

# Workflow Step – E-Signature

Download the PDF of this article.

## In this Article

[Overview](#)

[Requirements](#)

[Document Template Signature Tags](#)

[Add an E-Signature Step to a Workflow](#)

[E-Signature Properties](#)

[E-Signature Step Behavior](#)

[Workflow Response](#)

[Send a PDF File](#)

## Related Articles

### 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 'Signer' 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 search bar with a document icon, the placeholder text 'Enter your email', and a close 'X' button. Below the search bar is the text 'Basic Form'. At the bottom right of the dialog is a 'Refresh Lists' button with a circular arrow icon.

DESCRIPTION	DOCUMENT	SIGNER
<strong>Signer</strong> Assign a signer using an email address form field, a static value, formula or a variable.		
✓	signature	Close ▼
<div><div>📄</div><div>Enter your email</div><div>✕</div></div> <div>Basic Form</div>		
<a href="#">Refresh Lists</a>		

### 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

/x 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.

## 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 link to download the final document.



## Document Ready to View

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

[View Completed Document](#)

## 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.

E-SIGNATURE

Close Details ▾

**Test Document-signed.pdf**

STATUS

✔ Complete

ASSIGNEES

lauren.johnson@formassembly.com  
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

## 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.