

CPQ Exercise Guide – Half Page CCO

Create a CCO half page ad for a Clipp local book

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 4

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.

The screenshot shows a 'Product' dropdown menu with a 'Cancel' button and a 'Create' button. Below the dropdown, the text 'Select Product' is followed by a list of product options: 'Clipper On Page [CL-ONPAGE]' (which is selected and highlighted in blue), 'Clipper Off Page [CL-OFFPAGE]', 'Clipper LDP Postcard [CL-LDPP]', 'Clipper Digital [CL-DIGITAL]', 'Solo Postcards [Wrapper_SOLO]', and 'I will Choose Later'.

Step 3 - Select Add Products

Q-445360 **Edit Quote**

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 On Page and click SELECT

Q-445360 **Product Selection**


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).
- Notice the wrench icon next to the product you selected. If you wish to add layout preferences, click on the wrench. When you are finished DO NOT HIT SAVE YET.

Q-445360 **Configure Products**

MAGAZINE DIGEST SAVE WRAP SPECIALTY OTHER OPTIONS

PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION
<input type="radio"/> CLFCOVER	Front Cover	Front Cover Outbound
<input type="radio"/> CLBCOVER	Back Cover	Back Cover Outbound
<input type="radio"/> CLFP	Full Page	Full Page Outbound
<input type="radio"/> CLTOAP	Third of Page (1/3)	1/3 of a Page
<input checked="" type="radio"/>  CLHHP	Half Page	Half Page
<input type="radio"/> CL2PS	2 Page Spread	2 Page Spread Outbound

Step 6 - Configure CCO

- Click on the other options tab and check the CL-CCODEAL box
- Notice the wrench icon next to the CL-CCODEAL check box. Click on that wrench to configure your CCO Deal

Clipper On Page

MAGAZINE DIGEST SAVE WRAP SPECIALTY **OTHER OPTIONS**

Other Options		
PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION
<input checked="" type="checkbox"/> CL-LOCFLAVOR	Local Flavor Online Coupon	Local Flavor Online Coupon
<input checked="" type="checkbox"/> CL-CCODEAL	CCO Deal	CCO Deal
<input type="checkbox"/> CL-CTCONVIRZA	Call Tracking	Clipper Call Tracking

Step 7 - Configure CCO

- Click on the CCO Deal Options and select your deal. If it is a custom deal select custom and fill in the CCO Deal Price & CCO Deal Value with the correct amounts.
- Once you have chosen the correct information hit the Save button and Save again on the next screen.

CCO Deal

CCO Deal Options: --None--

CCO Replenishment Deal: --None--

- 10 For 20
- 15 For 30
- 20 For 40
- 25 For 50
- Custom

Step 8 - 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 and the CCO Deal is on line 4.*

Quote Information

Account Name: **Jens Flowers** Frequency: **12** Title:

Sales Campaign:

#	PRODUCT NAME	START DATE	QUANTITY	VOLUME	DIST	PROMOT...	PROMO APPLIED	RATE CARD	LIST UNIT PRICE	ADDIT...	PREV ...	% CHA...	APPR...	EN
1	Clipper On Page	6/22/2024		51		CCO	<input checked="" type="checkbox"/>							
2	Half Page	6/22/2024	50.000	50,000										6/4
3	Local Flavor Online Coupon	6/22/2024	1					0.000	USD 0.000					6/4
4	CCO Deal	6/22/2024	0					0.000	USD 0.000					6/4

Q-445362 | Edit Quote
Total: USD 960.00

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

Quote Information
Account Name: Jens Flowers Frequency: 12 Title:

Sales Campaign:

#	PRODUCT NAME	START DATE	QUANTITY	VOLUME	DIST	PROMOT...	PROMO APPLIED	RATE CARD	LIST UNIT PRICE	ADDIT...	PREV ...	% CHA...	APPR...	EN
1	Clipper On Page	6/22/2024		51		CCO	<input checked="" type="checkbox"/>							6/4
2	Half Page	6/22/2024	50,000	50,000										6/4
3	Local Flavor Online Coupon	6/22/2024	1					0.000	USD 0.000					6/4
4	CCO Deal	6/22/2024	0					0.000	USD 0.000					6/4

Step 9 - Distribution

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

Distribution

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 10 - 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 (4619)

NJ-New Jersey South (4620)

To continue, search for a market.

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

CLI

CA-Central Coast (4601)

CA-Southern California (4602)

CT-Connecticut (4603)

DC-Washington (4604)

DE-Delaware (4605)

FL-Orlando (4607)

FL-South Florida Market (4608)

To continue, search for a market.

Step 11 – 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: Filter Job / NTA Mail From Date: Jun 19, 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

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 12 –

- Review and Quick Save

Q-445362 | Edit Quote Total: USD 1,266.76 Distribution Commission Clone Update Generate Document Add Products Quick Save Calculate Cancel Save ⚙️ 🔄

Quote Information

Account Name: Jens Flowers Frequency: 12 Title: Sales Campaign: Search Campaigns

#	PRODUCT NAME	START DATE	QUANTITY	VOLUME	DIST	PROMOT...	PROMO APPLIED	RATE CARD	LIST UNIT PRICE	ADDIT...	PREV ...	% CHA...	APPR...	E
1	▼ Clipper On Page	7/8/2024		152		CCO	<input checked="" type="checkbox"/>							
2	Half Page	7/8/2024	65,977	65,977			<input checked="" type="checkbox"/>							7
3	Local Flavor Online Coupon	7/8/2024	1					0.000	USD 0.000					7
4	CCO Deal	7/8/2024	85											7

Step 13 - Review CCO Quantity

- Notice the CCO Quantity is listed as 85 (varies per distribution) and that there is no rate card price.
- Click Save and return to the quote.

Step 14 – Go back to the account page to set CCO location

- Go back to the main account page for this quote

- Click on the tab that says location
- (Quick hint: if the address on this account is the CCO location then scroll down on main page and copy the Location address)

Account: Robert's Sub Shop

+ Follow New Task Launch Quick Opportunity

Contacts (1) Cases (0) Opportunities (3) Quotes (3) Contracts (0) Files

Transactions (1) Chargent Payment Requ... Payment Consents (1) VPO Orders (Print Accou... VPO Orders (Digital Acc... Orde

Show All (24)

We found no potential duplicates of this Account.

Details Support Billing Dates Statement AR Sales **Locations** Feed

Account Owner	Franchise
Robert Irwin	Valpak of Kings County
Account Name	Franchise ID
Robert's Sub Shop	4,343
Category	Phone
Dining / Food / Beverage [2]	(555) 555-5555
Sub Category	Fax
Sub Shops / Deli [134]	
Sub Category 3	Website
Other [71]	
NAIC	Parent Account

Step 15 – Creating CCO Location

- Select Create New Location
- Enter in the information for the CCO location business
- Hit Create Location for Account

Account Locations

* Location Title
Harding Street Location

Location Status
Active

Address
5025 ha

Address
5025 Harding Pike

City
Nashville

State/Province
TN

Zip/Postal Code
37205

Country
United States

Phone
555-555-5555

WebSite (Valid http:// or https:// format Required)
https://www.robertssubshop.com

Location Hours
M-F 10am - 7pm

Description

Previous **Create Location for Account**

Step 16 – Create CCO Deal

- Go Back to the Support tab and Click on the Support Tab
- Choose Data
- Use the drop down box, select CCO Request and hit next

Account
Robert's Sub Shop

+ Follow New Task Laur

Type	VPO Status	Phone	Category	Account Ext ID	Total Balance Due
Prospect		(555) 555-5555	Dining / Food / Beverage [2]		USD 0.00

Contacts (1) Cases (0) Opportunities (3) Quotes (3) Contracts (0) Files (0) Chargent Orders (2) Transactions (0)

VPO Orders (Print Account...) VPO Orders (Digital Account...) Orders (0) Invoices (0)

Show All (24)

We found no potential duplicates of this Account.

Details **Support** Billing Dates Statement AR Sales Locations Feed

Quick Case Create

* Category
 Operations
 Billing
 Artwork
 Data

* Type
--None--
List Request
Research Request
Call Tracking Request
CCO Request

Next

Step 17 = CCO Deal Instructions

- Fill in the information for you deal and hit next
- On the next screen upload any files or images needed and hit next
- The next screen will say “Successfully Created New Request

The screenshot shows the 'Deal Details' form for 'Robert's Sub Shop'. The form is divided into several sections:

- Deal Details:** Includes fields for Deal Price (\$15), Deal Value (\$30), Value Description (Casual Dining), Certificate Instructions, and Expiration Length (180 Days). A deal title is generated: "Deal Title: \$15 for \$30 Worth of Casual Dining".
- References:** Includes Client Logo Reference (ref website) and Image References (see attached).
- Disclaimer Options:** Radio buttons for "Use Standard" (selected) and "Include Specific Fine Print".
- Other:** Includes a search field for "Request Opened On Behalf Of (Optional)" and a large text area for "Comments".

At the bottom right, there are "Previous" and "Next" buttons, with the "Next" button highlighted by a red box.

Step 18 – Return to the account screen and Click on Data Requests

The screenshot shows the account overview for 'Robert's Sub Shop'. At the top, there are navigation buttons: "+ Follow", "New Task", "Launch", "Quick Opportunity", and "Quick Que". Below this is a table with account details:

Type	VPO Status	Phone	Category	Account Exit ID	Total Balance Due
Prospect		(555) 555-5555	Dining / Food / Beverage [2]		USD 0.00

Below the table is a horizontal bar with various icons and counts for different account types:

- Contacts (1)
- Cases (0)
- Opportunities (3)
- Quotes (3)
- Contracts (0)
- Files (0)
- Charge Orders (2)
- Transactions (1)
- Churned Prospects (0)
- VPO Orders (Print Account) (0)
- VPO Orders (Digital Account) (0)
- Orders (0)
- Invoices (0)
- Credit Notes (0)
- Debit Notes (0)
- Payments (0)
- Refunds (0)
- Data Requests (2)** (highlighted with a red box)
- Notes (0)
- Assets (0)
- Account Team (0)
- Account History (4)

A "Show Less" link is located at the bottom right of the bar.

Step 19 – Copy the data request number next to the CCO you wish to use

Accounts > Robert's Sub Shop
Data Requests
 2 items • Updated 3 minutes ago

	<input type="checkbox"/> Data Request Name	Franchise Name	Data Reques...	Record Type
1	<input type="checkbox"/> DR00017966	Valpak of Kings County	New	CCO Request
2	<input type="checkbox"/> DR00017969	Valpak of Kings County	New	CCO Request

Step 20 – Return to your CCO quote

- Scroll down on the quote page to the Ad/Data Requests Assignments
- Pick your first CCO line (example is line 4)
- Hit the edit pencil on the Data Request line
- Paste in the number of you CCO Data request here
- Once this is complete you can submit for approval

Ad/Data Request Assignm...

Account Ad Requests

Account Data Requests

Locations

Ad/Data Requests Assignment(6)

Search Phrase

	<input type="checkbox"/> N..	Effective ...	Product Display	Ad Reques...	Case ...	Data Requ...	Data ...
1	<input type="checkbox"/>	2 08/26/2024	-Half Page [CL-HHP]				
2	<input type="checkbox"/>	4 08/26/2024	-CCO Deal [CL-CCODEAL]			DR00017966	DR00017966
3	<input type="checkbox"/>	6 09/30/2024	-Half Page [CL-HHP]				
4	<input type="checkbox"/>	8 09/30/2024	-CCO Deal [CL-CCODEAL]				
5	<input type="checkbox"/>	10 11/25/2024	-Half Page [CL-HHP]				
6	<input type="checkbox"/>	12 11/25/2024	-CCO Deal [CL-CCODEAL]				

Step 21 Assign location to your CCO

- Click on the locations tab here
- Click on the check box to assign the location to this quote and click save

Quote Line
CCO Deal ▼

Location Based Deal ⓘ Inactive Locations Exclude

<input type="checkbox"/>	Location Name	Address Street	Address City	Add...	Address Zip	Status
<input checked="" type="checkbox"/>	CCO Deal	5025 Harding Pike	Nashville	TN	37205	Active

Step 22 - Submit for Approval

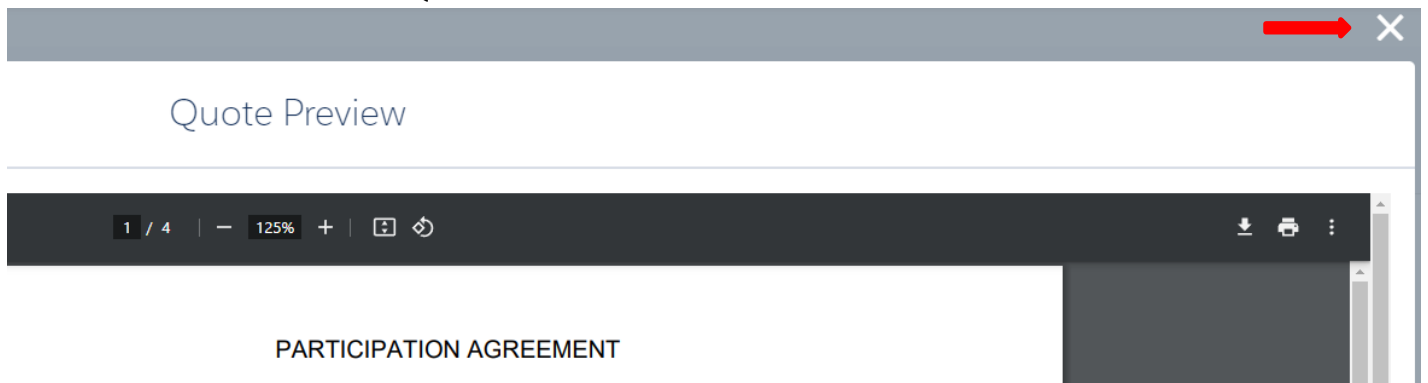
- Select the **Submit for Approval** button.

Step 23 - 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 24 - 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

Title:

Valpak Authorized Representative:

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

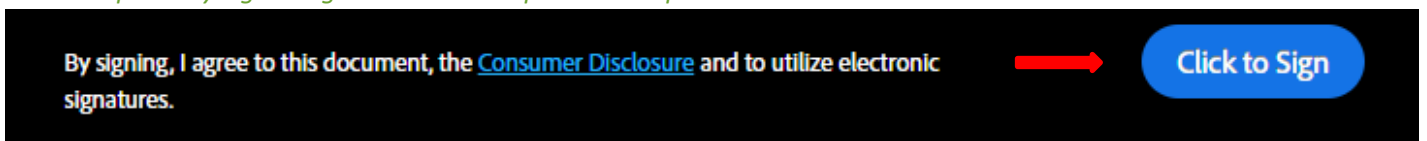
Advertiser Signature

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 25 - 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.