

The 123s of DocuSign for NetDocuments

Send a document for signature — and get the executed copy back — without ever leaving NetDocuments.

- ⓘ Before you begin:** Your firm's DocuSign integration must be enabled and you'll need a DocuSign account tied to your work email. If you're unsure whether it's set up, reach out to your company admin or L2 contact.



WHAT IS IT?

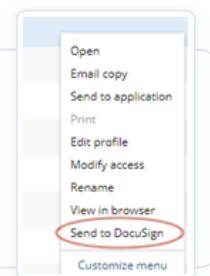
The DocuSign integration lets you send a NetDocuments file out for electronic signature — and get the executed copy back — without ever leaving NetDocuments. There's no downloading to your desktop, no re-uploading, and no hunting for the signed version in your email.

HOW TO USE IT

1

Send a Document for Signature

- › In NetDocuments, locate the document you want signed.
- › If prompted, sign in with DocuSign — once per session.
- › Right-click the file and choose *Send to DocuSign* (or use the ellipsis menu).
- › Set up the envelope and signing fields, then click *Send*.



2

Track Signing Status

- › Open the document in NetDocuments and check the *eSignature* tab or status panel.
- › To cancel or change the envelope, do that from DocuSign directly.
- › Anyone with access can see this status — colleagues don't need to ask for an update.

3

Find the Signed Copy

- › Once everyone signs, the executed PDF is filed back into the same NetDocuments folder, named with *(Signed)* appended.
- › Both versions stay in NetDocuments and inherit the original's profile.
- › The Certificate of Completion is included as part of the executed PDF.

TIPS

- ☀ **Profile the file before you send.** Make sure metadata — matter, client, document type — is correct. The signed copy inherits that profile, so **good in = good out**.
- 👁 **Watch for the DocuSign indicator.** The icon next to a filename signals it's out for signature — don't edit or re-send until the workflow completes.
- ☀ **Send the final version.** Once the envelope is sent, NetDocuments locks the file from being sent again through DocuSign. To resend, you'd have to void the envelope in DocuSign and start over.

FREQUENTLY ASKED QUESTIONS

- Q. Can I send more than one document in a single envelope?**
Not directly through the integration — it sends one file at a time. The standard workaround is to combine the documents into a single PDF (*SetBuilder* works well for this) and send that.
- Q. Where does the signed document end up?**
Back in the same NetDocuments folder as the original, named with *(Signed)* appended. The Certificate of Completion is included as part of the executed PDF.
- Q. Why is the file "locked" after I send it?**
ND prevents the same document from being sent twice.. To resend, void the envelope in DocuSign and the document will become available again.