

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 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

Document Template Signature Tags

The E-Signature step requires 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 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.

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

Note: E-Signature step is in Beta

- 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 “Signature Process Started” message.

E-Signature Properties

Document Tab

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

Signer Tab

All signature tags uploaded on a document template will be assigned to a single signer. Use this tab to designate who that signer is using an email address gathered by a form field, value or formula, or variable.

The screenshot shows the 'E-Signature Properties' dialog box with the 'SIGNER' tab selected. The 'Signer' section has a title and a description: 'Assign a signer using an email address form field, a static value, formula or a variable.' Below this is a list of signers. The first signer is 'signature', marked with a green checkmark. To its right are 'Close' and a dropdown arrow. Below the list is a text input field with a document icon on the left, the placeholder text 'Enter your email', and a close 'X' button on the right. Below the input field is the label 'Basic Form'. At the bottom right of the dialog is a 'Refresh Lists' button with a circular arrow icon.

| DESCRIPTION | DOCUMENT | SIGNER |
|--|------------------|---------|
| Signer Assign a signer using an email address form field, a static value, formula or a variable. | | |
| ✓ | signature | Close ▼ |
| 📄 | Enter your email | X |
| Basic Form | | |

Refresh Lists

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.

E-Signature Properties

DESCRIPTIONDOCUMENTSIGNER

Signer

Assign a signer using an email address form field, a static value, formula or a variable.

signature_manager

Close

Email

Preview Form

signature_director

Close

test@test.com

f

Refresh Lists

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 when the final document is ready for download. Use the Notifications tab to set the Sender Name and Sender Email Address for these notification emails. By default, these values are the workflow owner's first name, last name, and email address, as defined in their FormAssembly account settings.

E-Signature Properties

DESCRIPTIONDOCUMENTSIGNERNOTIFICATIONS

Signature Notification Settings

Configure the sender information for signature notification emails and final document emails.

SENDER NAME *

Test User

f

SENDER EMAIL ADDRESS *

test@gmail.com

Sender email will be no-reply@formassembly.com until this email address is verified.

Enter the **Sender Name**(e.g., your name and email) and **Sender Email Address**.

- **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.

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.



Document Ready to View

All parties have completed this document. You can access the completed document at any time using the secure link below.

[Access Completed Document & Audit Log](#)

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

Close Details ▾

Test Document-signed.pdf

STATUS

Complete

ASSIGNEES

lauren.johnson@formassembly.com

DATE STARTED

02/12/2025 5:00 AM EST

DURATION

10 seconds

DATE COMPLETED

02/12/2025 5:00 AM EST

Signed Document

Test Document-signed.pdf

E-Signature Details Page and Audit Log

Signed Document

Test Document-signed.pdf

Audit Trail

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.

E-Signature Details

Download Document

DOCUMENT NAME

Test Document-signed.pdf

DOCUMENT ID

88

Questions about this document? Contact Lauren Johnson at lauren.johnson@formassembly.com

Audit Log

STATUS

TIMESTAMP

SIGNER

IP ADDRESS

DETAILS

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.
