DocuSign

DocuSign Negotiate for Salesforce

User Guide

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DocuSign Negotiate for Salesforce Overview (User)

DocuSign Negotiate for Salesforce is an app contained in the DocuSign Apps Launcher for Salesforce package. DocuSign Apps Launcher is a unified bundle of DocuSign apps: DocuSign eSignature for Salesforce, DocuSign Gen for Salesforce and DocuSign Negotiate for Salesforce. Each app is configured and managed on a centralized platform in Salesforce. This allows administrators to easily configure, use and manage the many features and functionalities available.

DocuSign eSignature for Salesforce lets you add editable fields to a contract so that recipients can fill out the necessary details and sign the document electronically. The returned contract is a locked and legal PDF contract.

DocuSign Gen for Salesforce is a fast and easy way for users to generate contracts. The app is fully integrated with your Salesforce organization, and pulls details from Salesforce records directly into your contract without manual input. The result is a clean, accurate contract that's generated with the click of a button on the Salesforce record page.

DocuSign Negotiate for Salesforce works with DocuSign Gen to automate the entire agreement process. Gen creates contracts and Negotiate allows you to send them for internal collaboration, external review and eSignature. The two let you maintain version control and keep contract activity in a central location. You'll see increased productivity, reduced business risk, and accelerated time to close.

The apps contained in the DocuSign Apps Launcher for Salesforce managed package work in conjunction with each other to get your users from contract generation to review to signature with speed, efficiency and accuacy. DocuSign Gen for Salesforce creates a new contract with the click of a button, the new contract is sent for internal approval or external review with DocuSign Negotiate for Salesforce and the finished contract is then sent to recipients for signature with DocuSign eSignature for Salesforce.

Note: DocuSign Negotiate for Salesforce does not come with a Gen purchase. The two products work seamlessly together, but are sold separately.

This guide demonstrates:

- Importing content to the DocuSign Files section of a Salesforce record

- Activating your Gen or Negotiate account

- Using Negotiate to send for approval or review

- Comparing document versions with redlines

- Approve Negotiate requests on behalf of another user, resend reviews and cancel requests

- Using the eSignature process to tag and send contracts

- Downloading, deleting, renaming, versioning and copying content in DocuSign Files

Activate Your Negotiate and Gen Account

Only a DocuSign administrator can grant DocuSign Gen and Negotiate access to other users in a Salesforce organization. Salesforce users who are given access to Gen or Negotiate will receive an email stating **Action Required - Activate Your DocuSign Account**. Users must then click the activation link to finish the user activation process.

Once their DocuSign user is active, Salesforce users are able to receive and send documents for internal approval, as well as view and take action on documents that have been imported to DocuSign Files on their Salesforce pages.

1. Check your email Inbox for messages titled: **Action Required - Activate Your DocuSign Account**.

   Note: If the message is not in your Inbox, check your Spam folder, as email services sometimes mistakenly categorize activation messages as Spam.

2. Open the activation email.

3. Click the **Activate** button. A browser tab opens with the DocuSign login page.

4. One of the following will occur:

   a. **You are already a DocuSign user**:

   - The DocuSign login page opens.

   - Log in with your existing DocuSign credentials.

   - An invitation page opens.

   - Click the **Accept Invitation** button.
     Optional: Click the Decline Invitation button. This will keep your user in a Pending (inactive) status for DocuSign Negotiate and/or Gen.
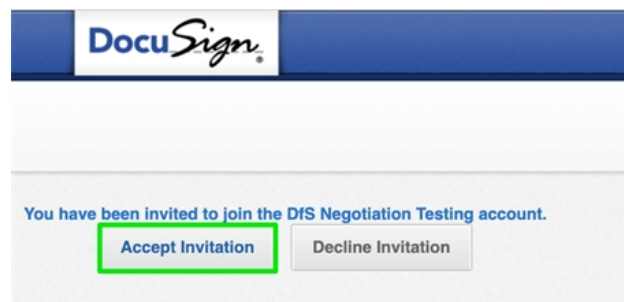
b. **You are not a DocuSign user**:

- The **Activate Your Account** pane opens.

- Create and confirm a **Password** for your new DocuSign user.

- Choose and answer a **Security Question** from the dropdown menu.

- Click the **Activate** button.

The process is complete. You have a DocuSign user with active status in DocuSign Gen, Negotiate, or both. You are now able to send and receive approvals and view content in Negotiate. Gen users are able to generate contracts from Salesforce pages with the click of a button.

Import and Edit DocuSign Files

Your administrator has added the DocuSign Files section to your Salesforce page lay-
outs. DocuSign Files is where you import documents and apply document actions to the
content. Content can either be added automatically by using DocuSign Gen for Sales-
force to generate a new contract from a Salesforce record page, or it can be manually
imported to the DocuSign Files section. From there, a host of actions can be taken on
the files within.

Add a File Using DocuSign Gen

[Follow these instructions](#) to add content to DocuSign Files by generating a new contract
with DocuSign Gen.

Import a File to DocuSign Files

Content can be added to the DocuSign Files section of Salesforce by manually import-
ing it.

1. Log into Salesforce as a user with DocuSign Gen **Generator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the **Import** or **Create an Agreement** buttons in the DocuSign Files sec-
   tion of the page.

4. Pick either:

   a. **Choose from Salesforce Files**, to import an existing Salesforce doc-
      ument.

- Check the box to the left of a single document from Salesforce.
  Note: Multiple document selection is not supported.

- Click the **Import** button. The New Agreement Created pane opens.

b. **Upload from PC** to add a file from your device.

- Click the **Upload** button, or drag files from Windows Explorer or Finder.

- Click the **Import** button. The New Agreement Created pane opens.

5. You are presented with three options: **Send for External Review**, **Send for Approval** and **Send for Signature**.

6. Select one of the options presented, or click the **Done** button to take no further action.

7. Refresh the browser tab and the file appears in the **DocuSign Files** section of the Salesforce record page.

The process is complete. The imported file has a number of options available in the DocuSign Files section.

Download Document from DocuSign Files

Documents that have been imported into DocuSign Files can be downloaded to your device using the Edit button.

1. Log into Salesforce as a user with DocuSign Gen **Generator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the Edit button ⌨ to the right of any file in the DocuSign Files section.

4. Select **Download** from the dropdown menu.

    A banner announces: **Successfully downloaded (file name)**

The process is complete. A copy of the document from DocuSign Files is saved in your device's Downloads folder.

Copy to Notes & Attachments

Documents that have been imported into DocuSign Files can be copied to the Notes & Attachments section of a Salesforce record using the Edit button.

1. Log into Salesforce as a user with DocuSign Gen **Generator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the Edit button [icon] to the right of any file in the DocuSign Files section.

4. Select **Copy to Notes & Attachments** from the dropdown menu.
   A banner announces: **Agreement export in progress. Please check Notes and Attachments section after some time.**
   A second banner announces: **Agreement has been exported successfully**.

5. Refresh the browser page. The Salesforce **Notes & Attachments** section displays a copy of the document in the DocuSign Files section.
   Note: The copied content in DocuSign Files is unaltered by this process.

The process is complete. The content selected to copy is now available in Salesforce Notes & Attachments.

Upload a New Version of a Document

Documents that have been imported into DocuSign Files can be versioned directly in the DocuSign Files section using the Edit button.

1. Log into Salesforce as a user with DocuSign Gen **Generator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the Edit button [icon] to the right of any file in the DocuSign Files section.

4. Select **Upload a New Version** from the dropdown menu. The Upload a New Version pane opens.

5. Click the **Upload** button, or drag the new version of the document from File Explorer or Finder.

Upload a New Version

Uploading a file will create a new version of this document and update the document's activity timeline. You will see the versions listed in descending order, with the newest version on top.

Agreement Name	Date Uploaded
Fresh Software NDA Template.docx	10/24/2019

Fresh Software Sales Order Template NEW.docx
107.42 KB • docx ✕

Cancel Upload
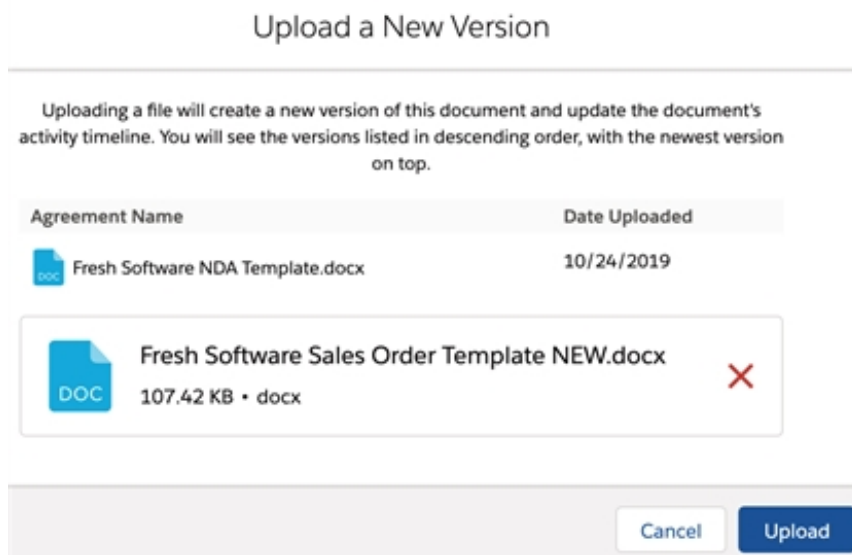
A banner announces: **A new version of (document name) has been uploaded**. You are returned to the Salesforce record page. The file that was sent appears in the DocuSign Files section with a **New Version** status button below it.

Note: If the new version has a different name than the document in DocuSign Files, the original name will be retained.

6. Click the **Show Activity** link to the right of the file to see progress. Click the **Hide Activity** link to hide this information.

The process is complete. The content is now updated, with the original file name remaining the same.

Rename a Document

Documents that have been imported into DocuSign Files can be renamed directly in the DocuSign Files section using the Edit button.

1. Log into Salesforce as a user with DocuSign Gen **Generator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the Edit button [✏ ▾] to the right of any file in the DocuSign Files section.

4. Select **Rename** from the dropdown menu. The Rename Agreement pane opens.

5. Make changes to the file name in the Agreement Name field.

6. Click the **Rename** button.

A banner announces: **(document name) has been renamed**. You are returned to the Salesforce record page. The file that was sent appears in the DocuSign Files section with a **New Version** status button below it.

Note: If the new version has a different name than the document in DocuSign Files, the original name will be retained.

7. Click the **Show Activity** link to the right of the file to see progress. Click the **Hide Activity** link to hide this information.

The process is complete. The content is now renamed.

Delete a Document

Documents that have been imported into DocuSign Files can be deleted directly from the DocuSign Files section using the Edit button.

1. Log into Salesforce as a user with DocuSign Gen **Generator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the Edit button [✏️▾] to the right of any file in the DocuSign Files section.

4. Select **Delete** from the dropdown menu. The Delete Agreement pane opens.

5. Click the **Delete** button.
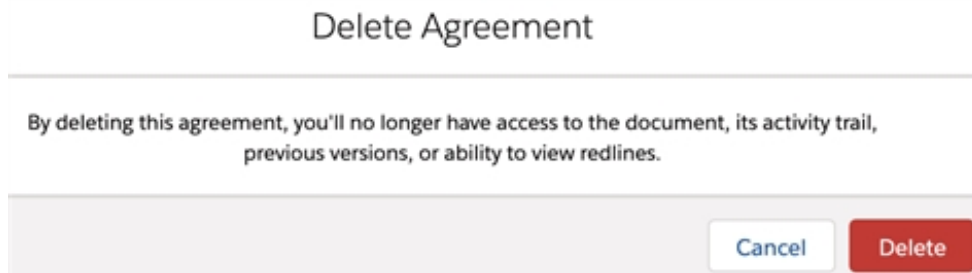
A banner announces: **(document name) has been deleted**. You are returned to the Salesforce record page. The file is no longer in the DocuSign Files section.

The process is complete. The content has been deleted.

Send an Agreement with Negotiate

With DocuSign Gen for Salesforce, you can generate a contract with the click of a button. DocuSign Negotiate for Salesforce lets send an agreement for Internal Review, External Review or eSignature.
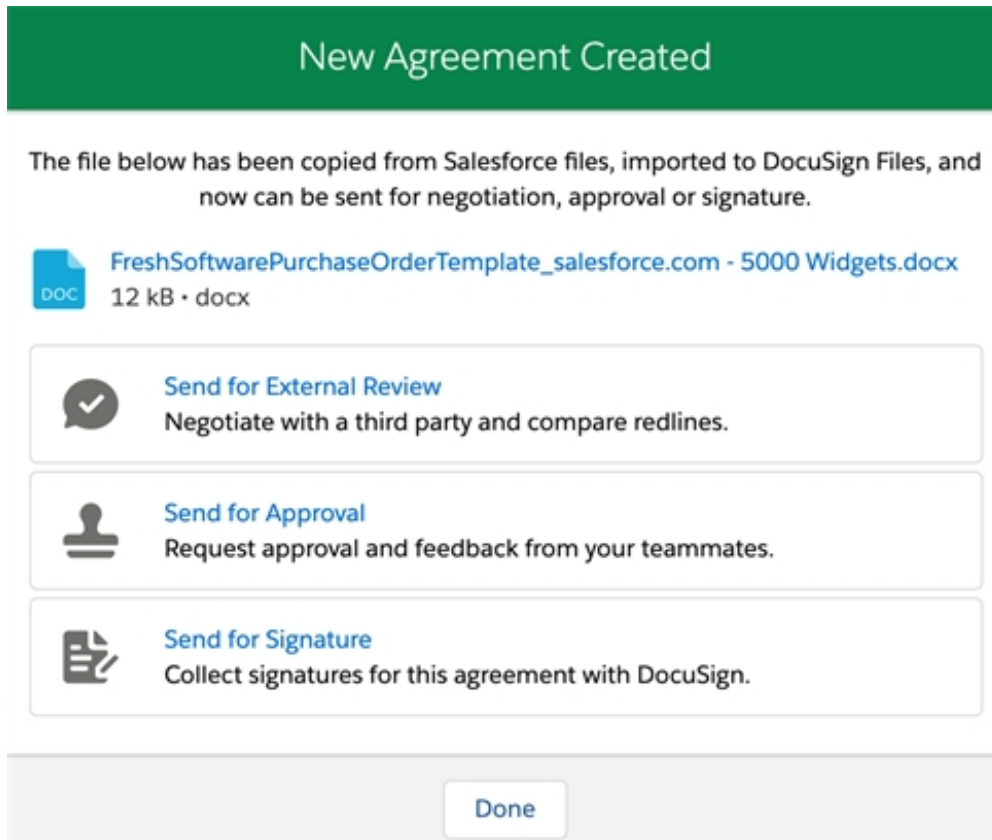
To send an agreement for review, internal users need to be added to the permissions for DocuSign Negotiate. See the Add Users article for more information.

Import a File for Negotiate

To create an agreement with DocuSign Negotiate, you must first import an existing Salesforce file or a file from your computer.

1. Log into Salesforce as a user with DocuSign Negotiate **Negotiator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the **Import** or **Create an Agreement** buttons in the DocuSign Files section of the page.

4. Pick either:

   a. **Choose from Salesforce Files**, to import an existing Salesforce document.

      - Check the box to the left of a single document from Salesforce. **Note**: Multiple document selection is not supported.

      - Click the **Import** button. The New Agreement Created pane opens.

   b. **Upload from PC** to add a file from your device.

      - Click the **Upload** button, or drag files from Windows Explorer or Finder.

      - Click the **Import** button. The New Agreement Created pane opens.

5. You are presented with three options: **Send for External Review**, **Send for Approval** and **Send for Signature**.

6. Select one of the options presented, or click the **Done** button to take no further action.

7. Refresh the browser tab and the file appears in the **DocuSign Files** section of the Salesforce record page.

This part of the process is complete. The imported file is now ready to be sent for External Review, Approval or Signature in the DocuSign Negotiate app.

Share Content

Imported content can be shared with anyone by using the Share Link function.

1. Log into Salesforce as a user with DocuSign Negotiate **Negotiator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the Share button [icon] to the right of any file in the DocuSign Files section.

4. Select **Share Link** from the dropdown menu. The Share Link pane opens.

5. Click the **Copy Link** button. The button displays a check mark with Link Copied! underneath.
   Note: Only users with permission to access your DocuSign Agreements can use this link to view, download and edit this agreement.

6. Click the **X** button above the upper-right of the Share Link pane.
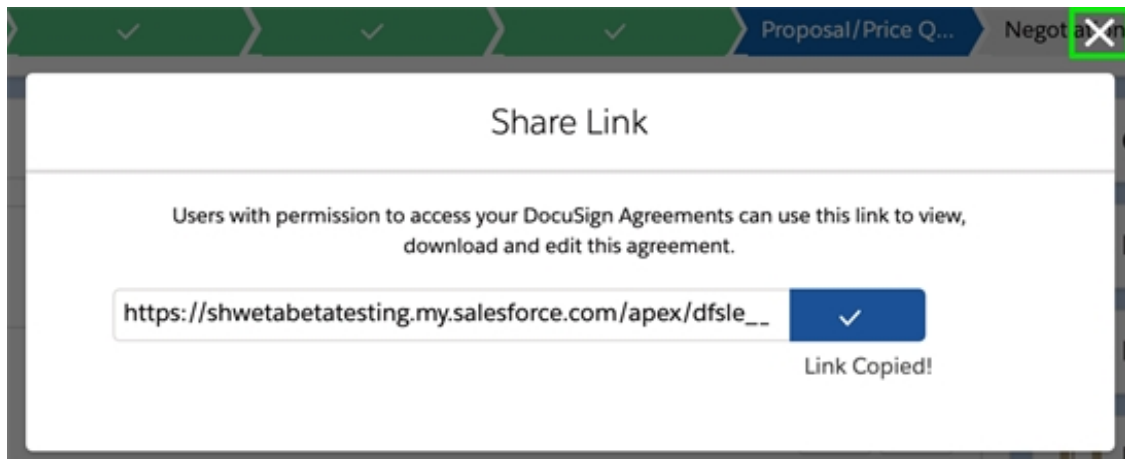
The process is complete. The copied link can be shared on any messaging platform. Users with permission to access your DocuSign Agreements can use this link to view, download and edit this agreement.

Send for External Review

After importing a file from Salesforce or your device to the DocuSign Files section of your Salesforce record, you are able to send to an external party for review through the External Review process.
Note: This functionality is only available in the Gen + Negotiate package, and is not available for Gen-only customers.

1. Log into Salesforce as a user with DocuSign Negotiate **Negotiator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the Share button [➤ ▾] to the right of any file in the DocuSign Files section.

4. Select **External Review** from the dropdown menu. The Select Reviewer pane opens.

5. Type the name or email address of an existing Salesforce contact in the **Add a Reviewer** field.

   Note: Only a user that is already set up in Salesforce as a Contact can be added. Typing in a non-contact address is not supported.

6. Click the **Set a Due Date** field and either type in a date or select one from the calendar.

   Note: If you type in a date, you may use (/) in the date format. So 1/1/2020 will work, but not 1-1-2020 or 1.1.2020
   1/1/2020 or **January 01, 2020** will resolve to the Negotiate standard date format of **Jan 1, 2020** when entered.

7. Click the **Next** button. The Personalize Your Message pane opens.

8. Accept the pre-filled **Subject** and **Message** text, or delete them and add your own.

9. Click the **Send** button. You are returned to the Salesforce record page. The file that was sent appears in the DocuSign Files section with a **Pending Review** status button below it.

10. Click the **Show Activity** link to the right of the file to see progress. Click the **Hide Activity** link to hide this information.

The process is complete. The file is sent to the Salesforce contact and you can track progress with the click of a button on the DocuSign Files section of that Salesforce record page.

Send for Approval

After importing a file from Salesforce or your device to the DocuSign Files section of your Salesforce record, you are able to send to an internal party for review through the Approval process.
Note: This functionality is only available in the Gen + Negotiate package, and is not available for Gen-only customers.

1. Log into Salesforce as a user with DocuSign Negotiate **Negotiator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the Share button [icon] to the right of any file in the DocuSign Files section.

4. Select **Internal Approval** from the dropdown menu. The Select Approvers pane opens.

5. Type the name or email of a Salesforce user from your organization in the **Add approvers** field.

   - Only Salesforce users with active **Negotiator** permissions in the org are allowed to be included here.

   - Users will not be able to participate until they have accepted their Negotiator permissions by authorizing the DocuSign Files page.

   - Salesforce users without Negotiator permissions, Salesforce Contacts, and external addresses can not be added.

6. **Optional**: Click the **+ Add Another Approver** button to add additional Salesforce users to the approval process.

   - Check the **Set Approval Order** box, if you want users to approve in a defined order.

- Click-and-drag the grid to the left of approvers up or down to switch the order.

Select Approvers

Choose from the Salesforce users in your organization.
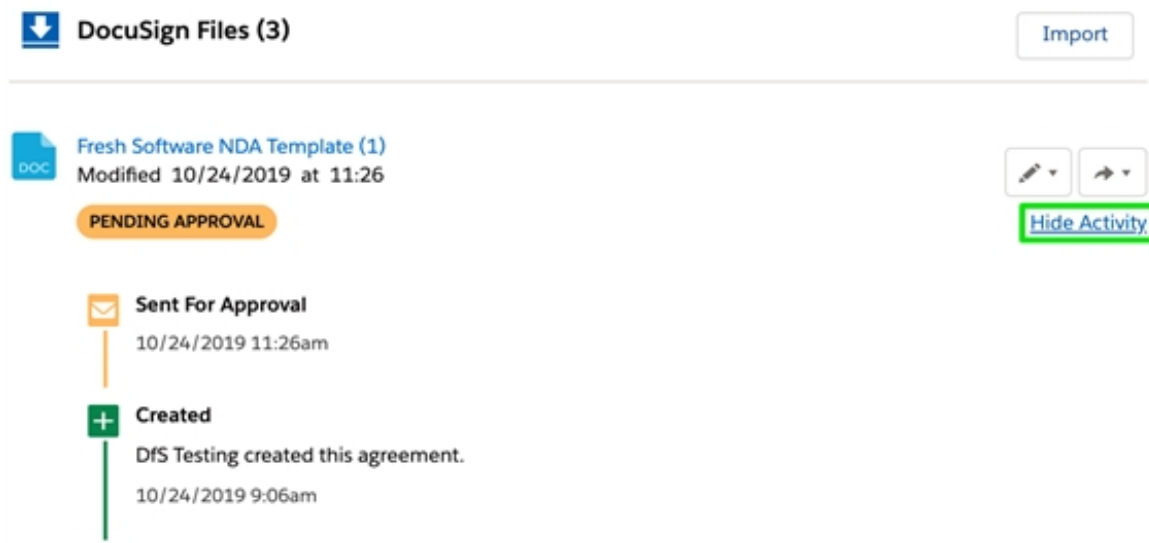
☑ Set Approval Order

* Add Approvers

| ⬆ ⠿ | 1 | 👤 betatesting debnewuser | ✕ | ✕ |
| ⬇ ⠿ | 2 | 👤 betatesting debnewuser | ✕ | ✕ |

➕ Add Another Approver

Back   Next

7. Click the **Next** button. The Personalize Your Message pane opens.

8. Accept the pre-filled **Subject** and **Message** text, or delete them and add your own.

9. Click the **Send** button. You are returned to the Salesforce record page. The file that was sent appears in the DocuSign Files section with a **Pending Approval** status button below it.

10. Click the **Show Activity** link to the right of the file to see progress. Click the **Hide Activity** link to hide this information.

The process is complete. The file is sent to the Salesforce user(s) and you can track progress with the click of a button on the DocuSign Files section of that Salesforce record page.

Send for Signature

After importing a file from Salesforce or your device to the DocuSign Files section of your Salesforce record, you are able to send to an external party for signature through the Send for Signature process.

Select File for Signature

Step one of the signature process involves selecting the content that will be tagged and sent to the recipients for signature.

1. Log into Salesforce as a user with DocuSign Negotiate **Negotiator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the Share button [icon] to the right of any file in the DocuSign Files section.

4. Select **Send for Signature** from the dropdown menu. The DocuSign Send Envelope page opens.

5. Check the box to the left of each document to be included in the envelope.
   Note: All files from the **Notes & Attachments** section of this Salesforce record will appear in the list of documents to add.

6. **Optional**: Click the **Upload Files** button or drop files from File Explorer or Finder to add additional documents from your device.

7. Click the **Next** button. The Recipients pane opens.

Step one of the Signature process is complete. You will now add recipients and recipient options to decide who receives the envelope and what actions they may take. See: Add Recipients and Options for Signature

Add Recipients and Options for Signature

Step two of the signature process involves adding recipients to the envelope and deciding what options are available to them in the signature process. Note that recipients can be Salesforce Users, Contacts or recipients from outside your Salesforce organization.

1. Click the **Add Recipient** button on the Recipients pane. The recipient fields load above.

2. Type the name of a Salesforce User or Contact from your org in the **Search by Name** field.

3. Set actions for each user in the dropdown menu to the right of the user field:

   - **Needs to Sign** (default): Recipient must review and sign.

   - **Receives a Copy**: Recipient cannot sign, but gets a copy of the document.

   - **Needs to View**: Recipient must review the document but not sign.

   - **Specify Recipients**: Recipient can specify other recipients.

   - **Allow to Edit**: Recipient may edit the document.

   - **Update Recipients**: Recipient may send updates to other recipients.

4. **Optional**: Click the **Access Authentication** button to the right of the action field.

   - Type a code in the **Access Code** field to add an extra layer of security. Recipient must enter code to open envelope.

   - Click the **Done** button. You are returned to the Recipients screen. The Access Authentication button has turned blue.

5. **Optional**: Click the **Private Message** button to the right of the Access Authentication button to send a message that only this recipient can see. The Private Message pane opens.

   - Type a private message in the **Message** field.

   - Click the **Done** button. You are returned to the Recipients screen. The Private Message button has turned blue

6. Click the **Next** button. The Email Message pane opens.
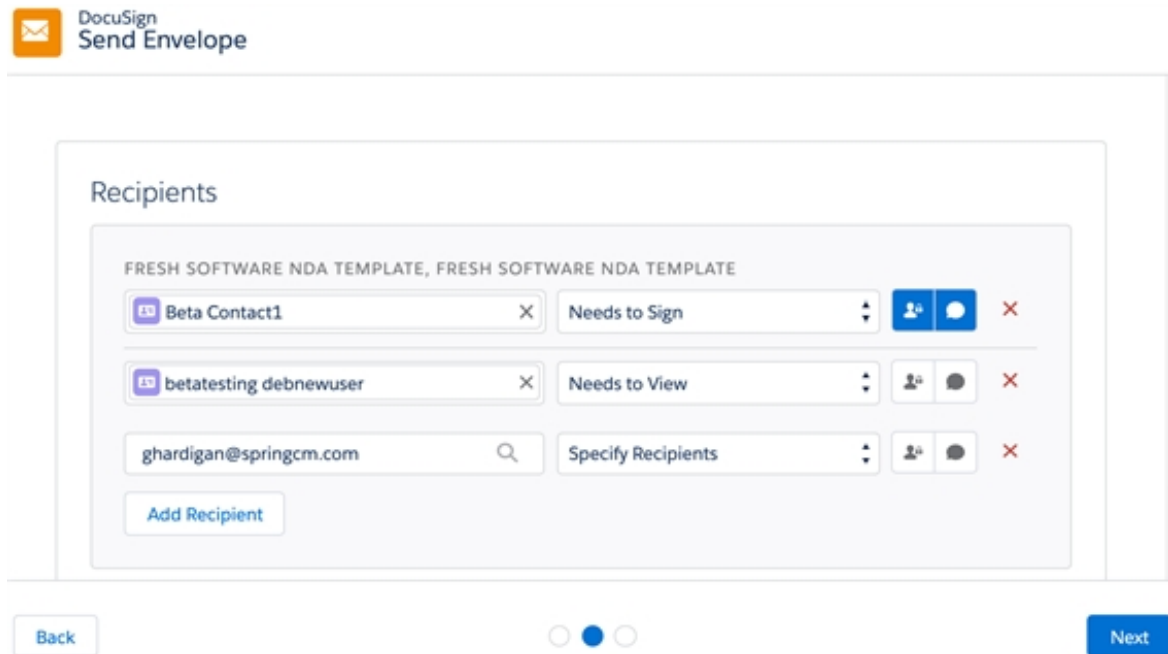
Step two of the signature process is complete. Recipients and recipient options are added to the envelope and you are ready to add a message and reminders. See: Add Message and Re

Add Message and Reminders to Signature

Step three of the signature process involves adding a subject, message and reminders to the envelope. This sets what recipients see when they open their DocuSign email and when they will be reminded to take action.

1. Accept the pre-filled **Subject** and **Message** text in the Email Message pane, or delete them and add your own.

2. Optional: Click the **Show** link to the right of the Advanced Options header.

    - **Reminders**: Set **days before sending first reminder** and **days between reminders** options.

- **Expiration**: Set days until envelope expires and **days in which to warn signers before expiration** options.

3. Click the **Continue and Tag** button in the lower-right. The eSignature tagging page opens.

Step three of the process is complete. A message and reminders to recipients have been set, and the envelope is ready to have DocuSign eSignature tags placed on it. See: Place eSignature I

Place eSignature Fields on your Document

Step four of the signature process involves placing the eSignature fields (or 'tags') on your document. These tags will create editable fields on the document, where recipients can add their signature, initials, a date, etc. When the document is returned to the sender, those fields will be locked and un-editable, creating a finished, legal contract.

1. Click a tag from the **Standard Fields** column at the left of the page and drag it to the desired place on the document.

2. **Optional**: Click the **Custom Fields** [icon] button below the Standard Fields button to create your own tags.

3. **Optional**: Click the **Seal Fields** button [icon] below the Custom Fields button to add a custom seal to the envelope.

4. **Optional**: Click the **Actions** button when all tags are placed, and select the following options:

   - **Save and Close**: Save your work, but do not send yet.

   - **Discard**: Discard all envelope configurations and close.

   - **Edit Message**: Change the Subject and Message you have set for the envelope.

   - **Edit Recipients**: Edit the list of recipients and the actions available to them.

   - **Edit Documents**: Remove or alter original document(s) from envelope, or add more documents from your device or the cloud.

- **Advanced Options**: Change recipient privileges and envelope reminders and expiration date.
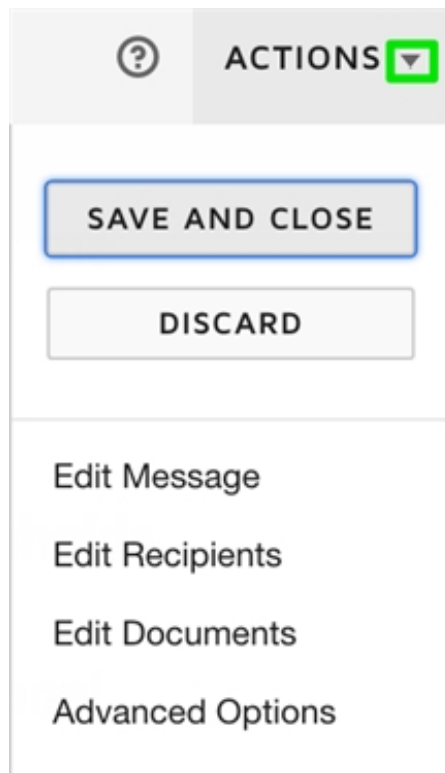
5. **Optional**: Click the **Rotate** or **Delete** buttons under the page thumbnails in the Documents column.

- **Rotate**: Turn the current page in increments of 90 degrees each time the button is clicked.
- **Delete**: Remove the selected page from the envelope.

- **Gear**: Remove or alter original document(s) from envelope, or add more documents from your device or the cloud.
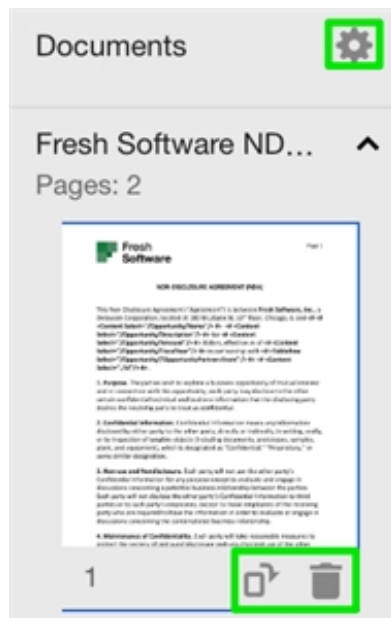
6. Optional: Click the arrow to the left of the recipient name in the column at the far-left of the page to customize the tags and options for each recipient.

- Click a different name from the list to create a new page layout for that recipient.

- Click the **Edit Recipients** button to add, remove or change options for existing envelope recipients.
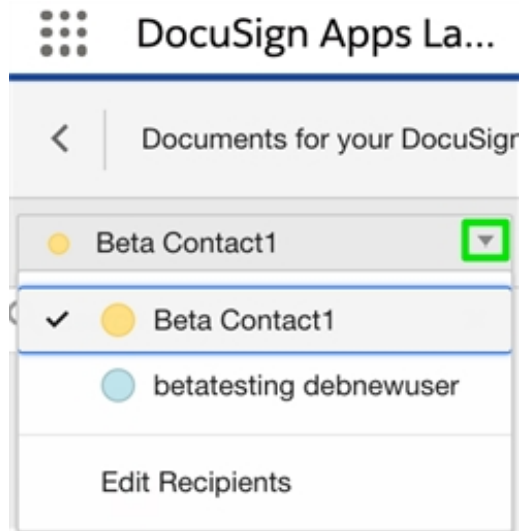
7. Optional: Click the **Recipients Preview** button in the upper-right of the page to see what the document will look like when the recipient receives it.

- Click the button for computer, tablet or smartphone to see what the document looks like in each form factor.

- Click the arrow ▼ to the right of the recipient name to preview as a different recipient.
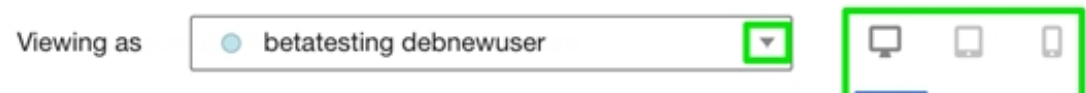
- Click the **X** in the upper-right of the page to close the recipient preview screen.

8. Click the **Send** button in the upper or lower-right of the page.

   Note: If you are missing fields for a recipient in the list, the **Missing fields for recipients** pane opens.

   Click the **Add Fields** button to add them or the **Send Without Fields** button to send the envelope without the missing tags.

   A banner announces: **Successfully sent**.

The process is complete. The signature is sent to the recipients and the file is updated in the DocuSign Files section of the Salesforce record page.

Receiving Internal Approvals From Negotiate

If you are a user receiving an Internal Approval request from a DocuSign Negotiate for Salesforce user, you can approve, reject, add comments or (admins only) make changes and upload new versions of the document.

1. Open the email titled **Document for your approval**.

2. Click the **Review** button in the email body. The document preview opens in a new browser tab.

3. Choose one of the following:

    a. **View the document** in the preview pane.

    b. **Download the document** to view a copy on your device

        - Click the **Edit** button ✎▾ in the upper-right of the page.

        - Select **Download** from the dropdown menu.
          Note: Only Administrators are able to edit and upload a new version of the document.

4. Select the **Approve** or **Reject** radio button in the left-hand pane.

5. **Optional**: Add comments in the **Comments** box.

6. Click the **Send Response** button.

*Your Response
● Approve
○ Reject

Comments

Looks Good!

Send Response

The page refreshes and a banner reads: **Response for approval submitted successfully**.

You receive an email notifying you that your part of the approval is complete.

The process is complete. Your input has been sent to the Internal Approval sender.

Receiving External Reviews From Negotiate

If you are a user receiving an External Review request from a colleague in your Salesforce org, there are a number of actions you can take to approve or make changes.

1. Open the email titled **Document sent for Review**.

2. Click the **Review & Edit Document** button in the email body. The document preview opens in a new browser tab.

3. Click the **Got It** button after reading the How to Complete Your Review pane that opens.

4. Click the download arrow to the right of the document name, or review it in your browser.

Review

Instructions

To begin, download the document(s) or review in the browser. When you are done reviewing, continue to the next step.

1 Document for Review

Fresh Software NDA Templat...

5. Click the **Next** button.

6. If downloaded, review the document and make and save any necessary changes.

7. Choose one of these options:

   a. **If you did not edit the document**:

      - Click the **Skip** button.

b. **If you edited the document**:

- Click the **Select File** button and navigate to the updated document on your device.

  Optional: Drag and drop the document from File Explorer or Finder.

  The **Updated Document(s)** header appears at the bottom of the left-hand pane, displaying your updated document.

- Click the **Next** button.

Upload New Version

Drag and Drop

or

SELECT FILE

Updated Document(s)

Fresh Software NDA Template Ac... ✕

BACK   NEXT
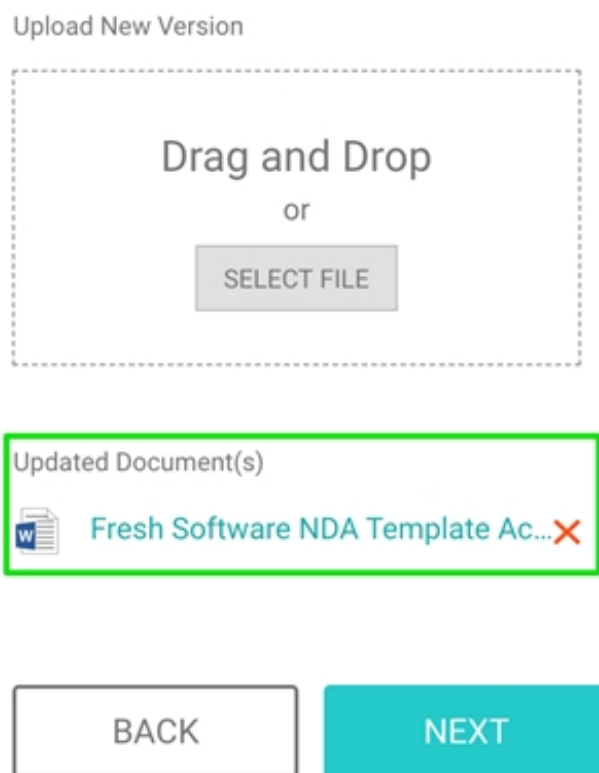
8. Optional: Add comments in the **Comments** box.

9. Click the **Finish** button.

10. Click the **Complete** button on the Are you sure you're ready to complete this review? pane.

   Optional: Click the **Cancel** button to continue editing.

The page refreshes and a banner reads: **Thanks! Your feedback has been submitted to (sender name)**.

You receive an email notifying you that your part of the review is complete.

The process is complete. Any changes and comments you made have been sent to the External Review sender.

Compare Document Versions

Documents that have multiple versions saved in DocuSign Files can be compared to see what changes have been made. Two versions of the document are selected and merged and the changes are shown in red. You can compare the current document with its most recent version (default), or with an even earlier version.

Compare with Most Recent Version

The Compare With feature automatically loads the two most recent versions of a document for comparison. To view changes between the current document and its most recent version, follow these steps.

1. Log into Salesforce as a user with DocuSign Negotiate **Negotiator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the name of a file.
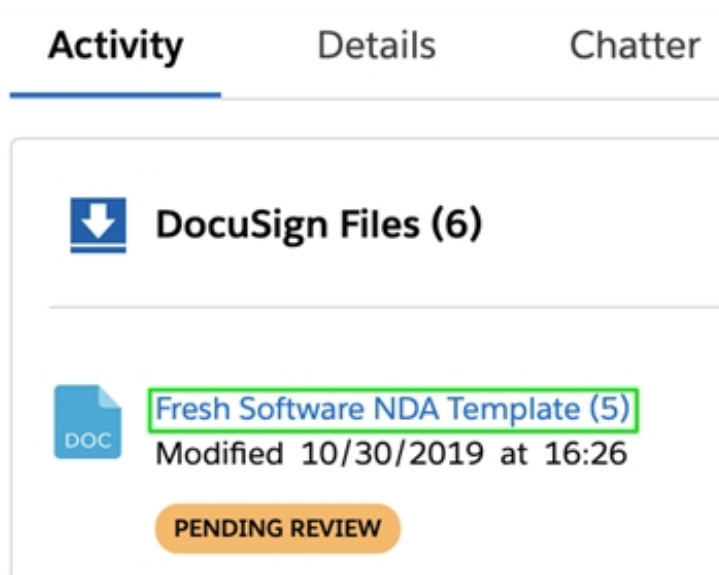
4. Check the **Compare with** box to compare the current document with the previous version.
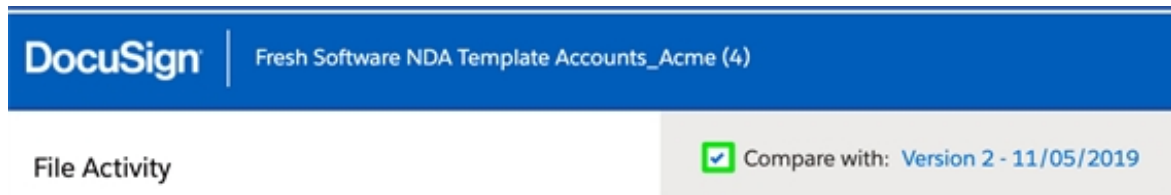

5. The screen refreshes, then displays a merged copy of the two versions, with red lines displaying text that has been changed, added or deleted.

6. Take additional actions from the Edit button [pencil icon] or the Share button [share icon] , or click the **Back** button to return to the record page.

The process is complete. You have viewed the changes between the two most recent versions of the document.

Compare with Earlier Versions

The Compare With feature automatically loads the most recent version of a document for comparison. To compare with any of its earlier versions, follow these steps.
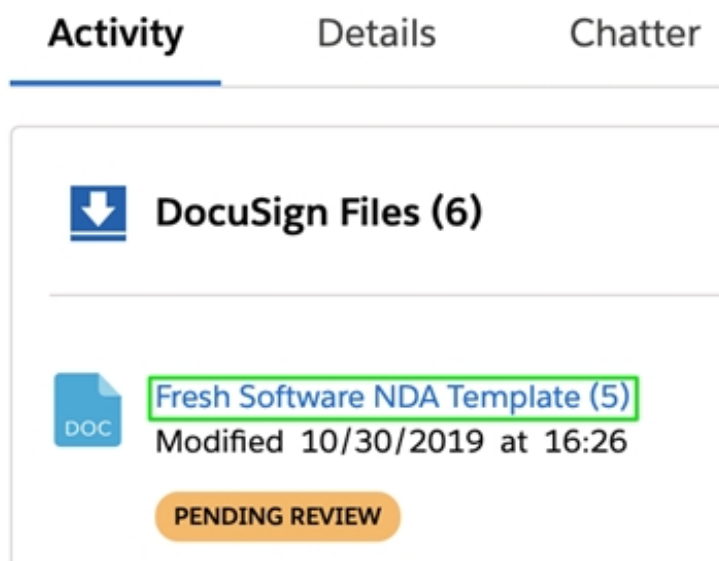
1. Log into Salesforce as a user with DocuSign Negotiate **Negotiator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the name of a file.

4. Click the **Version** link to the right of the Compare with box to compare the current document any earlier version. The Compare Versions pane opens.
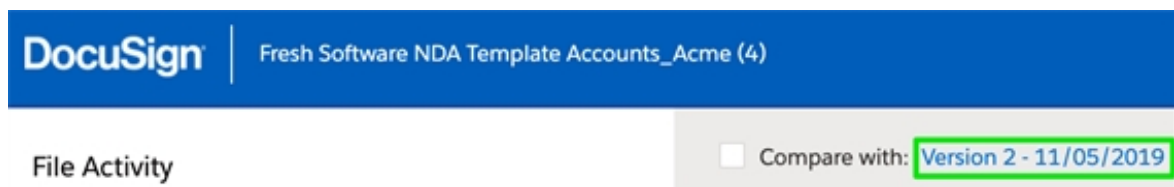
   Note: If the **Version** text is not clickable, then there is only one earlier version of the document, which is compared by checking the **Compare with** box.

5. Click the radio button to the left of the desired version number.

6. Click the **Compare** button.

Compare Versions

Current Document

Fresh Software NDA Template Accounts_Acme (4).docx (Current)

Compare to:
Select any version of the current document in the list below

	Document Version	Modified By	Modified Date
○	Version 2	dfs_neg_beta@dsxtr.com	11/05/2019 12:39am
◉	Version 1	dfs_neg_beta@dsxtr.com	11/05/2019 12:39am

Cancel   Compare

7. The screen refreshes, then displays a merged copy of the two versions, with red lines displaying text that has been changed, added or deleted.

8. Take additional actions from the Edit button [✏ ▾] or the Share button [➔ ▾], or

click the **Back** button to return to the record page.

The process is complete. You have viewed the changes between the current document and any of its earlier versions.

Negotiate Internal Approval Additional Actions

Documents that have been sent for internal approval can have additional actions taken before the approval process is complete.

Cancel Internal Approval

The internal approval process can be canceled before completion.

1. Log into Salesforce as a user with DocuSign Negotiate **Negotiator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the name of a file.
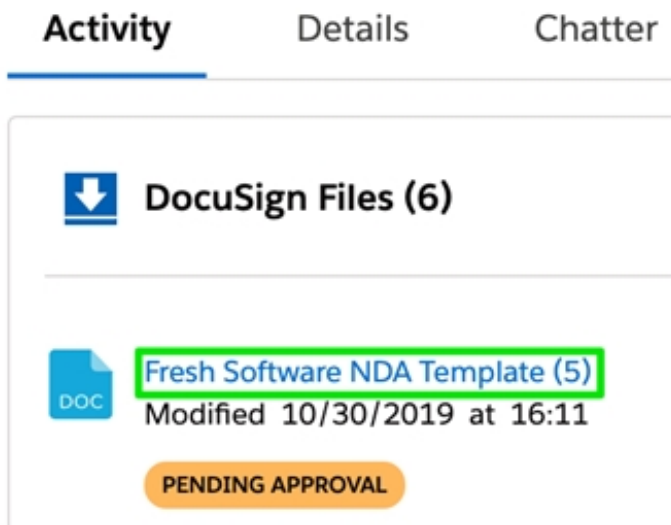
4. Click the **Cancel** button in the upper-left of the page. The Cancel Approval pane opens.

5. Click the **Cancel Approval** button.
   A banner notifies: **Approval canceled for (document name)**.

6. Take one of the following actions:

   - Click the **Back** button in the upper-right of the page to return to the Salesforce record page.

   - Click the Edit button to download, rename, delete, etc.

   - Click the Share button to share or send for review, approval or signature.

- Click the **Compare with** checkbox to see any changes that exist between the two selected versions.
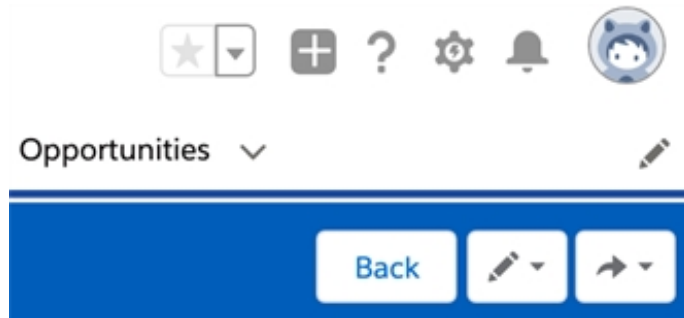
The process is complete. The approval is canceled and the internal approvers to whom the link was sent can no longer take action on the document. The file shows an **Approval Canceled** button under it in the Salesforce Files section of the record page.

Resend for Approval

If an approver needs a request resent for any reason, you can use the Resend Request function.

1. Log into Salesforce as a user with DocuSign Negotiate **Negotiator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the name of a file.

4. Click the **Resend Request** button in the upper-left of the page.

5. Click the **Resend Request** button.

   A banner notifies: **(document name) resent for internal approval**.

6. Take one of the following actions:

   - Click the **Back** button in the upper-right of the page to return to the Salesforce record page.

   - Click the Edit button to download, rename, delete, etc.

   - Click the Share button to share or send for review, approval or signature.

   - Click the **Compare with** checkbox to see any changes that exist between the two selected versions.
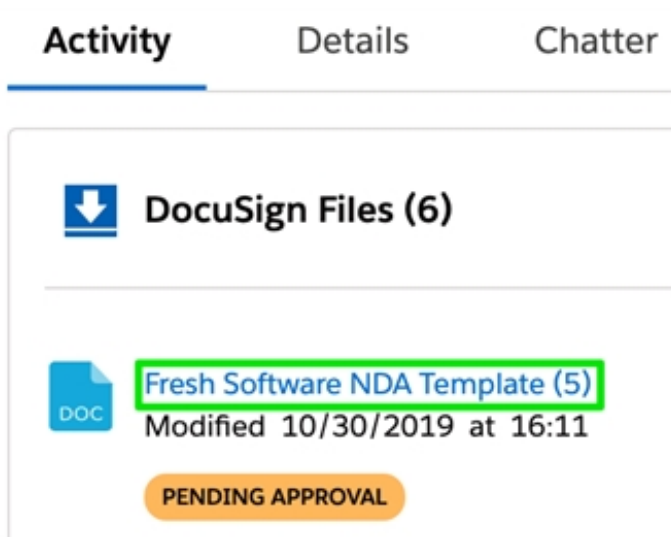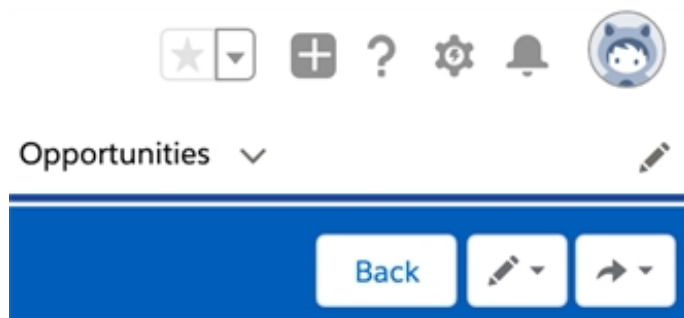
The process is complete. The approval has been resent to the internal approvers to whom the link was sent. The file shows a **Pending Approval** button under it in the Sales-force Files section of the record page.

Complete Request on Behalf of an Internal Approver

If an approver is unable to approve a request, you can use the Complete For function. **Note: You must be either the sender of the document or the DocuSign admin-istrator to complete a request on behalf of a user.**

1. Log into Salesforce as a user with DocuSign Negotiate **Negotiator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the name of a file.
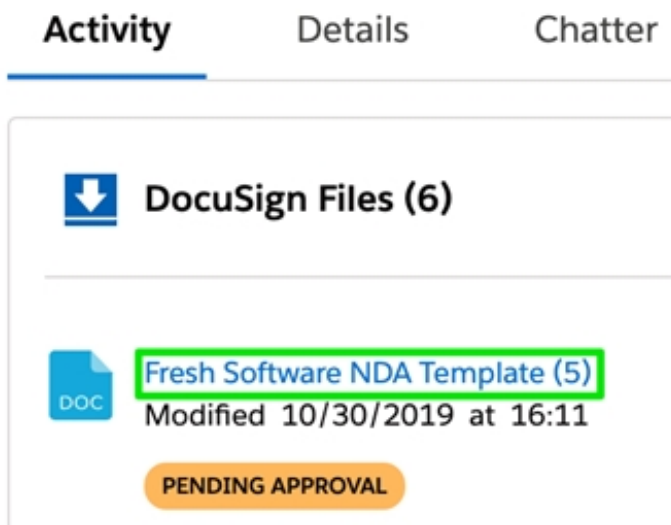
4. Click the **Complete For** button in the upper-left of the page. The Complete Approval pane opens.

5. Select the approver from the **Complete Approval For** dropdown list.

6. Select the **Approve** or **Reject** radio button under the Your Response header.

7. **Optional**: Add comments under the **Comments** header.

8. Click the **Submit** button.

Complete Approval

Complete Approval For

unified newuser2

*Your Response
● Approve
○ Reject

Comments

I'm approving for you. Get better soon!

Cancel   Submit

A banner notifies: **Response for approval submitted successfully**.

9. Take one of the following actions:

    ● Click the **Back** button in the upper-right of the page to return to the Sales-
       force record page.

    ● Click the Edit button to download, rename, delete, etc.

    ● Click the Share button to share or send for review, approval or signature.

- Click the **Compare with** checkbox to see any changes that exist between the two selected versions.
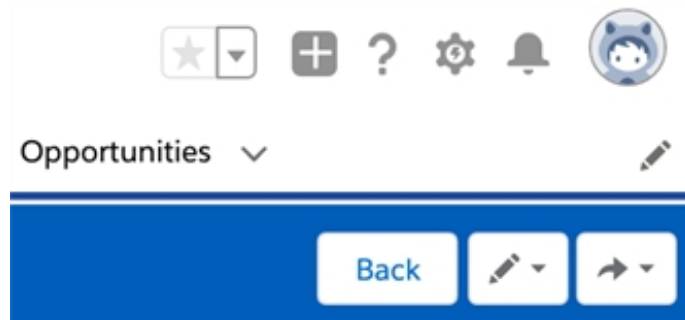
The process is complete. You have completed the approval on behalf of the selected recipient. The file shows an **Approved** button under it in the Salesforce Files section of the record page.

Negotiate External Review Additional Actions

Documents that have been sent for external review can have additional actions taken before the review process is complete.

Cancel External Review

The external review process can be canceled before completion.

1. Log into Salesforce as a user with DocuSign Negotiate **Negotiator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the name of a file.
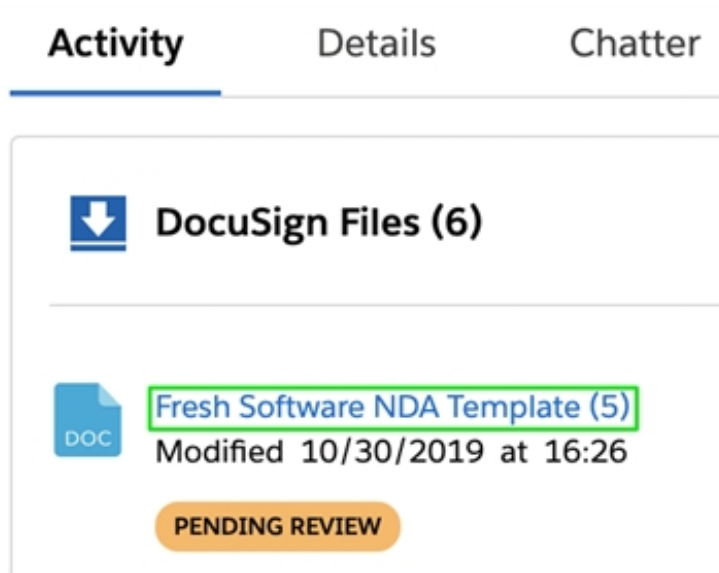
4. Click the **Stop** button in the upper-left of the page. The Stop Review pane opens.

5. Click the **Stop Review** button.

   A banner notifies: **Review canceled for (document name)**.

6. Take one of the following actions:

   - Click the **Back** button in the upper-right of the page to return to the Salesforce record page.

   - Click the Edit button to download, rename, delete, etc.

   - Click the Share button to share or send for review, approval or signature.

- Click the **Compare with** checkbox to see any changes that exist between the two selected versions.

The process is complete. The external review is canceled and the external reviewers to whom the link was sent can no longer take action on the document. The file shows a **Review Canceled** button under it in the Salesforce Files section of the record page.

Resend for Review

If an external reviewer needs a request resent for any reason, you can use the Resend Request function.
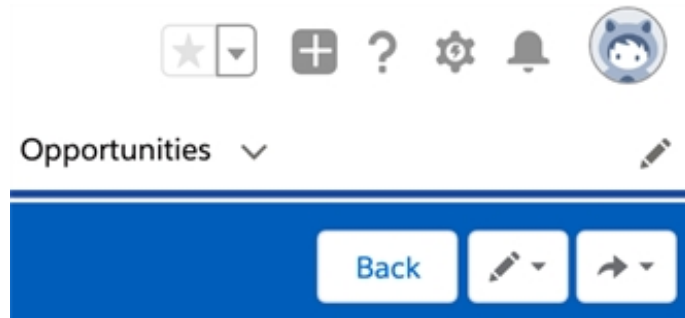
1. Log into Salesforce as a user with DocuSign Negotiate **Negotiator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the name of a file.

4. Click the **Resend Request** button in the upper-left of the page

   A banner notifies: **(document name) resent for external review**.

5. Take one of the following actions:

   - Click the **Back** button in the upper-right of the page to return to the Salesforce record page.

   - Click the Edit button to download, rename, delete, etc.

   - Click the Share button to share or send for review, approval or signature.

   - Click the **Compare with** checkbox to see any changes that exist between the two selected versions.
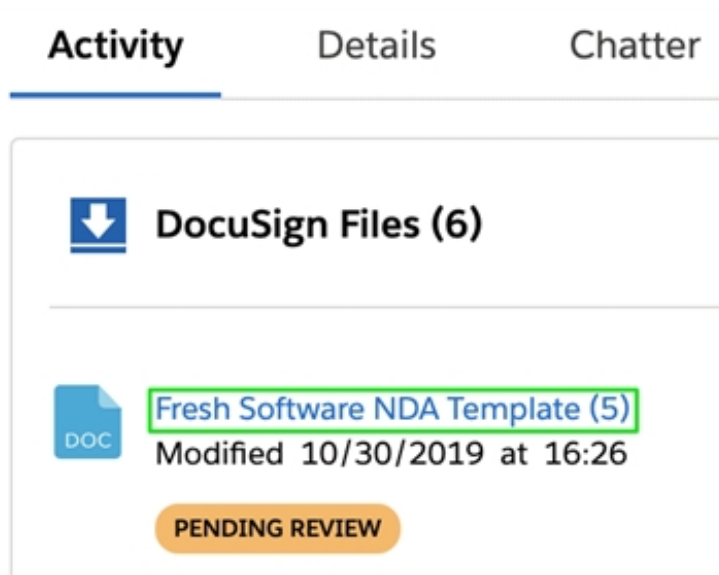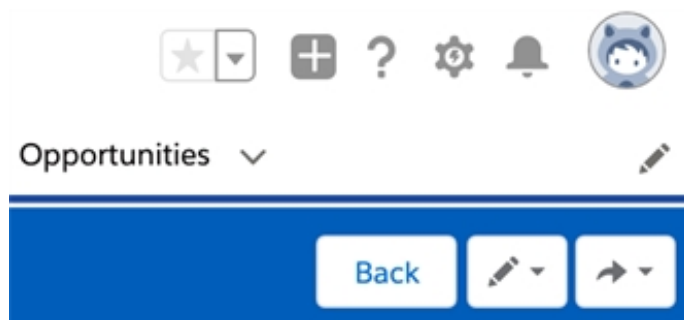
The process is complete. The approval has been resent to the external reviewers to whom the link was sent. The file shows a **Pending Review** button under it in the Salesforce Files section of the record page.

Complete Request on Behalf of an External Reviewer

If an external reviewer is unable to approve a request, you can use the Complete For function.
Note: You must be either the sender of the document or the DocuSign administrator to approve on behalf of a user.

1. Log into Salesforce as a user with DocuSign Negotiate **Negotiator** permissions.

2. Open a Salesforce record (Account, Opportunity, etc.)

3. Click the name of a file.
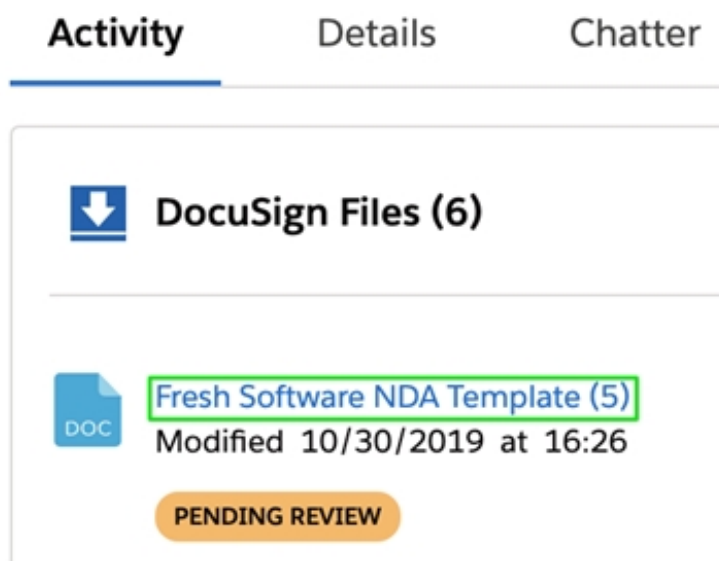
4. Click the **Complete For** button in the upper-left of the page. The Complete Review For pane opens.

5. Click the **Upload** button, or drag the new version of the document from File Explorer or Finder.

6. **Optional**: Add comments under the **Comments** header.

7. Click the **Complete** button.

Complete Review for

New Version

DOC Fresh Software NDA Template.docx
      29.56 KB · docx   ✕

Comments

Here's the latest!

                                                          Cancel   Complete

A banner notifies: **External review on behalf of completed**.

8. Take one of the following actions:

   - Click the **Back** button in the upper-right of the page to return to the Salesforce record page.

   - Click the Edit button to download, rename, delete, etc.

   - Click the Share button to share or send for review, approval or signature.

- Click the **Compare with** checkbox to see any changes that exist between the two selected versions.
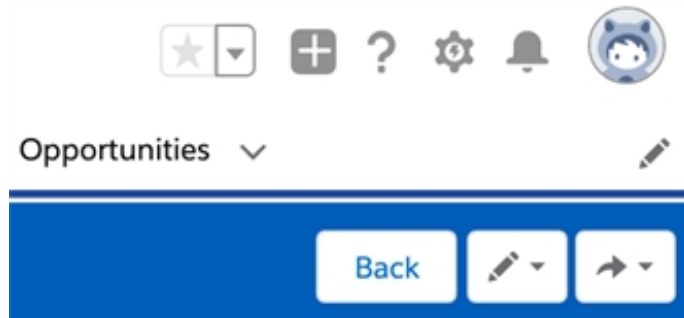

The process is complete. You have completed the external review on behalf of the recipient. The file shows an **Approved** button under it in the Salesforce Files section of the record page.

DocuSign Negotiate User FAQs

Q: I am trying to send a contract for Internal Approval from my DocuSign Files section in Salesforce. Why is the recipient I am trying to add not populating when I type in their name or email address?

A: Possibilities:

- The Internal Approval recipient is not a user in your Salesforce organization. Approvals cannot be sent to contacts or people outside of your Salesfore org.

- The recipient is a user in your Salesforce org, but has not been added to your list of Negotiators.

- The recipient is a Salesforce user, has been added as a Negotiator, but has not yet activated their DocuSign Negotiate account.

Q: I am trying to send a contract for External Review from my DocuSign Files section in Salesforce. Why is the recipient I am trying to add not populating when I type in their name or email address?

A: Possibilities:

- The recipient has not been added as a contact in your Salesforce org. Only Salesforce contacts can be added as external review recipients.

- The recipient is a contact, but their name or address has been mistyped. Check Setup -> Contacts to verify correct information.

Q: I am a user with "Active" Generator status. Why can't I build or edit a Gen template?

A: Only DocuSign Gen users with Administrator status can add or edit Gen templates. Talk to your administrator.

Q: I downloaded a file from DocuSign Files, made changes to the file name. When I uploaded it as a new version, why didn't the file name update in DocuSign Files?

A: Versioning does not result in a document name change. To rename the file in DocuSign Files, use the [Rename feature from the Edit menu](#).

Q: A teammate is on vacation, and the External Review they sent needs to be completed. I have access to the file in DocuSign Files, so why am I unable to use the Complete For or Stop functions?

A: The Complete For and Stop functions are only available for a DocuSign administrator, or the original sender of the review. No other users can complete or stop a review on behalf of the sender.

Glossary

Anchor text A literal character string indicated by the user to perform an action on or

replace with another specified data or data input.

Bulk document creation A configuration with multiple template documents associated with it that generates all documents at once when used.

Data fields Specific information, such as quantities, characters, or symbols, stored in electronic or digital format, relating to a record of a specific type.

Data source The location from where data being used or merged comes.

DocuSign Gen users Users who will have access to a DocuSign Gen account as users or administrators.

DocuSign fields Elements designed by DocuSign that your recipients can use to sign or
enter in specific data when you send a document for signature. Optionally, DocuSign fields can also be used to update data in Salesforce when the information is changed by a signer. Examples: Signature, Signature date, Title.

Importing merge fields Selecting merge fields from your existing templates, such as DocuSign, to include in template configurations.

Main data source The Salesforce object from which the document generation action initiates. For example, if you choose Opportunity to be your main data source, you'll be able to pull any data from that object as well as from related objects, such as Account or Opportunity Line Items.