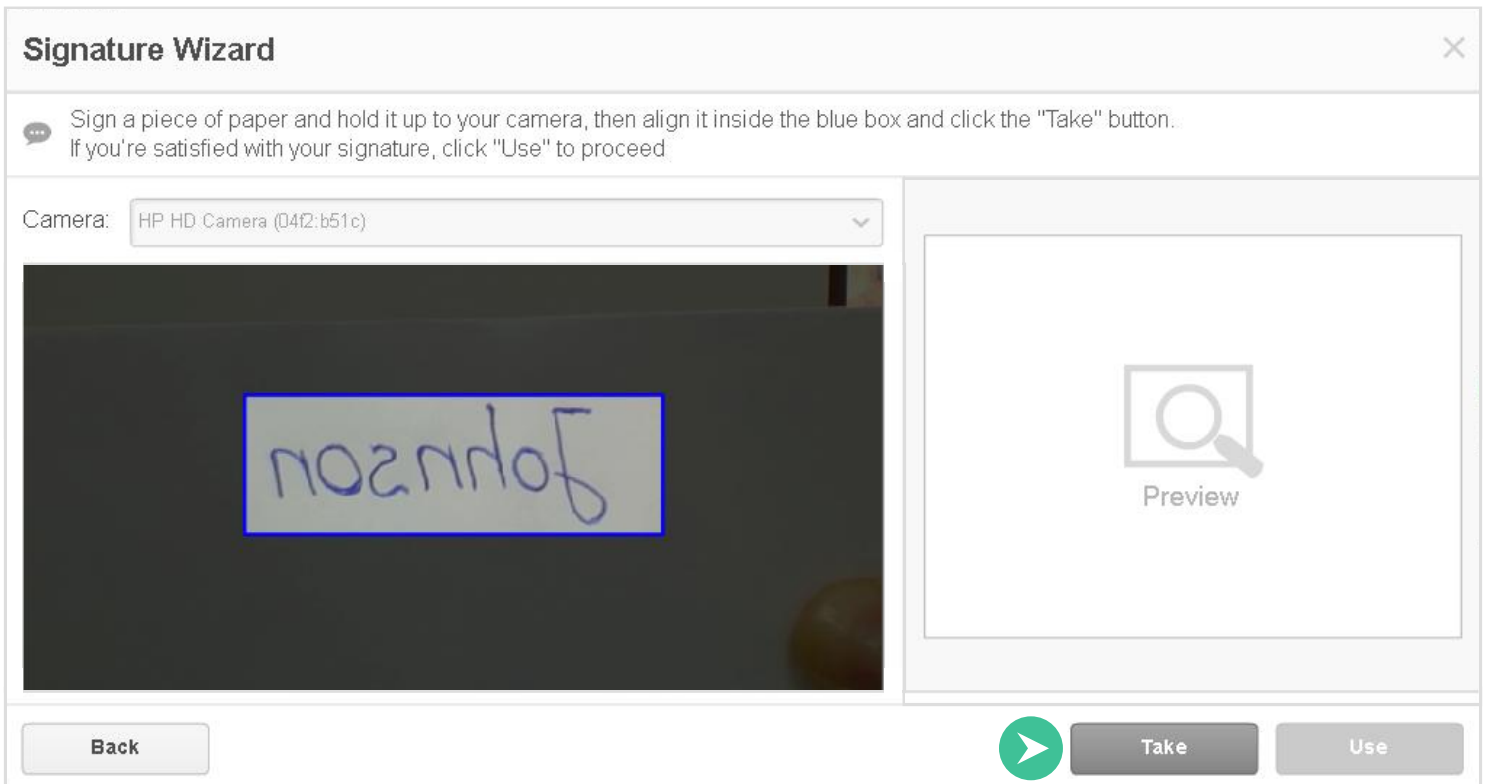
Real Signature with a Photo

Make it easy to add a legally binding signature to a document by capturing a handwritten signature with a webcam.

Click the webcam icon and allow DaDaDocs access to your camera.



Sign a piece of paper and hold it up to the camera so the signature fits inside the blue box then click **Take**.



Adding a Signature on Mobile

In the Signature Wizard, click the **Mobile Device** icon, enter your cell phone number and click send.

Signature Wizard [X]

Type your phone number or email address, then click the "Send" button.

SMS

Ex.: (999) 999-9999
*Country code is required for non-US customers.

Send

OR

EMAIL

Send a link to create a signature on your mobile device via email.

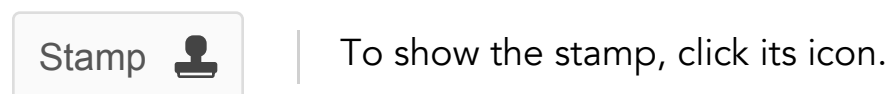
Use Email

Back

You will receive a text message with a link to the document. Open the document and sign it. Instead of SMS, you can also choose to send the link via email.

Verified by PDFfiller Stamp

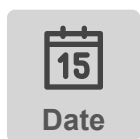
DaDaDocs verifies your signature with a stamp showing the date when you signed the document.



Legal in 50 States

All signatures added in DaDaDocs are legally binding in the United States under the E-Sign Act (2000).

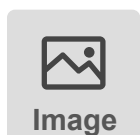
Adding the Date



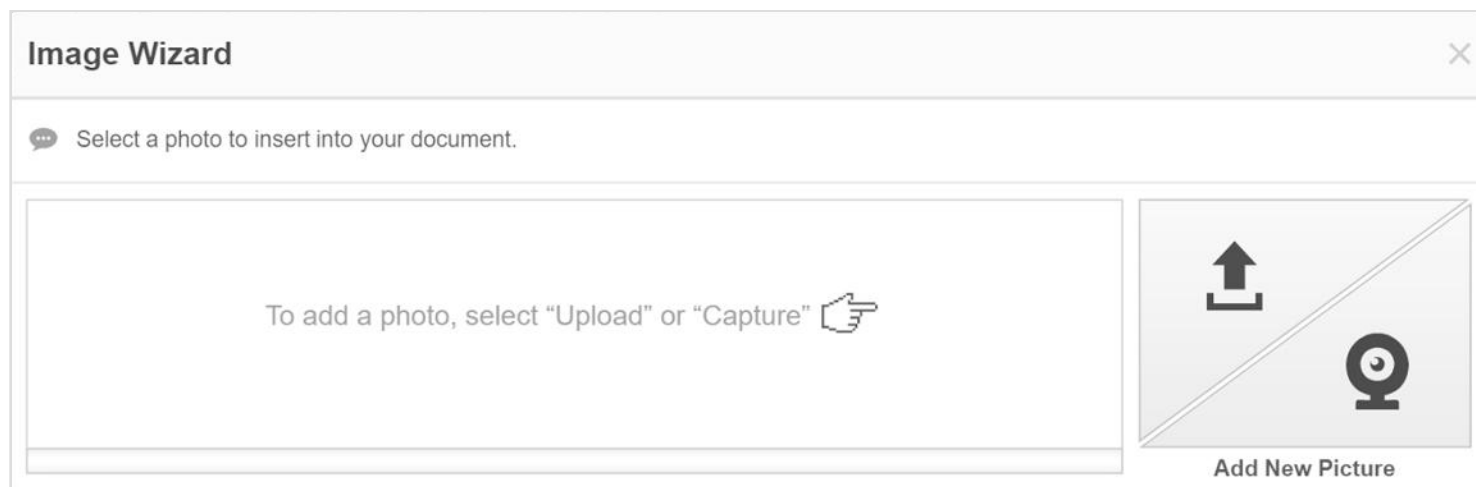
Select the Date icon in the main toolbar and click where you want to place the date. The current date appears by default. You can change it to any date you want.

Adding an Image

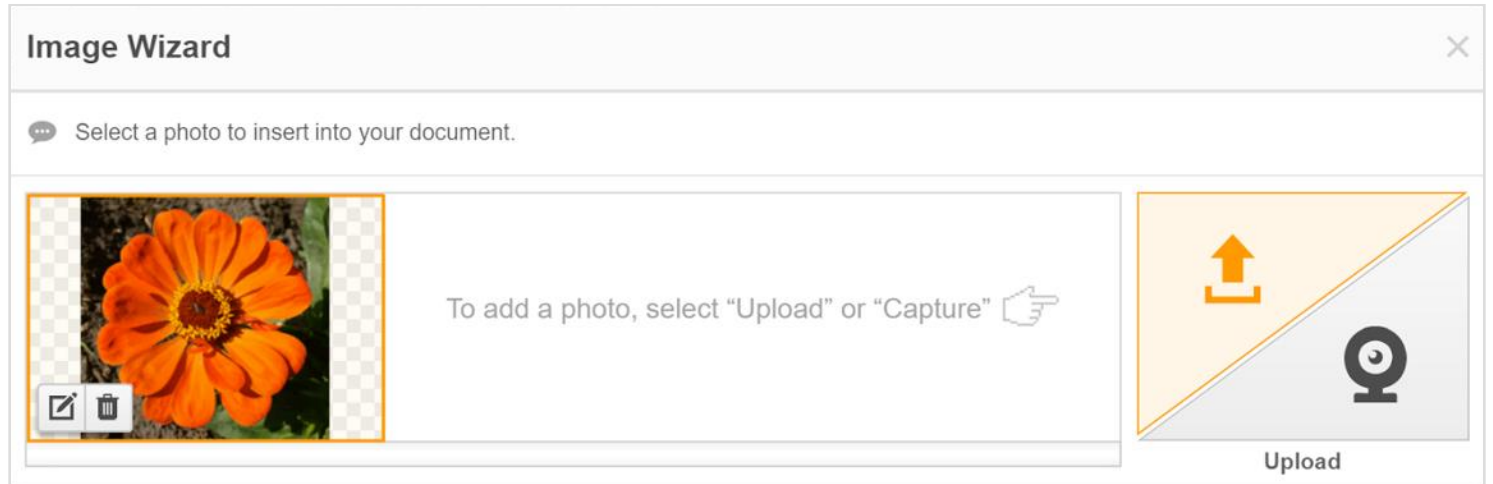
Enhance documents with images or pictures that have been uploaded or taken with a webcam.



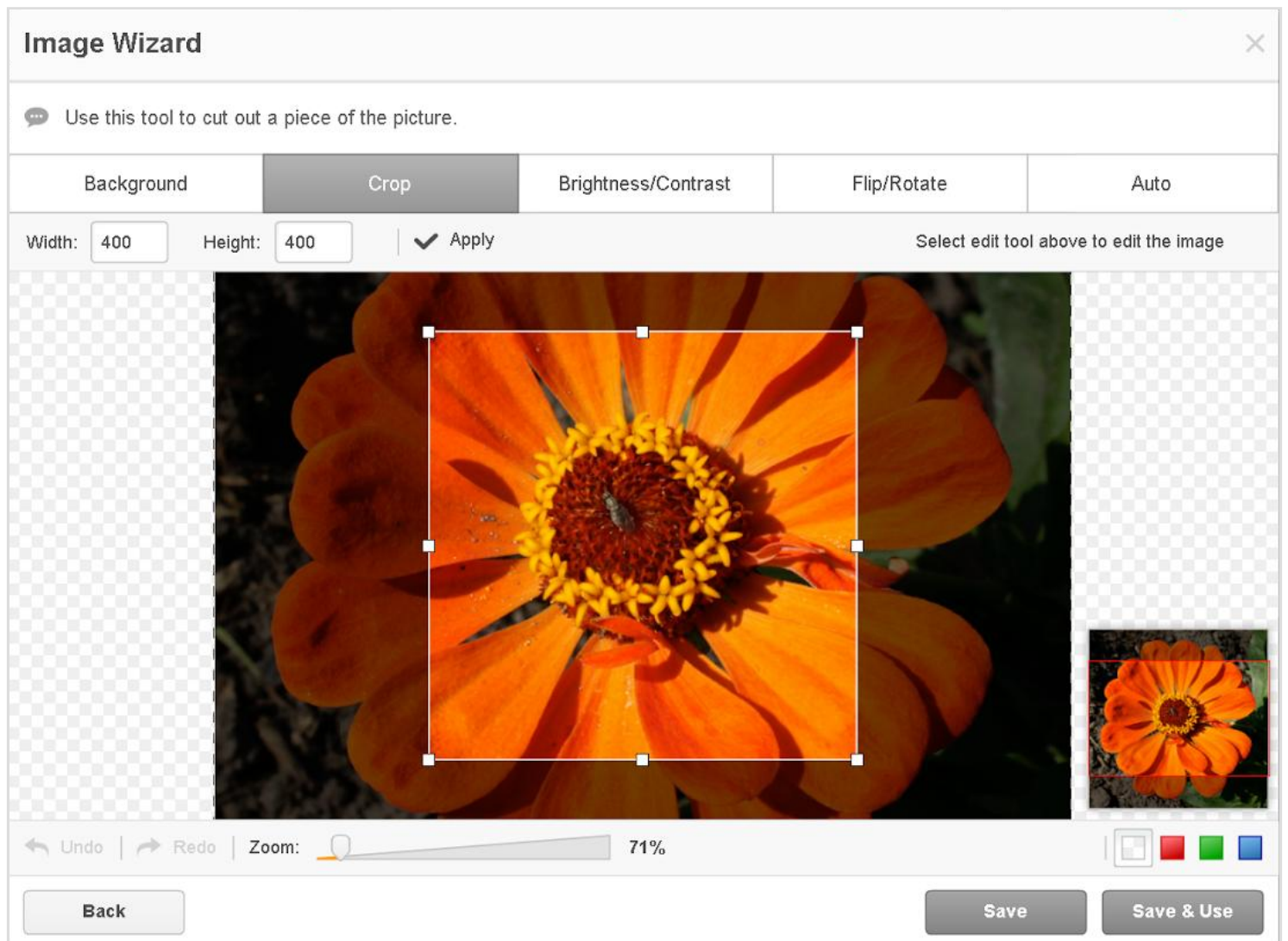
Select the **Picture** icon in the main toolbar to open the Image Wizard. You can either upload a picture that you already have or take a new one using your camera.



To upload a photo from your computer, click the **Upload** button.



Before inserting the image in the document, you can crop, rotate and flip it, change its background, and adjust its brightness and contrast.



To place the image in the document, just click on it in the **Image Wizard**. Move or resize it for a perfect fit using the mini toolbar.



You can also take a picture using your webcam and add it to the document. Select a photo size to the right of your camera image, click **Take**, then click **Use** to proceed.

Image Wizard

Select a photo size to the right of your camera image.
Click "Take" to take a photo, then click "Use" to proceed.

Camera: HP HD Camera (04f2.b51c)

Units: Inches

Full Size (5.1 X 3.9) inches
 US Passport (2 X 2) inches
 Custom Size: 1.7 x 1.3

Preview


Back Take Use


The window that will open next allows you to crop the image, adjust its brightness and contrast, flip and rotate it, or otherwise enhance it. After you've finished editing your picture, click **Save and Use** to add it to your document immediately or select **Save** to use the picture later.



Image Wizard ✕

Click on part of the photo to clear it. Use the slider to change the tolerance.

Background	Crop	Brightness/Contrast	Flip/Rotate	Auto
------------	------	---------------------	-------------	------

Tolerance:  49% Select edit tool above to edit the image



Undo | Redo | Zoom:  93% 

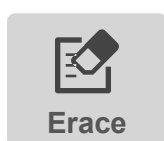
Back **Save** **Save & Use**

Erasing, Highlighting, Redacting and Drawing

Easily customize documents to fit your needs with a variety of tools.

Erasing

Erase any content from a PDF document quickly and precisely.

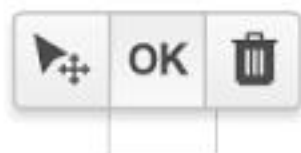


Clicking the **Erace** button will cause the eraser toolbar to appear under the editing tools.



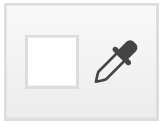
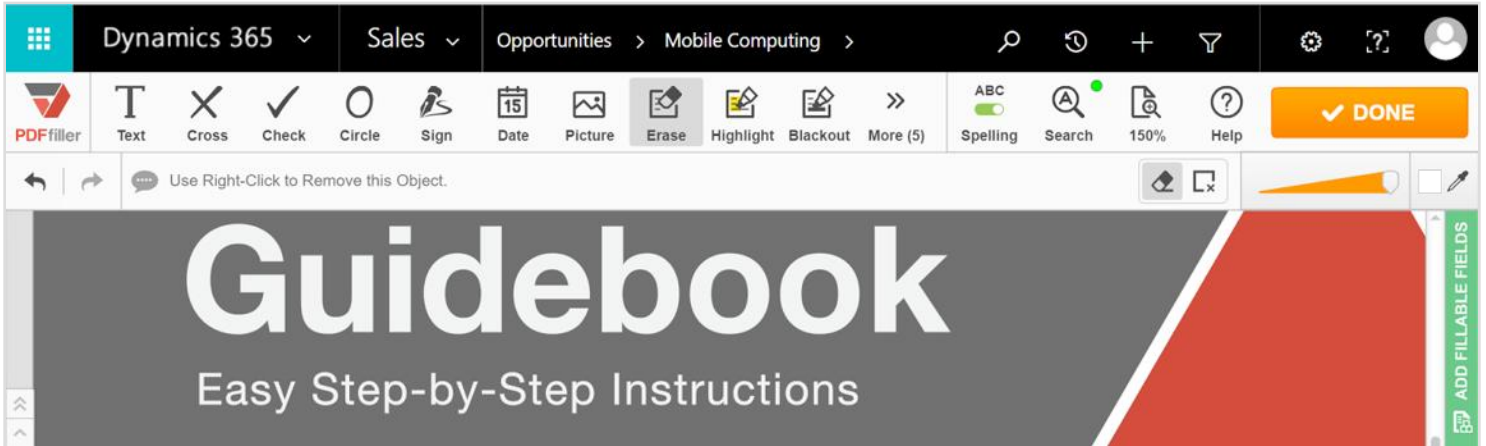
Use the slider to change the thickness of the eraser.

Navigate to the content you want to erase, press and hold down the mouse button, drag the eraser across the content, then release the button and click **OK**.

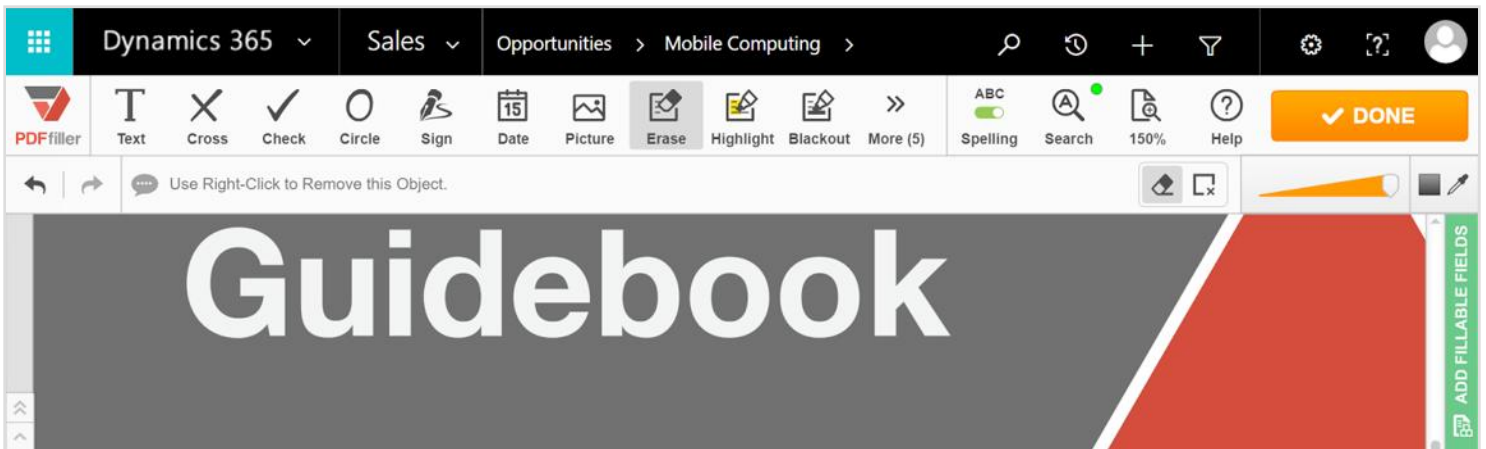


Then sele
PDFfiller to notify you each time

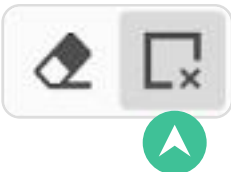
If the page color or background is not white, use the color selector to change the eraser's color.



Click the eyedropper icon then click once anywhere on the page or background. Navigate to the content you want to erase, and click and drag the eraser across it and click **OK**.



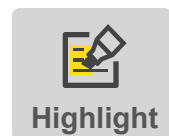
You can also delete content within a rectangle of any dimensions.



Click the **rectangle** icon, place the cursor at any angle of the rectangle you need to delete, press down the mouse button, drag it to the opposite angle of the rectangle and release the button.

Highlighting

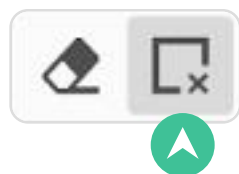
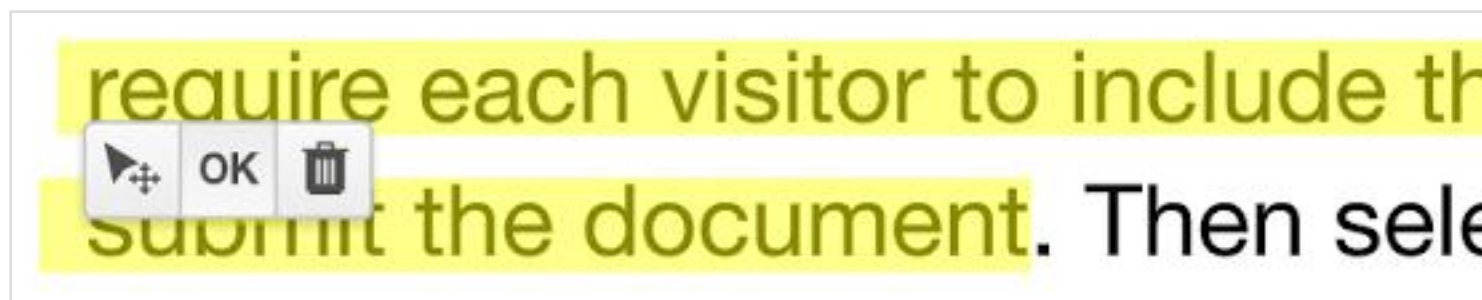
Highlight text in documents with the simple swipe of the cursor.



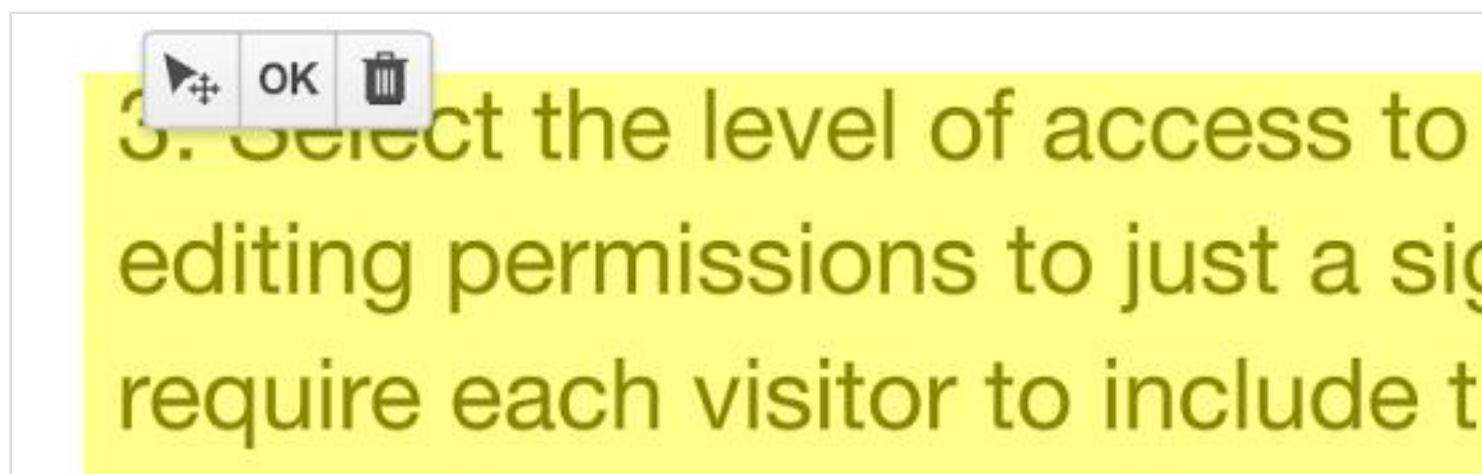
Click the **Highlight** button in the main toolbar, navigate to the content you want to highlight, press and hold down the mouse button, drag the cursor across the content, then release the button and click **OK**.



Use the slider to change the thickness of the highlighter before or after highlighting.



If you want to highlight an entire paragraph, click the rectangle icon, place the cursor in the top left corner of the paragraph, press down on the mouse button, drag the cursor to the bottom right corner and release the button.

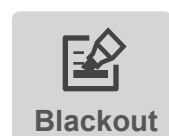


If you need to highlight specific words or phrases, use the **Search** tool and its highlighter.

To delete a highlight, select the highlight and then click the trash can icon.

Redacting

Use the **Blackout** tool to redact sensitive information.



Click the **Blackout** button in the main toolbar, navigate to the content you want to redact, then click and hold down the mouse button while dragging your cursor across it.



Use the slider to change the thickness of the black line before or after redacting.



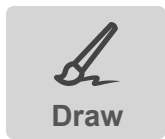
You can blackout content within a rectangle of any dimensions.



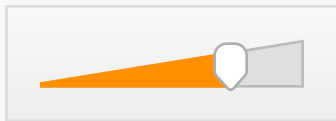
Click the **rectangle** icon, place the cursor at any angle of the rectangle you need to blackout, press down the mouse button, drag the cursor to the opposite angle of the rectangle and release the button.

Drawing

Use powerful tools to draw any shape.

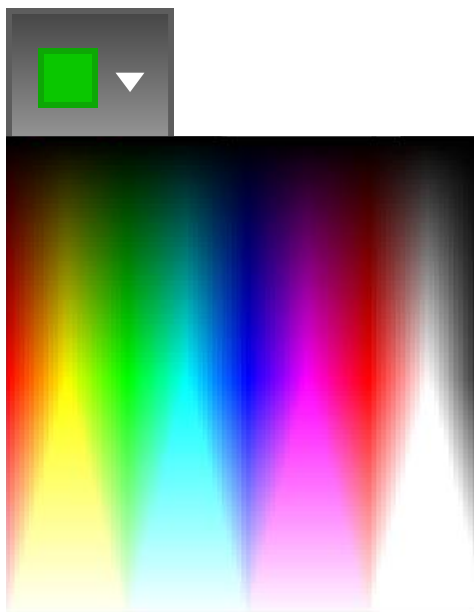


Select the **Draw** icon, the drawing toolbar will appear under the editing tools.

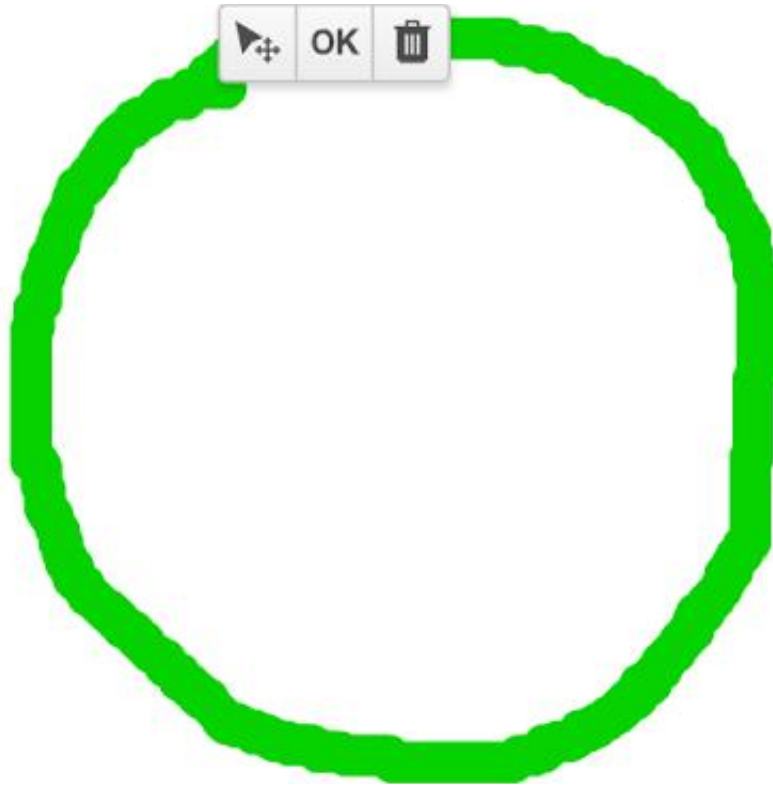


Use the slider to set the thickness of the line.

Click the color square and choose the color from the palette.



Click where you want to start and draw any shape by dragging. Release the mouse button to stop drawing and click **OK**.



You can change the thickness and color of the line after you've completed the drawing. Select it in the document and use the slider and the color palette.

Adding Text Boxes



Select the **Text Box** icon, in the main toolbar, click where you want to place the text box and type your comment.

To resize the text box, drag its corners or edges. Change the vertical and horizontal alignment of the text using the alignment tools.

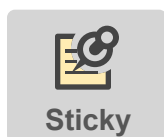


To change the color of the text, background or borders, click the respective color box and select the color you want.



Sticky Notes

Leave your comments with sticky notes.



Select the **Sticky** icon, in the main toolbar, click where you want to place the note and type your comment.

To resize the sticky note, drag its corners or edges. To change the color of a sticky note, click the Box icon and select the color from the palette. Change the text alignment by using the vertical and horizontal alignment tools.



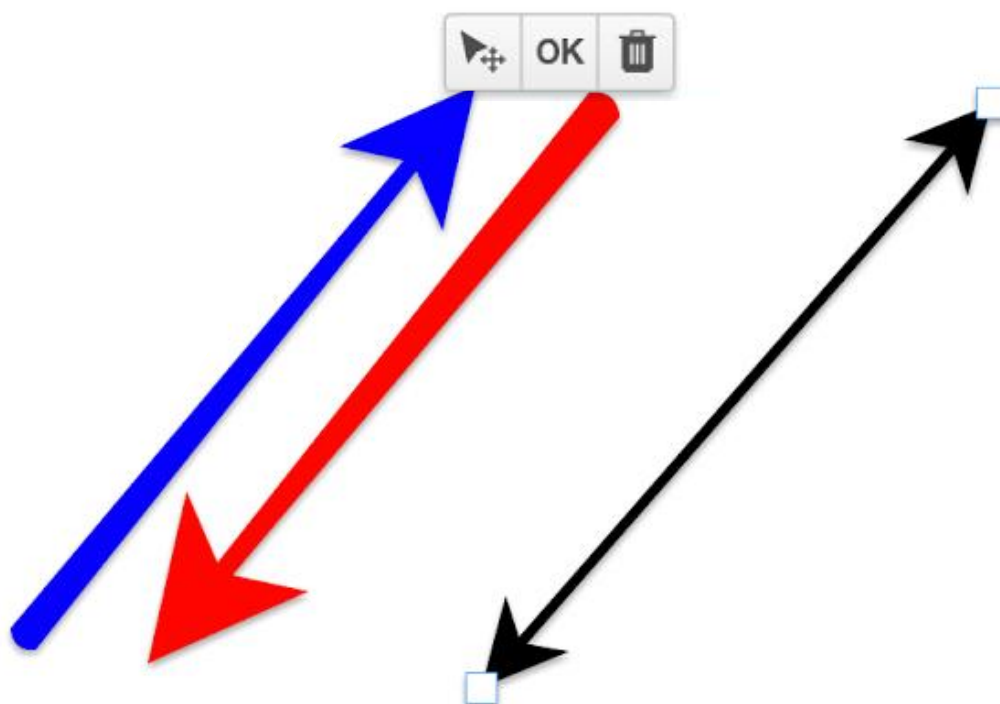
Adding Arrows



To add an arrow, click its icon in the main toolbar.

The arrow toolbar will appear under the editing tools. Select the arrow you need, then click anywhere to create the start point and drag it to where you want to create the end point, release the mouse button and click **OK**.

To change the arrow's color, click on the black square and choose the color from the dropdown menu. Use the slider to change the arrow's thickness.



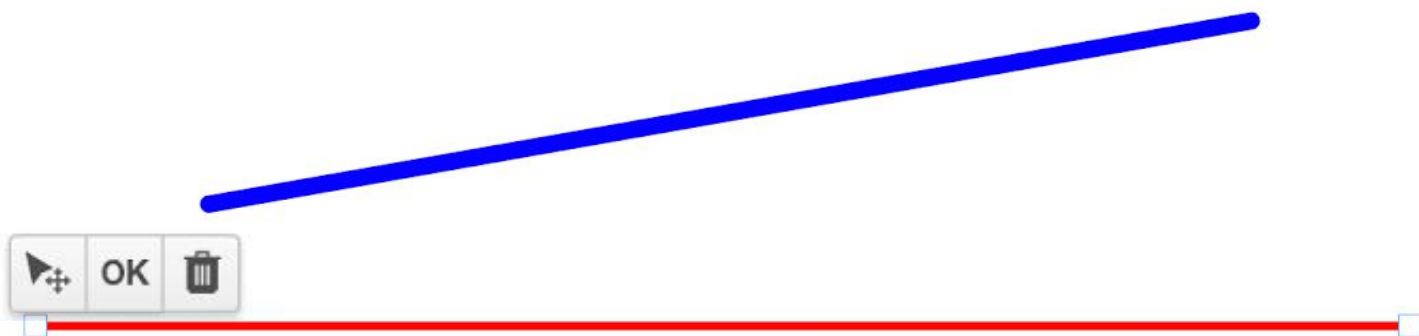
To reverse an arrow, select it and click the icon of the arrow going the opposite direction. To convert a simple arrow into a two-headed arrow, select the simple arrow and click the icon of the two-headed arrow. To change the position of the start or end point, just drag it.

Adding Lines



To add a straight line to the document, click the Line icon in the main toolbar.

The line toolbar will appear under the editing tools. Click where you want to create the start point and drag the cursor to where you want to create the end point, release the mouse button and click **OK**.



To change the line's color, click on the black square and choose the color you want. You can choose the color before adding it to the document.

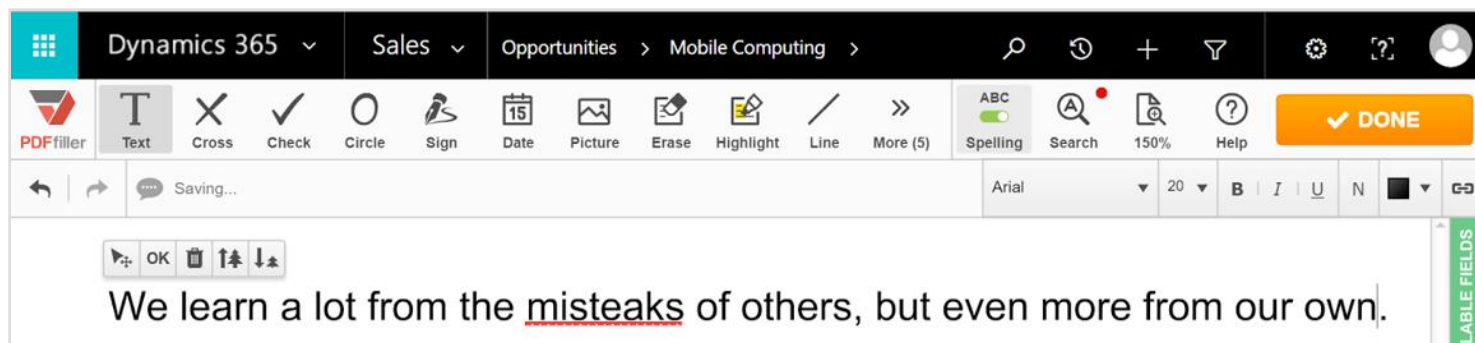


Use the slider before or after adding a line to change its thickness.

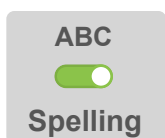
You can change the position of the end of a line by dragging it.

Spellchecker

The spellchecker checks only what you type and underlines misspelled, unknown or uncapitalized words.

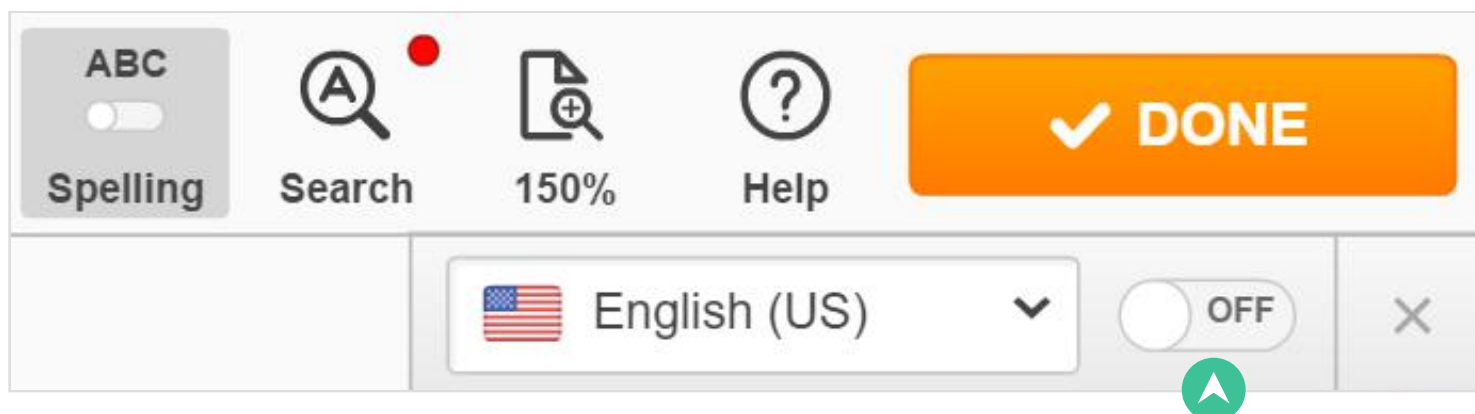


You can activate the spellchecker at any time before or after you start typing.



Click the Spelling icon, in the main toolbar.

The spellchecker panel will appear below the main toolbar, just click on the **toggle**.



Apart from English, you can check Spanish, Italian, German, Portuguese, French and Norwegian texts. Select the language you need from the dropdown list.

To correct a word, right-click it and choose its replacement from the drop-down list.

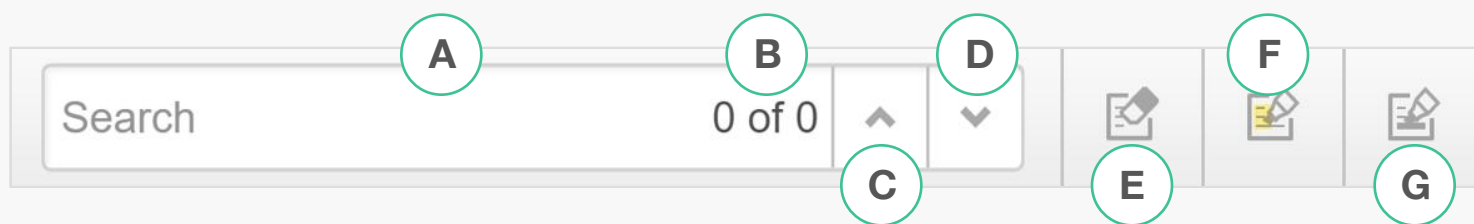


The spellchecker underlines words that it does not recognize. If the word is spelled correctly, you can add it to your dictionary. The spellchecker will recognize it next time you type it.

Searching Text

Find specific words or phrases in PDF documents.

Use the Search tool to find a word or a phrase in the currently open document.



A. Search field

B. Counter

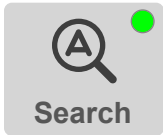
C. Previous

D. Next

E. Erase

F. Highlight

G. Blackout



To activate the Search tool, click the **Search** icon in the main toolbar or press **CTRL+F** (or **⌘ F** on a Mac) on your keyboard.

If a PDF document is not searchable, the dot on the Search icon will be red.

Type the text you want to find in the search field. The counter will show you the number of the current search term and the total number of search terms found in the document. The current search term is highlighted in green, the others are highlighted in red.

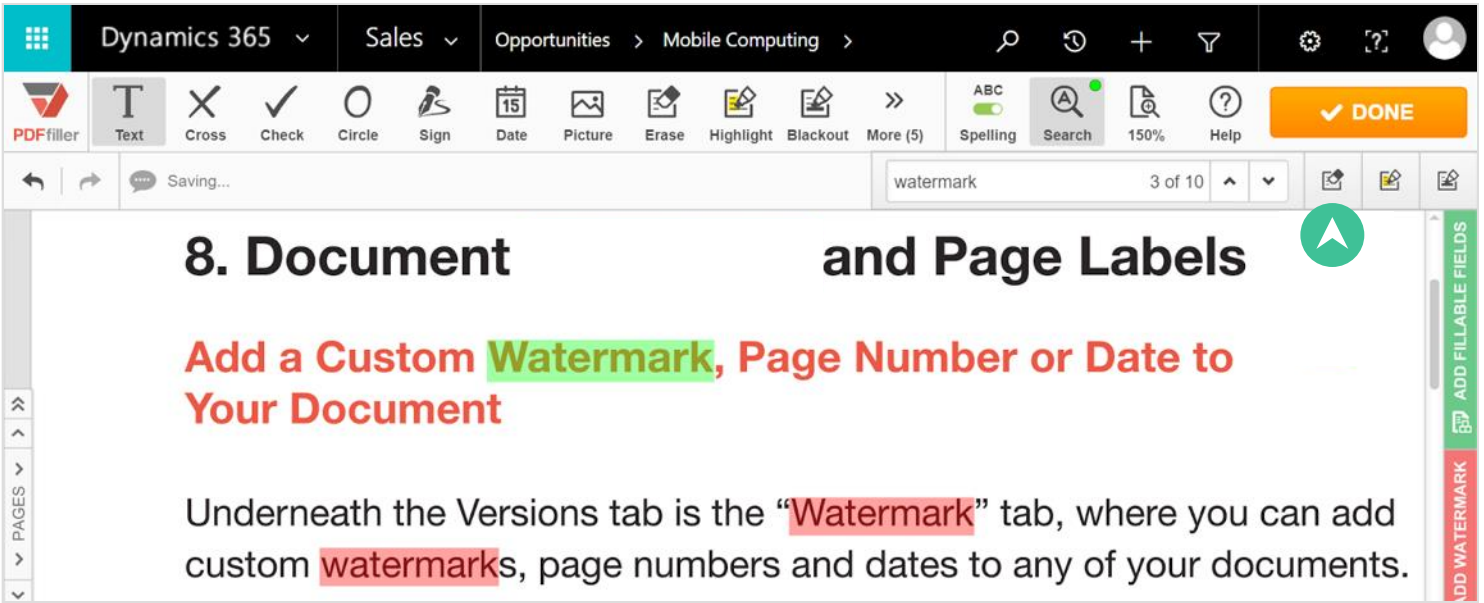
The screenshot shows the Dynamics 365 interface with a search for 'watermark'. The search results are displayed in a document viewer. The search term 'watermark' is highlighted in green in the document title and in red in the body text. The search field in the toolbar shows 'watermark' and the counter indicates '2 of 10' results. The 'DONE' button is visible in the top right corner.

To jump to the next instance of the search term, click **Next**; to return to the previous instance, click **Previous**.

The close-up shows the search field with 'watermark' and the counter '2 of 10'. Below the counter are two green arrows pointing up and down, which are the 'Next' and 'Previous' navigation buttons.

Search and Erase

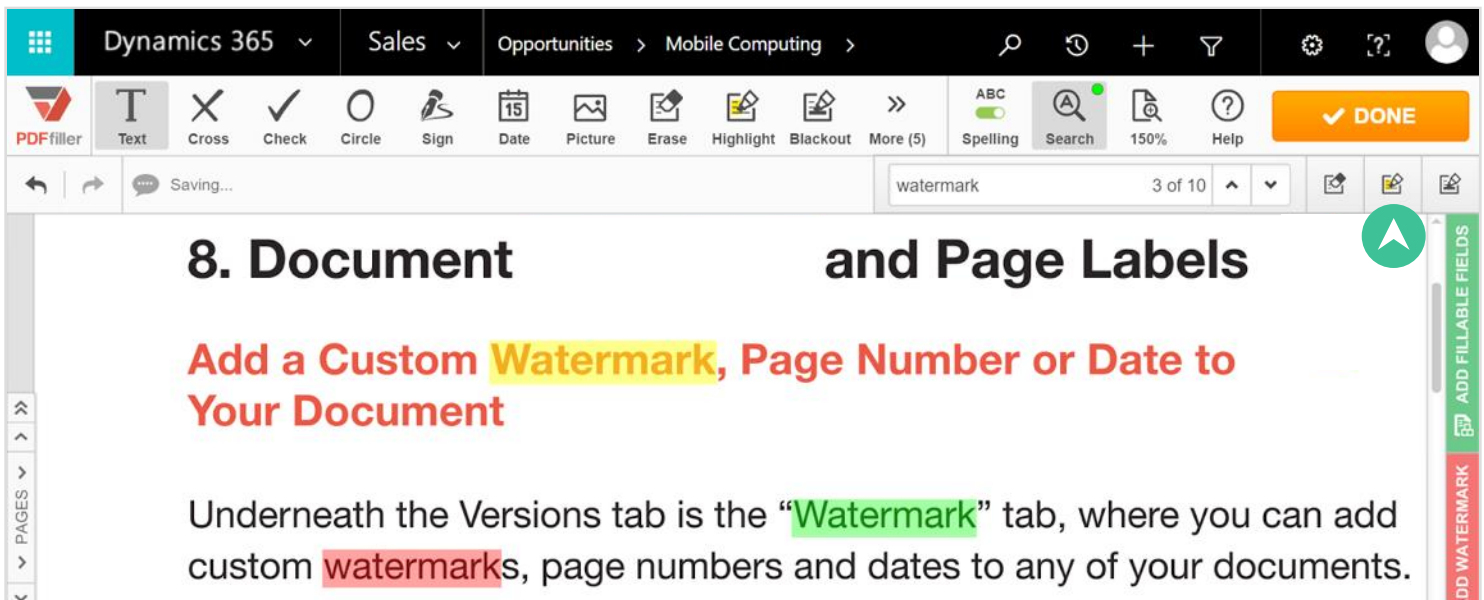
To delete the current search term, click **Erase**. The next search term will automatically become current.



The screenshot shows the Dynamics 365 PDF viewer interface. The top navigation bar includes 'Dynamics 365', 'Sales', 'Opportunities', and 'Mobile Computing'. The toolbar contains various editing tools: PDF filler, Text, Cross, Check, Circle, Sign, Date, Picture, Erase, Highlight, Blackout, More (5), Spelling, Search, 150%, and Help. A search bar at the top right shows 'watermark' and '3 of 10'. The document content is titled '8. Document and Page Labels' and includes the sub-heading 'Add a Custom Watermark, Page Number or Date to Your Document'. The text below reads: 'Underneath the Versions tab is the "Watermark" tab, where you can add custom watermark, page numbers and dates to any of your documents.' The word 'Watermark' in the text is highlighted in red, and the word 'watermark' in the sub-heading is highlighted in green. A green arrow points to the 'Erase' button in the toolbar.

Search and Highlight

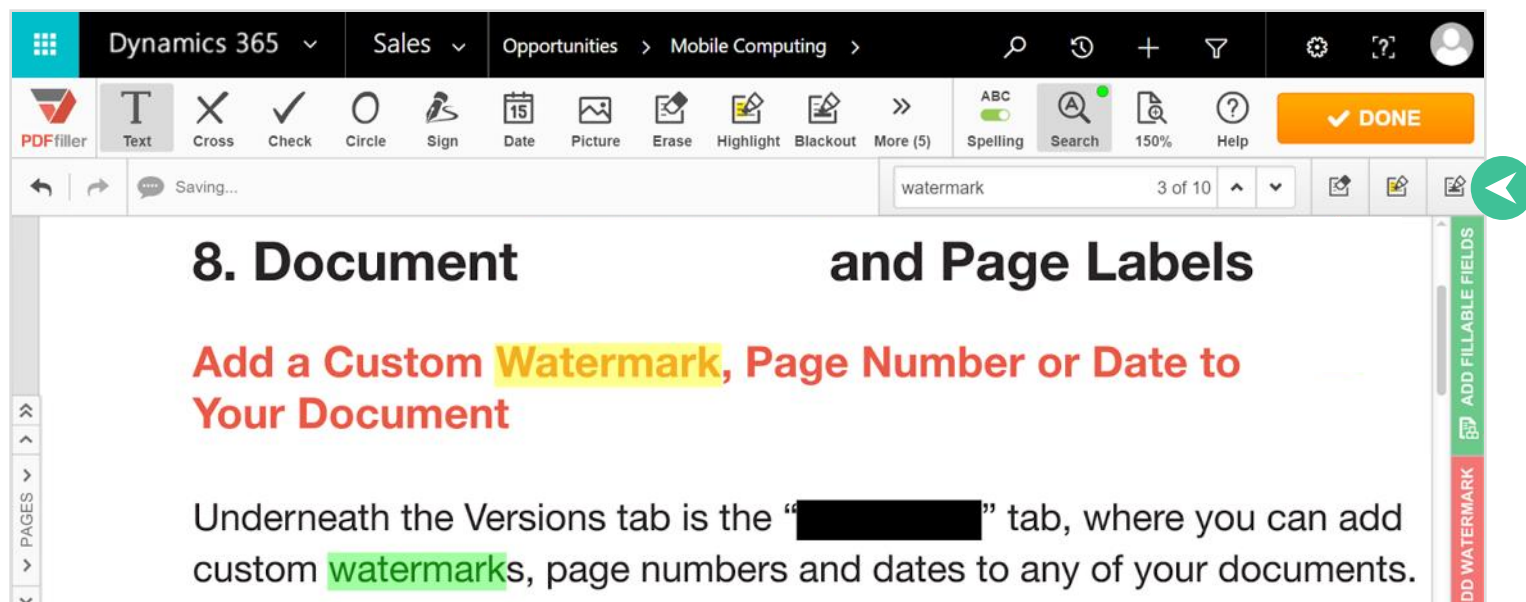
To highlight the current search term in yellow, click **Highlight**.



The screenshot shows the Dynamics 365 PDF viewer interface, similar to the previous one. The search bar at the top right shows 'watermark' and '3 of 10'. The document content is the same as in the previous screenshot. The word 'Watermark' in the text is highlighted in green, and the word 'watermark' in the sub-heading is highlighted in yellow. A green arrow points to the 'Highlight' button in the toolbar.

Search and Redact

To redact the search term, click **Blackout**.



Fillable Fields

Transform any document or form into a fillable form with smart digital fields using DaDaDocs' drag and drop wizard.

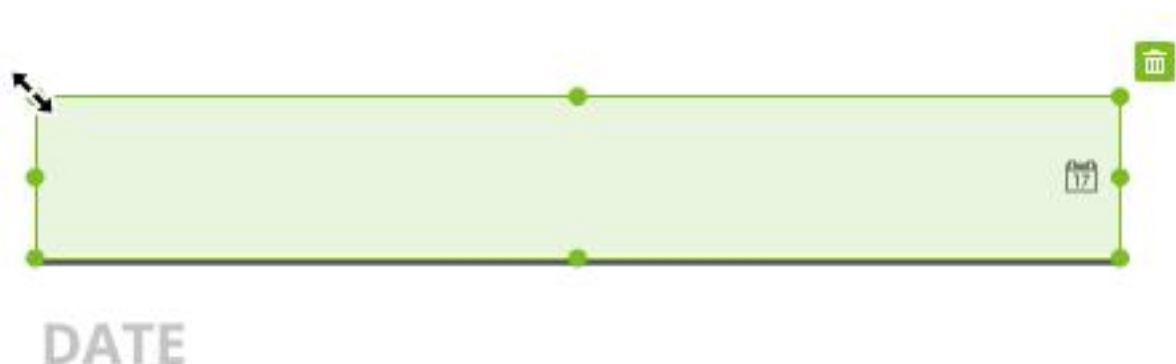
Drag and Drop Fields

The technique for adding fields is the same for all field types.

ADD FILLABLE FIELDS

While editing a document, open the **Add Fillable Fields** tab on the right.

Select the field you need, then drag and drop it where it should be in the document. Resize the field by dragging its corners or edges.



To delete a fillable field, click on the trash can icon above it.

When you've finished adding fillable fields to your document, press the **Save** button in the top right corner.

Required Fields

You can mark any field as **Required**. Check the box and a red asterisk will appear in the top right corner of the field.



It is impossible to submit a form if a required field is empty.

Checkboxes



To add a checkbox, select the **Checkbox** icon in the right pane and click where you want to place it.

The screenshot shows the Dynamics 365 interface. On the left, a green square represents a form field with a checkbox icon in the top right corner and a four-way arrow in the center. On the right, the 'Select Field Type to Add' menu is open, showing various field types: Text, Number, Date, Dropdown, **Checkbox** (highlighted), Signature, Initials, Photo, and Formula. The 'Order' pane is also visible on the right.

When you resize a checkbox, the next one will be of the same size so you will not have to resize each checkbox.

To customize a checkbox, select it, then click **Advanced** to expand options.

The screenshot shows the Dynamics 365 interface. On the left, the same green square with the checkbox icon is shown. On the right, the 'Advanced' options are expanded. The 'Type of Checkbox' section shows three options: a checked checkbox, an unchecked checkbox (highlighted), and a disabled checkbox. The 'Default' section shows two radio buttons: 'Not Checked' (selected) and 'Checked'. There is also a 'Note (Optional)' field with the text 'e.g. Please check...'.

To customize a checkbox, select it, then click **Advanced** to expand options:

Type of Checkbox. You can format the checkbox to be filled with a simple checkmark, "X", or circle.

Default. Select whether the default setting for a checkbox is checked or unchecked.

Note. Enter instructions or tips for filling the field. Users will see the note when they hover their mouse over the field.

Database Field Name. Create a name for the field that will appear when you export filled data to a spreadsheet or when you use the DaDaDocs API.

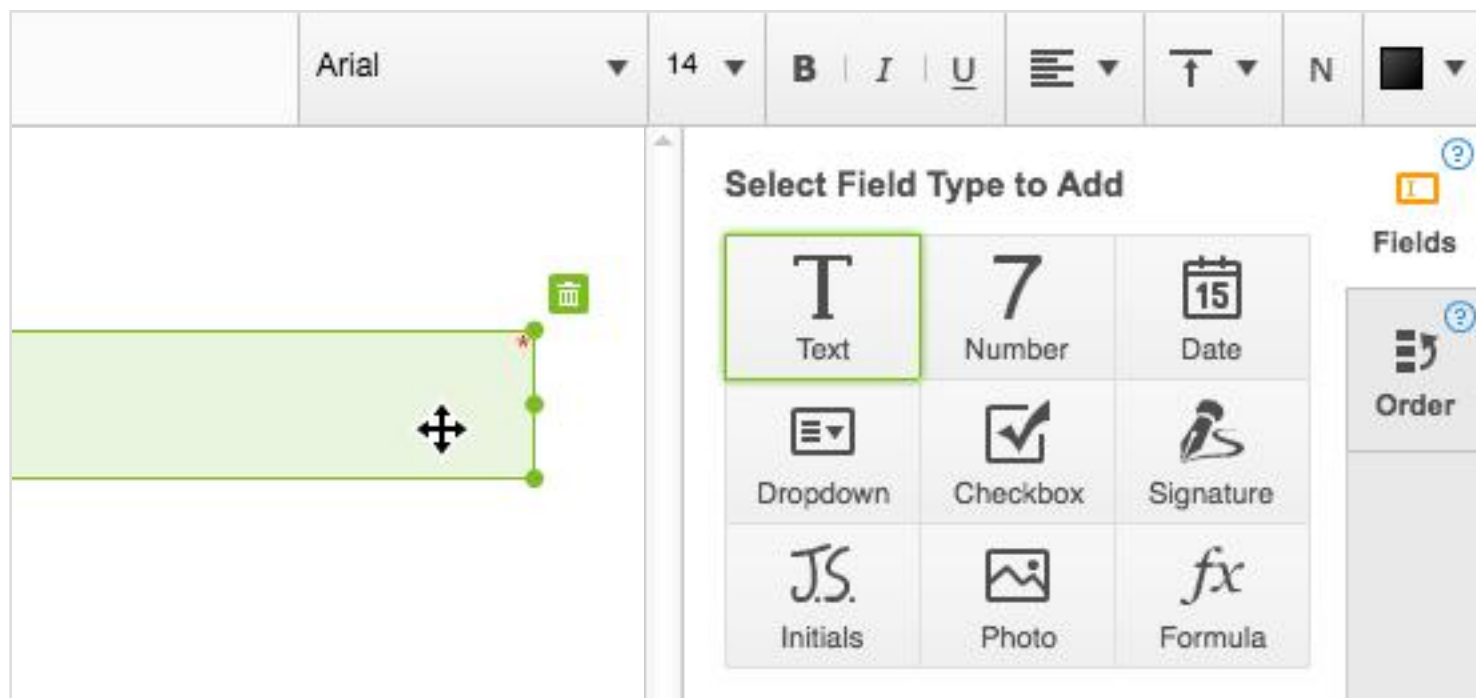
Group Name. Group checkboxes together by entering the same group name for each box. When filling the document, only one checkbox within a group can be checked at any time.

Text Field



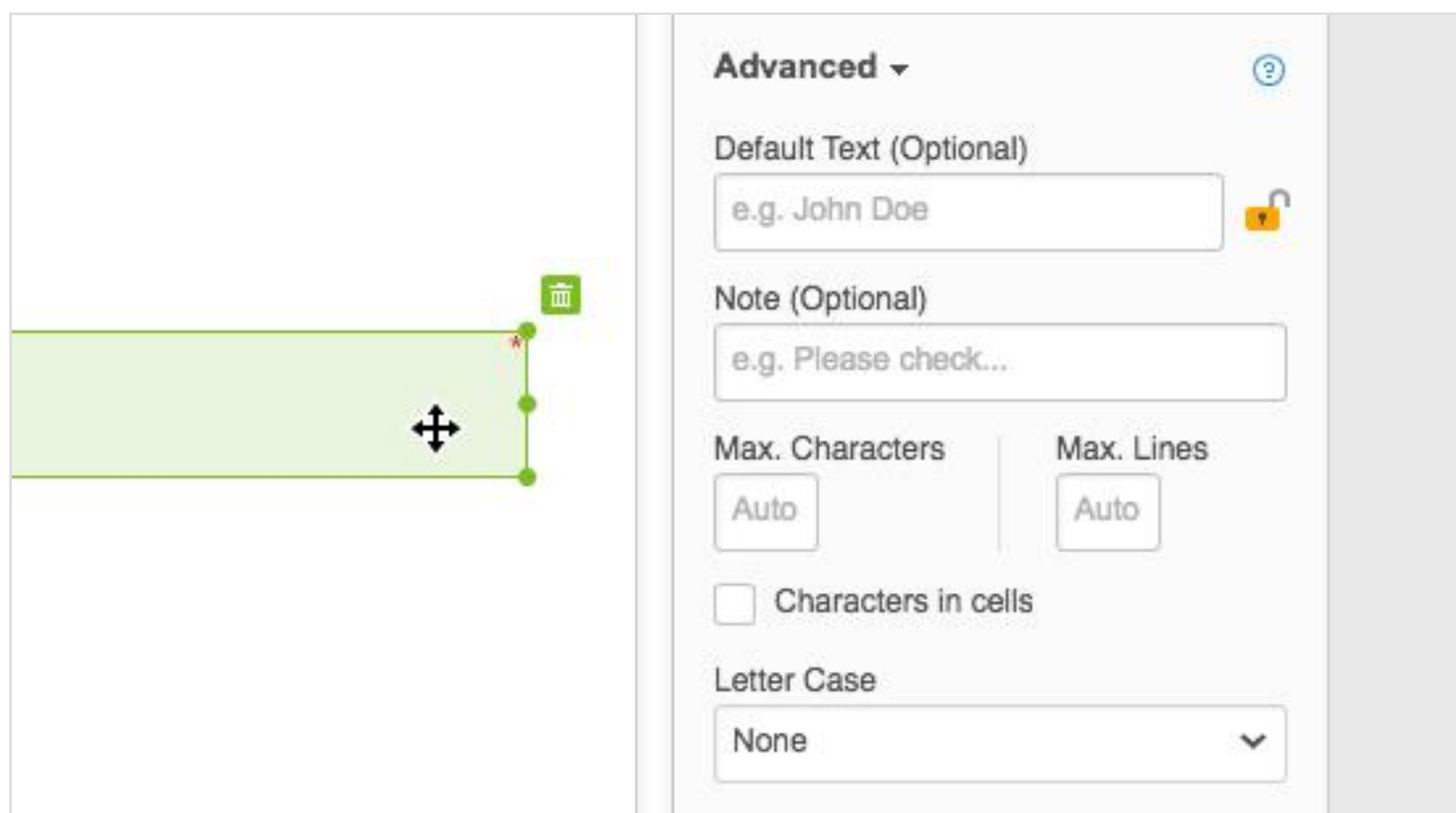
To add a text field, click the **Text** icon, then click where you want to place the field.

Use the text formatting tools to preset the field's text format including the font, size, color and alignment of the text. It will be impossible to change the text format while filling the field.



The screenshot shows the Dynamics 365 interface with a ribbon at the top containing font settings (Arial, 14, Bold, Italic, Underline) and alignment options. A green text field is being added to a document, indicated by a green border and a crosshair icon. The 'Select Field Type to Add' panel is open, displaying various field types: Text, Number, Date, Dropdown, Checkbox, Signature, Initials, Photo, and Formula. The 'Text' field type is highlighted with a green border. On the right, there are 'Fields' and 'Order' panels.

To customize the text field further, click **Advanced** to expand options.



The screenshot shows the Dynamics 365 interface with the ribbon at the top. The 'Advanced' panel is expanded, showing options for Default Text (Optional), Note (Optional), Max. Characters (Auto), Max. Lines (Auto), Characters in cells (checkbox), and Letter Case (None). The text field in the document is still highlighted with a green border.

To customize the text field further, click **Advanced** to expand options.

Default Text is the text that will appear in the field when others fill the form. If you lock the field, nobody will be able to replace the default text.

Note. Here you can enter any instructions or tips for filling the field. Users will see the note when they fill the field.

Max Characters. Set the maximum number of characters allowed in the field. The default setting will limit that number to what can physically fit into the field.

Max Lines. Set the maximum number of lines allowed in the field.

Database Field Name. Create a name for the field that will appear when you export filled data to a spreadsheet or when you use the DaDaDocs API.

Date Field



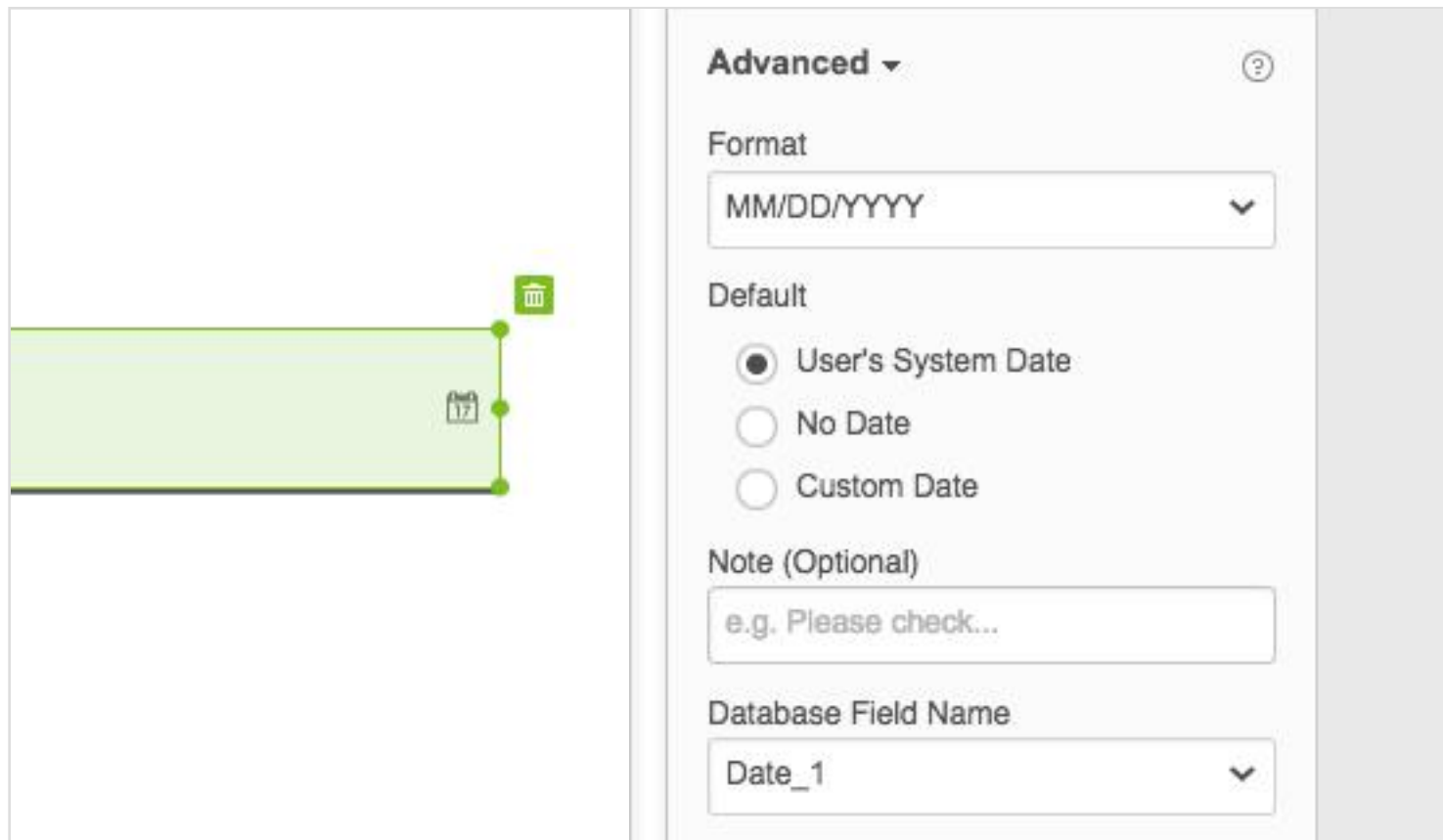
Date

To add a date field, click the **Date** icon, then place the field where it should be in the document.



DATE

To customize a date field, click **Advanced** to expand options.



The image shows a configuration panel for a date field in Dynamics 365. On the left, a date field is visible with a calendar icon and a date of 1/17. The right panel is titled "Advanced" and contains the following settings:

- Format:** A dropdown menu set to "MM/DD/YYYY".
- Default:** Three radio button options: "User's System Date" (selected), "No Date", and "Custom Date".
- Note (Optional):** A text input field containing "e.g. Please check...".
- Database Field Name:** A dropdown menu set to "Date_1".

To customize a date field, click **Advanced** to expand options.

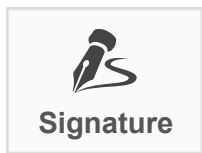
Format. Select one of many date formats.

Default. Choose the date that the field will display before the user changes it.

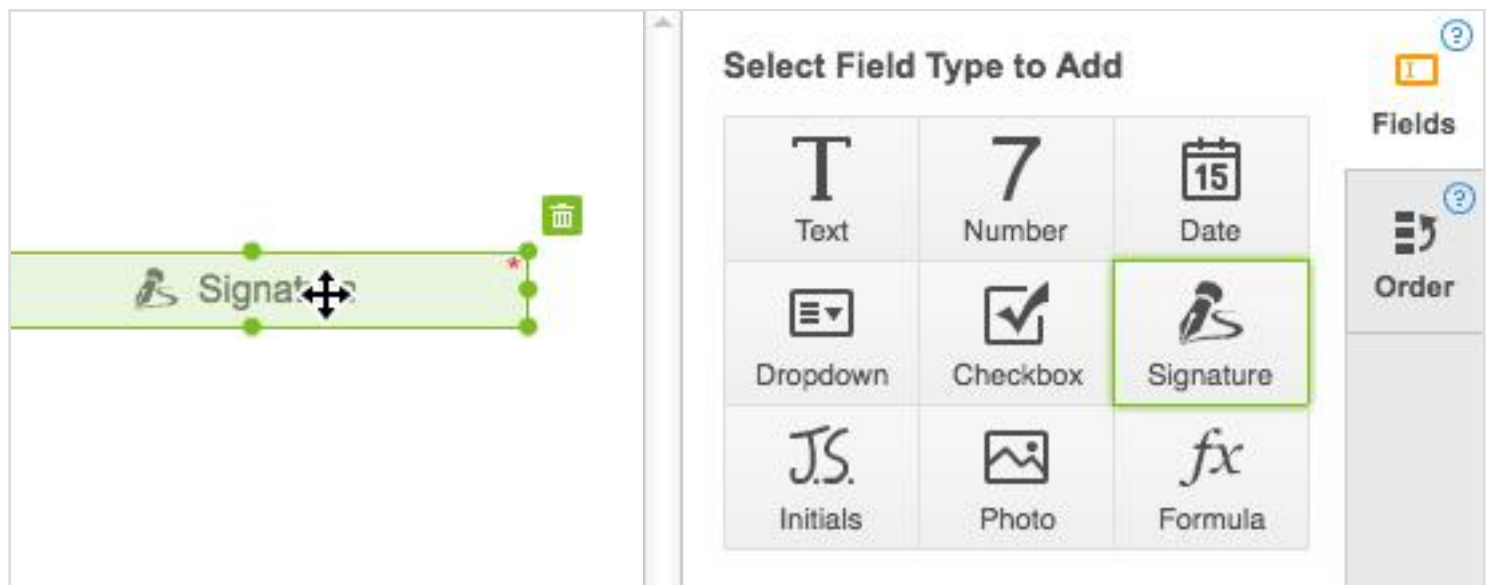
Note. Enter any instructions or tips for filling the field.

Database Field Name. Create a name for the field that will appear when you export filled data to a spreadsheet or when you use the DaDaDocs API.

Signature Field



To add a signature field, click the **Signature** icon and drag the field where you want to place it.



A person who signs the document will have to click the field and use the DaDaDocs signature tool.

Dropdown Field

Select color: **Green**

Please select an item

Green

Red

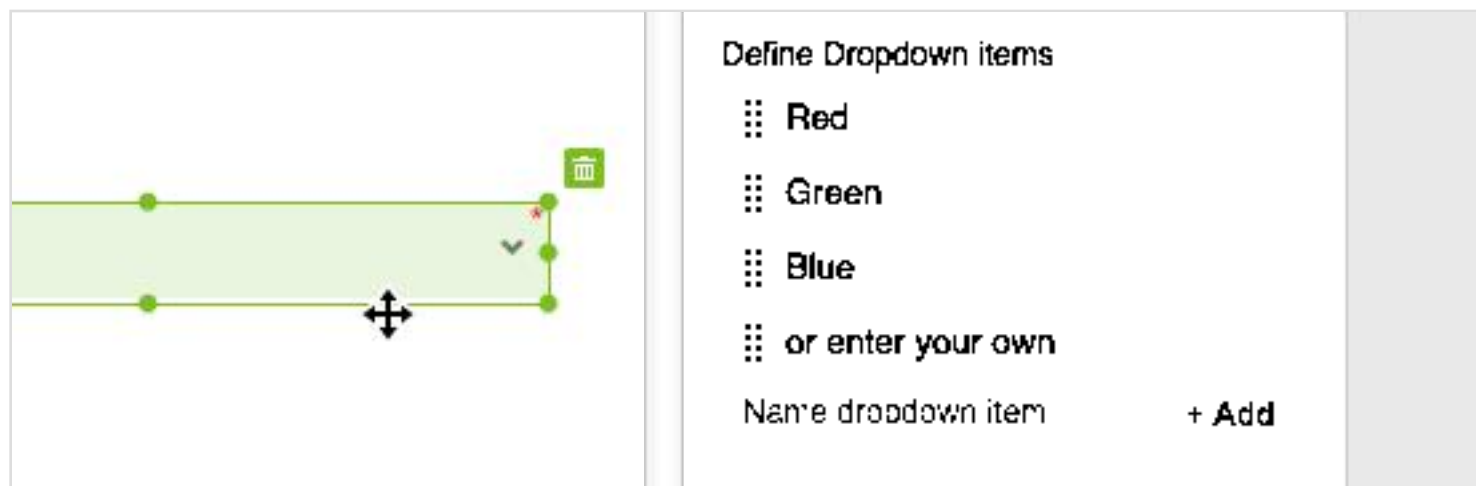
Pink

Green

or enter your own

Confirm

To add a drop-down list, click the Dropdown icon in the right pane and drag the field where it should be in the document.



To add an item to the list, type a new value in the empty field and click **+ Add**. To allow users to provide their own alternative, check the respective box.

To customize the dropdown field, click **Advanced**.



To customize the dropdown field, click **Advanced**.

Default. Select the default item from the list you've created.

Note. Enter any instructions or tips for filling the field.

Database Field Name. Create a name for the field that will appear when you export filled data to a spreadsheet or when you use the DaDaDocs API.

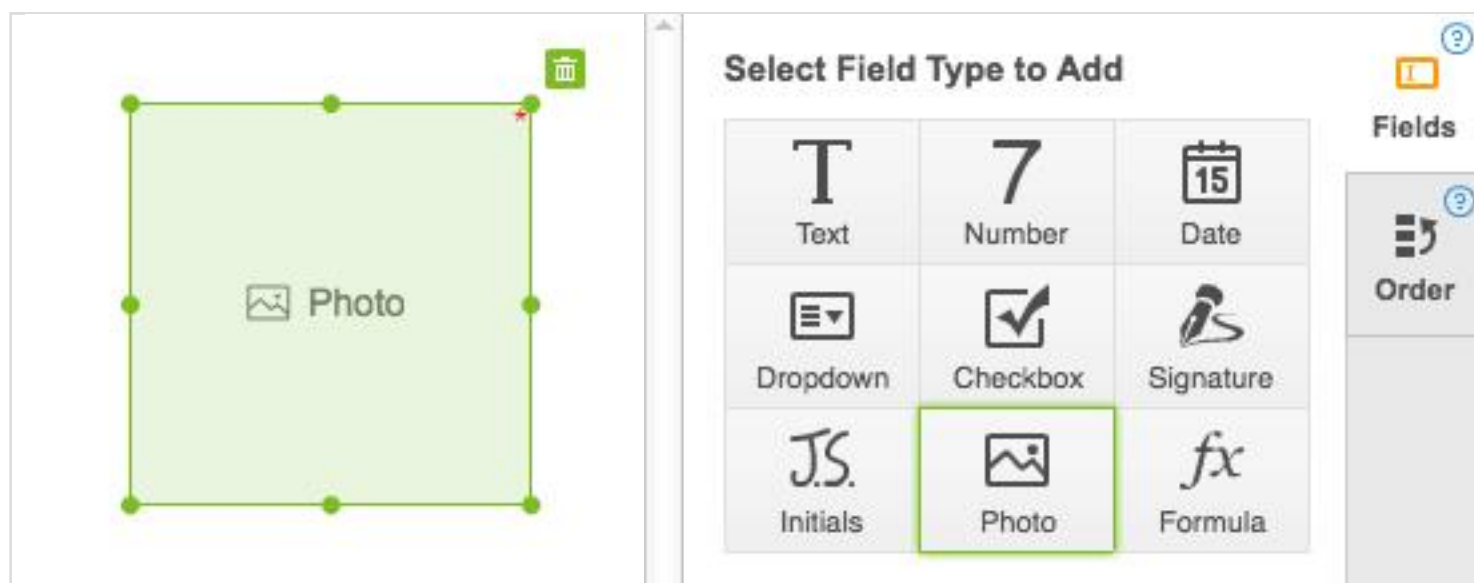
Use the text formatting tools to preset the field's text format including the font, size, color and alignment of the text.

Photo Field







Photo

To add a photo field, click the **Photo** icon, and drag the field where you'd like it in the document.



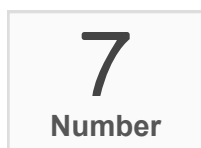
The screenshot shows a document editor interface. On the left, a light green rectangular field is being added to the document, with a photo icon and the word "Photo" inside. On the right, a panel titled "Select Field Type to Add" displays a grid of field options. The "Photo" option is highlighted with a green border. The options in the grid are:

T Text	7 Number	15 Date
 Dropdown	 Checkbox	 Signature
J.S. Initials	 Photo	fx Formula

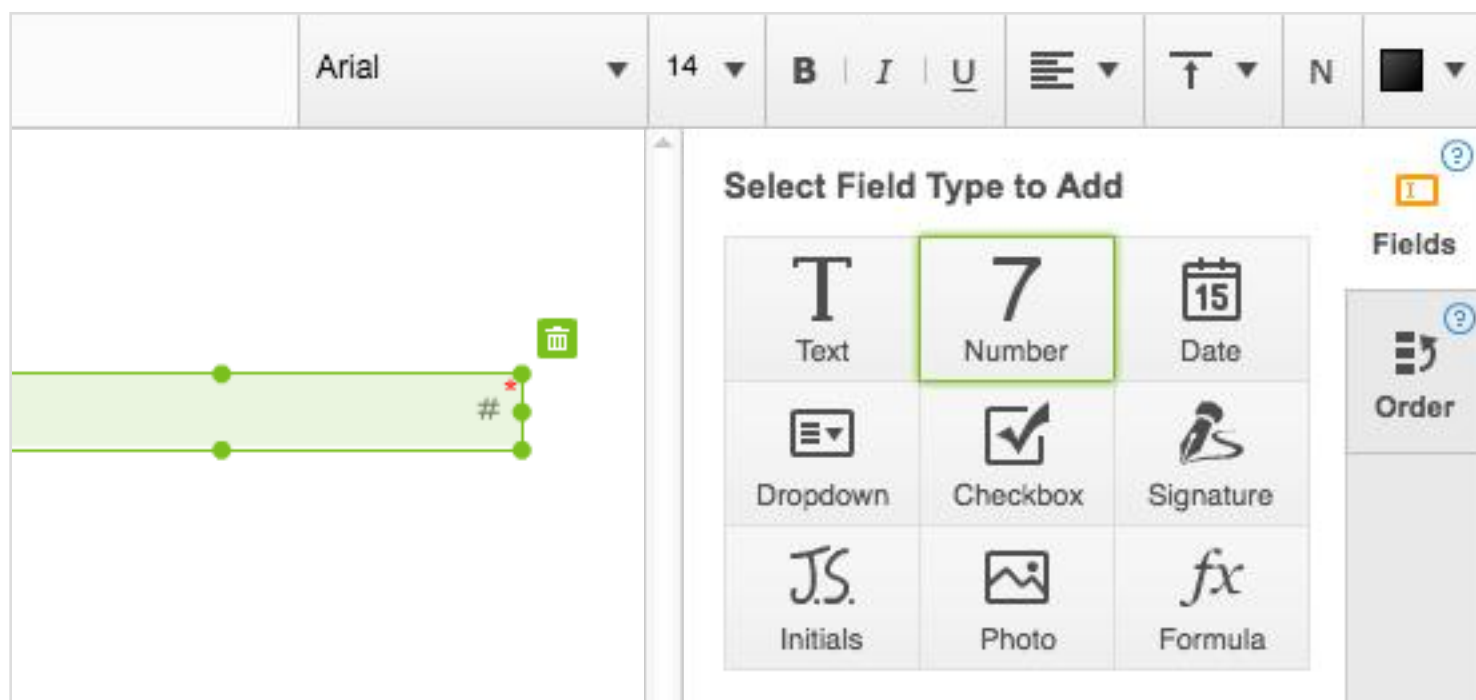
On the far right, there are two vertical panels: "Fields" with a photo icon and "Order" with a list icon.

Anyone filling the document will be able to click the photo field and either upload a photo from their device or take one with their camera.

Number Field



To add a number field, click the **Number** icon and drag the field where you'd like to place it.



Use the text formatting tools to preset the field's number format including the font, size, color and alignment.

To customize the number field further, click **Advanced** to expand options.

The screenshot shows the 'Advanced' settings panel for a number field. It includes the following options:

- Advanced** (dropdown menu)
- Default Number (Optional)**: A text input field containing 'e.g. 555-555-5555' and a lock icon.
- Note (Optional)**: A text input field containing 'e.g. Please check...'.
- Max. Characters**: A dropdown menu set to 'Auto'.
- Characters in cells**
- Database Field Name**: A dropdown menu set to 'Number_1'.

To customize the number field further, click **Advanced** to expand options.

Default number will appear in the field when others open the form. If you lock the field, nobody will be able to replace the default number.

Note. Here you can enter any instructions or tips for filling the field. Users will see the note when they fill the field.

Max Characters. Set the maximum number of characters allowed in the field. The default setting will limit that number to what can physically fit into the field.

Database Field Name. Create a name for the field that will appear when you export filled data to a spreadsheet or when you use the DaDaDocs API. You can use the database field name as an operand when creating formula fields.

Formula Field

You can make a calculation using the formula field.



First, you need to create number fields that will be used as operands. Then, click **Formula** and place the formula field where you need it.

Write the formula in the **Formula Builder** just above the document using the number field names as operands.

The screenshot shows the PDFfiller Editor interface. At the top, there's a toolbar with 'Preview', 'Cancel', and 'SAVE' buttons. Below that, a formula bar displays 'Formula_1 = (Number_1 + Number_2) / Number_3'. The main workspace shows three number fields labeled A, B, and C. A formula field is being placed below them, containing the text '(A + B) / C = ' followed by a plus sign and a small 'fx' icon. On the right, a 'Select Field Type to Add' panel is open, showing various field types: Text, Number, Date, Dropdown, Checkbox, Signature, Initials, Photo, and Formula. The 'Formula' option is highlighted. Below the panel, a 'Formula builder' section provides instructions: 'Formula field lets you easily create formulas to calculate a value based on number fields in the document. You can easily find a Formula builder at the top of your document.'

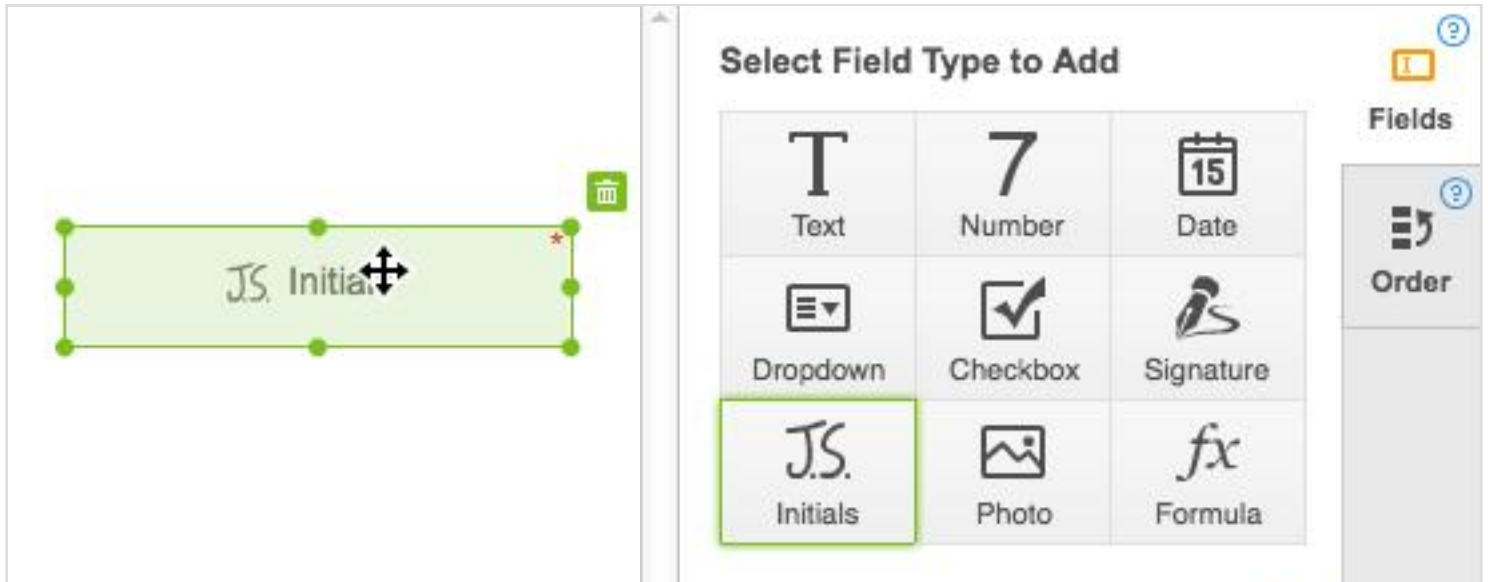
When a user fills the number fields, the formula field will automatically show the result of the calculation.

The screenshot shows the Dynamics 365 PDFfiller interface. At the top, there's a navigation bar with 'Dynamics 365', 'Sales', 'Opportunities', and 'Mobile Computing'. Below that, a toolbar contains various editing tools like Text, Cross, Check, Circle, Sign, Date, Picture, Erase, Highlight, Blackout, Text Box, Arrow, Line, More (2), Spelling, Search, 150%, and Help. A 'DONE' button is on the right. The main workspace shows three number fields labeled A, B, and C, which are now filled with the values 160, 140, and 3. Below them, the formula field displays the result '(A + B) / C = 100.00'. On the right side, there's a vertical bar with 'ADD FILLABLE FIELDS' and 'DO WATERMARK' buttons.

Initials Field



To add a fillable field for initials, click the **Initials** icon and drag the field where you want to place it

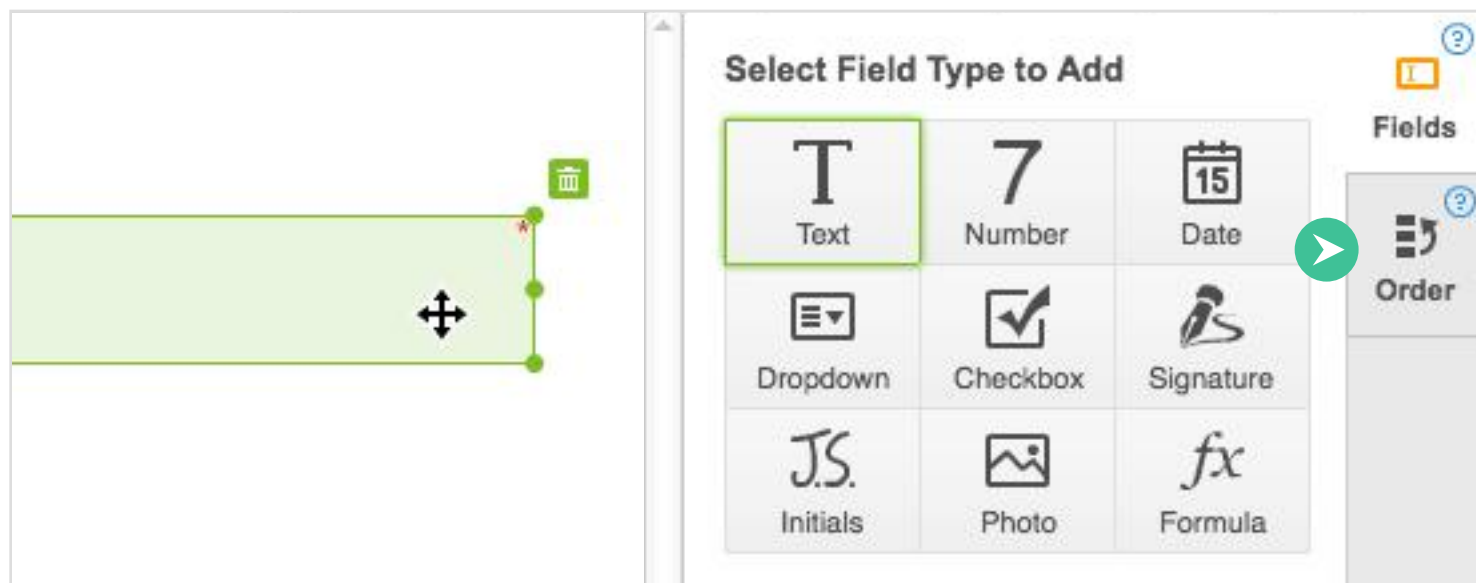


Order

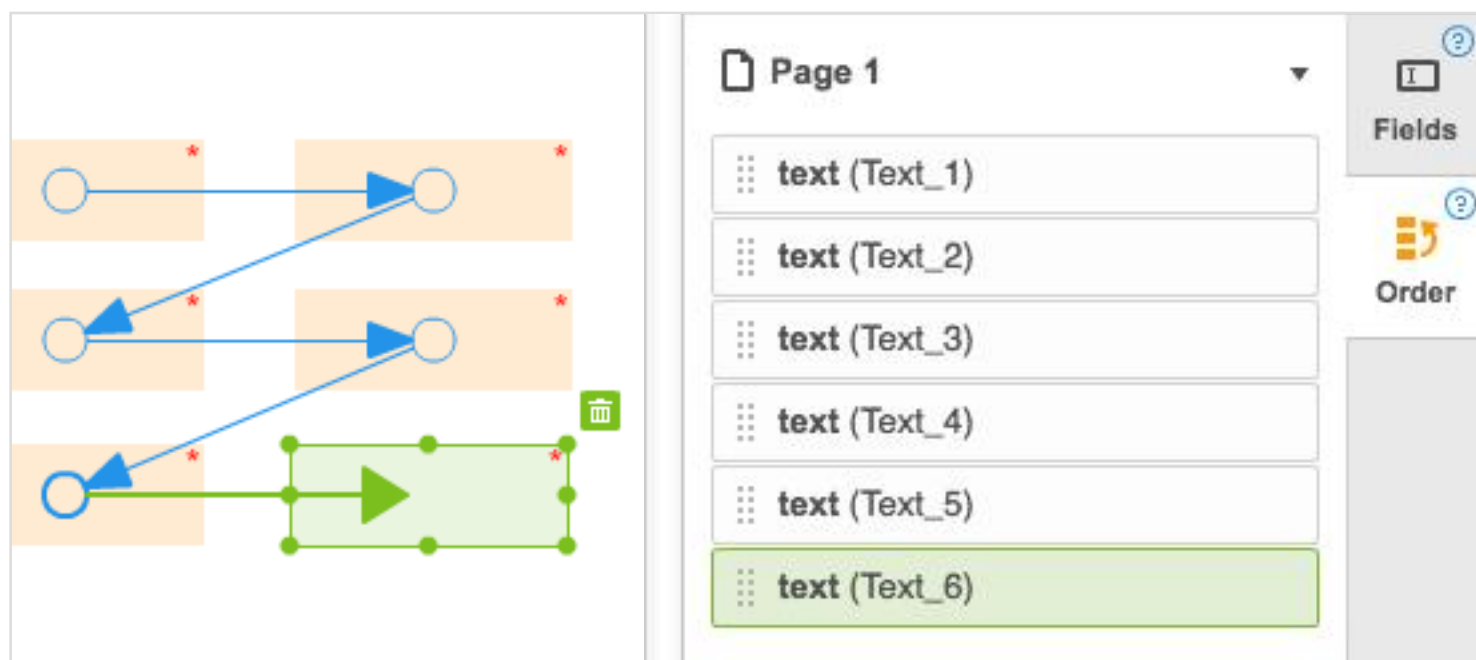
When you fill a fillable field, the next one either becomes active automatically, or you can use the **Next** button to jump to the next field if you choose to follow the default route. The **Next** button appears only under a text, number, signature or initials field.

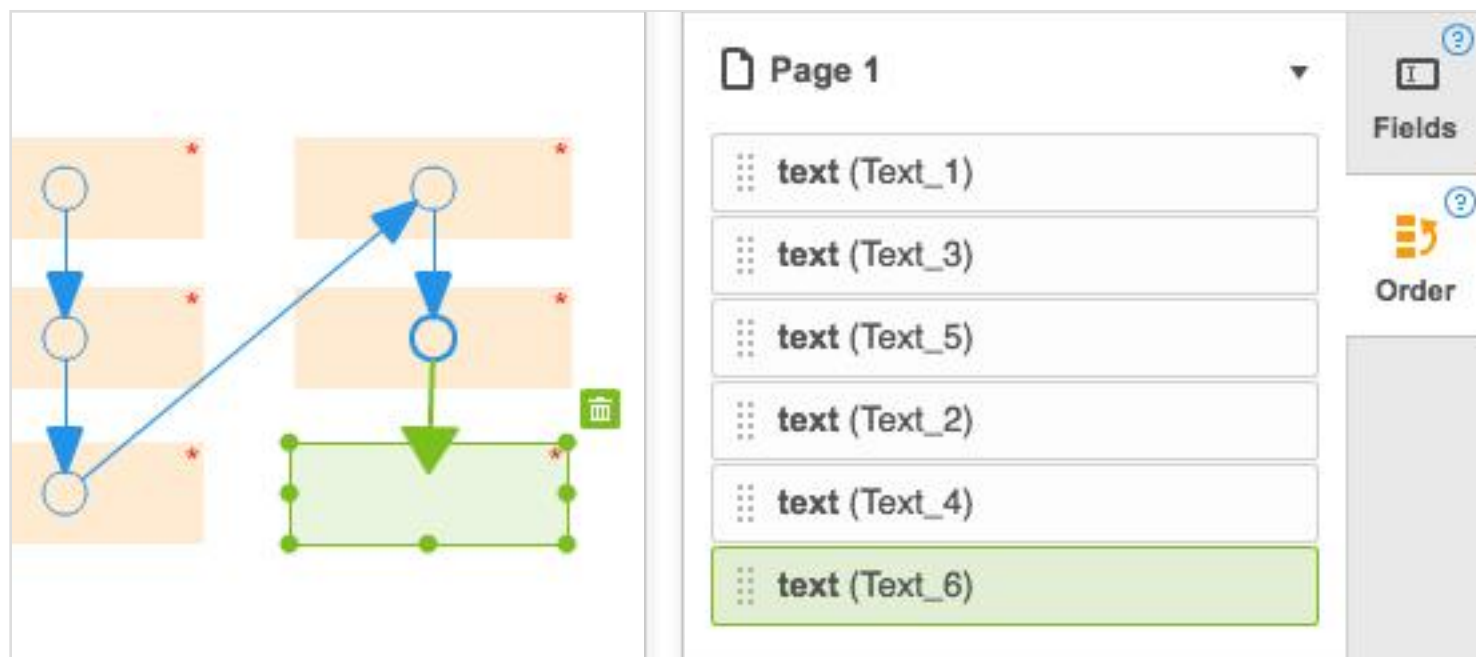


Adding fillable fields to the document, you can set a sequence in which the users will fill them. First, open the **Order** tab.



Then, drag the fields' thumbnails to organize them in the desired order.

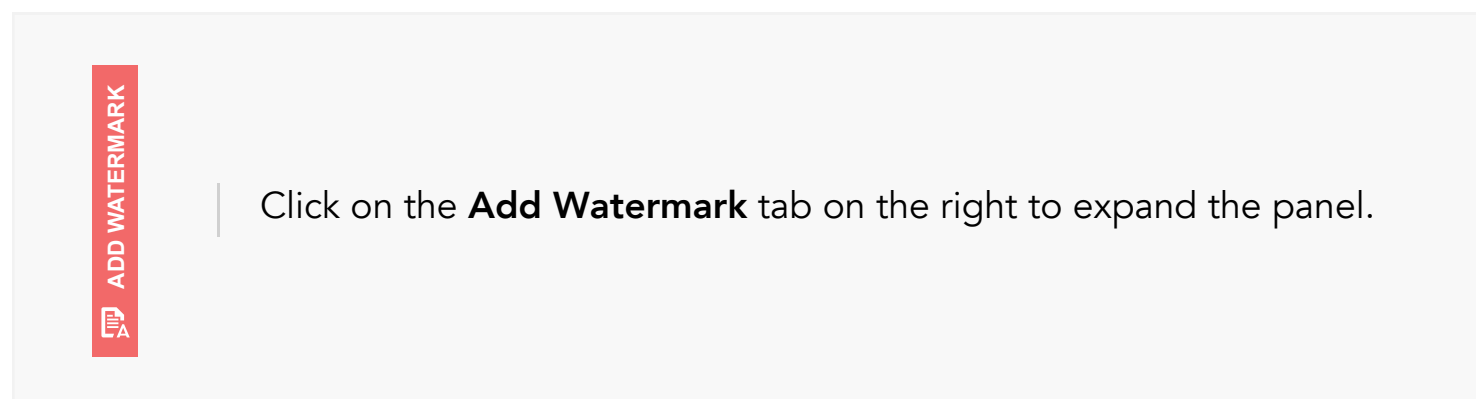




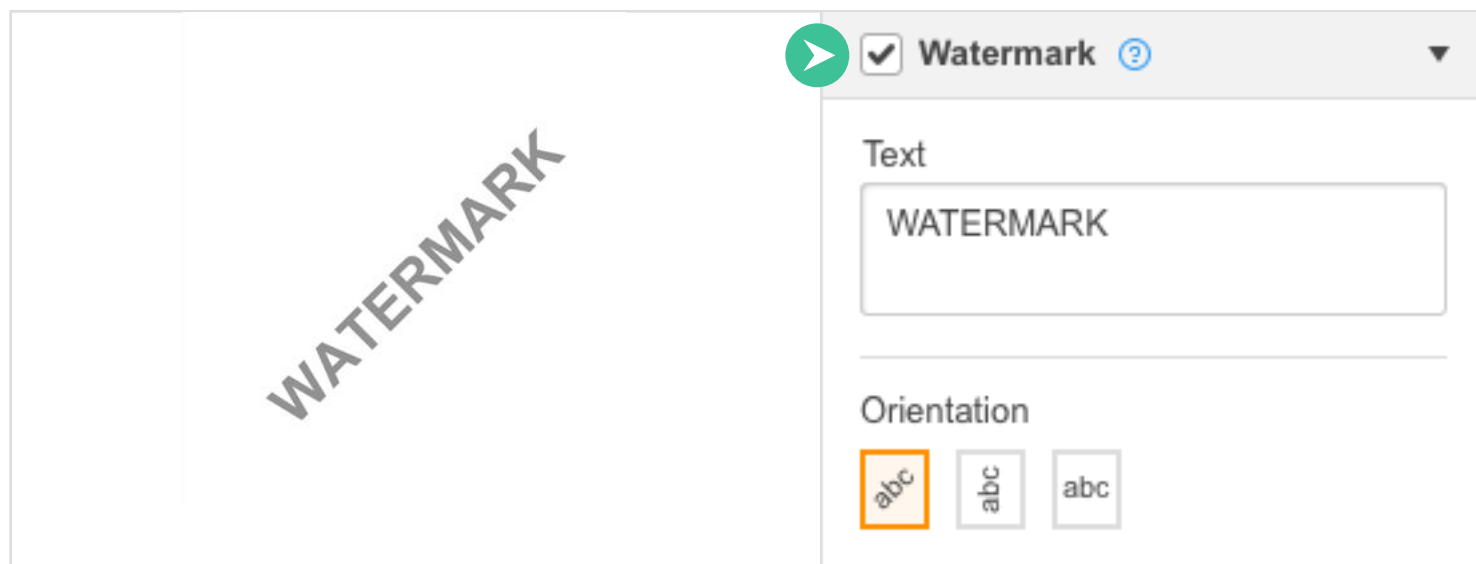
When you've finished adding fillable fields to your document, click the **Save** button in the top right corner of the page.

Adding a Watermark

Add a custom watermark to PDF documents.



Check the box and add the text that you want to appear in the watermark.



After the orientation, size and opacity of the watermark have been defined, you can see the changes to your document in real time — simply select the pages you'd like to apply your watermark to.

To remove the watermark, uncheck the box.


Adding Page Numbers

Number the pages of a document with just one click.



While editing a document, open the **Add Watermark** tab on the right.

Select the **Page Numbering** dropdown menu to change the format, size and position of the numbers on the page.



Page 2 of 11

Watermark ?

Date ?

Page Numbering ?

Display Format

Page 1 of 4

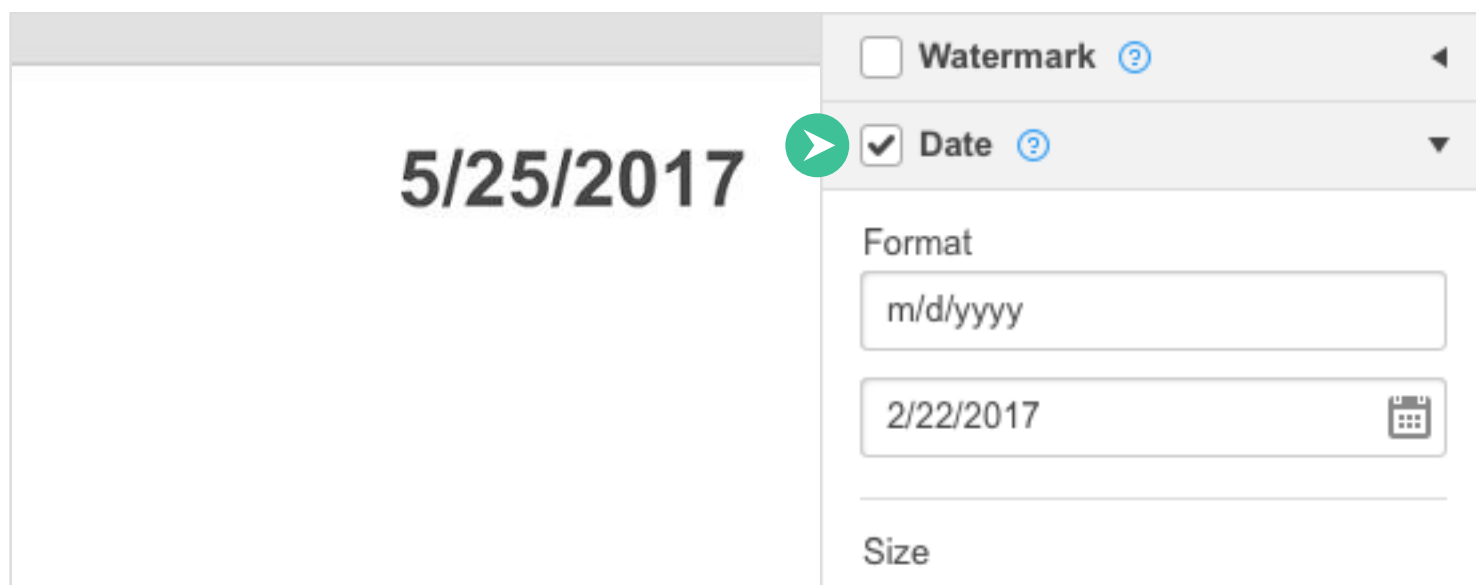
Size

To hide page numbers, uncheck the box.

Adding a Date

Add a date to a PDF document in one click.

Open the **Add Watermark** tab on the right and check the **Date** box. The Date menu will open and the current date will appear on the document.



5/25/2017

Watermark ?

Date ?

Format

m/d/yyyy


2/22/2017

Size

You can set any other date using the calendar and change the date format by selecting from the dropdown list.


Changes and Versions

Track all edits in automatically saved versions of the document



While editing a document, open the **Versions** tab on the right.

Here, you can view each saved version of the document (documents are saved each time you hit **DONE**).

Versions 
Current Version
September 23, 2017 15:36
March 10, 2016 09:12

To preview any previous version of the document, click on one of the timestamps listed.

Restoring a Previous Version

Clicking on **Restore this version** will revert your document to that previous version. You can undo this restore by returning to the Versions panel and choosing the most recent version.

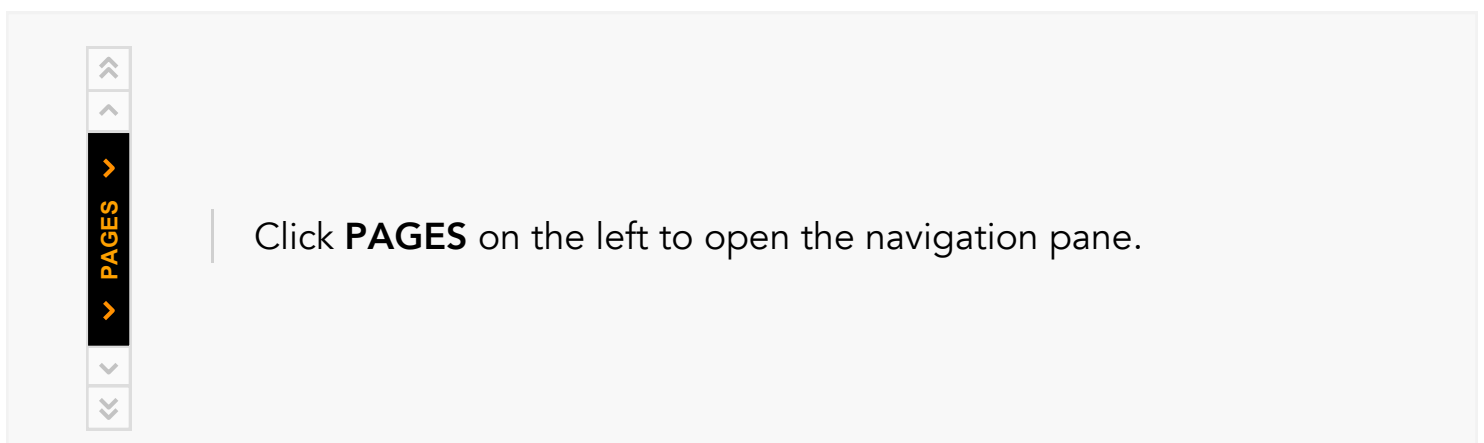


To exit the versions preview, click **Close** in the top right corner of the page.



Rearranging Pages

Change the order of pages in your document.



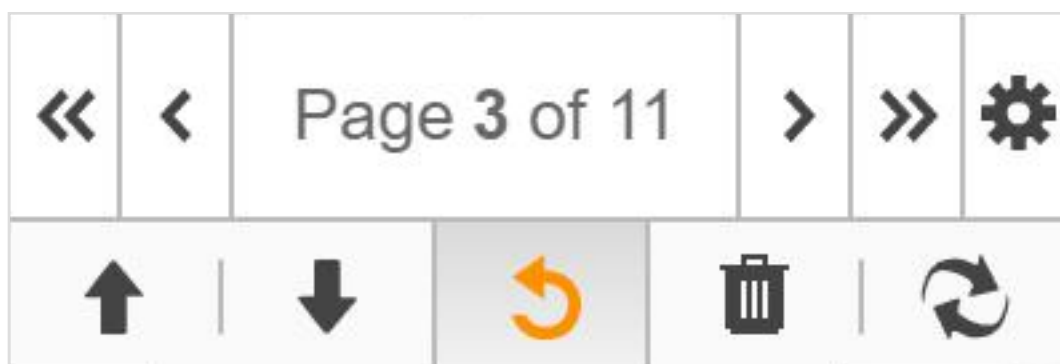
Select the thumbnail of the page you would like to move and then use the **Move Up** or **Move Down** icon at the top of the navigation pane.



Every time you click the **Move Up** or **Move Down** icon, the page will move one step up or down respectively.

Rotate Pages

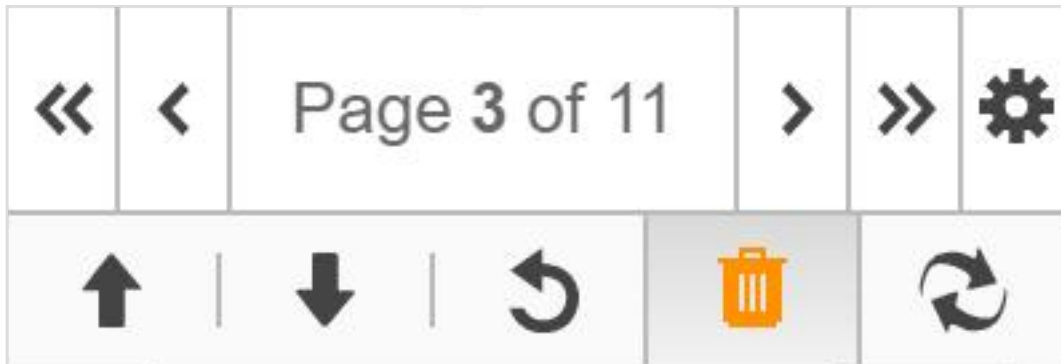
You can rotate any page in a PDF document. Select the page in the navigation pane and click the **Rotate** icon.



Every time you click the rotate tool, the page rotates counterclockwise 90 degrees.

Delete Pages

To delete a page, select its thumbnail in the navigation pane and click the trash can icon above.



Saving Documents

After you've finished editing the document, click **Done** in the top right corner.



In the next window, click **Save**.

Save Document

Save


You can also create a new version of the attachment by entering a new file name before you click **Save**.


Save Document

The new version will contain all the edits that you've made, while the original attachment will remain unchanged. You'll find the new version in the list of your attachments.

POSTS **ACTIVITIES** **NOTES** **ONENOTE**

Enter a note

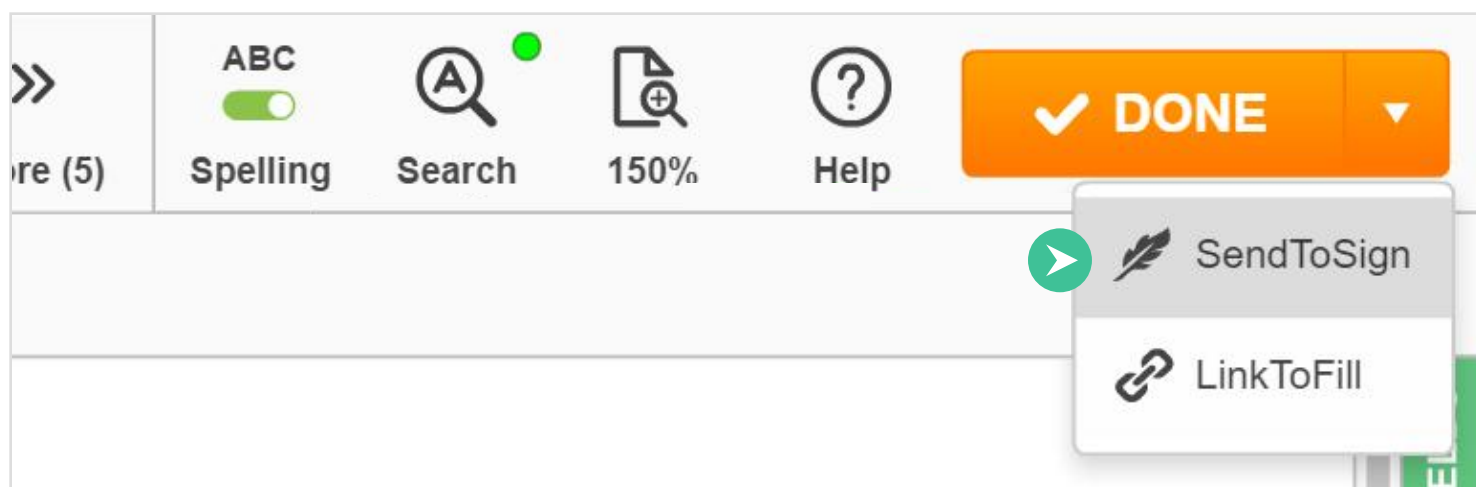
 **Sample_PDF_0001_V.2.pdf**
- Today 4:06:23 PM

 **Sample_PDF_0001.pdf**
- Today 4:01:11 PM

SendToSign: Requesting Signatures

SendToSign is an easy way to request signatures. You can send a document to up to 20 recipients and ask them to sign it.

While the document is open in the editor, click **Done** and select **SendToSign** from the dropdown menu.



Select Your SendToSign Method. There are two options for requesting digital signatures: **SendToEach** and **SendToGroup**.

1. Select Your SendToSign Method

SendToEach

Send up to 20 unique copies of this document to be individually signed by each recipient. You will receive a confirmation email as each copy is signed.

SendToGroup

Sign in Order ?

Send a single copy of this document to be signed by up to 20 recipients, in any order or in a specific order. You will receive a confirmation email once the document has been signed by all recipients.

SendToEach: Send up to twenty unique copies of a document to be individually signed by each recipient. You will receive a confirmation email as each copy is signed.

SendToGroup: SendToGroup allows you to send a single copy of a document to up to twenty people. Once all the recipients sign the document, you will receive a confirmation email.

To create your signature request, add the email address and name of the recipient(s).

2. Add Your Recipients

Recipient Email Recipient Name Options ^

Authenticate Signer ⓘ

Editing Permissions ⓘ

Require a photo for signature authentication ⓘ

Message

Subject: Digital signature request from

Please sign and return the linked document with PDFfiller. If you have any questions, please contact me.

[+ Add Another Recipient](#)

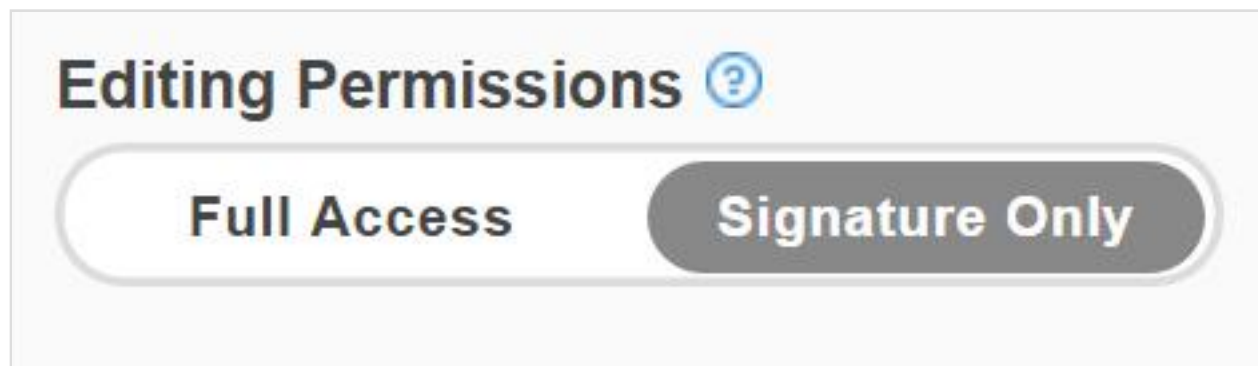
Signer Authentication

If you choose to enable two-factor authentication, move the slider to the right and enter the recipient's phone number.

Authenticate Signer ⓘ

The recipient will get a unique passcode via text message. To open the document, the recipient will have to enter this passcode.

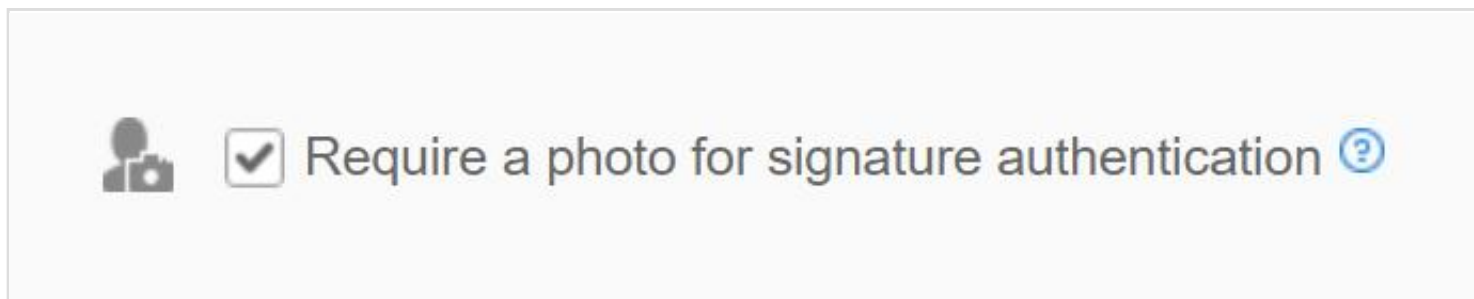
Editing Permissions



If you set the editing permissions to **Signature Only**, the recipient will only be able to sign and date the document. If you select **Full Access**, the recipient will also be able to edit the document using all our editing tools in addition to signing the document.

Request a photo for signature authentication.

If you select this option, the recipient will have to prove their identity by taking a photo with their webcam before returning the signed document.



Write a message to the recipient.

Message

Subject: Digital signature request from ...|

Please sign and return the linked document. If you ha

Add more recipients

 **Add Another Recipient**

You can set individual options for each new recipient.

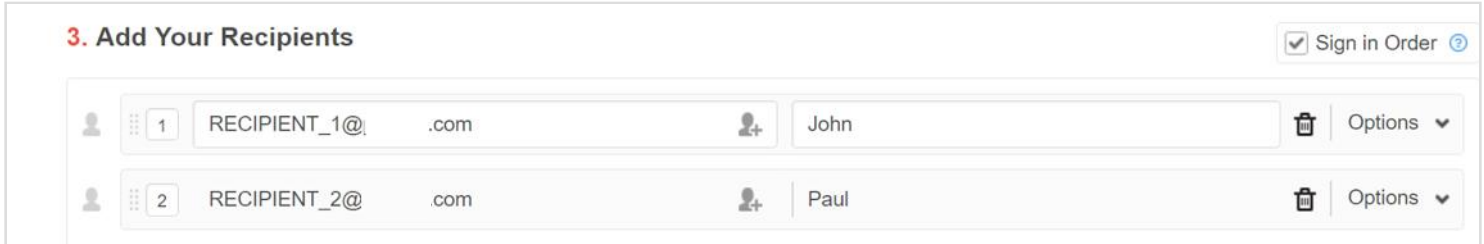
If you select to request signatures using **SendToGroup**, create an envelope name to label your group. Only you will be able to see this label.

2. Enter Your Envelope Name

Envelope #1|

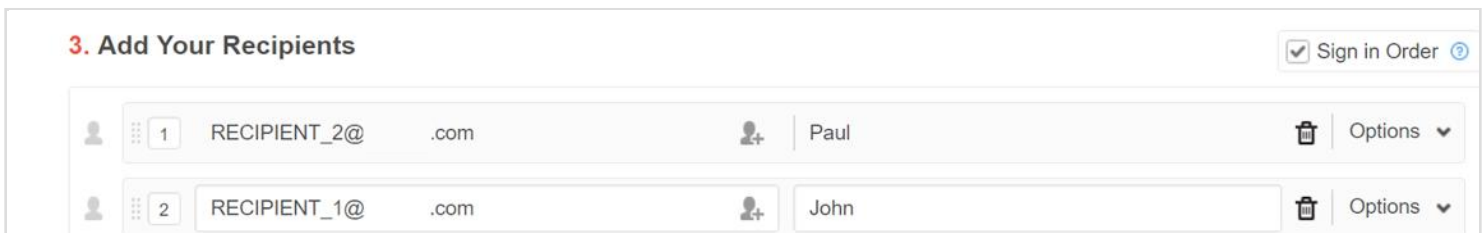
Use the **Sign in Order** option to set the order in which SendToGroup recipients receive their requests to sign the document.

Check the **Sign in Order** box and then either drag or type to the left of each recipient their sequence number to set the desired order.



3. Add Your Recipients Sign in Order [?](#)

	1	RECIPIENT_1@	.com		John		Options ▼
	2	RECIPIENT_2@	.com		Paul		Options ▼



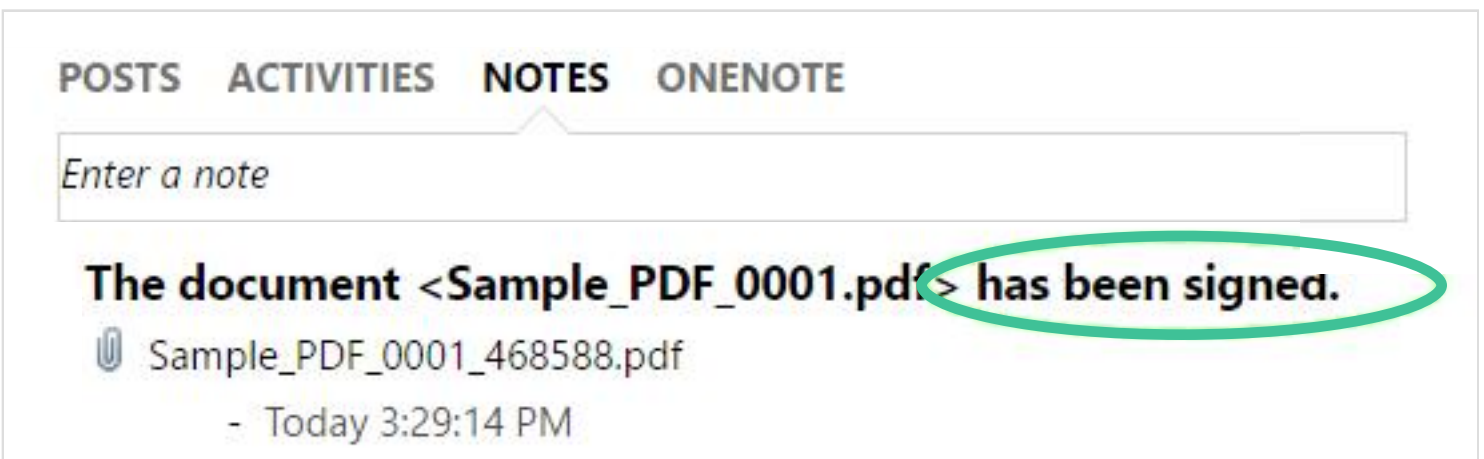
3. Add Your Recipients Sign in Order [?](#)

	1	RECIPIENT_2@	.com		Paul		Options ▼
	2	RECIPIENT_1@	.com		John		Options ▼

Finally, click **SendToSign** in the bottom right corner of the page.

The recipients will receive an email with your request to sign the document.
The link will open the document in the editor where the recipient will be able to sign it.

Once the document is signed, it will be automatically saved as an attachment to your notes where you'll be able to track the document's status.



POSTS ACTIVITIES NOTES ONENOTE

Enter a note

The document <Sample_PDF_0001.pdf> has been signed.

Sample_PDF_0001_468588.pdf

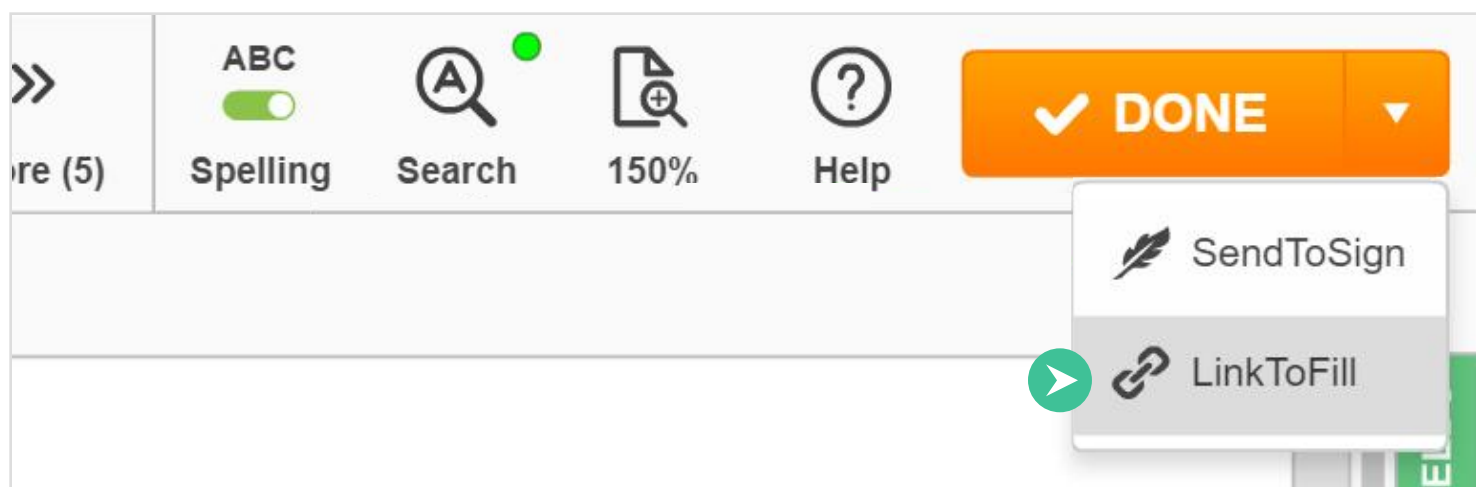
- Today 3:29:14 PM

Click the link to download the signed document to your local drive.

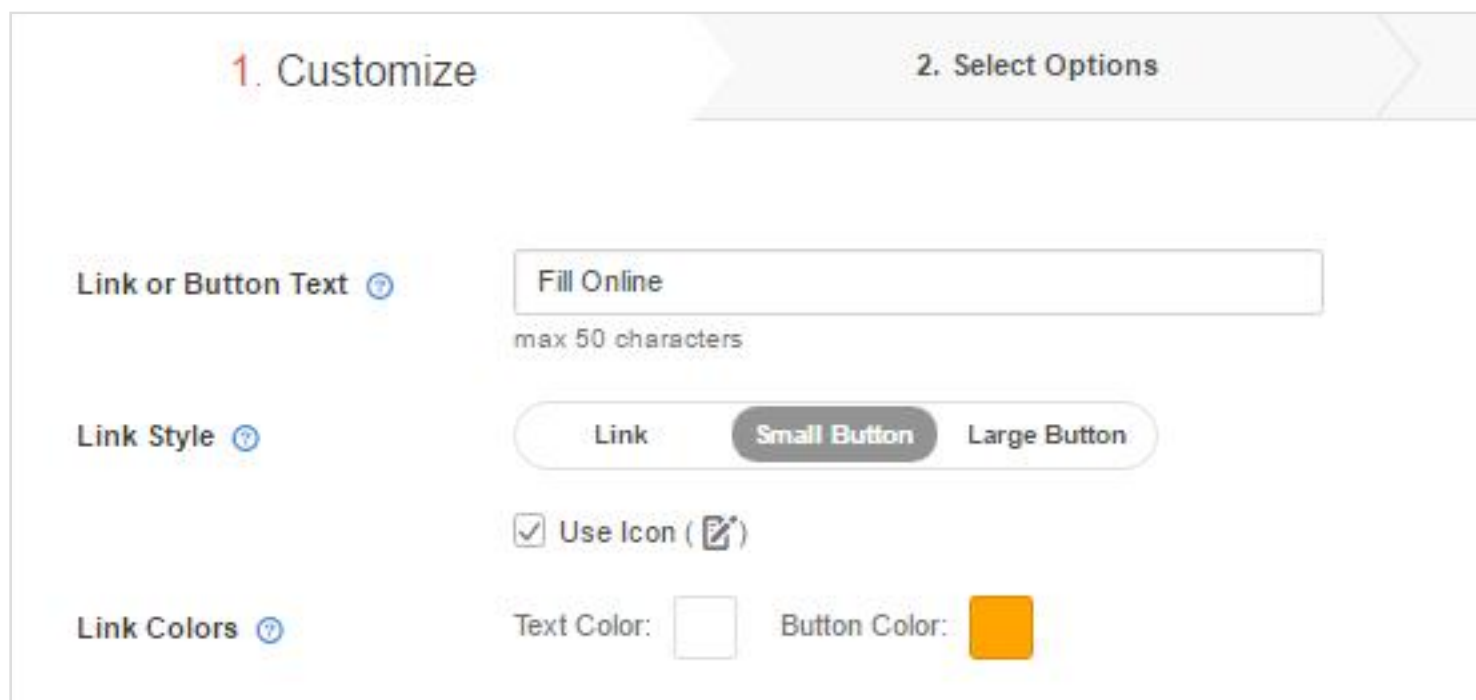
Hosting Fillable Forms

Make your document publicly accessible. Create a link to the document and publish the link on your website as a button or an HTML link.

While the document is open in the editor, click **Done** and select **LinkToFill** from the dropdown menu.



Customize the embeddable HTML link.

A screenshot of the '1. Customize' step in the DaDaDocs editor. The interface is divided into two sections: '1. Customize' and '2. Select Options'. Under '1. Customize', there are three main sections: 'Link or Button Text' with a text input field containing 'Fill Online' and a 'max 50 characters' label; 'Link Style' with three radio button options: 'Link', 'Small Button' (which is selected), and 'Large Button'; and 'Link Colors' with 'Text Color' (a white color swatch) and 'Button Color' (an orange color swatch). There is also a checked checkbox for 'Use Icon' with a link icon.

Customize your link's text. Type your own text in the text field; it cannot be longer than 50 characters.

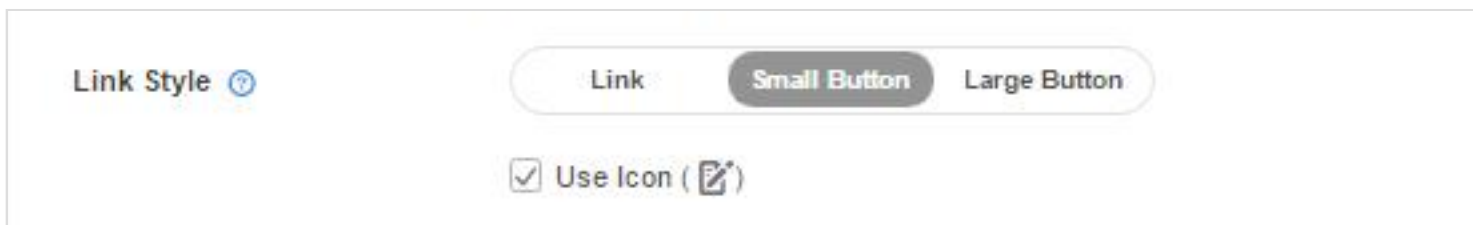


Link or Button Text ⓘ

Fill Online

max 50 characters

Choose a link style. There are three styles available: **text**, **small button** and **large button**



Link Style ⓘ

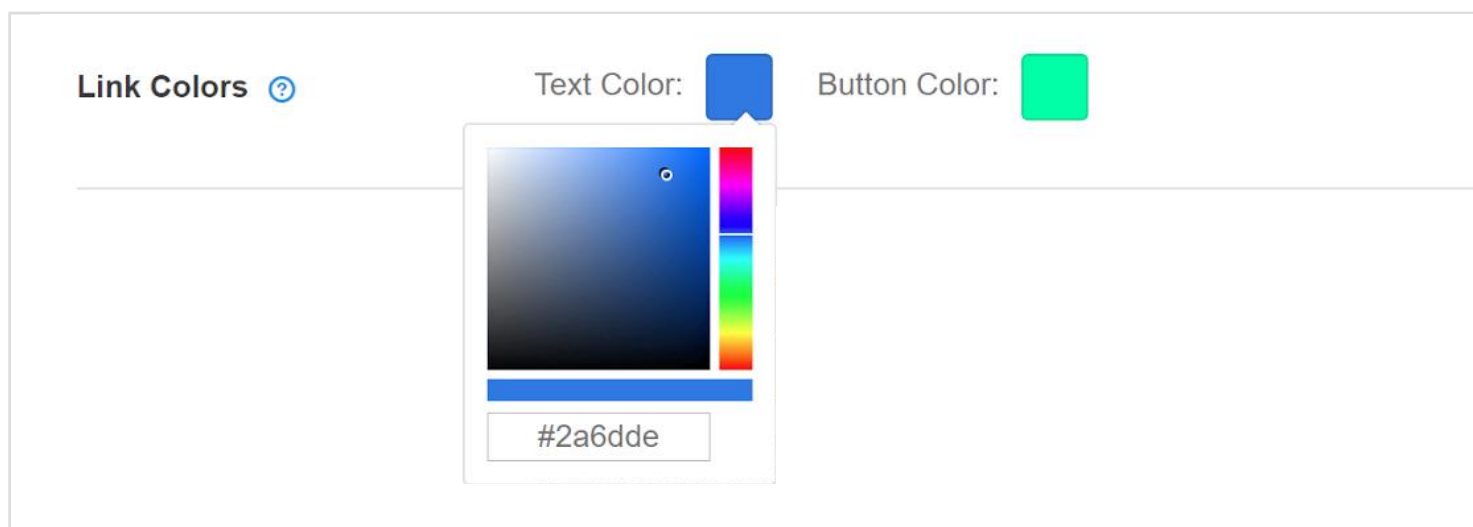
Link Small Button Large Button

Use Icon (📄)



You can also choose whether to use the document icon or not, just check or uncheck the corresponding checkbox.

Choose the link colors by clicking the colored squares.



Link Colors ⓘ

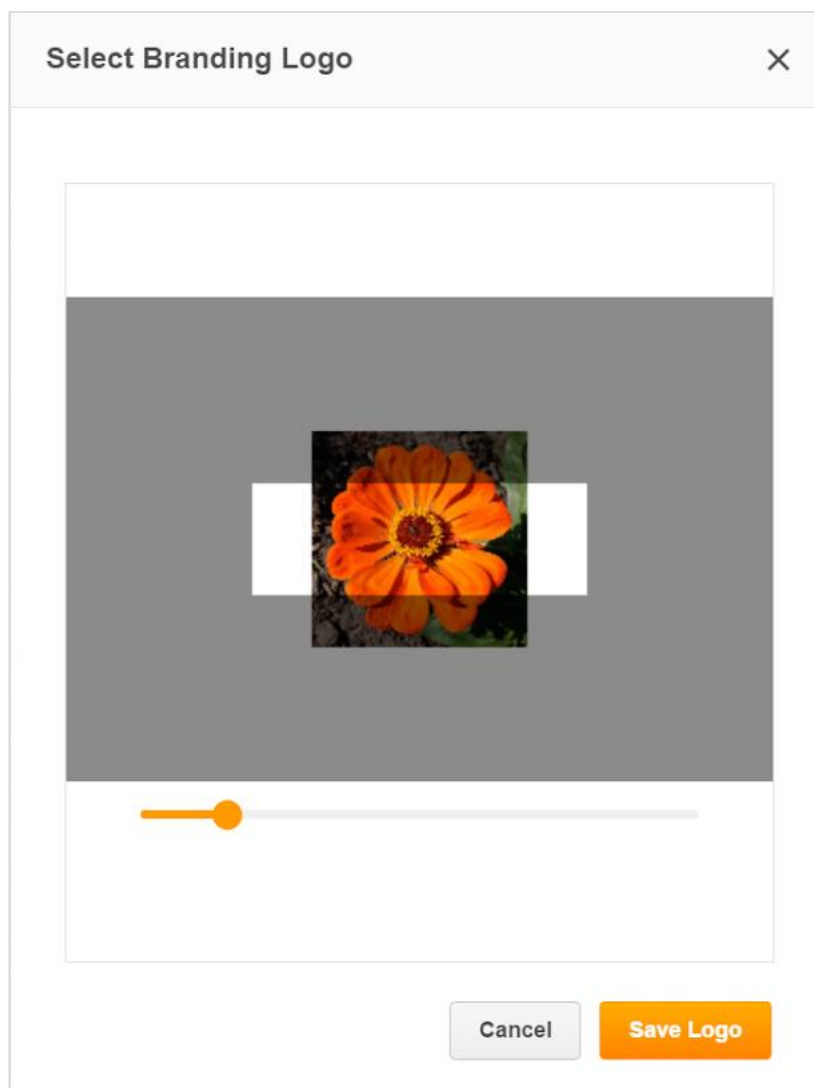
Text Color: ■ Button Color: ■

#2a6dde

Upload a custom logo for your document. Click the **Add New Logo** button and follow your browser's tips to upload an image from your computer. The image should be in JPEG, GIF or PNG format; its size cannot exceed 5 MB.



Use the slider to fit the image into the rectangular frame and click the **Save Logo** button.



Custom Logo and Branding 

Whoever fills the document will see your logo in the top left corner of the page. If you choose not to use this option, the DaDaDocs' logo will appear by default.

 |   To enter data on this form, click anywhere and begin typing. Click "DONE" to proceed.

Author's Info. Add the name, company and job title of the document's author.


Author's Info 

Welcome Agreement. Activate this option if you want to request the recipient's consent to the terms and conditions of the use of electronic records and signatures.

Welcome Agreement 

On Off

Message. Write a message such as instructions or a request.

Message 

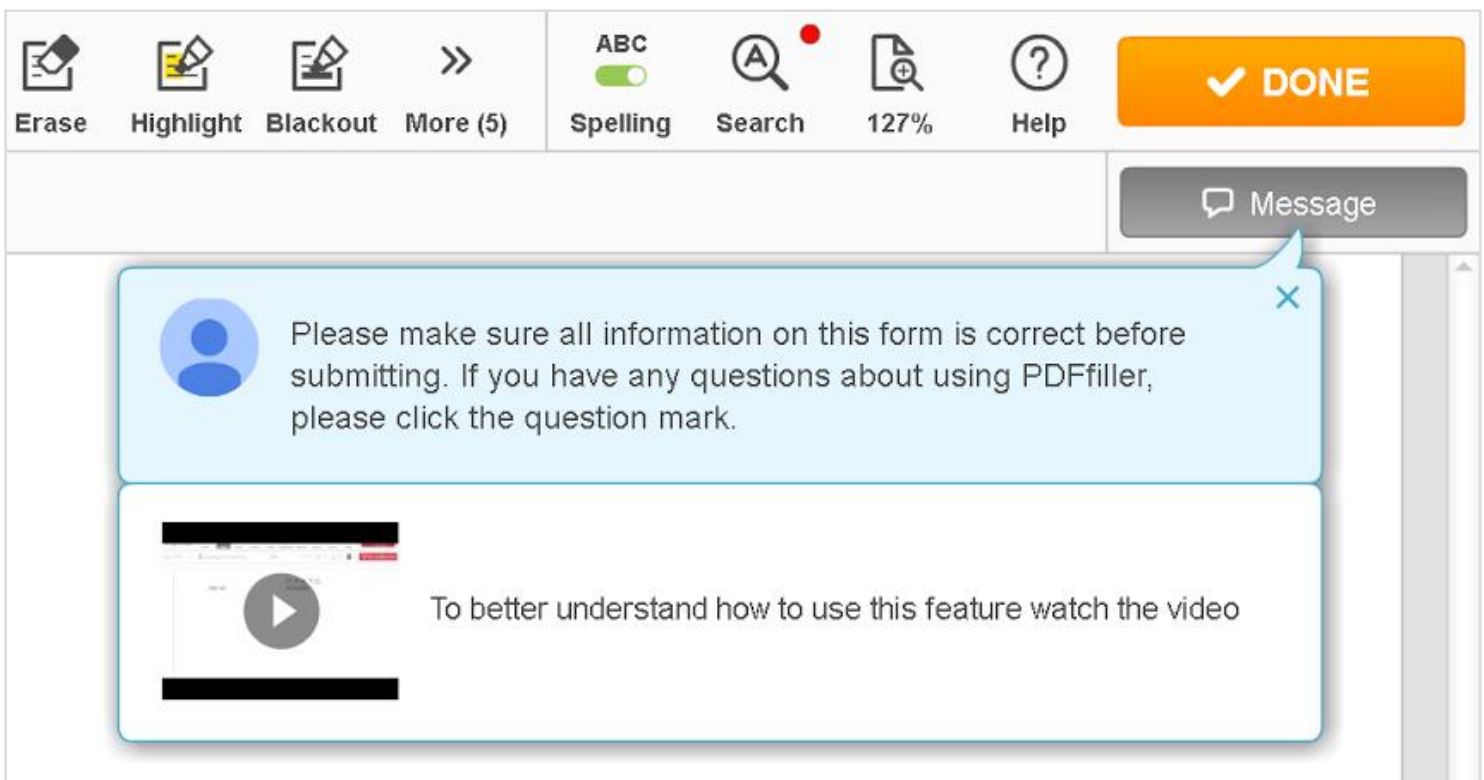
Please make sure all information on this form is correct before submitting. If you have any questions about using PDFfiller, please click the question mark.

Video URL. Add an instructional, marketing or welcome video to the document by inserting a link to the video that you want to attach. Note that the video has to be published on YouTube.

Video URL 

<https://www.youtube.com/watch?v=aOlVzNe8a0g>

Whoever opens the document will be able to watch the video.



The screenshot shows the PDFfiller toolbar with icons for Erase, Highlight, Blackout, More (5), Spelling (ABC), Search (A), 127% zoom, and Help (?). A 'DONE' button is visible on the right. A 'Message' button is also present. Below the toolbar, a light blue message box is displayed with a play button icon and the text: 'Please make sure all information on this form is correct before submitting. If you have any questions about using PDFfiller, please click the question mark.' Below this, a video player is shown with a play button icon and the text: 'To better understand how to use this feature watch the video'.

When you've finished customizing the HTML link, click **Select Options** in the bottom right corner of the page; this will open the **Select Options** tab.

2. Select Options

Select Options

Password Protection. Create a password to restrict access to the document. You will have to provide the password to those who need to access the document.

Password Protection 

Permissions. Select Full Access to enable recipients to edit the document using all of DaDaDocs' tools or select Signature Only to limit editing access to signature and date only.

Permissions 

Full Access

Signature Only

Signature Stamp. Choose whether you want to turn on the *Verified by PDFfiller* stamp next to every signature. It serves as a proof of notarization showing that a neutral third party has verified the date when a recipient signed the document.

Signature Stamp 

Enforce

Submission Requirements. You may request the name and email address from a person submitting the document.

Submission Requirements ?	<input type="checkbox"/> Require email address
	<input type="checkbox"/> Require name

Download Options. If you permit downloads, whoever fills the document will be able to download a copy of it.

Download Options ?	<input checked="" type="checkbox"/> Allow downloads
---------------------------	-----------------------------------------------------

Redirect After Submission. As soon as visitors of your site submit the document, you can redirect them to any webpage you like — just insert the URL address of the webpage in the text field.

Redirect After Submission ?	<input type="text" value="https://www.pdfFiller.com"/>
------------------------------------	--------------------------------------------------------

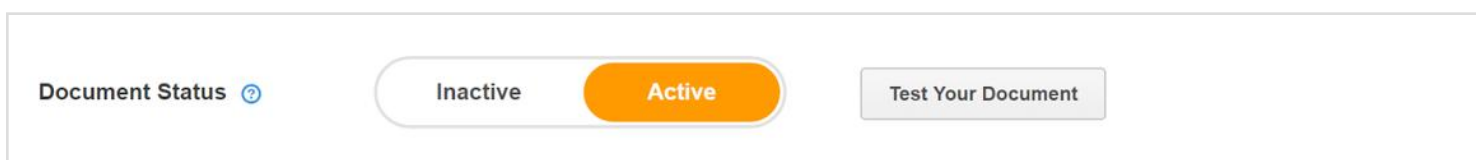
Notifications. You can choose whether or not to receive an email notification every time somebody submits the document. Enter the email addresses of those who need to receive notifications.

Notifications ?	<input type="radio"/> No notification	<input checked="" type="radio"/> Notification only	<input type="radio"/> Notification with PDF copy of document
Notification Email(s) ?	<input type="text" value="⊕ Add Email Address"/>		

After you've selected all the relevant options, click **Activate** at the bottom of the page; this will open the **Activate** tab.



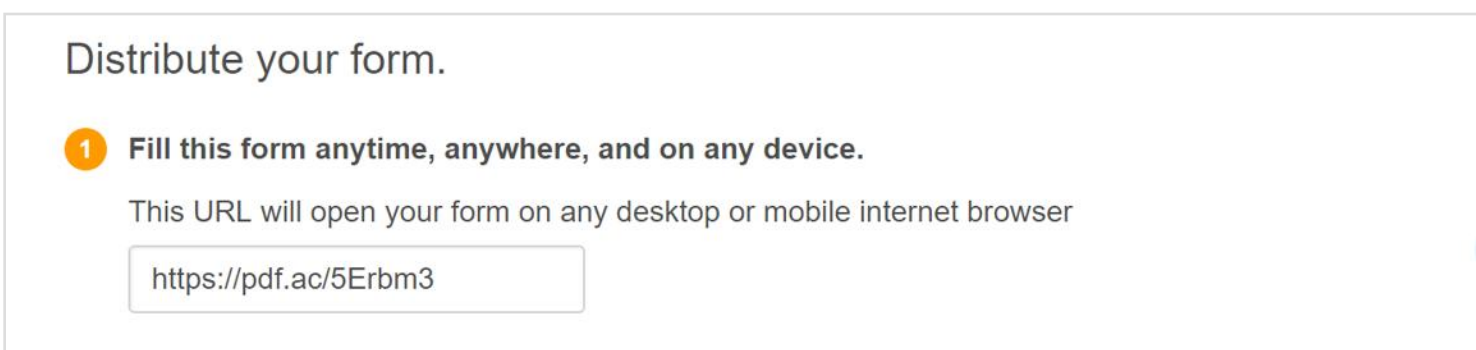
Setting the Document Status. Change the document's status to *Active* or *Inactive*.



Once the document is active, you will be able to distribute it using its URL address, HTML code, or QR code.

Distribute Your Document

URL. Provide a URL to those who need to complete your document.



Copied into the address bar of any web browser, the URL will open your document in the DaDaDocs editor for completing, signing and submitting.

QR Code. Download the QR code and add it to any printed document, booklet, leaflet, etc.



Smartphone users will be able to scan the code with their cameras to easily access the document on their devices.

HTML Link. To create a button or a text link on your website, copy and paste the HTML code to your website's HTML.

2 Add the Fill Form button to your website.

Copy and paste this code into your website's HTML to display the button or text link you have designed:

```
<link rel="stylesheet" type="text/css" href="https://www.pdfFiller.com/css_v2/link2fill-0.1.min.css">
<a href="http://pdf.ac/4JJVV1" target="_blank" title="PDFfiller.com: " style="color:#2e72e7;background:#00ff9c" class="pdfFiller-
fill_form_btn pdfFiller_fill_form_btn_large"><i class="pdfFiller_fill_form_btn_icon"><svg xmlns="http://www.w3.org/2000/svg"
```

Your website's visitors will be able to open the document in the DaDaDocs editor where they can easily fill, sign, and submit the document with just a few clicks.


Social Networks. You can also share your document through social networks such as Facebook, Twitter or Google+.

3 Share your form to Social networks.

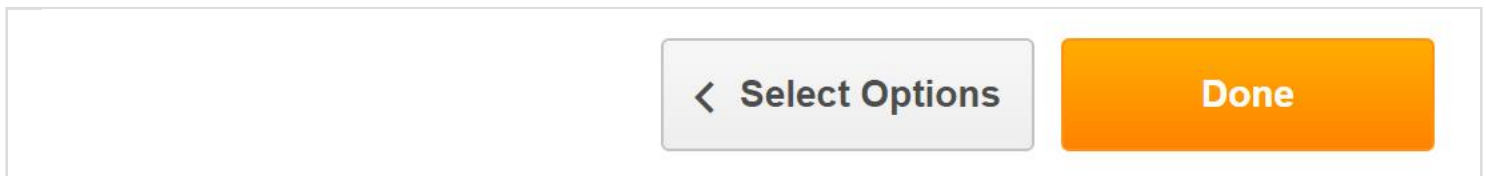
Click one of the buttons below and log into Facebook, Twitter, or Google+ to share your document's URL through these social networks.

 Share on Facebook

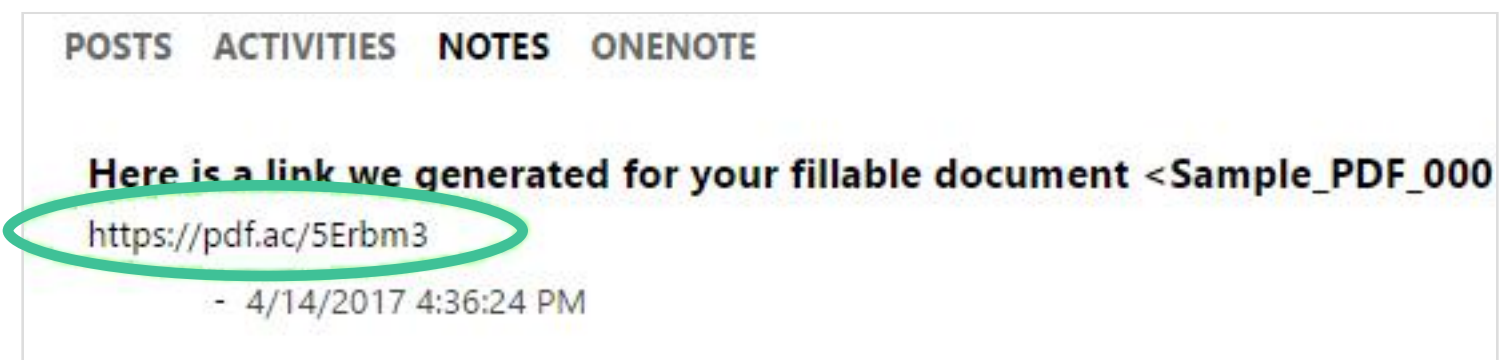
 Share on Twitter

 Share on Google

Finally, press the **Done** button in the bottom right corner of the page.



The the URL of the fillable document will be saved in your notes.



Every time somebody fills and submits the document, a new note will be generated and the document will be saved as an attachment to that note.



Click the link to download the filled document to your local drive.