Workflow Step - E-Signature

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Overview

Leverage FormAssembly's Document and E-Signature steps to facilitate seamless document approvals, contract signing, and other essential workflows directly within the platform.

FormAssembly's E-Signature step is designed to comply with U.S. E-Signature Regulations, including the Uniform Electronic Transactions Act (UETA). It is compliant with the E-Sign Act, which states that electronic signatures, when used in accordance with the law, are legally binding and valid to the same extent as signatures attached to paper documents.

This article covers the basics of selecting a generated PDF document from the Document step, or a Response PDF of a Form Step, to be digitally signed in an E-Signature step.

Requirements

To use the E-Signature step, a FormAssembly user must

- be part of a Team plan or higher
- have Content Management user permissions enabled for their login
    - specifically, the Enable E-Signature permission must be enabled for the user account
- **Optional**: have a Document step before the E-Signature step in a workflow
    - the template configured in the Document step must include at least one signature tag

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Document Template Signature Tags

The E-Signature step can utilize a document with signature tags from a Document step. The Document step article covers how to add tags to a template. To add an E-Signature to a generated document, at least one signature tag must be included in the template submitted to the Document step. Included signature tags will not be mapped during the Document step, but will be reserved for mapping in the E-Signature step.

The following signature and signer tags can be included on a template in a Document step:

- `{{signature}}`
- `{{signer_title}}`
- `{{signer_name}}`
- `{{signer_date}}`
- `{{signer_initials}}`

Note:

- The `{{signature}}` tag is the only one that results in the ability to draw/type a signature. The other `{{signer}}` tags are informational text fields.
- A `{{signer}}` tag will not be accepted without a corresponding `{{signature}}` tag.
- Signature and signer tags are **not supported within loop tags**. If a signature tag is included within a loop, the signature tag will be skipped.

Formatting Recommendations for Signature Tags

- Avoid placing text to the right of signature/signer tags.
  - The signature/signer tag's content can overlap with text to its right, making the document hard to read.
- Set line spacing to at least 2.0 on lines containing signature tags.
  - The signature may overlap with the text above or below, without sufficient space around the tag.

Adding Multiple Signers

With the proper tag formatting, multiple signers can be assigned to a single document. Tags will be grouped by matching tag suffixes to be assigned to a signer.

For example, if you wanted a manager and a director to sign and date a document in an E-Signature step, you might have the following tags in your document template:

- `{{signature_manager}}`
- `{{signer_name_manager}}`
- `{{signer_date_manager}}`
- `{{signature_director}}`
- `{{signer_name_director}}`
- `{{signer_date_director}}`

Note: Only exact matching suffixes AFTER the supported tags will be grouped. If a tag does not follow this format, it will not be recognized in the E-Signature step and will not be shown to a signer.

Add an E-Signature Step to a Workflow

- Select **Add Step**
- Select **E-Signature**

Note: We recommend adding a redirect step immediately BEFORE an E-Signature step so respondents are presented with messaging of your choice, such as a Thank You page, rather than a screen with a "Signature Process Started" message.

E-Signature Properties

Document Tab

Select one or more documents to be signed from the Workflow Document multi-select list.

- **Generated PDF** - A PDF generated by a Document step in the workflow can be selected for signature on the E-Signature step. Ensure the document you choose has at least one signature tag to map.
- **Response PDF** - A Response PDF of a Form step in the workflow can be selected for signature on the E-Signature step.

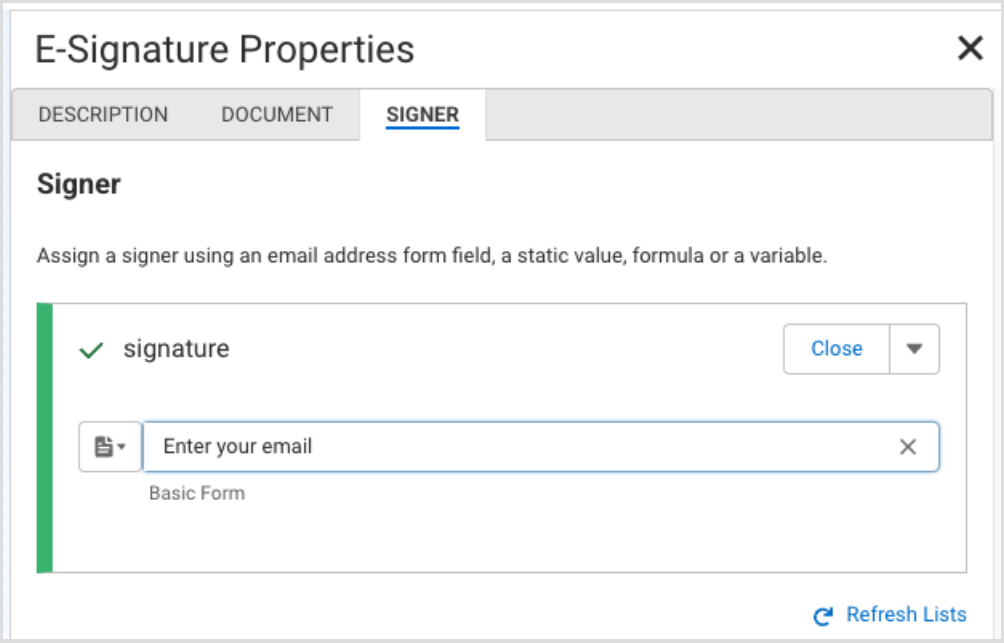
Note:
- The Form Response PDF does not require the use of signature tags and will only support a single signer.
- More than one Response PDF cannot be selected at this time
- Additional Generated PDFs cannot be selected if a Response PDF is selected.

If more than one document is selected, they will be merged into a single document as a packet to be signed. For optimal performance, packets should not exceed 70MB.

Signer Tab

Each signature tag on a document template can be assigned to a single signer. If a Response PDF was selected on the Document Tab, a single signer can be assigned to sign the bottom of the Response PDF. Use this tab to designate who that signer is using an email address gathered by a form field, value or formula, or variable.

Note: If more than one document was selected in the Document tab, any matching signature tags will be grouped into the same signer assignment and signed by the same person. For example, Documents 1 and 2 both contain {{signature_ceo}}; the assigned signer will sign in both places in the merged document packet.



Assign a Signer

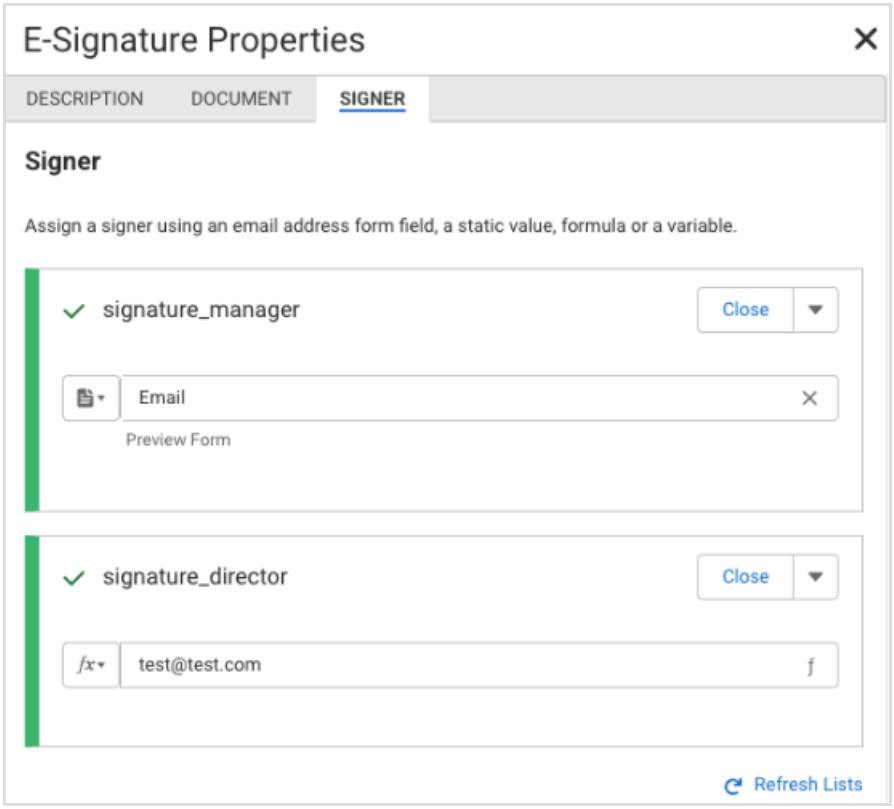
- Select a form **field**, enter a **value or formula**, or select a **variable**
  - **Field**: Use the list to search for and select a form field with email validation from the forms included in the workflow
  - **Value or Formula**: Enter a value as text or open the formula editor to build a formula.

- **Variable**: Select an existing workflow variable from the dropdown

Assign Multiple Signers

All signature & signer tags uploaded on a document template with a unique suffix will be assigned to a signer. Select a form field with email validation, a static value or formula, or a workflow variable to be assigned to each signer.

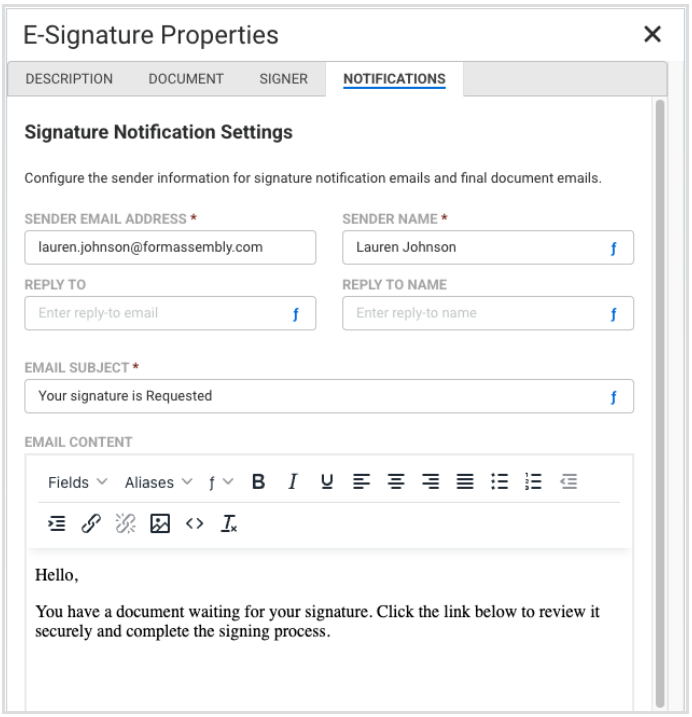
> **Note**: All signer email addresses must be unique.



> **Note**: Signers appear in the order in which they are placed in the document template. This is also the order in which they will receive their email notification to sign the document. Resequencing the signing order must be done with the tags in the template.

Notifications Tab

Emails are sent to the configured signer(s) in the Signers tab for both notifications to provide an E-Signature and to inform them when the final document is ready for download. Use the Notifications tab to set the sender name and email address, optional reply to information, an email subject, and email content. By default, the values for the sender are the workflow owner's first name, last name, and email address, as defined in their FormAssembly account settings.



Enter the signature notification email settings.

- **Sender Name** - This is the name from which the recipient will receive the email. Use the function icon to configure an alias or formula value, if desired. For more information about how to use the Formula Editor to create formulas and leverage field aliases, see our article on Smart Processing with Formulas .
- **Sender Email Address** - This is the email address from which the recipient will receive the email. You **cannot** enter multiple email addresses in this field.
- **Reply To** - Any replies to the notification email will be sent to the address configured here. Set this field either manually or with the Formula Editor. With the Formula Editor, email fields set within a form can be used as reply-to email addresses.
- **Reply To Name**
- **Email Subject**
- **Email Content** - This text area allows you to customize the body of your email. You can style the text, add links and images, reference field aliases from any form above this step in the Workflow Builder Map, and reference workflow-specific aliases.

Note:

- As an added security measure, when configuring a Sender Email, the email address entered requires verification before the Sender Email is updated. Emails will be sent from "no-reply@formassembly.com" until the new email address is verified. Emails are verified per FormAssembly instance.
- If an email has not been verified:
  - a pending verification message appears under the changed field
  - the email address entered receives an email with a link to complete the verification
  - the verification link expires after 24 hours

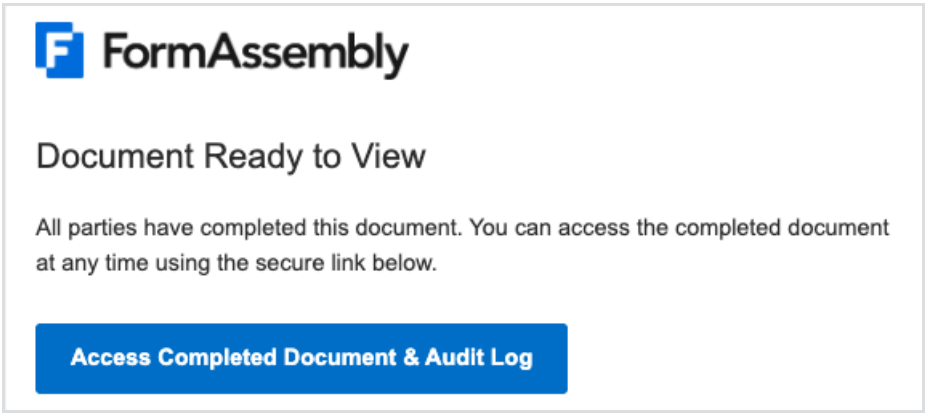
E-Signature Step Behavior

Upon workflow execution, an email notification is sent to the designated email address of the signer with a link to sign the document.

The signer should be able to apply a digital signature, either by drawing or typing.

After each signer completes the document, an email will be sent to any subsequent signers in the order they appear in the document. The next signer will not receive an email notification until the previous signer completes their signature.

Once all parties have completed their signatures, all signers will receive an email with a secure link to the E-Signature Details page, where they can download the final document and view the audit log. This link expires after 48 hours.

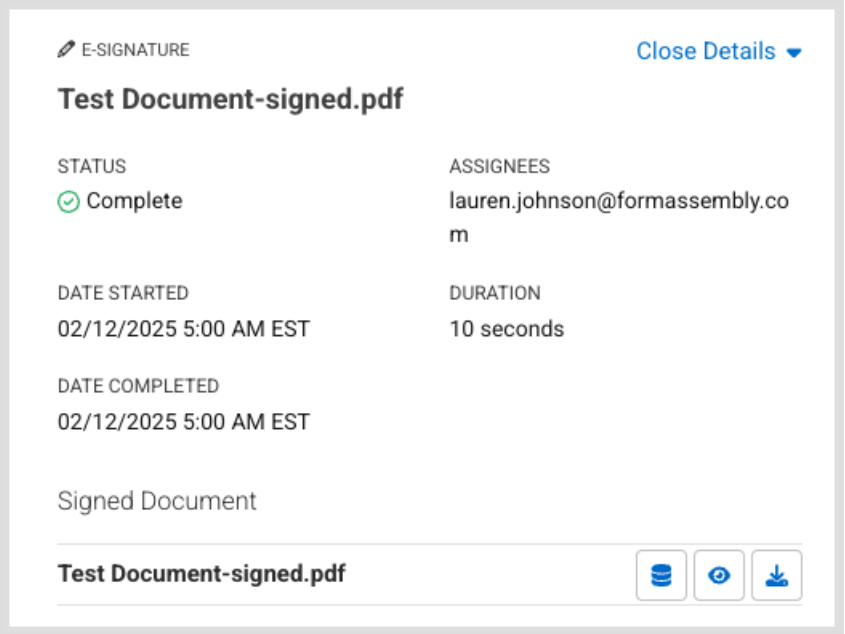


Signer Declined to Sign

Each signer has the option to decline an e-signature. If a signer selects **Decline**, a confirmation modal appears on the screen where they can leave an optional reason for decline and select **Confirm**. All signature fields assigned to the declined signer are cleared, and the completed document emailed to all signers (including those who declined) will display "**Declined to sign**" in red text on the respective signature lines. Please note that no notification is sent to the workflow owner that a signer declined; the workflow progresses normally.

Workflow Response

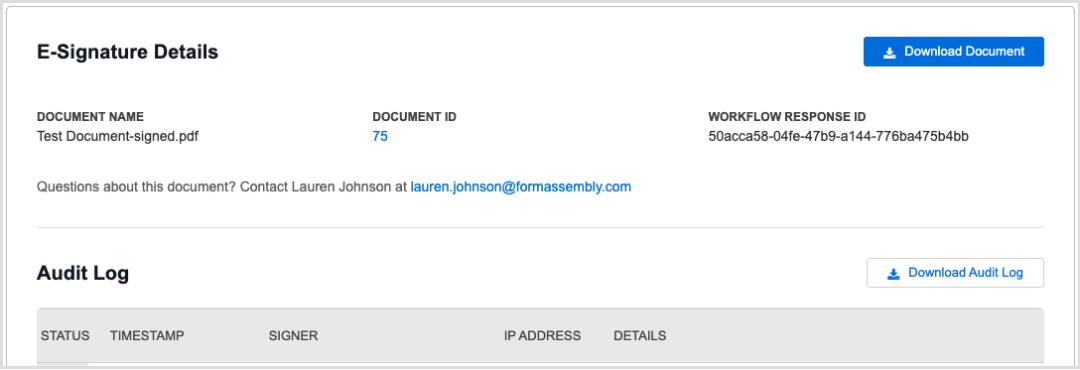
When the E-Signature step of a workflow runs, an E-Signature Card is created in the workflow response. The workflow owner and collaborators can **view** or **download** the signed document PDF or view the E-Signature record from this card. They can also view the **audit trail** of the E-Signature process.



E-Signature Details Page and Audit Log



Select the **Audit Trail** button to view the E-Signature Details page. This is the same page that signers see when clicking the link to access the completed document and audit log.



The audit log displays a table showing the event **status**, **timestamp**, **signer** (by email address), **IP address**, and **details** of each logged event.

Send a PDF File

The signed PDF document generated by an E-Signature step can be sent through connectors and the Email step.

The signed PDF document name can be chosen in the "**Send file**" dropdown of a file upload connector, such as the Salesforce, Google Drive, Microsoft SharePoint, Box, or Dropbox Connectors.