Stripe Workflow Connector

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Overview

The Stripe Workflow Connector routes respondents to your Stripe Checkout page. Here, your respondents enter credit card and customer details directly within Stripe; payment fields are **not required** within the workflow or in the connector configuration. After completing the transaction, the respondent is routed back to the FormAssembly workflow.

Note:

- If Apple Pay and Google Pay are configured as payment methods on the authorized Stripe account, they will be available to respondents through the Stripe Workflow Connector.
- Test Mode accounts are not supported within the Stripe Workflow Connector. Stripe recommends the use of Sandbox accounts instead of Test Mode accounts. https://docs.stripe.com/testing-use-cases

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Requirements

To use the Stripe Workflow Connector, a FormAssembly user must

- be part of a Team plan or higher
- purchase FormAssembly's Payment Connector Add-on with Stripe user permission enabled

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General Connector Configuration

Refer to our Workflow-native Connectors article for general configuration information.

Stripe Subscription Actions

The **Set Up Recurring Charge** and **Add Recurring Charge Line Item** actions work together to create new recurring (subscription-based) Stripe transactions.

Action: Set Up Recurring Charge

The **Set Up Recurring Charge** action is used to initiate a new recurring charge (subscription) via Stripe.

Upon selection, a dependent action labeled **Add Recurring Charge Line Item** is automatically created. This

dependent action is required and used to define the first subscription item. Additional items can be configured by adding separate **Add Recurring Charge Line Item** actions.

When a recurring charge action is triggered, the respondent is redirected to a Stripe-hosted Checkout page. All payment information is entered on this page—no payment fields are required within the workflow or in the connector configuration.

After completing the transaction, the respondent is automatically redirected back to the next step in the workflow. The return path is defined in the workflow builder and does not require additional configuration in the Stripe connector.

Recurring Charge Metadata

Custom metadata can be passed to Stripe as key-value pairs. Metadata may be used for internal tracking or contextual information and is stored with the subscription object in Stripe. Dynamic values from the workflow may be referenced via a form field dropdown or the formula editor.

Recurring Charge Return Variables

Return variables capture values from the Stripe Checkout session that can be used in downstream steps of the workflow. Supported return variables include:

- **Subscription ID:** the unique identifier for the checkout session
- **Subscription URL:** the URL to the checkout session page in the Stripe dashboard
- **Product ID**: the unique identifier for the product associated with the recurring charge
- **Product URL**: the direct link to the product page in the Stripe dashboard

Action: Add Recurring Charge Line Item

This dependent action is required for each recurring charge. Additional recurring charge line items can be added to the Stripe checkout by selecting **Add Action → Add Recurring Charge Line Item**.

While multiple recurring charge line items can be added to the same Stripe checkout, note that all items within a single checkout must have the same **billing interval** and **currency**. If multiple recurring line items are configured but these conditions are not met, the connector will select a single item closest to the bottom of the configuration tab.

Return variables for recurring charge line items include:

- **Product ID**
- **Product URL**

Stripe One-Time Charge Actions

The **Set Up One-Time Charge** and **Add One-Time Charge Line Item** actions work as a parent/child pair to enable single-charge (non-recurring) transactions. These actions must have a **dependency** set between them to function correctly.

Action: Set Up One-Time Charge

The **Set Up One-Time Charge** action creates the base one-time charge transaction. This action defines the

parameters required to initialize the checkout session for one-time charges.

Dependent **Add One-Time Charge Line Item** actions can be added to specify individual products or charges. Each dependent line item must reference the parent **Set Up One-Time Charge** action through its dependency settings.

One-Time Charge Return Variables

Users can return the following values from a one-time charge transaction as return variables for use later in the workflow:

- **Payment ID:** the unique identifier for the payment record in Stripe
- **Payment URL:** the direct link to the payment record in the Stripe dashboard
- **Payment Status:** a text value indicating whether the payment was received

Return variables can be mapped to form fields or workflow variables, allowing payment details to be referenced in later workflow steps or for confirmation messages.

Action: Add One-Time Charge Line Item

This dependent action defines the individual line item(s) for the one-time charge checkout. Users can select an **existing product** from their Stripe account or define a **custom charge**.

Type of One-Time Charge

Users can select the **Type** of one-time charge:

- **Existing product:** pulls products directly from the authenticated Stripe account's product catalog.
  - After selecting "**Existing product**," a dropdown or type-ahead search field displays available Stripe products.
  - Once selected, users can specify the **quantity** for that product.
  - **Return variables** for existing product line items include **Product ID** and **Product URL**
- **Custom charge**: creates a one-time charge that does not exist in the Stripe product catalog.
  - When "**Custom charge**" is selected, users can manually set the **Name**, **Description**, **Currency**, **Price**, and **Quantity** for the charge.
  - **Custom metadata** can be added to custom one-time charge line items for internal tracking or contextual data.
  - **Return variables** for custom one-time charge line items include:
    - **Product ID**
    - **Product URL**
    - **Price ID**
    - **Price URL**

Note:
- Custom one-time charges will not be created or added to the authenticated account's Stripe product catalog. However, they can be referenced later by searching for the Product ID or by using the Product URL to view the corresponding record in Stripe.
- Any metadata added to the custom one-time charge can be viewed on the product's detail page in the Stripe dashboard.

Multiple One-Time Charges

Multiple one-time charges can be added to a single checkout by selecting **Add Action → Add One-Time Charge Line Item**.

Each of these actions must have a dependency set to a parent **Set Up One-Time Charge** action.

Combining One-Time and Recurring Charges

One-time charges (both existing and custom) can be combined with recurring charges in a single checkout session, provided all charges share the **same currency** and **billing interval**.

Error Handling

If an error occurs during the checkout process—or if the respondent cancels the payment by clicking the back button—the workflow will follow the routing defined in the **Error Handling** tab.

The Error Handling configuration includes a field to specify which step the respondent should be directed to in case of an error. This applies to both payment failures and user-initiated cancellations.
