CPQ Exercise Guide – Half Page

Create a half page ad for a Clipp local book

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 half page ad in a local book.

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.

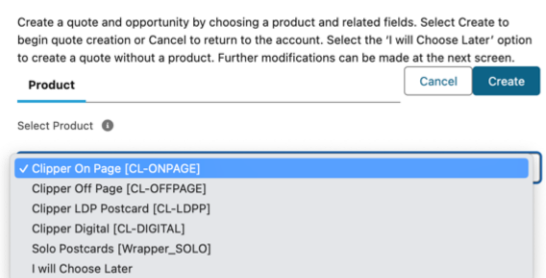
*Account Used for Scenario 1:*______________________________

Step 2 – Choose a Product

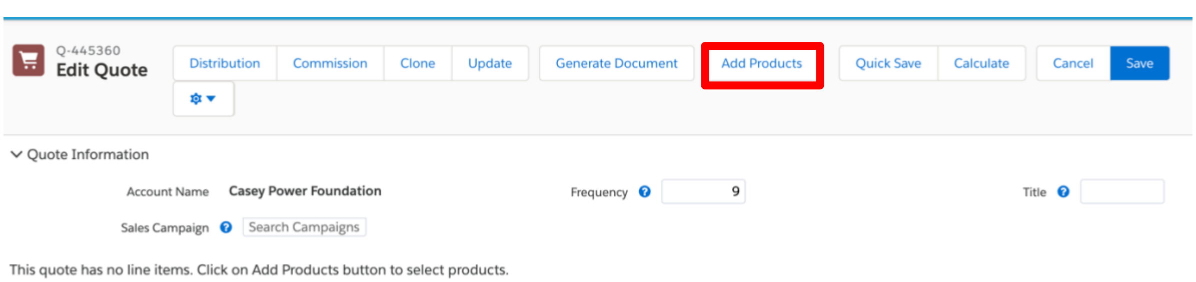
From the pull down menu, choose a product and click CREATE

You can also choose
I WILL CHOOSE LATER

If you choose your product here skip to step 5

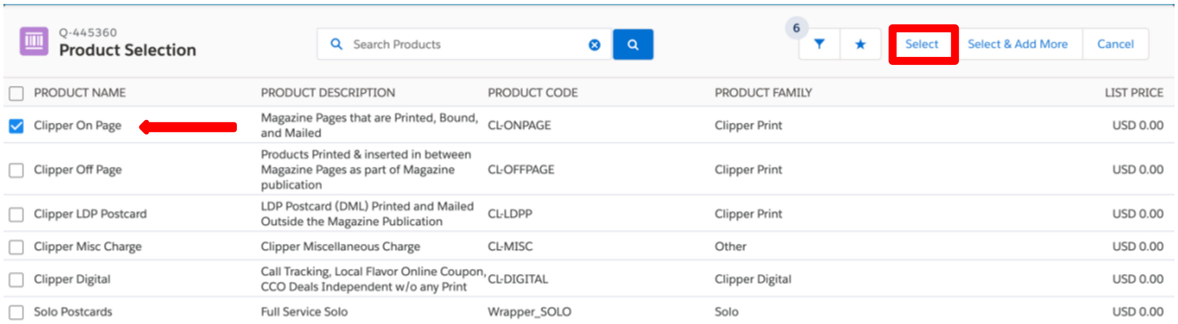


Step 3 - Select Add Products



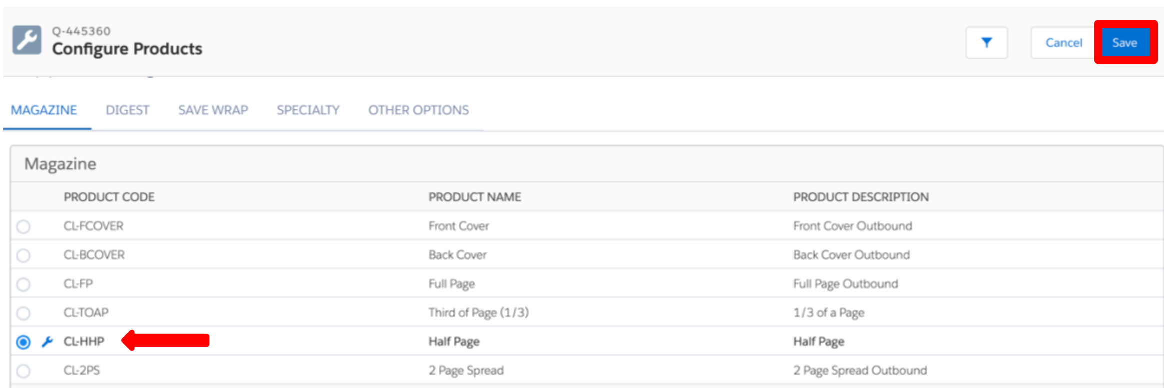
Step 4 - Choose the Product

- Click on Clipper On Page and click SELECT



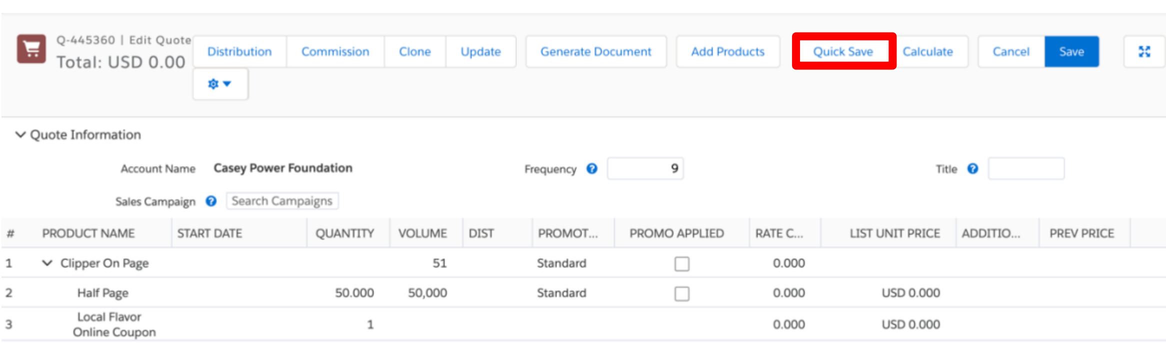
Step 5 - Configure Products

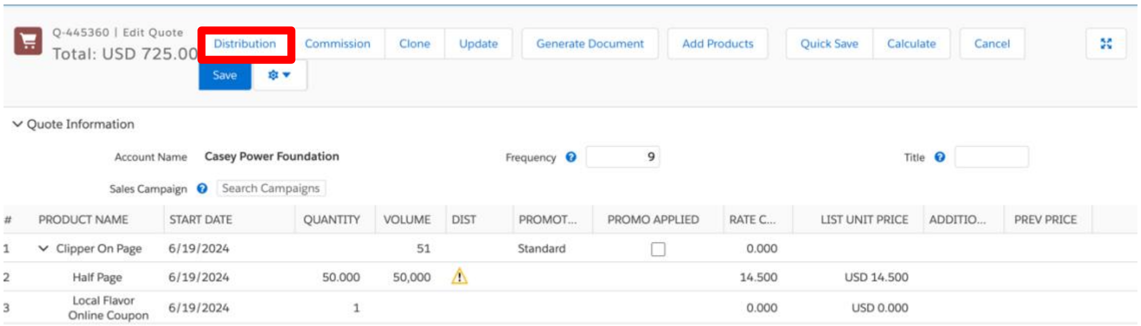
- From the list of products, choose CL-HHP (half page) and click SAVE



Step 6 - Distribution

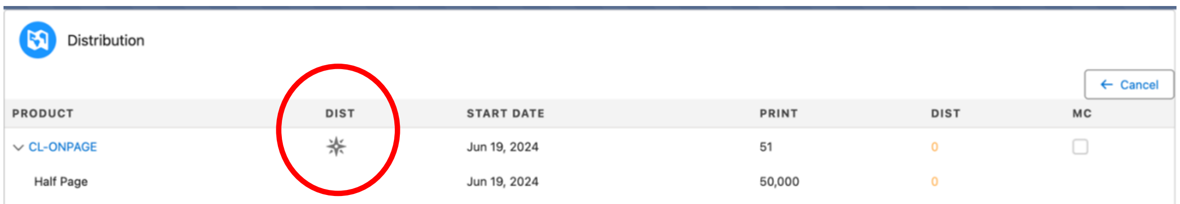
- FIRST, select the **Quick Save** button to save the selections you've made up to this point.
- Now that your product has been chosen, click Distribution
- *Notice that the page on LocalFlavor.com (Clipp.com)*
  has already been selected along with the half page ad.





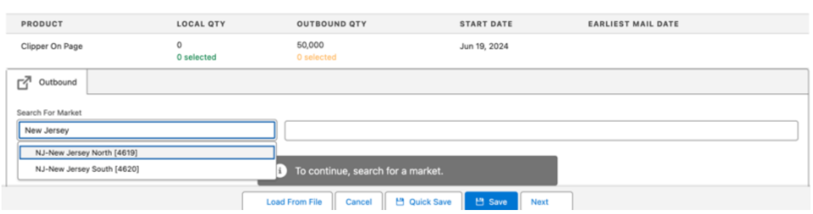
Step 7 - Distribution

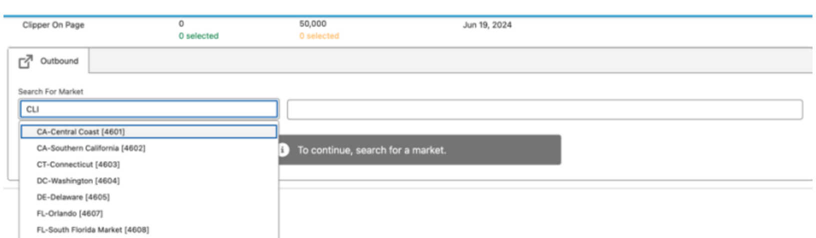
- Click the Star
- *Note Distribution amounts will change to the book quantity once the areas are chosen*



Step 8 - Market Search

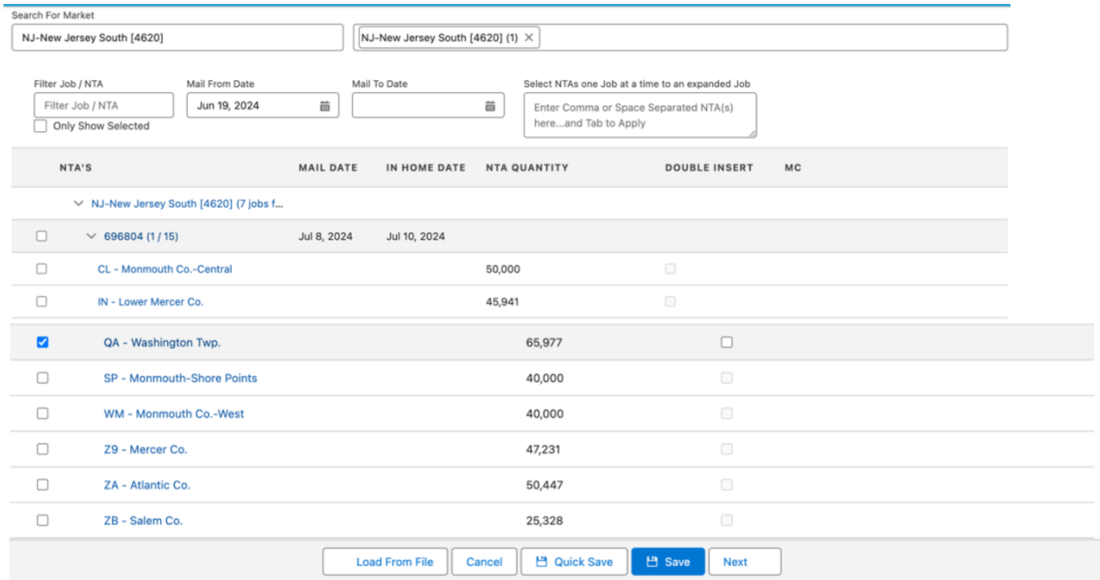
- Search for your market. Type in the beginning of your state or market and the choices will appear.
- You can also type in CLIPPER and all the Clipp markets will be listed.





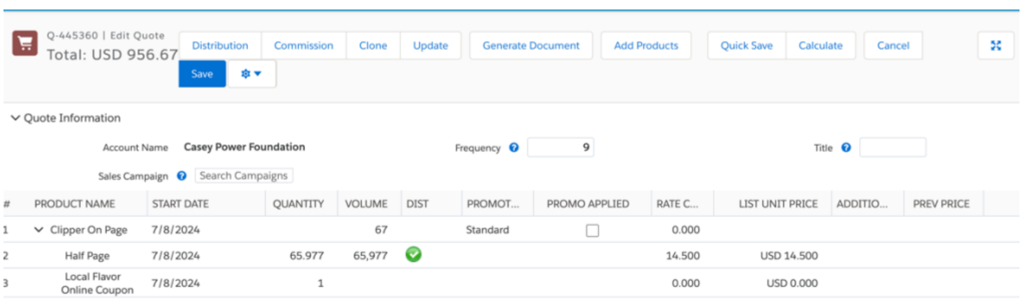
Step 9 – Choose the local book

- Select the local book, quick save and Save



Step 10 –

- Review and Quick Save

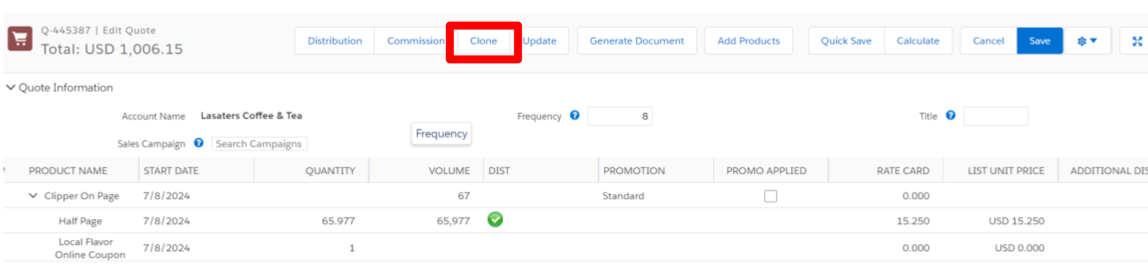


Step 11 - Review List Unit Price

- Leave the local *List Unit Price* at the included rate card value.

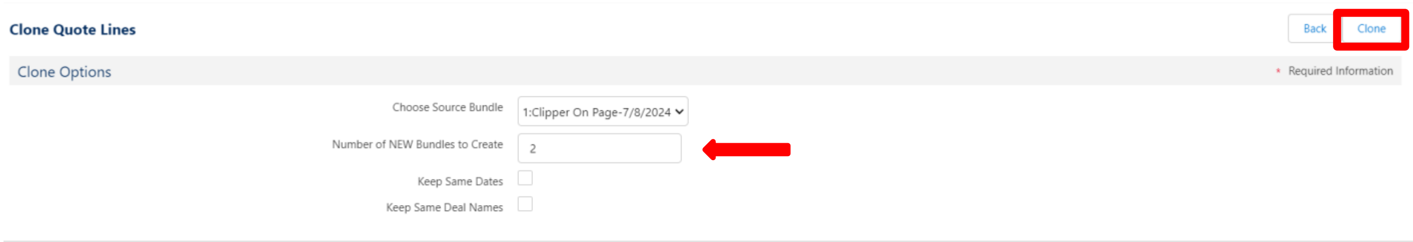
Step 12 - Clone the ads to multiple mail dates

- 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*



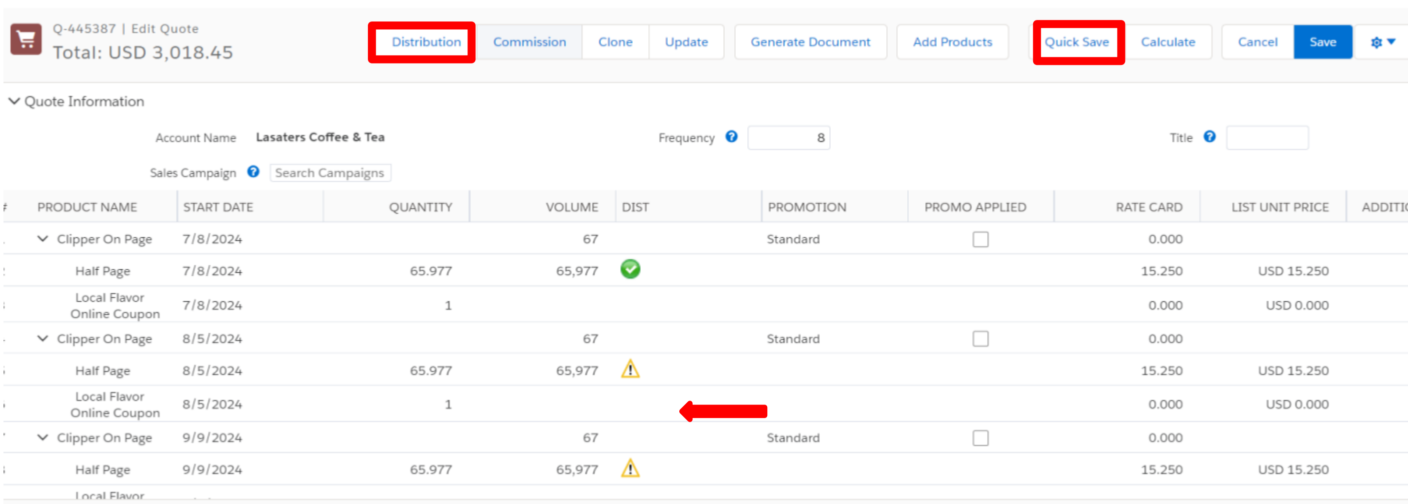
Step 13 - Clone the ads to multiple mail dates

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



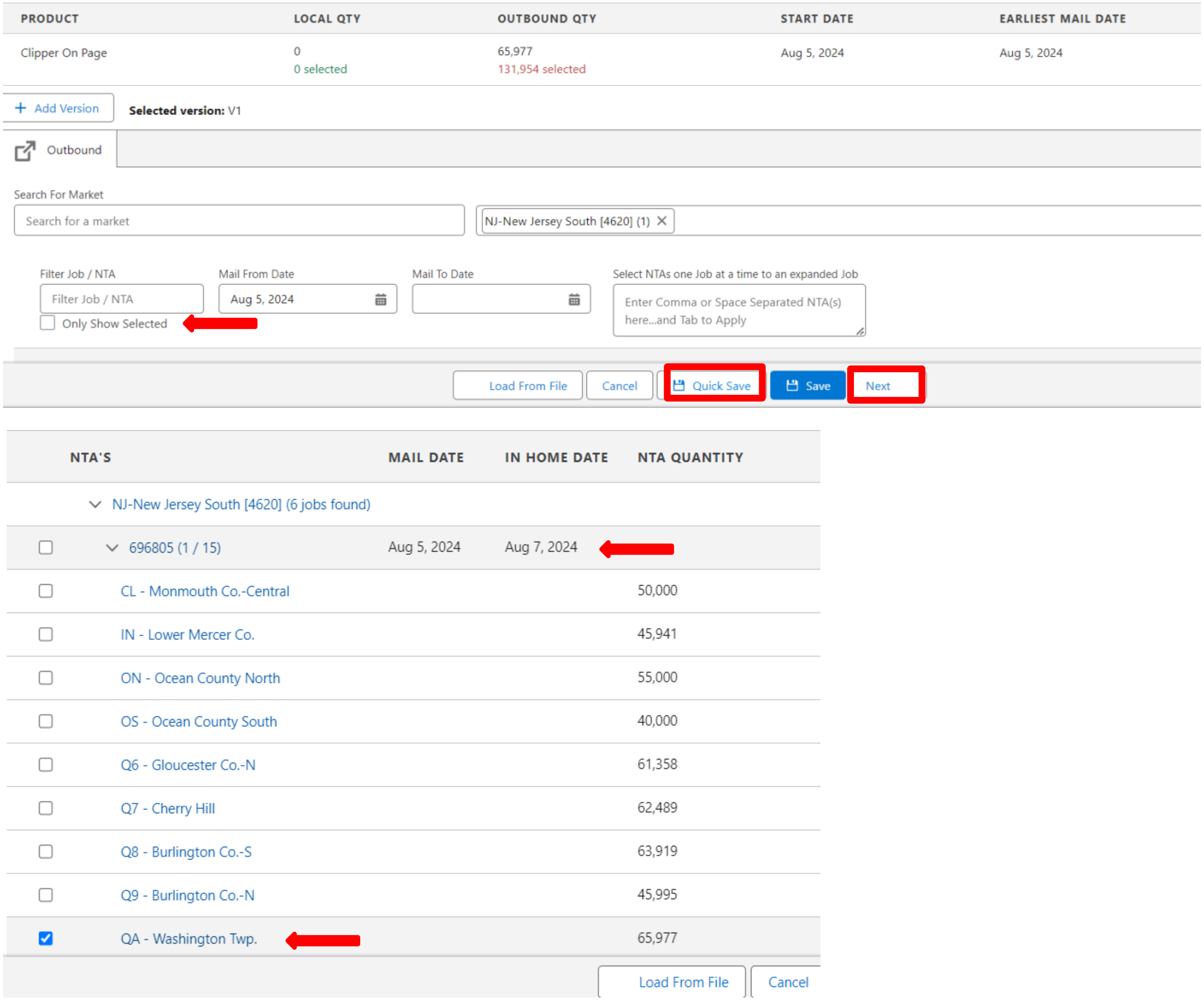
Step 14 - Quick save and check distribution

- Hit the Quick save button and notice distribution for the additional mail dates has triangles
- Click on distribution to confirm mail dates and mailing areas
- *Note cloning will always choose the next available mail dates so you will have to adjust them if not consecutive*



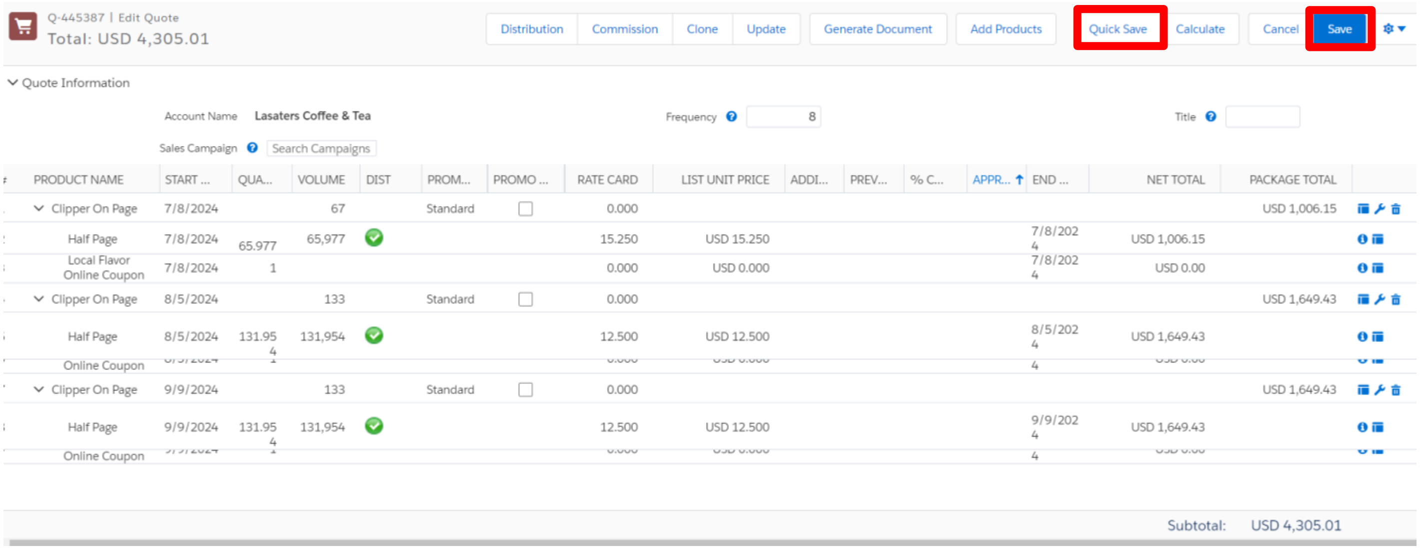
Step 15 - Verify distribution and mail date

- Uncheck the only show selected box
- Scroll down double check the mail date and area then hit quick save and next
- Once you get to the last mail date click the save button
- *Note if you wish to change areas or mail dates just unselect each and choose the new one*



Step 16 - Quick save and check distribution

- Hit Quick Save and the Save to return to the quote



Step 17 - Submit for Approval

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

  If the quote is at or above the threshold, quotes are automatically approved (the Status indicates "Approved," and the Approval field contains a green flag). If the quote is below the threshold, the Status indicates "Pending Manager Approval," and the Approval field contains the person icon.

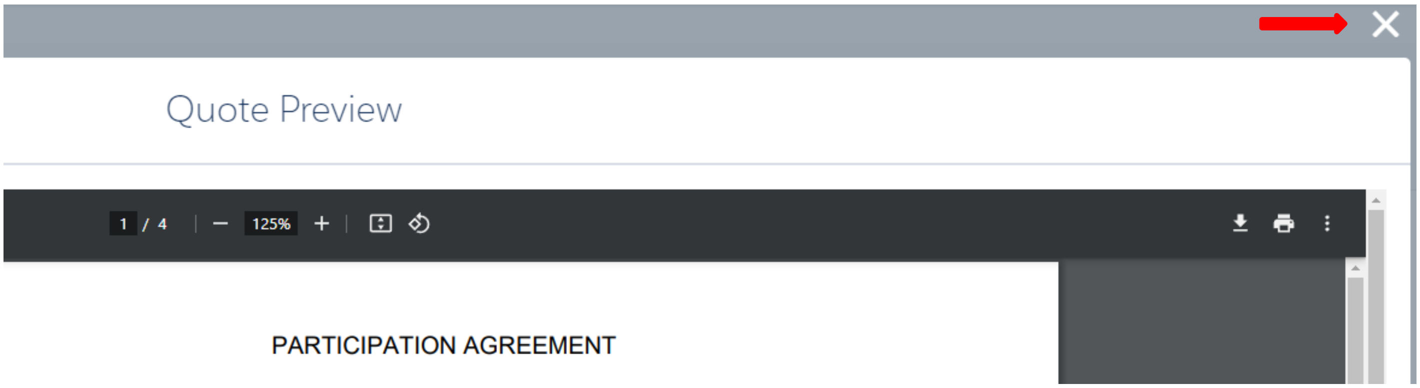
  At or Above Threshold Approved =  *Below Threshold Pending Manager Approval =* 

Step 18 - 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.

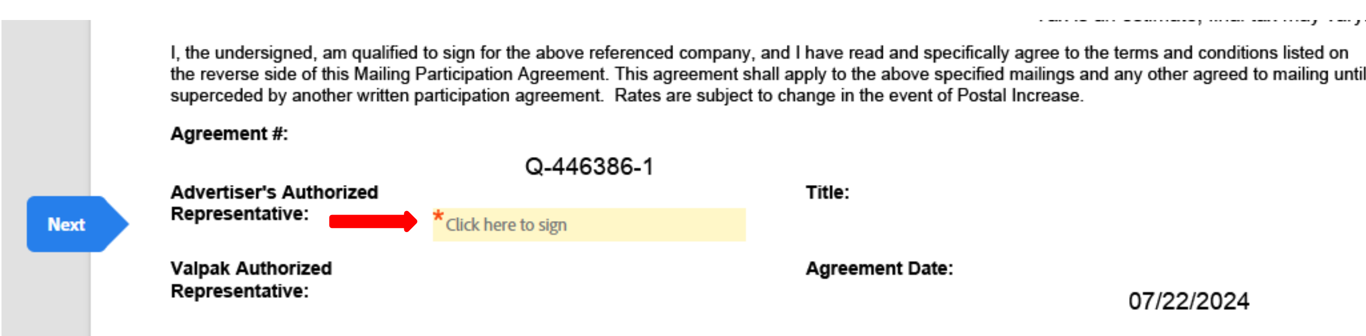
Step 19 - Advertiser E-sign

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.

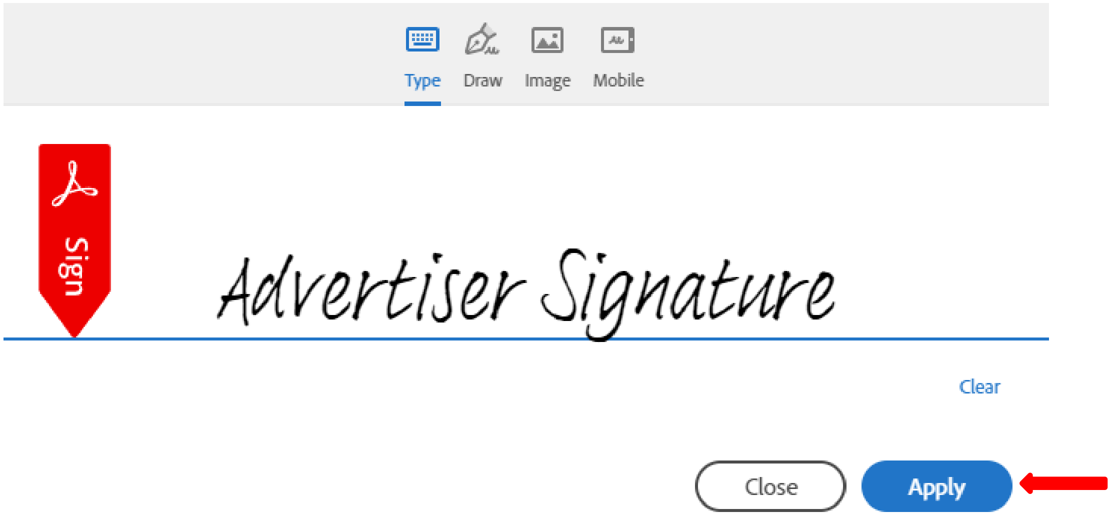
- Go to the inbox of the personal email address used for this related contact record and locate the email from your name via Ad. adobesign@adobesign.com (the subject line is “Signature requested on Q-111111-11111111-1111”).

  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.

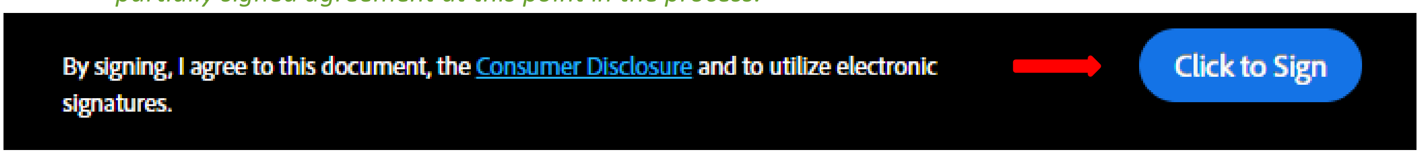


- Choose the **Type** option (options include: type, draw, image, mobile).
- E-sign on the signature line indicated by the Adobe Sign flag.
- Select the **Apply** button.



- 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.



Step 20 - 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.

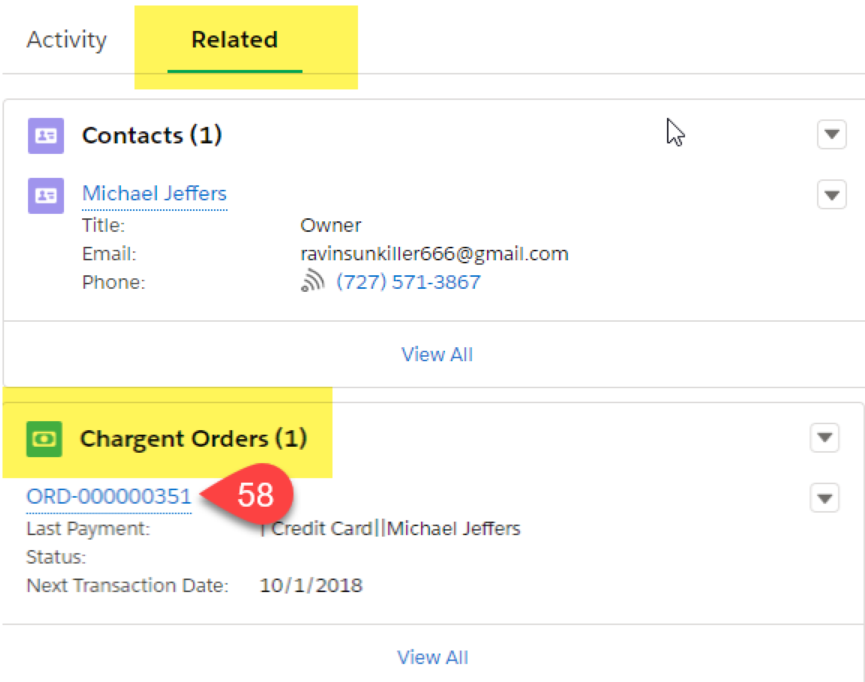
- Select the **Apply** button.

- 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 21 - 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.