

CPQ Exercise Guide – Digital

Create a Digital Campaign

PREREQUISITES:

1. Complete steps in the [Log into Salesforce for CPQ Training](#) document.
2. Complete steps in the [Add Leads for CPQ Training](#) document.

GOAL: Create a quote for a Digital ad.

TASKS:

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

TIME:

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

Step 1 - Create Quote

- Select the **Accounts** tab.
- Select an account name from the *Recently Viewed* list.
- Note the account name selection.
- Select the **Quick Quote** button.

Account Used for Digital Scenario: _____

Step 2 – Choose a Product

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

You can also choose
I WILL CHOOSE LATER

If you choose your product here skip to step 5

Step 3 - Select Add Products

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

Product

Select Product ⓘ

- ✓ 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

Q-445360 **Edit Quote**

[Distribution](#)
[Commission](#)
[Clone](#)
[Update](#)
[Generate Document](#)
[Add Products](#)
[Quick Save](#)
[Calculate](#)
[Cancel](#)
[Save](#)

Quote Information

Account Name **Casey Power Foundation** Frequency Title

Sales Campaign

This quote has no line items. Click on Add Products button to select products.

Step 4 - Choose the Product

- Click on Clipper Digital and click SELECT

Q-446386 **Product Selection**

PRODUCT NAME	PRODUCT DESCRIPTION	PRODUCT CODE	PRODUCT FAMILY
<input type="checkbox"/> Clipper On Page	Magazine Pages that are Printed, Bound, and Mailed	CL-ONPAGE	Clipper Print
<input type="checkbox"/> Single Panel Insert w/Digital	Single Panel Insert w/ Digital	Wrapper_Bundle_Single_Panel_Dig	Valpak Print
<input type="checkbox"/> Clipper Off Page	Products Printed & inserted in between Magazine Pages as part of Magazine publication	CL-OFFPAGE	Clipper Print
<input type="checkbox"/> Single Panel Insert 2-Sided	Coupon, Premium, 4/4, Coated	CP44	Valpak Print
<input type="checkbox"/> Clipper LDP Postcard	LDP Postcard (DML) Printed and Mailed Outside the Magazine Publication	CL-LDPP	Clipper Print
<input type="checkbox"/> Clipper Misc Charge	Clipper Miscellaneous Charge	CL-MISC	Other
<input type="checkbox"/> Digital Package	Digital Package	Digital_Package	Valpak Digital
<input type="checkbox"/> Call Tracking	Call Tracking Products	Call_Tracking	Valpak Digital
<input checked="" type="checkbox"/> Clipper Digital	Call Tracking, Local Flavor Online Coupon, CCO Deals Independent w/o any Print	CL-DIGITAL	Clipper Digital
<input type="checkbox"/> Single Panel Insert 1-Side	Coupon, Premium, 4/0, Coated	CP40	Valpak Print
<input type="checkbox"/> 2 Panel Flyer, 2-Sided	2 Panel Flyer, Premium, 4/4, Coated	2FP44	Valpak Print

Step 5 - Configure Products

- From the list of products, choose Digital Display and click SAVE

Q-446386 **Configure Products**

Clipper Digital

DIGITAL

PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION
<input type="radio"/> CL-LOFLAVOR	Local Flavor Online Coupon	Local Flavor Online Coupon
<input checked="" type="radio"/> CL-SMARTDISP	Digital Display	Digital Display (Geo-Fencing)
<input type="radio"/> CL-SMARTDISPWP	Digital Display with Landing Pages	Digital Display with Landing Pages
<input type="radio"/> CL-CTV	Connected TV	Connected TV
<input type="radio"/> CL-CTCONVIRZA	Call Tracking	Clipper Call Tracking

Step 6 - Change start date and monthly quantity

- FIRST, select the **Quick Save** button to save the selections you've made up to this point.
- Now that your product has been chosen, you will need to put in the start date.
- Now you will also need to put in the quantity and hit **Quick Save** again.
- Remember when putting in the quantity to you a period instead of a comma.

Q-446386 | Edit Quote
Total: USD 0.00

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

Quote Information

Account Name **7 Brew Coffee** Frequency 12 Title

Sales Campaign Search Campaigns

#	PRODUCT NAME	START ...	QUANTI...	VOLUME	DIST	PROM...	PROMO ...	RATE CARD	LIST UNIT PRICE	ADDI...	PREV...	% C...	APPROVAL	END DATE	NET TOTAL
1	Clipper Digital	9/1/2024						0.000							
2	Digital Display	8/29/2024	100	50,000				0.000	USD 0.000						USD 0.00

Step 7 - Clone the ads to multiple mail dates

- Click on the Clone button
- *Note be patient sometimes it takes a couple of seconds after you hit it to go to the next screen*

Q-446386 | Edit Quote
Total: USD 1,298.00

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

Quote Information

Account Name **7 Brew Coffee** Frequency 12 Title

Sales Campaign Search Campaigns

#	PRODUCT NAME	START ...	QUANTI...	VOLUME	DIST	PROM...	PROMO ...	RATE CARD	LIST UNIT PRICE	ADDI...	PREV...	% C...	APPROVAL	END DATE	NET TOTAL
1	Clipper Digital	9/1/2024						0.000							
2	Digital Display	9/1/2024	100	100,000				12.980	USD 12.980					9/1/2024	USD 1,298.00

Step 8 - Clone the ads to multiple mail dates

- Select the number of additional mail dates you would like and hit Clone

Clone Quote Lines Back **Clone**

Clone Options

Choose Source Bundle 1:Clipper Digital-9/1/2024

Number of NEW Bundles to Create 3

Keep Same Dates

Keep Same Deal Names

Step 9 - Quick save and check distribution

- Hit Quick Save and Check your mail dates and quantities.
- Hit Save to return to the quote

Q-446386 | Edit Quote
Total: USD 5,192.00

Distribution Commission Clone Update Generate Document Add Products Quick Save Calculate Cancel Save

Quote Information

Account Name **7 Brew Coffee** Frequency **12** Title

Sales Campaign Search Campaigns

#	PRODUCT NAME	START ...	QUANTI...	VOLUME	DIST	PROM...	PROMO ...	RATE CARD	LIST UNIT PRICE	ADDI...	PREV...	% C...	APPROVAL	END DATE	NET TOTAL
1	Clipper Digital	9/1/2024						0.000							
2	Digital Display	9/1/2024	100	100,000				12.980	USD 12.980					9/1/2024	USD 1,298.00
3	Clipper Digital	10/1/2024						0.000							
4	Digital Display	10/1/2024	100	100,000				12.980	USD 12.980					10/1/2024	USD 1,298.00
5	Clipper Digital	11/1/2024						0.000							
6	Digital Display	11/1/2024	100	100,000				12.980	USD 12.980					11/1/2024	USD 1,298.00
7	Clipper Digital	12/1/2024						0.000							
8	Digital Display	12/1/2024	100	100,000				12.980	USD 12.980					12/1/2024	USD 1,298.00

Step 10 - Submit for Approval

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

Step 11 - Generate Document

- Select the **Generate Document** button.
- Select the **Preview** button.

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

- Select the X to close the Quote Preview window.

Quote Preview

1 / 4 | - 125% + | [Icons]

PARTICIPATION AGREEMENT

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

Step 12 - Advertiser E-sign

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

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

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

message to the inbox and open the email in the inbox.

- Select the **Sign Now** button.
- Scroll to the **Advertiser's Authorized Representative** signature line indicated by the Start flag.
- Click on the **Click here to sign** link.

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.

Agreement #: Q-446386-1

Advertiser's Authorized Representative: *Click here to sign

Valpak Authorized Representative:

Title:

Agreement Date: 07/22/2024

Next

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

- E-sign on the signature line indicated by the Adobe Sign flag.
- Select the **Apply** button.

Type Draw Image Mobile

Sign

Advertiser Signature

Clear

Close Apply

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

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

By signing, I agree to this document, the [Consumer Disclosure](#) and to utilize electronic signatures.

Click to Sign

Step 13 - Sales Rep Co-sign

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

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

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

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

- Scroll to the **Valpak Authorized Representative** signature line indicated by the Start flag.
- Click on the **Click here to sign** link.
- Choose the **Type** option (options include: type, draw, image, mobile).
- Review e-signature.

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

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

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

Step 14 - Submit Payment Request

- In Salesforce, use the search or recently viewed accounts to locate and select the account related to the signed agreement.
- Scroll to the **Chargent Orders** section under the Related tab on the right-hand side of the window.
- Select the order number link (e.g., ORD-xxxxxxxx).

The screenshot shows the Salesforce interface with the 'Related' tab selected. Under the 'Related' tab, there are two sections: 'Contacts (1)' and 'Chargent Orders (1)'. The 'Contacts (1)' section lists Michael Jeffers as the Owner, with his email (ravinsunkiller666@gmail.com) and phone number ((727) 571-3867). The 'Chargent Orders (1)' section lists a single order with the number 'ORD-000000351', which is highlighted in blue. A red callout bubble with the number '58' points to this order number. Below the order number, the last payment is listed as 'Credit Card' and the status is 'Michael Jeffers'. The next transaction date is '10/1/2018'. Both sections have a 'View All' link at the bottom.

- Select the **Payment Request** button.

- Review the contact information and include optional information to the advertiser in the *Additional Notes* field.
- Select the **Next** button.
- Select the **Finish** button.

Advertisers receive an authorization request for the minimum amount via email.