

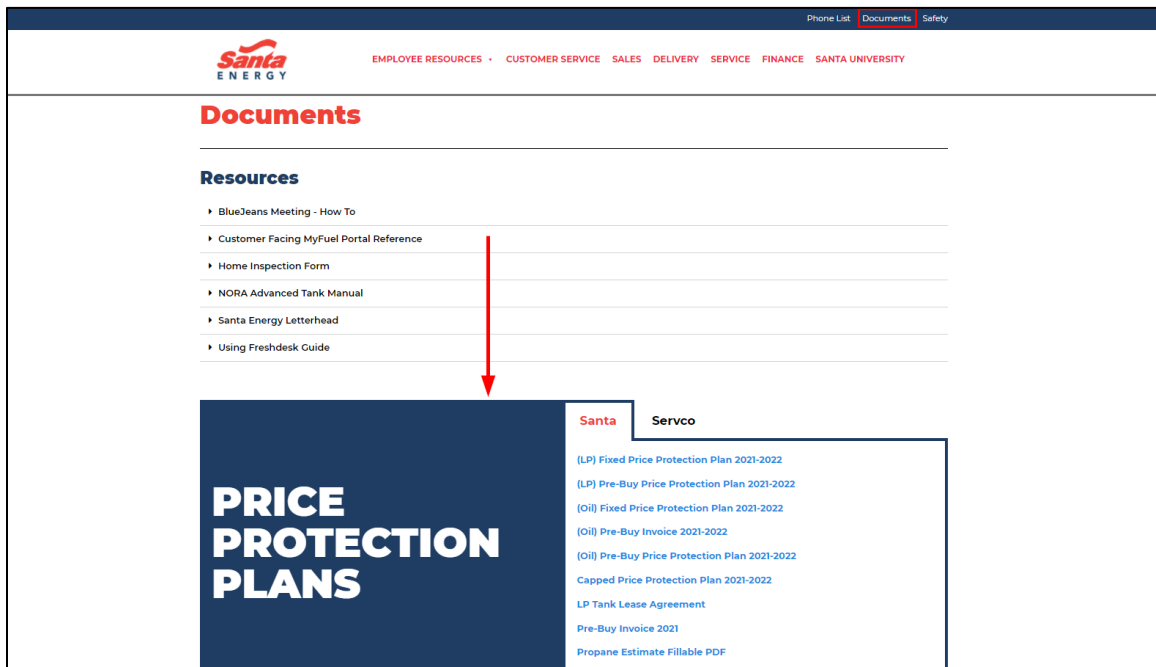
Abstract

This document will go through the steps needed to send a Price Protection Plan to a customer through DocuSign.

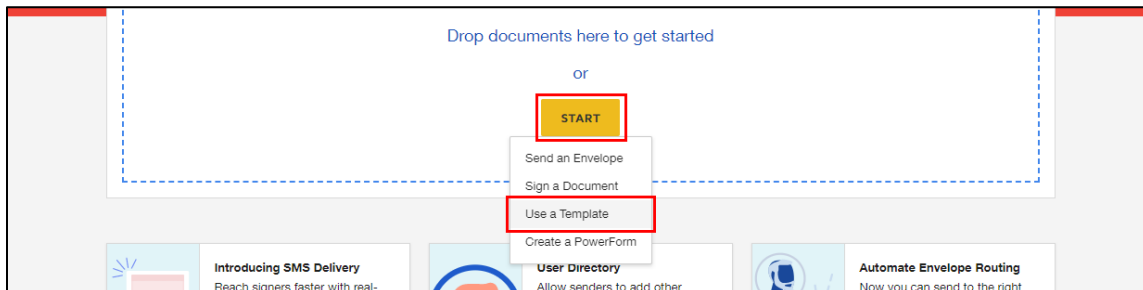
Procedure

To send a customer a price protection plan, you first fill out a fillable PDF of the plan then send to the customer through DocuSign. This way, the customer can choose not to sign it if something is incorrect. Then we can upload a corrected PDF and still have them sign without VOIDING an envelope.

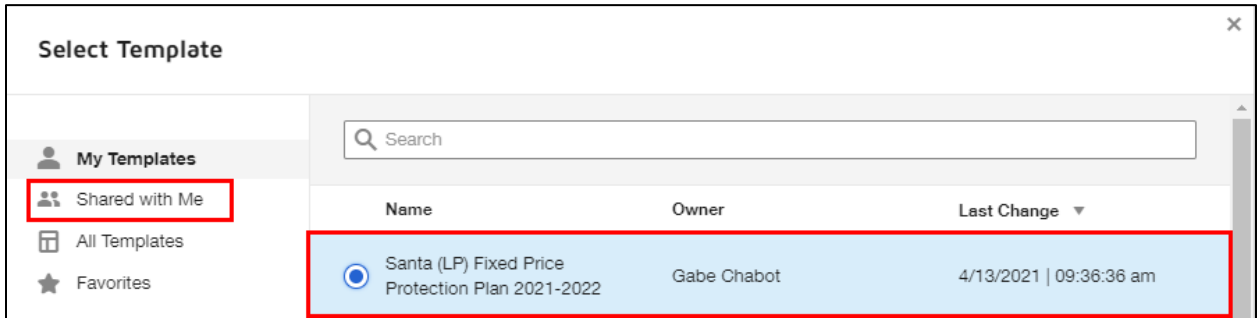
1. On Santa Central, under Documents, all of the Price Protection Plans are available. Open the document you need and fill it out, then save it somewhere accessible on your computer.



1. Next, log into DocuSign. Select the yellow **Start** button and choose **Use a Template** from the home page.



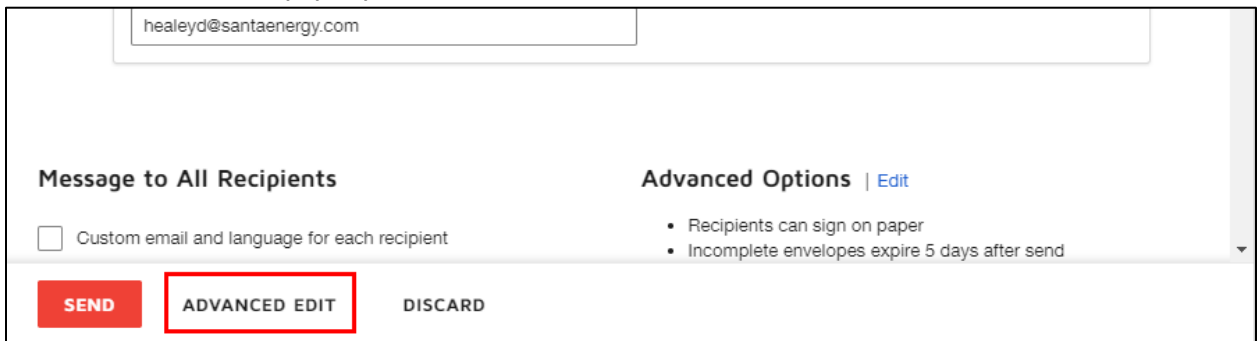
2. Choose the template under “**Shared with Me**” that matches the plan you are sending out:



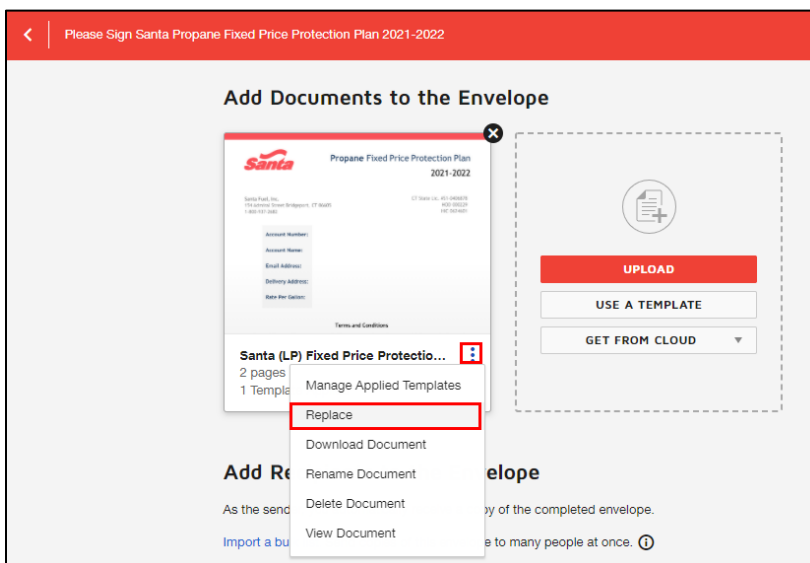
3. Select the Price Protection Plan you will be sending by clicking the circle next to the name, then click **Add Selected**.



4. When the next window pops up, at the bottom, select **ADVANCED EDIT**.



5. Click the 3 dots next to the document and then choose **REPLACE**:



- Then choose to upload the PDF you had previously filled out for the customer. After uploading the document, fill in the customer's name and email address in the "Customer" spot:

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[Import a bulk list](#). Send copies of this envelope to many people at once. ⓘ

Set signing order

1 **Customer** NEEDS TO SIGN ▼ CUSTOMIZE ▼

Name *

Email *

- At the bottom of the pop up window, you have the option to edit the **Email Message** if you'd like to personalize it in any way. Otherwise, select **SEND**.

Message to All Recipients

Custom email and language for each recipient

Email Subject *

Please Review and Sign Your Price Protection Plan

Characters remaining: 51

Email Message

If you have any questions, please call 203-367-3661.

Characters remaining: 9948

SEND ADVANCED EDIT DISCARD

Advanced Options | [Edit](#)

- Recipients can sign on paper
- Incomplete envelopes expire 7 days after send date
- Recipients are warned 2 day(s) before request expires
- Senders can use either quick send or advanced edit

- The document will then be sent to the customer for them to initial, at the bottom, finalizing the price protection plan. From the **Manage** tab in DocuSign, you can see the status of the document sent.

DocuSign eSignature Home **Manage** Templates Reports Settings

NEW

Shared Envelopes

ENVELOPES

Inbox Sent Drafts

Inbox

Filtered by: Date (Last 6 Months) | [Edit](#)

Search Inbox and Folders FILTERS

Subject	Status	Last Change
<input type="checkbox"/> Please Review and Sign Your Price Protection Plan To: Gabe Chabot, Venore Alabre +2 more	Waiting for Others	1/19/2021 01:22:55 pm

Looking for more? | [Edit your filters](#)

RESEND ▼