BILL'S HOME TECH
Home & Small Business Tech Solutions

BILL'S COMPLETE MANUALS · NO. 18

PDFs

Opening, filling in, signing and saving PDFs — explained in plain English, one step at a time

A plain-English guide to every PDF you'll meet

Take your time — you can't break it

Written for you by Bill — Bill's Home Tech

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For phones, tablets, and computers · facts current November 2026

What's Inside

This is your PDF manual. Read it in any order and at your own pace — there is no test, and you can't fall behind. Keep it nearby and reach for whatever you need. Every job comes with what it actually does *for you*, and slow step-by-step directions anyone can follow. The programs that open PDFs update their screens from time to time, so if a button sits in a slightly different spot on yours, don't worry — I'll always tell you what to look *for*, and the idea stays the same.

Part 1 — Getting Started with PDFs

1 A Note from Bill
2 What a PDF Actually Is
3 Why Forms Love PDFs: Fillable vs. Flat
4 The Programs That Open PDFs
5 Getting Comfortable: Taps, Clicks & Nothing to Fear

Part 2 — Opening & Reading a PDF

6 Opening a PDF on iPhone & iPad
7 Opening a PDF on an Android Phone or Tablet
8 Opening a PDF on a Windows Computer
9 Opening a PDF on a Mac
10 PDFs That Arrive by Email or Text
11 PDFs on a Website

Part 3 — Getting Around a PDF

12 Scrolling & Turning Pages
13 Zooming In So You Can Actually Read It
14 Finding a Word with Search
15 Jumping Around: Thumbnails, Bookmarks & Page Numbers

Part 4 — Filling In a Form

16 First, Which Kind of Form Is It?
17 Filling a Form on iPhone & iPad
18 Filling a Form on an Android Phone or Tablet
19 Filling a Form on a Windows Computer
20 Filling a Form on a Mac with Preview
21 Checkboxes, Dates, Dropdowns & Other Tricky Bits

Part 5 — Signing a PDF

22 What an Electronic Signature Really Is
23 Creating Your Signature Once, to Reuse Forever

24 Signing on iPhone & iPad
25 Signing on a Mac with Preview
26 Signing on a Windows Computer
27 "Please Sign" Emails: DocuSign and the Like
28 Is It Legal? E-Signatures in Plain English

Part 6 — Saving, Sending & Printing

29 Saving Your Finished Form (So Your Typing Sticks)
30 Renaming a PDF & Finding It Again
31 Emailing a Completed Form
32 Printing a PDF

Part 7 — Handy Jobs

33 Scanning Paper to PDF with Your Phone
34 Making a PDF from Something on Your Screen
35 Combining Several PDFs into One
36 Splitting a PDF or Pulling Out Pages

Part 8 — Staying Safe & When to Call Bill

37 Staying Safe with PDFs
38 Spotting a Fake Signing Request
39 Your PDF Cheat-Sheet
40 A Plain-English Glossary of PDF Words
41 Quick Fixes: When a PDF Won't Behave
42 When to Call Bill

PART 1

Getting Started with PDFs

What a PDF is, why forms love them, which program opens one on your device, and the handful of buttons that run the whole thing. Start here.

CHAPTER 1

A Note from Bill

Hello, and welcome. Whoever is holding this book right now — this is for **you**. Maybe the doctor's office emailed you a form and asked you to "fill it out and send it back," and you weren't sure where to even begin. Maybe your bank or your insurance company keeps sending things you're supposed to sign. Maybe you just keep seeing the word **PDF** and nobody ever stopped to tell you what it means. Wherever you're starting from, you've come to the right place, and I'm glad you're here.

I'm Bill. Helping folks feel at home with their technology is what I do every day, and I wrote this book the same way I'd sit down next to you at your kitchen table: patiently, in plain English, with no rushing and no fancy words. If I ever use a term you don't know, I'll stop and explain it right then — you won't have to look anything up.

Why learning PDFs is worth your time

Here's the honest truth: forms used to come in the mail, and you filled them in with a pen. Today, more and more of them arrive as PDFs — the doctor, the bank, the tax people, the landlord, the grandchild's school. A PDF is simply the modern version of that sheet of paper. Once you can open one, type into it, sign it, and send it back, a whole pile of everyday errands gets easier — and you can do most of them from your chair, without a trip to the post office or a wait in a waiting room.

This book is yours — read it any way you like

You do not have to read these pages in order, and there is no test at the end. Start on page one, or flip straight to the chapter that answers today's question. Fold the corners, underline things, scribble in the margins. Keep it in the drawer by your chair and pull it out whenever a form lands in your inbox. It's a reference, not a race — you cannot fall behind.

The big promise: you truly can't break it

Here is the most important thing in this whole book, so I'll say it plainly. **You cannot break a PDF, or your device, by tapping around and exploring.** Opening a PDF to look at it changes nothing. Typing into a form doesn't send it anywhere until *you* choose to send it. And nearly everything can be undone, closed without saving, or started over. Tapping and poking at the screen to see what happens is exactly how everyone learns, including me.

WHAT THIS DOES FOR YOU

Why this matters

When you stop worrying about breaking something, you start actually using it — and that's when all this becomes genuinely useful: forms filled from your armchair, papers signed in a minute, and no more putting off the envelope on the counter because you weren't sure how.

A word about safety, right up front

I'll be honest with you, because that's how I do things. PDFs are wonderfully handy, but they are also one of the favorite tools of the people who send scam emails — a fake "please sign this" message, or a nasty attachment from a stranger. I am not telling you this to frighten you. I'm telling you because a little know-how makes you nearly scam-proof, and this book has a whole part (Part 8) devoted to it. You can use PDFs *and* be safe. The two go together.

And I'm only a phone call away

This book will carry you a long way on your own. But if you ever get truly stuck, you are never stuck alone — that's not how I do things. Call me at **(330) 200-8042** and we'll work it out together, with no judgment and no eye-rolling. There is no such thing as a silly question. The only bad question is the one you talked yourself out of asking.

— Bill

CHAPTER 2

What a PDF Actually Is

Before we touch a single button, let's answer the simplest question of all: what *is* this thing called a PDF?

A photograph of a page

The easiest way to picture a PDF is as a **photograph of a printed page**. Someone took a document — a letter, a bill, a form, a brochure — and saved it in a way that looks exactly the same no matter where you open it: on your phone, your tablet, your computer, or printed out on paper. The page you see is the page everyone sees. Nothing shifts around, nothing falls off the edge. That faithfulness is the whole reason PDFs exist.

The three letters stand for **Portable Document Format**. "Portable" just means it travels well — you can email it, text it, or carry it on a little memory stick and it still looks right wherever it lands. Most of the time you can simply think of a PDF as "a document that stays put."

> GOOD TO KNOW
>
> **How to know a file is a PDF**
>
> A PDF's name usually ends in **.pdf** — like *bloodwork-form.pdf*. Its little picture (its "icon") is often white with a red corner or a red box. And when you tap it, it opens to show a page you can read. Those are the three tell-tale signs.

Why not just use a regular document?

You may have made a document before in a program like Microsoft Word. Those are grand for writing, but they can look different on someone else's computer — the words rearrange, a photo jumps to the next page. A PDF locks everything in place, like setting a page in concrete. That's why banks, doctors, and government offices send PDFs: they want you to see *exactly* what they meant to send, down to the last line.

What you can do with a PDF

Across this book, here are the everyday jobs we'll cover, one at a time:

- **Open and read it** — on any device you own (Part 2).
- **Get around it** — scroll, zoom in so you can read it, search for a word (Part 3).
- **Fill in a form** — type your answers right onto the page (Part 4).
- **Sign it** — add your signature without printing a thing (Part 5).

- **Save, rename, email, and print it** — so your finished form goes where it needs to go (Part 6).
- **Handy extras** — scan a paper form with your phone, combine two PDFs into one, pull out a page (Part 7).

TIP

You don't have to learn it all at once

Nobody needs every chapter on day one. When a form arrives, flip to the part that matches what you're trying to do that day. Over a few weeks it all becomes second nature — and this book will be waiting in the drawer the next time you need it.

CHAPTER 3

Why Forms Love PDFs: Fillable vs. Flat

Most of the PDFs that will land in your lap are **forms** — a page with blanks for your name, your date of birth, your address, and so on. There are two kinds, and telling them apart is the single most useful thing in this whole book, so let's get it straight now. Don't worry about memorizing it; I'll remind you again in Part 4.

Kind one: the fillable form (the blanks are "live")

A **fillable** PDF (you'll also hear "interactive") has real, working boxes built into it. When you tap or click on the line next to "Name," a blinking cursor appears and you can just start typing — the box was made to be typed in. Checkboxes click on and off. These are the easy ones, and they're becoming more common because they save everyone trouble.

Kind two: the flat form (it's really just a picture)

A **flat** PDF has lines and boxes drawn on it, but they aren't "live" — it's really just a picture of a blank form, the same as if someone photocopied a sheet of paper. If you tap a blank, nothing happens; no cursor appears. You can still fill it in, but you do it a little differently: you lay your own text *on top* of the page using a tool often called **Markup** or **Fill & Sign**. We'll walk through exactly that in Part 4.

> **GOOD TO KNOW**
>
> **A 10-second test to tell which kind you have**
>
> Open the form and **tap (or click) right on a blank line** where your answer would go. If a blinking cursor appears and your keyboard pops up — it's **fillable**, the easy kind. If nothing happens — it's a **flat** form, and you'll type on top of it with the Markup or Fill & Sign tool. Either way, you're covered; it's just two slightly different routes.

Why this matters more than it sounds

A great many folks give up on a form at exactly this point — they tap the blank, nothing happens, and they assume they've done something wrong or that "the computer won't let me." Nothing is wrong at all. You simply have a flat form, and you reach for the Fill & Sign tool instead. Knowing those are the only two possibilities takes the mystery out of every form you'll ever meet.

CHAPTER 4

The Programs That Open PDFs

A PDF is just a file; something has to *open* it so you can read it, the way a record needs a record player. The good news is that every phone, tablet, and computer already comes with a program that opens PDFs — you almost never have to install anything. Here's the lay of the land, so the names won't surprise you later.

Your device	What opens a PDF
iPhone & iPad	**Files** and **Books** open and read PDFs; the **Preview** app (on newer models) and the built-in **Markup** tool let you type and sign. Mail shows PDFs right in the message.
Android phones & tablets	The **Files** app and **Google Drive** open PDFs; many phones also have Google's **Drive PDF Viewer** built in.
Windows computer	**Microsoft Edge** (the blue-and-green swirl) opens PDFs by default and can type on them. Many folks also install the free **Adobe Acrobat Reader** for signing.
Mac computer	**Preview** (built in) opens, fills, and signs PDFs beautifully. Safari shows them in the web browser too.

A free helper worth knowing about: Adobe Acrobat Reader

You'll hear one name over and over when people talk about PDFs: **Adobe**. Adobe is the company that invented the PDF, and they make a free program called **Adobe Acrobat Reader** that opens, fills, and signs PDFs on every kind of device. You do *not* need it — your device's built-in programs handle most jobs — but it's a reliable fallback, and I mention it throughout the book as an "if all else fails" option. The plain **Reader** is free; only the fancier "Acrobat Pro" costs money, and you won't need that.

HEADS UP

"Free" should mean free

If you ever go looking for Adobe Acrobat **Reader**, get it from your device's official app store (or from **adobe.com** on a computer), and make sure it says **Reader** and **free**. Steer clear of look-alike "PDF" apps that demand your credit card the moment you open them, or that pester you to "subscribe" to do simple things. You rarely need to pay anything at all to work with a PDF.

Which one should you use?

Whatever already opens when you tap a PDF is almost always the right choice — it's built for your device and it's free. Throughout this book I'll give you the steps for the built-in program first, device by device, and point out where Adobe Acrobat Reader is a handy alternative. Use whatever's comfortable; there's no wrong answer.

CHAPTER 5

Getting Comfortable: Taps, Clicks & Nothing to Fear

Working with a PDF uses the very same moves as everything else on your device. If you've used your phone or computer at all, you already know these. Let's name them so nothing feels mysterious — and so I can use the same words all through the book.

On a phone or tablet (you use your finger)

- **Tap** — one light touch to choose or open something. You never need to press hard.
- **Scroll** — rest a finger on the screen and slide up to move down the page (or down to go back up). This is how you read a long PDF.
- **Pinch to zoom** — to make the writing bigger, put two fingers on the page and spread them apart; pinch them together to shrink it back. A lifesaver on small print.
- **Tap once in a blank** — on a fillable form, this is how you place your cursor to start typing.

On a computer (you use the mouse)

- **Click** — one press of the left mouse button to choose or open something.
- **Scroll** — roll the little wheel on top of the mouse, or slide two fingers on a laptop's touchpad, to move down the page.
- **Double-click** — two quick clicks in a row; this is how you usually *open* a PDF file from your desktop or a folder.

TIP

There's no wrong tap you can't walk back from

If you tap or click something and the screen changes in a way you don't recognize, don't panic and don't start pressing everything. Look for a **back arrow** (usually top-left), an **X** to close, or the word **Done** or **Cancel**, and you'll retrace your steps. Simply closing a PDF without saving undoes anything you were trying — the original is untouched.

WHAT THIS DOES FOR YOU

Confidence is the real skill

The folks who handle PDFs with ease aren't the ones who memorized the most — they're the ones who relaxed and started tapping around. Once you believe you can't break it (and you can't), the whole thing opens up. That belief is worth more than any single instruction in this book.

PART 2

Opening & Reading a PDF

How to open a PDF on your phone, tablet, or computer — and how to find it again when it comes by email, text, or from a website.

CHAPTER 6

Opening a PDF on iPhone & iPad

On an iPhone or iPad, a PDF will open the moment you tap it — you very rarely have to pick a program yourself. Let's go through the places a PDF turns up and exactly what to tap.

From an email

This is the most common one by far. When someone emails you a PDF, it rides along at the bottom of the message as an **attachment** — a little rectangle with the file's name and a page-shaped picture.

1. Open the **Mail** app and tap the message.
2. Scroll down to the attachment at the bottom.
3. **Tap it once.** The PDF opens full-screen so you can read it.
4. To come back out, tap **Done** or the **back arrow** (top-left), or the **X**.

From the Files app

Files is your iPhone and iPad's filing cabinet — it's where saved PDFs live. Its picture is a blue folder.

1. Tap the **Files** app.
2. Look under **Recents** (at the bottom) for anything you opened lately, or tap **Browse** and open a folder such as **Downloads**.
3. Tap the PDF's name to open it.

In the Books app

Apple's **Books** app (an orange book picture) is a pleasant place to *read* long PDFs — manuals, booklets, newsletters. Sometimes when you save a PDF you'll be asked whether to put it in Books; if a PDF is for reading rather than filling in, that's a fine home for it. To find it later, open Books and tap **Library**, then **PDFs**.

GOOD TO KNOW

"Preview" on newer iPhones and iPads

On the newest Apple software, there's a separate app called **Preview** that becomes the main home for PDFs — it opens, fills, and signs them. If you see it, treat it as the all-rounder. If you don't have it, don't worry: Files, Books, and the Markup tool (coming up in Part 4) do everything you need.

TIP

If you're asked "Open with…"

Now and then, tapping a PDF offers you a choice of programs. Any of them will show you the page just fine. If you're not sure, pick **Files**, **Books**, or **Preview** — all friendly, all free, all made by Apple.

CHAPTER 7

Opening a PDF on an Android Phone or Tablet

Android phones come from several makers — Samsung, Google, Motorola, and others — so a button may sit in a slightly different spot or wear a slightly different name. But a PDF opens the same way everywhere: tap it, and it appears.

From an email (Gmail)

1. Open **Gmail** and tap the message.
2. Find the attachment — a tile with the file's name near the bottom of the message.
3. **Tap it.** The PDF opens so you can read it.
4. Tap the **back arrow** or **X** to return to your email.

From the Files app

Most Android phones have a **Files** app (sometimes called **My Files** on Samsung, or **Files by Google**). It's your filing cabinet for saved items.

1. Open **Files** (or **My Files**).
2. Tap **Downloads**, or look under **Recent** for something you saved lately.
3. Tap the PDF to open it.

From Google Drive

Google Drive (a green, yellow, and blue triangle) is a free storage spot that comes with most Android phones. PDFs you save there, or that others share with you, open right inside it — just tap the file's name.

> **GOOD TO KNOW**
>
> **The viewer may be called "Drive PDF Viewer"**
>
> On many Android phones the thing that actually opens your PDF is Google's **Drive PDF Viewer**. You don't need to seek it out — it simply springs into action when you tap a PDF. If your phone ever asks which app to use, choosing it (or **Google Drive**) is always a safe pick.

TIP

Only one choice? Tap "Just once" while you're learning

If Android asks whether to use an app "Just once" or "Always," tap **Just once** for now. That way you stay in charge and can try a different program next time. Once you know which you like, you can choose **Always** to stop being asked.

CHAPTER 8

Opening a PDF on a Windows Computer

On a Windows computer, PDFs open in **Microsoft Edge** unless you've changed it — Edge is the web browser that comes built in, with a blue-and-green swirl for its picture. It's a perfectly good PDF reader, and it can even type on forms (we'll do that in Part 4).

From a folder or the desktop

1. Find the PDF — often in your **Downloads** folder, or on the desktop.
2. **Double-click** it (two quick clicks of the left mouse button).
3. It opens in Edge, filling the screen. Scroll with the mouse wheel to read on down.

From an email

If you read email in a web browser (Gmail, Outlook.com, Yahoo), a PDF attachment usually shows a small **preview** you can click to see it bigger, plus a little **download arrow** to save your own copy. Click the preview to read it; click the arrow when you want to keep it.

Opening it in a different program

If you'd rather use Adobe Acrobat Reader (say, for signing), you can tell Windows which program to use:

1. **Right-click** the PDF (press the right mouse button).
2. Choose **Open with** from the little menu.
3. Pick **Adobe Acrobat Reader** (or **Microsoft Edge**) from the list.

> **GOOD TO KNOW**
>
> **"Default" just means "the usual one"**
>
> When Windows calls a program the **default** for PDFs, it only means "the one that opens automatically." You can change it, but you don't have to. Edge as the default is a fine, safe choice for reading, and for most form-filling too.

CHAPTER 9

Opening a PDF on a Mac

On a Mac, the star of the show is a free, built-in program called **Preview**. It opens, reads, fills in, and signs PDFs — it does nearly everything in this book on its own, and it's already on your Mac. Its picture is a set of overlapping photos with a magnifying glass.

From a folder (Finder)

1. Find the PDF in **Finder** (the smiling blue face in your Dock) — often in **Downloads**.
2. **Double-click** it. It opens in Preview.
3. Scroll with the mouse wheel or two fingers on the touchpad to read down the page.

From an email (the Mail app)

In the Mac **Mail** app, a PDF attachment appears at the foot of the message. **Double-click** it to open it in Preview, or single-click to peek at it right inside the email.

Making sure it opens in Preview

If a PDF opens in your web browser or another program and you'd rather it used Preview:

1. In Finder, click the PDF **once** to highlight it (don't open it).
2. Hold the **Control** key and click it, then choose **Open With** > **Preview**.
3. To make it always use Preview, choose **Get Info** instead, find **Open with**, pick **Preview**, and click **Change All**.

> TIP
>
> **Preview is the Mac owner's best friend for PDFs**
>
> If you have a Mac, you can do almost everything in this book — reading, filling forms, signing, combining, saving — without installing one thing. Whenever a chapter offers several programs, Mac folks can simply reach for Preview.

CHAPTER 10

PDFs That Arrive by Email or Text

Most PDFs come to you in a message — an email, or sometimes a text. Knowing how to find the attachment, and how to save your own copy, means a form never gets "lost" in your inbox.

Finding the attachment

An **attachment** is a file clipped to a message, like a document tucked into an envelope. In an email it sits near the **bottom**, shown as a small tile with the file's name (for example *application.pdf*). On a phone you may need to scroll down past the message to see it. Tap or click it once to open it.

Reading now vs. saving for later

Tapping the attachment lets you **read** it right away — handy for a quick look. But if it's a form you'll fill in, it's wise to **save your own copy** first, so you can come back to it without digging through old emails. How you save depends on your device, and we'll cover saving properly in Part 6. For now, look for a **download arrow** (a little arrow pointing down, often into a tray) or a **Share** button that offers **Save to Files** (iPhone/iPad) or **Save to Drive / Download** (Android).

STAY SAFE

Only open attachments you were expecting

A PDF from your own doctor, bank, or a person you know is fine to open. But if a PDF arrives from a **stranger**, or shows up out of the blue claiming to be an "invoice," "receipt," or "delivery notice" you don't recognize, **don't open it**. A small number of PDF attachments are booby-trapped. When in doubt, leave it be and call me — a quick second opinion costs nothing. Part 8 covers this fully.

PDFs sent by text message

Now and then a PDF comes as a text. Tap it to open it, the same as a photo in a text. The same safety rule applies: open it if it's from someone you know and expected; be wary if it's from a number you don't recognize.

CHAPTER 11

PDFs on a Website

Plenty of PDFs live on websites — a menu, a park map, a government form, your bank statement. They behave a little differently from an attachment, so here's what to expect.

It often opens right in your browser

When you tap or click a link to a PDF on a website, it usually opens **inside your web browser** — the same window you were already in. You can read and scroll it there. To go back to the website, tap the **back arrow**.

Saving a copy from a website

If you want to keep the PDF — to fill it in, or just to have it — look for a **download arrow** or a **Download** button, usually along the top or bottom edge of the PDF. On a computer you can also right-click the link and choose **Save link as**. The file lands in your **Downloads** folder, ready to open any time.

TIP

Look for an official web address

When a form is supposed to come from a government office or a company, make sure you're on *their* real website before you download — the web address at the top should be the one you'd expect (for a U.S. government form, it usually ends in **.gov**). This keeps you from grabbing a look-alike form from a copycat site.

GOOD TO KNOW

"Downloaded" just means "saved onto your device"

Don't let the word **download** worry you. It simply means a copy came down from the internet onto your device, so you can open it even without being connected. It's the same idea as saving a photo. Nothing about it is risky in itself.

PART 3

Getting Around a PDF

Once a PDF is open, these are the moves that let you read it comfortably — turning pages, making the print bigger, finding a word, and jumping where you want.

CHAPTER 12

Scrolling & Turning Pages

A PDF can be one page or two hundred. Here's how to move through it without feeling lost.

On a phone or tablet

- **To read down a page**, rest a finger on the screen and **slide up** — the page scrolls up to reveal what's below, like unrolling a scroll of paper.
- **To go back up**, slide your finger **down**.
- **To the next page**, keep sliding up; most viewers flow straight from one page into the next. Some flip page-by-page when you swipe sideways — if yours does, swipe left for the next page, right to go back.

On a computer

- **Roll the mouse wheel** (the little wheel on top of the mouse) down to go down the page, up to go back.
- On a laptop, **slide two fingers** up or down on the touchpad.
- You can also press the **Page Down** and **Page Up** keys, or the arrow keys, on the keyboard.

Knowing where you are

Most viewers show a little note like **Page 3 of 12** somewhere on the screen — usually along the top or bottom. That tells you how far through you are, so a long document never feels bottomless. If you don't see it, give the screen a tap; it often appears when you touch the page and fades away while you read.

TIP

Lost your place? There's no harm done

Scrolling never changes a thing in the document — you're only moving your view, like sliding a magnifying glass across a page. Scroll as much as you like, back and forth, to find what you're after. You cannot lose or delete anything by scrolling.

CHAPTER 13

Zooming In So You Can Actually Read It

PDFs often open showing the whole page at once, which can make the print tiny. You are not stuck with that. Making the words bigger is quick, and it's the first thing I'd do with any form.

On a phone or tablet — pinch and spread

1. Put **two fingers** together on the part of the page you want to enlarge.
2. **Spread them apart** — the page grows bigger under your fingers.
3. To shrink it back, do the opposite: put two fingers apart and **pinch them together**.
4. Once zoomed in, slide a single finger around to move across the enlarged page.

A quick **double-tap** (two fast taps with one finger) often zooms in on that spot too, and double-tapping again zooms back out. Try both and use whichever feels natural.

On a computer

- Look for a **plus (+)** and **minus (–)** button, or a box showing a percentage like **100%**, along the top or bottom. Click the plus to zoom in, the minus to zoom out.
- You can also hold the **Ctrl** key (on a Mac, the **Command** ⌘ key) and press **+** to zoom in or **–** to zoom out.
- Holding **Ctrl** (or ⌘) and rolling the mouse wheel zooms in and out smoothly.

WHAT THIS DOES FOR YOU

There's no prize for squinting

Zooming in costs nothing and changes nothing about the document — it only makes the page bigger for *your* eyes. A form you can read clearly is a form you'll fill in correctly the first time. Make it as large as you like, then shrink it back when you're done.

CHAPTER 14

Finding a Word with Search

On a long PDF, you don't have to read every line to find the one bit you want. Nearly every PDF viewer can **search** for a word and jump you straight to it — a great time-saver for bills, statements, and long forms.

Finding the search box

- **Phone or tablet:** look for a **magnifying-glass** symbol on the screen while the PDF is open. Tap it, type your word, and tap the keyboard's **Search** or **Go**.
- **Computer:** the quickest way is to hold **Ctrl** (on a Mac, **Command** ⌘) and press the letter **F** — a little "find" box pops up. Type your word and press **Enter**.

Jumping between the matches

Once you've searched, the viewer highlights every place your word appears and carries you to the first one. Little **up and down arrows** (or **Next** and **Previous** buttons) next to the search box step you from one match to the next. That's how you'd hop straight to the word "total" on a statement, or "signature" on a long form.

> **GOOD TO KNOW**
>
> **Search works on "typed" PDFs, not photographs of pages**
>
> Searching finds words that are really *text* in the PDF. If a PDF is actually a scan or a photo of a page (think of a snapshot of a letter), there may be no text for the search to find, so nothing comes up. That's not a fault — it just means that particular PDF is a picture. You can still read it; you simply read with your eyes rather than the search box.

CHAPTER 15

Jumping Around: Thumbnails, Bookmarks & Page Numbers

For a long PDF — a booklet, a lease, a manual — there are faster ways to get to page 40 than scrolling past 39 others. Here are the three handiest.

Thumbnails — little pictures of every page

Most viewers can show a strip or grid of **thumbnails** — tiny pictures of each page, side by side. Tap or click the page you want and the viewer jumps straight there. Look for a button that shows four little squares, or the words **Thumbnails**, **Pages**, or **Contents**. It's like flipping through a book by glancing at the pages.

Bookmarks — the document's table of contents

Some PDFs come with **bookmarks** built in — a clickable list of chapters or sections, just like the contents page at the front of this book. If your viewer shows a **ribbon** or **bookmark** symbol, or a list down the left-hand side, tap an entry to leap to that part. Not every PDF has these; the person who made it decides whether to include them.

Going straight to a page number

If you know the page you want, look for the **page box** (the one showing "Page 3 of 12"), tap or click it, type the number you want, and press **Enter** or **Go**. You'll land right on it.

> **TIP**
>
> **You only need one of these**
>
> Don't feel you must learn all three. Pick whichever your viewer makes easy — most folks get on fine with thumbnails and the page box, and never touch bookmarks. They're simply three doors into the same room.

PART 4

Filling In a Form

The heart of the book. We tell the two kinds of form apart, then fill one in step by step on every device — the easy fillable kind, and the flat kind you type on top of.

CHAPTER 16

First, Which Kind of Form Is It?

Back in Part 1 we met the two kinds of form. Because this is where it really matters, let's do the quick test again before you fill anything in. Thirty seconds here saves a lot of head-scratching later.

The 10-second test

1. Open the form and find a blank where one of your answers should go — say, next to "Name."
2. **Tap it** (on a phone or tablet) or **click it** (on a computer).
3. Watch what happens.

When you tap a blank…	What you've got
A blinking cursor appears, and the keyboard pops up	**Fillable (interactive) form.** The easy kind — just type. Jump to the chapter for your device below.
Nothing happens at all	**Flat form** — really a picture of a page. You'll lay your text on top with a **Markup** or **Fill & Sign** tool. Same chapters show you how.

GOOD TO KNOW

Many forms are a mix — and that's fine

Some forms have a few live boxes and a few flat spots. Don't let it throw you. Type in the live ones; use the Markup / Fill & Sign tool for anywhere that won't take a cursor. The tool happily works on top of a form that's part live, part flat.

One golden rule before you start typing

Whichever kind you have, **save your own copy of the blank form first** if you can (Part 6 shows how on each device). That way, if you make a muddle, you can start fresh from the clean original instead of hunting for the email again. It's the digital version of photocopying a form before you fill it in.

CHAPTER 17

Filling a Form on iPhone & iPad

If it's a fillable form (the easy kind)

1. Open the PDF (from Mail, Files, or Preview).
2. **Tap the first blank.** A cursor appears and the keyboard slides up.
3. Type your answer. Tap **Next**, or tap the next blank, to move along.
4. For a **checkbox**, just tap it — a check or an X appears. Tap again to clear it.
5. When every blank is filled, tap **Done**. We'll save and send in Part 6.

If it's a flat form — use Markup

Markup is Apple's built-in tool for drawing and typing on top of any PDF or photo. Its button is a **pen tip inside a circle**, or sometimes it just says **Markup**.

1. Open the PDF. Look for the **Markup** button (the pen-tip circle) — in Mail tap the PDF first, then the Markup button; in Files it's along the top when the PDF is open.
2. Tap the **plus (+)** button, then choose **Text**. A little text box appears.
3. Type your answer, then **drag the box** onto the right blank line. Pinch it bigger or smaller so it fits neatly.
4. Tap the **plus** again for each new answer. To tick a box, add a small **Text** item with an "X", or use the pen to make a check mark.
5. When you're finished, tap **Done**. Your typing is now part of the page.

TIP

Line your text up with the printed line

On a flat form the trick is simply placing your text in the right spot. Zoom in first (pinch to spread), then drag each text box so its bottom sits right on the printed line. Take your time — you can nudge a box as many times as you like until it looks right. Nothing is fixed until you save.

GOOD TO KNOW

No Markup button? Preview or Acrobat Reader will do it

If you can't find a Markup button, open the PDF in the **Preview** app (newer models) and use its text and signature tools, or install the free **Adobe Acrobat Reader** and use its **Fill & Sign** option. All three do the same job — typing on top of a flat form.

CHAPTER 18

Filling a Form on an Android Phone or Tablet

Android's built-in PDF viewer can type into fillable forms, and for flat forms the free **Adobe Acrobat Reader** is the most dependable helper across all the different phone brands.

If it's a fillable form

1. Open the PDF (from Files, Gmail, or Google Drive).
2. **Tap the first blank.** If a cursor appears and the keyboard opens, you're in business.
3. Type your answer; tap the next blank to carry on.
4. Tap checkboxes to tick them.
5. When done, look for a **Save** option or the **back arrow**, which usually offers to save your changes. (More on saving in Part 6.)

If it's a flat form — use Adobe Acrobat Reader

1. Install **Adobe Acrobat Reader** (free) from the Play Store if you don't have it.
2. Open the PDF in it — in your Files app, tap the PDF and choose **Adobe Acrobat**, or open Acrobat and find the file.
3. Tap the **Fill & Sign** tool (a pen-and-page symbol, sometimes under a **+** or **Edit** button).
4. Tap where you want to type; a text box appears. Type your answer, then drag it onto the line. Use the small **A** handles to make the text bigger or smaller.
5. For a tick-box, tap the **check-mark** tool and tap the box.
6. When finished, tap **Done** or the **save** symbol.

> **TIP**
>
> **Samsung phones: look in "My Files" and "Samsung Notes"**
>
> On a Samsung phone the filing app is **My Files**, and Samsung's own note tools can sometimes mark up a PDF too. But if you want one method that works the same on every Android phone, Adobe Acrobat Reader's **Fill & Sign** is the reliable choice, and it's free.

CHAPTER 19

Filling a Form on a Windows Computer

The easy route: Microsoft Edge

The web browser that comes with Windows, **Microsoft Edge**, can type on many PDFs with no extra program at all.

1. Open the PDF in Edge (double-click the file, or right-click it and choose **Open with** > **Microsoft Edge**).
2. For a **fillable** form, click a blank and type — a cursor appears straight away.
3. For a **flat** form, look along the top toolbar for **Add text** (sometimes a "T" or "Text" button). Click it, then click where you want to type, and type your answer.
4. Drag your text to line it up; use the little **A** buttons to size it.
5. To tick a box, use the **Draw** pen to make a check, or add a small "X" with the text tool.
6. When finished, click **Save** (the disk symbol) — more on that in Part 6.

> **HEADS UP**
>
> **If "Add text" is greyed out or missing**
>
> Some forms are locked or built in a way Edge can't type on, and the **Add text** button won't light up. Don't fight it — open the same PDF in the free **Adobe Acrobat Reader** instead and use its **Fill & Sign** tool, which handles the stubborn ones.

The dependable route: Adobe Acrobat Reader

1. Install the free **Adobe Acrobat Reader** from **adobe.com** if you don't have it.
2. Open the PDF in it.
3. Click **Fill & Sign** in the panel on the right (or the toolbar).
4. Click any blank and type. For checkboxes and other marks, use the small row of symbols (check, cross, dot, line) that Fill & Sign gives you.
5. When done, click the **save** symbol.

CHAPTER 20

Filling a Form on a Mac with Preview

On a Mac, the free built-in **Preview** does it all — no extra program needed. Apple actually recommends Preview for filling out and signing PDF forms.

Fillable forms

1. **Double-click** the PDF to open it in Preview.
2. Click a blank field and type — Preview puts a cursor in any live box.
3. Press **Tab** to hop to the next field, or just click it.
4. Click checkboxes to tick them.

Flat forms — add your own text

If a line won't take a cursor, Preview lets you drop a text box anywhere on the page.

1. Open the PDF in Preview.
2. Click the **Markup** button (a pen tip inside a circle) along the top to show the markup tools.
3. Click the **Text** button (a small boxed "T"). A text box appears on the page.
4. Type your answer, then drag the box onto the right line. Grab a corner to resize it, and use the **font** controls (the "A") to match the size.
5. Repeat for each blank. For a tick-box, add a small text box with an "X," or use the pen.

> TIP
>
> **Preview quietly saves as you go**
>
> Preview usually keeps your changes automatically while you work. Even so, when you've finished it's worth choosing **File** > **Save** (or **Duplicate** first, to keep a blank spare). Part 6 covers saving and sending in full.

CHAPTER 21

Checkboxes, Dates, Dropdowns & Other Tricky Bits

A few parts of forms trip people up more than plain name-and-address blanks. Here's how to handle the usual suspects, whatever device you're on.

Checkboxes and "circle one"

On a **fillable** form, tap or click the little box and a check or X drops in; tap again to clear it. On a **flat** form, use your text tool to place a small "X," or use the pen/check-mark tool to make a tick. Where a form says "circle one," the pen tool lets you draw a loop around your choice.

Dates

Type dates the way the form shows them. If it reads **MM/DD/YYYY**, that means month, then day, then the four-digit year — so the 9th of March, 2026 is **03/09/2026**. If it just has blank boxes, write the numbers to match. When unsure, writing the month in words (*March 9, 2026*) is rarely wrong.

Dropdown menus

Some fillable forms have a **dropdown** — a box with a small arrow that, when tapped, unrolls a list of choices (a list of states, say). Tap the box, then tap your choice from the list. You don't type these; you pick from what's offered.

"Signature" and "initials" fields

If a form has a line marked **Signature**, hold off — that's its own skill, and the whole of Part 5 is devoted to doing it properly and easily. **Initials** are just the first letters of your names (for "William Davis," that's "WD"); Part 5 shows how to save those too.

> **TIP**
>
> **If a blank won't fit your answer, make the text smaller**
>
> Now and then your answer is longer than the space. Don't cram it. Most tools let you shrink the text (look for a smaller "A," or a font-size control) so it fits on the line neatly. A tidy, readable form is always better than a squashed one.

HEADS UP

Double-check before you send

Before a form goes anywhere, scroll through the whole thing once and check every blank — especially dates, account numbers, and spellings of names. A thirty-second read-through catches the little slips that would otherwise bounce the form back to you. There's no rush; the form waits for you.

PART 5

Signing a PDF

The part that confuses the most people — and needn't. What an electronic signature really is, how to make yours once and reuse it, how to sign on each device, and how to handle a "please sign" email safely.

CHAPTER 22

What an Electronic Signature Really Is

"Sign this electronically" sounds like something complicated and official. It isn't. Let's take the worry out of it before we sign a thing.

It's just your mark, added on the screen

An **electronic signature** (often shortened to **e-signature**) is simply your signature added to a document on a screen instead of with a pen on paper. You can make it three ways, and all three count:

- **Draw it** — trace your signature with your finger on a phone or tablet, or with the mouse on a computer. It looks like your handwriting.
- **Type it** — type your name and the program renders it in a handwriting-style script.
- **Photograph it** — sign a piece of paper, take a picture, and the program drops that image onto the page.

That's the whole of it. No special pen, no gadget, no fee. You're adding a picture of your signature to the page, in the spot marked for it.

GOOD TO KNOW

Drawn, typed, or photographed — they all count

Folks often ask which kind is "the real one." For everyday forms, all three are accepted. A drawn signature looks the most like your pen-and-ink one, so many people prefer it, but a typed name in a script font is perfectly valid on most forms. Use whichever is easiest for you.

Why signing on screen is such a help

The old way meant printing the form, signing it with a pen, then scanning or mailing it back — three chores, and you needed a printer. Signing on the screen skips all of that. You sign once, and the form is ready to send straight back by email. For anyone without a printer, it's a genuine liberation.

CHAPTER 23

Creating Your Signature Once, to Reuse Forever

Here's the best news in this part: on every device, you make your signature **one time**, and from then on it's saved and ready. Each future form takes two taps — "use my saved signature," then "place it here." So it's worth a careful few minutes the first time.

The idea, on any device

1. Open the signing tool (we'll name it for each device in the next chapters).
2. Choose to add a **new signature**.
3. **Draw** your signature with your finger or mouse, **type** your name, or add a **photo** of your signed paper.
4. Save it. The program keeps it for next time.

Getting a good drawn signature

- **Go slowly** — drawing with a finger feels odd at first. A steady, unhurried stroke beats a quick scribble.
- **Zoom in** if you can, so you have more room to shape the letters.
- **It doesn't need to be perfect** — even your pen signature varies. If you don't like it, there's always a **Clear** button to wipe it and try again.
- A **stylus** (a pen-shaped tool for touchscreens) makes it easier, but a finger works fine.

TIP

Make your initials at the same time

Many forms ask you to sign on the last page and **initial** each other page. When you first set up your signature, set up your **initials** too (just the first letters of your names). Then both are saved and you'll never have to make them again.

STAY SAFE

Your saved signature stays on your own device

Saving a signature on your own private phone or computer is safe — it's stored on that device for your use. Just be mindful on a **shared or public** computer: don't save your signature there, and if you ever do, remove it when you're done, so no one else can drop your signature onto a document.

CHAPTER 24

Signing on iPhone & iPad

Apple's built-in **Markup** tool keeps your signature ready to drop onto any PDF. Here's the whole dance, start to finish.

Setting up and placing your signature

1. Open the PDF and tap the **Markup** button (the pen-tip inside a circle).
2. Tap the **plus (+)** button, then tap **Signature**.
3. If this is your first time, tap **Add or Remove Signature** > **+**, then draw your signature with a finger and tap **Done**. (It's saved for next time.)
4. Tap your saved signature to drop it onto the page.
5. **Drag it** to the signature line, and pinch a corner to size it so it sits neatly.
6. Tap **Done**. You've signed. Part 6 covers sending it back.

GOOD TO KNOW

On newer iPhones, the Preview app signs too

If your iPhone or iPad has the **Preview** app, it has the same signature tool built in — look for the **signature** symbol in its toolbar. The steps are nearly identical: add a signature once, then tap to place it. Use whichever you have.

TIP

A photographed signature can look sharpest

If drawing with a finger never looks quite like your real signature, sign a clean sheet of white paper with a dark pen, and when Markup offers it, choose to add your signature from the **camera** — point it at your signed paper. Apple tidies it up into a crisp signature you can reuse.

CHAPTER 25

Signing on a Mac with Preview

Preview on the Mac has one of the nicest signature tools anywhere, and it can even borrow your iPhone's screen or your Mac's camera to capture a true-to-life signature.

Creating your signature (you choose how)

1. Open the PDF in **Preview**.
2. Click the **Markup** button (pen tip inside a circle), then the **Signature** button (a small signature symbol).
3. Click **Create Signature** and pick your method:

Method	How it works
Trackpad	Sign with your finger on the laptop's touchpad, then press a key when done.
Camera	Sign a white sheet of paper, hold it up to the Mac's camera, and Preview captures it.
iPhone or iPad	Sign with your finger on your nearby iPhone or iPad screen; it appears on the Mac.

Placing it on the form

1. Click the **Signature** button again and click your saved signature.
2. It drops onto the page; **drag** it to the signature line.
3. Grab a corner to size it to fit.
4. Choose **File** > **Save** when you're happy.

WHAT THIS DOES FOR YOU

Set up once, signed in seconds ever after

After that first setup, signing any PDF on your Mac is three clicks: Markup, Signature, click your signature. What used to mean printing, pen, and a trip to the mailbox becomes a ten-second job at the kitchen table.

CHAPTER 26

Signing on a Windows Computer

On Windows, the surest signing tool is the free **Adobe Acrobat Reader**'s **Fill & Sign**. Microsoft Edge can sometimes draw a signature too, but Acrobat Reader is the dependable all-rounder, so we'll lead with it.

With Adobe Acrobat Reader (recommended)

1. Open the PDF in **Adobe Acrobat Reader** (free from adobe.com).
2. Click **Fill & Sign** in the panel on the right.
3. Click the **Sign** button (a fountain-pen symbol), then **Add Signature**.
4. Choose **Type** (type your name in a script), **Draw** (draw with the mouse), or **Image** (use a photo of your signed paper). Click **Apply**.
5. Click on the signature line to drop your signature there; drag to position it and the little handles to size it.
6. Click the **save** symbol when done.

With Microsoft Edge

If you'd rather not install anything, open the PDF in Edge and look for the **Draw** pen in the toolbar. You can draw your signature directly on the line with the mouse. It works, though it won't save your signature to reuse the way Acrobat Reader does — so for anything you sign often, Acrobat Reader is the better friend.

HEADS UP

Once you save a signed form, the signature usually can't be moved

Adobe warns that after you add a signature and save the form, you generally can't edit or reposition it. So place it carefully, check it looks right, and only then save. If you do muddle it, go back to your *blank* saved copy (remember the golden rule from Part 4) and start that page again — no harm done.

CHAPTER 27

"Please Sign" Emails: DocuSign and the Like

Sometimes you won't sign a PDF yourself at all. Instead you'll get an **email asking you to sign** a document online — from a service such as **DocuSign**, Adobe Sign, or similar. A real estate agent, a lawyer, or an insurance company often uses these. Here's how they work and, just as important, how to tell a real one from a fake.

How a genuine signing request works

1. You get an email saying someone has sent you a document to **review and sign**.
2. You click a button (often **Review Document**), which opens the document in your web browser — nothing to install.
3. The service walks you through, showing little **Sign here** and **Initial here** tabs. You click each one and the service adds your signature for you.
4. You click **Finish**, and everyone involved gets a completed copy.

When it's genuine, it's genuinely easy — easier than signing a PDF yourself, because the service points to exactly where to sign.

Telling a real request from a scam

Here's the rub: scammers send fake "please sign" and "your document is ready" emails by the million, dressed up to look like DocuSign, because they know people trust them. The scam email wants you to click a button that leads to a fake page built to steal your email password — or to open a booby-trapped attachment. Use this checklist every time.

Ask yourself…	What a safe answer looks like
Were you expecting it?	A signing request should match something real — a house sale, a contract you know about. One out of the blue is suspicious.
Who is it really from?	A genuine DocuSign email comes from an address ending in **docusign.net**. A look-alike address is a red flag.
Is there an attachment?	DocuSign does not send the document as an attachment. A "signing request" with a PDF, ZIP, or HTML file attached is almost certainly fake — don't open it.
Generic greeting?	"Dear Customer" or "Dear User" instead of your name is a warning sign (though a scammer may know your name, so this alone proves nothing).
Rushing or threatening you?	"Sign within 24 hours or lose your account" is pressure meant to stop you thinking. Real requests don't threaten.

SCAM ALERT

The safe way to open any signing request

Don't click the button in the email. Instead, open your web browser yourself and go to the service's real site (type **docusign.com**), click **Access Documents**, and enter the **security code** from the email. A genuine DocuSign email includes such a code for exactly this reason. If there's no code, or the email pushes you to click a link or open an attachment, treat it as a scam — and when in doubt, call the person who supposedly sent it, using a number you already have, not one from the email.

FROM BILL

Unsure whether a signing email is real? Call me first

This is one of the most common things folks phone me about, and I'm always glad they did. If a "please sign" or "document ready" email gives you the slightest pause, don't click a thing — call me at (330) 200-8042 and we'll look at it together. Thirty seconds of caution beats a world of trouble.

CHAPTER 28

Is It Legal? E-Signatures in Plain English

A fair question: does signing on a screen really count the same as ink on paper? For the great majority of everyday documents in the United States, **yes** — and here's the plain version of why.

The short answer

A federal law called the **ESIGN Act** (passed in the year 2000), together with a matching state law most states follow (called **UETA**), says an electronic signature generally has the **same legal standing** as a handwritten one. A contract can't be thrown out just because it was signed electronically. So when your bank, insurer, or landlord asks you to sign a PDF or a DocuSign document, your e-signature is as good as your pen.

What makes it count

- **You meant to sign** — you took a deliberate action to add your signature.
- **You agreed to sign electronically** — usually a box you tick, or simply going ahead with the electronic process.
- **There's a record kept** — the signed document is saved so it can be shown later.

The handful of exceptions

A few important documents still generally need a traditional, handwritten signature — things like **wills**, some **court papers**, and certain **family-law** documents. The rules can also vary by state and by the kind of document. So for anything weighty — a will, a property deed, a court filing — don't rely on this book.

HEADS UP

For anything big or legal, ask the people who sent it

This chapter is a friendly overview, not legal advice. If you're ever unsure whether an electronic signature is acceptable for a particular document — especially a will, a deed, or a court form — ask the lawyer, office, or agency that sent it, or a legal professional. They deal with it every day and will tell you exactly what's needed.

GOOD TO KNOW

"Digital signature" is a fancier cousin

You may hear the term **digital signature**. It's a more secure, tamper-proof kind of e-signature with a hidden certificate that proves who signed and that nothing was changed afterward. Banks and legal services sometimes use it behind the scenes. You don't have to do anything differently — it's handled for you — but now the word won't puzzle you.

PART 6

Saving, Sending & Printing

You've filled in the form and signed it. Now make sure your work sticks, give the file a sensible name, send it back, and print a copy if you'd like one.

CHAPTER 29

Saving Your Finished Form (So Your Typing Sticks)

This is the step folks worry about most: "Did my typing save, or did it all vanish?" Let's settle it. The rule is simple — **a PDF keeps your changes only when you save it**, and it's wise to save it as a *copy* so the blank original stays blank.

On iPhone & iPad

When you tap **Done** after marking up a form, you're usually asked where to keep it — or it saves back where it came from. To be sure you have your own copy, tap the **Share** button (a square with an arrow pointing up) and choose **Save to Files**, then pick a folder such as **Downloads**. Now it's safely filed and filled in.

On Android

In Adobe Acrobat Reader or your viewer, tap **Done** or the **save** symbol. If you're offered **Save as a copy**, take it, and note the folder it goes to (often **Downloads** or your Google Drive).

On Windows

Click the **save** symbol (a little disk) or choose **File** > **Save As**. Pick a folder you'll remember — **Documents** or **Desktop** — and a clear name (next chapter), then click **Save**.

On a Mac

Preview usually saves as you go, but to keep a separate finished copy choose **File** > **Duplicate** first (that gives you a spare), fill it in, then **File** > **Save** and give it a name.

TIP

"Save As" vs. "Save" — the difference worth knowing

Save writes your changes onto the same file. **Save As** makes a *new* file with a new name, leaving the first one alone. When you want to keep the blank original and also have your filled-in version, use **Save As** and give the filled one a new name like "...-completed." Then you've got both.

HEADS UP

If a form "won't save your typing"

Once in a while someone fills in a form in a web browser, closes it, and the typing is gone. The cure is to **save or download the PDF after you type**, not just close the window. If a browser won't let you save your typing, open the PDF in Preview (Mac), Adobe Acrobat Reader (any device), or the Files/Markup route (iPhone) and fill it in there, where saving is reliable.

CHAPTER 30

Renaming a PDF & Finding It Again

PDFs often arrive with unhelpful names like **scan0001.pdf** or a jumble of numbers. Renaming them to something plain means you'll actually find them later. It's a two-minute habit that saves hours of hunting.

Giving a PDF a sensible name

A good name says *what it is* and *when* — for example **Medicare-form-Nov-2026** or **Water-bill-October**. Avoid odd symbols; letters, numbers, and dashes are safest.

Device	How to rename
iPhone / iPad	In the **Files** app, press and hold the PDF, tap **Rename**, type the new name, tap **Done**.
Android	In **Files** or **My Files**, press and hold the PDF, tap the menu (three dots), tap **Rename**.
Windows	In the folder, right-click the PDF, choose **Rename**, type the new name, press **Enter**.
Mac	In Finder, click the PDF once to highlight it, press **Return**, type the new name, press **Return** again.

Where your PDFs live

Most downloaded and saved PDFs land in a folder called **Downloads** — on every kind of device. If you can't find a PDF, look there first. On a phone, the **Files** app (iPhone) or **Files**/**My Files** (Android) has a **Downloads** section and a **Recents** list. On a computer, open the folder window and click **Downloads** down the side.

TIP

A folder for forms saves a lot of hunting

Make one folder called **Forms** (or **Paperwork**) and drag your filled-in PDFs into it. Then everything you've sent back to the doctor, the bank, and the rest sits in one tidy spot — far easier than scrolling through a hundred downloads when you need to check what you sent.

CHAPTER 31

Emailing a Completed Form

Once a form is filled in, signed, and saved, sending it back is usually a matter of **attaching** it to an email — clipping your PDF to a message like a document into an envelope. Two routes get you there.

The quick route: Share straight from the PDF

This is the easiest way on a phone or tablet. With the finished PDF open:

1. Tap the **Share** button (a square with an arrow pointing up on Apple; a connected-dots or arrow symbol on Android).
2. Choose your email app (**Mail**, **Gmail**, **Outlook**).
3. A new email opens with the PDF already attached. Fill in the **To** address, add a line like "Here is my completed form, thank you," and tap **Send**.

The other route: attach from inside your email

1. Start a **new email** as usual.
2. Look for the **paperclip** symbol (that's "attach a file") and tap or click it.
3. Find your saved PDF — usually in **Downloads** or your **Forms** folder — and choose it.
4. Wait for it to finish attaching (you'll see the file tile appear), then send.

TIP

Double-check it's the filled-in copy, not the blank one

Before you hit send, make sure you attached the version *with your answers and signature* — the one you named "...-completed," perhaps — and not the original blank. If you're not certain, open the attachment in the draft and have a look. Better a moment's check than sending an empty form.

GOOD TO KNOW

If the file is "too big" to send

Very occasionally a scanned PDF is too large to email. If you get a message about size, you can usually still send it through **Google Drive** or **iCloud** (your email may offer to do this for you), or send fewer pages at a time. If it's giving you grief, that's a fine moment to call me.

CHAPTER 32

Printing a PDF

Sometimes you want a PDF on paper — to read in your chair, to sign the old-fashioned way, or to keep in a file. If you have a printer, it's a few taps.

From a phone or tablet

1. Open the PDF.
2. Tap the **Share** button, then look for **Print** in the list.
3. Choose your printer (it needs to be on the same Wi-Fi as your device), pick how many copies, and tap **Print**.

From a computer

1. Open the PDF.
2. Hold **Ctrl** (on a Mac, **Command** ⌘) and press **P** — the print window opens. Or click the **printer** symbol in the toolbar.
3. Choose your printer, set the number of copies, and click **Print**.

Handy print choices

- **Pages** — print just the pages you need (say, "3 to 4") instead of the whole document, to save paper.
- **Copies** — how many you'd like.
- **Color or black-and-white** — black-and-white saves color ink for pages that don't need it.
- **Fit to page** — if a page prints cut off at the edges, choose **Fit** or **Shrink to fit** and try again.

GOOD TO KNOW

No printer? You have options

You don't need a printer to use anything else in this book — filling and signing on screen avoids paper entirely. But if you do need a paper copy now and then, your local library, pharmacy, or a shipping store (like a UPS Store) will print a PDF for you for a few cents a page. Email it to yourself, or carry it on a memory stick, and ask at the counter.

TIP

"Save as PDF" hides in the Print window

Here's a surprise worth knowing: in that same Print window, there's often a choice called **Save as PDF** (or "PDF" in the corner on a Mac). Picking it doesn't print anything — it makes a fresh PDF instead. That's a tidy way to turn almost anything on your screen (a web page, an email) into a PDF, as we'll see in Part 7.

PART 7

Handy Jobs

A few extra skills that come in useful: turning a paper document into a PDF with your phone, making a PDF from something on your screen, and joining or splitting PDFs.

CHAPTER 33

Scanning Paper to PDF with Your Phone

Here's a small marvel: your phone's camera can turn a sheet of paper into a tidy PDF, straightened and cropped, in a few seconds — no scanner machine needed. It's perfect for sending back a form that came in the mail, or saving an important letter.

On iPhone & iPad — the Files app

1. Open the **Files** app.
2. Tap the **three dots** (top corner), then **Scan Documents**.
3. Hold the phone over the page — it finds the edges and snaps automatically (or tap the shutter button yourself).
4. Scan more pages the same way if you have them, then tap **Save**.
5. Choose a folder; you now have a PDF of your pages.

The **Notes** app can scan too (open a note, tap the camera, choose **Scan Documents**) — handy for a quick one-off that you then share as a PDF.

On Android — the Google Drive app

1. Open the **Google Drive** app.
2. Tap the **plus (+)** button (bottom corner), then **Scan**.
3. Point the camera at the page; it captures and tidies it.
4. Add more pages with the **+** if needed, then tap **Save**.
5. It's saved to your Drive as a PDF, ready to share or download.

Many Samsung and other Android phones also have a **scan** option right in the Camera app or the Files app — look for a document or scanner symbol.

For a clean scan

- Lay the page on a **plain, dark surface** so the phone can find the edges.
- Use **good, even light** — near a window is ideal — and avoid your own shadow.
- Hold the phone **straight above** the page, not at an angle.
- Check each page looks clear before you save; re-scan any that came out blurry.

WHAT THIS DOES FOR YOU

A scanner in your pocket

Once you've got this, a form that arrives in the mail is no trouble at all: fill it in with a pen, scan it with your phone, and email it back — all from your kitchen table. No printer, no scanner, no trip to the post office. It's one of the handiest things a phone does.

CHAPTER 34

Making a PDF from Something on Your Screen

You can turn almost anything — a document you typed, a web page, an email, a photo — into a PDF. The secret, as we hinted in Part 6, hides inside the **Print** window. It sounds backwards, but "printing to PDF" makes a file instead of using paper.

On a computer: "print" to PDF

1. Open whatever you want to turn into a PDF (a Word document, a web page, an email).
2. Start to print it: hold **Ctrl** (Mac: **Command** ⌘) and press **P**.
3. Where it asks which **printer** to use, choose **Save as PDF** (Windows calls it **Microsoft Print to PDF**; on a Mac, click the **PDF** button in the corner and pick **Save as PDF**).
4. Click **Save**, pick a folder and a name. You've made a PDF.

On a phone or tablet

Open the thing you want to keep, tap **Share**, then **Print**. On an iPhone, once the print preview appears you can **pinch out** on the page preview to turn it into a PDF, then Share it. On Android, choose **Save as PDF** as the "printer." It's the same idea as on a computer.

From a Word document

If you use Microsoft Word, there's an even simpler way: choose **File** > **Save As** (or **Export**) and pick **PDF** from the list of file types. Word writes a PDF copy, leaving your editable document untouched.

> **GOOD TO KNOW**
>
> **Why make a PDF of something?**
>
> Turning a document into a PDF locks its look in place, so it can't be changed by accident and shows the same to everyone. It's the polite, professional way to send something you don't want tinkered with — a letter, a résumé, a notice for the church bulletin.

CHAPTER 35

Combining Several PDFs into One

Now and then you need to send a few PDFs as a single file — a form plus its cover letter, or two scanned pages that belong together. Joining them is called **combining** or **merging**.

On a Mac (Preview) — drag pages together

1. Open the first PDF in **Preview**.
2. Show the page thumbnails: choose **View** > **Thumbnails**.
3. Drag the **second PDF's file** from Finder into the thumbnail strip, dropping it where you want its pages to go.
4. Choose **File** > **Export as PDF** to save the combined file.

On iPhone, Android & Windows

Phones and Windows don't combine PDFs as neatly on their own, so the easy path is the free **Adobe Acrobat Reader** (it has a **Combine files** tool), or Adobe's own website, **adobe.com**, which has free online tools to merge PDFs. On a Windows computer, the built-in viewer won't merge, so reach for Acrobat Reader or the website.

HEADS UP

Be choosy about "free PDF combiner" websites

If you search the internet you'll find dozens of sites promising to combine or edit PDFs for free. Many are fine, but you'd be handing your document to a stranger's website — so never upload anything with your **Social Security number, bank details, or medical information** to one. For private papers, stick to the program on your own device (Preview, Acrobat Reader), where the file never leaves your hands. If you're unsure, call me.

CHAPTER 36

Splitting a PDF or Pulling Out Pages

The opposite job: you have a long PDF and want just a page or two — to send only the page that matters, or to drop a page you don't need.

On a Mac (Preview)

- **To remove a page:** show **Thumbnails**, click the page you don't want, and press the **Delete** key. Save with **File** > **Export as PDF**.
- **To keep just one page:** click that page's thumbnail, then drag it out to your desktop — it becomes its own one-page PDF.

A method that works on any device

Here's a clever trick using the **Print** window you already know (Part 6). Open the PDF, start to print it, and under **Pages** type only the pages you want (for example "2" or "2-3"). Then, instead of a real printer, choose **Save as PDF**. You get a new PDF containing only those pages — no special program needed.

TIP

Keep the original whole

Whenever you split or pull out pages, save the result as a *new* file (a new name) so your complete original stays complete. Then you've got both the full document and the page you pulled out, and you can't lose anything.

GOOD TO KNOW

Acrobat Reader and adobe.com can split too

If you'd rather not fiddle with the Print trick, the free **Adobe Acrobat Reader** and the tools at **adobe.com** both have an **Organize** or **Split** option that lets you pick pages and save them separately. The same caution applies: for private papers, use the program on your own device rather than uploading to a website.

PART 8

Staying Safe & When to Call Bill

The small amount of know-how that makes you nearly scam-proof with PDFs — plus a plain cheat-sheet, a glossary, quick fixes, and an honest word about when to pick up the phone.

CHAPTER 37

Staying Safe with PDFs

PDFs are mostly harmless — a PDF is just a page to read. But because so many people trust them, scammers use them too: a nasty attachment, a fake "invoice," a link that leads somewhere bad. The good news is that a few plain habits keep you safe without taking any of the usefulness away.

The three habits that matter most

1. **Only open PDFs you were expecting, from people you know.** A form from your own doctor or bank is fine. A PDF out of the blue — an "invoice," "receipt," "shipping label," or "voicemail" you don't recognize — is best left unopened.
2. **Never type a password into a page a PDF sends you to.** If you open a PDF and it shows a button saying "sign in here" or "verify your account," and clicking it asks for your email or bank password — stop. Real companies don't collect passwords that way.
3. **Don't trust a PDF just because it carries a familiar logo.** Anyone can paste a bank's or a government office's logo onto a page. The logo proves nothing.

What a dangerous PDF is really after

It almost always wants one of two things: to get you to **click a link** that leads to a fake sign-in page (to steal your password), or to get you to **open an attachment** that quietly causes trouble on your device. If a PDF, or the email carrying it, is pushing you toward either — with urgency, threats, or a too-good-to-be-true offer — that's your signal to stop.

SCAM ALERT

The tell-tale signs of a bad PDF or its email

Treat it as suspicious if: it arrived **unexpectedly** from someone you don't know; it **rushes** you ("act within 24 hours"); it has **spelling mistakes** or clumsy wording; it asks for a **password, bank details, or payment**; the attachment is an odd type like a **ZIP** or **HTML** file dressed up as a document; or the "from" address is a jumble that doesn't match the company it claims to be. Any one of these earns a pause.

STAY SAFE

When in doubt, don't — and check another way

If a PDF or its email gives you any pause at all, the safest move is simply to **not click and not open**. If it claims to be from your bank, your doctor, or a company you deal with, contact them using a number or website *you already have* — never the contact details in the suspicious message — and ask if it's really theirs. And you can always call me first. A deleted scam costs you nothing; a clicked one can cost a great deal.

CHAPTER 38

Spotting a Fake Signing Request

We met these in Part 5, but they're worth their own safety chapter because they're so common. A **fake signing request** is an email dressed up to look like it's from DocuSign or a similar service, saying "you have a document to sign" or "your document is ready" — when really it's bait.

Why they work, and what they want

They work because real signing requests look just like them, and because they borrow a trusted name. What they want is for you to click their button, which leads to a fake page that steals your email password — or to open an attachment that shouldn't be there. Once a scammer has your email password, they can cause real mischief.

Your quick check — the same five questions

Ask yourself	Safe sign	Warning sign
Were you expecting it?	Yes — matches a real deal	Out of the blue
Who's it from?	Ends in docusign.net	Odd or mismatched address
Any attachment?	No attachment	A PDF, ZIP, or HTML file attached
How does it greet you?	By your name	"Dear Customer / User"
Is it rushing you?	Calm, no threats	"Sign in 24 hrs or else"

SCAM ALERT

The one safe way to open a signing request

Don't click the button in the email. Open your browser yourself, type **docusign.com** (or the real address of whatever service it claims to be), choose **Access Documents**, and enter the **security code** from the email — a genuine request includes one. No code, or it pushes you to click or to open an attachment? Treat it as a scam. You can also forward a suspected DocuSign fake to **spam@docusign.net** to report it.

FROM BILL

This is the number-one thing worth a phone call

If a "please sign" or "document ready" email gives you a moment's doubt, don't click — call me at (330) 200-8042 and we'll look together. I'd far rather spend two minutes reassuring you than help undo a mess afterward. It's never a bother; it's exactly what I'm here for.

CHAPTER 39

Your PDF Cheat-Sheet

Tear this page out, or fold its corner. These are the everyday PDF moves, all in one place.

Opening & reading

To do this…	Do this
Open a PDF from email	Tap/click the attachment at the bottom of the message
Make the print bigger	Pinch and spread with two fingers (or click + / zoom in)
Find a word	Tap the magnifying glass, or press Ctrl+F (Mac: ■+F)
Save your own copy	Share → Save to Files, or the download arrow

Filling & signing

To do this…	Do this
See if a form is fillable	Tap a blank — cursor appears = fillable; nothing = flat
Type on a flat form (phone)	Markup → + → Text (iPhone); Fill & Sign (Android)
Type on a flat form (computer)	Edge "Add text," or Acrobat "Fill & Sign," or Mac Preview text tool
Sign a PDF	Markup/Fill & Sign → Signature → draw once → place on the line
Make your signature	Draw with a finger/mouse, type it, or photograph a signed paper

Finishing up

To do this…	Do this
Keep your typing	Save (or Save As a new "-completed" copy) before closing
Email it back	Open it → Share → Mail/Gmail → add the address → Send
Print it	Share → Print (phone), or Ctrl/■+P (computer)
Scan paper to PDF	Files → Scan Documents (iPhone); Drive → + → Scan (Android)

Staying safe

Situation	What to do
PDF from a stranger / unexpected	Don't open it — delete, or ask Bill
A PDF asks for a password	Stop — don't type it. Companies don't ask this way

Situation	What to do
"You have a document to sign"	Don't click — go to the real site yourself with the code
"Free PDF combiner" for private papers	Don't upload bank/medical info — use your own device

CHAPTER 40

A Plain-English Glossary of PDF Words

PDFs come with a little vocabulary of their own, and the words can make simple things sound harder than they are. Here's a plain-English dictionary of the terms you'll meet. Keep it handy for the first few weeks; soon you won't need it.

Word	What it means
PDF	Portable Document Format — a file that shows a page the same way everywhere. Think "a document that stays put."
Attachment	A file clipped to an email or text, like a document tucked in an envelope.
Download	To save a copy onto your device from the internet or an email.
Fillable form	A PDF with live boxes you can click into and type — the easy kind.
Flat form	A PDF that's really a picture of a page; you type on top of it with a tool.
Markup	Apple's built-in tool for typing, drawing, and signing on a PDF or photo.
Fill & Sign	Adobe Acrobat Reader's tool for typing on and signing a PDF.
Preview	The free program on a Mac (and newer iPhones) that opens, fills, and signs PDFs.
Adobe Acrobat Reader	A free program from Adobe that opens, fills, and signs PDFs on any device.
Electronic signature (e-signature)	Your signature added on a screen — drawn, typed, or photographed.
Digital signature	A more secure, tamper-proof e-signature with a hidden certificate.
DocuSign	A popular service for signing documents online through your web browser.
Scan	To use a camera to turn a paper page into a digital file such as a PDF.
Merge / Combine	To join several PDFs into one file.
Split	To separate a PDF, or pull out certain pages.
Zoom	To make the page bigger or smaller on screen for easier reading.
Save As	To save a new copy with a new name, leaving the original untouched.
Default program	The program that opens a file automatically unless you choose another.

CHAPTER 41

Quick Fixes: When a PDF Won't Behave

Now and then a PDF acts up — it won't open, your typing won't save, the print comes out cut off. Before you worry, try these simple fixes, which sort out the great majority of everyday hiccups.

Common troubles and their cures

If this happens…	Try this
The PDF won't open at all	Try opening it in a different program — Files or Books (iPhone), Drive (Android), Edge or Acrobat Reader (Windows), Preview (Mac). If it still won't open, the file may be damaged — ask whoever sent it to send it again.
I tap a blank but can't type	It's a flat form. Use the Markup / Fill & Sign tool to type on top (Part 4), rather than tapping the blank directly.
My typing disappeared	You closed it without saving. Fill it in again and this time Save (or download) before closing — see Part 6.
The print is cut off at the edges	In the Print window, choose "Fit to page" or "Shrink to fit" and print again.
The file is too big to email	Send it through Google Drive or iCloud (your email may offer this), or send fewer pages at a time.
Search finds nothing	The PDF may be a scanned picture with no real text to search. You can still read it with your eyes.

The three all-purpose fixes

1. **Close the PDF and open it again.** This clears most little glitches.
2. **Restart the device.** Turn it off and on. It's the oldest fix in the book because it so often works — and it never deletes a thing.
3. **Try a different program.** If one viewer is being stubborn, another (Preview, Acrobat Reader, Edge) often opens the same PDF without complaint.

> FROM BILL
>
> **When the quick fixes don't do it, that's what I'm for**
>
> If you've tried these and something's still not right, don't spend your whole afternoon wrestling with it. That's exactly the moment to call me at (330) 200-8042. A fresh pair of eyes often sorts it out in minutes, and you get your afternoon back.

CHAPTER 42

When to Call Bill

I built this book so you could do most things with PDFs yourself, at your own pace, with confidence. And you can. But part of doing things well is knowing when a task is worth handing to someone who does it every day — so you can get your paperwork done and get back to your life. Here's my honest take on when to pick up the phone.

Good reasons to call

- You got a **"please sign"** or **"your document is ready"** email and you'd like a **second opinion** before you touch it — always a good call, never a bother.
- You have an **important form** — Medicare, legal, tax, the sale of a home — and you want to get it **right the first time**, together.
- A PDF **won't open, won't save, or won't print**, and you've tried the quick fixes once or twice.
- You'd like to **sit down and learn** — filling forms, signing, scanning paper with your phone — with a patient person beside you.
- You're simply **not sure whether something is safe**, and you'd rather ask than risk it.

What working with me is like

I'm Bill, and I run **Bill's Home Tech** right here in Portage County, Ohio. I've spent **30+ years** helping people feel at home with their technology, and I treat every call the way I'd want my own parents treated: patiently, in plain English, with no rushing, no jargon, and never, ever any eye-rolling. There is no such thing as a silly question with me.

How to reach me	
Call or text	(330) 200-8042
Book online	billshometech.com/book
Where I serve	Portage County, Ohio and nearby
What it costs	Fair, honest, and told to you up front — no surprises

FROM BILL

You're never a bother — that's the whole job

Some folks hesitate to call because they don't want to be a nuisance. Please don't feel that way. Helping you is not an interruption to my work — it *is* my work, and it's work I love. Whether it's a five-minute question or sitting down to tackle a stack of forms, I'm glad to help. That's what I'm here for.

GOOD TO KNOW

If you reach my website, you may meet Sophie

When you visit billshometech.com, you might be greeted by **Sophie**, my friendly assistant on the site. She can answer quick questions and help you book a time with me. She's there to make reaching me easier — but a real person (me) always does the actual help.

Thank you for letting me be your guide through PDFs. Take your time, get your forms done without the worry, stay safe, and remember — you really can't break it, and you're never stuck alone. I'm proud of you for learning something new.

— Bill