

Creating Tick Marks with Adobe Acrobat 10/11 in Tax Documents

This document provides tips on how to use standard Adobe Acrobat tools to add tick marks to scanned tax documents in the form of PDF files.

Of the many enhancements to Adobe Acrobat since the 2007 version, the ability to easily create and manage tick marks has proven an effective way to smooth the approval and comment processes for faster internal communication and remediation of review issues in a form or document.

These tick marks – sometimes but not always a check mark – can be used in a standard document or tax return to indicate approval or status. Previously, proofing meant annotating draft copies of forms or attaching “sign off” cover sheets for each document. But with the introduction of sophisticated document management systems, these methods have been largely replaced by tick marks.

Requirements:

Adobe® Acrobat® Standard 10.0 or 11.0

GruntWorx tested the creation of tick marks in Adobe Acrobat Standard 10.0 and 11.0, using GruntWorx PDF file output. The steps outlined below should work with any standard PDF file, and may also work with earlier versions of Acrobat software, with some modifications.

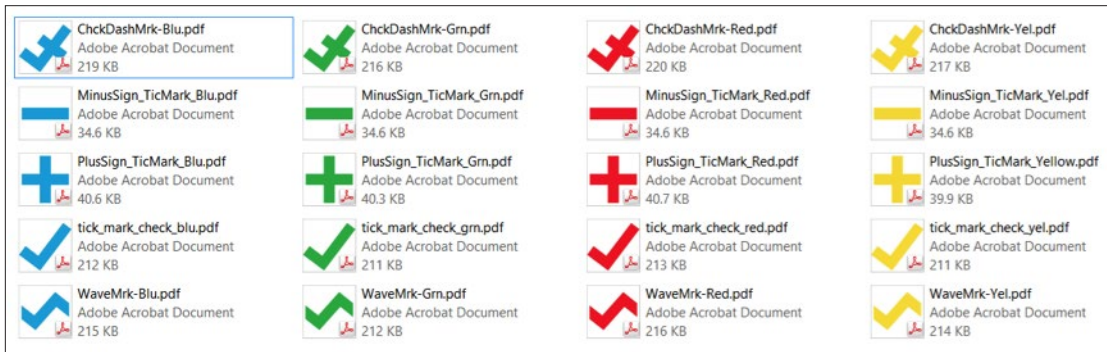
Resources for Tick Marks

NOTE: Adobe Acrobat comes pre-configured with a rich array of marks that are accessible from the menus of the application. Given this, the first decision to make is whether customized tick marks are needed at all.

Fortunately, you can obtain images to use as custom tick marks from both Adobe Acrobat and GruntWorx. There are at least four sources that tax and accounting firms may draw upon for easy use.

1. Download a custom set of accounting tick marks from http://www.gruntworx.com/wp-content/uploads/2015/05/GruntWorx_tick_marks.zip

Here's what they look like:

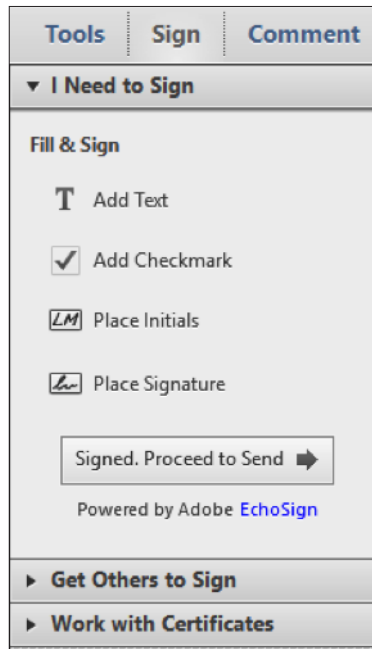


You can download the GruntWorx tick mark images and save them in a directory or file folder where you can locate them later. For example, download the tick mark images to your My Pictures folder.

These will be installed using the instructions provided by Abode at <http://helpx.adobe.com/acrobat/using/adding-stamp-pdf.html> - Note: Refer to the “Create a custom stamp” section. Also refer to instructions at the end of this document.

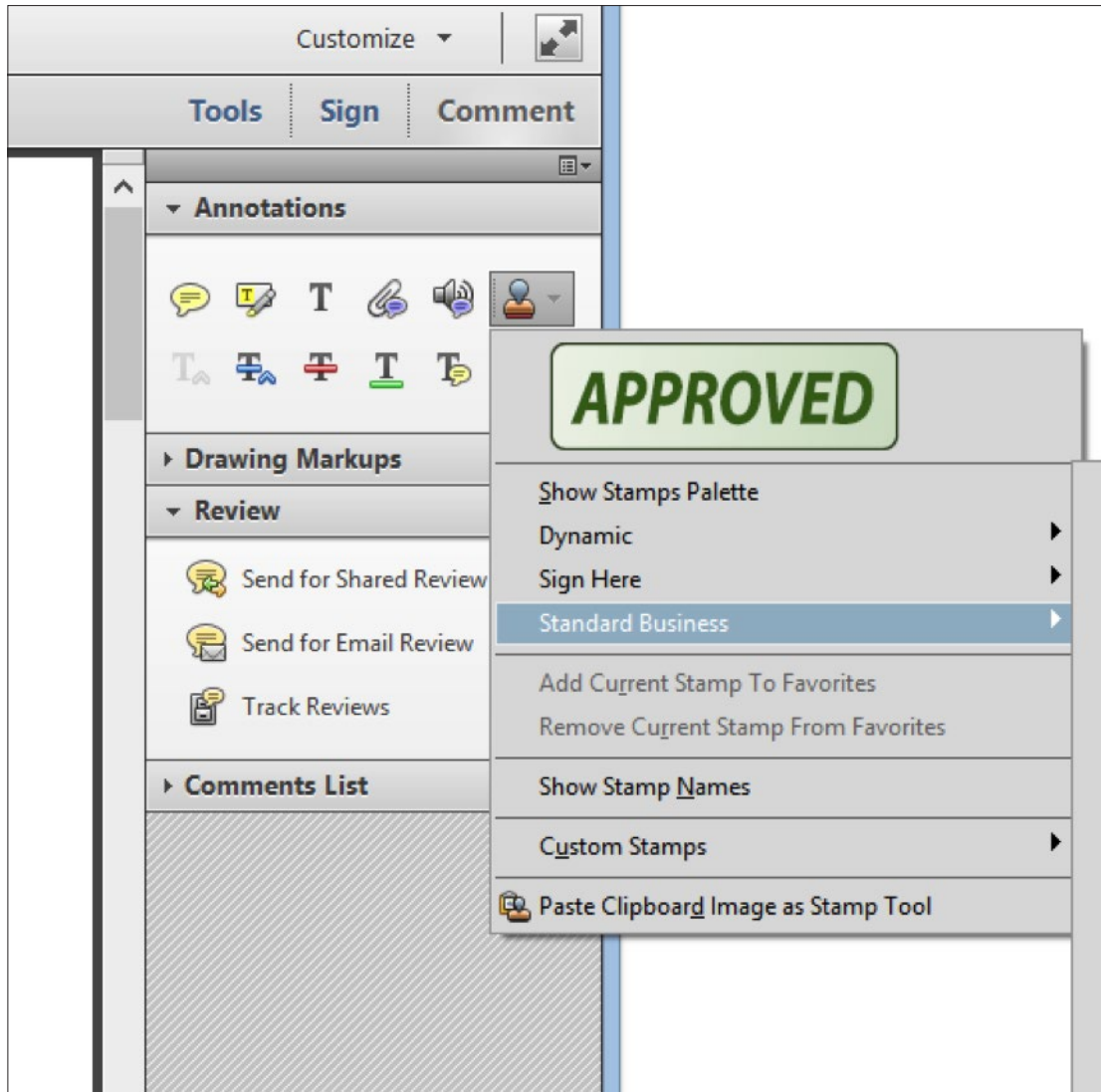
2. Use the Business Tick Mark set included with Adobe Acrobat 11.0

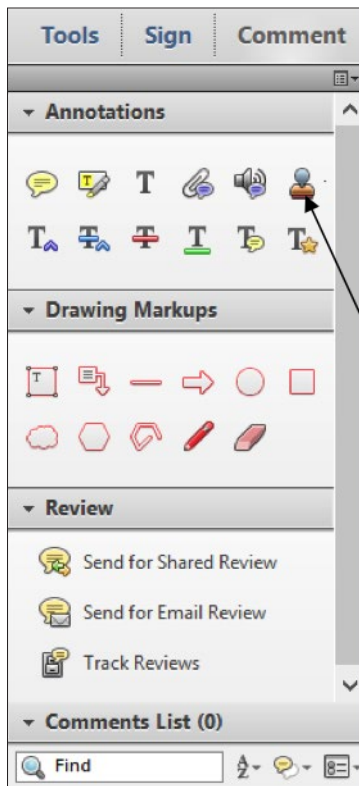
There are several sets included, beginning with the most common ones, found under the “Sign” menu in the upper right hand corner of the screen:



In Version 11, others are included under the “Comment” menu, also located in the upper right corner of the screen. Simply click on “Comment, then on one of the three palettes provided – Dynamic, Sign Here, or Standard Business.

In Version 10, these palettes are not seen until the “Stamp Tool” is installed on the Quick Tool Toolbar.





3. The Stamp Tool is located under the "Comment" Menu and provides its own array of stamps, including this set offering additional information (like date, time, and sign off):

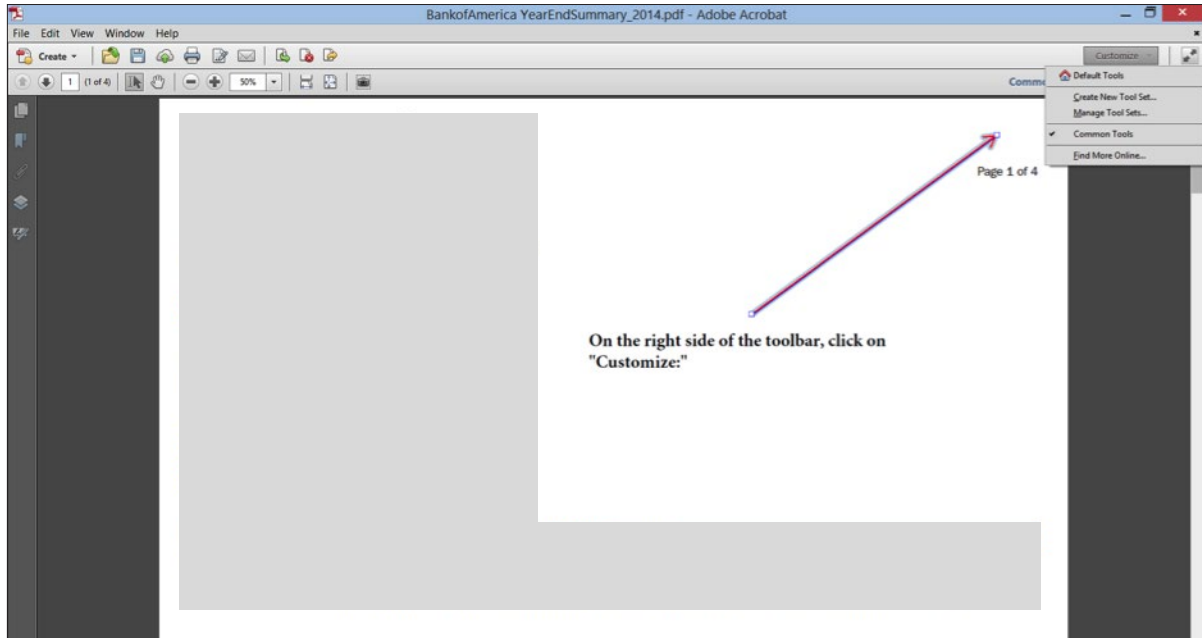


4. Use any graphic image or dynamically-formatted image from any clipart source, including the Microsoft Office Clipart Library, with additional customized sets available from the Acrobat User's Group at <http://acrobatusers.com/tool-sets-exchange?trackingid=JZXYP>

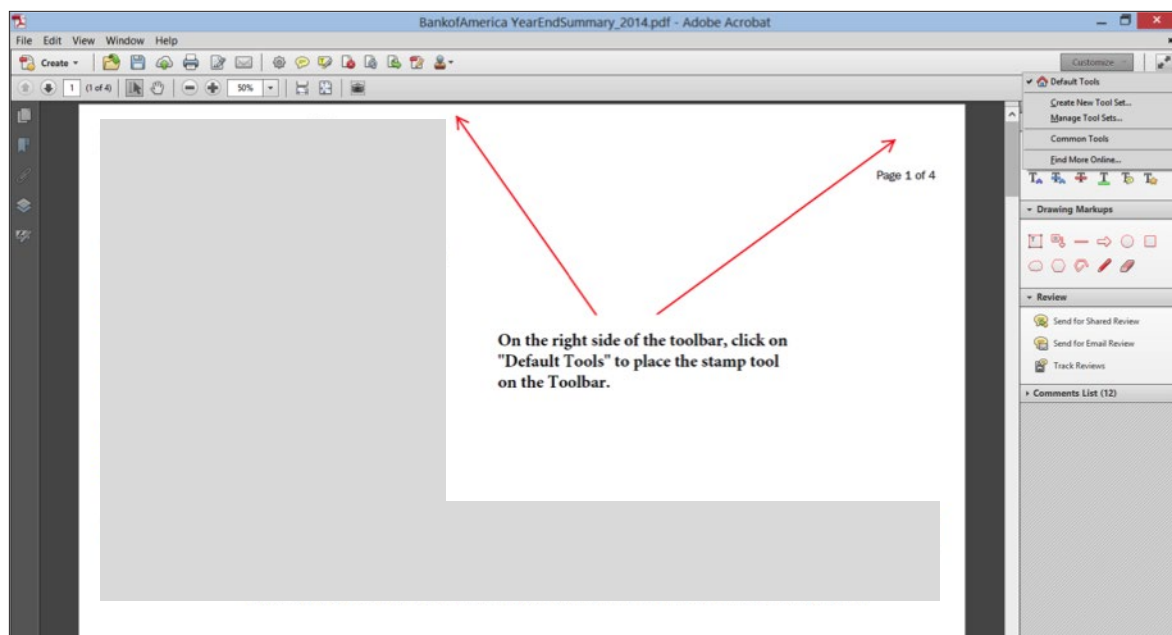
Adding the Acrobat Stamp tool to the toolbar:

If you decide to download images from GruntWorx or some other source, follow the instructions below when creating a custom stamp from these images.

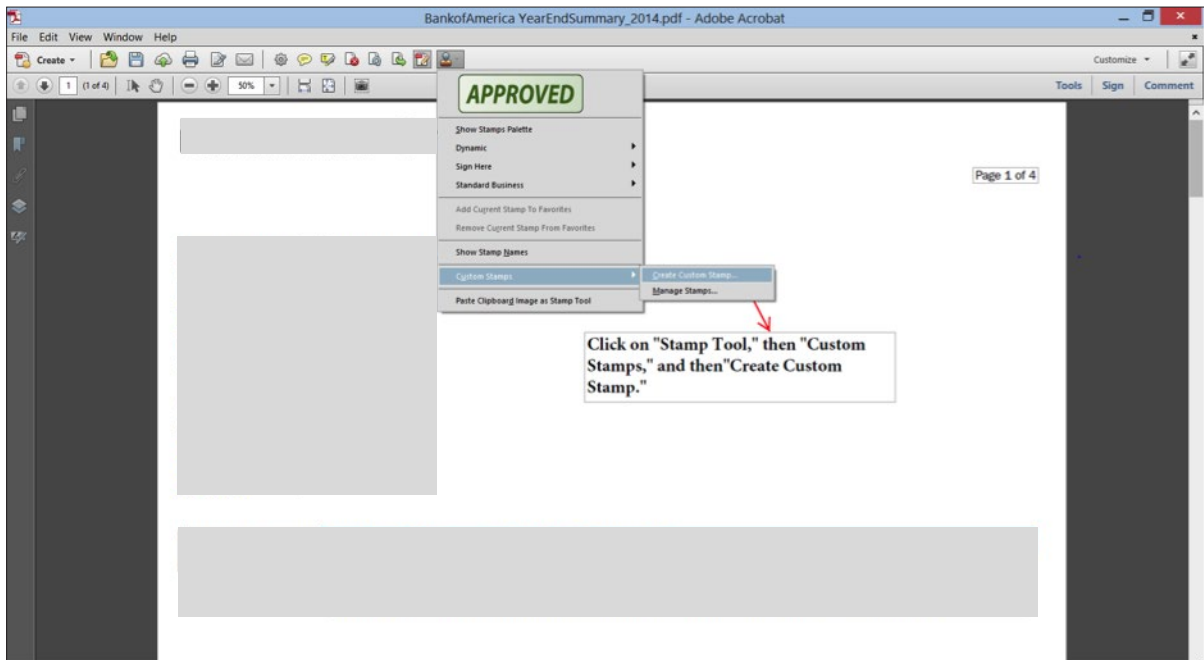
- To access the tick marks included in Adobe Acrobat, click on “Customize.”



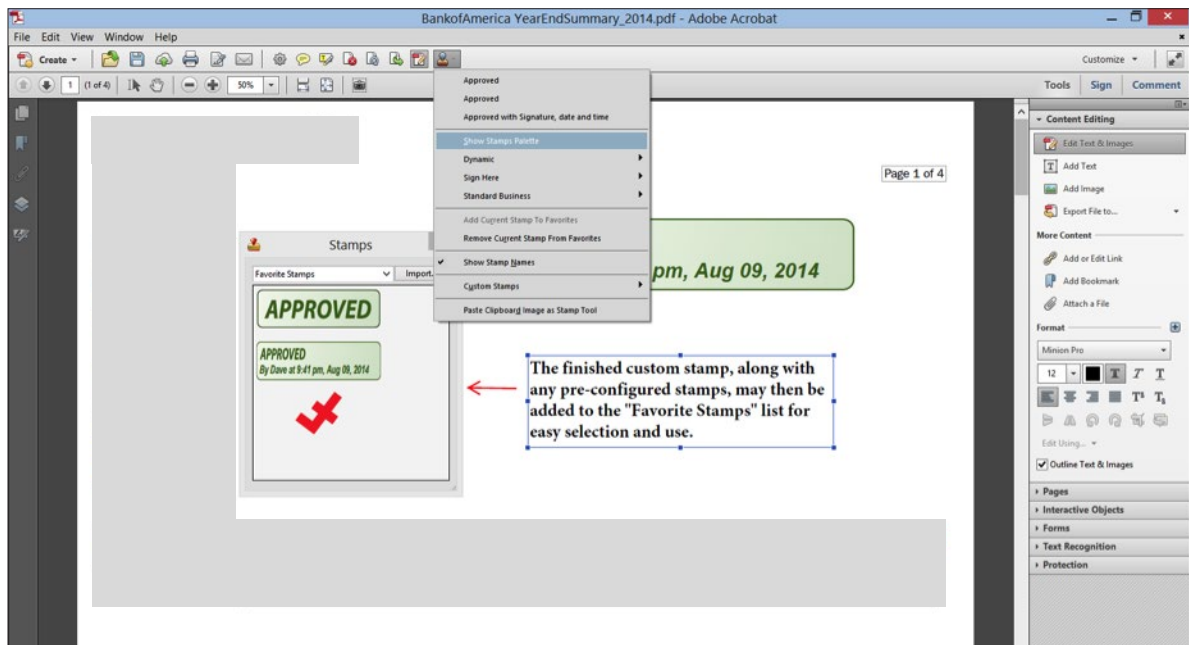
- Click on “Default Tools” to place the Stamp Tool on the Quick Tools Toolbar:



- Click on the “Stamp Tool,” then “Custom Stamps,” and then “Create Custom Stamp.”



- Unzip the file from GruntWorx to select the stamp to add, one-by-one. This will bring up a dialogue box to select the image to use. Consider adding a custom category in the drop-down list such as “tick marks” for the “Create Custom Stamp” dialog box:



Acrobat generally requires that you click on the stamp icon in the toolbar at the top of the application each time you wish to insert a tick mark. Note that the toolbar must be configured to show a Stamp Button before this will work.

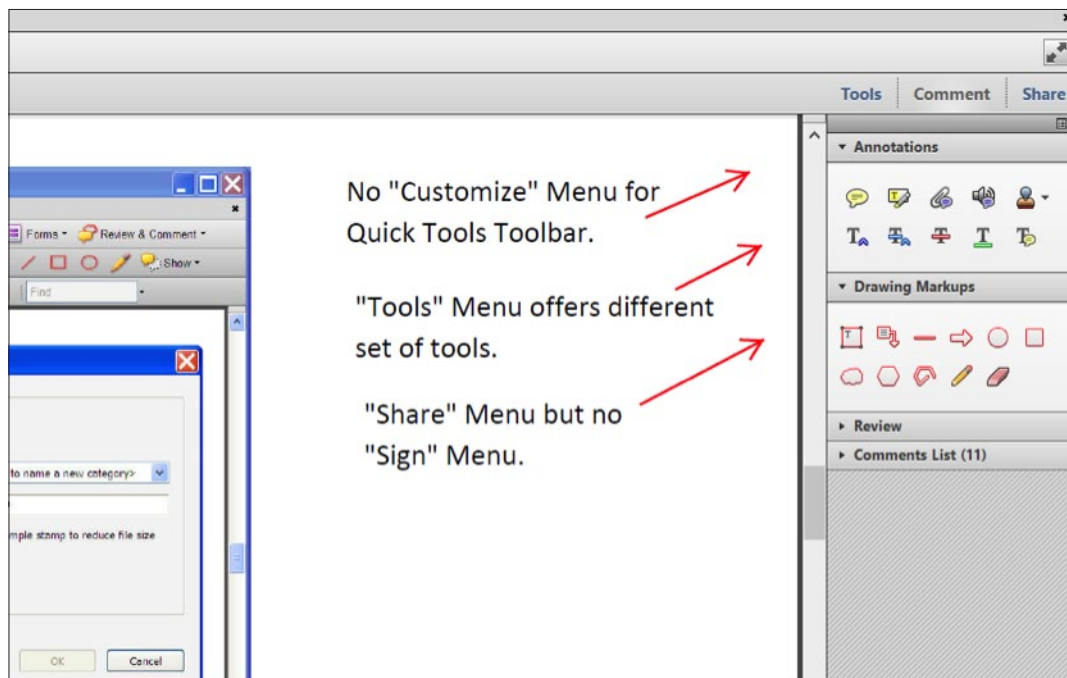
If the documents will be reviewed by several people within the firm, you may also configure Adobe Acrobat to allow others to insert their own tick marks when they have completed their assigned action or review role for each return or work paper.


The process of creating custom tick marks remains the same in both versions:

- Place the Stamp Tool in the "Quick Tools Toolbar" for easy access.
- Select "Custom Tools" from the Stamp Tool Menu.
- Follow the same processes as outlined for Version 11.

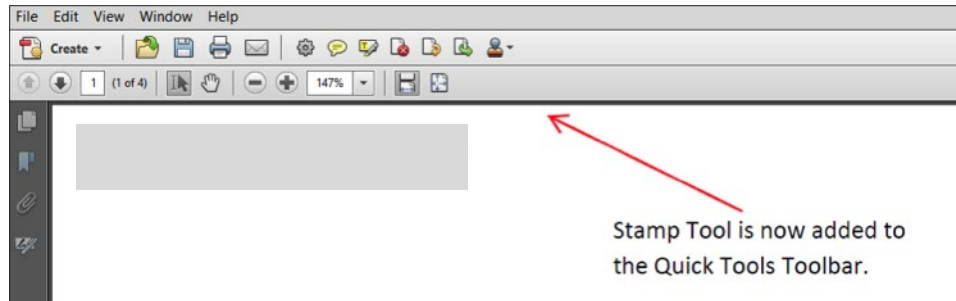
In fact, there are only two differences between the versions that are worth mentioning, and neither of these is critical:

- Some of the menus in the upper right-hand corner are different. Specifically, the "Customize" and "Tools" menus provide different options when selected, and the "Share" menu found in version 10.0 is replaced by the "Sign" menu in version 11.0. This means that some of the shortcuts for initials and signatures have not been pre-configured, and some of the other Stamp Tools are not available.



- Locate the Quick Tools Toolbar icon for "Customize." It looks like this: 
- Click on the gear to open the "Customize" menu and scroll down to "Comments," then "Annotations," and select "Stamps (Dropdown):"

- Click on the right arrow to move the Stamps icon to the right panel, and it will be placed on the Quick Tools Toolbar:



The ability to create, manage, and use tick marks in Adobe Acrobat has improved with each new version, and this feature should be expected to persist in future releases. The tax and accounting industries will still require the creation of custom stamps to handle the unique needs of these industries, such as their well-defined approval processes.

Contact info:
Email: Sales@GruntWorx.com
877.830.6059

Visit us online at: **GruntWorx**

