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.

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

Account Used for Digital Scenario:

I will Choose Later

Create a quote and opportunity by choosing a product and related fields. Select Create to begin quote creation or Cancel to return to the account. Select the 1 will Choose Later' option to create a quote without a product. Further modifications can be made at the next screen.
Product
Cancel Create
Select Product
Clipper On Page [CL-ONPAGE]
Clipper Digital [CL-DIGITAL]
Solo Postcards [Wrapper_SOLO]

Edit Quote	Distribution	Commission	Clone	Update	Generate Document	Add Products	Quick Save	Calculate	C	ancel	Save
Quote Information	\$ 4										
Acco	unt Name Casey F	Power Foundation			Frequency 😧	9		1	litle 🤇		
Sales	Campaign 🕜 Sear	rch Campaigns									

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

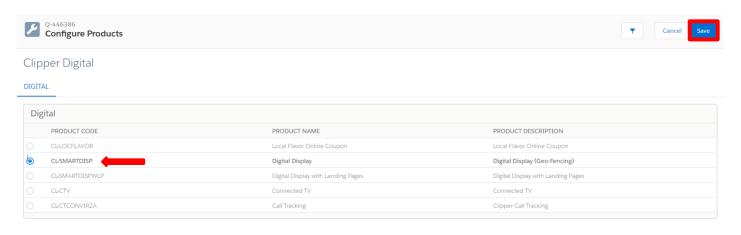
Step 4 - Choose the Product

• Click on Clipper Digital and click SELECT

Product Selection	Q Search Products	8 Q	
PRODUCT NAME	PRODUCT DESCRIPTION	PRODUCT CODE	PRODUCT FAMILY
Clipper On Page	Magazine Pages that are Printed, Bound, and Mailed	CL-ONPAGE	Clipper Print
Single Panel Insert w/Digital	Single Panel Insert w/ Digital	Wrapper_Bundle_Single_Panel_Dig	Valpak Print
Clipper Off Page	Products Printed & inserted in between Magazine Pages as part of Magazine publicatio	n CL-OFFPAGE	Clipper Print
Single Panel Insert 2-Sided	Coupon, Premium, 4/4, Coated	CP44	Valpak Print
Clipper LDP Postcard	LDP Postcard (DML) Printed and Mailed Outsid the Magazine Publication	e CL-LDPP	Clipper Print
Clipper Misc Charge	Clipper Miscellaneous Charge	CL-MISC	Other
Digital Package	Digital Package	Digital_Package	Valpak Digital
Call Tracking	Call Tracking Products	Call_Tracking	Valpak Digital
🗸 Clipper Digital 🛛 🛑	Call Tracking, Local Flavor Online Coupon, CCC Deals Independent w/o any Print	CL-DIGITAL	Clipper Digital
Single Panel Insert 1-Side	Coupon, Premium, 4/0, Coated	CP40	Valpak Print
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



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 Q Total: USD 0.0			Dist	tribution	Commissio	on Clone	Update	Generate Document	Add P	roducts	Quick	Save	Cancel	Save	¢▼
\sim	Quote Information															
	Ace	count Name	7 Brew Coffee	2				Frequency 🕝	12				Title	• •		
	Sale	es Campaign 🛛 🔞	Search Car	npaigns												
#	PRODUCT NAME	START	QUANTI	VOLUME	DIST	PROM	PROMO	RATE CARD	LIST UNIT PRICE	ADDI	PREV	% C	APPROVAL	END DATE	1	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

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\sim	Quote Information																
	Ac	count Name	7 Brew Coffee	2				Frequency 🕝	12				Title	0			
	Sal	es Campaign (Search Car	npaigns													
#	PRODUCT NAME	START	QUANTI	VOLUME	DIST	PROM	PROMO	RATE CARD	LIST UNIT PRICE	ADDI	PREV	% C	APPROVAL	END DATE		NET TOTAL	. F
1	Ƴ Clipper Digital	9/1/2024						0.000									
2	Digital Display	9/1/2024	100	100,000				12.980	USD 12.980					9/1/2024	USI	D 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					* Required Information
	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

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\sim	Juote Information														
	Ac	count Name	7 Brew Coffee	,				Frequency 🔞	12				Title	0	
	Sale	es Campaign (Search Car	npaigns											
#	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

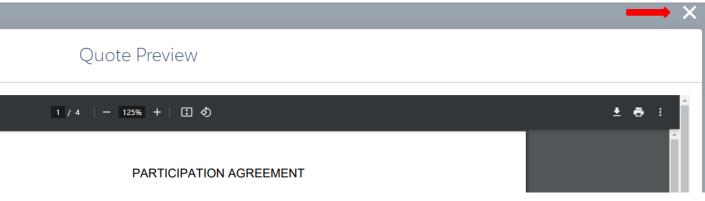
• Select the **Submit for Approval** button.

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.



• 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-111111-1111111-11111").

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
 Title:

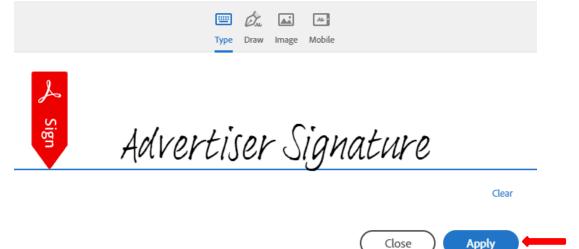
 Representative:
 * Click here to sign

 Valpak Authorized
 Agreement Date:

 07/22/2024
 07/22/2024

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.



• 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 <u>Consumer Disclosure</u> 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., <u>crm_user5@clipper.com</u>) 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).

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		•							
Owner									
ravinsunkiller666@gmail.com									
3 (727) 571-3867									
View All									
ers (1)		•							
58		•							
Credit Card Michael Jeffers									
10/1/2018									
View All									
	ravinsunkiller666@gmail.com (727) 571-3867 View All ers (1) 58 TCredit Card Michael Jeffers 10/1/2018	Owner ravinsunkiller666@gmail.com							

• 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.