Clipper MAGAZINE

CPQ

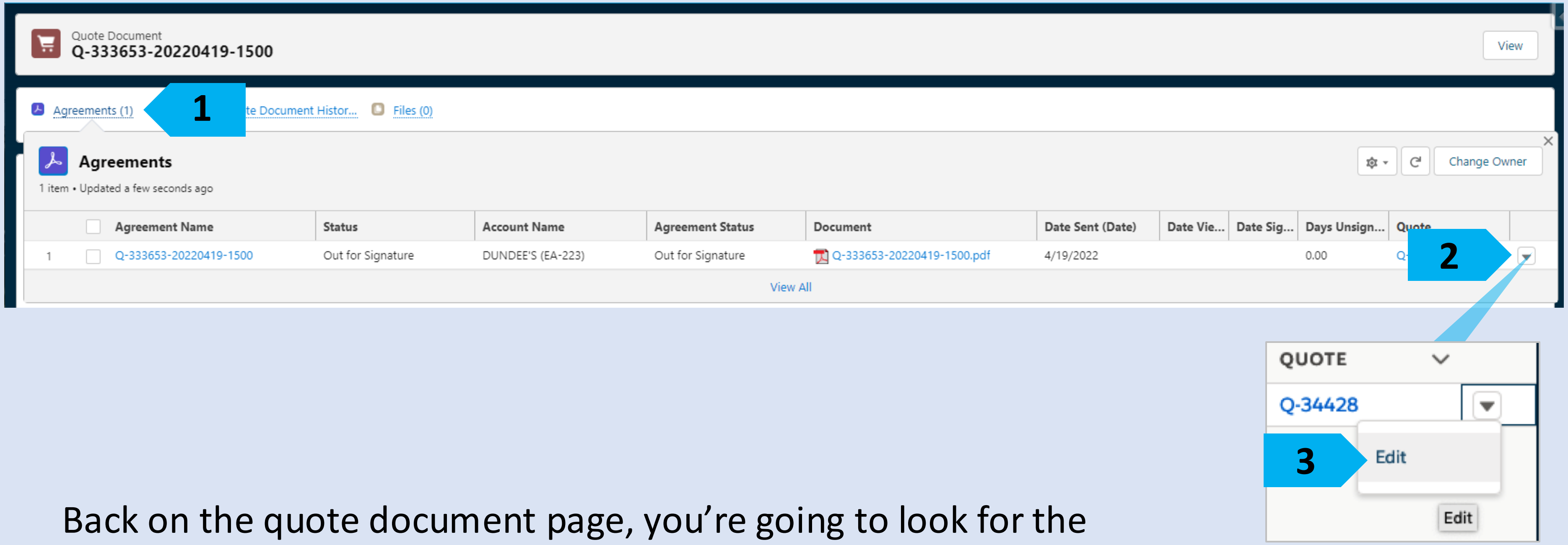
Orientation Part 2

AGENDA

1. Sign on Glass
2. Adobe Sign
3. Paper Contract
4. Payment Request
5. Payment Consent
6. Post Payment Consent

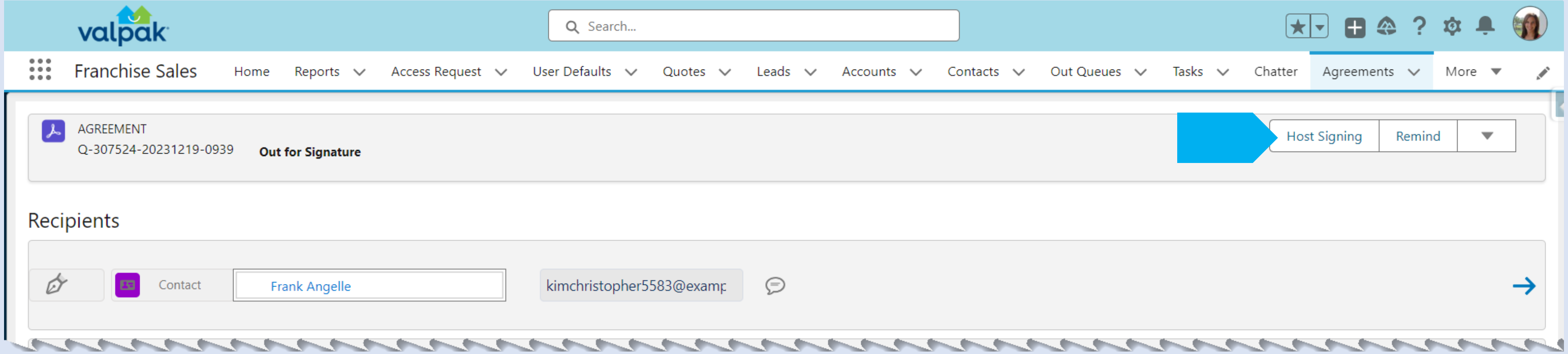
SIGN ON GLASS

EDIT THE AGREEMENT



Back on the quote document page, you're going to look for the agreement file in the upper left-hand corner. Click on the drop down next to the agreement and click Edit.

CLIENT: HOST SIGNING

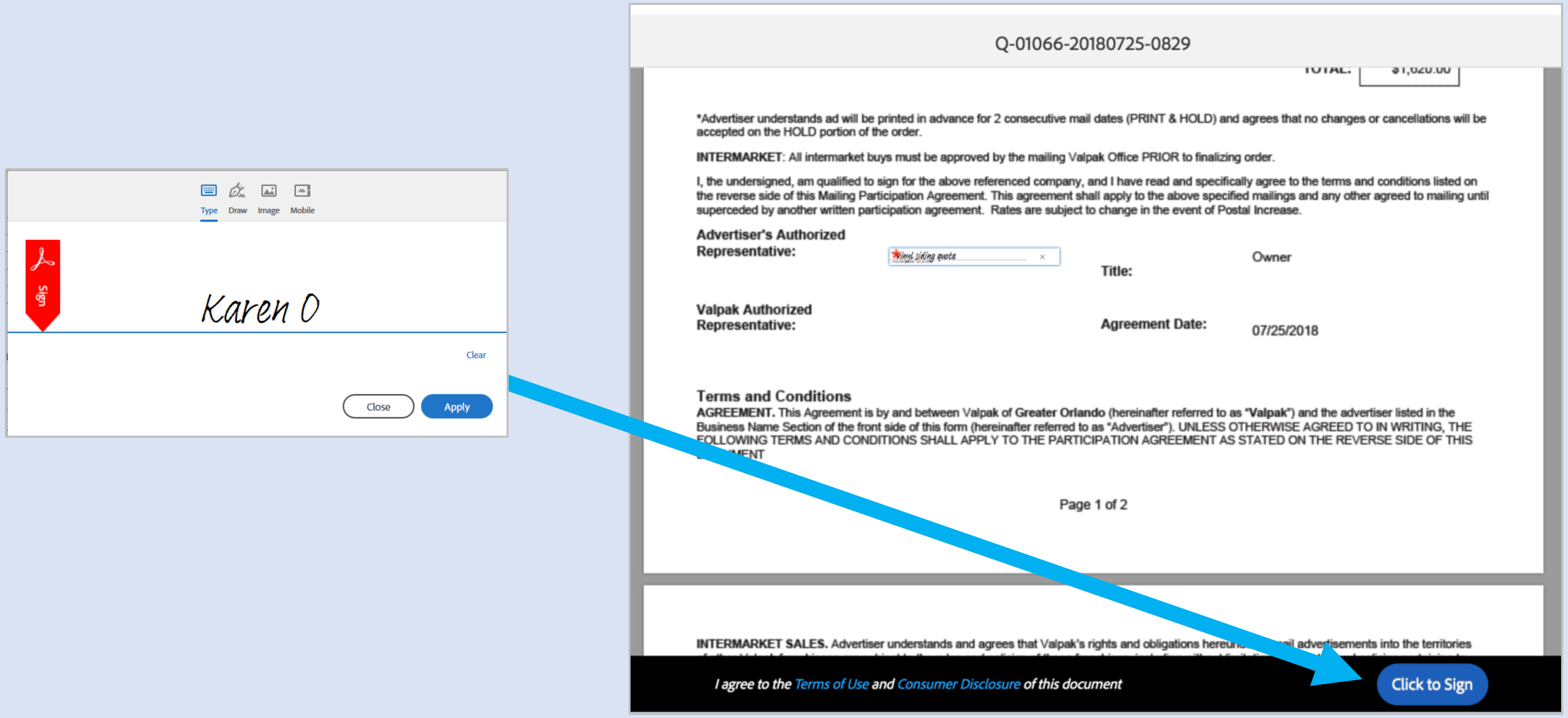


Next, it’s going to open the agreement document, and you’re going to click HOST SIGNING. That will open the document for client signature.

Then you go back to the agreement, edit, click HOST SIGNING, and now YOU sign on your signature line, apply and sign.

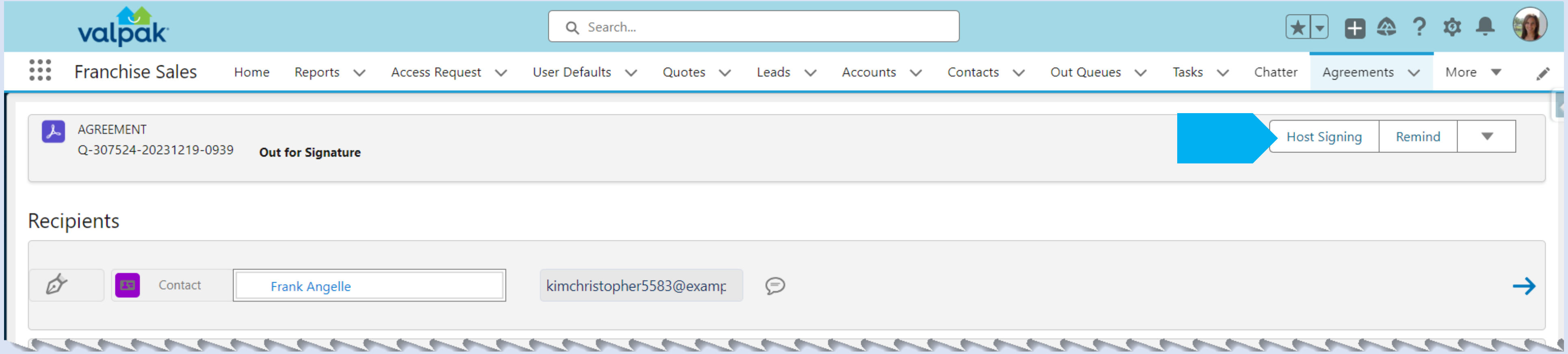
THIS DOES NOT ELIMIATE THE EMAIL THEY STILL GET THE EMAIL BUT YOU CAN GET THE SIG RIGHT Away.
IF YOU OPEN THE EMAIL, THEY HAVE ALREADY SIGNED IT

SIGN THE AGREEMENT



You will hand the device over to the client and let them sign the agreement. After they sign, you will repeat the process starting with the Host Signing button. You will sign the agreement and the Quote status will go from Waiting on Counter Signature to Accepted.

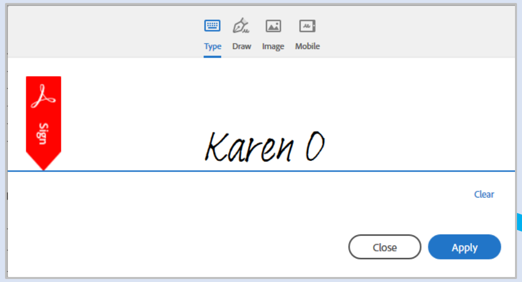
REP: HOST SIGNING

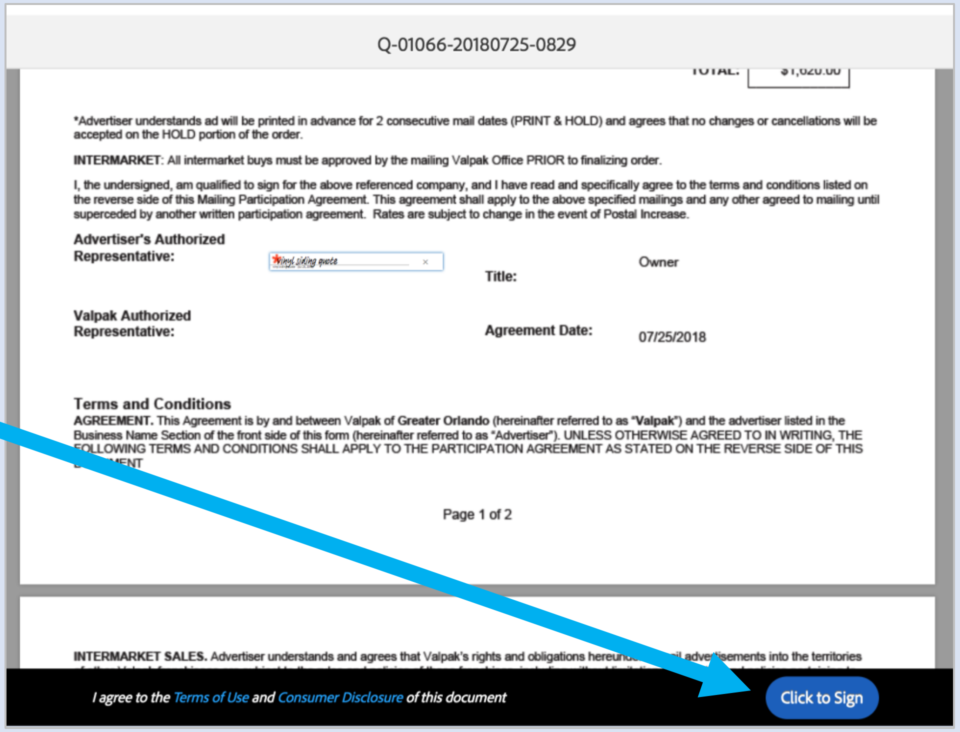


Then you go back to the agreement, click HOST SIGNING, and now YOU sign on your signature line, apply and sign.

THIS DOES NOT ELIMIATE THE EMAIL THEY STILL GET THE EMAIL BUT YOU CAN GET THE SIG RIGHT Away.
IF YOU OPEN THE EMAIL, THEY HAVE ALREADY SIGNED IT

SIGN THE AGREEMENT

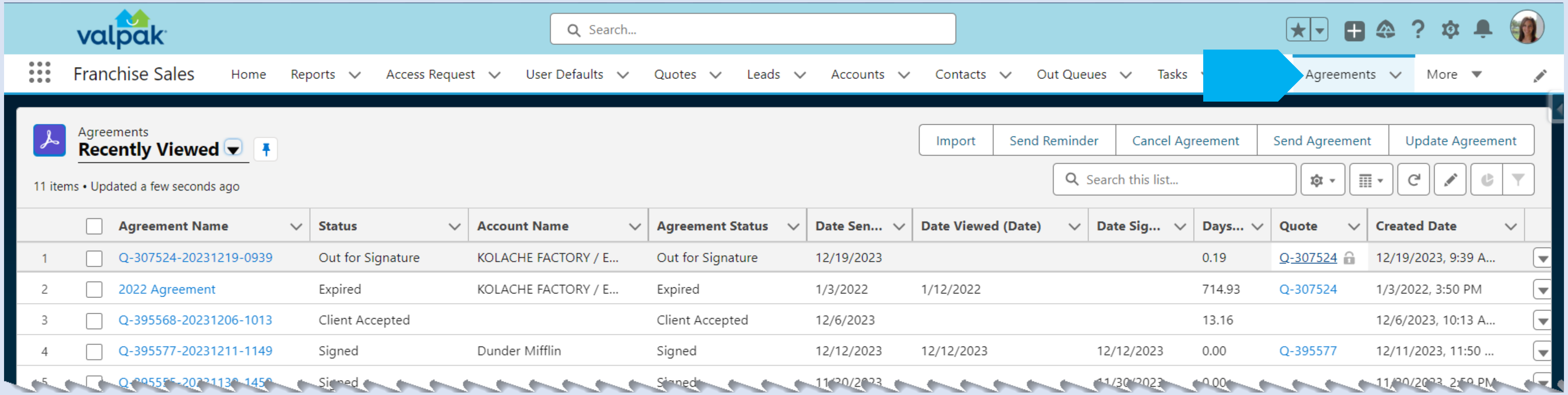




CONGRATULATIONS!

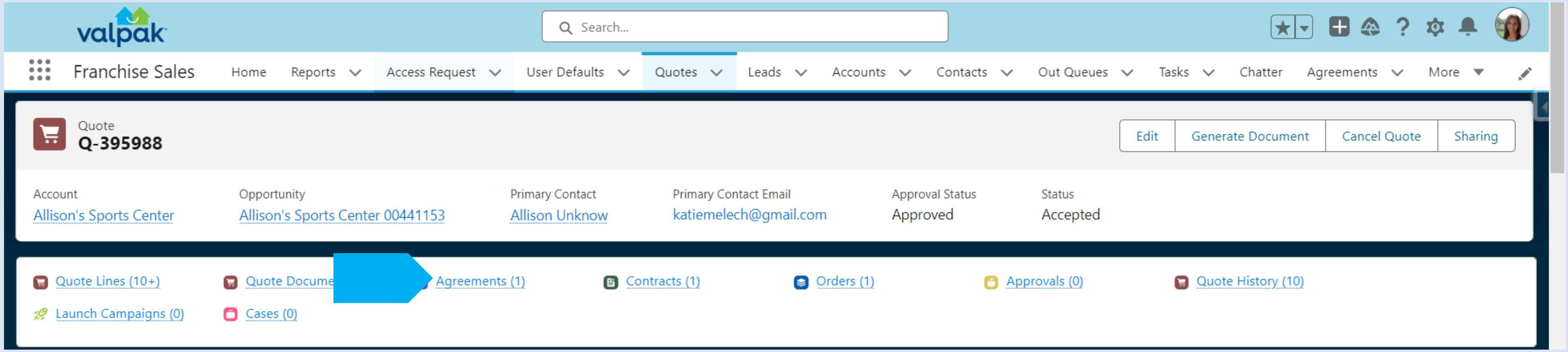
When your agreement is fully signed and becomes a CONTRACT, everyone gets notified. Your manager get an email and it appears in Ring the Bell on chatter.

FINDING AGREEMENTS



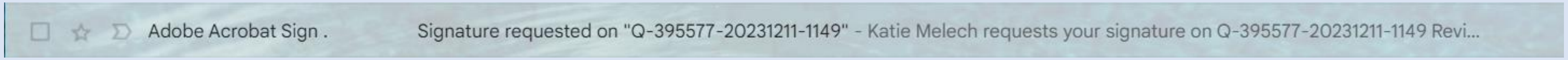
You'll be able to see all the agreements that are out for signatures a couple of different ways.

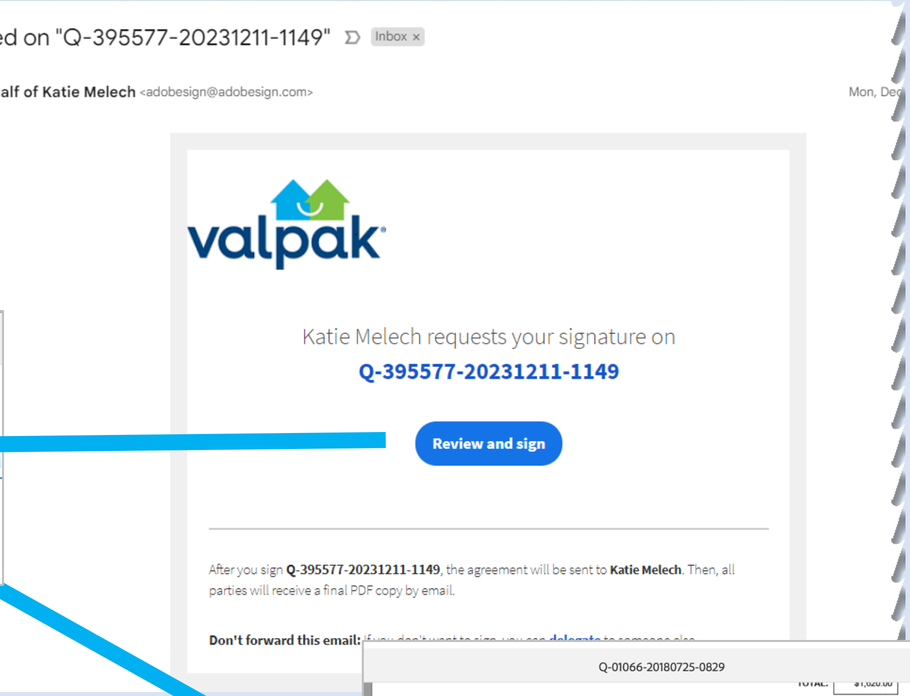
1. AGREEMENT TAB - You have a list view called "My Agreements Out for Signature" that shows all your agreements that have an Agreement Status of Out for Signature.
2. QUOTE RECORD – You can access the Agreements on the Quote Record.

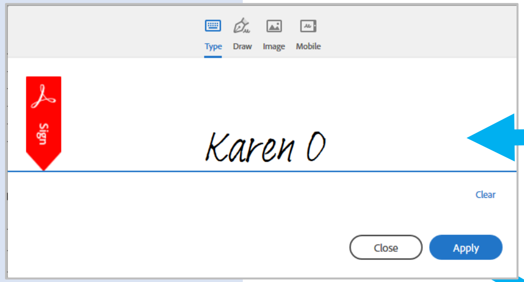


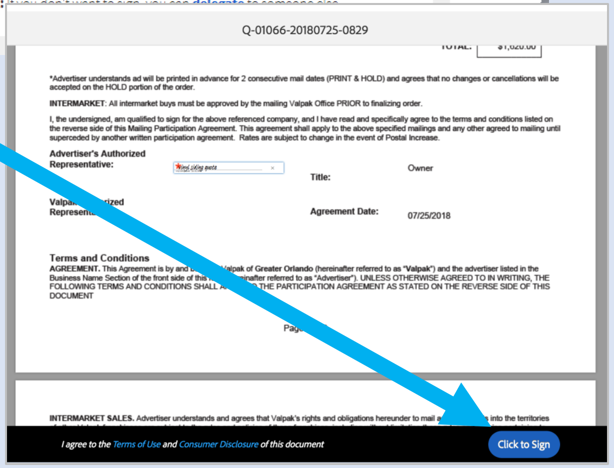
ADOBE SIGN

ADOBE EMAIL TO CLIENT









- The Agreement needs to be signed by both parties before the 10-day expiration date.

- If the client does not sign.. They get an email reminder every 3 days for 10 days.

ADOBE EMAIL TO REP

Once the client signs, you will get an email from Salesforce telling you its YOUR turn to sign it.

Click the link and you will go through the process to sign your name, apply, then click to sign. Then everybody gets a fully signed copy back to them. You don't have to upload or download things.

Please sign
Q-34013-20190508-1236

ro ro (romills99@gmail.com) has completed Q-34013-20190508-1236. Now it is your turn.

Click here to review and sign **Q-34013-20190508-1236.**

After you sign **Q-34013-20190508-1236**, all parties will receive a final PDF copy by email.

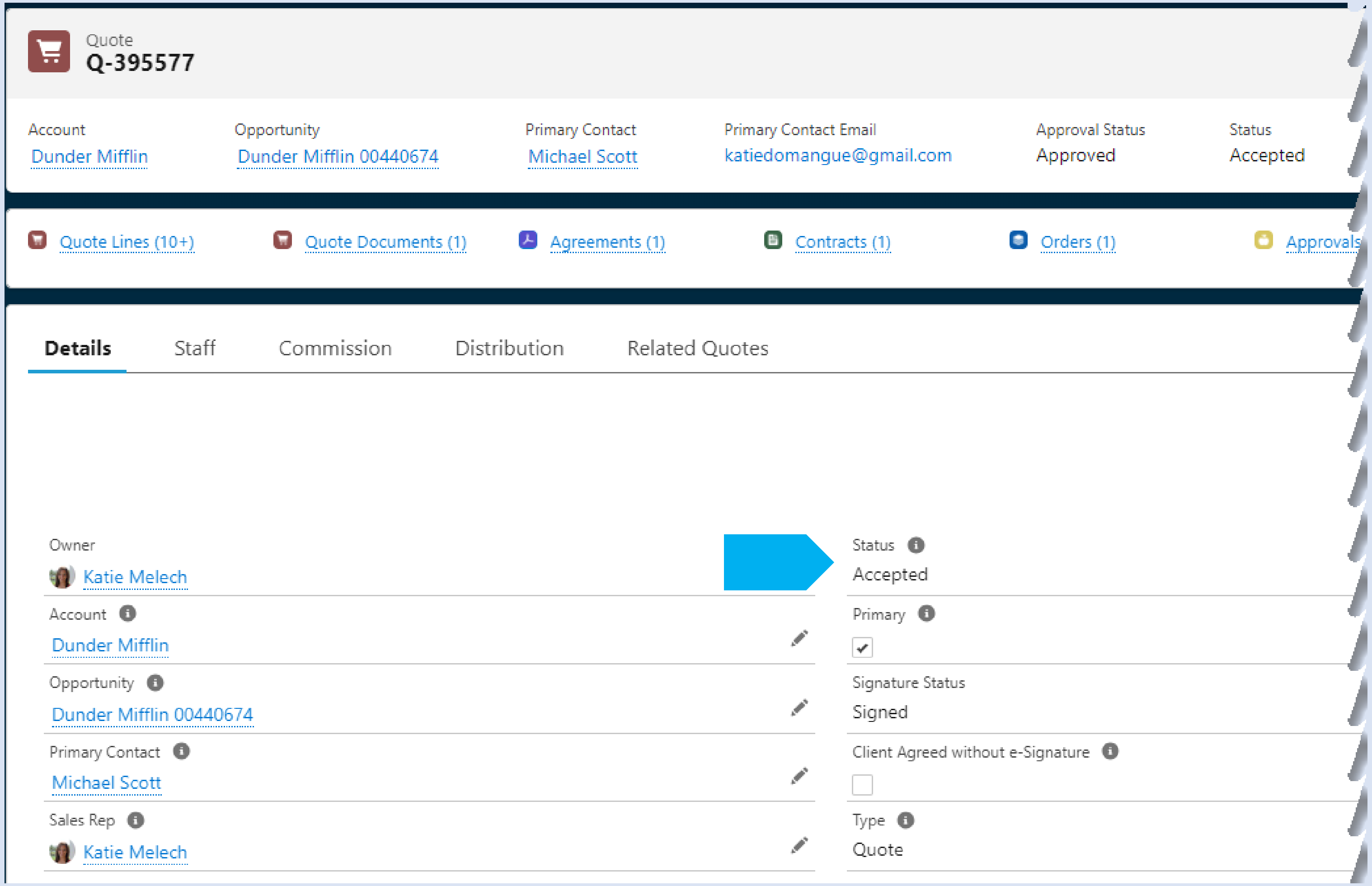
If you need to delegate this document to an authorized party for signature, **please do not forward this email.** Instead, click here to delegate.

This document is available for signing until May 18, 2019 and will expire thereafter.

Click the Blue Link to open up the Agreement to Co-Sign

STATUS UPDATED

Now that both the client and the rep have signed the Agreement, the Quote status changes to Accepted.



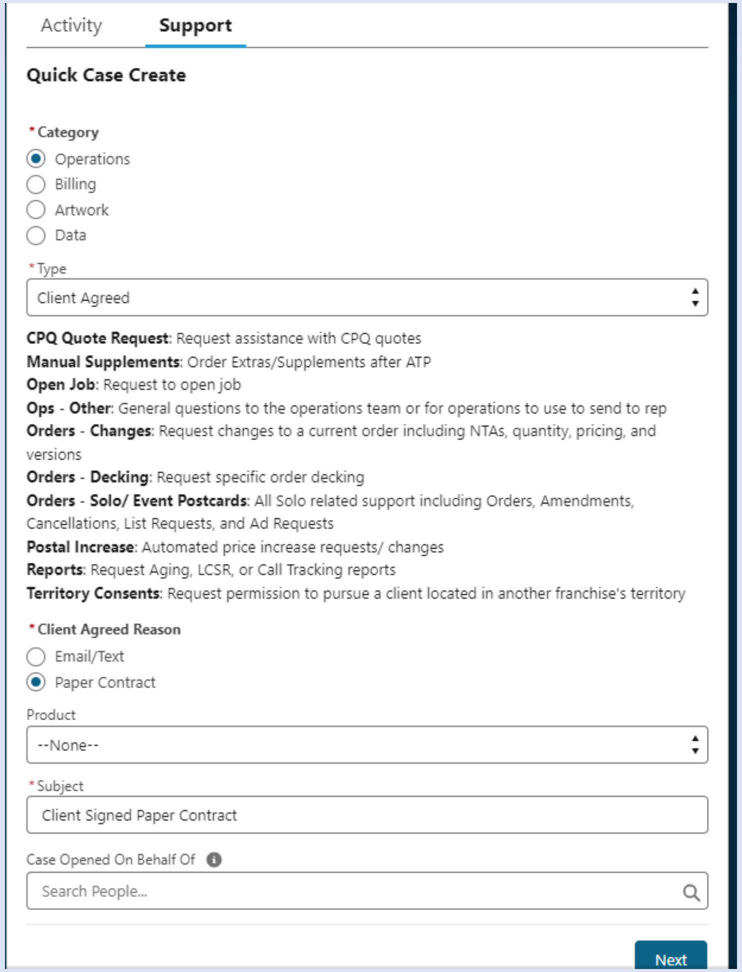
PAPER CONTRACT

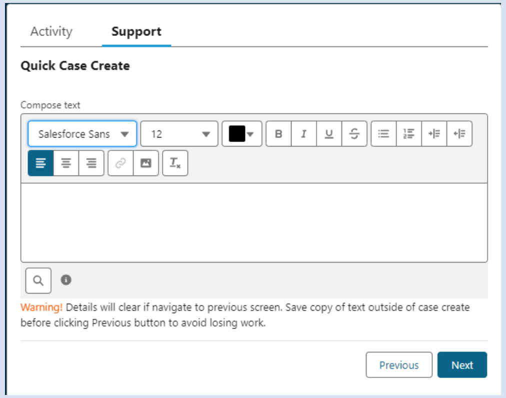
PAPER CONTRACT

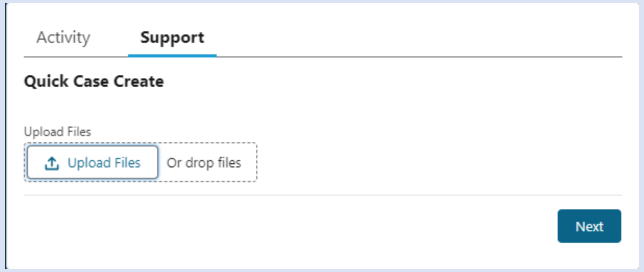
When you are unable to obtain the electronic signature through Adobe Sign, you must obtain a paper signature or email/text message from the client explicitly agreeing to a specified quote and quote amount. To get the quote to the Accepted status, you'll create a Case requesting Operations to use Client Agreed.

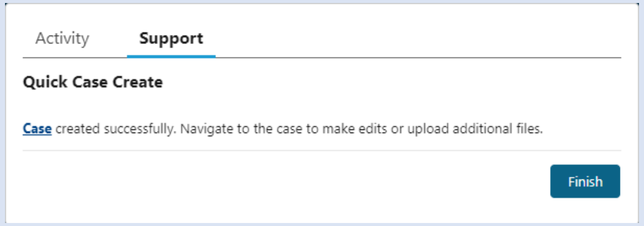
Once the client signs the paper agreement or sends an email/text, on the Quote page click Support.

1. Fill in the information to match above, click Next.
2. Add any additional information and click Next.
3. Upload a copy of the signed Agreement and click Next.









PAYMENT REQUEST

TAKING PAYMENTS

CAN	CANNOT
Request Payment Consent	Charge a Credit Card
Receive Preauthorization	

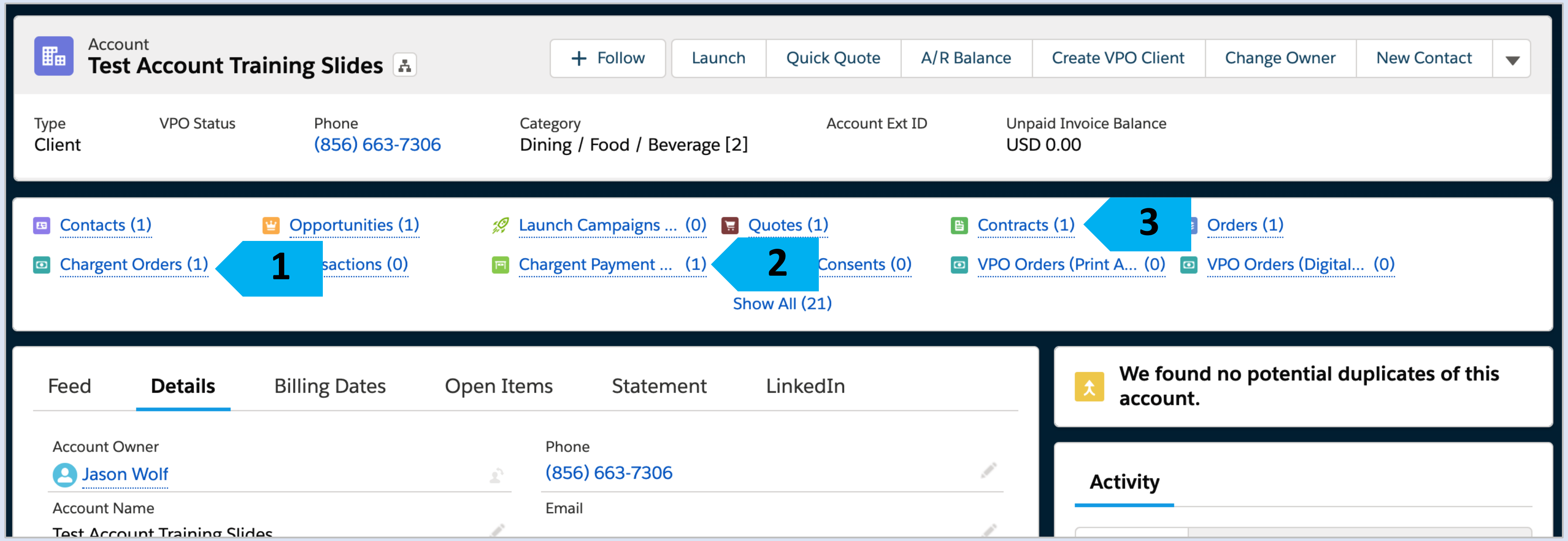
Reps Can

- Request payment consent
- Receive the client's CC or ACH payment information for preauthorization

Reps Cannot

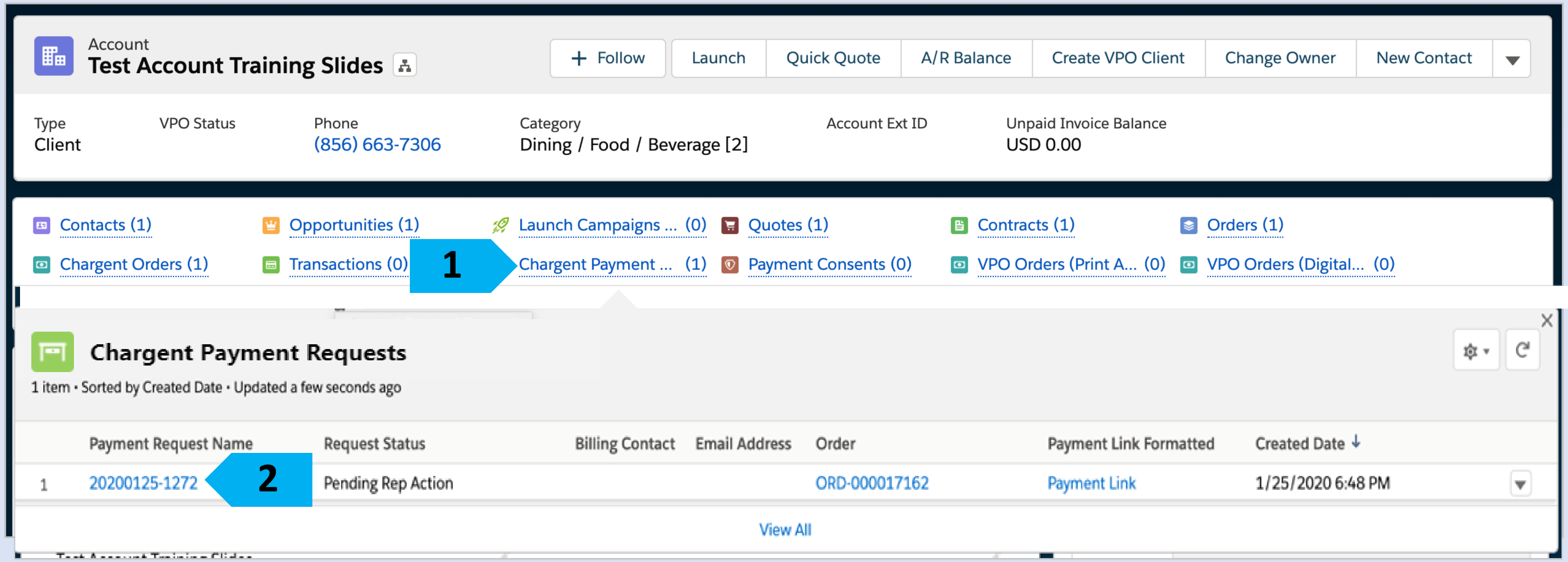
- Complete the actual charging of the cc. Franchise Operations Team in Florida will complete this.

AFTER QUOTE ACCEPTANCE



Once you close a deal, Salesforce spins up all the forms for you. You can access these records in a couple of different places, but for now, we will look at the Account Record.
On the Account Record, you can see the Chargent Order, Chargent Payment Request & Contract.

VIEW PAYMENT REQUEST



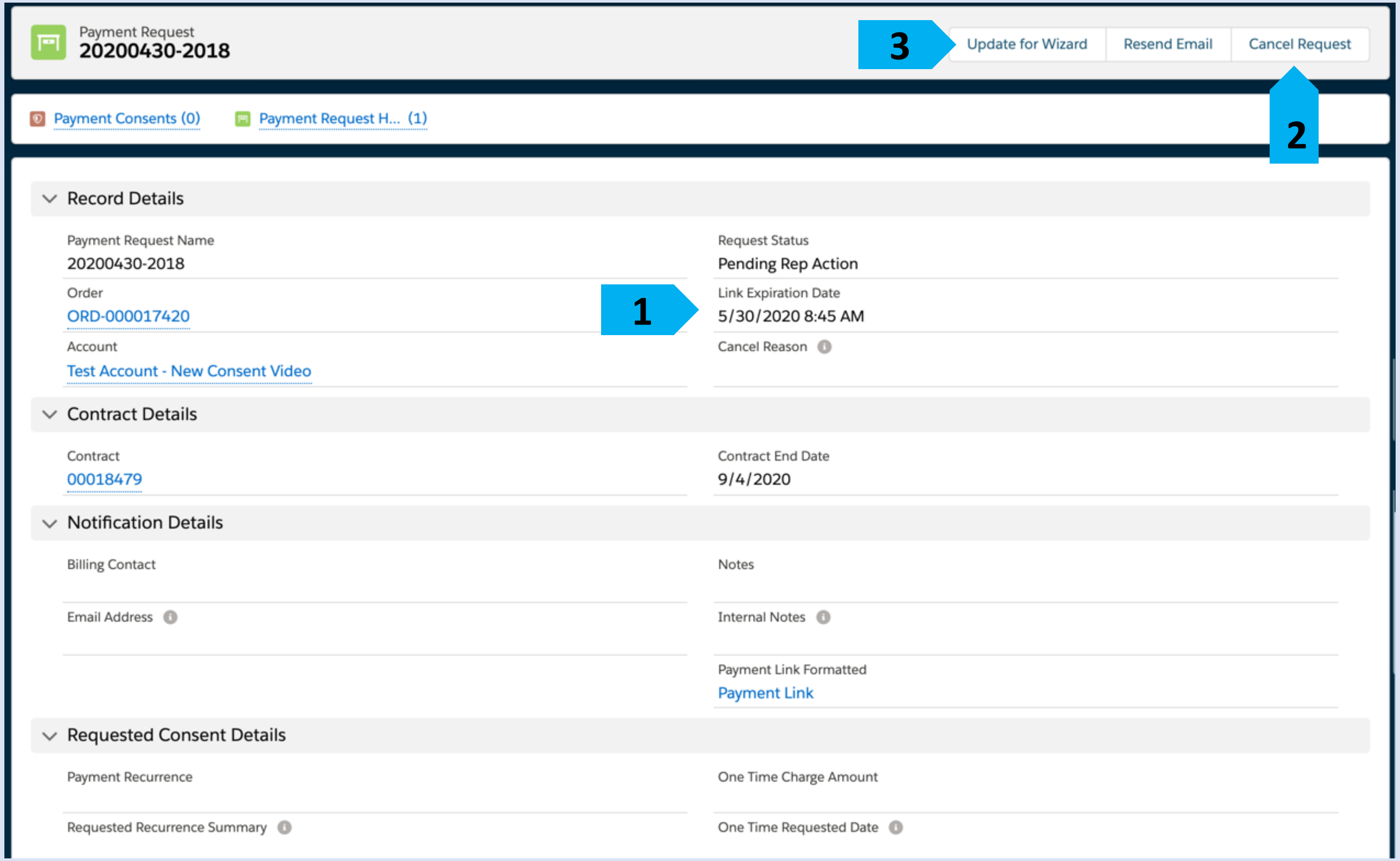
We are going to hover over the Chargent Payment Request and click on the payment request name.

PAYMENT REQUEST

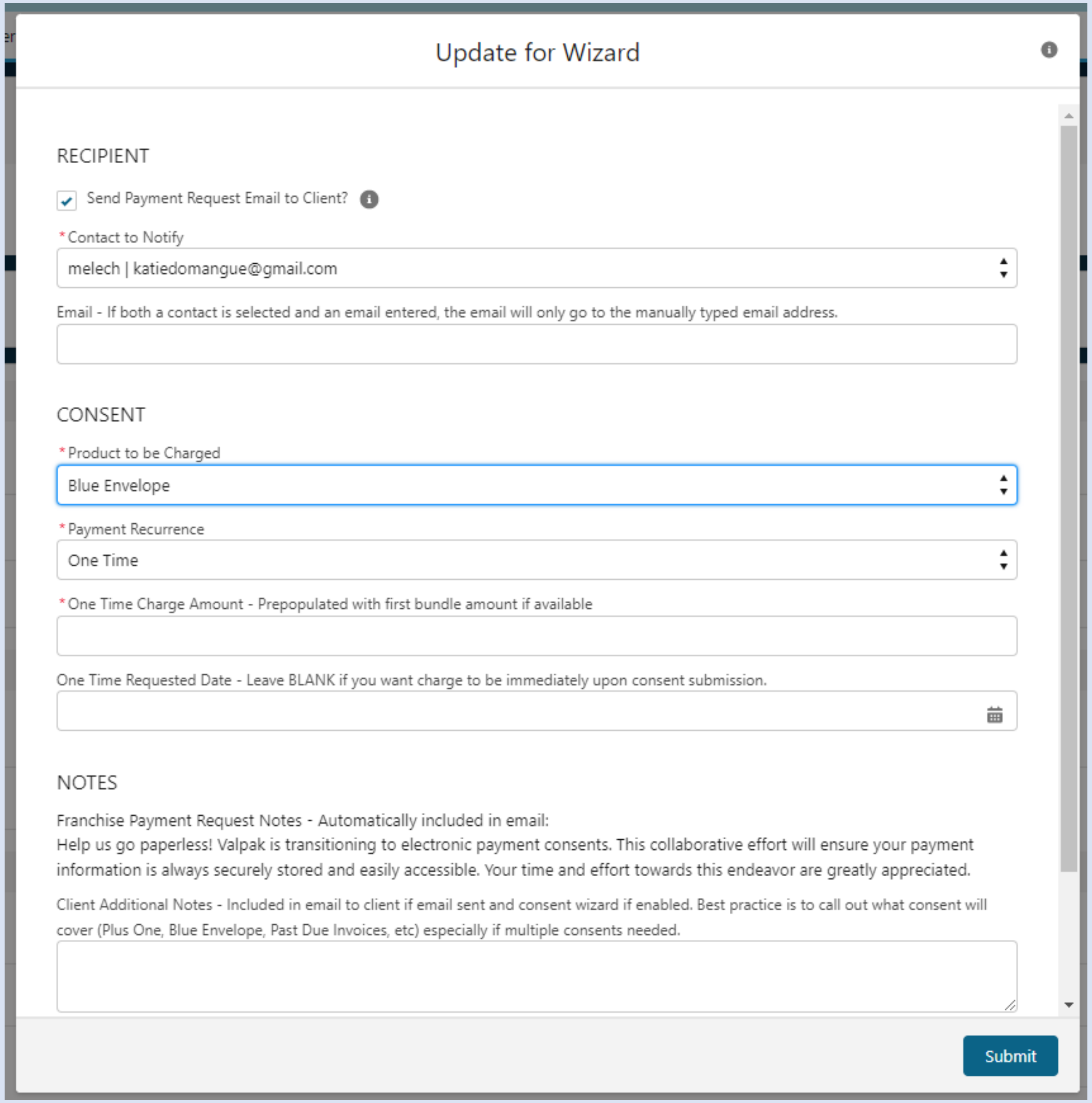
Time management is important. Once the Payment Request Link has been spun up, you have 30 days to complete it before the link expires. If you don't set it up in 30 days, a new payment request link will automatically generate the next morning. This isn't ideal because all old payment request stay on the record and could cause unwanted congestion.

If you are going to do paper check – tell the system to CANCEL this wizard process and provide the reason why. You're not ending the PAYMENT CONSENT; you're just telling the system that you're not using the credit card billing process. You will need to work with your RSA on how to process the ACH.

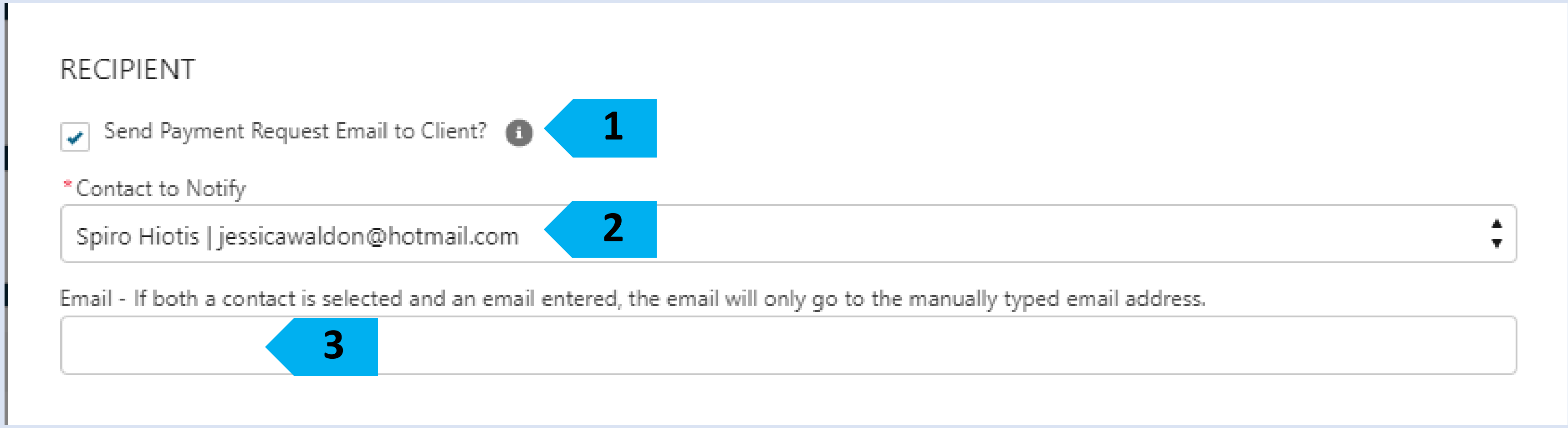
To set up the Payment Wizard, click on **Update for Wizard**.



UPDATE FOR WIZARD

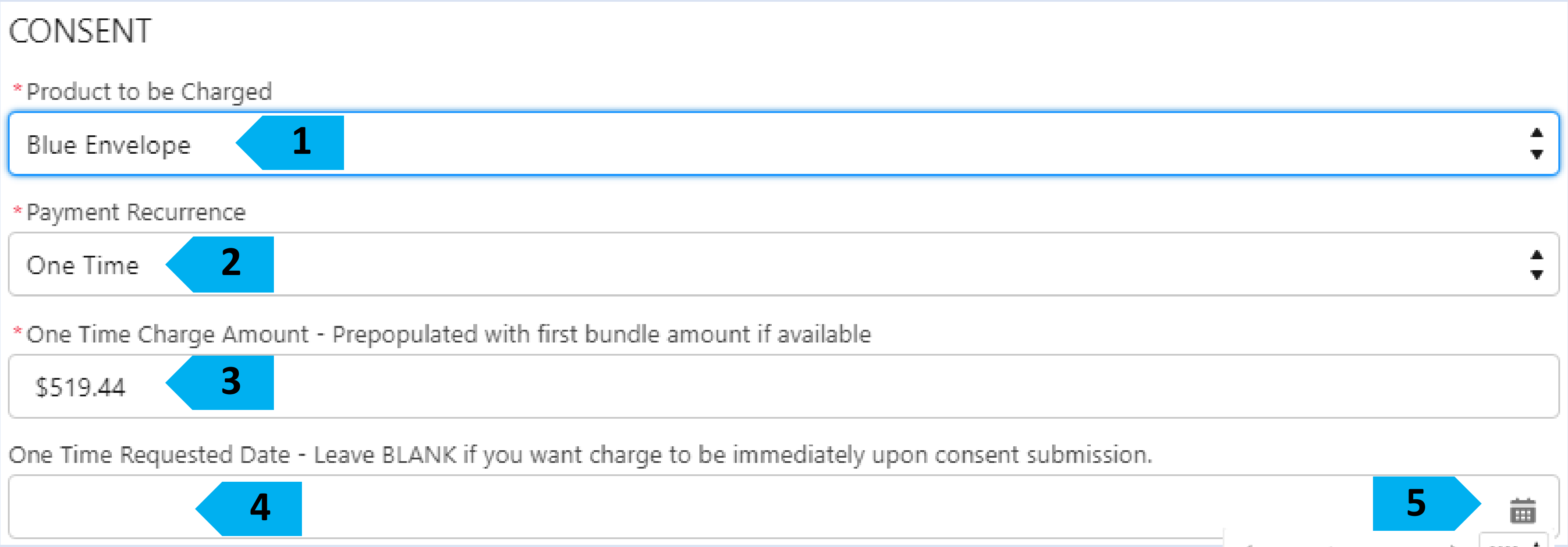


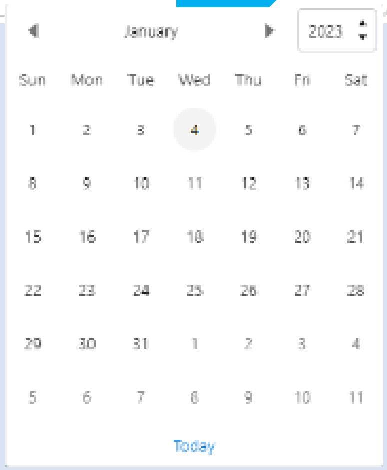
UPDATE FOR WIZARD: RECIPIENT



Recipient:
1. Send Payment Request Email to Client? Leave this box checked so the Client will get the payment consent form.
2. Contact to Notify - Choose the Contact associated to the Account Record you want to send the email to.
3. Email - If the client wants us to send this email to an address that is not listed, you can manually enter it in here. NOTE that if you enter in an email here, it will over-ride the contact in the above box.

UPDATE FOR WIZARD: CONSENT – ONE TIME





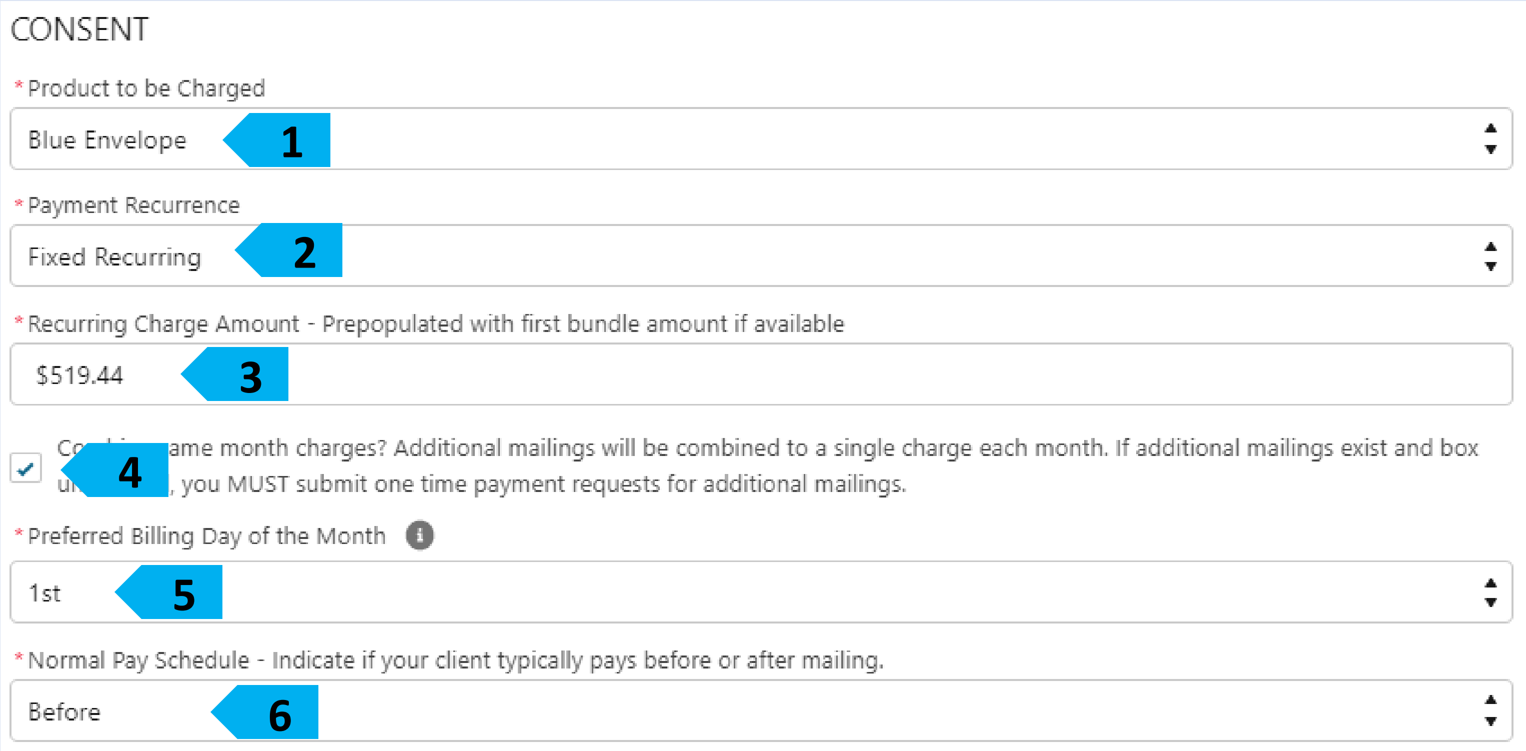
Consent:

1. <u>Product to be Charged</u> – Helps billing know what product to charge for. Blue Envelope, Digital, LE, Plus One, SOLO, Other, All
2. <u>Payment Recurrence</u> – One Time – If you have a 6month contract, but only have one time payment, this form will need to be filled out for month 2,3,4,5,6.
3. <u>One Time Charge Amount</u> – This will automatically populate with the 1st bundle amount if available.
4. <u>One Time Requested Date</u> –Blank charge immediately.
5. Select the calendar and choose the date the client would like their card to run on.

UPDATE FOR WIZARD: CONSENT – FIXED RECURRING

Consent:

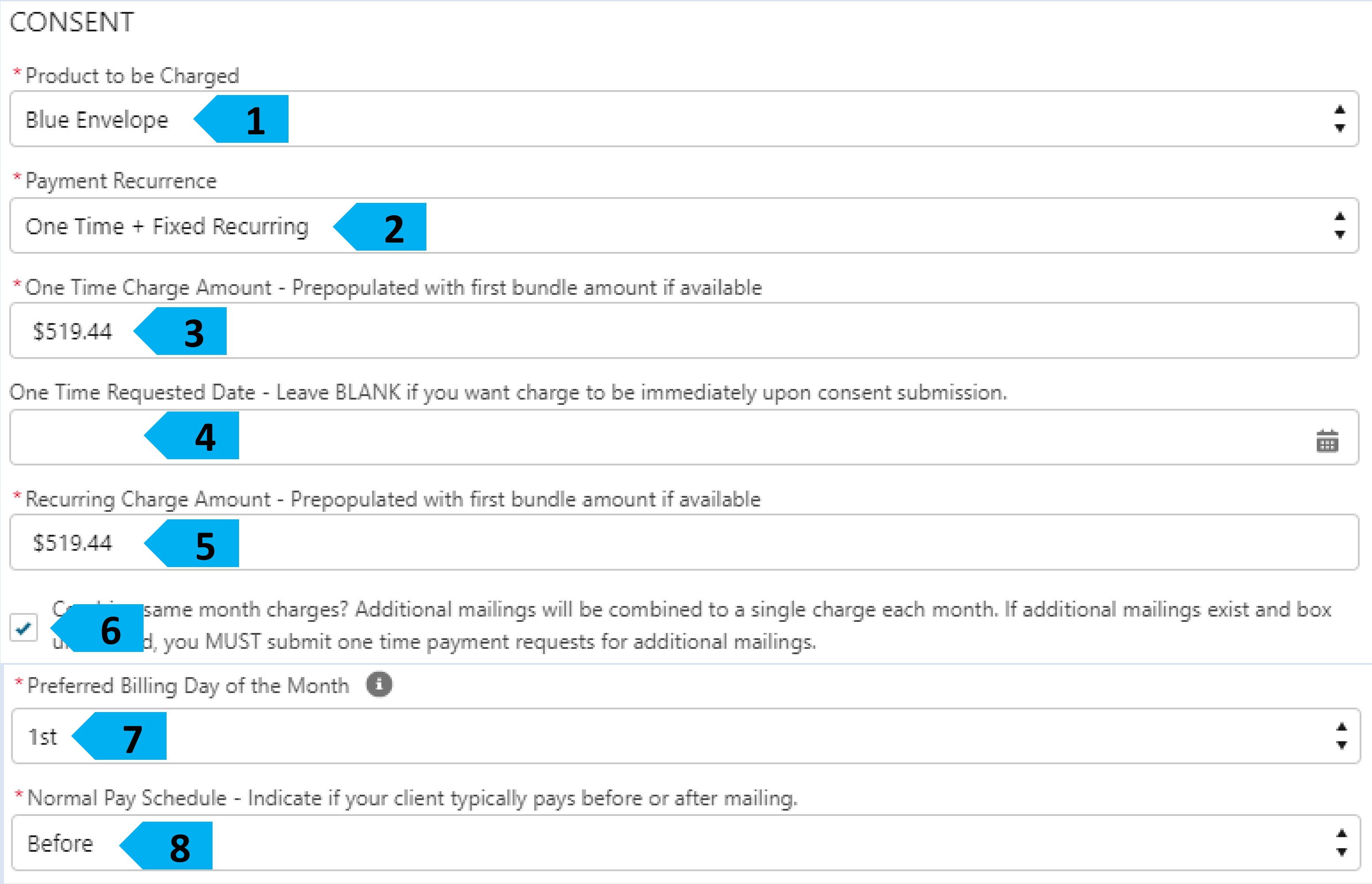
1. Product to be Charged – Helps billing know what product to charge for. Blue Envelope, Digital, LE, Plus One, SOLO, Other, All
2. Payment Recurrence – Fixed Recurring
3. Recurring Charge Amount – This will automatically populate with the 1st bundle amount if available. You may want to suggest to your client to combine same month charges, so you don't have to create a onetime payment request for them.
4. Combine Same Month Charges – If there are multiple mailings in a month, the client can choose to pay them both at the same time or separately.
5. Preferred Billing Day of the Month –Select which day of the month the client wants their CC charged. If it falls on the 31st and there are only 30 days that month, it will run on the 30th.
6. Normal Pay Schedule – Do they normally pay BEFORE or AFTER mailing.



UPDATE FOR WIZARD: CONSENT – ONE TIME + FIXED RECURRING

Consent:

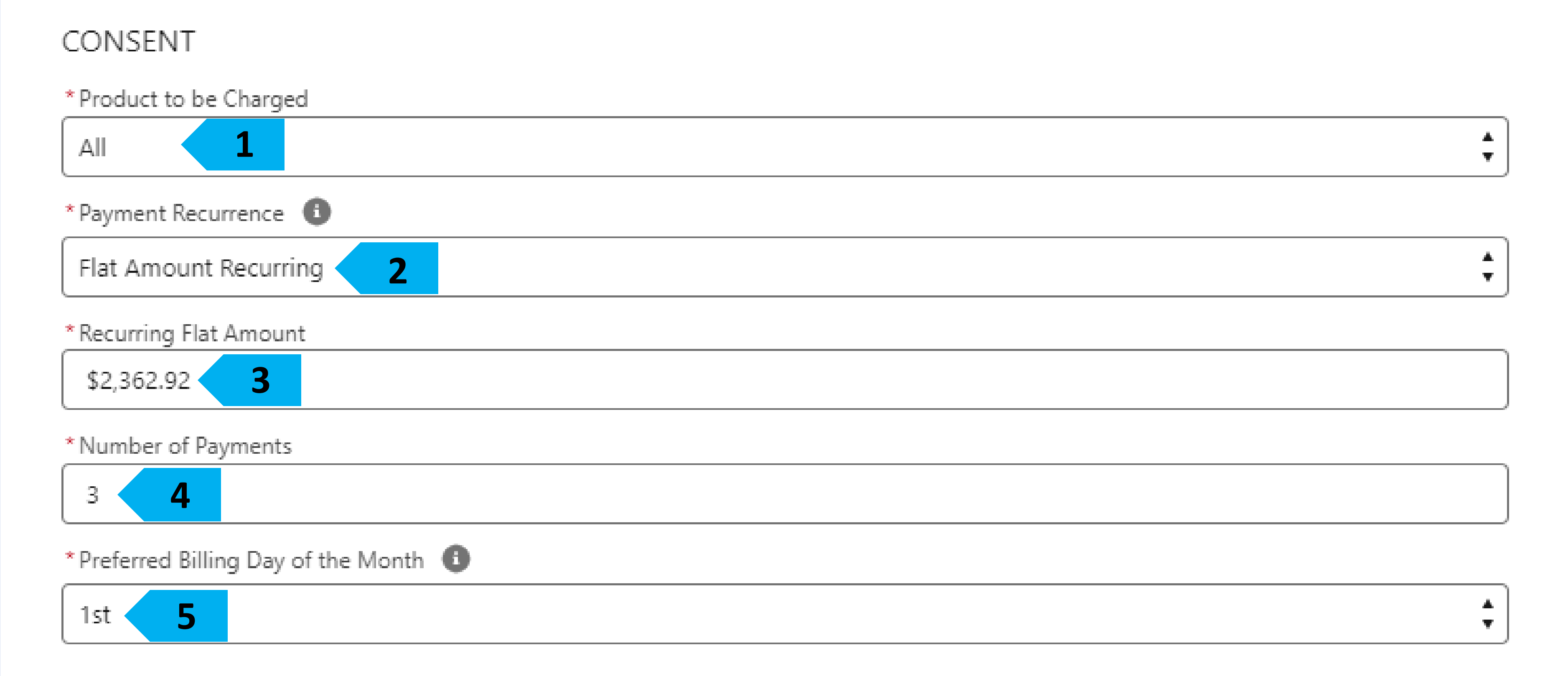
1. Product to be Charged – Helps billing know what product to charge for. Blue Envelope, Digital, LE, Plus One, SOLO, Other, All
2. Payment Recurrence – One Time + Fixed Recurring
3. One Time Charge Amount – This will automatically populate with the 1st bundle amount if available. This is used when you want to collect a deposit for a large quote or if you need to catch the client up on a payment.
4. One Time Requested Date – Blank charge immediately. Select the calendar and choose the date the client would like their card to run on.
5. Recurring Charge Amount – This will automatically populate with the 1st bundle amount if available. You may want to suggest to your client to combine same month charges, so you don't have to create a one-time payment request for them.
6. Combine Same Month Charges – If there are multiple mailings in a month, the client can choose to pay them both at the same time or separately.
7. Preferred Billing Day of the Month – Select which day of the month the client wants their CC charged. If it falls on the 31st and there are only 30 days that month, it will run on the 30th.
8. Normal Pay Schedule – Do they normally pay BEFORE or AFTER mailing.



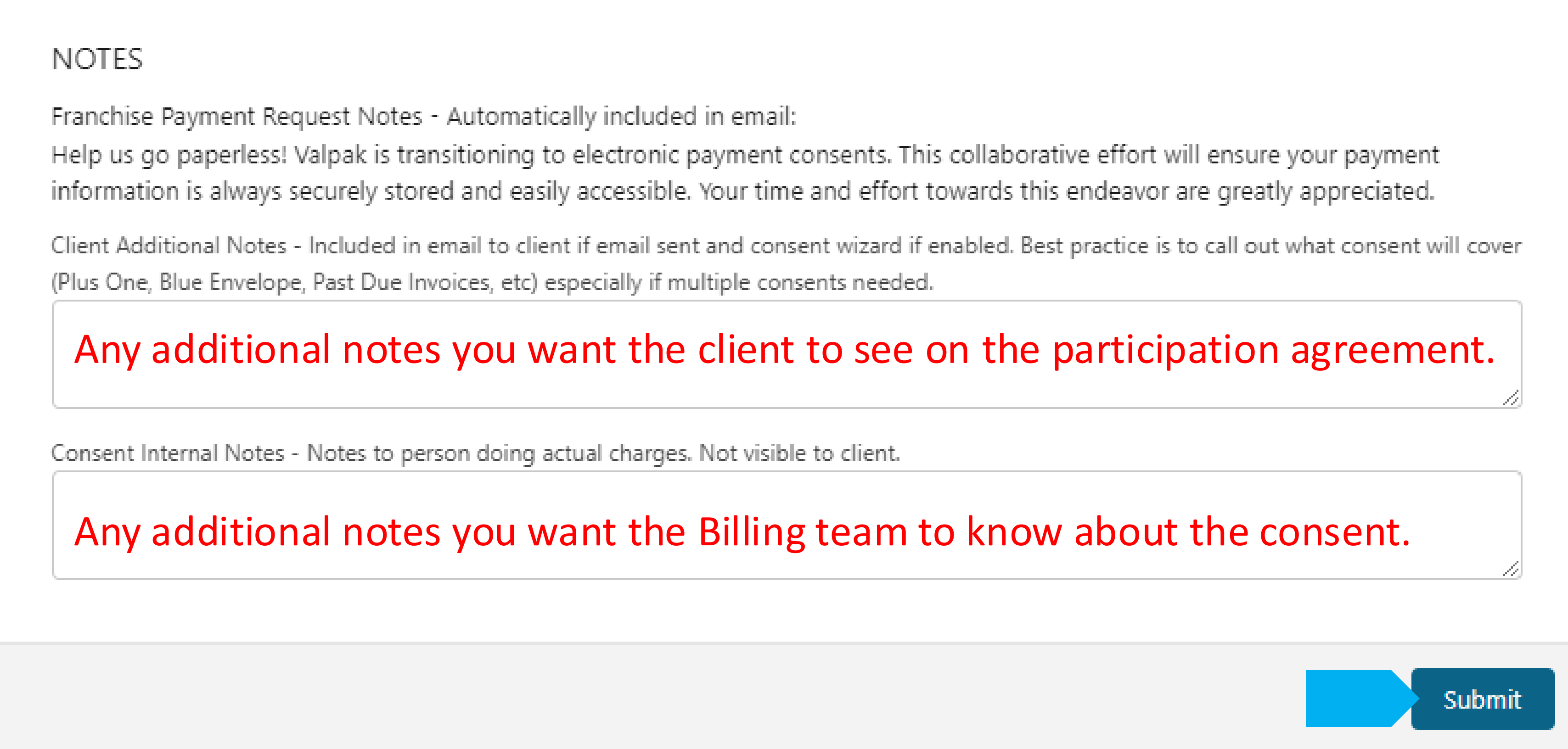
UPDATE FOR WIZARD: CONSENT – FLAT AMOUNT RECURRING

Consent:

1. Product to be Charged – Helps billing know what product to charge for. Blue Envelope, Digital, LE, Plus One, SOLO, Other, All
2. Payment Recurrence – Flat Amount Recurring
3. Recurring Flat Amount – Enter in the flat rate the client is going to pay
4. Number of Payments – How many payments does the client want to set this flat amount for.
5. Preferred Billing Day of the Month –Select which day of the month the client wants their CC charged. If it falls on the 31^{st} and there are only 30 days that month, it will run on the 30^{th}.



UPDATE FOR WIZARD: NOTES



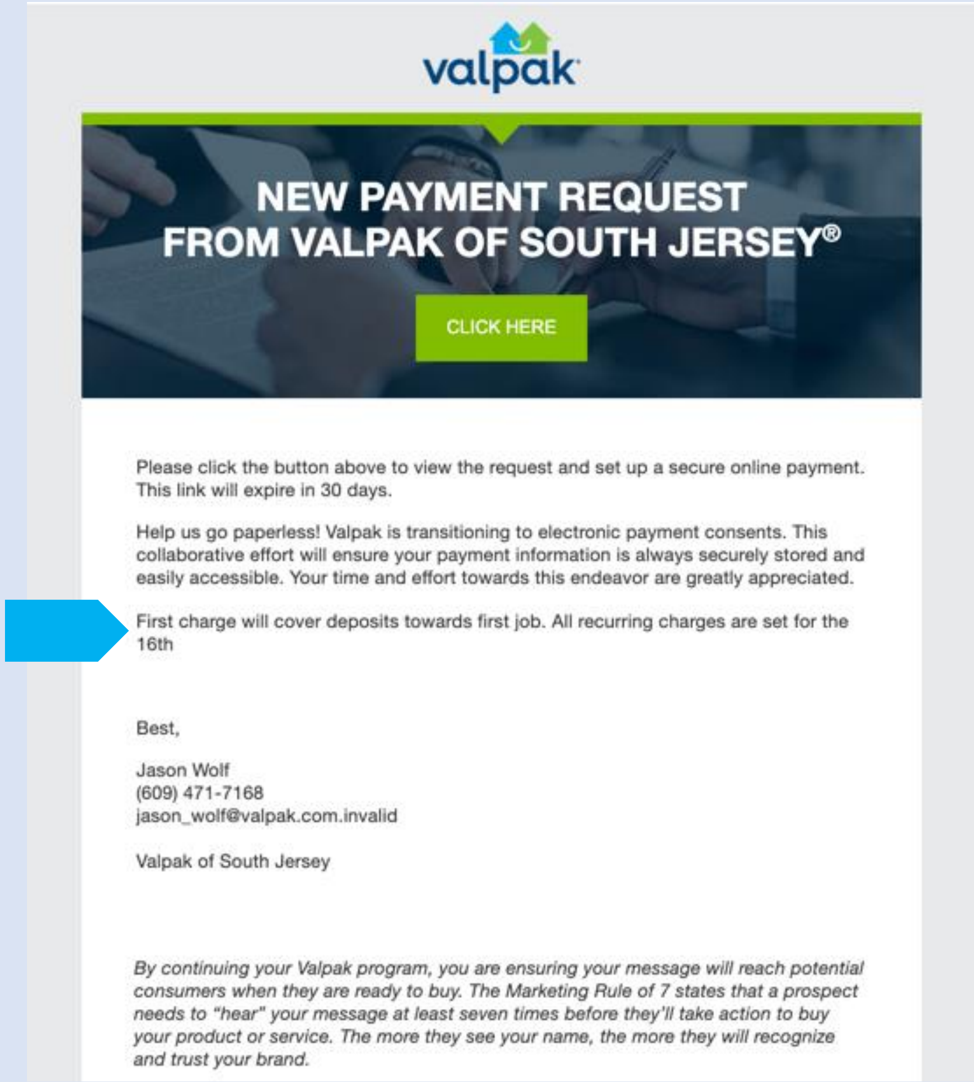
Notes:

1. Client Addition Notes – Enter in any information you want to show on the payment wizard email that goes to the client.
2. Consent Internal Notes – Any additional information that you may need to relay to the billing team
3. Click SUBMIT.

PAYMENT CONSENT

EMAIL TO CLIENT

This is what the client gets in the email for payment consent. Your Client notes that were added on the Quote record page will display here.



NEW PAYMENT REQUEST FROM VALPAK OF SOUTH JERSEY®

CLICK HERE

Please click the button above to view the request and set up a secure online payment. This link will expire in 30 days.

Help us go paperless! Valpak is transitioning to electronic payment consents. This collaborative effort will ensure your payment information is always securely stored and easily accessible. Your time and effort towards this endeavor are greatly appreciated.

First charge will cover deposits towards first job. All recurring charges are set for the 16th

Best,

Jason Wolf
(609) 471-7168
jason_wolf@valpak.com.invalid

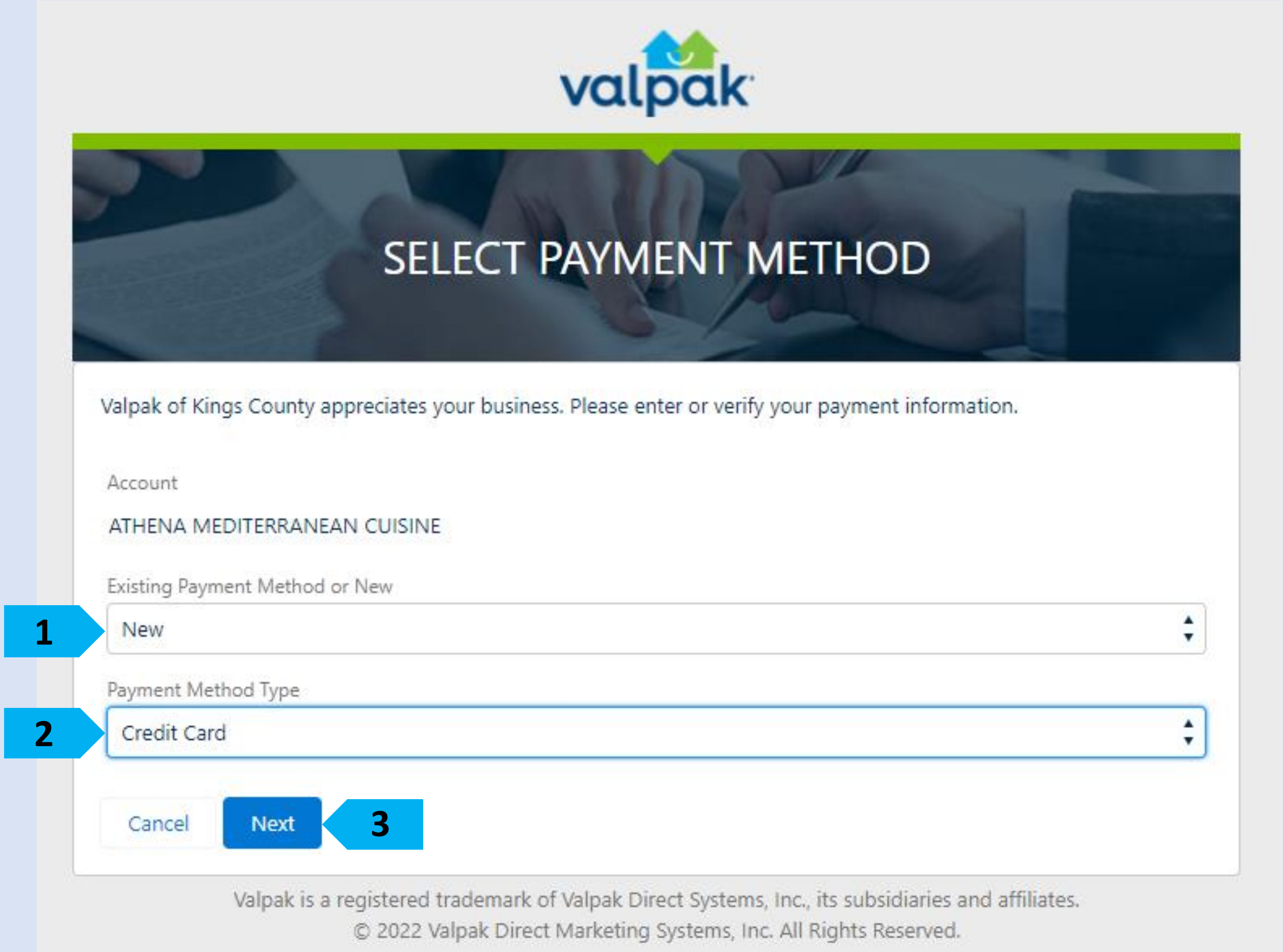
Valpak of South Jersey

By continuing your Valpak program, you are ensuring your message will reach potential consumers when they are ready to buy. The Marketing Rule of 7 states that a prospect needs to "hear" your message at least seven times before they'll take action to buy your product or service. The more they see your name, the more they will recognize and trust your brand.

PAYMENT METHOD

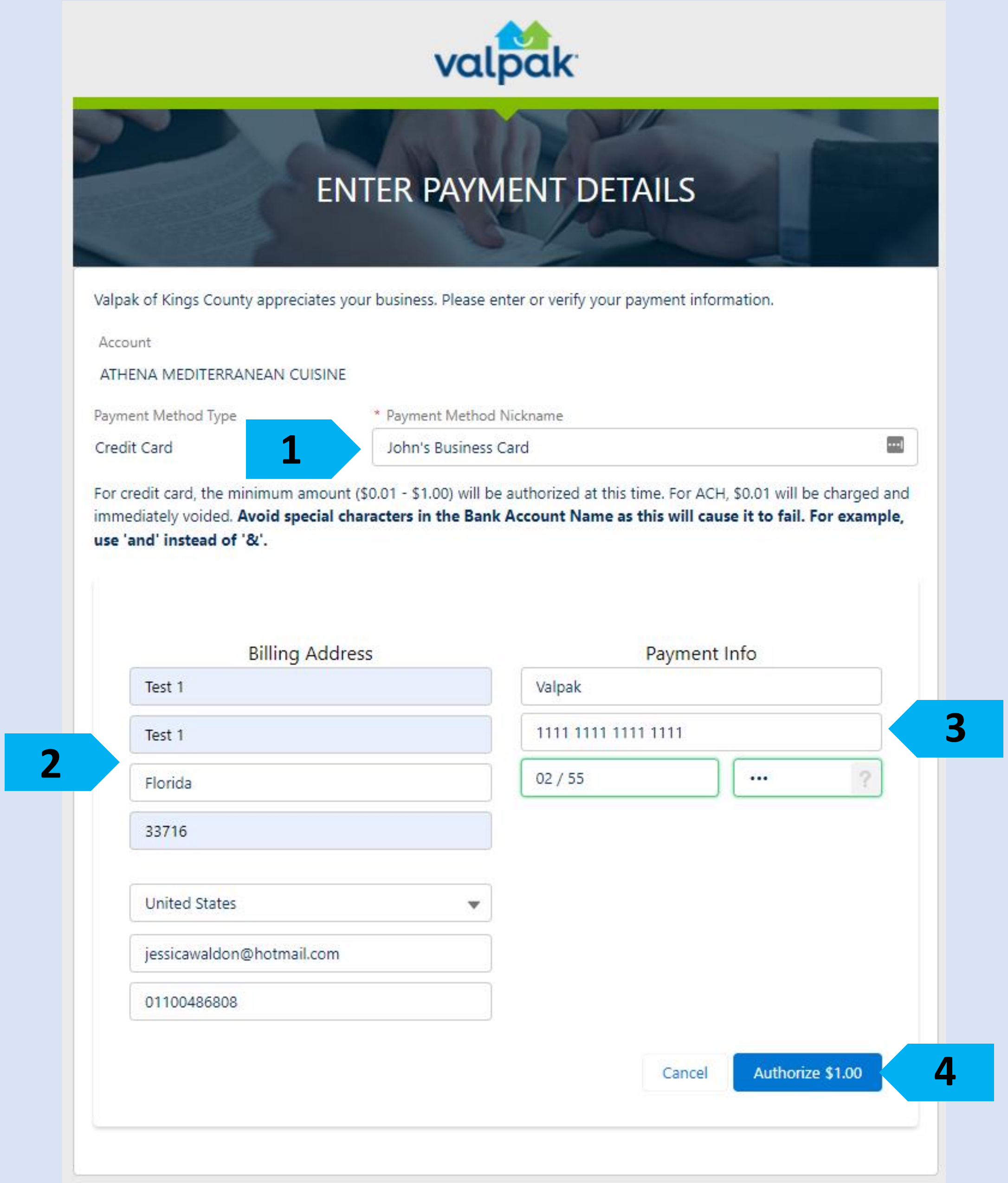
The next steps are informational so you can assist the client if they have questions on completing the payment request.

1. Existing Payment Method or New:
--Choose an existing CC or choose New.
2. Payment Method Type:
--CC – if they are using a CC.
--Bank Account – if they are going to provide their banking information.
3. Next



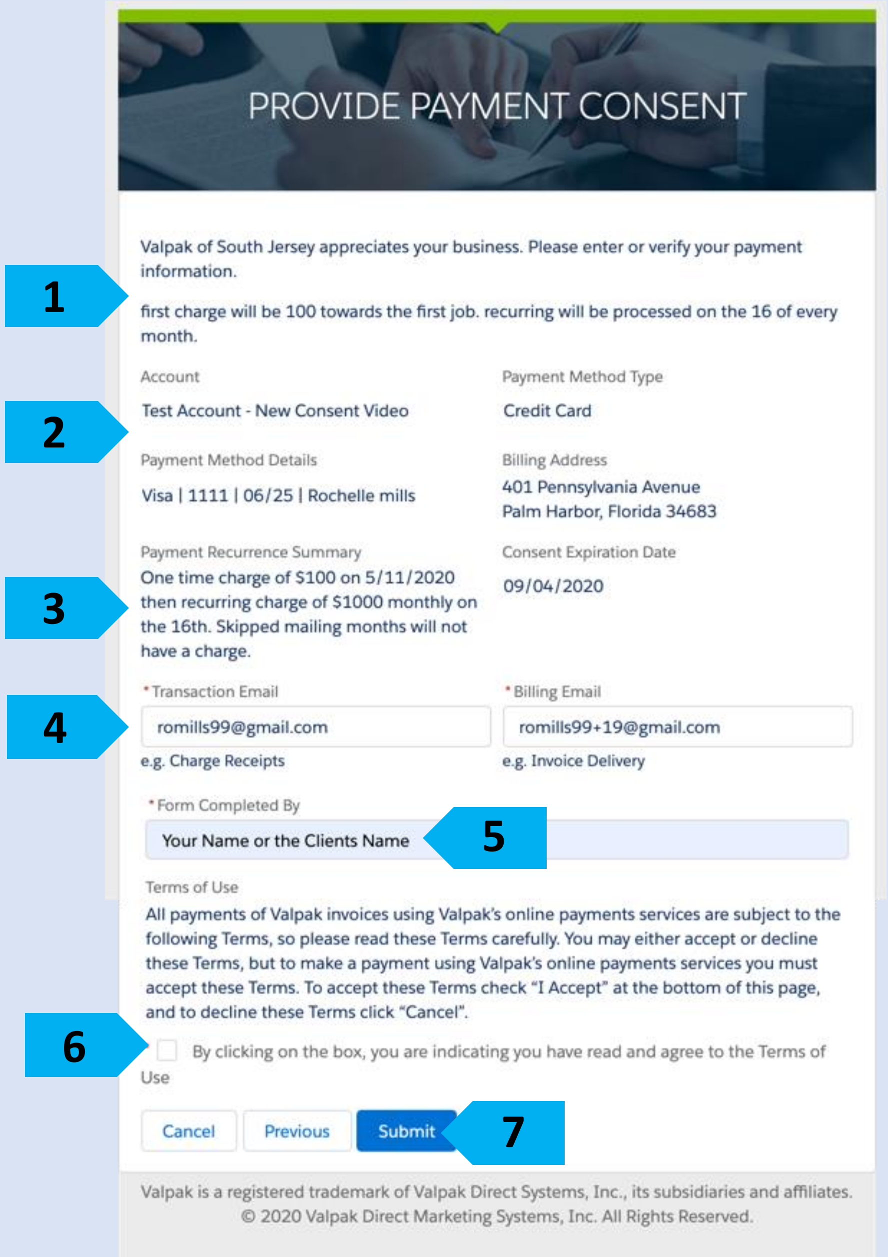
NEW PAYMENT METHOD

1. Payment Method Nickname – You want to give the CC a nickname. This will help if you have multiple CC's on file. Do NOT use the CC # as the Nickname.
2. Billing Address - Add the billing address for the CC.
3. Payment Info – Enter the information on the CC.
4. Authorize – Let the client know that this $1 will fall off after 24 hours. It's just to confirm that the CC will allow charges to be made.



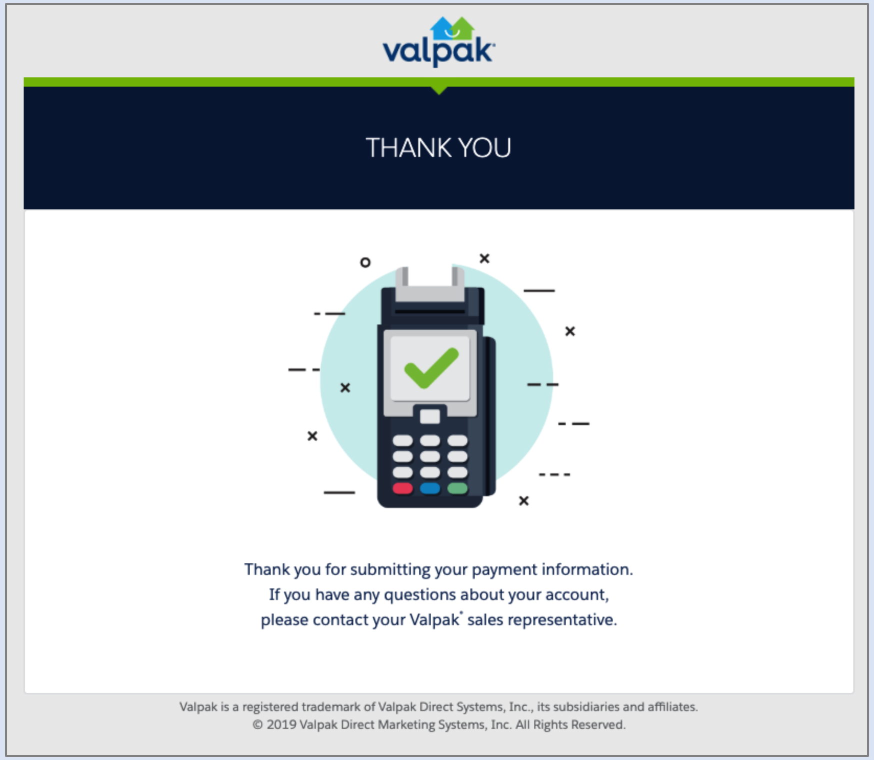
PAYMENT CONSENT

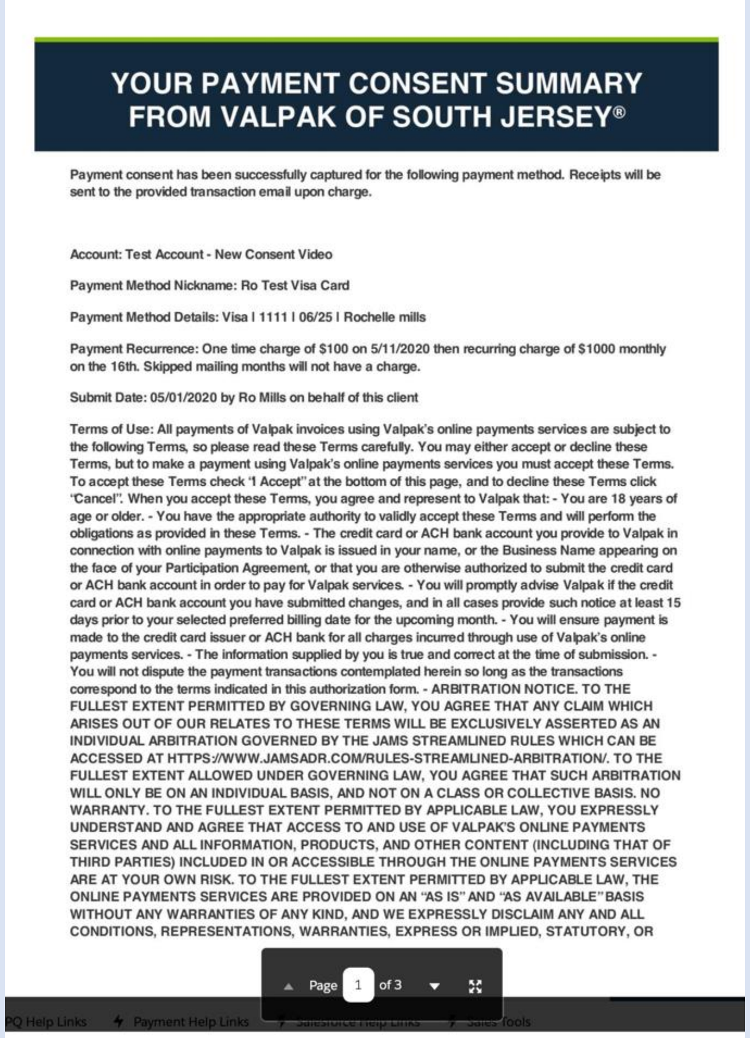
1. The top section on the Consent form thanks the client for their business and gives them information regarding their payments.
2. Billing Information – Confirm their Payment information is correct.
3. Recurrence Summary and when the Consent will end.
4. Transaction Email vs. Billing Email
5. Form Completed By – If you are filling this out on behalf of the client, you want to put your name + on behalf of client name. i.e John Doe on behalf of Sally Jones
6. Terms of Use – Read and accept the Terms of Use
7. Submit!



CONFIRMATION

The Client will receive a copy of the payment consent summary via email





YOUR PAYMENT CONSENT SUMMARY FROM VALPAK OF SOUTH JERSEY®

Payment consent has been successfully captured for the following payment method. Receipts will be sent to the provided transaction email upon charge.

Account: Test Account - New Consent Video

Payment Method Nickname: Ro Test Visa Card

Payment Method Details: Visa I 1111 I 06/25 I Rochelle mills

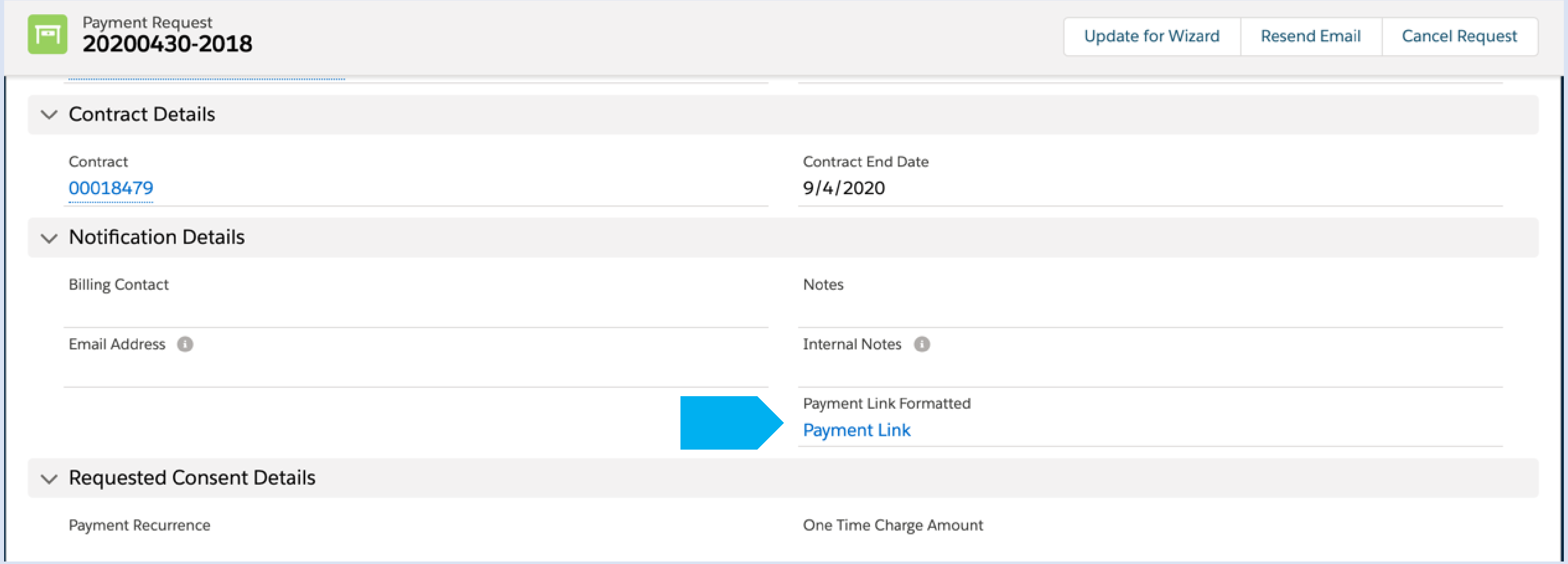
Payment Recurrence: One time charge of $100 on 5/11/2020 then recurring charge of $1000 monthly on the 16th. Skipped mailing months will not have a charge.

Submit Date: 05/01/2020 by Ro Mills on behalf of this client

Terms of Use: All payments of Valpak invoices using Valpak's online payments services are subject to the following Terms, so please read these Terms carefully. You may either accept or decline these Terms, but to make a payment using Valpak's online payments services you must accept these Terms. To accept these Terms check '1 Accept" at the bottom of this page, and to decline these Terms click "Cancel". When you accept these Terms, you agree and represent to Valpak that: - You are 18 years of age or older. - You have the appropriate authority to validly accept these Terms and will perform the obligations as provided in these Terms. - The credit card or ACH bank account you provide to Valpak in connection with online payments to Valpak is issued in your name, or the Business Name appearing on the face of your Participation Agreement, or that you are otherwise authorized to submit the credit card or ACH bank account in order to pay for Valpak services. - You will promptly advise Valpak if the credit card or ACH bank account you have submitted changes, and in all cases provide such notice at least 15 days prior to your selected preferred billing date for the upcoming month. - You will ensure payment is made to the credit card issuer or ACH bank for all charges incurred through use of Valpak's online payments services. - The information supplied by you is true and correct at the time of submission. - You will not dispute the payment transactions contemplated herein so long as the transactions correspond to the terms indicated in this authorization form. - ARBITRATION NOTICE. TO THE FULLEST EXTENT PERMITTED BY GOVERNING LAW, YOU AGREE THAT ANY CLAIM WHICH ARISES OUT OF OUR RELATES TO THESE TERMS WILL BE EXCLUSIVELY ASSERTED AS AN INDIVIDUAL ARBITRATION GOVERNED BY THE JAMS STREAMLINED RULES WHICH CAN BE ACCESSED AT HTTPS://WWW.JAMSADR.COM/RULES-STREAMLINED-ARBITRATION/. TO THE FULLEST EXTENT ALLOWED UNDER GOVERNING LAW, YOU AGREE THAT SUCH ARBITRATION WILL ONLY BE ON AN INDIVIDUAL BASIS, AND NOT ON A CLASS OR COLLECTIVE BASIS. NO WARRANTY. TO THE FULLEST EXTENT PERMITTED BY APPLICABLE LAW, YOU EXPRESSLY UNDERSTAND AND AGREE THAT ACCESS TO AND USE OF VALPAK'S ONLINE PAYMENTS SERVICES AND ALL INFORMATION, PRODUCTS, AND OTHER CONTENT (INCLUDING THAT OF THIRD PARTIES) INCLUDED IN OR ACCESSIBLE THROUGH THE ONLINE PAYMENTS SERVICES ARE AT YOUR OWN RISK. TO THE FULLEST EXTENT PERMITTED BY APPLICABLE LAW, THE ONLINE PAYMENTS SERVICES ARE PROVIDED ON AN "AS IS" AND "AS AVAILABLE" BASIS WITHOUT ANY WARRANTIES OF ANY KIND, AND WE EXPRESSLY DISCLAIM ANY AND ALL CONDITIONS, REPRESENTATIONS, WARRANTIES, EXPRESS OR IMPLIED, STATUTORY, OR

Page 1 of 3

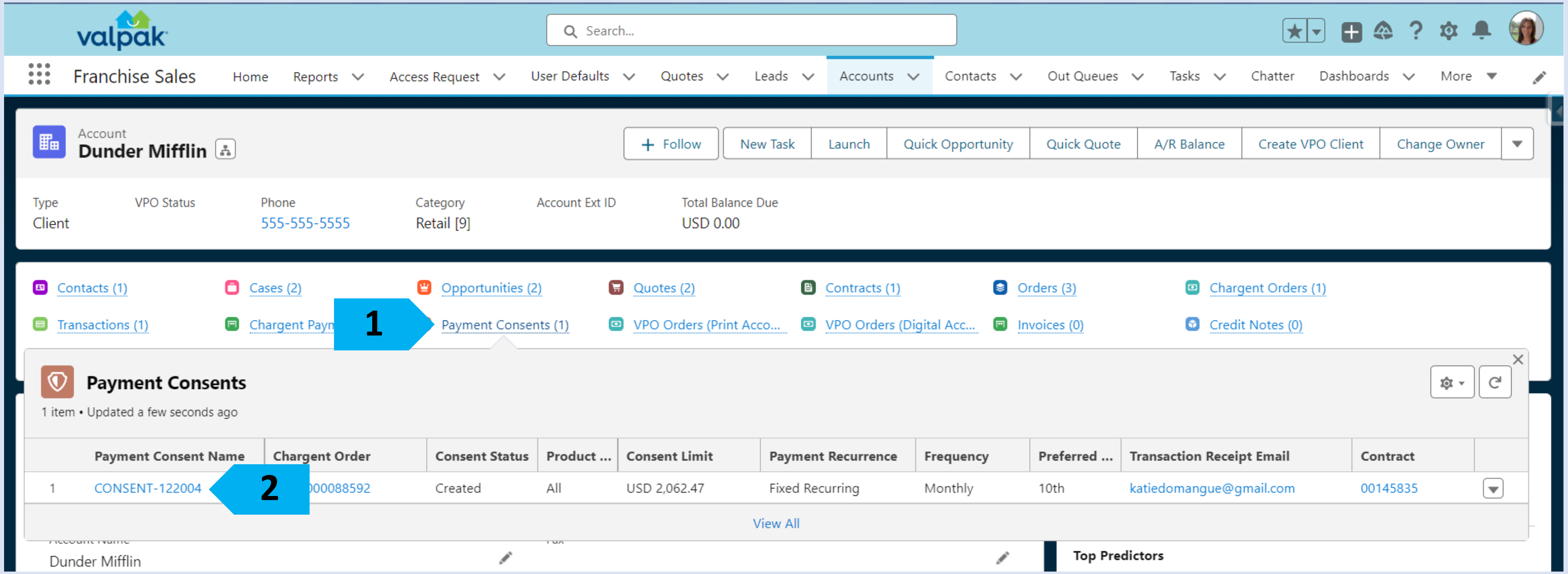
ACCESS TO THE PAYMENT LINK



You have access to the payment link if needed.

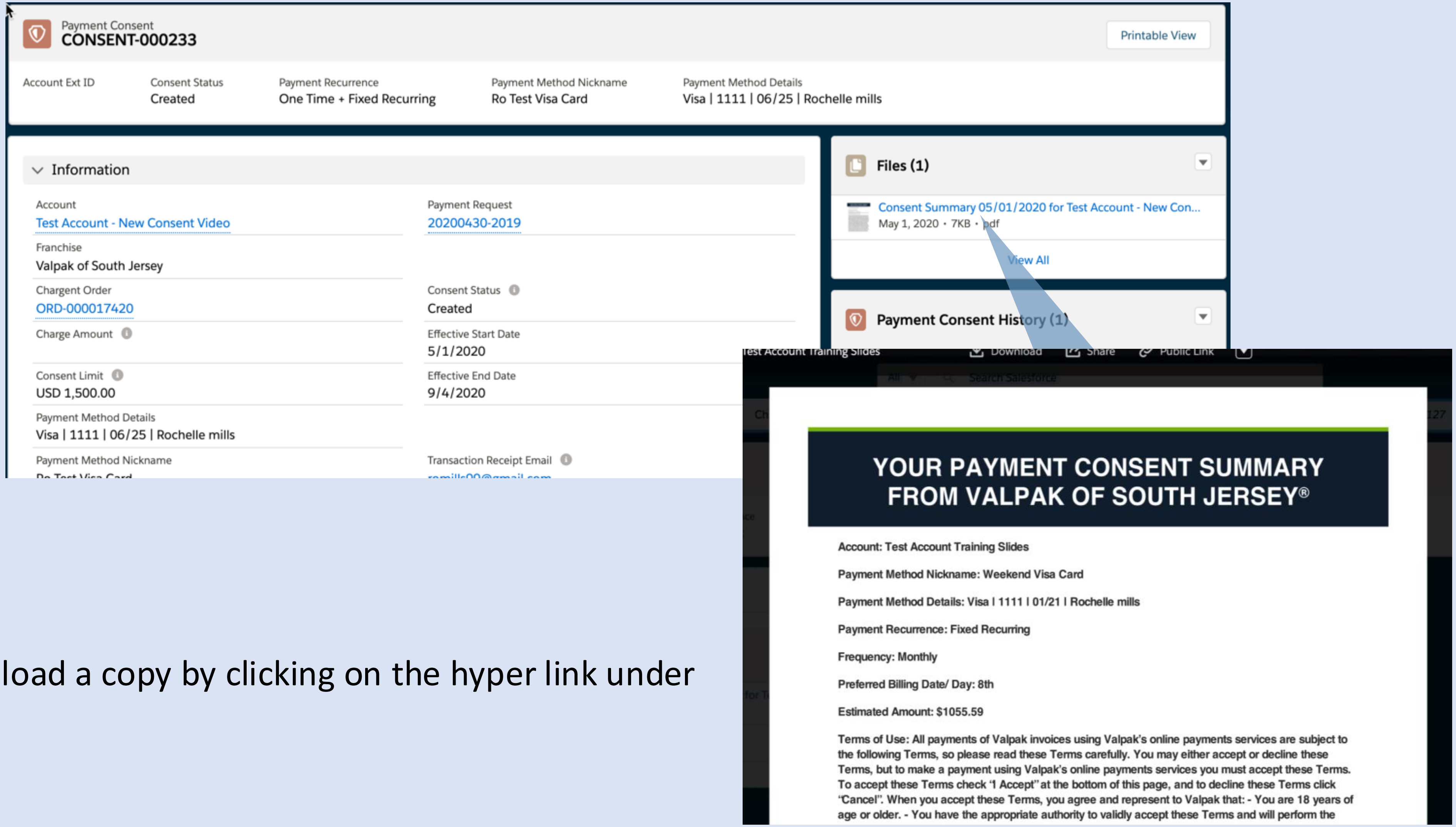
POST PAYMENT CONSENT

FINDING PAYMENT CONSENT



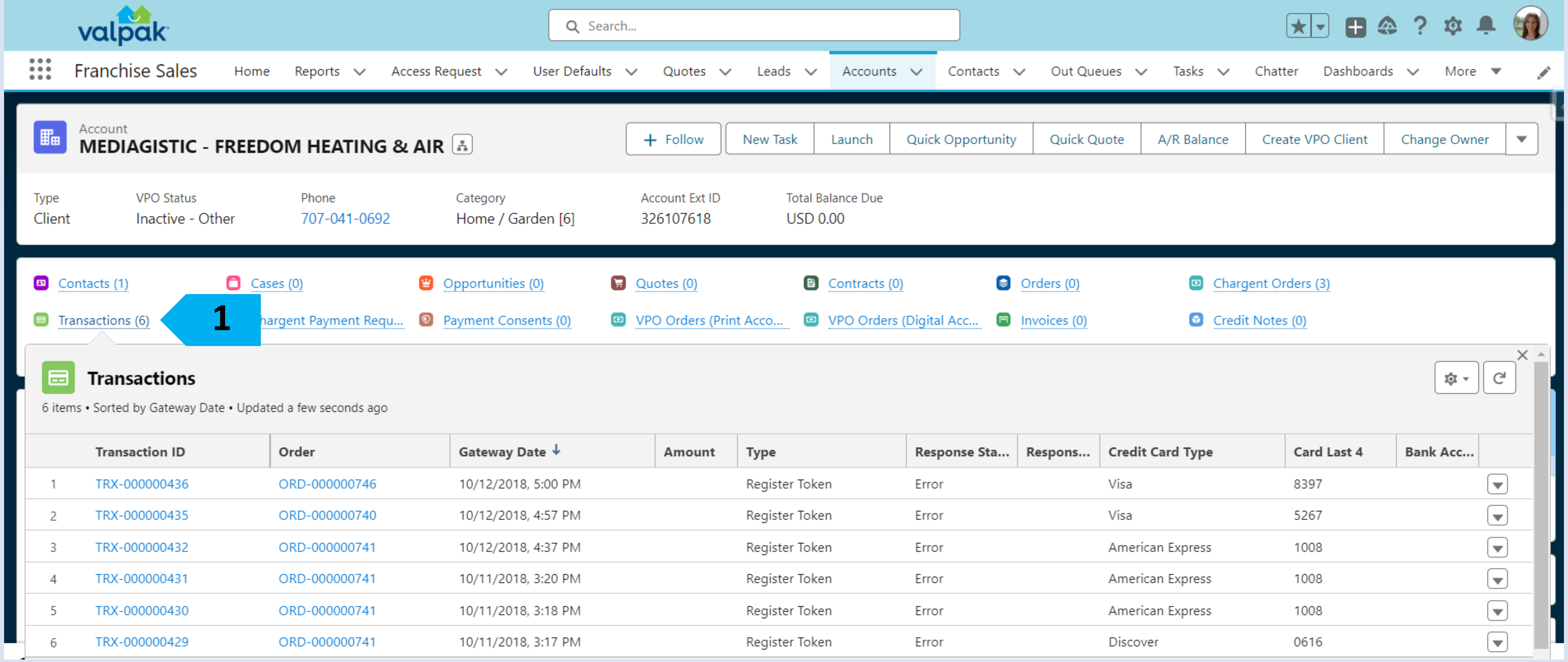
If you need to send the Client a copy of the signed agreement, a carbon copy of the consent record is visible in Salesforce. Hover over Payment Consent and click on the consent you need to send the client.

SEND COPY OF PAYMENT CONSENT



You can download a copy by clicking on the hyper link under Files.

TRANSACTION HISTORY



On the Account Record, you can find the transaction history for the client.

Looking for a specific date or type? You can filter the list by any column that appears.