

Our Focus In Q4? Our Sales & Support Teams

Our consumer interest levels are high, and we know to end the year strong we've focused our Q4 roadmap to deliver the following.

- 1. Market Playbooks
- 2. Order Entry Improvements
- 3. Shifting to Salesforce case support to align with other support channels
- 4. Merchant App Improvements
- 5. CCO Merchant Deal Reporting
- 6. Ability to Process New FADs
- 7. CCO Week For Select Markets

CCO PLAYBOOK
Valpak Market Expansion – No Clipp Publication

PURPOSE OF THE PLAYBOOK

Equip sales with tactics to launch Community Co-Op (CCO) in a market where the Valpak Blue Envelope mails, but a Clipp publication does not. Without the presence of a Clipp publication, sales and marketing will collaborate on tactics within this playbook to grow the consumer subscriber database in target zones and identify the best businesses for this type of advertising.

OVERVIEW


Community Co-Op (CCO) is a payment program that enables advertisers to run print ad campaigns with part or all the funds coming from consumers who purchase certificates online at Clipp.com or Valpak.com.

CCO ads direct consumers to clipp.com, where they can purchase certificates for 50%-90% off. Funds from certificate sales cover the client's ad costs.

Note: these offers are also posted to Valpak.com under the Deals tab.

OBJECTIVE

Focus on adding CCO clients in strong Valpak neighborhood trade areas (NTAs) where the envelope already has a good presence (high piece count and good category mix). Consider focusing on prospects that are in good locations to nearby NTAs. Begin with 10 NTAs to focus on, then expand as you see success at acquiring BOTH businesses and consumers. Building a consumer audience will be a collective effort by sales and marketing (more details in this document) and is an important piece of helping to build new business and repeat business for our clients.

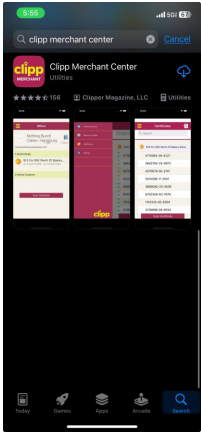


CCO Changes,
Updates and Reminders

Merchant Deal Report
Merchant: Kungfu Sushi All You Can Eat (571199)
Rep: Laurie Ferry

Deal: (All)

Deal Description	Certificate Summary					Deal Summary				
	Certificates Sold	Number Unredeemed	Number Redeemed	Expired Certificates	Avg Pre-Discount Amount	Batch Release Date	Full Value	Offer Price	Batch Release Qty	Quantity Sold
\$15 for \$30 Worth of Asian Cuisine	1077	207	821	49	\$21.22	1/31/2024	\$30.00	\$15.00	216	216
						2/28/2024	\$30.00	\$15.00	216	216
						3/27/2024	\$30.00	\$15.00	128	128
						5/1/2024	\$30.00	\$15.00	192	84
						5/29/2024	\$30.00	\$15.00	108	108
						6/5/2024	\$30.00	\$15.00	64	64
						7/3/2024	\$30.00	\$15.00	192	192
\$20 For \$40 Worth Of Asian Cuisine	8	5	3	0	-\$1.00	8/14/2024	\$30.00	\$15.00	64	64
						10/9/2024	\$40.00	\$20.00	81	8



Market Playbooks

We've developed playbooks that markets can use to grow their CCO presence and can be found under the Clipp Sales Material on Inside Valpak.

The playbooks include:

- Best practices on how grow number of businesses in their market (who, where, when, and offer types).
- Best practices on how to grow consumer adoption in their market (business concentration, local marketing efforts, working with businesses to promote).
- Best practices for NEW markets.
- Support resources that are available.
- Much more..

CCO PLAYBOOK

Valpak Market Expansion – No Clipp Publication

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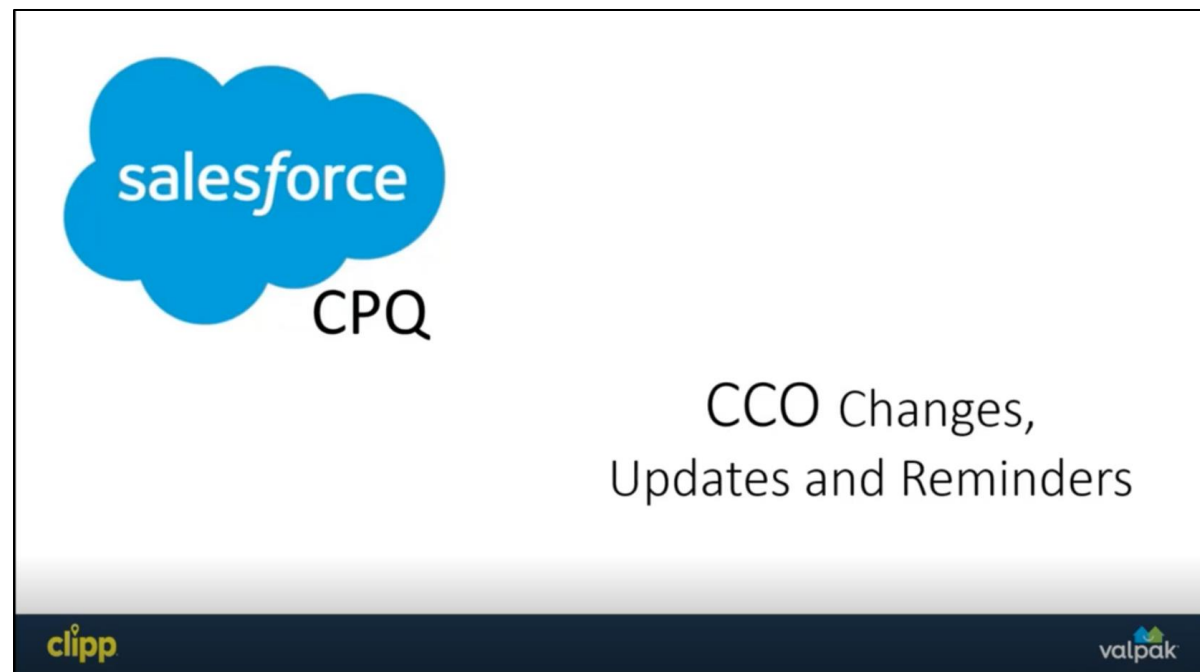
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Order Entry Improvements

We've worked with our partners in CRM to make the following improvements.

1. A location function has been added to help reduce the steps needed to enter CCO orders and will automatically create an account location.
2. The deal team will create data requests and match the request to the CCO ad.
3. Deal page proofing will be sent to the seller via chatter. Changes can be submitted via case. Otherwise, deal will go live.



[New Video Out Now! Watch in under 7 minutes.](#)

Support Channels

Here's a step-by-step guide on how to monitor and complete CCO cases in Salesforce:

Who opens the Case: The Sales Rep or Sales Support Specialist

What are examples for a CCO Case: Covers deal related inquiries, requests for changes, ad status updates, report requests, Groupon removal, etc.— Anything a Sales Rep previously requested by email

MerchantSupport@Clipp.com

How do you open a CCO Case in Salesforce:

- **Help & Support:** Click to Start
- **Product Group:** Clipp or Valpak
- **Category:** Operations
- **Type:** CCO Support
- **Enter a Subject, Select Account Record & Enter Details on the next screen**
- **Upload any resources if needed**

The screenshot shows the 'Quick Case Create' form in Salesforce. It has three main sections: 'Product Group', 'Category', and 'Type'. The 'Product Group' section has two radio buttons: 'Clipp' (selected) and 'Valpak'. The 'Category' section has four radio buttons: 'Operations' (selected), 'Billing', 'Artwork', and 'Data'. The 'Type' section is a dropdown menu with 'CCO Support' selected. Below these sections is a 'Type Help' section with a list of case types and their descriptions. The list includes: 'Account Transfer', 'CCO Support', 'Client Agreed', 'Clipp Call Tracking Support', 'Clipp Ops - Other', 'Clipp Orders - Cancellations', 'Clipp Orders - Changes', 'Late Orders/ Cancellations', 'Orders - Solo/ Event Postcard', and 'Regional Sales Support'. The 'CCO Support' description matches the text in the slide: 'Covers deal related inquiries, requests for changes, ad status updates, report requests, Groupon removal, etc.'.

Help and Support

Quick Case Create

*Product Group

☒ Clipp

☐ Valpak

*Category

☒ Operations

☐ Billing

☐ Artwork

☐ Data

*Type

CCO Support

▼ Type Help

Account Transfer: Request for Transferring Account Ownership

CCO Support: Covers deal related inquiries, requests for changes, ad status updates, report requests, Groupon removal, etc.

Client Agreed: Request to Management for CPQ approval in lieu of client electronic signature. Supporting Documentation Required.

Clipp Call Tracking Support: Changing print-to-number, updating account reps for reporting, cancelling numbers, report requests, tracking number issues, etc.

Clipp Ops - Other: Other types of requests not listed or general questions about a Clipp order

Clipp Orders - Cancellations: Request to cancel a Clipp product from an order

Clipp Orders - Changes: Request amendment to current Clipp order(s) including NTAs(books), quantity, pricing, versions, etc.

Late Orders/ Cancellations: Requesting to add/ remove an order past deadline. POA will need to see if possible.

Orders - Solo/ Event Postcard: All Solo related support including Orders, Amendments, Cancellations, List Requests, and Ad Requests, etc.

Regional Sales Support: Reach the RSA for help with intercompany escalations, inquiries, sales tool/ process support and personalized training

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

Support Channels

Once the Case is submitted, it moves to the **CCO Support Queue** which is monitored *8am – 8pm ET Monday – Sunday*.

Support team member will move the ticket to **Working Status** once they start to assess the Case within *no longer than one business day*.

When there is a resolution and/or next step, the Support team member will **tag the rep/requestor** in the response to the case and share.

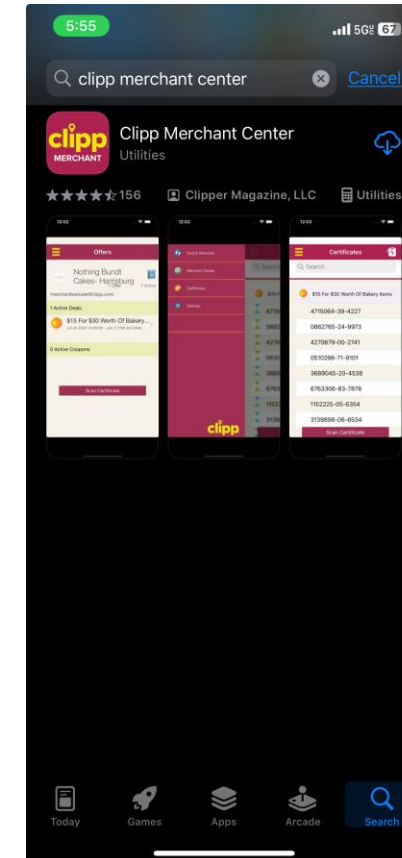
The screenshot displays the Valpak Clipp.com support case interface. The case title is "CLIENT IS REFUSING TO ACCEPT GROUPON- WE WILL NEED TO RESELL ANY GROUPON DEALS CREDITED BACK TO CUSTOMERS ON CLIPP.COM ONLY". The case details include Franchise ID 3361, Account Name PLUMPTON PARK ZOO, and Subject CLIENT IS REFUSING TO ACCEPT GROUPON- WE WILL NEED TO RESELL ANY GROUPON DEALS CREDITED BACK TO CUSTOMERS ON CLIPP.COM ONLY. The case is currently in "Working" status. The "Feed" section shows a post by Stacie Paul-Rodriguez with a text input field and a rich text editor. A green dashed arrow points from the "Requestor User" field (Stacie Paul-Rodriguez) to the "@Stacie Paul-Rodriguez" tag in the feed. The bottom of the screen shows a navigation bar with various links like "Recent Items", "Help and Support", "Daily Dashboards & Reports", etc.

Merchant App Updates

Clipp Merchant App V2.0.3 can now be downloaded onto Apple and Android devices.

This latest version should resolve issues where the app would stop working.

Also coming soon, an updated, new version of the Merchant app.



CCO Reporting (Beta)

We've finished the two most requested CCO reports and have released them for field use in our public Beta.

The folder can be found at [this link](#).

- 1. Merchant Deal Report which includes key information on number of certificates sold, where they were sold, and if the customer was new.
- 2. Certificate Report which includes detailed information each certificate sold, the redemption date, and the amount of the redemption

Merchant Deal Report
Merchant: A.J. O'BRADY'S - 1697 | 235255

Deal: (All)

Deal Description	Certificate Summary					Deal Summary				
	Certificates Sold	Number Unredeemed	Number Redeemed	Expired Certificates	Avg Pre-Discount Amount	Batch Release Date	Full Value	Offer Price	Batch Release Qty	Quantity Sold
\$15 For \$30 Worth Of Irish Cuisine - 12306383 - (2024-09-09)	32	17	15	0	\$34.41	9/11/2024	\$30.00	\$15.00	140	32
\$15 For \$30 Worth Of Irish Pub Fare - 255723 - (2019-01-23)	64	0	56	8	\$36.05		\$30.00	\$15.00		
\$15 For \$30 Worth Of Irish Pub Fare - 264395 - (2019-02-27)	1566	141	1182	243	\$39.76	1/1/2019	\$30.00	\$15.00	897	897
						11/22/2023	\$30.00	\$15.00	68	68
						1/17/2024	\$30.00	\$15.00	68	62
						2/21/2024	\$30.00	\$15.00	140	134
						3/27/2024	\$30.00	\$15.00	68	68
						5/1/2024	\$30.00	\$15.00	68	68
						6/5/2024	\$30.00	\$15.00	68	68
						7/24/2024	\$30.00	\$15.00	68	68
						9/4/2024	\$30.00	\$15.00	68	68
						10/2/2024	\$30.00	\$15.00	68	53
\$15 For \$30 Worth Of Irish Pub Fare - 269385 - (2019-05-08)	64	0	55	9	\$24.92		\$30.00	\$15.00		
\$15 For \$30 Worth Of Irish Pub Fare - 270772 - (2019-06-12)	64	0	56	8	\$38.30		\$30.00	\$15.00		
\$15 For \$30 Worth Of Irish Pub Fare - 278584 - (2019-07-31)	164	0	135	29	\$41.60		\$30.00	\$15.00		
\$15 For \$30 Worth Of Irish Pub Fare - 279698 - (2019-09-11)	64	0	57	7	\$42.76		\$30.00	\$15.00		
\$15 For \$30 Worth Of Irish Pub Fare - 8014461 - (2019-10-09)	64	0	52	12	\$37.39		\$30.00	\$15.00		
\$15 For \$30 Worth Of Irish Pub Fare - 8119917 - (2019-11-27)	64	0	51	13	\$40.97		\$30.00	\$15.00		

Merchant Deal Report

Once you've accessed the Merchant deal report, search for your business by utilizing the search functionality, moving the business over to the selected box, and clicking "Run Document".

You can search for any offers that began after January 1, 2019 by using any of the following.

1. Clipp Business ID
2. Business Name
3. ESP Account ID

The screenshot shows a web application interface for generating a Merchant Deal Report. At the top, there's a section titled "Customer" with the instruction "Choose elements of Customer" and "This prompt allows only one selection." Below this is a search bar with the text "Search for:" and a search button. The search bar contains the value "1697". To the right of the search bar is a checkbox labeled "Match case". Below the search bar is a list of available businesses, each preceded by a diamond icon. The first item, "A.J. O'BRAIDY'S - 1697 | 235255", is highlighted. To the right of the list is a "Selected:" box containing "(none)". Below the list is a pagination bar showing "1 - 24 of 24". At the bottom of the interface is a "Report Message Name:" field with the value "Deal Certificates Report" and two buttons: "Run Document" and "Cancel". Red arrows point to the search bar, the "A.J. O'BRAIDY'S" entry, the "Selected:" box, and the "Run Document" button.

Customer

Choose elements of Customer

This prompt allows only one selection.

Search for: 1697 ☐ Match case

Available:

- ◆ A.J. O'BRAIDY'S - 1697 | 235255
- ◆ Abdu Hala Meat & Grocery - 316972 | 571587
- ◆ Allstate- Cinda Bennett - 188234 | 416978
- ◆ Amores Kitchen - 316975 | 572621
- ◆ Asian Taste One - 91786 | 316974
- ◆ B&S Carpets - 104445 | 169796
- ◆ BIRDCODE - 316976 | 572745
- ◆ Bismillah - 58773 | 140708

Selected: (none)

1 - 24 of 24

Report Message Name: Deal Certificates Report

Merchant Deal Report

Search Tips

- 1. The best way to search is by using the Clipp business ID. This can be found on your salesforce account record.
- 2. Use “” to get an exact match for businesses that are more than one word.

Account Name	KUNGFU SUSHI ALL YOU CAN EAT	
Category	Dining / Food / Beverage [2]	
Sub Category	Asian Restaurants [7]	
Sub Category 3	Chinese [17]	
NAIC	FULL-SVC RSTRNTS - CHINESE	
No Balance	<input checked="" type="checkbox"/>	
PlusOne Delivery Report	PlusOne Informed Delivery	
Legacy Acct ID	571199	
Legacy SFAcct ID	0018a00002RfM5xAAF	
Clipp Business Id	312475	

Customer (Re

Choose elements

This prompt allow

Search for:

"Kungfu Sushi"

Available:

Merchant Deal Report

The report will have three different sections. The first section will be a summary of deals that have been released (and their start date) including.

Total certificates that have been sold, unredeemed, redeemed, and how many have expired.

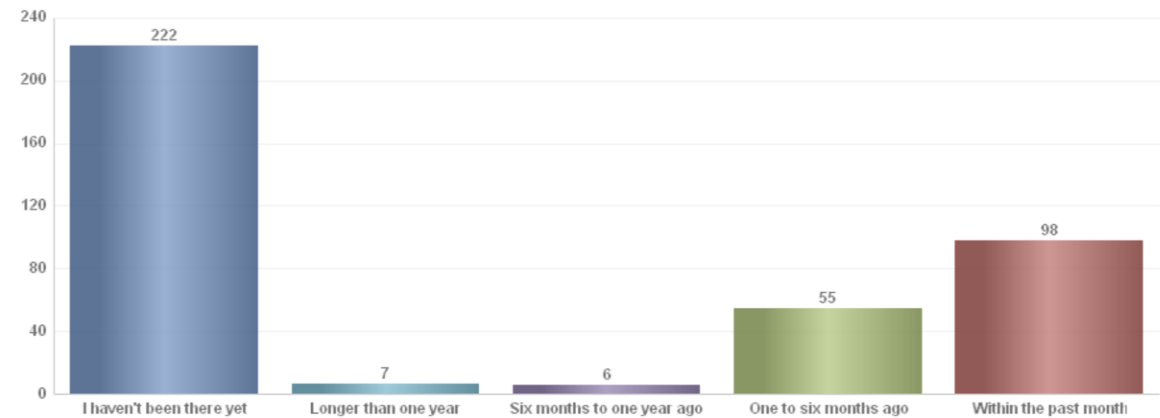
The report will also detail sales by “batch release date”. Batch release dates typically are associated with a mail date that was associated with CCO or, in some cases, a FAD (Future Advertising Dollar) program.

Merchant Deal Report										
Merchant: A.J. O'BRADY'S - 1697 235255										
Deal: (All)										
Deal Description	Certificate Summary					Deal Summary				
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Merchant Deal Report

The other two sections of the report include information that the consumer has shared as part of their transaction or redemption. This includes a survey, and location information.

Survey Results
When was the last time you visited this business?



Top 10 Sales Zip Codes

Zip	Total Amount	State	City	Number Sold
19440	\$965.25	PA	HATFIELD	69
19454	\$825.17	PA	NORTH WALES	57
18944	\$529.75	PA	PERKASIE	33
19446	\$488.50	PA	LANSDALE	30
18914	\$386.00	PA	CHALFONT	27
18964	\$391.25	PA	SOUDERTON	27
18015	\$493.50	PA	BETHLEHEM	20
18951	\$300.00	PA	QUAKERTOWN	18
18942	\$165.00	PA	OTTSVILLE	11
19462	\$138.00	PA	PLYMOUTH MEETING	11
19525	\$164.50	PA	GILBERTSVILLE	11

Certificate Report

Once you've accessed the certificate report, simply search for the advertiser using the same search methods as the merchant deal report (Clipp Business ID, Name, ESP Account).

Customer

Choose elements of Customer
This prompt allows only one selection.

Search for: 1697 ☐ Match case

Available:

- A.J. O'BRADY'S - 1697 | 235255
- Abdu Hala Meat & Grocery - 316972 | 571587
- Allstate- Cinda Bennett - 188234 | 416978
- Amores Kitchen - 316975 | 572621
- Asian Taste One - 91786 | 316974
- B&S Carpets - 104445 | 169796
- BIRDCODE - 316976 | 572745
- Bonus Dinner - 58773 | 140708

1 - 24 of 24

Selected: (none)

Report Message Name: Deal Certificates Report

Run Document Cancel

Certificate Report

Next, select the deal (based on start date) and the report will load with the following.

- Created date of the certificate
- Redemption date of the certificate
- The certificate number
- Purchaser name & state
- The offer
- Certificate value that was purchased
- The amount that the consumer spent.
- If the consumer was granted a refund.

Deal Certificates Report

Business: KUNGFU SUSHI ALL YOU CAN EAT

Offer:

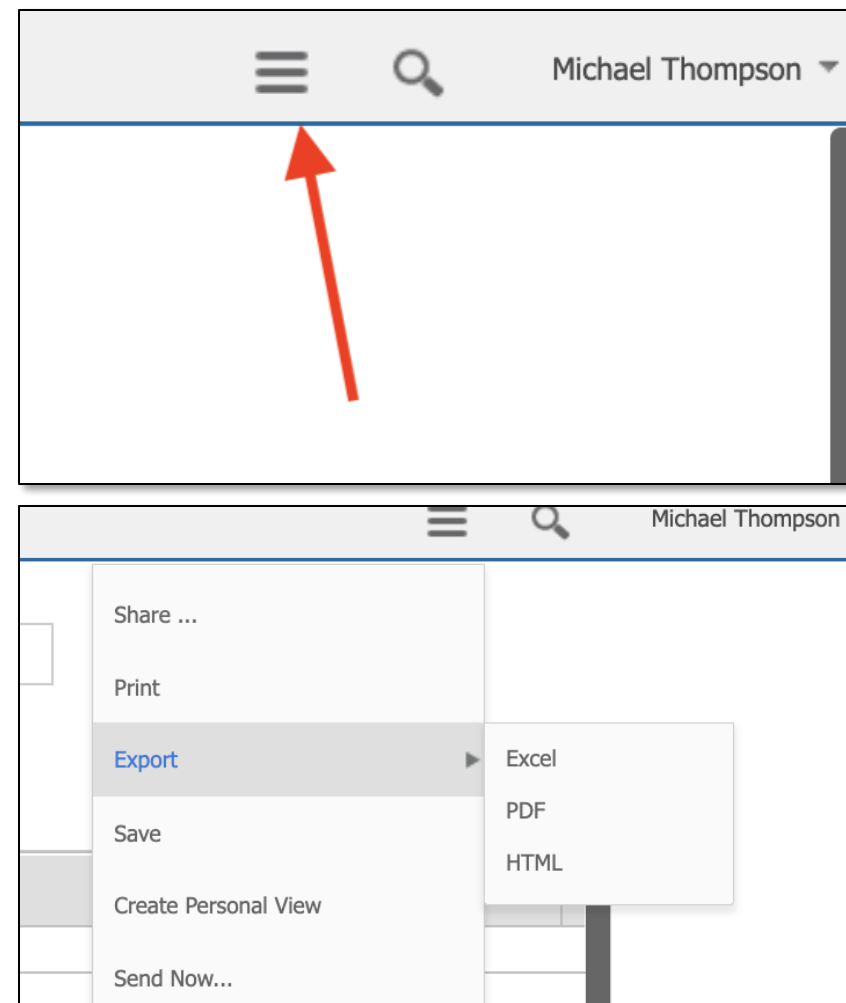
Total Certificates: \$15 for \$30 Worth of Asian Cuisine - 11441317 - (2024-01-31)

Total Redeemed: \$20 For \$40 Worth Of Asian Cuisine - 12386570 - (2024-10-09)

Deal Certificates Report								
Business: KUNGFU SUSHI ALL YOU CAN EAT								
Offer: \$15 for \$30 Worth of Asian Cuisine - 11441317 - (2024-01-31)								
Total Certificates: 638								
Total Redeemed Certificates: 481								
Certificate Create Date	Redemption Date	Certificate Nbr	Purchaser Name	Purchaser State	Offer	Value	Pre-Discount	Refunded
1/31/2024 1:30 PM	2/25/2024 7:53 PM	1177429-99-6804	Daniel Kuppersmith	PA	\$15 for \$30 Worth of Asian Cuisine	\$30.00	\$35.00	
1/31/2024 1:30 PM	2/13/2024 5:52 PM	2555725-94-5199	Daniel Kuppersmith	PA	\$15 for \$30 Worth of Asian Cuisine	\$30.00	\$57.22	
2/2/2024 2:29 PM	7/5/2024 4:53 PM	0738330-46-0798	Jennifer Heagy	PA	\$15 for \$30 Worth of Asian Cuisine	\$30.00	\$35.00	
2/2/2024 2:44 PM	2/2/2024 4:56 PM	8986338-54-5652	Kyler Schwartz	PA	\$15 for \$30 Worth of Asian Cuisine	\$30.00	\$30.00	
2/2/2024 3:08 PM	3/12/2024 2:08 PM	0844470-65-6583	Jillian ehst	PA	\$15 for \$30 Worth of Asian Cuisine	\$30.00	\$36.00	
2/2/2024 3:22 PM	7/23/2024 11:46 PM	8845524-83-5914	dawn falco	PA	\$15 for \$30 Worth of Asian Cuisine	\$30.00	\$35.00	
2/2/2024 3:22 PM	3/22/2024 7:52 PM	0641145-21-5707	dawn falco	PA	\$15 for \$30 Worth of Asian Cuisine	\$30.00	\$30.00	

Certificate Report

Pro tip: if you'd like to download this report, or any report to excel. Simply click in the upper right corner, select export, and then excel.



Questions

Support

If you're getting an error logging into Microstrategy using your SSO credentials, first try a second browser (firefox). The issue is most likely that you are logged into both Valpak and Clipper systems. This is a known issue and is being worked on.

If you are having issues accessing MicroStrategy, please email FAST, fast@valpak.com.

If your advertiser is not appearing after searching by Clipp ID. Please open a CCO Support case in Salesforce.

If you have questions about the data. Please open a CCO Support case in Salesforce.

What's coming next?

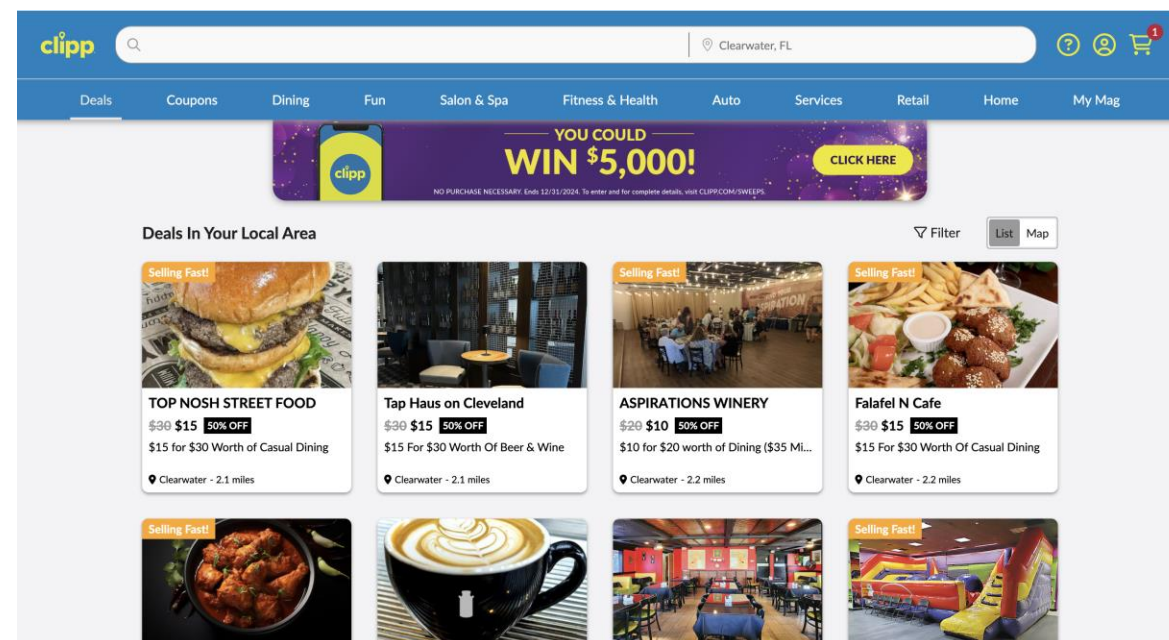
In addition to more filters on reports, be on the lookout for Clipp QR code reporting to migrate over the next 30 days.

FADs

Starting today, we are now able to process FADs for release in November and beyond.

FADs will be approved for customers who are in good financial standing, whose deals will be applied to future product buys at CCO rate.

FADs will not be approved to pay past due balances, or non approved rates.



Processing New FADs

Temporary Process for Submitting Future Ads (FAD) Orders

We're pleased to announce the return of Future Ads (FAD), with a temporary process designed to streamline and support your sales efforts. Beginning today, you can start using this new process to submit FAD orders. Below are the step-by-step instructions and guidelines to follow.

1. Salesforce CPQ: Use to create a quote.

- **Product Selection:** Select "I will Choose Later", then choose Clipper Misc Charge for Clipp from the product list with quantity of 1 and price as \$0, and enter the start date.

(Note: Quantity of zero prevents publishing on Clipp.com)

Q-554669

Product Selection

misc

PRODUCT NAME	PRODUCT DESCRIPTION	PRODUCT CODE
<input checked="" type="checkbox"/> Clipper Misc Charge	Clipper Miscellaneous Charge	CL-MISC

- **Type:** Enter "FAD" in the Type field.

Q-553824

Configure Products

Clipper Misc Charge

Misc Charge TypeOther

Misc Charge Other TypeFAD

- **Deal Details:** Enter # of certificates & the offer details in the *Internal Notes section on the Quote*

Quote

Q-553824

Internal Notes

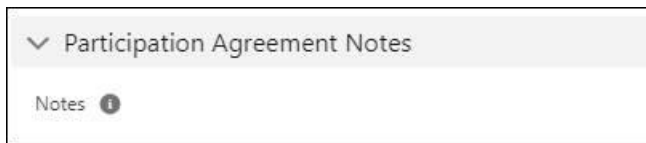
Internal Notes ⓘ

100 Certificates \$15 for \$30 of Mexican Food

Trade and Barter Description ⓘ

Processing New FADs

2. Client Signature: Obtain client signature and include relevant details in the Notes section.



▼ Participation Agreement Notes

Notes ⓘ

3. Transaction Allocation: Transactions from certificate purchases generating a credit.

4. Print Orders:

- Once the client's FAD transaction credit is enough to cover a print order, generate a new quote for the print request.
- **IMPORTANT:** No discounts for print products.
- Approval requires sufficient FAD dollars to cover the order.

5. Data Requests: Handled by Deal Specialist, like CCO orders.

Processing New FADs

6. Payment Allocation: After the client signs the quote for the print product, the seller can submit a Payment Allocations Case to apply the funds.

?

Help and Support

Quick Case Create

* Product Group

☒ Clipp

☐ Valpak

* Category

☐ Operations

☒ Billing

☐ Artwork

☐ Data

* Type

Payment Allocations

▼ Type Help

Product

--None--

* Subject

FAD Credit allocation

- **Product Group:** Clipp
- **Category:** Billing
- **Type:** Payment Allocations
- **Subject:** FAD Credit Allocation
- **Account:** Select SF Account Record
- **Details:** Specify the total amount to allocate. Provide the order reference number(s) associated with this allocation. Clarify if there are any split payments, partial payments, or additional upcoming payments.

Previous FADs: All previous FADs that have run and completed will have credits begin to show up over the next week inside of Salesforce, under the AR section. If you need to utilize the credit towards an unpaid invoice from Migration, you can do so using the same steps as a new FAD (open a case).

Eligible CCO Products

Clipp Products eligible to use CCO

All On-Page Products (including LDP & Specialty Publications)

All Off-Page Products (Including LDP) & All Digest Products

Valpak Products eligible to use CCO

CP44

For any questions around quantities that can/should be sold, or sales strategies, please email Darrin

Watson Darrin.Watson@clipp.com or Phil Rotindo Phil.Rotindo@clipp.com



\$50 for each qualifying CCO order

Doubled to \$100 if a new customer

Starts this week!

Details will be sent to qualified sellers in Clipp and Clipp/Valpak markets

Questions

- Tomorrow: Salesforce Open Office Hour
- Follow up Optional Q&A Call – *Invite Coming Soon*
- Today: Follow up email with recording and instructions
- As always, please submit any questions via CCO Support Salesforce Case