



User Guide

DocuSign Enhancements:

Send, Change, Resend, and Void

User Guide for DocuSign Enhancements

Send, Change, Resend, and Void

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Select either Generate Contract or Sign with DocuSign. Generate contract will only download a PDF. Sign with DocuSign will prompt the signee information to be entered. Please note, you can only select ONE option on this current page, not both. If you only “Generate the Contract”. You will be able to Resend the DocuSign from the Pricing Quotes Dashboard shown in step 4.

The screenshot shows a web interface with a left-hand navigation menu containing three tabs: 'General', 'Billing', and 'Confirmation'. The 'Confirmation' tab is selected. The main content area is titled 'Confirmation' and contains the following text: 'Dear Taylor, Thank you for using CableFinder. Before generating the contract, please make sure that you populate all the required fields with valid information. You can edit this information by going back to one of the previous tabs. Once you are sure that everything is correct please click on the Generate Contract Button.' At the bottom of the page, there are three buttons: 'PREVIOUS' on the left, 'GENERATE CONTRACT' in the center, and 'SIGN WITH DOCUSIGN' on the right.

2

If selecting Send with DocuSign from the confirmation page, enter in the signee information.

The screenshot shows a form titled 'Signee Contact Information'. Below the title is a instruction: 'Please enter the full name and email address of the person that will sign the contract.' The form contains three input fields: 'Signee Name', 'Title', and 'Signee E-mail Address'. Below these fields is a checkbox labeled 'Would you like to send a copy?'. At the bottom right of the form are two buttons: 'OK' and 'Close'.

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For additional DocuSign actions, go to the Searches and Quotes Menu, then Pricing Quotes History Dashboard.

The screenshot shows the CableFinder web application interface. At the top, there is a navigation bar with the CableFinder logo and several menu items: Serviceability, Data Management, Manual Request, Upload Contract, Searches And Quotes, and Settings. The 'Searches And Quotes' menu is open, displaying a dropdown list with the following options: New Multi-Site Search, Multi-Site Search History, Multi-Site Search Admin Dashboard, Pricing Quotes History (highlighted with a red circle), Pricing Quotes Admin Dashboard, and Search History. Below the navigation bar, the main content area displays a 'Confirmation' message. The message is addressed to 'Dear Taylor,' and thanks the user for using CableFinder. It instructs the user to ensure all information is valid before generating a contract and provides a 'PREVIOUS' button. At the bottom right of the confirmation message, there are two buttons: 'GENERATE CONTRACT' and 'SIGN WITH DOCUSIGN'.

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If you did not “Send with DocuSign” from the confirmation page, you have the option to send from the dashboard.

Test Comcast	Test	Comcast	Coax Internet	Mar 17, 2025, 5:19:24 PM		Download Quote Price Quote Download Unsigned Contract Upload Signed Contract Update Master CRM Quote ID Send With DocuSign
Test Spectrum	Test	Spectrum	Fiber	Mar 17, 2025, 3:26:36 PM	completed	Download Quote Price Quote Download Unsigned Contract Upload Signed Contract Update Master CRM Quote ID
Test Lumen		Lumen	Fiber	Mar 14, 2025, 9:52:08 AM		Download Quote Price Quote Upload Signed Contract Update Master CRM Quote ID
Test Lumen	Test	Lumen	Fiber	Mar 14, 2025, 9:52:03 AM		Download Quote Price Quote Upload Signed Contract Update Master CRM Quote ID

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Enter Signee Information

Please enter the full name and email address of the person that will sign the contract.

Signee Name

Title

Signee E-mail Address

Would you like to send a copy?

OK CLOSE

Actions

- Download Quote
- Price Quote
- Download Unsigned Contract
- Upload Signed Contract
- Update Master CRM Quote ID
- Send With DocuSign

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You'll receive a confirmation Document Sent Successfully. You'll also receive a copy to your email.

Document Sent Successfully

Thank you for submitting your request. An email message has been sent with the contract that needs to be signed.

CLOSE

Customer Name Quote Name Provider Selected Se Master CR

DocuSign Order Status Actions

- Download Quote
- Price Quote

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The DocuSign Status will show as “sent”.

ableFinder Serviceability Data Management Manual Request Upload Contract Searches And Quotes Settings

VIEW FILE

Customer Name	Quote Name	Provider	Selected Services	Master CRM Quote ID	Date/Time	DocuSign Status	Order Status	Actions
Customer N	Quote Na	Provider	Selected Se	Master CR				Download Quote Price Quote Download Unsigned Contract Upload Signed Contract Update Master CRM Quote ID Void Document Resend Document Change Document Signer
Test Comcast	Test	Comcast	Coax Internet		Mar 17, 2025, 5:19:24 PM	sent		Download Quote Price Quote Download Unsigned Contract Upload Signed Contract Update Master CRM Quote ID Void Document Resend Document Change Document Signer

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Once the Signee opens the document (but does not yet sign), the status will show “delivered”.

Customer Name	Quote Name	Provider	Selected Services	Master CRM Quote ID	Date/Time	DocuSign Status	Order Status	Actions
Customer N	Quote Na	Provider	Selected Se	Master CR				Download Quote Price Quote Download Unsigned Contract Upload Signed Contract Update Master CRM Quote ID Void Document Resend Document Change Document Signer
Test Comcast	Test	Comcast	Coax Internet		Mar 17, 2025, 5:19:24 PM	delivered		Download Quote Price Quote Download Unsigned Contract Upload Signed Contract Update Master CRM Quote ID Void Document Resend Document Change Document Signer
Test Spectrum	Test	Spectrum	Fiber		Mar 17, 2025, 3:26:36 PM	completed		Download Quote Price Quote Download Unsigned Contract Upload Signed Contract Update Master CRM Quote ID
Test Lumen		Lumen	Fiber		Mar 14, 2025, 9:52:08 AM			Download Quote Price Quote Upload Signed Contract Update Master CRM Quote ID

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Once the DocuSign is signed, the status will show “completed”. You will also receive a copy of the signed DocuSign in your email associated with your CableFinder account.

Spectrum	Fiber		Mar 17, 2025, 3:26:36 PM	completed	Download Quote Price Quote Download Unsigned Contract Upload Signed Contract Update Master CRM Quote ID
Lumen	Fiber		Mar 14, 2025, 9:52:08 AM		Download Quote Price Quote Upload Signed Contract Update Master CRM Quote ID
Lumen	Fiber		Mar 14, 2025, 9:52:03 AM		Download Quote Price Quote Upload Signed Contract Update Master CRM Quote ID

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After the initial DocuSign is sent, users will have the option to “Void Document, Resend Document, or Change Document Signer”.

Test Comcast	Test	Comcast	Coax Internet	Mar 17, 2025, 5:19:24 PM	delivered	Download Quote Price Quote Download Unsigned Contract Upload Signed Contract Update Master CRM Quote ID Void Document Resend Document Change Document Signer
Test Spectrum	Test	Spectrum	Fiber	Mar 17, 2025, 3:26:36 PM	completed	Download Quote Price Quote Download Unsigned Contract Upload Signed Contract Update Master CRM Quote ID

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Change Signer Prompt

The screenshot shows a 'Change Signer' modal dialog box. The background is a table with columns: Customer Name, Quote Name, Provider, Selected, Master CRM, Date/Time, DocuSign, Order, and Actions. The modal has a title 'Change Signer' and a section 'New signer information'. It contains two text input fields: 'Name' and 'Email'. At the bottom right of the modal are two buttons: 'CLOSE' and 'CONFIRM'.

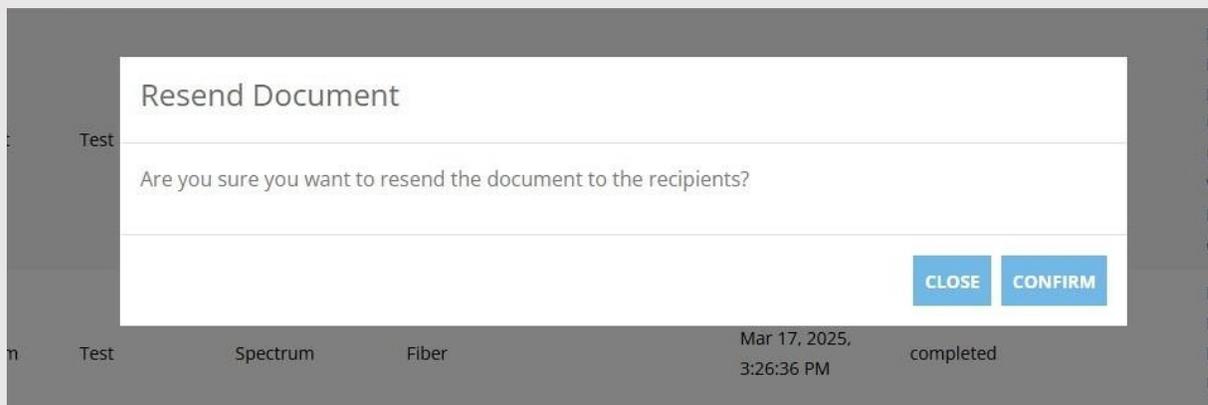
Customer Name	Quote Name	Provider	Selected	Master CRM	Date/Time	DocuSign	Order	Actions
Customer N	Qu							Download Quote Price Quote Download Unsig Upload Signed C Update Master C Void Document Resend Docume Change Docume
Comcast	Test							Download Quote Price Quote Download Unsig Upload Signed C Update Master C
Spectrum	Test							Download Quote Price Quote Download Unsig Upload Signed C Update Master C
Lumen		Lumen	Fiber		Mar 14, 2025			Download Quote Price Quote

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Resend Document Prompt



The dialog box is titled "Resend Document". It contains the question "Are you sure you want to resend the document to the recipients?". At the bottom right, there are two buttons: "CLOSE" and "CONFIRM".

Test

Resend Document

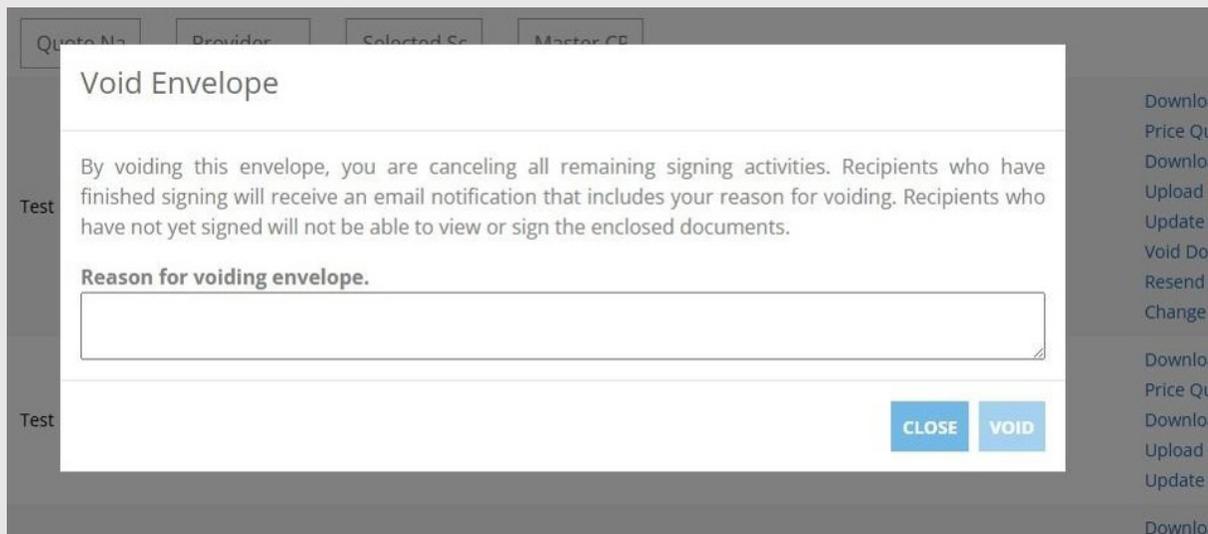
Are you sure you want to resend the document to the recipients?

CLOSE CONFIRM

n Test Spectrum Fiber Mar 17, 2025, 3:26:36 PM completed

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Void DocuSign Prompt. Please provide a reason.



The dialog box is titled "Void Envelope". It contains the text: "By voiding this envelope, you are canceling all remaining signing activities. Recipients who have finished signing will receive an email notification that includes your reason for voiding. Recipients who have not yet signed will not be able to view or sign the enclosed documents." Below this text is a text input field labeled "Reason for voiding envelope.". At the bottom right, there are two buttons: "CLOSE" and "VOID".

Quote No. Provider Selected Se. Master CE

Test

Void Envelope

By voiding this envelope, you are canceling all remaining signing activities. Recipients who have finished signing will receive an email notification that includes your reason for voiding. Recipients who have not yet signed will not be able to view or sign the enclosed documents.

Reason for voiding envelope.

Test

CLOSE VOID

Download Price QU Download Upload S Update f Void Doc Resend f Change l Download Price QU Download Upload S Update f Download