CPQ Exercise Guide – Digital

Create a Digital Campaign

PREREQUISITES:

1. Complete steps in the <u>Log into Salesforce for CPQ Training</u> document.
2. Complete steps in the <u>Add Leads for CPQ Training</u> 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

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   Cancel   Create

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

Step 3 - Select Add Products

Step 4 - Choose the Product

- Click on Clipper Digital and click SELECT

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.

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*

Step 8 - Clone the ads to multiple mail dates
- Select the number of additional mail dates you would like and hit Clone

Step 9 - Quick save and check distribution
- Hit Quick Save and Check your mail dates and quantities.
- Hit Save to return to the quote

#	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

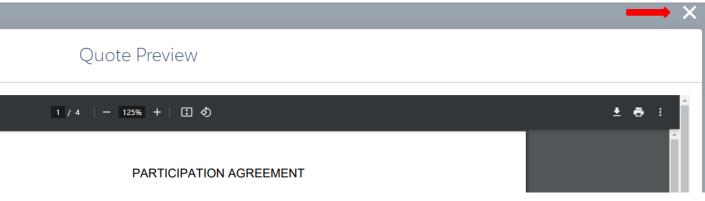## Step 10 - Submit for Approval

- 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-111111-11111111-1111").

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

- 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.

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.

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-xxxxxxxxx).

- 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.