



# NetDocuments + DocuSign eSignature Integration

Frequently Asked Questions

**netdocuments®**

You asked and we're answering! Based on our recent webinar the audience had some great questions about the NetDocuments + DocuSign eSignature integration, which we've answered below. Still have more questions? Email [hello@netdocuments.com](mailto:hello@netdocuments.com) and we'd be happy to help.

## Licenses and Access Questions

**Q: How do (I/the company) license the integration between NetDocuments and DocuSign?**

**A:** A DocuSign eSignature license is required, as well as the NetDocuments ORGANIZE solution, to leverage the integration. When ready to implement the DocuSign integration, contact your NetDocuments Account Manager to have it turned on in your NetDocuments environment. You can then enable it within the other section of the NetDocuments Admin Console.

**Q: Will anyone be able to send out DocuSign documents or just the users with a license?**

**A:** Each user must login with their DocuSign credentials when sending documents for signature, so you must have an active DocuSign license.

**Q: Is the NetDocuments user's account specifically linked to their DocuSign account?**

**A:** No, the user signs into DocuSign when sending the document for signature, so you may use different accounts. NetDocuments will remember the account credentials for 30 days, so you aren't required to login each time a document is sent.

## Self Help Questions

**Q: Is there documentation on the integration for Admins and users to view?**

**A:** Yes, documentation can be found on our support site [here](#).

## Integration Questions

**Q: Is there an integration between approval or publishing workflows and DocuSign?**

**A:** After you start the signature process from NetDocuments, you will access all existing DocuSign content and functionality in DocuSign. In Phase 2, DocuSign will be integrated within NetDocuments' DELIVER solution, which includes SetBuilder. This will provide greater flexibility when creating document sets for signature.

**Q: When you mentioned that the certificate is not saved into NetDocuments via the integration, where can a user find it?**

**A:** The certificate can be found within DocuSign as before. In the future, it may also be stored within NetDocuments.

## DocuSign Questions

### **Q: How does DocuSign handle authentication?**

**A:** When sending documents for signature from NetDocuments, you will need to login to DocuSign. Your login token will then be saved for 30 days.

### **Q: Does this integration work for anything you can do in DocuSign? Can you do a notarization and remote video interaction that can be recorded?**

**A:** Yes, the document starts and ends in NetDocuments, but you can access DocuSign to work with their additional functionality.

### **Q: If a DocuSign document does not start in NetDocuments, this integration won't automatically be able to bring it into NetDocuments, correct?**

**A:** Yes, that is correct. Only documents where the signature process is started in NetDocuments are returned automatically to NetDocuments.

## How It Works Questions

### **Q: Can you send more than one document at a time?**

**A:** You will be able to do this shortly. In the meantime, you may add additional documents within DocuSign or SetBuilder can be used to package multiple documents into a single PDF file.

### **Q: Can I set a signing order?**

**A:** Yes! You can set it on the NetDocuments screen or in DocuSign before sending.

### **Q: Does the signed document come back as a new document or a version 2 of the same document?**

**A:** For now, it is a new document. Most feedback we received was to upload the signed document as a new document instead of a new version, but we are creating functionality to provide the option of having the signed document come back as a new version.

### **Q: Where does the signed document show up?**

**A:** The signed document is stored in the same NetDocuments folder as the original document, and (Signed) is automatically appended to the Document Name.

### **Q: Do the originators and signers still receive the executed PDFs?**

**A:** Yes, email notifications that are sent out via DocuSign with the completed PDF will still be available even when sent out through the NetDocuments integration.

**Q: Can we leverage attributes in NetDocuments to quickly identify the DocuSign status?**

**A:** Yes, in the details panel of the document in NetDocuments, the signature status is tracked.

**Q: If a document is received via another company's DocuSign account, will the document automatically link into NetDocuments or will the recipient have to download it?**

**A:** Unless the document signature process originates from within NetDocuments, there is no connection, so it will not be pulled into NetDocuments automatically. You can easily upload the document into NetDocuments through the browser or by right-clicking on the downloaded document from your computer.

**Q: I don't see the option to send a copy, just set who is a signator. Is that a feature that will be added or do we have to get into DocuSign and go back to Edit recipients in order to change those options?**

**A:** NetDocuments provides the ability to add a recipient as a signer or to receive a copy of the document. You can also edit this list within the DocuSign interface.

## Signature Questions

**Q: If sending out for multiple signatures, is the document merged to include all signatures? How does this work in NetDocuments?**

**A:** The DocuSign signature process creates a fully executed PDF. It is that document that is returned to NetDocuments.

**Q: How do you handle sending multiple documents together for signature.**

**A:** We're creating this feature now. In the meantime, you can bundle multiple documents together using SetBuilder. In this case, the executed set is returned to NetDocuments like any other file.

## Template Questions

**Q: If we've created templates in DocuSign that have the subject/message already populated, can we use those via the NetDocuments integration?**

**A:** Yes, you can use any DocuSign templates you have already created with the integration.

**Q: Can this be used with power forms? Such as NDAs that are sent across that are saved as templates in DocuSign?**

**A:** If the document does not originate in NetDocuments, then this integration cannot be used. Files created as PDFs can still be uploaded to NetDocuments, but it simply won't happen automatically.



## Notification Questions

**Q: How will notifications work? Will it come from NetDocuments or DocuSign?**

**A:** Notifications will come from DocuSign just as they always have. In addition, you can see the status of your signature workflow using the document details panel in the NetDocuments interface.

## Status/Check Out/Locked Document Questions

**Q: When you send out for signature, can colleagues see the status of the envelope in NetDocuments if they don't have a DocuSign account?**

**A:** Yes, as long as they have access to the document list, they can track the status.

**Q: Does the integration “check out” the document so no one else can alter it while it’s in process?**

**A:** While a forced check-out does not occur, NetDocuments “locks” the document from being sent again through DocuSign. If you need to resend a document for signature, like for a date change, you will need to void the signature workflow and recreate it.

