

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

Quote Document
Q-333653-20220419-1500

Agreements (1) | Quote Document Histor... | Files (0)

Agreements
1 item • Updated a few seconds ago

<input type="checkbox"/>	Agreement Name	Status	Account Name	Agreement Status	Document	Date Sent (Date)	Date Vie...	Date Sig...	Days Unsign...	Quote
1	<input type="checkbox"/> Q-333653-20220419-1500	Out for Signature	DUNDEE'S (EA-223)	Out for Signature	Q-333653-20220419-1500.pdf	4/19/2022			0.00	Q

View All

QUOTE

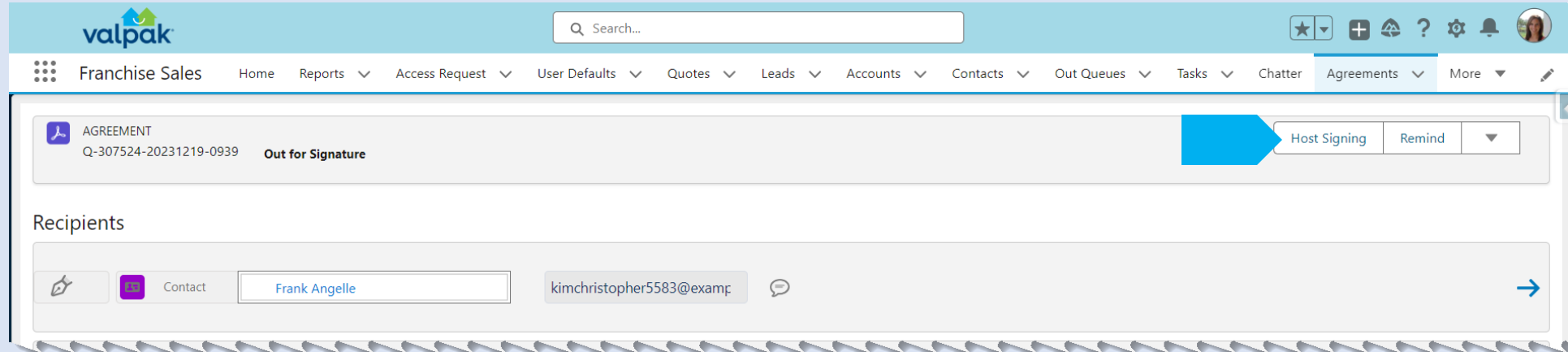
Q-34428

Edit

Edit

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

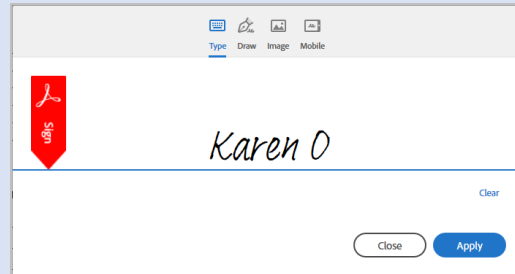


Next, it's going to open the agreement document, and you're going to click HOST SIGNING. That will open the document for client signature.

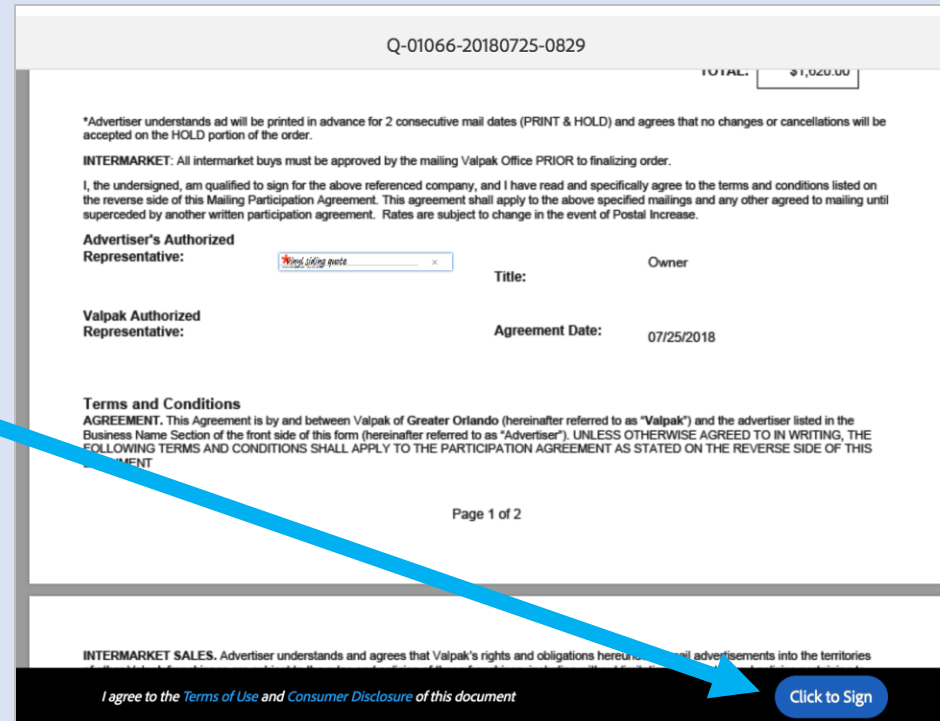
Then you go back to the agreement, edit, click HOST SIGNING, and now YOU sign on your signature line, apply and sign.

THIS DOES NOT ELIMINATE 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



A digital handwriting interface. At the top, there are icons for 'Type', 'Draw', 'Image', and 'Mobile'. Below these is a red vertical bar with a white signature icon. The main area contains the handwritten signature 'Karen O'. To the right of the signature is a 'Clear' link. At the bottom, there are two buttons: 'Close' and 'Apply'.



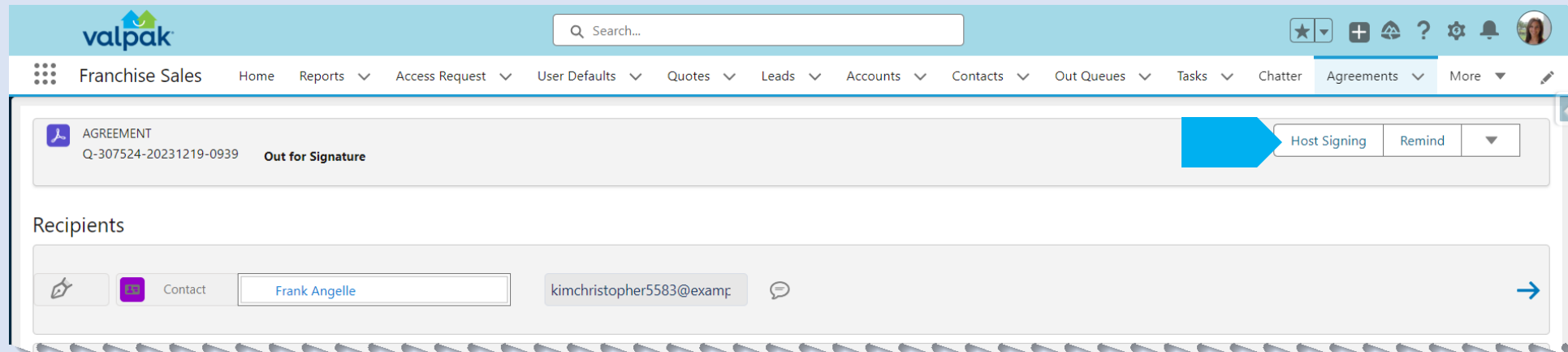
A screenshot of a Mailing Participation Agreement form. At the top, the order number 'Q-01066-20180725-0829' is displayed. Below it, the total amount is shown as '\$1,020.00'. The form contains several sections of text and fields:

- *Advertiser understands ad will be printed in advance for 2 consecutive mail dates (PRINT & HOLD) and agrees that no changes or cancellations will be accepted on the HOLD portion of the order.**
- INTERMARKET:** All intermarket buys must be approved by the mailing Valpak Office PRIOR to finalizing order.
- A paragraph stating: "I, the undersigned, am qualified to sign for the above referenced company, and I have read and specifically agree to the terms and conditions listed on the reverse side of this Mailing Participation Agreement. This agreement shall apply to the above specified mailings and any other agreed to mailing until superceded by another written participation agreement. Rates are subject to change in the event of Postal Increase."
- Advertiser's Authorized Representative:** A dropdown menu with 'Wind Viking quote' selected, and a 'Title:' field with 'Owner' entered.
- Valpak Authorized Representative:** A field for the representative's name and an 'Agreement Date:' field with '07/25/2018' entered.
- Terms and Conditions** section with the text: "AGREEMENT. This Agreement is by and between Valpak of Greater Orlando (hereinafter referred to as 'Valpak') and the advertiser listed in the Business Name Section of the front side of this form (hereinafter referred to as 'Advertiser'). UNLESS OTHERWISE AGREED TO IN WRITING, THE FOLLOWING TERMS AND CONDITIONS SHALL APPLY TO THE PARTICIPATION AGREEMENT AS STATED ON THE REVERSE SIDE OF THIS AGREEMENT."
- Page number: "Page 1 of 2"
- At the bottom, there is a section for **INTERMARKET SALES** and a checkbox for "I agree to the Terms of Use and Consumer Disclosure of this document".

A blue arrow points from the 'Apply' button in the handwriting interface to the 'Click to Sign' button at the bottom right of the agreement form.

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

Handwritten signature: Karen O

Buttons: Close, Apply

Q-01066-20180725-0829

TOTAL: \$1,020.00

*Advertiser understands ad will be printed in advance for 2 consecutive mail dates (PRINT & HOLD) and agrees that no changes or cancellations will be accepted on the HOLD portion of the order.

INTERMARKET: All intermarket buys must be approved by the mailing Valpak Office PRIOR to finalizing order.

I, the undersigned, am qualified to sign for the above referenced company, and I have read and specifically agree to the terms and conditions listed on the reverse side of this Mailing Participation Agreement. This agreement shall apply to the above specified mailings and any other agreed to mailing until superceded by another written participation agreement. Rates are subject to change in the event of Postal increase.

Advertiser's Authorized Representative: Title: Owner

Valpak Authorized Representative: Agreement Date: 07/25/2018

Terms and Conditions
AGREEMENT. This Agreement is by and between Valpak of Greater Orlando (hereinafter referred to as "Valpak") and the advertiser listed in the Business Name Section of the front side of this form (hereinafter referred to as "Advertiser"). UNLESS OTHERWISE AGREED TO IN WRITING, THE FOLLOWING TERMS AND CONDITIONS SHALL APPLY TO THE PARTICIPATION AGREEMENT AS STATED ON THE REVERSE SIDE OF THIS DOCUMENT

Page 1 of 2

INTERMARKET SALES. Advertiser understands and agrees that Valpak's rights and obligations hereunder shall apply to all advertisements into the territories

I agree to the Terms of Use and Consumer Disclosure of this document

Click to Sign

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

valpak

Franchise Sales Home Reports Access Request User Defaults Quotes Leads Accounts Contacts Out Queues Tasks **Agreements** More

Agreements Recently Viewed

11 items • Updated a few seconds ago

Import Send Reminder Cancel Agreement Send Agreement Update Agreement

Search this list...

	Agreement Name	Status	Account Name	Agreement Status	Date Sen...	Date Viewed (Date)	Date Sig...	Days...	Quote	Created Date
1	Q-307524-20231219-0939	Out for Signature	KOLACHE FACTORY / E...	Out for Signature	12/19/2023			0.19	Q-307524	12/19/2023, 9:39 A...
2	2022 Agreement	Expired	KOLACHE FACTORY / E...	Expired	1/3/2022	1/12/2022		714.93	Q-307524	1/3/2022, 3:50 PM
3	Q-395568-20231206-1013	Client Accepted		Client Accepted	12/6/2023			13.16		12/6/2023, 10:13 A...
4	Q-395577-20231211-1149	Signed	Dunder Mifflin	Signed	12/12/2023	12/12/2023	12/12/2023	0.00	Q-395577	12/11/2023, 11:50 ...
5	Q-395555-20231130-1450	Signed		Signed	11/30/2023		11/30/2023	0.00		11/30/2023, 2:59 PM

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.

valpak

Franchise Sales Home Reports Access Request User Defaults **Quotes** Leads Accounts Contacts Out Queues Tasks Chatter Agreements More

Quote **Q-395988**

Edit Generate Document Cancel Quote Sharing

Account [Allison's Sports Center](#) Opportunity [Allison's Sports Center 00441153](#) Primary Contact [Allison Unknow](#) Primary Contact Email katiemelech@gmail.com Approval Status Approved Status Accepted

Quote Lines (10+) Quote Documents (1) **Agreements (1)** Contracts (1) Orders (1) Approvals (0) Quote History (10)

Launch Campaigns (0) Cases (0)

ADOBE SIGN

ADOBE EMAIL TO CLIENT

Adobe Acrobat Sign . Signature requested on "Q-395577-20231211-1149" - Katie Melech requests your signature on Q-395577-20231211-1149 Revi...

Signature requested on "Q-395577-20231211-1149" Inbox x

Adobe Acrobat Sign on behalf of Katie Melech <adobesign@adobesign.com>
to me

Mon, Dec 11, 2023

valpak

Katie Melech requests your signature on
Q-395577-20231211-1149

Review and sign

After you sign **Q-395577-20231211-1149**, the agreement will be sent to **Katie Melech**. Then, all parties will receive a final PDF copy by email.

Don't forward this email: [\[redacted\]](#)

Q-01066-20180725-0829

*Advertiser understands ad will be printed in advance for 2 consecutive mail dates (PRINT & HOLD) and agrees that no changes or cancellations will be accepted on the HOLD portion of the order.
INTERMARKET: All intermarket buys must be approved by the mailing Valpak Office PRIOR to finalizing order.
I, the undersigned, am qualified to sign for the above referenced company, and I have read and specifically agree to the terms and conditions listed on the reverse side of this Mailing Participation Agreement. This agreement shall apply to the above specified mailings and any other agreed to mailing until superseded by another written participation agreement. Rates are subject to change in the event of Postal increase.
Advertiser's Authorized Representative: Title: Owner
Valpak Authorized Representative: Agreement Date: 07/25/2018

Terms and Conditions
AGREEMENT. This Agreement is by and between Valpak of Greater Orlando (hereinafter referred to as "Valpak") and the advertiser listed in the Business Name Section of the front side of this document (hereinafter referred to as "Advertiser"). UNLESS OTHERWISE AGREED TO IN WRITING, THE FOLLOWING TERMS AND CONDITIONS SHALL APPLY TO THE PARTICIPATION AGREEMENT AS STATED ON THE REVERSE SIDE OF THIS DOCUMENT.

INTERMARKET SALES. Advertiser understands and agrees that Valpak's rights and obligations hereunder to mail advertising into the territories

Agree to the Terms of Use and Consumer Disclosure of this document **Click to Sign**

- 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

A

Adobe Sign



Q-395577-202...

Tue 12/12

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.



PARTICIPATION AGREEMENT

Valpak of Training
802 Executive Center Dr
Saint Petersburg, FL 33702
Office: 727-285-0249
Fax: 727-285-0245

Agreement #: Q-34013-1
Created Date: 05/05/2019
Printing Expires: 05/18/2019
Sales Contract: CRM 0002

Business Name: Prospect Test Account 2
Address: 802 Executive Dr
City: St Petersburg
State/ZIP: FL 33702
Telephone: 727-285-2611

Contact: Ft Test
Title:
Email: romills99@gmail.com
Cell:
Fax:

Date	Product	Quantity	Unit Price	Total
08/13/2019	Single Panel Insert w/Digital - Single Panel Insert 3 (S&B) - The Successor (08/13/2019) CA, OR - Training (08/13/2019) GNC, GC - Call Tracking	1	45.00	\$1,485.00
01/02/2019	Single Panel Insert w/Digital - Single Panel Insert 3 (S&B) - The Successor (01/02/2019) CA, OR - Training (01/02/2019) GNC, GC - Call Tracking	1	45.00	\$1,485.00
08/19/2019	Single Panel Insert w/Digital - Single Panel Insert 3 (S&B) - The Successor (08/19/2019) CA, OR - Training (08/19/2019) GNC, GC - Call Tracking	1	45.00	\$1,485.00
08/19/2019	Single Panel Insert w/Digital - Single Panel Insert 3 (S&B) - The Successor (08/19/2019) CA, OR - Training (08/19/2019) GNC, GC - Call Tracking	1	45.00	\$1,485.00
10/01/2019	Single Panel Insert w/Digital - Single Panel Insert 3 (S&B) - The Successor (10/01/2019) CA, OR - Training (10/01/2019) GNC, GC - Call Tracking	1	45.00	\$1,485.00
11/18/2019	Single Panel Insert w/Digital - Single Panel Insert 3 (S&B) - The Successor (11/18/2019) CA, OR - Training (11/18/2019) GNC, GC - Call Tracking	1	45.00	\$1,485.00

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

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.

STATUS UPDATED

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

The screenshot displays a CRM interface for a quote. At the top, the quote is identified as 'Quote Q-395577'. Below this, a summary row lists key information: Account (Dunder Mifflin), Opportunity (Dunder Mifflin 00440674), Primary Contact (Michael Scott), Primary Contact Email (katiedomangue@gmail.com), Approval Status (Approved), and Status (Accepted). A navigation bar below the summary row includes links for Quote Lines (10+), Quote Documents (1), Agreements (1), Contracts (1), Orders (1), and Approvals. The main content area features a tabbed interface with 'Details' selected. The 'Details' tab shows a list of fields with their values and a blue arrow pointing to the 'Status' field, which is set to 'Accepted'. Other fields include Owner (Katie Melech), Account (Dunder Mifflin), Opportunity (Dunder Mifflin 00440674), Primary Contact (Michael Scott), Sales Rep (Katie Melech), Primary (checked), Signature Status (Signed), and Client Agreed without e-Signature (unchecked).

Field	Value
Quote	Q-395577
Account	Dunder Mifflin
Opportunity	Dunder Mifflin 00440674
Primary Contact	Michael Scott
Primary Contact Email	katiedomangue@gmail.com
Approval Status	Approved
Status	Accepted
Quote Lines	10+
Quote Documents	1
Agreements	1
Contracts	1
Orders	1
Approvals	
Owner	Katie Melech
Account	Dunder Mifflin
Opportunity	Dunder Mifflin 00440674
Primary Contact	Michael Scott
Sales Rep	Katie Melech
Primary	<input checked="" type="checkbox"/>
Signature Status	Signed
Client Agreed without e-Signature	<input type="checkbox"/>
Type	Quote

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.

Activity **Support**

Quick Case Create

* Category

Operations
 Billing
 Artwork
 Data

* Type

Client Agreed

CPQ Quote Request: Request assistance with CPQ quotes
Manual Supplements: Order Extras/Supplements after ATP
Open Job: Request to open job
Ops - Other: General questions to the operations team or for operations to use to send to rep
Orders - Changes: Request changes to a current order including NTAs, quantity, pricing, and versions
Orders - Decking: Request specific order decking
Orders - Solo/ Event Postcards: All Solo related support including Orders, Amendments, Cancellations, List Requests, and Ad Requests
Postal Increase: Automated price increase requests/ changes
Reports: Request Aging, LCSR, or Call Tracking reports
Territory Consents: Request permission to pursue a client located in another franchise's territory

* Client Agreed Reason

Email/Text
 Paper Contract

Product

--None--

* Subject

Client Signed Paper Contract

Case Opened On Behalf Of ⓘ

Search People...

Next

Activity **Support**

Quick Case Create

Compose text

Salesforce Sans 12

Warning! Details will clear if navigate to previous screen. Save copy of text outside of case create before clicking Previous button to avoid losing work.

Previous Next

Activity **Support**

Quick Case Create

Upload Files

Upload Files Or drop files

Next

Activity **Support**

Quick Case Create

Case created successfully. Navigate to the case to make edits or upload additional files.

Finish

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

The screenshot displays the Salesforce interface for an account named "Test Account Training Slides". At the top, there are action buttons: "+ Follow", "Launch", "Quick Quote", "A/R Balance", "Create VPO Client", "Change Owner", and "New Contact". Below this is a summary row with fields: Type (Client), VPO Status, Phone ((856) 663-7306), Category (Dining / Food / Beverage [2]), Account Ext ID, and Unpaid Invoice Balance (USD 0.00).

The main navigation area contains several tabs with counts: Contacts (1), Opportunities (1), Launch Campaigns ... (0), Quotes (1), Contracts (1), and Orders (1). Below these are more tabs: Chargent Orders (1), Actions (0), Chargent Payment ... (1), Consents (0), VPO Orders (Print A... (0), and VPO Orders (Digital... (0). A "Show All (21)" link is also present.

Three blue arrows with numbers 1, 2, and 3 point to specific elements: Arrow 1 points to "Chargent Orders (1)", Arrow 2 points to "Chargent Payment ... (1)", and Arrow 3 points to "Orders (1)".

Below the navigation area, there are tabs for "Feed", "Details", "Billing Dates", "Open Items", "Statement", and "LinkedIn". The "Details" tab is active, showing fields for Account Owner (Jason Wolf), Account Name (Test Account Training Slides), Phone ((856) 663-7306), and Email.

On the right side, there is a message: "We found no potential duplicates of this account." Below this is an "Activity" section.

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

Account
Test Account Training Slides

+ Follow Launch Quick Quote A/R Balance Create VPO Client Change Owner New Contact

Type: Client VPO Status: Phone: (856) 663-7306 Category: Dining / Food / Beverage [2] Account Ext ID: Unpaid Invoice Balance: USD 0.00

Contacts (1) Opportunities (1) Launch Campaigns ... (0) Quotes (1) Contracts (1) Orders (1)
Chargent Orders (1) Transactions (0) **1** Chargent Payment ... (1) Payment Consents (0) VPO Orders (Print A... (0) VPO Orders (Digital... (0)

Chargent Payment Requests

1 item • Sorted by Created Date • Updated a few seconds ago

	Payment Request Name	Request Status	Billing Contact	Email Address	Order	Payment Link Formatted	Created Date ↓
1	20200125-1272 2	Pending Rep Action			ORD-000017162	Payment Link	1/25/2020 6:48 PM

View All

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**.

The screenshot shows a web interface for a Payment Request. At the top, there is a header bar with a green icon and the text "Payment Request 20200430-2018". To the right of this header are three buttons: "Update for Wizard", "Resend Email", and "Cancel Request". A blue arrow labeled "3" points to the "Update for Wizard" button. Below the header is a navigation bar with two links: "Payment Consents (0)" and "Payment Request H... (1)". A blue arrow labeled "2" points to the "Payment Request H... (1)" link. The main content area is divided into several sections, each with a dropdown arrow and a title: "Record Details", "Contract Details", "Notification Details", and "Requested Consent Details". Each section contains two columns of information. A blue arrow labeled "1" points to the "Order" field in the "Record Details" section, which has the value "ORD-000017420".

Payment Request 20200430-2018	
Payment Consents (0) Payment Request H... (1)	
Record Details	
Payment Request Name 20200430-2018	Request Status Pending Rep Action
Order ORD-000017420	Link Expiration Date 5/30/2020 8:45 AM
Account Test Account - New Consent Video	Cancel Reason ⓘ
Contract Details	
Contract 00018479	Contract End Date 9/4/2020
Notification Details	
Billing Contact	Notes
Email Address ⓘ	Internal Notes ⓘ
	Payment Link Formatted Payment Link
Requested Consent Details	
Payment Recurrence	One Time Charge Amount
Requested Recurrence Summary ⓘ	One Time Requested Date ⓘ

UPDATE FOR WIZARD

Update for Wizard

RECIPIENT

Send Payment Request Email to Client? ⓘ

* Contact to Notify

melech | katedomangue@gmail.com

Email - If both a contact is selected and an email entered, the email will only go to the manually typed email address.

CONSENT

* Product to be Charged

Blue Envelope

* Payment Recurrence

One Time

* One Time Charge Amount - Prepopulated with first bundle amount if available

One Time Requested Date - Leave BLANK if you want charge to be immediately upon consent submission.

NOTES

Franchise Payment Request Notes - Automatically included in email:
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.

Client Additional Notes - Included in email to client if email sent and consent wizard if enabled. Best practice is to call out what consent will cover (Plus One, Blue Envelope, Past Due Invoices, etc) especially if multiple consents needed.

Submit

UPDATE FOR WIZARD: RECIPIENT

RECIPIENT

Send Payment Request Email to Client? ⓘ **1**

* Contact to Notify

Spiro Hiotis | jessicawaldon@hotmail.com **2**

Email - If both a contact is selected and an email entered, the email will only go to the manually typed email address.

3

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

* Product to be Charged

Blue Envelope **1**

* Payment Recurrence

One Time **2**

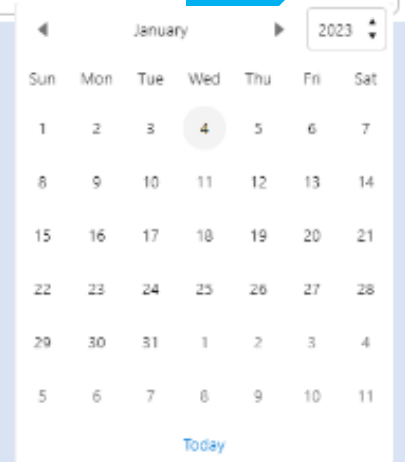
* One Time Charge Amount - Prepopulated with first bundle amount if available

\$519.44 **3**

One Time Requested Date - Leave BLANK if you want charge to be immediately upon consent submission.

4

5



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 – 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. One Time Charge Amount – This will automatically populate with the 1st bundle amount if available.
4. One Time Requested Date – 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.

CONSENT

*Product to be Charged

Blue Envelope **1**

*Payment Recurrence

Fixed Recurring **2**

*Recurring Charge Amount - Prepopulated with first bundle amount if available

\$519.44 **3**

4 Combine same month charges? Additional mailings will be combined to a single charge each month. If additional mailings exist and box is checked, you MUST submit one time payment requests for additional mailings.

*Preferred Billing Day of the Month ⓘ

1st **5**

*Normal Pay Schedule - Indicate if your client typically pays before or after mailing.

Before **6**

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.

CONSENT

* Product to be Charged

Blue Envelope **1**

* Payment Recurrence

One Time + Fixed Recurring **2**

* One Time Charge Amount - Prepopulated with first bundle amount if available

\$519.44 **3**

One Time Requested Date - Leave BLANK if you want charge to be immediately upon consent submission.

4

* Recurring Charge Amount - Prepopulated with first bundle amount if available

\$519.44 **5**

6 Combine same month charges? Additional mailings will be combined to a single charge each month. If additional mailings exist and box checked, you MUST submit one time payment requests for additional mailings.

* Preferred Billing Day of the Month ⓘ

1st **7**

* Normal Pay Schedule - Indicate if your client typically pays before or after mailing.

Before **8**

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 31st and there are only 30 days that month, it will run on the 30th.

CONSENT

* Product to be Charged

All **1**

* Payment Recurrence ⓘ

Flat Amount Recurring **2**

* Recurring Flat Amount

\$2,362.92 **3**

* Number of Payments

3 **4**

* Preferred Billing Day of the Month ⓘ

1st **5**

UPDATE FOR WIZARD: NOTES

NOTES

Franchise Payment Request Notes - Automatically included in email:

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.

Client Additional Notes - Included in email to client if email sent and consent wizard if enabled. Best practice is to call out what consent will cover (Plus One, Blue Envelope, Past Due Invoices, etc) especially if multiple consents needed.

Any additional notes you want the client to see on the participation agreement.

Consent Internal Notes - Notes to person doing actual charges. Not visible to client.

Any additional notes you want the Billing team to know about the consent.



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.

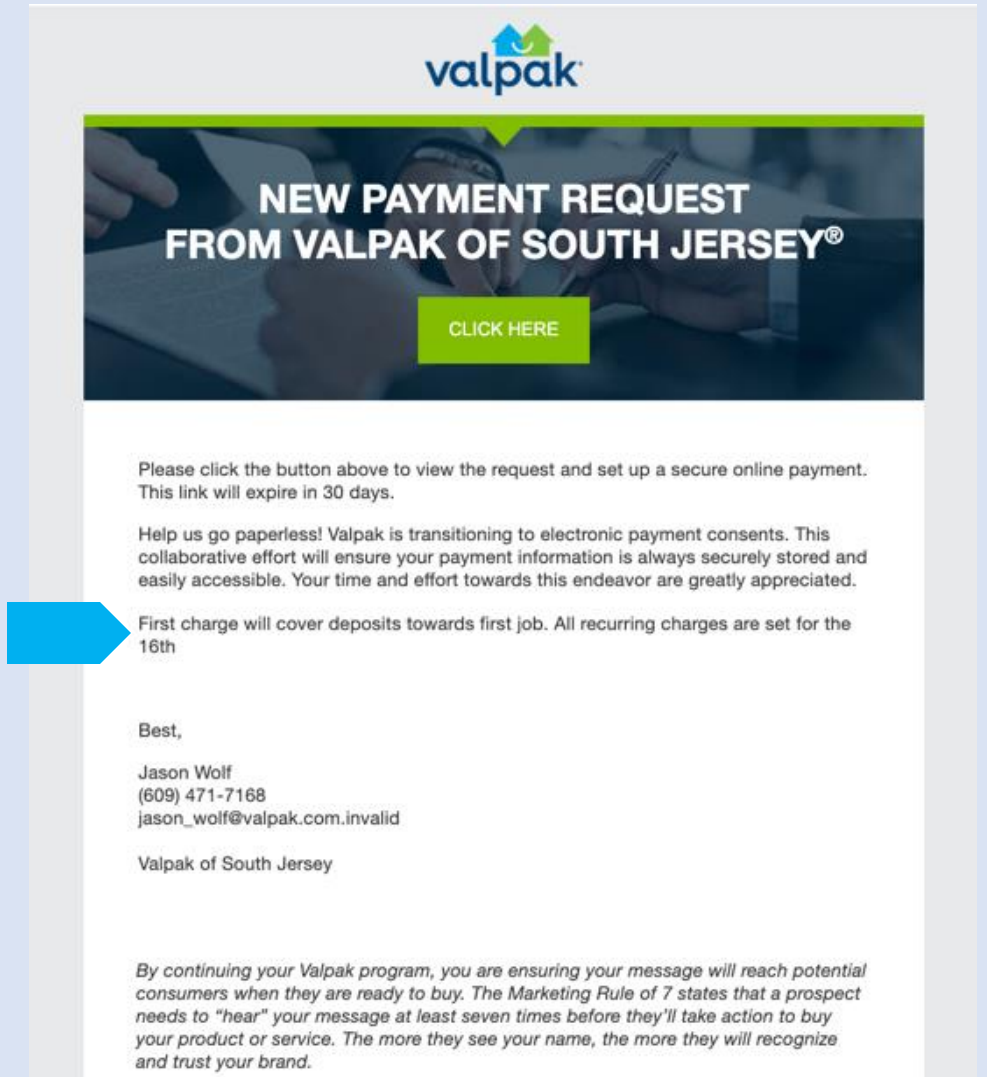
PAYMENT CONSENT

EMAIL TO CLIENT

□ ☆ ▷ Katie Melech

New Payment Request From Valpak of Kings County - New Payment Request from Valpak of Kings County® Click Here Please click the button...

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.



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

valpak

SELECT PAYMENT METHOD

Valpak of Kings County appreciates your business. Please enter or verify your payment information.

Account
ATHENA MEDITERRANEAN CUISINE

Existing Payment Method or New

1 New

Payment Method Type

2 Credit Card

Cancel Next 3

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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.

The screenshot shows the Valpak 'ENTER PAYMENT DETAILS' form. At the top is the Valpak logo and a banner with the text 'ENTER PAYMENT DETAILS'. Below the banner is a message: 'Valpak of Kings County appreciates your business. Please enter or verify your payment information.' The form contains the following fields and sections:

- Account:** ATHENA MEDITERRANEAN CUISINE
- Payment Method Type:** Credit Card
- Payment Method Nickname:** John's Business Card (indicated by callout 1)
- Instructions:** For credit card, the minimum amount (\$0.01 - \$1.00) will be authorized at this time. For ACH, \$0.01 will be charged and immediately voided. Avoid special characters in the Bank Account Name as this will cause it to fail. For example, use 'and' instead of '&'.
- Billing Address:** Test 1, Test 1, Florida, 33716, United States, jessicawaldon@hotmail.com, 01100486808 (indicated by callout 2)
- Payment Info:** Valpak, 1111 1111 1111 1111, 02 / 55, ... ? (indicated by callout 3)
- Buttons:** Cancel, Authorize \$1.00 (indicated by callout 4)

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!

PROVIDE PAYMENT CONSENT

Valpak of South Jersey appreciates your business. Please enter or verify your payment information.

1 first charge will be 100 towards the first job. recurring will be processed on the 16 of every month.

Account	Payment Method Type
Test Account - New Consent Video	Credit Card

Payment Method Details	Billing Address
Visa 1111 06/25 Rochelle mills	401 Pennsylvania Avenue Palm Harbor, Florida 34683

Payment Recurrence Summary	Consent Expiration Date
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.	09/04/2020

* Transaction Email	* Billing Email
<input type="text" value="romills99@gmail.com"/>	<input type="text" value="romills99+19@gmail.com"/>
e.g. Charge Receipts	e.g. Invoice Delivery

* Form Completed By

5

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 "I Accept" at the bottom of this page, and to decline these Terms click "Cancel".

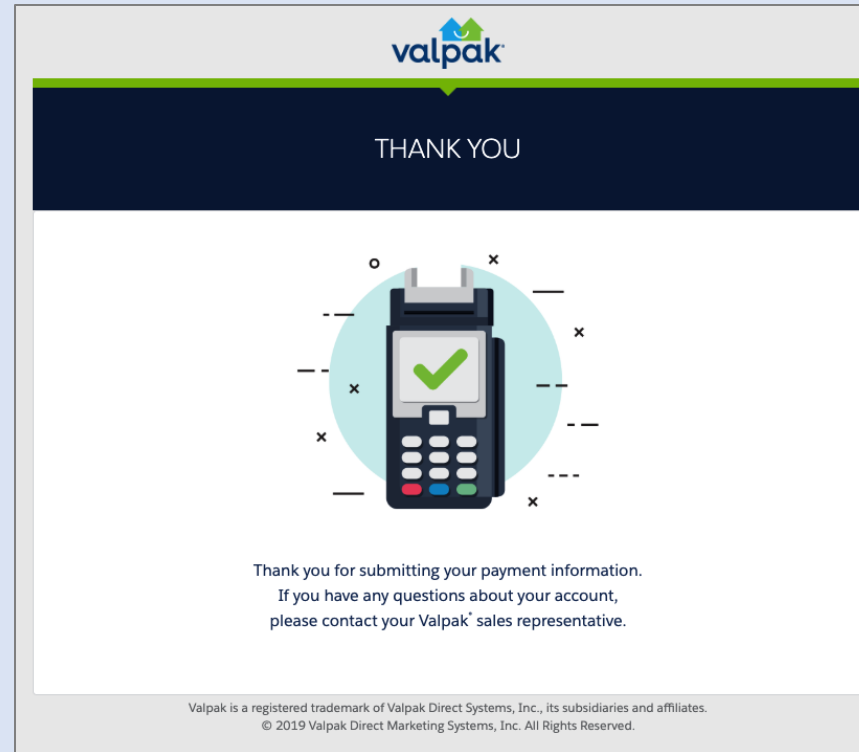
6 By clicking on the box, you are indicating you have read and agree to the Terms of Use

7

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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 | 1111 | 06/25 | 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

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ACCESS TO THE PAYMENT LINK

 Payment Request
20200430-2018

[Update for Wizard](#) [Resend Email](#) [Cancel Request](#)

∨ Contract Details

Contract 00018479	Contract End Date 9/4/2020
--------------------------------------	-------------------------------

∨ Notification Details

Billing Contact	Notes
Email Address ⓘ	Internal Notes ⓘ
	Payment Link Formatted Payment Link

∨ Requested Consent Details

Payment Recurrence	One Time Charge Amount
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You have access to the payment link if needed.

POST PAYMENT CONSENT

FINDING PAYMENT CONSENT

The screenshot shows the Salesforce interface for the 'Dunder Mifflin' account. The navigation bar includes 'Accounts' and 'Payment Consents (1)'. The 'Payment Consents' section is expanded, showing a table with one entry:

Payment Consent Name	Chargent Order	Consent Status	Product ...	Consent Limit	Payment Recurrence	Frequency	Preferred ...	Transaction Receipt Email	Contract
1 CONSENT-122004	000088592	Created	All	USD 2,062.47	Fixed Recurring	Monthly	10th	katedomangue@gmail.com	00145835

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

Payment Consent
CONSENT-000233 Printable View

Account Ext ID	Consent Status	Payment Recurrence	Payment Method Nickname	Payment Method Details
	Created	One Time + Fixed Recurring	Ro Test Visa Card	Visa 1111 06/25 Rochelle mills

Information

Account: [Test Account - New Consent Video](#)

Franchise: Valpak of South Jersey

Chargent Order: [ORD-000017420](#)

Charge Amount: [Info]

Consent Limit: USD 1,500.00

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

Payment Method Nickname: Ro Test Visa Card

Payment Request: [20200430-2019](#)

Consent Status: Created

Effective Start Date: 5/1/2020

Effective End Date: 9/4/2020

Transaction Receipt Email: [rochelle00@gmail.com](#)

Files (1)

[Consent Summary 05/01/2020 for Test Account - New Con...](#)
May 1, 2020 · 7KB · pdf

[View All](#)

Payment Consent History (1)

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

YOUR PAYMENT CONSENT SUMMARY FROM VALPAK OF SOUTH JERSEY®

Account: Test Account Training Slides

Payment Method Nickname: Weekend Visa Card

Payment Method Details: Visa | 1111 | 01/21 | Rochelle mills

Payment Recurrence: Fixed Recurring

Frequency: Monthly

Preferred Billing Date/ Day: 8th

Estimated Amount: \$1055.59

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TRANSACTION HISTORY

The screenshot shows the Valpak account record for 'MEDIAGISTIC - FREEDOM HEATING & AIR'. The 'Transactions' section is highlighted with a blue arrow and the number '1'. Below this section is a table with 6 items, sorted by Gateway Date. The table columns are Transaction ID, Order, Gateway Date, Amount, Type, Response Sta..., Respons..., Credit Card Type, Card Last 4, and Bank Acc... The transactions listed are:

Transaction ID	Order	Gateway Date ↓	Amount	Type	Response Sta...	Respons...	Credit Card Type	Card Last 4	Bank Acc...
1 TRX-000000436	ORD-000000746	10/12/2018, 5:00 PM		Register Token	Error		Visa	8397	
2 TRX-000000435	ORD-000000740	10/12/2018, 4:57 PM		Register Token	Error		Visa	5267	
3 TRX-000000432	ORD-000000741	10/12/2018, 4:37 PM		Register Token	Error		American Express	1008	
4 TRX-000000431	ORD-000000741	10/11/2018, 3:20 PM		Register Token	Error		American Express	1008	
5 TRX-000000430	ORD-000000741	10/11/2018, 3:18 PM		Register Token	Error		American Express	1008	
6 TRX-000000429	ORD-000000741	10/11/2018, 3:17 PM		Register Token	Error		Discover	0616	

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.