CPQ Exercise Guide – Half Page CCO

Create a CCO half page ad for a Clipp local book

GOAL: Create a quote for a half page ad in a local book.

TASKS:

1. Create & Configure Quote.
2. Submit for Approval.
3. Collect Agreement Approval E-signatures.
4. Send Payment Request.

TIME:

From the Salesforce training environment: https://valpak--sftrain2.sandbox.lightning.force.com/

Step 1 - Create Quote

- Select the **Accounts** tab.

- Select an account name from the *Recently Viewed* list.

- Note the account name selection.

- Select the **Quick Quote** button.

*Account Used for Scenario 1:*_____

Step 2 – Choose a Product

From the pull down menu, choose a product and click CREATE

You can also choose
I WILL CHOOSE LATER

If you choose your product here skip to step 4

Create a quote and opportunity by choosing a product and related fields. Select Create to begin quote creation or Cancel to return to the account. Select the 'I will Choose Later' option to create a quote without a product. Further modifications can be made at the next screen.

Product

Select Product ⓘ

Cancel | Create

✓ Clipper On Page [CL-ONPAGE]
Clipper Off Page [CL-OFFPAGE]
Clipper LDP Postcard [CL-LDPP]
Clipper Digital [CL-DIGITAL]
Solo Postcards [Wrapper_SOLO]
I will Choose Later

Step 3 - Select Add Products

Step 4 - Choose the Product

- Click on Clipper On Page and click SELECT

Step 5 - Configure Products

- From the list of products, choose CL-HHP (half page).
- *Notice the wrench icon next to the product you selected. If you wish to add layout preferences, click on the wrench. When you are finished DO NOT HIT SAVE YET.*

Step 6 - Configure CCO

- Click on the other options tab and check the CL-CCODEAL box
- Notice the wrench icon next to the CL-CCODEAL check box. Click on that wrench to configure your CCO *Deal*

Step 7 - Configure CCO

- Click on the CCO Deal Options and select your deal. If it is a custom deal select custom and fill in the CCO Deal Price & CCO Deal Value with the correct amounts.
- Once you have chosen the correct information hit the Save button and Save again on the next screen.

Step 8 - Distribution

- FIRST, select the **Quick Save** button to save the selections you've made up to this point.
- Now that your product has been chosen, click Distribution
- *Notice that the page on LocalFlavor.com (Clipp.com)
  has already been selected along with the half page ad and the CCO Deal is on line 4.*

Step 9 - Distribution

- Click the Star
- *Note Distribution amounts will change to the book quantity once the areas are chosen*

Step 10 - Market Search

- Search for your market. Type in the beginning of your state or market and the choices will appear.
- You can also type in CLIPPER and all the Clipp markets will be listed.

Step 11 – Choose the local book

- Select the local book, quick save and Save

Step 12 –

- Review and **Quick Save**

Step 13 - Review CCO Quantity

- Notice the CCO Quantity is listed as 85 (varies per distribution) and that there is no rate card price.
- Click Save and return to the quote.

Step 14 – Go back to the account page to set CCO location

- Go back to the main account page for this quote

- Click on the tab that says location

- (Quick hint: if the address on this account is the CCO location then scroll down on main page and copy the Location address)

Step 15 – Creating CCO Location

- Select Create New Location

- Enter in the information for the CCO location business

- Hit Create Location for Account

Account Locations

Location Title
Harding Street Location

Location Status
Active

Address
5025 ha

Address
5025 Harding Pike

City   State/Province
Nashville   TN

Zip/Postal Code   Country
37205   United States

Phone
555-555-5555

WebSite (Valid http:// or https:// format Required)
https://www.robertssubshop.com

Location Hours
M-F 10am - 7pm

Description

Previous   **Create Location for Account**

Step 16 – Create CCO Deal

- Go Back to the Support tab and Click on the Support Tab

- Choose Data

- Use the drop down box, select CCO Request and hit next

Account
Robert's Sub Shop

+ Follow   New Task   Laur

Type	VPO Status	Phone	Category	Account Ext ID	Total Balance Due
Prospect		(555) 555-5555	Dining / Food / Beverage [2]		USD 0.00

Contacts (1)   Cases (0)   Opportunities (3)   Quotes (3)   Contracts (0)   Files (0)   Chargent Orders (2)   Transactio

VPO Orders (Print Accou...   VPO Orders (Digital Acc...   Orders (0)   Invoices (0)

Show All (24)

We found no potential duplicates of this Account.

Details   **Support**   Billing Dates   Statement   AR   Sales   Locations   Feed

Quick Case Create

*Category
○ Operations
○ Billing
○ Artwork
◉ Data

*Type
--None--

--None--
List Request
Research Request
Call Tracking Request
CCO Request

Next

7

Step 17 = CCO Deal Instructions

- Fill in the information for you deal and hit next

- On the next screen upload any files or images needed and hit next

- The next screen will say "Successfully Created New Request

Step 18 – Return to the account screen and Click on Data Requests

Step 19 – Copy the data request number next to the CCO you wish to use

Accounts > Robert's Sub Shop
Data Requests
2 items • Updated 3 minutes ago

		Data Request Name ∨	Franchise Name ∨	Data Reques... ∨	Record Type
1	☐	DR00017966	Valpak of Kings County	New	CCO Request
2	☐	DR00017969	Valpak of Kings County	New	CCO Request

Step 20 – Return to your CCO quote

- Scroll down on the quote page to the Ad/Data Requests Assignments

- Pick your first CCO line (example is line 4)

- Hit the edit pencil on the Data Request line

- Paste in the number of you CCO Data request here

Ad/Data Request Assignm...   Account Ad Requests   Account Data Requests   Locations

◈ **Ad/Data Requests Assignment(6)**

🔍 Search Phrase

		N.. ∨	Effective ...	Product Display ∨	Ad Reques... ∨	Case ... ∨	Data Requ... ∨	Data ... ∨	
1	☐	2	08/26/2024	-Half Page [CL-HHP]					▾
2	☐	4	08/26/2024	-CCO Deal [CL-CCODEAL]			DR00017966	DR00017966	▾
3	☐	6	09/30/2024	-Half Page [CL-HHP]					▾
4	☐	8	09/30/2024	-CCO Deal [CL-CCODEAL]					▾
5	☐	10	11/25/2024	-Half Page [CL-HHP]					▾
6	☐	12	11/25/2024	-CCO Deal [CL-CCODEAL]					▾

Step 21 Assign location to your CCO

- Click on the locations tab here

- Click on the check box to assign the location to this quote and click save

Ad/Data Request Assignment	Account Ad Requests	Account Data Requests	**Locations**

Quote Line

CCO Deal ▼

Inactive Locations ⬤
Exclude

☑ Location Based Deal ⓘ

| ☐	**Location Name** ⌄	**Address Street** ⌄	**Address City** ⌄	**Add...** ⌄	**Address Zip** ⌄	**Status** ⌄
☑	CCO Deal	5025 Harding Pike	Nashville	TN	37205	Active

💾 Save

Step 22 - Submit for Approval

- Select the **Submit for Approval** button.

Step 23 - Generate Document

- Select the **Generate Document** button.

- Select the **Preview** button.

  The Participation Agreement is printable from here, select the printer icon in the top right corner of the Quote Preview window.

- Select the X to close the Quote Preview window.

Quote Preview

1 / 4   — 125% +   ⊡ ↺   ⬇ 🖶 ⋮

PARTICIPATION AGREEMENT
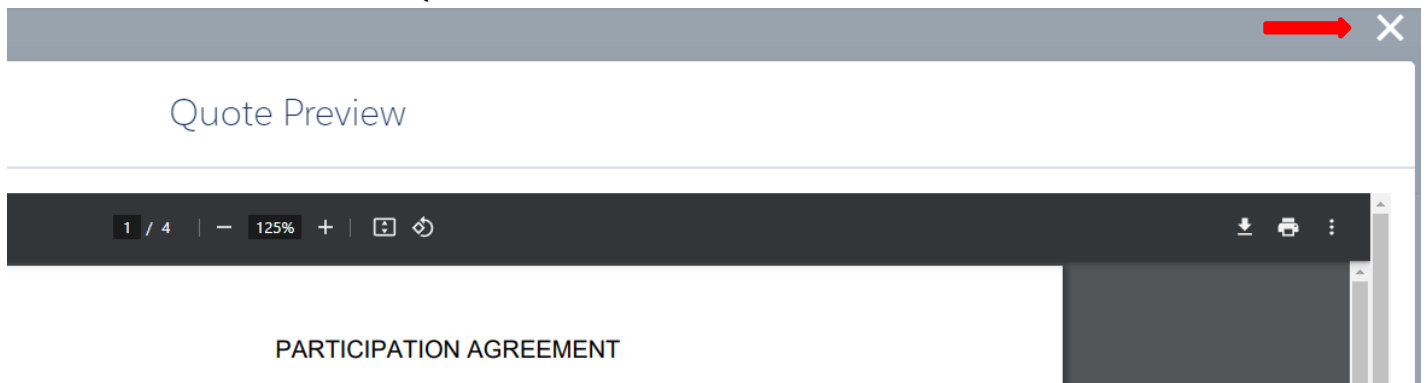
- Select the **Sent to Adobe Sign** button.

Step 24 - Advertiser E-sign

This section is emulating the customer experience to explain the CPQ process fully. These are not steps that sales reps will normally complete. These are the steps a sales rep will have the advertiser complete.

- Go to the inbox of the personal email address used for this related contact record and locate the email from your name via Ad. adobesign@adobesign.com (the subject line is "Signature requested on Q-111111-11111111-1111").

Check the Spam folder if the email is not in the inbox. Select the Report not spam button to move the message to the inbox and open the email in the inbox.

- Select the **Sign Now** button.

- Scroll to the **Advertiser's Authorized Representative** signature line indicated by the Start flag.

- Click on the **Click here to sign** link.

Choose the **Type** option (options include: type, draw, image, mobile).

- E-sign on the signature line indicated by the Adobe Sign flag.

- Select the **Apply** button.
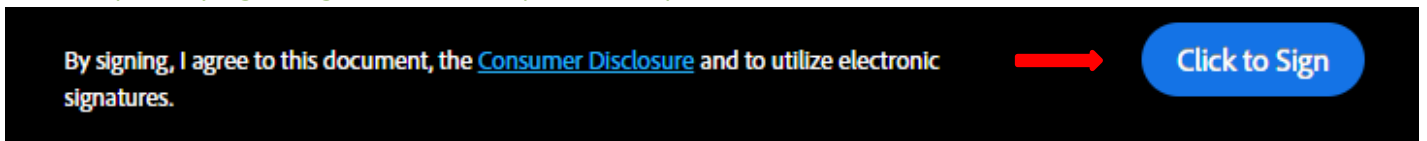

- Select the **Click to Sign** button that appears at the bottom of the screen.

Advertisers can select the Adobe Terms of Use and Consumer Disclosure links to review this documentation in a separate browser window. Advertisers have the option of downloading a copy of the partially signed agreement at this point in the process.

Step 25 - Sales Rep Co-sign

- Go to the designated training user Office365 Outlook inbox (e.g., crm_user5@clipper.com) and locate the email from Adobe Sign (the subject line is "Your signature is required on Q-xxxxx-xxxxx").

  Normally this will be the sales rep's Clipp email inbox.

- Select the **Click here to review and sign Q- xxxxx-xxxxx** link.

  Never forward these rep signature emails. Use the delegation 'click here' link to send the document to another authorized person to sign.

- Scroll to the **Valpak Authorized Representative** signature line indicated by the Start flag.

- Click on the **Click here to sign** link.

- Choose the **Type** option (options include: type, draw, image, mobile).

- Review e-signature.

  The e-sign signature line automatically populates the sales rep name based on the quote owner.

- Select the **Apply** button.
- Select the **Click to Sign** button that appears at the bottom of the screen.

  Reps have the option of downloading a copy of the fully signed agreement at this point in the process; however, advertisers and reps automatically receive a copy of the fully signed agreement via email.