

*Clipper* MAGAZINE

CPQ

Orientation Part 1

# AGENDA



1. CPQ Basics
2. Quote Buttons & Icons
3. Creating a Quote
4. Completing a Quote

# CPQ BASICS

# WHAT IS CPQ?

## What Does CPQ Actually Do?

With Salesforce CPQ, you can create quotes quickly, with minimal effort and minimal error.



**QUOTE** – proposal to the client

**AGREEMENT** – paper or electronic document containing client signature agreeing to the sale (electronic document only visible when using e-signature process)

**CONTRACT** – Accepted quote details (visible only after client acceptance)

# WHAT IS A BUNDLE?



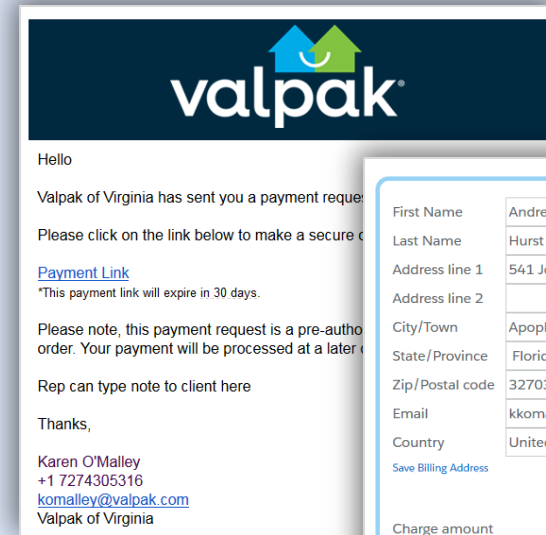
#	PRODUCT NAME	START...	QUA...	VOL...	DIST
1	Single Panel Insert w/Digital	5/1/2024			
2	Single Panel Insert 2-Sided	5/1/2024	6	60,000	
3	Local	5/1/2024	3	30,000	✓
4	Outbound	5/21/2024	1	10,000	✓
5	Bulk	5/1/2024	2	20,000	
6	Surcharge	5/1/2024		4,000	
7	Processing and Handling Fee	5/1/2024	1		
8	Digital Package	5/1/2024	1		
9	Call Tracking	5/1/2024		1,000	



A **Bundle** is like a bucket which holds related products that have to or can be sold as a kit.



# PRIMARY CONTACT MUST HAVE EMAIL



First Name	Andrea
Last Name	Hurst
Address line 1	541 Johns Rd
Address line 2	
City/Town	Apopka
State/Province	Florida
Zip/Postal code	32703-6204
Email	kkomalley@gmail.com
Country	United States

Charge amount \$ 300.00

Choose Payment method  
 Credit Card  Bank Account

Card Number	4111 1111 1111 1111	Security Code	●●● ?
Name on Card	Andrea Hurst	Expiration	MM / YY

Charge Cancel

Email on this side of the house is how we ask clients to electronically sign something. Or to capture info about their credit card or payment data.

Remind them we need the email to send a quote for signature, and to request payment info. This is purely for BUSINESS Communications.

This can not be an @clippermagazine.com or @valpak.com email

# MAILING DATES SCHEDULE

On the Home Page, you will see the Mailing Dates to utilize when trying to see when a particular area is mailing.

The screenshot displays the Valpak web application interface. The top navigation bar includes the Valpak logo, a search icon, and a user profile picture. The main navigation menu contains 'Franchise Sales', 'Home', and 'Reports'. The 'Home' page shows a message: 'Nothing due today. Be a go-getter, and ch...' with a 'View All' link. A secondary navigation bar includes 'Out Queues', 'Tasks', 'Chatter', 'Dashboards', and 'More'. The 'Mailing Dates' section is expanded, showing a 'My Valpak Mailing Schedule' card. This card features a search form with fields for 'Market' (3131), 'State or Zip' (GA), 'MailDate From' (Ma), and 'MailDate To' (No), along with a 'View' button. Below the search form is a table with columns: 'Na...', 'Mail D...', 'In-Ho...', '#N...', 'Fra...', and 'M...'. The table contains six rows of mailing schedule data.

Na...	Mail D...	In-Ho...	#N...	Fra...	M...
676220	06/07/2...	06/10/2...	76	Atlanta ...	2024-06
676221	07/12/2...	07/15/2...	76	Atlanta ...	2024-07
676222	08/09/2...	08/12/2...	76	Atlanta ...	2024-08
676223	09/06/2...	09/09/2...	76	Atlanta ...	2024-09
676224	10/11/2...	10/15/2...	76	Atlanta ...	2024-10
676225	11/08/2...	11/12/2...	76	Atlanta ...	2024-11

# QUOTE BUTTONS & ICONS



# QUICK SAVE vs. SAVE BUTTON



Save & Stay




Save & Exit

You'll use both Quick Save and Save frequently, but they serve different purposes.

Remember, they both save, but

- Quick Save STAYS in the current window
- Save EXITS the current window and drops you into the next window.

# QUOTE LINE EDITOR BUTTON & ICON

RATE CARD	LIST UNIT PRICE	ADDITIONAL ...	PREV ...	% CHANGE	APPROV...	E
<b>1</b> 0.000	<b>2</b>		USD 0.00		<b>3</b>	
 400.000	 USD 100.000		USD 270.00	-62.96%		
1.850	USD 1.850		USD 5.00	48.15%		

- LOCK – Represents a field that CANNOT be edited by the rep.
- PENCIL – Represents a field that CAN be edited by the rep.
- PERSON – This will appear when a rep has quoted a product above their threshold % set by their sales leaders.

# QUOTE LINE EDITOR – BUNDLE CHANGES

#	PRODUCT NAME	START...	QUA...	VOLUME	DI		PACKAGE TOTAL	1	3	
1	✓ Single Panel Insert 2-Sided	1/5/202 4	1	10,000			USD 107.40	📄	🔧	🗑️
2	Surcharge	1/5/202 4	1					📄	2	
3	Local	1/5/202 4	1	10,000	⚠️			📄		

- PAGE LAYOUT – allows you to add sales promotions to your bundle.
- WRENCH – make changes to the selected product. You can add/remove local and outbound or add bulk and supplements here.
- TRASH CAN – deletes the current product selection from the quote.

# QUOTE LINE EDITOR - DISTRIBUTION

QUA...	VOL...	DIST	QUA...	VOL...	DIST	QUA...	VOL...	DIST	QUA...	VOL...	DIST
1	10,000		1	10,000		1	10,000		1	10,000	
1	10,000	⚠	1	10,000	⚠	1	10,000	✓	1	10,000	👉
1			1			1			1		

1. CAUTION TRIANGLE POINTED UP - When the distribution is missing or under the anticipated quantity.
2. CAUTION TRIANGLE POINTED DOWN - If the distribution is over the anticipated quantity.
3. GREEN CHECK MARK - Distribution selection matches the anticipated quantity.
4. POINTING FINGER – Typically appears after you clone the quote and means you need to review the distribution for this product.

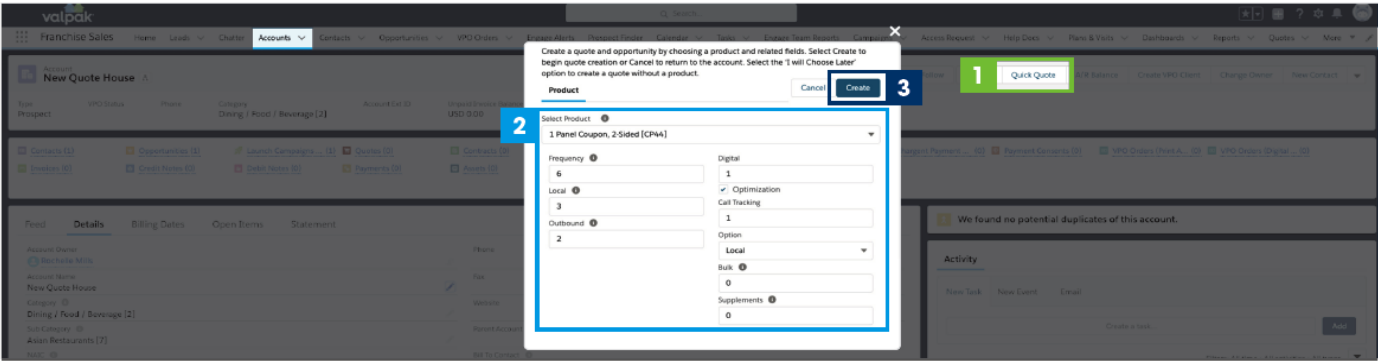
# CREATING A QUOTE

# Building Quote Cheat Sheet

**valpak** | BUILDING OUT YOUR QUOTE - Package Scenario

### Create Quote

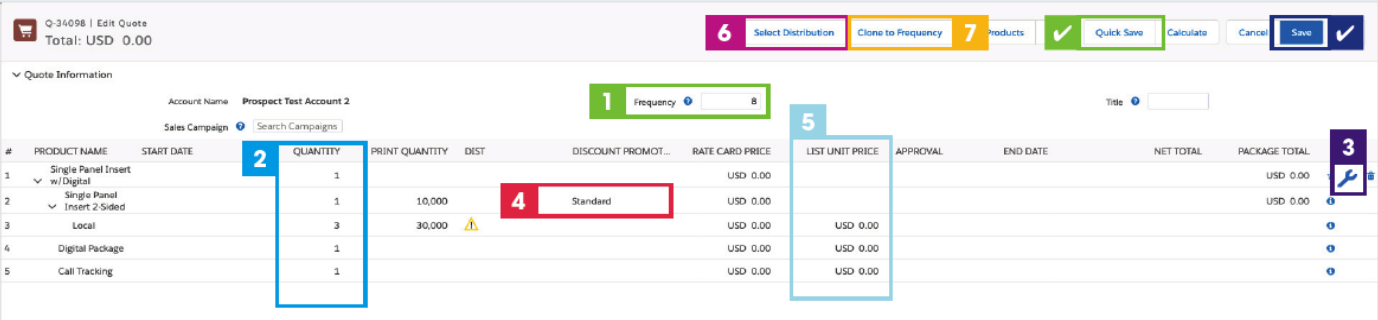
- 1 Quick Quote**  
Click on "Quick Quote" under Account tab
- 2 Product Info**  
Choose Product. Select Frequency, Local &/or Outbound print quantities, Digital Packages and # of Call Tracking Lines (Optional Bulk & Supplements)
- 3 Create**  
Click "Create" button to create and save Quick Quote



### Edit Quote

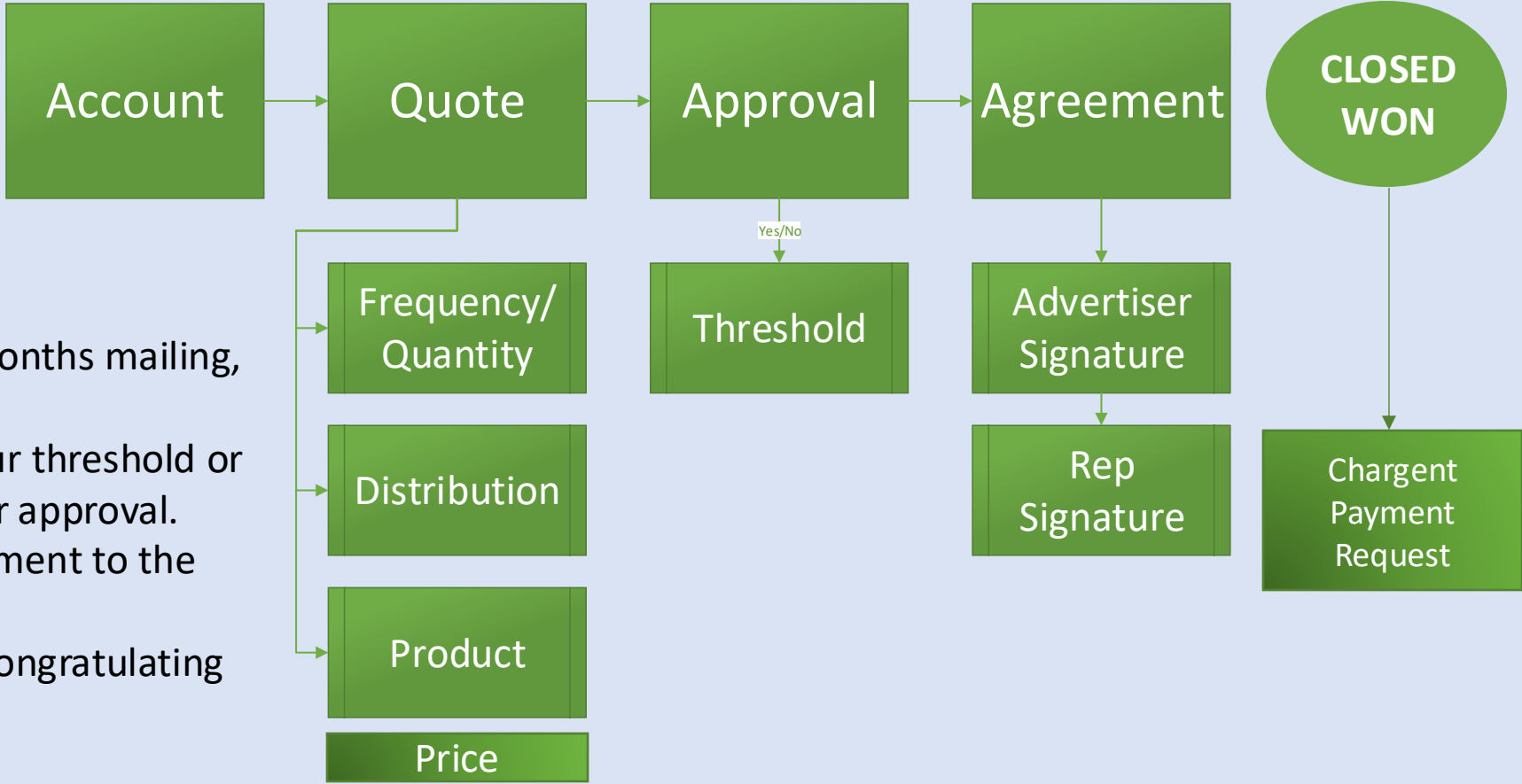
**Note:** The edits don't have to be done in any particular order.

- ✓ Don't forget to Quick Save!**
- ✓ Click the blue "Save" button to complete quote configuration**



- 1 Frequency**  
Set your frequency to the number of mailings
- 2 Quantity**  
Number of NTAs for your Inserts or quantity of Product
- 3 Configure Products**  
Configure product(s) within the quote line to add or take away product features (Examples: Outbound, Versioning, Digital Optimization)
- 4 Discount Promo/ Mailing Program**  
(use if applicable)  
Leave at standard rate or select different discount program
- 5 List Unit Price**  
Adjust the per NTA zone price above or below rate card price for print products, or adjust rates for digital and/or call tracking
- 6 Select Distribution**  
Select distribution for print products into local or outbound NTA zones  
Select NTAs one job at a time to an expanded Job  
AA AB AC
- 7 Clone to Frequency**  
Once done building the first quote line (a.k.a. mailing program) you clone the first product (job) to match the frequency selection

# CPQ QUOTE TO AGREEMENT PROCESS FLOW



Start on the Account record.  
Quick Quote – add product, qty of months mailing, price, distribution, ect.  
Submit for approval. If outside of your threshold or plus one/solo, it will require manager approval.  
Send to adobe sign – send the agreement to the client to sign, then you will sign.  
Salesforce will post to Ring the Bell congratulating you on your sale.

# STEP 1: START YOUR QUOTE

The screenshot shows the Salesforce interface for an account named 'Old Town Cafe'. The top navigation bar includes 'Franchise Sales', 'Home', 'Chatter', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Quotes', 'Agreements', 'VPO Orders', 'Calendar', 'Tasks', 'Reports', 'Engage Alerts', and 'More'. A search bar is located at the top right. The account header shows 'Account Old Town Cafe' with a '+ Follow' button and a blue arrow pointing to the 'Quick Quote' button. Below the header, there is a summary row with fields: Type (Client), VPO Status, Phone ((727) 399-3000), Category (Dining / Food / Beverage [2]), Account Ext ID, and Unpaid Invoice Balance (USD 0.00). A summary bar below this shows counts for various record types: Contacts (1), Opportunities (1), Quotes (1), Contracts (1), Orders (1), Chargent Orders (1), Transactions (1), Chargent Payment ... (0), VPO Orders (Print A... (0), VPO Orders (Digital... (0), Invoices (0), Credit Notes (0), Debit Notes (0), Payments (0), Assets (5), and Notes (0). A 'Show All (18)' link is also present. The main content area is divided into two sections. The left section is the 'Details' tab, showing fields for Account Owner (CRM User2), Account Name (Old Town Cafe), Category (Dining / Food / Beverage [2]), Sub Category (Buffet / Diner / Other [19]), NAIC, Phone ((727) 399-3000), Email (romills99@gmail.com), Fax, Website, Parent Account, and Bill To Contact. The right section is the 'Activity' tab, which displays a message: 'We found no potential duplicates of this account.' Below this is an 'Activity' section with tabs for 'New Task', 'New Event', 'Email', and 'Log a Call'. There is a 'Create a task...' input field and an 'Add' button. Below the activity section is a 'Next Steps' section with a 'More Steps' button and a task: 'Update Account Missing Fields' with a red flag icon and a date of 'Jun 21'. A notification at the bottom right says 'You have an upcoming task'.

The quoting process begins on the Account record in Salesforce. Click Quick Quote.



# STEP 2: QUICK QUOTE WIZARD

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** Cancel Create

Select Product ⓘ

Solo Postcards [Wrapper\_SOLO]

**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

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** Cancel Create

Select Product ⓘ

1 Panel Coupon, 2-Sided [CP44]

**1 Panel Coupon, 2-Sided [CP44]**

1 Panel Coupon, 1-Sided [CP40]

2 Panel Flyer, 2-Sided [2FP44]

3 Panel Flyer, 2-Sided [3FP44]

Circular, 12 Pages [CIR12]

On-Pak [G-ONPAK-MI]

Oversized Card, 2-Sided [OCB44-L]

PlusOne [DAP44-C]

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

Select an option under Select Product.

# STEP 2: QUICK QUOTE WIZARD

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** Cancel Create

Select Product ⓘ

1 Panel Coupon, 2-Sided [CP44]

Frequency ⓘ	Digital ⓘ
7	0
Local ⓘ	Call Tracking ⓘ
5	0
Outbound ⓘ	Bulk ⓘ
0	0
	Supplements ⓘ
	0

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.

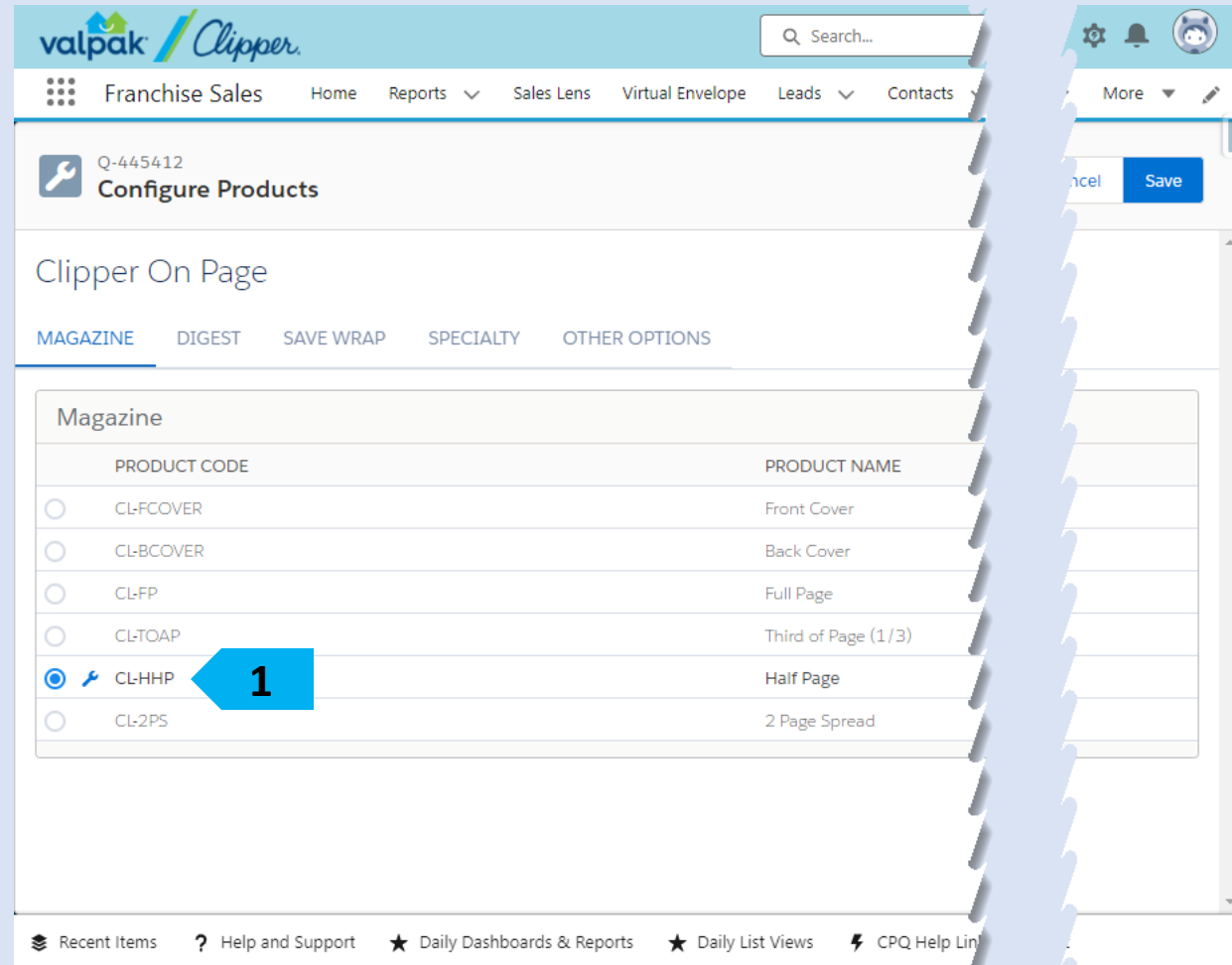
**Product** Cancel Create

Select Product ⓘ

Clipper On Page [CL-ONPAGE]

Depending on the Product you select, will determine if there are any addition fields to fill in. Click Create.

# STEP 3: CONFIGURE PRODUCTS



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Franchise Sales Home Reports Sales Lens Virtual Envelope Leads Contacts

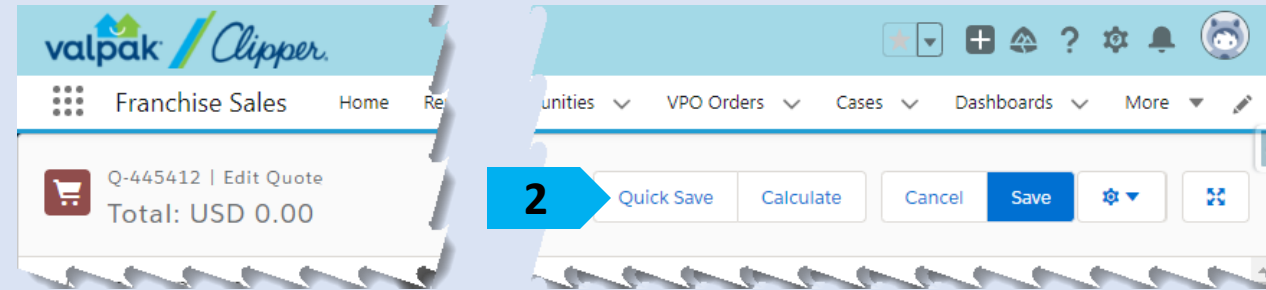
Q-445412  
Configure Products

Clipper On Page

MAGAZINE DIGEST SAVE WRAP SPECIALTY OTHER OPTIONS

PRODUCT CODE	PRODUCT NAME
<input type="radio"/> CL-FCOVER	Front Cover
<input type="radio"/> CL-BCOVER	Back Cover
<input type="radio"/> CL-FP	Full Page
<input type="radio"/> CL-TOAP	Third of Page (1/3)
<input checked="" type="radio"/> CL-HHP	Half Page
<input type="radio"/> CL-2PS	2 Page Spread

Recent Items Help and Support Daily Dashboards & Reports Daily List Views CPQ Help Lin



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Franchise Sales Home Reports Communities VPO Orders Cases Dashboards More

Q-445412 | Edit Quote  
Total: USD 0.00

Quick Save Calculate Cancel Save

Select the Magazine Product Code and then click Save.

Once the Edit Quote page loads, click Quick Save before making any other changes to your Quote.

# STEP 4: SELECT DISTRIBUTION

Q-395583 | Edit Quote  
Total: USD 400.00

**1** → Distribution Commission Clone Generate Document Add Products Quick Save Calculate Cancel Save

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Franchise Sales Home Reports Sales Lens Virtual Envelope Leads Contacts Accounts Tasks Quotes Opportunities VPO Orders Cases Dashboards More

If some of your monthly investments do not show here, close this popup and press quick save to avoid losing un-saved work.

Distribution

PRODUCT	DIST	START DATE	PRINT	DIST	MC
CL-ONPAGE	<b>2</b> → *	Jul 13, 2024	1	0	<input type="checkbox"/>
Half Page		Jul 13, 2024	0	0	

← Cancel

To proceed with the quote, Distribution is REQUIRED.  
Select Distribution and click the Star next to the product to add NTA's(Zones).

# STEP 4: SELECT DISTRIBUTION

Enter in Clipper and select the Market you are looking for.

Sandbox: SFTRAIN2 | Log out

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Search...

Franchise Sales Home Reports Sales Lens Virtual Envelope Leads Contacts Accounts

PRODUCT	LOCAL QTY	OUTBOUND QTY
Clipper On Page	0 0 selected	0 0 selected

+ Add Version Selected version: V1

Outbound

Search For Market

- NJ-New Jersey South [4620]
- NY-Albany [4621]
- NY-Buffalo [4622]
- NY-Rochester [4624]
- NY-Syracuse [4625]
- NY-Westchester [4626]
- OH-Cincinnati Market Sum [4627]
- OH-Dayton Market Summary [4628]
- OH-Market Magazine Summa [4629]
- OR-Portland [4630]
- PA-Harrisburg [4632]

To continue, search for a market.

Load From File Cancel Quick Save

Recent Items Help and Support Daily Dashboards & Reports Daily List Views CPQ Help Links Payment Help

# STEP 4: SELECT DISTRIBUTION

Select the NTA's(Zones)  
and then click Save.

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Franchise Sales Home Reports Sales Lens Virtual Envelope Leads Contacts Accounts Tasks Quotes Opp

Search For Market

PA-Pittsburgh [4637] PA-Pittsburgh [4637] (2) X

Filter Job / NTA Mail From Date Mail To Date Select NTAs one Job at a time to an expanded Job

Filter Job / NTA Jul 13, 2024 Enter Comma or Space Separated NTA(s) here...and Tab to Apply

Only Show Selected

NTA'S	MAIL DATE	IN HOME DATE	NTA QUANTITY	DOUBLE INSERT	MC
PA-Pittsburgh [4637] (5 jobs found)					
<input type="checkbox"/> 698507 (2 / 16)	Jul 22, 2024	Jul 24, 2024			
<input type="checkbox"/> QB - Pittsburgh-Greensburg/Latrobe			45,425	<input type="checkbox"/>	
<input type="checkbox"/> QC - Pittsburgh-Eastern Suburbs			48,348	<input type="checkbox"/>	
<input checked="" type="checkbox"/> QD - Pittsburgh-McMurray/Washington			50,605	<input type="checkbox"/>	
<input checked="" type="checkbox"/> QE - Pittsburgh-Mon Valley			43,835	<input type="checkbox"/>	
<input type="checkbox"/> QF - Pittsburgh-South Hills			56,679	<input type="checkbox"/>	
<input type="checkbox"/> QG - Pittsburgh-Greentree/Dormont			26,344	<input type="checkbox"/>	

Load From File Cancel Save Next

Recent Items Help and Support Daily Dashboards & Reports Daily List Views CPQ Help Links Payment Help Links Salesforce Help Links

# STEP 5: ALWAYS QUICK SAVE

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Franchise Sales Home Reports Sales Lens Virtualities Orders Cases Dashboards More

Q-445412 | Edit Quote  
Total: USD 1,180.50

Quote Information

Account Name THE MUTE BOUNCE

Sales Campaign Search Campaigns

#	PRODUCT NAME	START D...	QUA...	VOLU...	DIST	o C...	APPR...	END D...	NET TO...	PACKAG...
1	Clipper On Page	7/22/2024		95					USD 1,180.50	
2	Half Page	7/22/2024	94.440	94,440	✓			7/22/2024	USD 1,180.50	
3	Local Flavor Online Coupon	7/22/2024	1		[No]			7/22/2024	USD 0.00	

Always click Quick Save after making any changes or returning to the Edit Quote page.

# STEP 5: MAKING CHANGES TO BUNDLES

Sales Campaign

#	PRODUCT NAME	START D...	QUA...	VOLU...	DIST	PROMOT...	PROMO APPLIED	RATE CARD	LIST UNI...	ADDI...	PREV ...	% C...	APPR...	END D...	NET TO...	PACKAG...
1	Clipper On Page	7/22/2024		95		Standard	<input type="checkbox"/>	0.000								1.1
2	Half Page	7/22/2024	1,440	94,440	<input checked="" type="checkbox"/>			12,500	USD	12.500				7/22/202	USD	180.000

Q-445412 **Configure Products** Save

### Clipper On Page

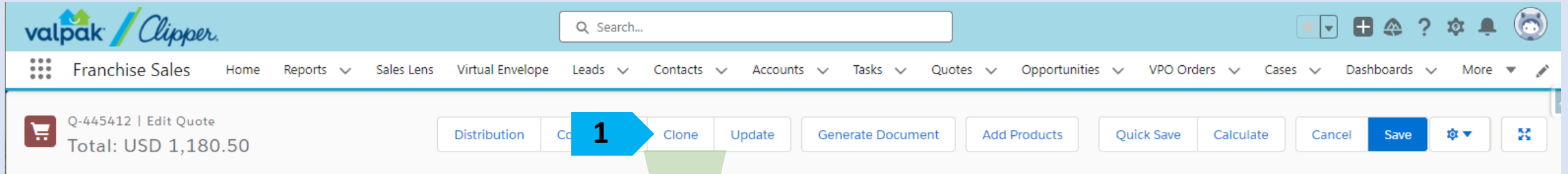
MAGAZINE DIGEST SAVE WRAP SPECIALTY OTHER OPTIONS

Magazine			
	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION
<input type="radio"/>	CL-FCOVER	Front Cover	Front Cover Outbound
<input type="radio"/>	CL-BCOVER	Back Cover	Back Cover Outbound
<input type="radio"/>	CL-FP	Full Page	Full Page Outbound
<input type="radio"/>	CL-TOAP	Third of Page (1/3)	1/3 of a Page
<input checked="" type="radio"/>	CL-HHP	Half Page	Half Page
<input type="radio"/>	CL-2PS	2 Page Spread	2 Page Spread Outbound

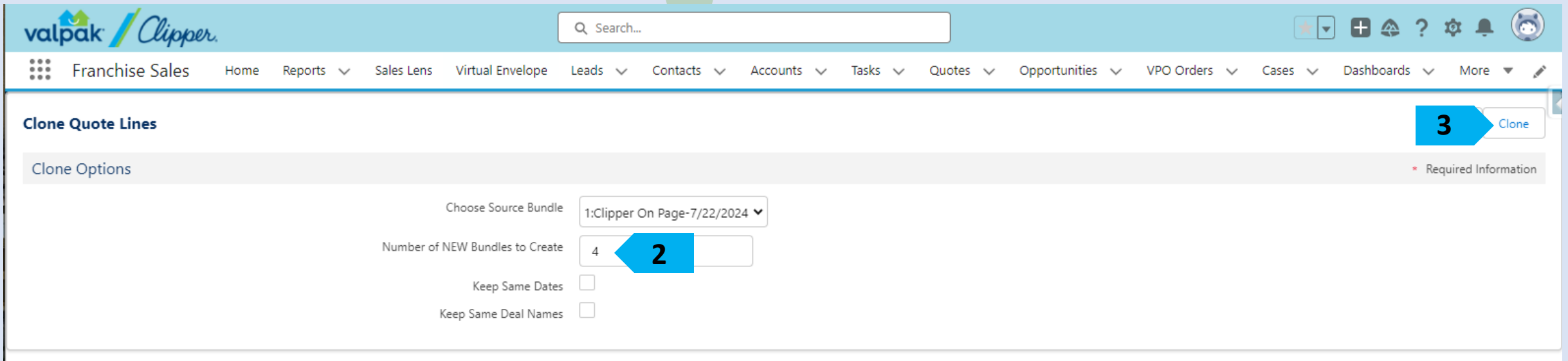
Click on the Wrench icon on your bundle. Make changes to your bundle and click Save.



# STEP 6: CLONING TO FREQUENCY



The screenshot shows the top navigation bar of the Valpak Clipper application. The search bar contains "Search...". The navigation menu includes: Franchise Sales, Home, Reports, Sales Lens, Virtual Envelope, Leads, Contacts, Accounts, Tasks, Quotes, Opportunities, VPO Orders, Cases, Dashboards, and More. Below the navigation bar, the quote details are displayed: "Q-445412 | Edit Quote" and "Total: USD 1,180.50". A row of action buttons is visible: Distribution, Clone (highlighted with a blue arrow and the number 1), Update, Generate Document, Add Products, Quick Save, Calculate, Cancel, and Save.



The screenshot shows the "Clone Quote Lines" screen. The "Clone Options" section is visible, with the following fields and options:

- Choose Source Bundle: 1:Clipper On Page-7/22/2024
- Number of NEW Bundles to Create: 4 (highlighted with a blue arrow and the number 2)
- Keep Same Dates:
- Keep Same Deal Names:

A "Clone" button is highlighted with a blue arrow and the number 3. A red asterisk and the text "Required Information" are visible in the bottom right corner of the form area.

Once your first product or product bundle is fully configured, hit the Clone button to enter the Clone Quote Lines screen. Enter in the Number of NEW bundles you wish to have created for you. Click Clone.

# STEP 7: ALWAYS QUICK SAVE

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Franchise Sales Home Reports Sales Lens Virtualities Orders Cases Dashboards More

Q-445412 | Edit Quote  
Total: USD 1,180.50

Quote Information

Account Name THE MUTE BOUNCE

Sales Campaign Search Campaigns

#	PRODUCT NAME	START D...	QUA...	VOLU...	DIST	o C...	APPR...	END D...	NET TO...	PACKAG...
1	Clipper On Page	7/22/2024		95					USD 1,180.50	
2	Half Page	7/22/2024	94.440	94,440	✓			7/22/2024	USD 1,180.50	
3	Local Flavor Online Coupon	7/22/2024	1		[No]			7/22/2024	USD 0.00	

Always click Quick Save after making any changes or returning to the Edit Quote page.

# CLONING TO FREQUENCY REMINDER

The screenshot shows the Valpak Clipper software interface. At the top, there is a search bar and navigation tabs for Franchise Sales, Home, Reports, Sales Lens, Virtual Envelope, Leads, Contacts, Accounts, Tasks, Quotes, Opportunities, VPO Orders, Cases, Dashboards, and More. Below the navigation is a quote header for 'Q-445412 | Edit Quote' with a total of 'USD 5,902.50'. A toolbar contains buttons for Distribution, Commission, Clone, Update, Generate Document, Add Products, Quick Save, Calculate, Cancel, and Save. The main section is titled 'Quote Information' and includes fields for Account Name (THE MUTE BOUNCE), Frequency (7), and Title. Below this is a 'Sales Campaign' search field. The central part of the interface is a table with columns: #, PRODUCT NAME, START D..., QUA..., VOLU..., DIST, PROMOT..., PROMO APPLIED, RATE CARD, LIST UNI..., ADDI..., PREV..., % C..., APPR..., END D..., NET TO..., and PACKAG... The table lists several items, including 'Clipper On Page' and 'Half Page' items. A callout box with a blue arrow points to a yellow warning triangle icon in the 'DIST' column of row 5, with the text: 'Notice Distribution Caution sign flagging a month without distribution'. The bottom of the interface features a footer with various help and support links.


#	PRODUCT NAME	START D...	QUA...	VOLU...	DIST	PROMOT...	PROMO APPLIED	RATE CARD	LIST UNI...	ADDI...	PREV ...	% C...	APPR...	END D...	NET TO...	PACKAG...	
1	Clipper On Page	7/22/2024		95		Standard	<input type="checkbox"/>	0.000								USD 1,180.50	
2	Half Page	7/22/2024	94,440	94,440				12.500	USD 12.500					7/22/2024	USD 1,180.50		
3	Local Flavor Online Coupon	7/22/2024	1					0.000	USD 0.000					7/22/2024	USD 0.00		
4	Clipper On Page	8/26/2024		95		Standard	<input type="checkbox"/>	0.000								USD 1,180.50	
5	Half Page	8/26/2024	94,440	94,440				12.500	USD 12.500					8/26/2024	USD 1,180.50		
6	Local Flavor Online Coupon	8/26/2024	1					0.000	USD 0.000					8/26/2024	USD 0.00		
7	Clipper On Page	9/30/2024		95		Standard	<input type="checkbox"/>	0.000								USD 1,180.50	
8	Half Page	9/30/2024	94,440	94,440				12.500	USD 12.500					9/30/2024	USD 1,180.50		
9	Local Flavor	9/30/2024	1					0.000	USD 0.000					9/30/2024	USD 0.00		

Subtotal: USD 5,902.50

After cloning, take a second glance at those distribution icons. If you have anything other than the green check, you will need to go into distribution again, select the correct bundle, and fix the distribution as needed.

# EDITING MULTIPLE DISTRIBUTION

If some of your monthly investments do not show here, close this popup and press quick save to avoid losing un-saved work.

 Distribution ← Cancel

PRODUCT	DIST	START DATE	PRINT	DIST	MC
∨ CL-ONPAGE Half Page	✳	Jul 22, 2024 Jul 22, 2024	95 94,440	94,440 94,440	<input type="checkbox"/>
∨ CL-ONPAGE Half Page	✳	Aug 26, 2024 Aug 26, 2024	95 94,440	20,000 20,000	<input type="checkbox"/>
∨ CL-ONPAGE Half Page	✳	Sep 30, 2024 Sep 30, 2024	95 94,440	20,000 20,000	<input type="checkbox"/>
∨ CL-ONPAGE Half Page	✳	Oct 28, 2024 Oct 28, 2024	95 94,440	20,000 20,000	<input type="checkbox"/>
∨ CL-ONPAGE Half Page	✳	Nov 25, 2024 Nov 25, 2024	95 94,440	20,000 20,000	<input type="checkbox"/>

Select the distribution you want to start on. You do not have to start on the 1<sup>st</sup> bundle.

# EDITING MULTIPLE DISTRIBUTION

1. If you need to swap out NTA's, uncheck the Only Show Selected box.
2. If changing NTA's, select and deselect the correct one. Click Quick Save
3. If you only needed to confirm all NTA's were correctly selected, click Quick Save.
4. Use Next to navigate to the next bundle for review/edit.
5. Click Save if you are done editing and want to go back to the Quote Edit page.

The screenshot shows the Valpak Clipper software interface. At the top, there is a search bar and navigation tabs including Franchise Sales, Home, Reports, Sales Lens, Virtual Envelope, Leads, Contacts, Accounts, Tasks, Quotes, Opportunities, VPO Orders, Cases, Dashboards, and More. Below the navigation, there is a summary section with 'Clipper On Page' showing 0 selected and 94,440 total. A '+ Add Version' button and 'Selected version: V1' are visible. The main area is titled 'Outbound' and contains a 'Search For Market' section with a search box and a dropdown menu showing 'PA-Pittsburgh [4637] (2)'. Below this are filter options: 'Filter Job / NTA' with a dropdown, 'Mail From Date' set to 'Aug 26, 2024', 'Mail To Date', and a text input for 'Select NTAs one Job at a time to an expanded Job'. A checkbox labeled 'Only Show Selected' is checked. A table below shows a list of NTAs with columns for NTA'S, MAIL DATE, IN HOME DATE, NTA QUANTITY, DOUBLE INSERT, and MC. The table has a dropdown for 'PA-Pittsburgh [4637] (1 jobs found)' and lists two items: '698508 (2 / 16)' and 'QD - Pittsburgh-McMurray/Washington'. The 'QD' item is checked. At the bottom, there are buttons for 'Load From File', 'Quick Save', 'Save', and 'Next'. Numbered callouts 1 through 5 point to the 'Only Show Selected' checkbox, the 'QD' checkbox, the 'Quick Save' button, the 'Save' button, and the 'Next' button respectively.

NTA'S	MAIL DATE	IN HOME DATE	NTA QUANTITY	DOUBLE INSERT	MC
PA-Pittsburgh [4637] (1 jobs found)					
<input type="checkbox"/>	698508 (2 / 16)	Aug 26, 2024	Aug 28, 2024		
<input checked="" type="checkbox"/>	QD - Pittsburgh-McMurray/Washington		50,605	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	QD - Pittsburgh-Mon Valley		43,835	<input type="checkbox"/>	

\*\*The Next button is a navigation button only. It will not save changes made.

# EDIT AFTER CLONING

Q-445412 | Edit Quote  
Total: USD 5,902.50

Account Name: T... TE BOUNCE  
Sales Campaign: [dropdown] ch Campaigns

Frequency: [input]      Title: [input]

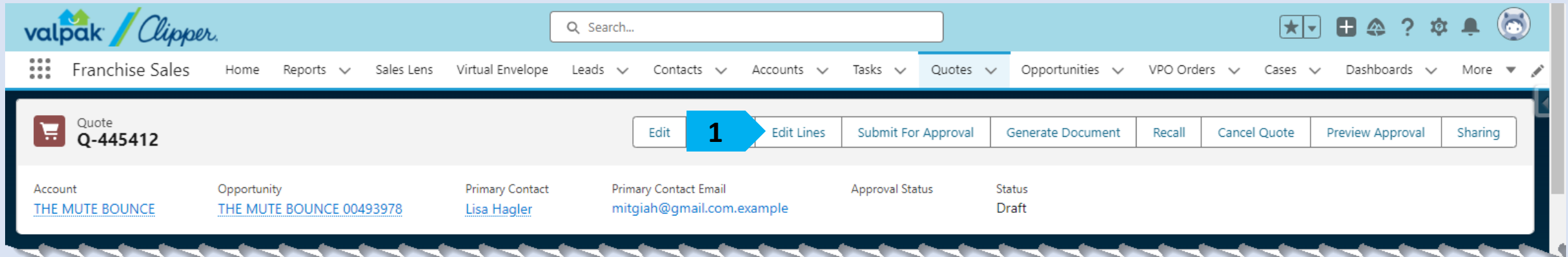
#	PRODUCT NAME	START D...	QUA...	VOLU...	DIST	PROMOT...	PROMO APPLIED	RATE CARD	LIST UNI...	ADDI...	PREV ...	% C...	APPR...	END D...	NET TO...	PACKAG...	
1	Clipper On Page	7/22/2024		95		Standard	<input type="checkbox"/>	0.000								USD 1,180.50	
2	Half Page	7/22/2024	94,440	94,440	✓			12.500	USD 12.500					7/22/2024	USD 1,180.50		
3	Local Flavor Online Coupon	7/22/2024	1					0.000	USD 0.000					7/22/2024	USD 0.00		
4	Clipper On Page	8/26/2024		95		Standard	<input type="checkbox"/>	0.000								USD 1,180.50	
5	Half Page	8/26/2024	94,440	94,440	✓			12.500	USD 12.500					8/26/2024	USD 1,180.50		
6	Local Flavor Online Coupon	8/26/2024	1					0.000	USD 0.000					8/26/2024	USD 0.00		
7	Clipper On Page	9/30/2024		95		Standard	<input type="checkbox"/>	0.000								USD 1,180.50	
8	Half Page	9/30/2024	94,440	94,440	✓			12.500	USD 12.500					9/30/2024	USD 1,180.50		
9	Local Flavor	9/30/2024	1					0.000	USD 0.000					9/30/2024	USD 0.00		

Subtotal: USD 5,902.50

You can still make changes to the quote lines even after cloning such as:

- Changing the QTY of a bundle
- Adjust the List Unit Price
- Edit Distribution
- Add Product

# SAVE INSTEAD OF QUICK SAVE







The screenshot displays the Valpak Clipper software interface. At the top, there is a search bar and navigation icons. Below the search bar is a navigation menu with options: Franchise Sales, Home, Reports, Sales Lens, Virtual Envelope, Leads, Contacts, Accounts, Tasks, Quotes, Opportunities, VPO Orders, Cases, Dashboards, and More. The 'Quotes' menu item is selected. The main content area shows a quote detail for 'Quote Q-445412'. A toolbar contains buttons: Edit, Edit Lines, Submit For Approval, Generate Document, Recall, Cancel Quote, Preview Approval, and Sharing. The 'Edit Lines' button is highlighted with a blue arrow and the number '1'. Below the toolbar, the quote details are displayed in a table format:

Account	Opportunity	Primary Contact	Primary Contact Email	Approval Status	Status
<a href="#">THE MUTE BOUNCE</a>	<a href="#">THE MUTE BOUNCE 00493978</a>	<a href="#">Lisa Hagler</a>	<a href="mailto:mitgiah@gmail.com">mitgiah@gmail.com.example</a>		Draft

It will happen to everyone at least once, you'll hit SAVE instead of Quick Save – don't panic! You can always get back to the Quote Line Editor when the quote is still in a Draft status by hitting the Edit Lines button.

# QUOTE NOTES

- **Internal Notes** – any additional notes for your manager/office manager.
- **Participation Agreement Notes** – any additional notes for the client. These will appear on the PDF Agreement.

Opportunity ⓘ
<a href="#">Old Town Cafe - Quick Quote</a>
Primary Contact ⓘ
<a href="#">Rochelle Mills</a>
Sales Rep ⓘ
 <a href="#">CRM User2</a>
∨ Approval
Approval Required ⓘ
<input type="checkbox"/>
Approval Status ⓘ
Approved
Submitted User ⓘ
 <a href="#">CRM User2</a>
Submitted Date ⓘ
6/21/2019
∨ Internal Notes 
Internal Notes ⓘ
PLEASE APPROVE THIS QUOTE WHAT TO DO WITH MY ORDER IN VPO
∨ Participation Agreement Notes 
Notes ⓘ
PUT EXTRA LANGUAGE ON THE AGREEMENT



# COMPLETING A QUOTE

# STEP 1 = SUBMIT FOR APPROVAL

The screenshot displays a CRM interface for a quote titled "Quote Q-34420". At the top, there is a navigation bar with buttons for "Edit", "Clone", "Submit For Approval" (highlighted with a blue arrow), "Generate Document", "Recall Approval", "Cancel Quote", and "Preview Approval". Below this, the quote details are shown: Account "Prospect Test Account 2", Sales Rep "CRM User2", Primary Contact "Rochelle Mills", Approval Status, and Status "Draft". A secondary bar shows links for "Quote Lines (10+)", "Quote Documents (0)", "Agreements (0)", "Approvals (0)", and "Quote History (4)". The main content area is split into two panels: "Details" on the left and "Distribution" on the right. The "Details" panel shows fields for Owner (CRM User2), Account (Prospect Test Account 2), Opportunity (Prospect Test Account 2 - Quick Quote), Primary Contact (Rochelle Mills), Status (Draft), Primary (checkbox), and Type (Quote). The "Distribution" panel shows a table with columns for PRODUCT, DIST, START DATE, and PRINT QTY, listing three entries for "Single Panel Insert 2-Sided" with quantities of 30,000.

PRODUCT	DIST	START DATE	PRINT QTY
Single Panel Insert 2-Sided	Local	Jul 22, 2019	30,000
Single Panel Insert 2-Sided	Local	Jul 22, 2019	30,000
Single Panel Insert 2-Sided	Local	Aug 19, 2019	30,000
Single Panel Insert 2-Sided	Local	Aug 19, 2019	30,000
Single Panel Insert 2-Sided	Local	Sep 16, 2019	30,000
Single Panel Insert 2-Sided	Local	Sep 16, 2019	30,000
Single Panel Insert 2-Sided	Local	Sep 16, 2019	30,000
Single Panel Insert 2-Sided	Local	Sep 16, 2019	30,000

You must hit Submit for Approval for ALL quotes – this starts the underlying approval processes.

# AUTOMATIC APPROVAL

If your quote is within threshold and not a product requiring approval, Salesforce will automatically approve the quote. The Status changes from Draft to Approved.

The screenshot displays a Salesforce Quote record for 'Quote Q-395583'. The record is associated with the 'Dunder Mifflin' account and 'Opportunity Dunder Mifflin 00440677'. The primary contact is 'Michael Scott' and the primary contact email is 'katiedomangue@gmail.com'. The approval status is 'Approved'. Below the header, there are links for 'Quote Lines (7)', 'Quote Documents (0)', 'Agreements (0)', 'Contracts (0)', and 'Orders (0)'. The 'Details' tab is selected, showing fields for Owner (Katie Melech), Account (Dunder Mifflin), Opportunity (Dunder Mifflin 00440677), Primary Contact (Michael Scott), and Sales Rep (Katie Melech). On the right side, the 'Status' is 'Approved', 'Primary' is checked, 'Signature Status' is empty, 'Client Agreed without e-Signature' is unchecked, and 'Type' is 'Quote'. A blue arrow points to the 'Approved' status.

Account	Opportunity	Primary Contact	Primary Contact Email	Approval Status
<a href="#">Dunder Mifflin</a>	<a href="#">Dunder Mifflin 00440677</a>	<a href="#">Michael Scott</a>	<a href="mailto:katiedomangue@gmail.com">katiedomangue@gmail.com</a>	Approved

[Quote Lines \(7\)](#) [Quote Documents \(0\)](#) [Agreements \(0\)](#) [Contracts \(0\)](#) [Orders \(0\)](#)

**Details** | [Staff](#) | [Commission](#) | [Distribution](#) | [Related Quotes](#)

Owner	<a href="#">Katie Melech</a>	Status	Approved
Account	<a href="#">Dunder Mifflin</a>	Primary	<input checked="" type="checkbox"/>
Opportunity	<a href="#">Dunder Mifflin 00440677</a>	Signature Status	
Primary Contact	<a href="#">Michael Scott</a>	Client Agreed without e-Signature	<input type="checkbox"/>
Sales Rep	<a href="#">Katie Melech</a>	Type	Quote

# MANAGER APPROVAL

If you discounted outside of your Threshold or are selling a product that requires manager approval, the Status changes to Manager Review and an email is sent to your approver(s).

The screenshot displays a quote record for 'Quote Q-395583'. The top section shows key details: Account (Dunder Mifflin), Opportunity (Dunder Mifflin 00440677), Primary Contact (Michael Scott), Primary Contact Email (katedomangue@gmail.com), and Approval Status (Pending). Below this, there are links for Quote Lines (7), Quote Documents (0), Agreements (0), Contracts (0), and Orders (0). The main section is titled 'Details' and includes tabs for Staff, Commission, Distribution, and Related Quotes. The 'Details' tab is active, showing fields for Owner (Katie Melech), Account (Dunder Mifflin), Opportunity (Dunder Mifflin 00440677), Primary Contact (Michael Scott), and Sales Rep (Katie Melech). On the right side of the details, there is a 'Status' field set to 'Manager Review', a 'Primary' field with a checked checkbox, a 'Signature Status' field, a 'Client Agreed without e-Signature' field with an unchecked checkbox, and a 'Type' field set to 'Quote'. A blue arrow points to the 'Status' field.

Quote	Q-395583
Account	Dunder Mifflin
Opportunity	Dunder Mifflin 00440677
Primary Contact	Michael Scott
Primary Contact Email	katedomangue@gmail.com
Approval Status	Pending

Quote Lines (7) | Quote Documents (0) | Agreements (0) | Contracts (0) | Orders (0)

Details | Staff | Commission | Distribution | Related Quotes

Owner	Katie Melech	Status	Manager Review
Account	Dunder Mifflin	Primary	<input checked="" type="checkbox"/>
Opportunity	Dunder Mifflin 00440677	Signature Status	
Primary Contact	Michael Scott	Client Agreed without e-Signature	<input type="checkbox"/>
Sales Rep	Katie Melech	Type	Quote

# MANAGER APPROVAL VIA EMAIL

Hello Holly Radford,

Lori Green is requesting your approval for a Quote, please see below.

**Quote Name:** [Q-01884](#)

**Opportunity Name:** [Apopka Food Truck Round Up - Quick Quote](#)

**Opportunity Owner:** Lori Green

**Quote Internal Notes:** Internal Notes Here

**Next Step:** To approve or reject this request, click on one of these links: [Approve](#) [Reject](#)

or reply to this email with the word APPROVE, APPROVED, YES, REJECT, REJECTED, or NO in the first line of the email message.

## Quote Line Items:

Number	Approval	Effective Start Date	Product Output	Discount Promotion	Quantity Output	Rate Card Price	List Unit Price	Net Total
1		11/19/2018	Single Panel Insert w/Digital	Standard	1	USD 0.00	USD 0.00	USD 449.00
2		11/19/2018	-----Single Panel Insert 2-Sided	Dining	30,000	USD 0.00	USD 0.00	
4		11/19/2018	-----Digital Package	Standard	1	USD 0.00	USD 149.00	
5		11/19/2018	-----Call Tracking	Standard	1	USD 0.00	USD 0.00	
3	Need Approval	11/19/2018	-----Local	Dining	30,000	USD 200.67	USD 100.00	
6		9/17/2018	Single Panel Insert w/Digital	Standard	1	USD 0.00	USD 0.00	USD 449.00
7		9/17/2018	-----Single Panel Insert 2-Sided	Dining	30,000	USD 0.00	USD 0.00	
9		9/17/2018	-----Digital Package	Standard	1	USD 0.00	USD 149.00	
10		9/17/2018	-----Call Tracking	Standard	1	USD 0.00	USD 0.00	
8	Need Approval	9/17/2018	-----Local	Dining	30,000	USD 200.67	USD 100.00	

The approver(s) gets an email like this

# MANAGER APPROVAL VIA EMAIL

Sandbox: Quote Approval - APPROVED: Q-02664 for Artistic Ceramic Tile Co



noreply@salesforce.com on behalf of SFINT

Thu 8/30, 2:01 PM

CRM User4

Hello Lori Green,

**Quote Name:** [Q-02664](#)

Approver : Holly Radford is Approved.

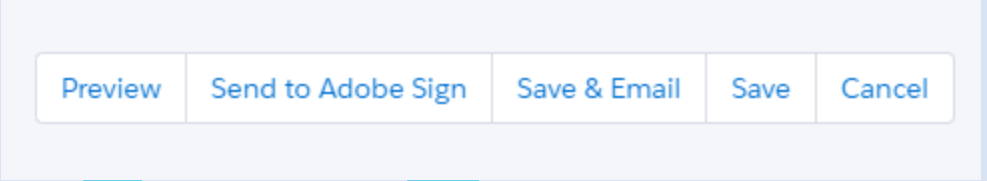
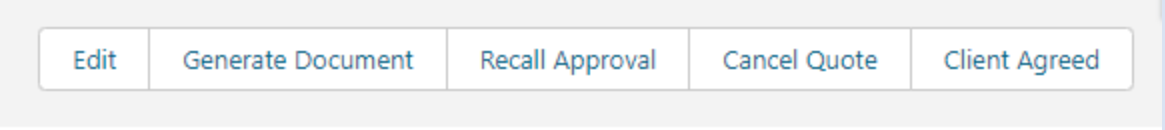
Approver Comments:

Once approved, you'll receive an APPROVED email. You'll notice the quote Status has moved from Manager Review to Approved.

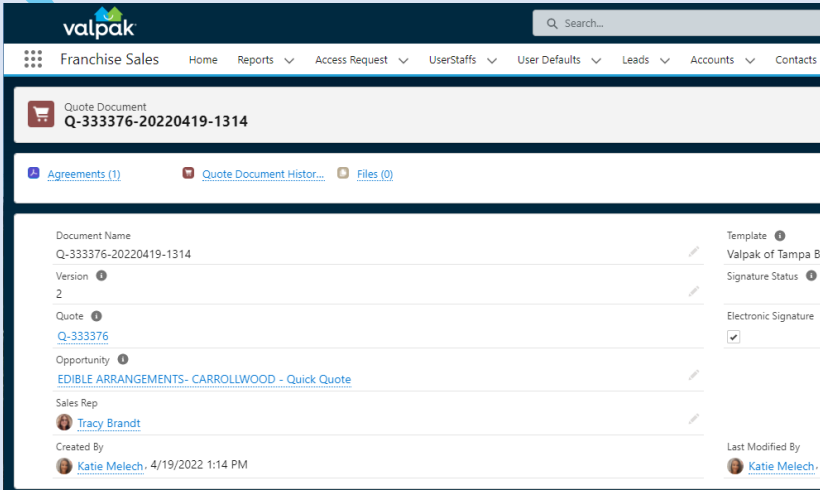
# STEP 2 = GENERATE, PREVIEW, & SEND AGREEMENT

After your quote has been approved, the next step is to send the agreement over to the client for their signature.

On the quote record page, click on Generate Document. Always preview your doc before sending it to the client to make sure everything is correct. Then click Send to Adobe Sign.



<b>Business Name</b> APPROVALS TEST ACCOUNT		<b>Contact</b> TEST-USER TESTING		
<b>Address</b> 5747 Lown Street North		<b>Title</b>		
<b>City</b> St. Petersburg		<b>Email</b> ravinsunkiller99@gmail.com		
<b>State/ZIP</b> FL , 33714		<b>Cell</b>		
<b>Telephone</b>				
Date	Product	Quantity	Sub Total	Total
08/14/2021	Single Panel Insert 2-Sided • East Tennessee (8/17/2021): HSD, NSL • Tampa Bay (8/18/2021): BB, BC - Local - Outbound	20,000 20,000	\$760.00	\$760.00
08/14/2021	Single Panel Insert 2-Sided • East Tennessee (8/17/2021): HSD, NSL • Tampa Bay (8/18/2021): BB, BC - Local - Outbound	20,000 20,000	\$760.00	\$760.00
09/11/2021	Single Panel Insert 2-Sided • East Tennessee (9/14/2021): HSD, NSL • Tampa Bay (9/15/2021): BB, BC - Local - Outbound	20,000 20,000	\$760.00	\$760.00
10/16/2021	Single Panel Insert 2-Sided • East Tennessee (10/18/2021): HSD, NSL • Tampa Bay (10/19/2021): BB, BC - Local - Outbound	20,000 20,000	\$760.00	\$760.00



# FINDING YOUR QUOTES

To find your quotes, you can either hover over the quotes link in the hyperlink section, or you can go to the quote tab and search by different list views.

Account: Dunder Mifflin

Buttons: + Follow, New Task, Launch, Quick Opportunity, Quick Quote, A/R Balance, Create VPO Client, Change Owner

Client Info: Type: Client, VPO Status, Phone: 555-555-5555, Category: Retail [9], Account Ext ID, Total Balance Due: USD 0.00

Navigation: Contacts (1), Cases (1), Opportunities (1), **Quotes (2)**, Contracts (1), Orders (3), Chargent Orders (1), Transactions (1), Chargent Payment Requ...

Section: **Quotes** (2 items • Sorted by Start Date • Updated a few seconds ago)

Quote Number	Start Date ↓	Status	Net Amount	Primary	Opportunity	Owner Alias	Type	Signature Status	Approval Status	
1	Q-395577	2/2/2024	Accepted	USD 8,249.88	<input checked="" type="checkbox"/>	Dunder Mifflin 00440674	kmele	Quote	Signed	Approved
2	Q-395583	1/5/2024	Approved	USD 1,069.43	<input checked="" type="checkbox"/>	Dunder Mifflin 00440677	kmele	Quote		Approved

View All

valpak

Search: Search...

Navigation: Franchise Sales, Home, Reports, Access Request, **Quotes**, Leads, Accounts, Contacts, Out Queues, Tasks, Chatter, Dashboards, Approvers, Opportunities, VPO Orders, More

Section: **Quotes Recently Viewed** (5 items • Updated a few seconds ago)

Buttons: Import, Change Owner

Search: Search this list...

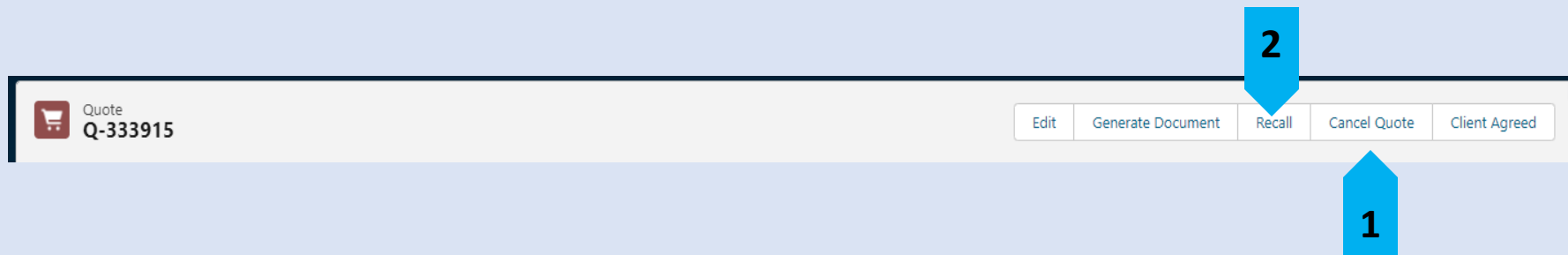
Quote Number	Owner Alias	Account	Primary	Status
1 <input type="checkbox"/> Q-395583	kmele	Dunder Mifflin	<input checked="" type="checkbox"/>	Approved
2 <input type="checkbox"/> Q-395577	kmele	Dunder Mifflin	<input checked="" type="checkbox"/>	Accepted
3 <input type="checkbox"/> Q-395332	kmele	BUBBLES IN THE HOUSE	<input checked="" type="checkbox"/>	Accepted
4 <input type="checkbox"/> Q-395302	kmele	BUBBLES IN THE HOUSE	<input checked="" type="checkbox"/>	Accepted
5 <input type="checkbox"/> Q-375756	PBlouis	RIO BRAVO TACOS & TAQUILLA	<input checked="" type="checkbox"/>	Draft



# CANCELLING & RECALLING QUOTES

## 1. CANCELLING QUOTES:

1. If you want to cancel the Quote, select **Cancel Quote**.
2. Once it is cancelled it cannot be reused.



## 2. RECALLING QUOTES:

1. Select **Recall Approval**.
2. Quote returns to draft status.
3. Make changes and resubmit for approval.