

DocuSign

Version: 7.30.21

ID: SF-012

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.

	Phone List Documents Safe						Safety	
Santa ENERGY	EMPLOYEE RESOURCES +	CUSTOMER SERVICE	SALES	DELIVERY	SERVICE	FINANCE	SANTA UNIVERSITY	
Documents								
Resources								
BlueJeans Meeting - How To								
Customer Facing MyFuel Port	al Reference							
Home Inspection Form								
NORA Advanced Tank Manual								
Santa Energy Letterhead								
Using Freshdesk Guide								
	•							
		Sant	ta	Servco				
		(LP) Fi	ixed Price	e Protectio	n Plan 2021	-2022		
DDIGE		(LP) PI	re-Buy P					
PRICE			(Oil) Fixed Price Protection Plan 2021-2022					
PROTE	CTION	(Oil) P	(Oil) Pre-Buy Invoice 2021-2022					
			(Oil) Pre-Buy Price Protection Plan 2021-2022 Capped Price Protection Plan 2021-2022					
PLANS		LP Tank Lease Agreement						
			uy Invoic					
		Propa	Propane Estimate Fillable PDF					

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



The information in this standard is subject to change and may be updated frequently. If you are looking at a print copy, make sure you are viewing the latest version of the standard.



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

Select Template			×
My Templates	Q, Search		
Shared with Me	Name	Owner	Last Change 🔻
 All Templates Favorites 	Santa (LP) Fixed Price Protection Plan 2021-2022	Gabe Chabot	4/13/2021 09:36:36 am

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

ADD SELECTED

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

	healeyd@santaenergy.com		
Messag	e to All Recipients	Advanced Options Edit	
Cust	om email and language for each recipient	 Recipients can sign on paper Incomplete envelopes expire 5 days after send 	+

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

Proper Field Price Protection Print Set rest With With With With With With With With			8		
Image: Applied Templates 1 Templa Manage Applied Templates Replace Download Document	Santa				
UPLOAD UPLOAD USE A TEMPLATE GET FROM CLOUD * 2 pages 1 Temple Manage Applied Templates Replace Download Document	154 Admiral Street Bridgeport	* IT MARS HOD 00029			
Manage Applied Templates Replace Download Document					
Santa (LP) Fixed Price Protectio				UPLOAD	
Santa (LP) Fixed Price Protectio	Rate Per Gallan:		USE	A TEMPLATE	
2 pages 1 Temple Replace Download Document	Santa (LP)		GET F	ROM CLOUD	Ŧ
Download Document	2 pages				
		Replace			
Add Re Rename Document elope		Download Document			
	Add Re	Rename Document	elope		
	Import a bu	View Document	e to many people at onc		

The information in this standard is subject to change and may be updated frequently. If you are looking at a print copy, make sure you are viewing the latest version of the standard.



Γ

6. 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 Reci	dd Recipients to the Envelope									
As the sender,	the sender, you automatically receive a copy of the completed envelope.									
Import a bulk li	st. Send copies of this envelope to many people at once. ()									
Set signing	g order									
1	Customer	🖋 NEEDS TO SIGN 🔻	CUSTOMIZE 🔻							
	Name *									
	8									
	Email *									

7. 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	Advanced Options Edit
Custom email and language for each recipient	Recipients can sign on paper Incomplete envelopes expire 7 days after send date
Email Subject*	Recipients are warned 2 day(s) before request expires
Please Review and Sign Your Price Protection Plan	 Senders can use either quick send or advanced edit
Characters remaining: 51	
Email Message If you have any questions, please call 203-367-3661.	
Characters remaining: 9948	
SEND ADVANCED EDIT DISCARD	

8. 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 eSigna	ture	Home	Manage	Templates	Reports	Settings		0	Santa	Santa
NEW	Inbox Filtered by	r: Date (Last (6 Months) Edit				Q Search Inbox an	d Folders	+	E FILTERS
Shared Envelopes	Tittered by		o monthay Edit							
ENVELOPES		Subject				Stat	tus	Last Change 🔻		
inbox	□ 0		view and Sign You Dhabot, Venore Alab	r Price Protection F ore +2 more	Plan	Wai	iting for Others	1/19/2021 01:22:55 pm	RESE	ND T
Sent Drafts	Looking for more? Edit your filters									