Fube

GUIDE

How to set up customer onboarding in the portal and send them documents to sign



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> Onboarding a new customer is usually a chain of emails: ask them for their NIF, send them the contract, remind them to sign it, ask for the certificate that was missing. And months later, another one: 'sign this addendum for me', 'can you send it back signed?'. The customer portal turns both chains into something the customer does on their own, from their portal: **an onboarding** with the steps you decide and **documents to sign** that you send them when needed. Every signature is stored with its evidence and a PDF.

This guide covers the three pieces in the order it makes sense to set them up: the documents that are signed, the onboarding and, finally, how to send a document for signature and where the evidence is kept.

Before you start

- **A plan that includes the portal.** It doesn't come with every plan — not even every paid one. You can see which ones include it on the **pricing** page.
- **The portal open and your customer with access.** To complete their onboarding or sign, your customer has to log in to their portal. If you haven't set it up yet, start with the guide to **activating the customer portal** and come back here.
- **For onboarding, Customer onboarding ticked** under **What your customers see**, in the portal's **Settings** tab. You don't need it to send a standalone document for signature.

Everything is in **Sales** → **Customer portal**, in three of its tabs:

Tab	Previously called	What it's for
Documents to sign	Templates	The contracts, mandates and so on that your customers sign

Tab	Previously called	What it's for
Onboarding	Onboarding or flows	The steps a customer completes the first time they log in
Signatures	Signatures	What has been signed, what has been sent and what is still awaiting signature, with its evidence

Each tab appears if your role has permission for it, so you may not see all three; and if you had an old Settings address saved, it takes you to the new tab. The portal is marked as **beta** within the app: it works, but it's worth knowing.

Step 1 — Write the document they will sign

If your onboarding will include a signature step, or you're going to send something for signature, start here. If your onboarding only asks for details and files, skip this step.

Go to the **Documents to sign** tab and click **New document**. It's a single screen: at the top, the name and how it's signed; on the left, the document text, in a formatting editor; and on the right, the **Filled in by the customer** panel.

1. **Name.** Give it one your customer will understand, because **they see it**: it appears in the email you send it with and above the document. ‘Service agreement’, ‘SEPA mandate’.
2. **How it's signed. Drawing the signature**, with a finger or the mouse, or **Ticking ‘I accept’**, a checkbox. It's chosen in the document, so it applies equally in an onboarding or when sent on its own.
3. **The text.** Type it or paste it into the editor.
4. Click **Create document**. A name and some text are required. From then on **it saves automatically**: at the top you'll see **Saving…** and **Saved** as you type.

What the customer fills in, in braces

Anything your customer needs to enter — their job title, the account number, the service start date — you write **in the text itself, in double braces**: for example, `{{Cargo}}`. As soon as you type it, it appears automatically in the **Filled in by the customer** panel. You can also click **Customer field**, in the editor toolbar, type the name in the panel and click **Add**: it inserts it wherever your cursor is.

In the panel, each field has:

- **Its name**, which is what your customer reads in the blank.
- **The type**: Text, Long text, Number, Date, Email, Phone, List or Checkbox.
- **Required**, if they can't sign without it.
- **The options**, if it's a list, separated by commas.

If you use the same field in two places in the text, the panel tells you how many times it appears: your customer fills it in once and it appears in all of them. And if you delete it from the text, it disappears from the panel. What fields used to have — key, default value, autofill, help text — and the document's category no longer exist: a field is always something the customer enters.

What Fube already knows: Insert data

For what Fube already knows, you don't need a field. Click **Insert data**, in the editor toolbar, and choose:

Group	Data
Customer	Name, email, NIF/CIF, phone and address
Your company	Name, NIF/CIF, email, phone and address
Date	Today's date, the year and the month

They're filled in automatically, with each customer's details, when they open the document.

And here's the warning that will save you some grief: if a customer **is missing that detail** in their record — you haven't added their phone number, for example — their document doesn't show a blank space: **the unfilled data appears, in braces**, something like `{{client.phone}}`, in the middle of the text they're about to sign. Complete their record before sending it to them, or, if you won't always have that detail, ask them for it with a field in braces.

Preview it with their details before using it

At the top right you have **Edit** and **View with their details**. In **View with their details** you choose a customer and see the document exactly as it will appear to them; if you don't choose one, it appears with sample data. What the customer fills in appears in blue. It's the best moment to catch the detail a customer is missing.

Editing a document that has already been signed

No need to worry. **Each signature stores the text exactly as it was signed**, so whatever you change applies to future signatures and doesn't affect earlier ones. If the document already has signatures, the screen itself reminds you.

Next to the name you'll see the **Version**. It doesn't go up every time it saves: it goes up **when you change the text of a document someone has already signed**, to tell apart what each person signed. The signed version appears in the evidence for each signature.

The document list

The **Documents to sign** tab shows, for each document, how it's signed, how many fields the customer fills in, **where it's used** — in which onboardings, or **Standalone** if in none — and how many signatures it has, signed and pending. From each row's menu you can **Edit**, **Send for signature…**, **Duplicate**, **Deactivate** and **Delete**.

A document that has already been signed or sent for signature can't be deleted: it's deactivated. Each signature keeps its document, which is why Fube doesn't let you delete it. Once deactivated, it can't be sent for signature or used in a new onboarding. **Delete** only appears for those that nobody has signed and that have never been sent for signature — even if later withdrawn — and if an onboarding used it, that onboarding loses that signature step.

Step 2 — Create the onboarding

Go to the **Onboarding** tab and click **New onboarding**:

- **Name**. **Your customer sees it**: it's the title of their onboarding. ‘Welcome to Estudio Nadal’ is better than ‘Standard onboarding v2’.
- **Description**, optional. They see this too: it's the sentence that appears below the title. If you leave it empty, it reads ‘Complete these steps to get started. You can stop halfway and carry on another day.’
- **Active**: if you switch it off, the onboarding can't be assigned to any customer. Useful for retiring an old one without deleting it.
- **Default**: the one completed by customers who don't have another assigned. **There can only be one**: when you tick another, the previous one stops being the default.

Save and you go straight to its editor, which is where the steps are set up. Later you open it by clicking the onboarding in the list, or with **Edit** in its menu.

Step 3 — Add the steps and view them as your customer

The onboarding is edited **on a single screen**, and **everything saves automatically**:

- **At the top**, the **Name**, **Who completes it** — you'll see this in step 4 — and the **Active** switch, and below, **What you tell them at the start**: the description from step 2, the sentence your customer reads under the title.
- **On the left**, the steps, numbered in the order your customer will complete them. **They're reordered by dragging** them by the handle on their left — with the keyboard, using space and the arrow keys —, **they're configured by opening them** with a click and **they're added with Add step**.
- **On the right**, **How your customer will see it**: the step you have open exactly as it will appear in their portal, with the same buttons, **on desktop or on mobile**, and changing as you type. It's where you spot the instructions that made much more sense in your head.

There are four types of step:

Step type	What your customer does	What you set up
Request details	Answers your questions	The **Questions**, added with **Add question**: each with its type—Text, Long text, Number, Date, Email, Phone, List or Checkbox—, whether it is **Required** and, if it is a list, its options
Sign a document	Reads one of your documents to sign, fills in its fields and signs it	Which **Document**. How it is signed and what is filled in is set by the document itself (step 1)
Accept terms	Reads a text and ticks 'I have read and accept the terms'	**The terms**, the text they read
Upload a file	Attaches a file: their logo, a certificate, their scanned CIF	**Which files it accepts**—PDF, Images, Word, Excel or Compressed; if none is ticked, any—and the **Maximum size**: 1, 2 or 5 MB. 5 MB is the most that

Step type	What your customer does	What you set up
		can be uploaded in an onboarding, and the editor reminds you of this

The old ‘Custom form’ and ‘Fill in details’ are now a single one: **Request details**.

In addition, each step has:

- **Title** and **What you tell them**: what your customer reads to know what to do.
- **Required** or **optional**. An optional step can be skipped—they see **Skip this step**—; a required one cannot: their onboarding is not considered finished until it is done.
- **Remove step**. Careful: anything your customers had already answered in that step is lost.

To add a **Sign a document** step you need at least one active document; if you do not have one, Fube asks you to create it first in **Documents to sign**. Next to the chosen document you have **Open document**, to go and correct it without losing your place.

Step 4 — Decide who completes it and see how it is going

Who completes it has two options:

- **Everyone who does not have another one**: this is the default onboarding. There can only be one.
- **Only those you assign it to**: it is completed by the customer you assign it to on their record.

To assign an onboarding to a specific customer, go to **their record, Portal tab** (in **Sales → Customers**) and, under **Onboarding**, choose between **The default onboarding** and any of your own. That line appears if the customer can see **Customer onboarding**.

Progress can be seen in three places:

- In the **Onboardings** list, the **Progress** column: how many customers have finished it and how many have it half done.
- In the portal’s **Customers** tab, each customer’s **Onboarding** column and the **Unfinished onboardings** figure.

- In the Portal tab of their record.

What they answered, step by step, is also in the Portal tab of their record, under **Onboarding**: the details they filled in with the name of each field, when they accepted the terms, the file they uploaded—with **Download**—and what they signed, with **View signature** for its evidence. Anything they have not done yet appears as **Not answered**.

There are four statuses: **Not started**, **In progress**, **Completed** and **Abandoned**. If the customer leaves the onboarding half done and comes back, they continue where they left off. And **when a customer finishes their onboarding, a notification pops up in the bell** for whoever in your team can see onboardings: you can now start working with them.

To see it through their eyes, open their portal with **View as this customer**, from the Portal tab of their record or from their row in the **Customers** tab. It is only for looking: in this preview the onboarding is not filled in or signed, and the customer does not receive any notification.

Changing an onboarding that customers have half done

All your customers—those starting today and those who were halfway through—follow the onboarding exactly as it is saved at that moment. If anyone has it half done, the editor tells you at the top, with their name. What you should know:

- **What they have already done stays done, even if you change the order.** Each answer is tied to its step, not to its position, and the customer continues from the first step they have left to do in today's order.
- **If you add a step, it will also be requested** from anyone who has it half done, in the place you have given it. If it is required, they will not finish the onboarding without doing it.
- **Changing the text of a step is safe**: they will see the new version, and what they already answered is still there.
- **Removing a step deletes what was answered in it.** Fube reminds you before removing it.

Sending a document for signature, without onboarding

Not everything is signed during onboarding. An annex, a renewal, a SEPA mandate that comes later: that is what **Send for signature** is for, and you have it in three places:

- In the **customer record, Portal tab**, in the **Signatures** section.
- In the portal's **Signatures** tab, at the top.
- In the **Documents to sign** tab, in a document's menu: **Send for signature…**.

A side panel opens:

1. **Customer**, if you are not coming from their record.
2. **Document**: one of your active documents, with how it is signed and what is filled in.
3. **Sent to**: the people with access to that customer's portal. Those who have already logged in at some point are ticked—or all of them, if nobody has logged in—; tick or untick whoever you want.
4. **Message**, optional: it appears in the email and above the document.
5. Below, **What they will see**: the document with that customer's details and what they will have to fill in. Check it: if a detail is missing, you will see it here.
6. Click **Send for signature**.

Each ticked person receives an email from your company asking them to sign the document, with a **Read and sign** button that **takes them straight into the document**, without a password. That button is valid for **7 days and only once**; if it expires, they log in to your portal with their email and find it on their Home page, under **To sign**.

Any of them can sign it, and as soon as one signs, it is signed. The evidence shows who it was and which email they logged in with.

Before sending it, Fube checks three things:

- **The portal must be open**: if it is closed, your customer could not log in to sign.
- **Someone from that customer must have access.** If nobody does, the panel tells you: give them access first from their record.
- **The document must be active.**

It stays **Pending** until it is signed, and from the **Signatures** tab you can remind them or withdraw it.

The Signatures tab

This is everything signed in your portal, all together: what you send for signature, what was signed in an onboarding and what is still to be signed in half-done onboardings. At the top you have a search box by document or customer, the **All**, **Pending** and **Signed** tabs with their count, and the **Send for signature** button. The Signatures tab also has a counter showing pending ones, so you do not miss any.

For each one you see the document and where it came from—who sent it, or at which step of their onboarding—, the customer, the status (**Pending**, **Signed** or **Withdrawn**), when it was requested, and when it was signed and with which email. What you can do depends on the status:

Status	What you can do
Signed	Click it to see its evidence; in its menu, **Download PDF** and **View evidence**
Pending, sent from Fube	**Remind them**, which sends the email again with a new button, or **Withdraw**: they no longer see it to sign and it stays in the list as withdrawn
Withdrawn	**Send again**
Pending, in an onboarding	Nothing from here: it is a step of their onboarding, and is done within it

The evidence for each signature

Each signature—in an onboarding or sent on its own—is saved with what makes it evidence. You see it by clicking it in **Signatures**, or in the Signatures section of the customer record, under **Signature evidence**:

- **Document**, with the version that was signed.
- **Signer**: their name, if you entered it when giving them access, and **the email they logged in with**.
- **How they identified themselves**: with the single-use button sent to their email, and when it was sent.

- **How they signed**: by drawing their signature or ticking ‘I accept’.
- **Date and time.**
- **From**: the IP address and the browser.
- **Fingerprint (SHA-256)**: a code that identifies the signed text. If a single letter were changed, it would no longer match.
- **Requested by**: who in your team sent it and when, or which step of which onboarding it came from.
- **The text they signed**, exactly as they had it in front of them, and the stroke of their signature if they drew it.

The signed PDF contains all of that: the text and the signature, the fingerprint in the footer of each page and, at the end, a sheet with the evidence and what they filled in. You download it with **Download PDF**.

When someone signs:

- **The signer** receives a copy of the PDF by email. They always get it, however your company's emails are set up.
- **Your company** does too, at its billing email address, as does the member of your team who sent it, if it was sent from Fube. This notice does depend on your company's **notification emails**.
- **A notice appears under the bell** for anyone on your team who can view signatures.

It is a simple electronic signature: it records who signed, when, from where and which text, but **it is not a qualified signature**, like one made with a digital certificate. If a particular document requires that other kind of signature, check with your adviser.

And two things worth being clear about:

- **What was signed is in the signature, not in the document.** The document shows today's text; what each customer signed is in their signature and in their PDF. If anyone ever asks what they signed, look it up there.
- **A signature cannot be modified or deleted, nor can it be created from within Fube.** This is not a usage rule: the app offers no way to do it, on purpose. The only way for a signature to exist is for your customer to make it from their portal.

Signatures made before October 2026 did not store the fingerprint, and those made before email access did not store who logged in either: you will see this noted in their evidence.

Edge cases and common errors

- **'The signed document shows `{{client.phone}}`'.** That customer had no phone number when they signed. Complete their record; what was signed stays as it was signed, so, if the detail was important, send it to them to sign again.
- **'It won't let me add a signature step'.** You have no active documents: create one in **Documents to sign** and come back.
- **'It won't let me send it for signature'.** Read the notice: either nobody at that customer has portal access —grant it from their record—, or the portal is closed —open it with **Open the portal**, in the **Settings** tab—, or the document is deactivated.
- **'My customer says the button in the email no longer works'.** It is valid for 7 days and only once. Ask them to log in to your portal with their email: they will find it on their Home page, under **To sign**. Or click **Remind them** in **Signatures** and they will receive a new one.
- **'I sent it to the wrong person'. Withdraw it** from **Signatures** and send it again to the right person.
- **'They have signed but I haven't received the email'.** First, check the spam folder. And the notice to your company depends on the **notification emails**: if you have them turned off in **Settings › Notifications › Email**, it is not sent, although the bell does notify you. This is explained in the guide on **choosing which emails you receive from Fube**. Your customer's copy does not depend on this, and the PDF is always available in **Signatures**.
- **'My customer says they haven't received their copy'.** Ask them to check the spam folder of the email address they used to log in and sign, as that is where it goes. If it is not there, download it from **Signatures** and send it to them yourself.
- **'I can't find Delete on a document'.** It has already been signed or sent for signature at some point, even if you withdrew it: deactivate it.
- **'I want to retire an old onboarding'.** Deactivate it —**Active** toggle, or **Deactivate** in its menu— instead of deleting it: it can no longer be assigned and you don't lose anything along the way.

- **‘I have marked two onboardings as default’.** That is not possible: when you mark the second one, the first stops being the default.

Frequently asked questions

Can I request a signature from a customer who has already completed their onboarding?

Yes. With **Send for signature**, from their record, from the **Signatures** tab or from the document itself. You don't need an onboarding to sign.

Does the customer receive a copy of what they sign?

Yes. When they sign, they receive the PDF by email, with the evidence page at the end. And if you sent it to them for signature, they can also download it on the signing screen itself.

Can I edit a document that several customers have already signed?

Yes, without risk. Each signature keeps the text that was signed, and the document version goes up so that they can be told apart.

Which signature is valid, the checkbox or the drawn one?

Both are stored with the same evidence —who, with which email, when, from where and which text—, and both are simple electronic signatures. Which one you should request depends on what is being signed; if you have any doubts about a particular document, ask your adviser.

Can I have several onboardings at once?

Yes. The default one is completed by customers who don't have another, and you can assign any customer a different one from the Portal tab of their record.

Can the customer leave the onboarding half-finished?

Yes. When they return to their portal, they pick up where they left off.

Set up the onboarding once and forget about it

A well set-up onboarding turns three emails and two reminders into a few steps the customer completes in their portal whenever it suits them, and **Send for signature** does the same with whatever comes afterwards. And the day you need to show what they signed and when, it is stored with their email, the date, their IP address and the exact text. You can find full details of the feature on the page on **portal onboarding and contracts**, and if you don't have any customers in Fube yet, start by **creating your account** or with the guide on **creating a customer**.

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START TODAY

Put this into practice with Fube

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