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NetDocuments + DocuSign Integration

🕒 Feb 2, 2026 Knowledge

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Overview

Joint NetDocuments and DocuSign users who utilize the DocuSign eSignature product can now take advantage of the [NetDocuments DocuSign integration](#) (<https://www.netdocuments.com/products/electronic-signature>). This integration will allow users to send documents for signatures using DocuSign and have the documents automatically uploaded into NetDocuments once signed. This is available with the NetDocuments ORGANIZE solution. Any Organization interested in utilizing this integration should reach out to their NetDocuments Account Manager to enable this feature.

Enable

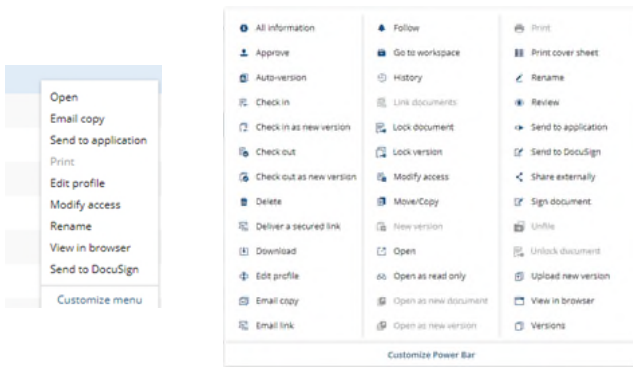
To enable the DocuSign Integration, a user must be a **Cabinet Administrator** in the cabinet in which they wish to enable the integration. A cabinet administrator will need to log into the NetDocuments admin console, navigate to the **Cabinets** page and select the appropriate cabinet. Once on the cabinet configuration page, scroll down the bottom of the page where a check box next to the words **Enable DocuSign Integration** will be available. Check the box to enable the integration and hit **Submit**.

The screenshot shows the 'Other' configuration tab in the NetDocuments admin console. The 'Enable DocuSign Integration' checkbox is checked and highlighted with a red box. Other visible settings include: Rights required to customize workspace layout (VES selected), Store document comparisons as (Document attachments selected), Allow online editor (Microsoft Office Online selected), Allow users to freeze ACL (No selected), Automatically freeze ACL when manually changed (Enable selected), Allow VESA users to lock documents (Yes selected), Permanently remove purged documents (After 30 days selected), Previewer (SmartView selected), Default ndFlexStore location (None selected), and Require ndClick for internal users (Enable selected).

How to Use the Integration

Send a Document For Signature

To send a document for a signature using DocuSign, simply select a document and either choose **Send to DocuSign** by right clicking on the document or navigating to the **More** menu and click **Send to DocuSign**.



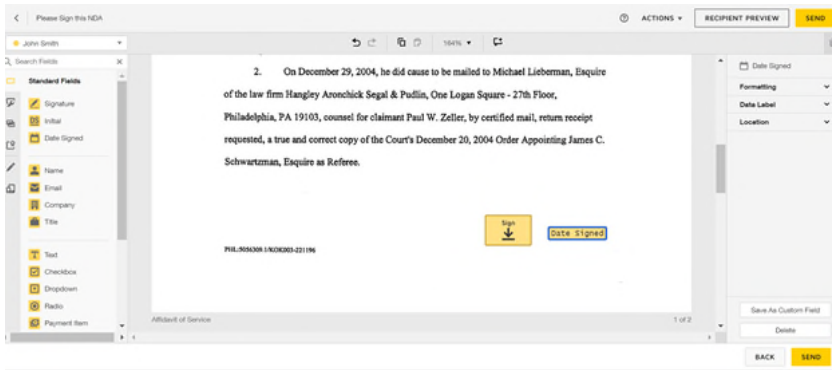
IMPORTANT: The NetDocuments integration with DocuSign adheres to the same character, page and size restrictions as DocuSign's eSignature product. Most notably, it doesn't allow documents to be uploaded that are greater than **25 MB**. Additionally, the max number of pages allowed in a single document is 2000 and the max number of documents that can be sent at one time is 20. To see a full list of size limits for DocuSign, click [here](https://support.docusign.com/s/articles/DocuSign-Documents-File-Size-Limitations?language=en_US&rsc_301) (https://support.docusign.com/s/articles/DocuSign-Documents-File-Size-Limitations?language=en_US&rsc_301).

A modal will appear detailing the steps of the process, click **Continue** to start the **Send to Signature** process.

The new screen will allow users to enter recipients who either need to sign or receive a copy of the document. An envelope will be created. Users will also be able to craft their email subject line and email message:

There is also an option to **Save signed document as a new version of this document**. If this option is chosen, once the document has been signed by the recipient, a new version of the signed document will be added to the existing document in NetDocuments. If this option is not selected, the signed document will be put into NetDocuments as a separate document with a new documentID.

Once submitted, users will be directed to an embedded DocuSign screen that will allow them to choose where on the document the signature should be placed, the date, along with a large array of options:



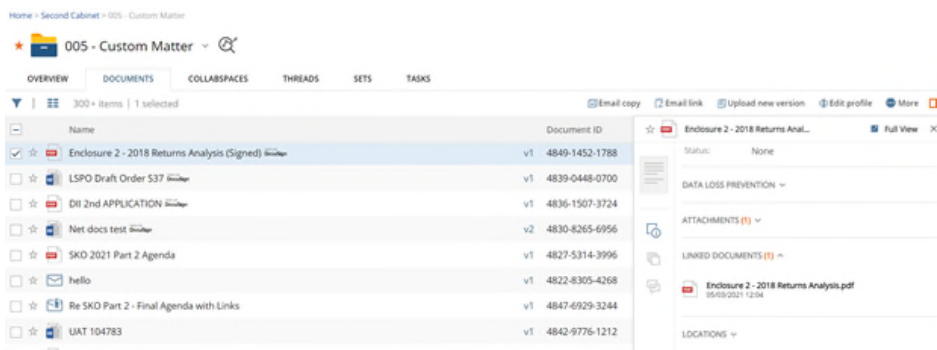
Once complete, hit **Send** and the document will be sent to the recipient(s) their designated email. In the document list view, the document will now have a logo next to the name that reads **Sent via DocuSign**:

<input type="checkbox"/>	★		DII 2nd APPLICATION	v1	4836-1507-3724
<input type="checkbox"/>	★		Net docs test	v2	4830-8265-6956

Once completed (signed), the new, executed document will show up in the original folder inside of NetDocuments with the word **Signed** in parentheses. If the **Save signed document as a new version of this document** option is selected, a new version will appear in the version menu of the originally sent document instead.

<input type="checkbox"/>	★	Name	Document ID
<input type="checkbox"/>	★	020718 - Indications (Signed)	v1 4812-7491-4492
<input type="checkbox"/>	★	020718 - Indications	v1 4845-6311-7756
<input type="checkbox"/>	★	SKO 2021 Part 2 Agenda (Signed)	v1 4850-9907-1164

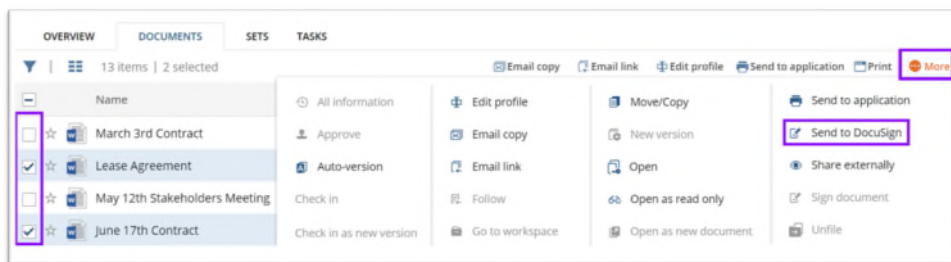
The original document will no longer have a **Send via DocuSign** logo next to it and will be linked to the signed document:



Sending Multiple Documents for Signature at One Time

If multiple documents need to be sent for signature in one envelope, the process is similar to sending one document for signature.

In NetDocuments, select the checkboxes next to the documents you would like to send for signature. There is no limit on the number of documents you can select. Once the documents have been selected, go to **More>Send to DocuSign**.

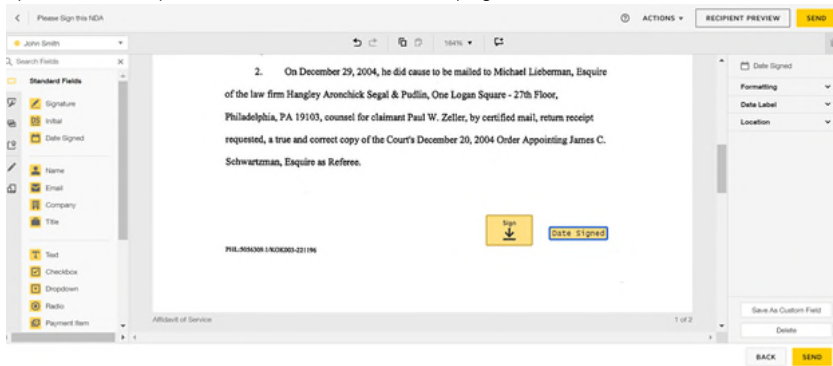


Just as with sending a single document for signature, a modal will appear. Click **Continue** to start the **Send to Signature** process in a new tab.

The user will be presented with the same screen used for sending a single document. They will see in the **Files to be Included in this Envelope** field, the names of the documents selected from NetDocuments. The document names will be separated by a comma as shown below:

Once the fields have been filled out, select **Submit** to generate the envelope.

After the envelope has been generated, the documents will all display in that singular envelope. The user may choose where a signature or any other DocuSign options should be placed and then click **Send** in the top right corner.

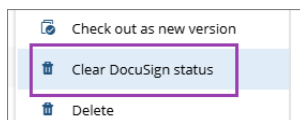


In NetDocuments, within the document list view, the document will now have a logo next to the name that reads **Sent via DocuSign**. Once completed (signed), the new, executed document will show up in the original folder inside of NetDocuments with the word **Signed** in parentheses. If the **Save signed document as a new version of this document** option is selected, a new version of each document will appear in the corresponding version menu of the originally sent documents instead.

Note: If multiple documents are sent for signature and the recipient only chooses to sign a singular document in that envelope, all documents will show as signed within NetDocuments, even though only one document within the envelope was signed.

Clear DocuSign Status

If a user wishes to clear the DocuSign status from a document, the **Clear DocuSign Status** option is available in the **More** menu, the **PowerBar**, and the **right-click** menu. When selected, users will see a confirmation dialog before the status is cleared. Clearing the DocuSign status removes the DocuSign icon from the document and allows the document to be sent again through DocuSign. However, the document name will still show **Signed** and signer information will remain visible in SmartView.



Title

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App Builder (PatternBuilder) (/s/topic/0TOQj0000007rY6OAI)		Flexstore Management (/s/topic/0TO4Q000000cNRJWA2)	
ndMAX & AI Assistant (/s/topic/0TODm0000008WYgOAM)		ndLink (/s/topic/0TO4Q000000cNWyWAM)	
SetBuilder (/s/topic/0TO4Q000000cNdjWAE)		Log Management (/s/topic/0TOQj0000007rZ0OAI)	
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