

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.

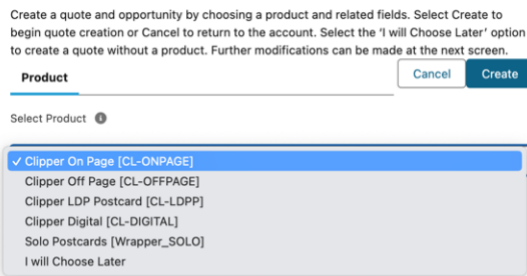
Account Used for Scenario 1: _____

Step 2 – Choose a Product

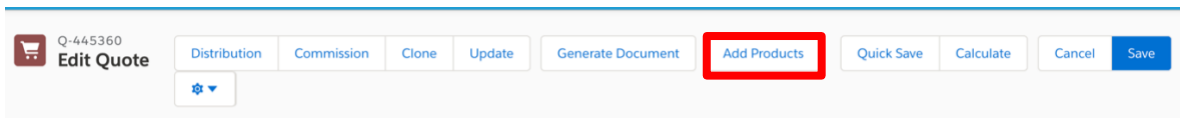
From the pull down menu, choose a product and click CREATE

You can also choose
I WILL CHOOSE LATER

If you choose your product here skip to step 5



Step 3 - Select Add Products



Quote Information

Account Name **Casey Power Foundation**

Sales Campaign

Frequency ⓘ

Title ⓘ

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

Step 4 - Choose the Product

- Click on Clipper On Page and click SELECT

Q-445360 Product Selection

Search Products

Select Select & Add More Cancel

| PRODUCT NAME | PRODUCT DESCRIPTION | PRODUCT CODE | PRODUCT FAMILY | LIST PRICE |
|---|---|--------------|-----------------|------------|
| <input checked="" type="checkbox"/> Clipper On Page | Magazine Pages that are Printed, Bound, and Mailed | CL-ONPAGE | Clipper Print | USD 0.00 |
| <input type="checkbox"/> Clipper Off Page | Products Printed & inserted in between Magazine Pages as part of Magazine publication | CL-OFFPAGE | Clipper Print | USD 0.00 |
| <input type="checkbox"/> Clipper LDP Postcard | LDP Postcard (DML) Printed and Mailed Outside the Magazine Publication | CL-LDPP | Clipper Print | USD 0.00 |
| <input type="checkbox"/> Clipper Misc Charge | Clipper Miscellaneous Charge | CL-MISC | Other | USD 0.00 |
| <input type="checkbox"/> Clipper Digital | Call Tracking, Local Flavor Online Coupon, CCO Deals Independent w/o any Print | CL-DIGITAL | Clipper Digital | USD 0.00 |
| <input type="checkbox"/> Solo Postcards | Full Service Solo | Wrapper_SOLO | Solo | USD 0.00 |

Step 5 - Configure Products

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

Q-445360 Configure Products

Cancel Save

MAGAZINE DIGEST SAVE WRAP SPECIALTY OTHER OPTIONS

| PRODUCT CODE | PRODUCT NAME | PRODUCT DESCRIPTION |
|---|---------------------|------------------------|
| <input type="radio"/> CL-FCOVER | Front Cover | Front Cover Outbound |
| <input type="radio"/> CL-BCOVER | Back Cover | Back Cover Outbound |
| <input type="radio"/> CL-FP | Full Page | Full Page Outbound |
| <input type="radio"/> CL-TOAP | Third of Page (1/3) | 1/3 of a Page |
| <input checked="" type="radio"/> CL-HHP | Half Page | Half Page |
| <input type="radio"/> CL-2PS | 2 Page Spread | 2 Page Spread Outbound |

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.

Q-445360 | Edit Quote Total: USD 0.00

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

Quote Information

Account Name Casey Power Foundation Frequency 9 Title

Sales Campaign Search Campaigns

| # | PRODUCT NAME | START DATE | QUANTITY | VOLUME | DIST | PROMOT... | PROMO APPLIED | RATE C... | LIST UNIT PRICE | ADDITIO... | PREV PRICE |
|---|----------------------------|------------|----------|--------|------|-----------|--------------------------|-----------|-----------------|------------|------------|
| 1 | Clipper On Page | | | 51 | | Standard | <input type="checkbox"/> | 0.000 | | | |
| 2 | Half Page | | 50,000 | 50,000 | | Standard | <input type="checkbox"/> | 0.000 | USD 0.000 | | |
| 3 | Local Flavor Online Coupon | | 1 | | | | | 0.000 | USD 0.000 | | |

Q-445360 | Edit Quote
Total: USD 725.00

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

Save

Quote Information

Account Name **Casey Power Foundation** Frequency Title

Sales Campaign

| # | PRODUCT NAME | START DATE | QUANTITY | VOLUME | DIST | PROMOT... | PROMO APPLIED | RATE C... | LIST UNIT PRICE | ADDITIO... | PREV PRICE |
|---|----------------------------|------------|----------|--------|------|-----------|--------------------------|-----------|-----------------|------------|------------|
| 1 | Clipper On Page | 6/19/2024 | | 51 | | Standard | <input type="checkbox"/> | 0.000 | | | |
| 2 | Half Page | 6/19/2024 | 50,000 | 50,000 | | | | 14.500 | USD 14.500 | | |
| 3 | Local Flavor Online Coupon | 6/19/2024 | 1 | | | | | 0.000 | USD 0.000 | | |

Step 7 - Distribution

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

Distribution ← Cancel

| PRODUCT | DIST | START DATE | PRINT | DIST | MC |
|-----------|------|--------------|--------|------|--------------------------|
| CL-ONPAGE | | Jun 19, 2024 | 51 | 0 | <input type="checkbox"/> |
| Half Page | | Jun 19, 2024 | 50,000 | 0 | |

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.

| PRODUCT | LOCAL QTY | OUTBOUND QTY | START DATE | EARLIEST MAIL DATE |
|-----------------|-----------------|----------------------|--------------|--------------------|
| Clipper On Page | 0 0 selected | 50,000 0 selected | Jun 19, 2024 | |

Outbound

Search For Market

New Jersey

NJ-New Jersey North [4819]

NJ-New Jersey South [4820]

To continue, search for a market.

Load From File Cancel Quick Save Save Next

| PRODUCT | LOCAL QTY | OUTBOUND QTY | START DATE | EARLIEST MAIL DATE |
|-----------------|-----------------|----------------------|--------------|--------------------|
| Clipper On Page | 0 0 selected | 50,000 0 selected | Jun 19, 2024 | |

Outbound

Search For Market

CA

CA-Central Coast [4801]

CA-Southern California [4802]

CT-Connecticut [4803]

DC-Washington [4804]

DE-Delaware [4805]

FL-Orlando [4807]

FL-South Florida Market [4809]

To continue, search for a market.

Step 9 – Choose the local book

- Select the local book, quick save and Save

Search For Market
 NJ-New Jersey South [4620] NJ-New Jersey South [4620] (1) X

Filter Job / NTA Mail From Date Mail To Date Select NTAs one Job at a time to an expanded Job
 Filter Job / NTA Jun 19, 2024 Enter Comma or Space Separated NTA(s) here...and Tab to Apply
 Only Show Selected

| NTA'S | MAIL DATE | IN HOME DATE | NTA QUANTITY | DOUBLE INSERT | MC |
|---|----------------------------|--------------|--------------|--------------------------|----|
| ▼ NJ-New Jersey South [4620] (7 jobs f... | | | | | |
| <input type="checkbox"/> | ▼ 696804 (1 / 15) | Jul 8, 2024 | Jul 10, 2024 | | |
| <input type="checkbox"/> | CL - Monmouth Co.-Central | | 50,000 | <input type="checkbox"/> | |
| <input type="checkbox"/> | IN - Lower Mercer Co. | | 45,941 | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> | QA - Washington Twp. | | 65,977 | <input type="checkbox"/> | |
| <input type="checkbox"/> | SP - Monmouth-Shore Points | | 40,000 | <input type="checkbox"/> | |
| <input type="checkbox"/> | WM - Monmouth Co.-West | | 40,000 | <input type="checkbox"/> | |
| <input type="checkbox"/> | Z9 - Mercer Co. | | 47,231 | <input type="checkbox"/> | |
| <input type="checkbox"/> | ZA - Atlantic Co. | | 50,447 | <input type="checkbox"/> | |
| <input type="checkbox"/> | ZB - Salem Co. | | 25,328 | <input type="checkbox"/> | |

Load From File Cancel Quick Save Save Next

Step 10 –

- Review and Quick Save

Q-445360 | Edit Quote
 Total: USD 956.67

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

Save

▼ Quote Information

Account Name Casey Power Foundation Frequency 9 Title

Sales Campaign Search Campaigns

| # | PRODUCT NAME | START DATE | QUANTITY | VOLUME | DIST | PROMOT... | PROMO APPLIED | RATE C... | LIST UNIT PRICE | ADDITIO... | PREV PRICE |
|---|----------------------------|------------|----------|--------|------|-----------|--------------------------|-----------|-----------------|------------|------------|
| 1 | ▼ Clipper On Page | 7/8/2024 | | 67 | | Standard | <input type="checkbox"/> | 0.000 | | | |
| 2 | Half Page | 7/8/2024 | 65,977 | 65,977 | ✓ | | | 14,500 | USD 14,500 | | |
| 3 | Local Flavor Online Coupon | 7/8/2024 | 1 | | | | | 0.000 | USD 0.000 | | |

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*

Q-445387 | Edit Quote
 Total: USD 1,006.15

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

▼ Quote Information

Account Name Lasaters Coffee & Tea Frequency 8 Title

Sales Campaign Search Campaigns Frequency

| # | PRODUCT NAME | START DATE | QUANTITY | VOLUME | DIST | PROMOTION | PROMO APPLIED | RATE CARD | LIST UNIT PRICE | ADDITIONAL DIS |
|---|----------------------------|------------|----------|--------|------|-----------|--------------------------|-----------|-----------------|----------------|
| 1 | ▼ Clipper On Page | 7/8/2024 | | 67 | | Standard | <input type="checkbox"/> | 0.000 | | |
| | Half Page | 7/8/2024 | 65,977 | 65,977 | ✓ | | | 15,250 | USD 15,250 | |
| | Local Flavor Online Coupon | 7/8/2024 | 1 | | | | | 0.000 | USD 0.000 | |

Step 13 - 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 On Page-7/8/2024

Number of NEW Bundles to Create 2

Keep Same Dates

Keep Same Deal Names

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*

Q-445387 | Edit Quote
Total: USD 3,018.45

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

Quote Information

Account Name Lasaters Coffee & Tea Frequency 8 Title

Sales Campaign Search Campaigns

| # | PRODUCT NAME | START DATE | QUANTITY | VOLUME | DIST | PROMOTION | PROMO APPLIED | RATE CARD | LIST UNIT PRICE | ADDITIONAL |
|---|----------------------------|------------|----------|--------|------|-----------|--------------------------|-----------|-----------------|------------|
| 1 | Clipper On Page | 7/8/2024 | | 67 | | Standard | <input type="checkbox"/> | 0.000 | | |
| 2 | Half Page | 7/8/2024 | 65.977 | 65,977 | ✓ | | | 15.250 | USD 15.250 | |
| 3 | Local Flavor Online Coupon | 7/8/2024 | 1 | | | | | 0.000 | USD 0.000 | |
| 4 | Clipper On Page | 8/5/2024 | | 67 | | Standard | <input type="checkbox"/> | 0.000 | | |
| 5 | Half Page | 8/5/2024 | 65.977 | 65,977 | ⚠ | | | 15.250 | USD 15.250 | |
| 6 | Local Flavor Online Coupon | 8/5/2024 | 1 | | | | | 0.000 | USD 0.000 | |
| 7 | Clipper On Page | 9/9/2024 | | 67 | | Standard | <input type="checkbox"/> | 0.000 | | |
| 8 | Half Page | 9/9/2024 | 65.977 | 65,977 | ⚠ | | | 15.250 | USD 15.250 | |
| 9 | Local Flavor Online Coupon | 9/9/2024 | 1 | | | | | 0.000 | USD 0.000 | |

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*

| PRODUCT | LOCAL QTY | OUTBOUND QTY | START DATE | EARLIEST MAIL DATE |
|-----------------|-----------------|----------------------------|-------------|--------------------|
| Clipper On Page | 0 0 selected | 65,977 131,954 selected | Aug 5, 2024 | Aug 5, 2024 |

+ Add Version

Selected version: V1

Outbound

Search For Market

Search for a market

NJ-New Jersey South [4620] (1) X

Filter Job / NTA

Filter Job / NTA

Only Show Selected

Mail From Date

Aug 5, 2024

Mail To Date

Select NTAs one Job at a time to an expanded Job

Enter Comma or Space Separated NTA(s) here...and Tab to Apply

Load From File

Cancel

Quick Save

Save

Next

| NTA'S | MAIL DATE | IN HOME DATE | NTA QUANTITY |
|--|-------------|--------------|--------------|
| <p>▼ NJ-New Jersey South [4620] (6 jobs found)</p> | | | |
| <input type="checkbox"/> ▼ 696805 (1 / 15) | Aug 5, 2024 | Aug 7, 2024 | |
| <input type="checkbox"/> CL - Monmouth Co.-Central | | | 50,000 |
| <input type="checkbox"/> IN - Lower Mercer Co. | | | 45,941 |
| <input type="checkbox"/> ON - Ocean County North | | | 55,000 |
| <input type="checkbox"/> OS - Ocean County South | | | 40,000 |
| <input type="checkbox"/> Q6 - Gloucester Co.-N | | | 61,358 |
| <input type="checkbox"/> Q7 - Cherry Hill | | | 62,489 |
| <input type="checkbox"/> Q8 - Burlington Co.-S | | | 63,919 |
| <input type="checkbox"/> Q9 - Burlington Co.-N | | | 45,995 |
| <input checked="" type="checkbox"/> QA - Washington Twp. | | | 65,977 |

Load From File Cancel

Step 16 - Quick save and check distribution

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

Q-445387 | Edit Quote
Total: USD 4,305.01

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

Quote Information

Account Name **Lasaters Coffee & Tea** Frequency 8 Title

Sales Campaign Search Campaigns

| # | PRODUCT NAME | START ... | QUA... | VOLUME | DIST | PROM... | PROMO ... | RATE CARD | LIST UNIT PRICE | ADDL... | PREV... | % C... | APPR... ↑ | END ... | NET TOTAL | PACKAGE TOTAL | |
|---|----------------------------|-----------|---------|---------|------|----------|--------------------------|-----------|-----------------|---------|---------|--------|-----------|----------|--------------|---------------|--|
| ✓ | Clipper On Page | 7/8/2024 | | 67 | | Standard | <input type="checkbox"/> | 0.000 | | | | | | | | USD 1,006.15 | |
| | Half Page | 7/8/2024 | 65.977 | 65,977 | | | | 15.250 | USD 15.250 | | | | | 7/8/2024 | USD 1,006.15 | | |
| | Local Flavor Online Coupon | 7/8/2024 | 1 | | | | | 0.000 | USD 0.000 | | | | | 7/8/2024 | USD 0.00 | | |
| ✓ | Clipper On Page | 8/5/2024 | | 133 | | Standard | <input type="checkbox"/> | 0.000 | | | | | | | | USD 1,649.43 | |
| | Half Page | 8/5/2024 | 131.954 | 131,954 | | | | 12.500 | USD 12.500 | | | | | 8/5/2024 | USD 1,649.43 | | |
| | Online Coupon | 8/5/2024 | 4 | | | | | 0.000 | USD 0.000 | | | | | 8/5/2024 | USD 0.00 | | |
| ✓ | Clipper On Page | 9/9/2024 | | 133 | | Standard | <input type="checkbox"/> | 0.000 | | | | | | | | USD 1,649.43 | |
| | Half Page | 9/9/2024 | 131.954 | 131,954 | | | | 12.500 | USD 12.500 | | | | | 9/9/2024 | USD 1,649.43 | | |
| | Online Coupon | 9/9/2024 | 4 | | | | | 0.000 | USD 0.000 | | | | | 9/9/2024 | USD 0.00 | | |
| | | | | | | | | | | | | | | | Subtotal: | USD 4,305.01 | |

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.

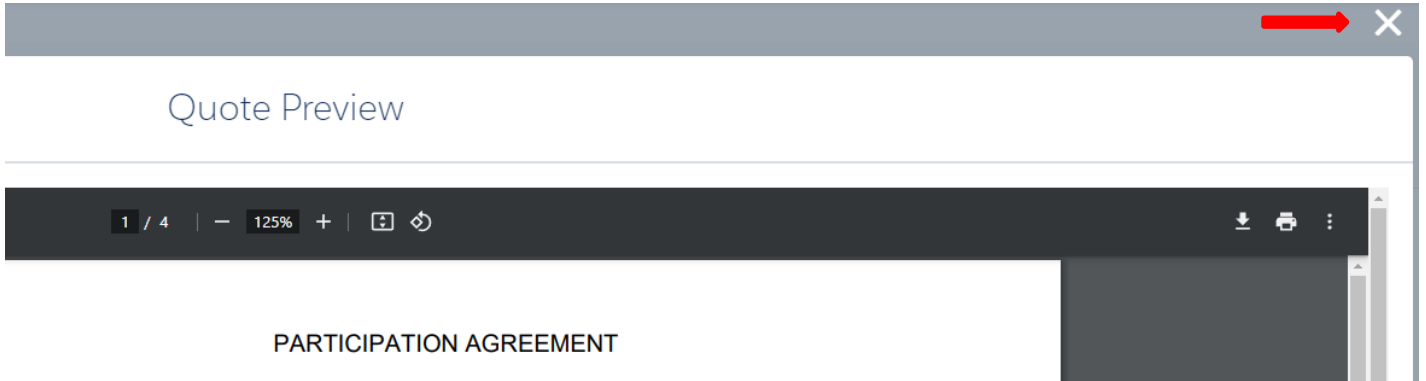
At or Above Threshold Approved = Below Threshold Pending Manager Approval =

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.

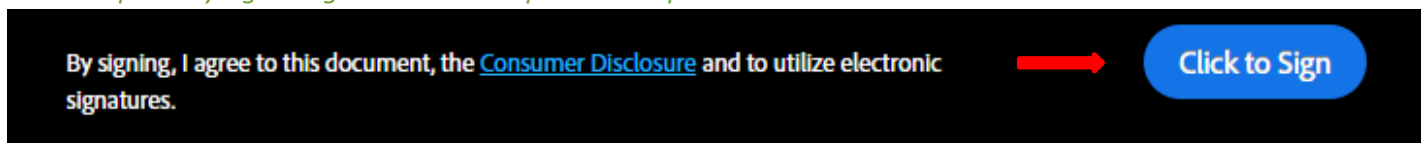


- Choose the **Type** option (options include: type, draw, image, mobile).
- E-sign on the signature line indicated by the Adobe Sign flag.
- Select the **Apply** button.



- 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.

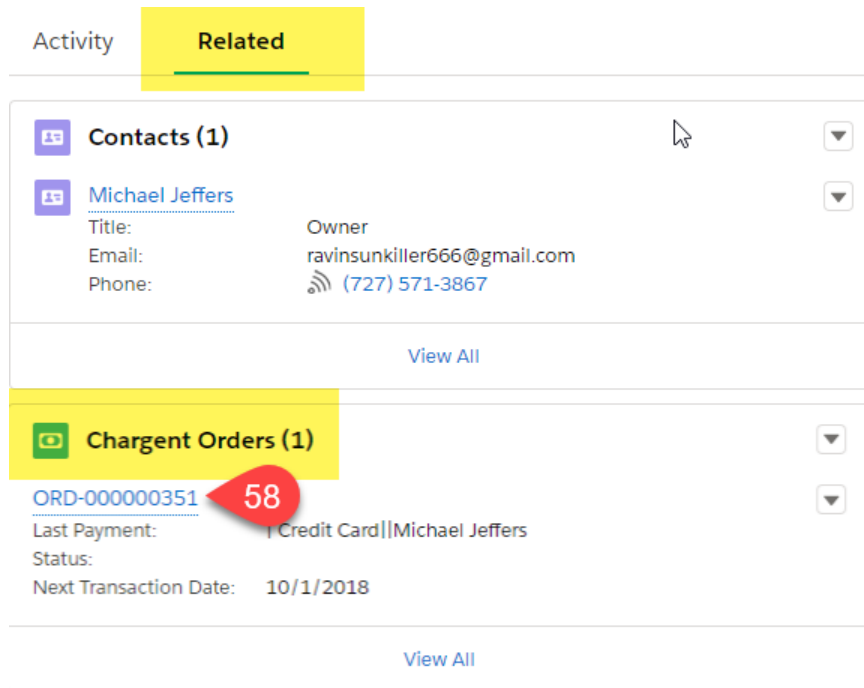
- Select the **Apply** button.

- 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-xxxxxxx).



- 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.