



Creating EchoSign Forms with Text Tags

Overview

EchoSign allows you to easily place signatures, initial, check boxes and forms fields in your document simply by adding special text tags to your document. Tags may appear in any document type such as PDF, Microsoft Word, PowerPoint, Excel and simple text files (*.txt)

EchoSign will convert any text-based document containing those tags into a powerful EchoSign Smart Form, allowing you to collect data from your signers, position signature and initials fields in your documents, collect multi-party information from both the sender and signers and more.

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EchoSign Text Tags

EchoSign Text Tags are text strings that may appear anywhere within the content of your document specifying the location and type of field included in the document presented to your signers.

EchoSign Text Tags appear between two curly braces and contain the name of the field.

Each text tag specifies the following

- Field name – a unique name for each field
- Role – the person this field is associated with (e.g. sender, signer, etc.)
- Field type - Signature, initials, check box or a text field
- Required – Mandatory / Optional.
- Editable – Editable / Read Only
- Validation Rule – defining what type of allowed input (e.g. Dates, Numbers greater than 50, etc.)

For example:

- `{{Address_es_signer}}` – A text field called “Address” to be filled by the signer
- `{{*Zip2_es_signer2.zip}}` – A mandatory Zip code fields called “Zip2” to be filled by the second signer
- `{{_es_signer_signature}}` – A signature field to be signed by the signer

Text Tags are converted to EchoSign Smart Form fields.

When the document is uploaded to the service, EchoSign overlays a rectangle covering the entire span of the Text Tag (from the beginning “{{” to the ending “}}”) and converts the Text Tag into its corresponding EchoSign form fields. The length of the Form Field can be increased by adding white space characters at the beginning of the Text Tag immediately after the “{{” or at the end of the Text Tag just before the “}}”. Decreasing the size of the Form Field can be achieved by reducing the font size of the Text Tag to get the appropriate length.

For example:

1. In Microsoft Word:

This Agreement is made effective as of {{_es_signer_date}}, between My company.com ("Company") and {{_es_signer_company}} ("Contractor") {{_es_signer_initials}}

2. When signing:

This Agreement is made effective as of Date Signed between My company.com ("Company") and Company ("Contractor") Initials

3. In the signed document:

This AGREEMENT is made effective as May 7, 2009, between MyCompany.com ("Company") and MyCompany.com ("Contractor").



Collecting Data from Specific Signers

Fields can be assigned to specific signers by appending an EchoSign-specific suffix to their name.

A field that does not have such a suffix (e.g. `{{address}}`) can be filled by any signer.

After it has been filled, the field will be locked to prevent subsequent signers from changing its value.

Associating a Field with a Specific Signer

You can instruct EchoSign to distinguish between fields that need to be filled by the sender or the signer by adding a suffix to their names. For senders, add `_es_sender`. For signers, add `_es_signer`.

If you have a document that needs to be signed by multiple signers, you may associate fields with these signers using `_es_signer1`, `_es_signer2`, etc.

For example:

- `{{price_es_sender}}` – An text field to be filled by the sender
- `{{street_es_signer}}` – A text field to be filled by the first signer that's not a sender
- `{{city_es_signer1}}` – A text field to be filled by the first signer, even if they are a sender.

Sender Pre-Fills Data

In some cases, the sender is not required to sign the document but needs to enter data before the document is sent out for signature.

By adding the `_es_prefill` suffix to the names of relevant fields, EchoSign allows the sender to complete (pre-fill) those fields before sending the document for signature.

For example, `{{price_es_prefill}}` would create a text field to be pre-filled by the sender before the document is sent for signature.

Note: Pre-fill is enabled by default only for documents uploaded to your EchoSign library.
Contact EchoSign support to enable pre-fill for documents sent directly from the EchoSign send page.



Fields Types

Text Fields

Unless specified otherwise, a field is an editable text field. See Section Editable / Read-Only Fields below on how to make fields read-only.

For example: `{{comment_es_signer}}` is an editable text field

Signature and Initials

You may position EchoSign signature or initial fields by adding a suffix to designate the type of the signature field and whether it should be signed by the sender or the signer.

To position a signature field, append `_signature` to the field name.

To position an initials field, append `_initials`

For example: `{{signHere_es_signer_signature}}` or `{{clause1_es_signer_initials}}`

When sending a document containing those fields for signature, signature and initials fields would require the signers to enter their signature or initials at the designated locations:

For example:

1. When Signing:

Sign Here	Signature of U.S. person ▶	 Click to Sign
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2. And, in the signed document

Sign Here	Signature of U.S. person ▶	
Casey Jones (May 6, 2009)		

Optional Signature and Initials

You may position EchoSign optional signature or optional initial fields by adding a suffix to designate the type of the signature field and whether it should be signed by the sender or the signer.

To position an optional signature field, append `_optsignature` to the field name.

To position an optional initials field, append `_optinitials` to the field name.

For example: `{{signHere_es_signer_optsignature}}` or `{{clause1_es_signer_optinitials}}`

Special Signer Fields

You may position these EchoSign fields in your document by appending their names to the field name

Data entry fields

- `_title` – The signer's job title.
- `_company` – The signer's company.
- `_fullname` – The signer's full name

Read-only fields

- `_date` – signature date
- `_email` – the signer's email address

For example: `{{_es_signer_title}}`, `{{_es_signer_company}}`, `{{_es_sender_fullname}}` etc.

Signature Block

If no signature field was placed in the document for a specific signer, EchoSign will automatically place a signature block at the bottom of the document.

Depending on your account configuration, signers may also be required to provide their title and company. In that case, EchoSign will present a signature block containing those fields in case they were not placed in the document.

You may position the entire EchoSign signature block in your document by appending `_signatureblock` to the end of the field name.

For example: `{{_es_signer_signatureblock}}`, `{{_es_sender_signatureblock}}`

Check Boxes

You can position a checkbox using text tags by placing the Check Box tag in your documents.

For example

- `{{[]}}` – A check box.
- `{{[x]}}` – A check box, checked by default.
- `{{[_es_signer1]}}` – A check box, assigned to the first signer.
- `{{[*]}}` – A mandatory check box.
- `{{[!]}` – A read-only check box.

Mandatory / Read Only Fields

You may specify if a field is required or optional. EchoSign ensures that a signer cannot sign the document before all mandatory fields are filled.

By default, all fields are optional, with the following exceptions:

- Signature and Initial fields are mandatory by default.
- Title and Company are mandatory if your account preferences require them to be part of the signature block. Other text fields are optional by default.

A mandatory field is marked with an asterisk (*) prefix to its name.

For example:

- `{{*phone_es_sender}}` – A mandatory text field to be filled by the sender
- `{{address_es_signer}}` – An optional text field to be filled by the signer

Required fields will be outlined in red when signing.

Job Title:	Please enter your job title...
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Editable / Read-Only Fields

By default, all fields are editable. Exceptions include some special signer fields (signer name and signature date) that are read only by default. (See [Special Signer Fields](#)).

Read-only fields are useful when automatically merging data into the document using EchoSign's Salesforce Data Merge or with EchoSign's MegaSign Data Merge. Read only fields ensure the signer cannot change the merged data when signing.

A read-only field is marked by adding an exclamation mark (!) prefix to the field name.

For example:

- `{{!price}}` – a read-only text field to be filled by Data Merge.

Masked (Protected) Fields

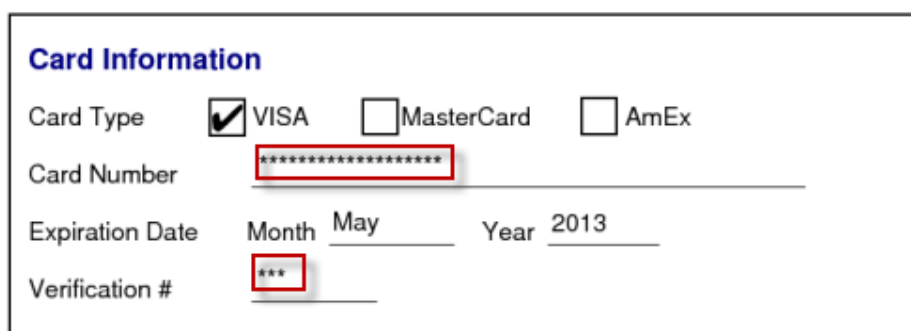
Masked fields allow you to mask data collected from signers in the signed PDF. You may still export that data when you're logged in to your EchoSign account or using the EchoSign API.

A masked field is marked with a `'.mask'` suffix to its name.

For example:

- `{{*cc_es_signer.mask}}` – a mandatory text field that will be masked in the signed PDF.

Masked fields will appear as a sequence of asterisks in the signed document. For example:



Card Information

Card Type ☒ VISA ☐ MasterCard ☐ AmEx

Card Number *****

Expiration Date Month May Year 2013

Verification # ***

Validation Rules

EchoSign supports a long list of validation types specified by adding a suffix to the text tag preceded by a dot (.).

For example:

- `{{*Mobile_es_sender.phone}}` – A mandatory phone number
- `{{Birthday_es_signer2.date}}` – An optional date field

Some field validation types may have additional parameters that narrow down the allowed values in the field

- `{{duration_es_signer.num(>=0,<=60)}}` – An optional number between 0 and 60
- `{{tenNum.string(char=num,maxlen=10)}}` – An optional field allowing up to ten digits

Supported Field validation rules

Validation Type	Parameters	Parameter values	Validation Rule Samples
String	'char'	alpha – Letters only	.string .string(char=alpha)
	'char'	num – Digits only	.string(char=num)
	'char'	alphanum – Letters & Numbers	.string(char=alphanum)
	'char'	maxlen - Specify a max field size	string(maxlen=10) .string(char=alpha,maxlen=10)
Number	'>=', '<='	number	.num .num(<=1000) .num(>=50,<=100.5)
Currency	'country'	'us' – Default 'uk'	.curr(country=us)
	'>=', '<='	number	.curr(country=uk,<=1000) .curr .curr(<=1000)
Percent	'>=', '<='	number	.pct .pct(>=0,<=50)



Validation Type	Parameters	Parameter values	Validation Rule Samples
Date	<i>'format'</i>	Default – all U.S. Date formats 'mm/dd/yy' 'mm/dd/yyyy' 'dd/mm/yy' 'dd/mm/yyyy'	.date .date(format=dd/mm/yy)
Time			.time
Email			.email
Zip	'country'	'us' – Default 'uk'	.zip .zip(country=uk)
Zip+4			.zip4
Phone	'country'	'us' – Default 'uk'	.phone .phone(country=uk)
Social Security Number			.ssn

Examples

Signature fields

- `{{_es_signer_signature}}` – A signature field assigned to the signer.
- `{{_es_signer_initials}}` – An initials field assigned to the signer.
- `{{_es_signer_signatureblock}}` – A signature block assigned to the signer.

Optional Signature fields

- `{{_es_signer_optsignature}}` – An optional signature field assigned to the signer.
- `{{_es_signer_optinitials}}` – An optional initials field assigned to the signer.

Special EchoSign fields

- `{{_es_signer_title}}` – A field for the signer to enter their title.
- `{{_es_signer_company}}` – A field for the signer to enter their company name.
- `{{_es_signer_fullname}}` – A field for the signer to enter their full name.
- `{{_es_signer_date}}` – A read-only field containing the date of the signer's signature.
- `{{_es_signer_email}}` – A read-only field containing the signer's email address.

Prefill

- `{{price_es_prefill}}` – A field the sender fills in before sending the document is sent.

Text fields

- `{{address_es_signer}}` – An optional for the signer's to enter their address.
- `{{*phone_es_signer}}` – A mandatory field for the signer to enter their phone number.
- `{{!price}}` – A read-only field. Signers cannot change the value of this field.

Check Boxes

- `{{[]}}` – A check box.
- `{{[x]}}` – A check box, checked by default.
- `{{[]_es_signer1}}` – A check box, assigned to the first signer.
- `{{[*]}}` – A mandatory check box.
- `{{[!]}` – A read-only check box.

Masked Fields

- `{{*cc_es_signer.mask}}` – a mandatory text field that will be masked in the signed PDF.

Field Validation

- `{{*Mobile_es_sender.phone}}` – A mandatory phone field allowing US phone number format
- `{{Birthday_es_signer2.date}}` – An optional date field allowing dates in US date formats
- `{{d_es_signer.num(>0,<60)}}` – An optional number field allowing values between 0 and 60
- `{{zip_es_signer.zip.mask}}` – A Zip code field that will be masked in the signed document.