Isle of Arran Distillers

The Isle of Arran Distillers makes Scotch whisky. They are offering their clients the ability to purchase entire casks of their delicious, and nutritious, whisky through their salespeople. They want to find a way to put the ordering process into DocuSign, but the workflow is pretty complex and they aren’t sure its possible.

First, the Salesperson creates the Offer Sheet and Order Form based upon their conversation with the client. Before the customer receives the order form, the Sales Manager needs to approve a Checklist to confirm the Offer Sheet and Order Form contain the proper information and the Salesperson has followed the process. Once the Sales Manager approves, the Checklist and Offer Sheet need to go the the Sales Director for final approval before going to the customer. They want to send both the Checklist and Offer Sheet to the Manager and Director for approval on both documents, but they don’t want the Customer to see the checklist.

Due to the taxes, duties, and other legal ramifications of selling casks of whisky, Isle of Arran needs to have the customer initial next to certain areas of the Offer Sheet to ensure they have looked at each area. Because each Offer Sheet is slightly different, these areas can move around on the document. The Isle of Arran heard of this magical thing in DocuSign called “Anchors” used in conjunction with white text. They have already entered white text onto the Offer Sheet using the unique string, /ic/, and want to test the anchor functionality in their template.

Finally, Accouting needs to be CC’d so they can process payment.

Your job is to see if you can place this workflow into DocuSign!