E-Signature

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Overview

For users of the Essentials plan or above, you can enable E-Signature collection on your Forms to help provide authentication of your respondents and associate respondents to a particular response.

FormAssembly's E-Signature feature has been designed to be compliant with US E-Signature Regulations, including The Uniform Electronic Transactions Act (UETA). It is also compliant with the [Australian Electronic Transactions Act](#).

The E-Signature feature accomplishes two primary functions:

1. Provides an audit trail that includes authentication of the respondent and shows that they are who they say they are.

2. Complies with the E-Sign Act that states that electronic signatures, if used according to the law, are legally binding and valid to the same extent as signatures attached to paper documents.
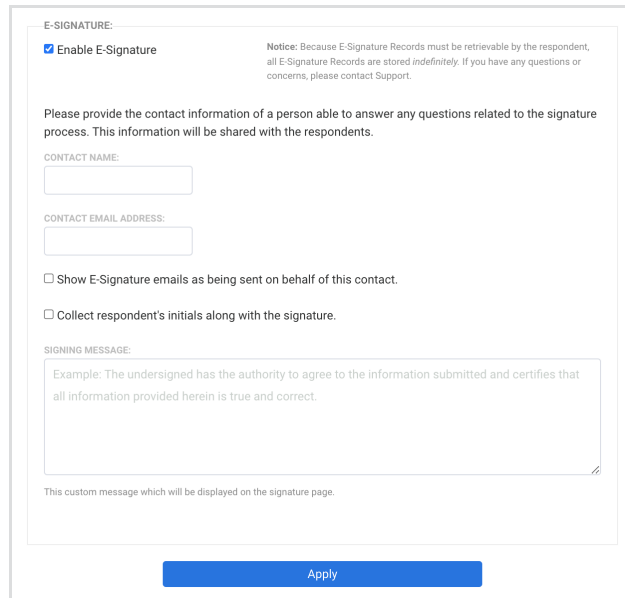
On forms where you have enabled E-Signature collection, your users will be asked to verify their submission with an E-Signature after they submit the form.

To get started with our E-Signature feature, you can follow the steps below.

> **Note:** If you are looking to set up an E-Signature on a PDF, refer to this document with information on sending PDFs to Salesforce through a Workflow.

Enabling

To enable E-Signature Collection on your form, click on the **Processing** page and then check the box at the bottom to enable the E-Signature. From there, you'll be able to enable your E-Signature Processing.

Once you have enabled E-Signature processing, the **E-Signature Settings** will appear on the processing page.

Settings

Form Contact Information

After E-Signature Collection has been enabled, you will need to configure several settings before you can begin processing, all of which can be done through the E-Signature tab. To begin, you'll need to configure your Form Contact Information so that those completing your form will have a specific person to contact should they have questions about the E-Signature.

You will need to enter a Contact Name and a Contact Email Address where the person responsible for this form can be reached. You will be unable to apply any changes made on this tab until these two fields are filled in. This information will be provided to the form respondent within the verification email.

E-SIGNATURE:

☑ Enable E-Signature

Notice: Because E-Signature Records must be retrievable by the respondent, all E-Signature Records are stored *indefinitely*. If you have any questions or concerns, please contact Support.

Please provide the contact information of a person able to answer any questions related to the signature process. This information will be shared with the respondents.

CONTACT NAME:

CONTACT EMAIL ADDRESS:

Signature Configuration

In the Signature Configuration section, you have the option to collect signatures with initials and to customize a signing message. The signing message will be displayed above the signature request when the user is completing their E-Signature.

☐ Collect respondent's initials along with the signature.

SIGNING MESSAGE:

Example: The undersigned has the authority to agree to the information submitted and certifies that all information provided herein is true and correct.

This custom message which will be displayed on the signature page.

Note: It is not currently possible to format the E-Signature signing message with HTML code or line breaks.

Form Submission Process

On forms where you have enabled E-Signature processing, once the respondent clicks the submit button, they will be taken to the E-Signature request screen. Here, they will be required to electronically sign their name, enter a valid email address, and submit their initials (if you have selected the initials option in the configuration).

The respondent can either use their mouse or finger on a touch-enabled device to sign the form, or they can check the box that says "type your name to sign" to use their keyboard and type their signature. Once they have completed all the required information, they will need to click on Submit Signed Response.

As noted in the E-Signature collection box, the respondent's signature will not be accepted until they have clicked the link in the verification email that is sent immediately after they submit their response.

Note: The typed name and email address must always be completed, even if the signature line is used. The red notation is not an error, but just a warning which always shows.

Email Verification

Once the respondent has signed and submitted their E-Signature, they will receive an email with a verification link to help ensure the authenticity of their signature. They will need to click on the link (or copy and paste the link into their browser's URL) to finish the verification process.

After the respondent has completed this verification, they will receive a final email confirmation, as will the email address listed in the "contact email address" field of the E-Signature setup and anyone else who is designated to receive form notifications. This email will contain a link that allows the respondent and form creator to view a record of the E-Signature.

Additionally, those email addresses that are listed to receive form notifications will also receive the final email confirmation.

Note: Email Verification Emails are not customizable and if a respondent tells you they did not receive an email with a verification link, you should ask them to check their spam folder to ensure that it was not caught by a spam filter. Additionally, you can resend the verification email from the "options" tab on the response page.

Accessing E-Signature Records

Once your respondent completes the email verification of their E-Signature, you will receive an email that says the Form has been sealed and is ready for viewing. In the email, you will see a link to access the E-Signature record. Another way to access the E-Signature record is to view it from an individual Response.

Sealed Email - Link to E-Signature Record:

Greetings,

This is a notification email. A form named "E-Signature Form" has an endorsed response available for your records. The signatory on record is

Name: Katrina Garza
Email Adress: katrina@veerwest.com
IP Address: 181.64.82.235
To retrieve a record of this endorsed response, visit:

https://app.formassembly.com/esignatures/record/k28FBe3Ewbi7MfrxeeQTud0

Please note, you must login to your account to view this record.

If you have any questions about this transaction, please contact the signatory-respondent.

Individual Response

You'll see an image of the E-Signature directly under the response data. You can also see a link to the E-Signature Record in an individual Response if you scroll down to the Log Entries section of the Response.

Signature

AS
Name

2019-03-29 18:19:01 (UTC)
Date

Note: A response cannot be edited or reopened after it's been "verified" and "sealed."

E-Signature Record

From the record page, you will be able to see a summary of the completed processing, a copy of the Signed Response, and several options as well. For the signatory, this page will look nearly identical. Only the Options tab will not be visible.

Summary

From the Summary section of the E-Signature Record page, you will be able to see what specific steps of processing have been completed as well as the record details and events that occurred during the processing.

You will also find the UUID (Universally Unique Identifier) which is a unique ID that is assigned to each E-Signature submission. Finally, you can find the record checksum, the package signature hash, and the custodian signature hash on this page as well.

Signed Response

From the Signed Response section of the E-Signature Record page, you will be able to view a copy of the E-Signature, which includes the signatory's IP address and the UUID for the submission. You can also view a **Printer-Friendly Version** of this response if you wish.

Options

From the Options section, which is only available to the Form Creator and not the signatory, you can choose to resend the record retrieval email to the signatories on record.

You can also choose to **send the record to a third party** if you would like them to have temporary access to the E-Signature Record for a 24-hour period.

If the signatory entered an incorrect email when signing, you can also choose to **reset the signatory email** from the options page, provided they have not clicked the verification link. This

will resend the verification email to the new address.

Reset Signatory Email
If the Signatory submitted incorrect information, you can modify the Signatory email on file. The record will reflect that this change was initiated by the form creator and **not** by the Signatory.

New Signatory Email:

	Reset Signatory Email

E-Signature Field Aliases

You can use E-Signature field aliases to send record links, images, and other E-Signature data through connectors, email notifications, and wherever aliases can be used. This can be particularly useful if you would like to attach or link aspects of the E-Signature record to an object in Salesforce.

The following aliases are available to use and should be wrapped in %% as with other FormAssembly aliases:

E-Signature Field Aliases	Field Alias Value
ESIG_ID	The record's UUID
ESIG_RECORD_URL	URL for the form creator to access the record
ESIG_PRINT_URL	URL for the form creator to access the printable record
ESIG_UNPROTECTED_RECORD_URL	URL that contains an access key to view the record
ESIG_UNPROTECTED_PRINT_URL	URL that contains an access key to view the printable record
ESIG_SIGNATURE_IMG	Base64 representation of the signature image. This will need to be sent to a file or attachment in Salesforce. This alias should be mapped to the "body" field in the connector.
ESIG_SIGNATURE_IMG_TYPE	The content type of the image, e.g., `image/png`
ESIG_INITIALS_IMG	Base64 representation of the initials image. This will need to be sent to a file or attachment in Salesforce. This alias should be mapped to the "body" field in the connector.
ESIG_INITIALS_IMG_TYPE	The content type of the initials image, e.g., `image/png`
ESIG_INITIALS_TEXT	The text of the initials

E-Signature Field Aliases	Field Alias Value
ESIG_INITIALS_IMG_NAME	A filename for the e-signature initials image, i.e., `[RECORD ID]-initials.png`
ESIG_SIGNATURE_IMG_NAME	A filename for the e-signature signature image, i.e., `[RECORD ID]-signature.png`

For example, if you wanted to send the unprotected record URL over to Salesforce, you would need to set up your connector as shown in the image below. Make sure to select that the Salesforce field will get its value from "a formula or text" and to wrap the alias in double percent signs (%%).

Force Close a Record

If a signatory does not verify their signature through the verification email, you have the option to force close their record from the Summary section.

If you force close a record, that record will be closed and no future edits or changes can be made. Additionally, since all verification steps were not completed, the record will not be sealed. This is useful for users who only want the signature and are not concerned with an audit or an officially sealed E-Signature Record.

Force Close E-Signature Record

Force the E-Signature Record to close before all steps are completed. By force closing, this will cause the E-Signature to remain incomplete, which means it will **not** be cryptographically sealed. Once the E-Signature Record is closed, you cannot undo this action and it will remain in this state forever.

The E-Signature Record will be unable to provide data for authenticating the Signatory, the Signatory may be unable to retrieve the E-Signature Record, and the E-Signature Record will have a non-comprehensive audit trail. This will directly affect the usefulness of the electronic signature.

You are **solely** responsible for all legal requirements when using this record as an electronic signature.

I UNDERSTAND THE RISK:

☑

Force Close E-Signature Record

E-Signature Records and Data Purging

If you are using the E-Signature feature in conjunction with FormAssembly's data purging, there are several additional notes to consider.

If you set your purge settings to delete entire response records, the response will be purged but there will be a separate copy of the signed data that will not be purged. This is because, by law, E-Signature records must be retained indefinitely.

Your Form Respondent will still have access to the signed data in the initial email they received.

If you have not purged the entire response, you will still have access to the signed data in the response view. If you have purged the entire response, you will need to contact the support team to retrieve that data as it is stored on our servers for security purposes.