

**DocuSign®**

**DocuSign® Gen**

# User Guide

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# DocuSign Gen for Salesforce Overview (User)

DocuSign Gen 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 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.

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 accuracy. 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:

- Activating your Gen account
- Creating contracts with Gen
- Importing and Editing 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.

**ACTIVATE YOUR ACCOUNT**

Thanks for signing up for a DocuSign Account. Fill out the fields below and click ACTIVATE to get started.

EMAIL  
you@yourorg.com

PASSWORD  
.....

CONFIRM PASSWORD  
.....

SECURITY QUESTION  
What is the name of your manager at your first job? ▼  
Monsieur Manager

**ACTIVATE**

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 layouts. 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 Salesforce 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 importing 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 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.


## New Agreement Created

The file below has been copied from Salesforce files, imported to DocuSign Files, and now can be sent for negotiation, approval or signature.




FreshSoftwarePurchaseOrderTemplate\_salesforce.com - 5000 Widgets.docx

12 kB • docx




[Send for External Review](#)

Negotiate with a third party and compare redlines.



[Send for Approval](#)

Request approval and feedback from your teammates.



[Send for Signature](#)

Collect signatures for this agreement with DocuSign.


Done

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  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  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	




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.


 **DocuSign Files (4)**

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 **Fresh Software NDA Template (1) (1)**  
Modified 10/24/2019 at 16:59  

NEW VERSION Hide Activity


>  **Uploaded a New Version** 10/24/2019 4:59pm  
DfS Testing uploaded a new version of this agreement.

 **Created** 10/24/2019 4:59pm  
DfS Testing created this agreement.

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.

Rename Agreement

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\* Agreement Name

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.

 **DocuSign Files (4)**

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 **Fresh Software NDA Template**  
Modified 10/24/2019 at 17:26  


NEW [Hide Activity](#)

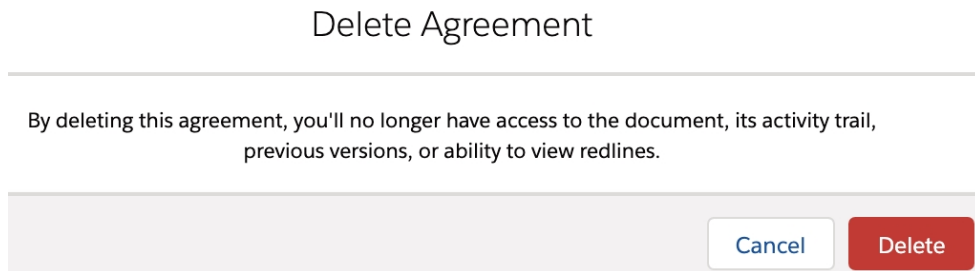
>  **Renamed** 10/24/2019 5:26pm  
DfS Testing renamed this agreement.

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.



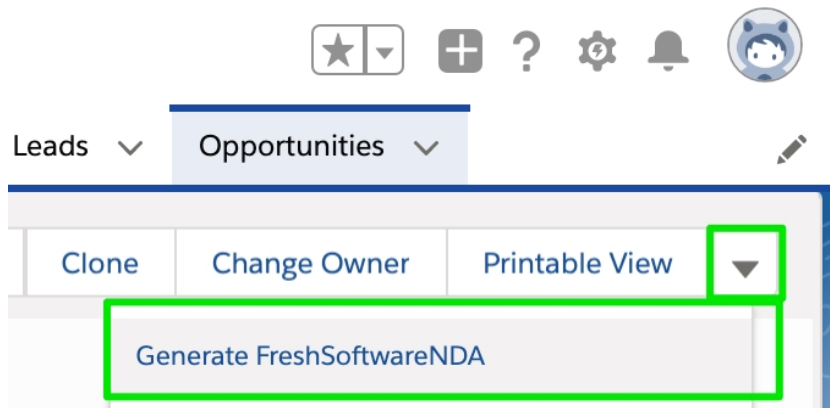
A banner announces: **(document name) has been deleted**. You are returned to the Salesforce record page. The file is no longer in the DocuSign Files section.

The process is complete. The content has been deleted.

## Generate Contracts with DocuSign Gen

DocuSign Gen is a powerful tool that allows users to generate contracts with the click of a button. Gen templates pull Salesforce fields directly into your contract, without having to navigate away from Salesforce.

1. Log into Salesforce as a user with DocuSign Gen **Generator** permissions.
2. Open a Salesforce record (Account, Opportunity, etc.)
3. Click the custom Gen button your administrator has placed on the page layout.  
**Note:** The button will be in the upper-right; either visible on the button bar, or hidden under the arrow directory. It will always have the word "Generate" before the title.




4. Click one of these options:
  - a. **Preview:** Opens the document preview page in another tab. The document preview shows what the recipient will see when the contract is sent to them.
  - b. **Download:** Downloads a copy of the contract to your device.
  - c. **Send for Signature:** Initiates the eSignature process.
  - d. **Send for Review:** (Only available for Negotiate customers) Gives the option to send for internal approval or external review.



✓ New Documents Generated

The files below have been successfully generated and can now be sent for signature

✓  Fresh Software NDA Template\_salesforce.com - 5000 Widgets  
29.76 kB · docx  
[Preview](#) or [Download](#)

Back

Send for Signature

Send for Review ▼

The generated contract is added to both the DocuSign Files and Salesforce Notes & Attachments sections of the Salesforce record page.

The process is complete. You have Generated a new contract using the Salesforce fields from the record page you visited, and have taken further action to move it through the contract completion process.

## DocuSign Gen User FAQs

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

A: You are not a DocuSign administrator in your Salesforce org. Only DocuSign Gen users with Administrator status can add or edit Gen templates.

Q: Other colleagues are able to send documents created in Gen for external review or internal approval. Why am I not seeing these options?

A: Your user has Gen access, but not Negotiate access. DocuSign Gen and DocuSign Negotiate are two separate products with separate permissions. Your administrator can add Negotiator status for you, and then those functions will be available.

Q: Why does a Gen custom button appear on our Opportunity page layouts, but not on Accounts?

A: Your administrator decides which page layouts get custom buttons, and can add the Gen button to additional page layouts.



# 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.