CPQ Exercise Guide – Scenario 3

Create a LDP-V

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 an LDPV postcard in an integrated market.

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

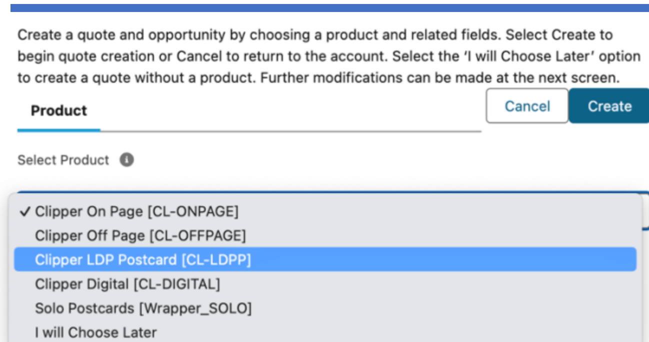
- Select the **Accounts** tab.
- Select an account name from the *Recently Viewed* list.
- Note the account name selection.
- Select the **Quick Quote** button.

*Account Used for Scenario 1:*________________________________

Step 2 – Choose a Product

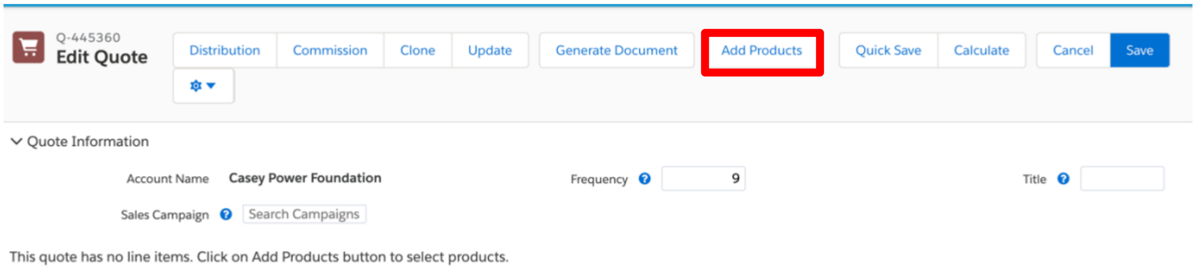
From the pull down menu, choose a product and click CREATE

You can also choose
I WILL CHOOSE LATER



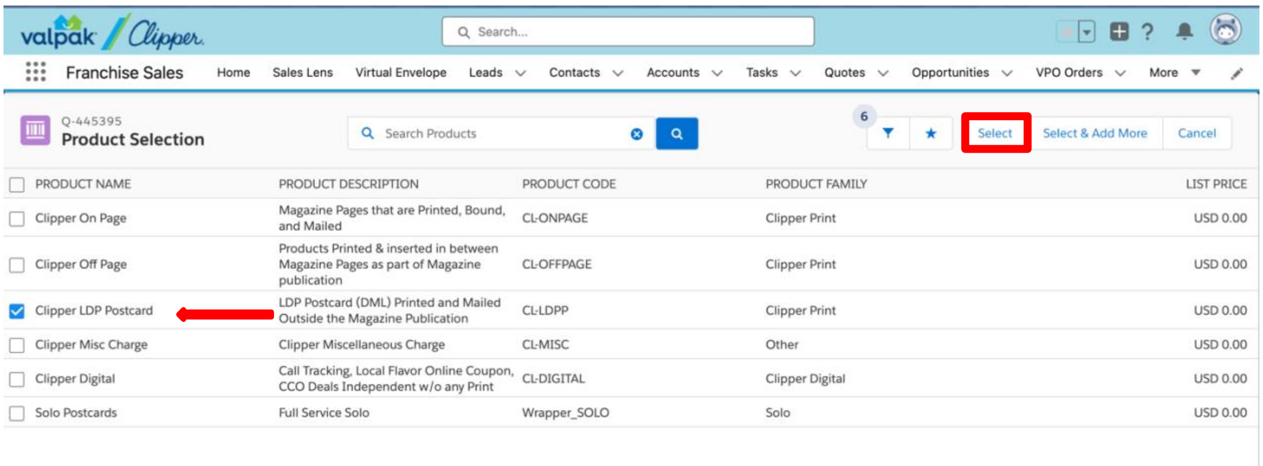
If you choose your product here skip to step 5

Step 3 - Select Add Products



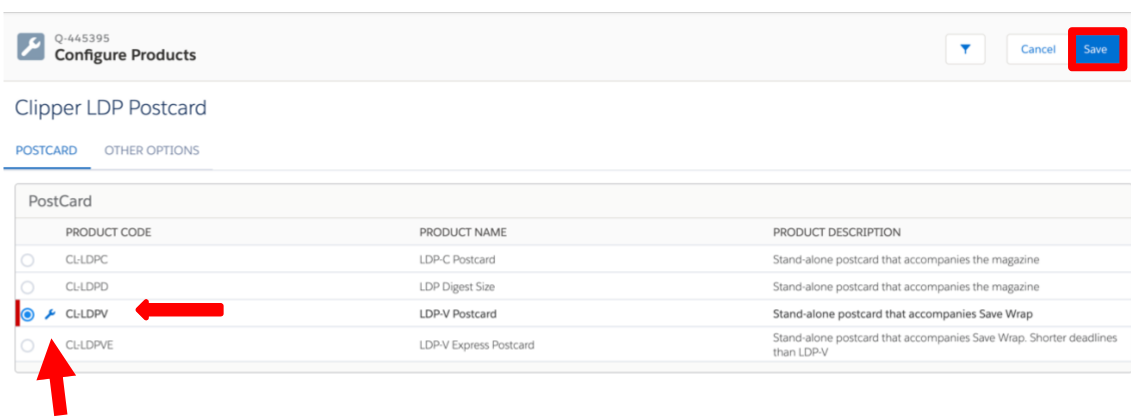
Step 4 - Choose the Product

- Click on Clipper LDP Postcard and click SELECT



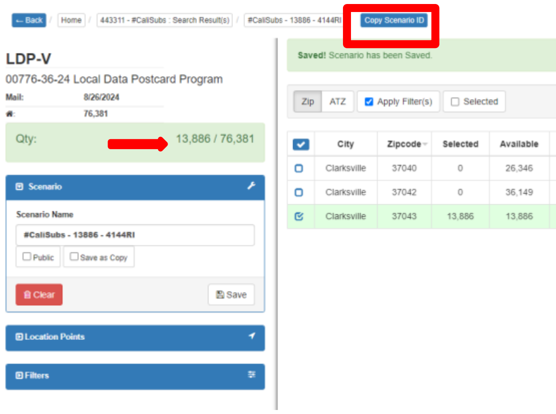
Step 5 - Configure Products

- From the list of products, choose CL-LDPV
- Notice the wrench icon next to the product you selected. Click on the wrench



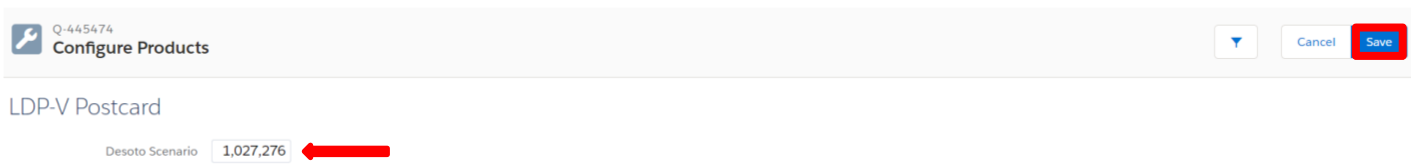
Step 6 - Mobile DeSoto

- Create your LDPV scenario in Mobile DeSoto. You no longer need to make the scenario public
- When you hit SAVE, a blue button will appear that reads: COPY SCENARIO ID
- Click on COPY SCENARIO ID and the ID number will be copied to the clipboard
- This is the number you will paste into Salesforce



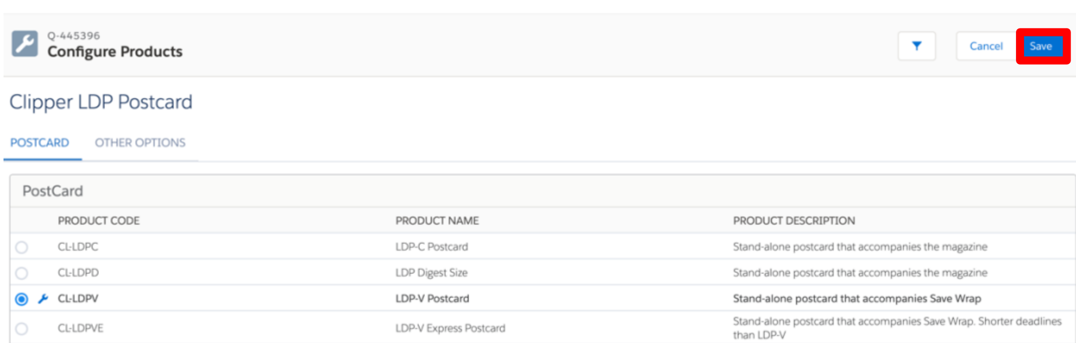
Step 7 - Mobile DeSoto Scenario ID

- Paste in the scenario number from Mobile Desoto and click SAVE
- For this test scenario use scenario number 1027276



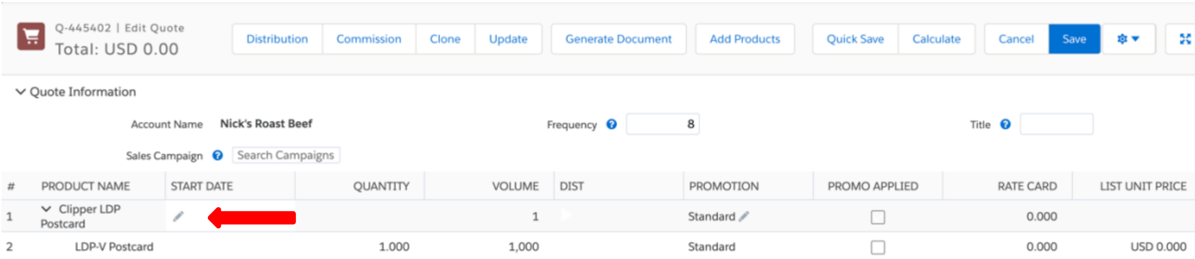
Step 8 - Reconfigure

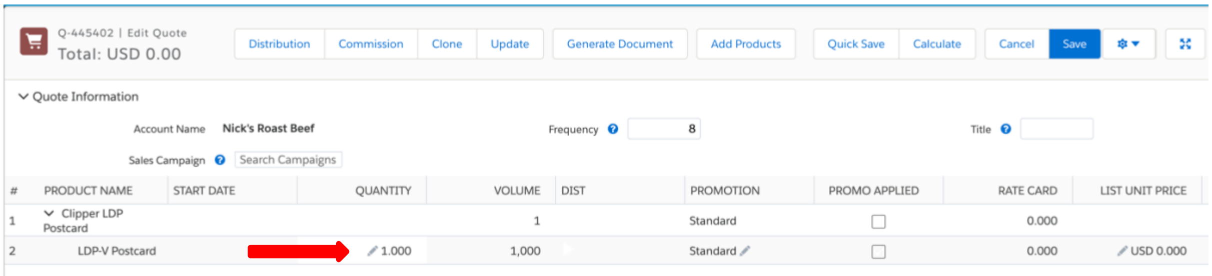
- Click SAVE



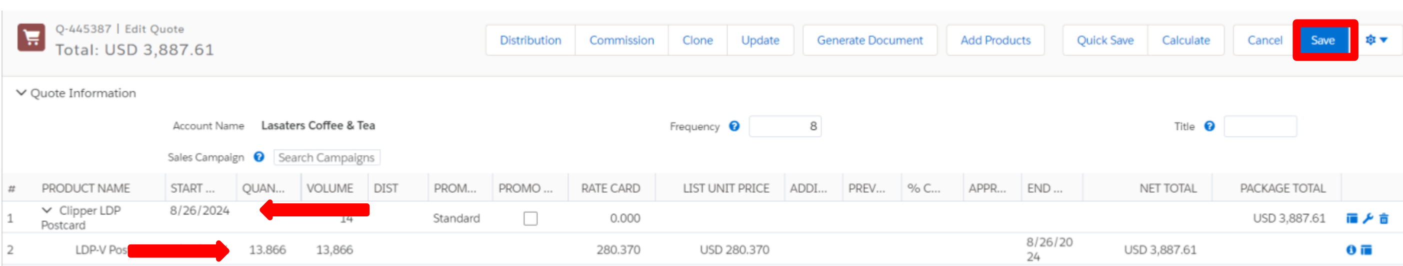
Step 9 - Date and Quantity

- FIRST, select the **Quick Save** button to save the selections you've made up to this point
- Now that your product has been chosen, hover over the DATE and QUANTITY to find the pencil (edit)





- FIRST, select the mail date from the DeSoto scenario. A calendar will pop up when you click on the pencil
- Second, type in the correct quantity from the DeSoto scenario. The date and quantity must match the data from the scenario
- Note when putting in the quantity the decimal point is the comma separation (13,866 home would be 13.866)
- Click SAVE



Step 10 - 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.

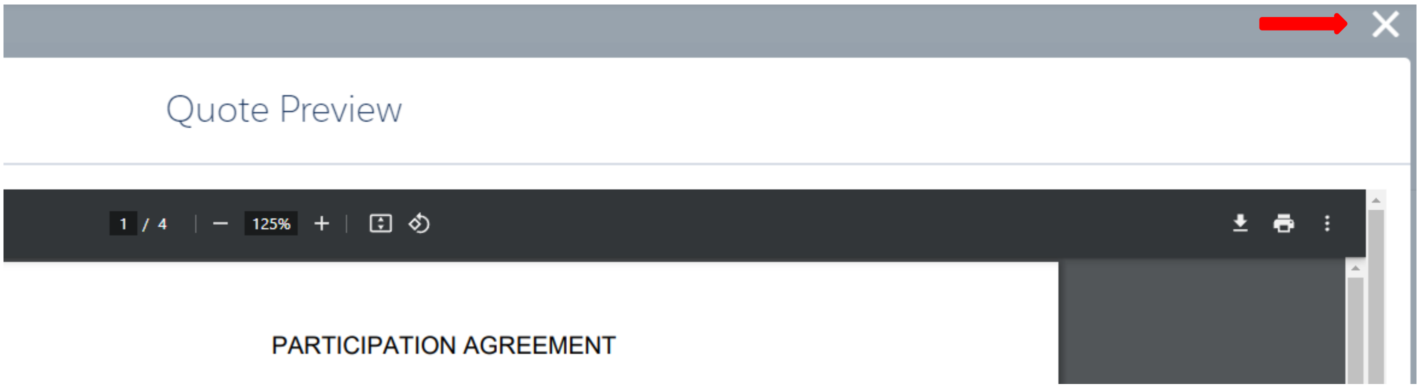
  At or Above Threshold Approved =  *Below Threshold Pending Manager Approval =* 

Step 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.

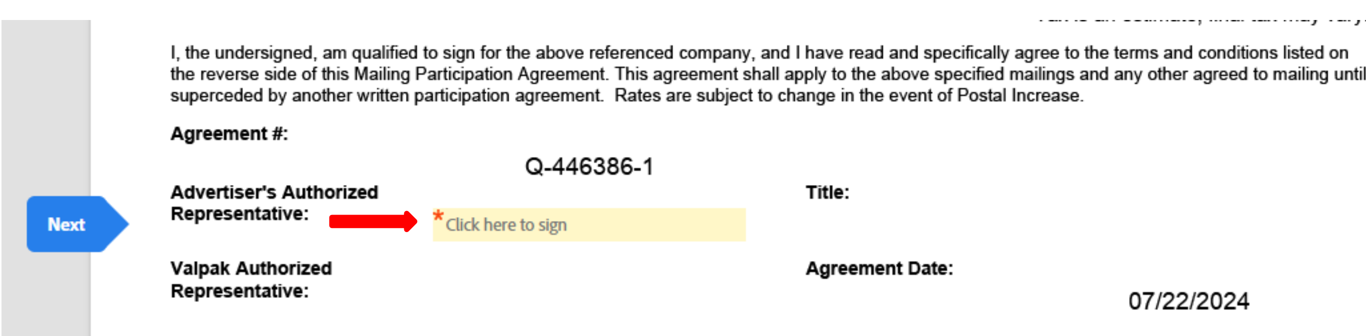
Step 12 - Advertiser E-sign

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.

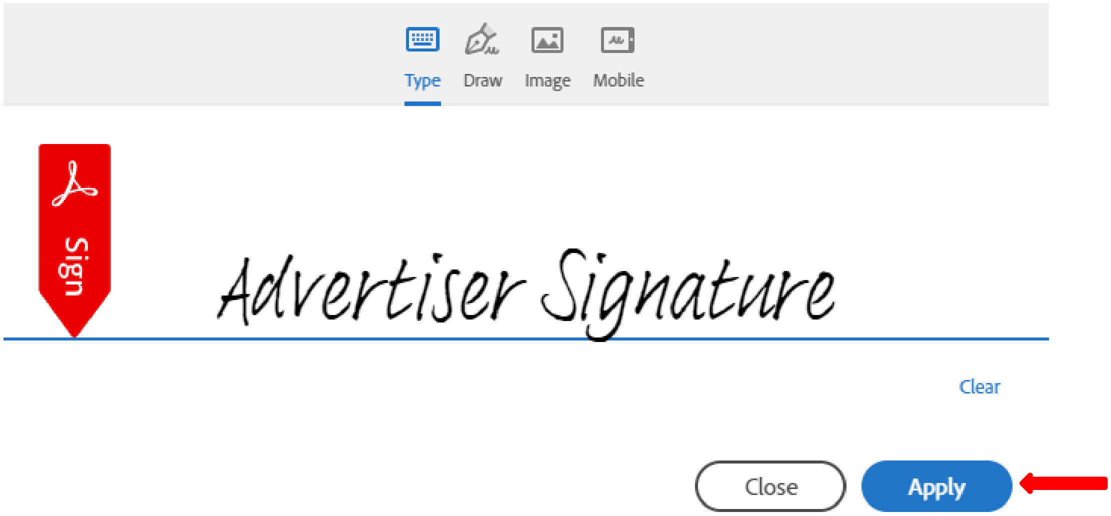
- Go to the inbox of the personal email address used for this related contact record and locate the email from your name via Ad. adobesign@adobesign.com (the subject line is “Signature requested on Q-111111-11111111-1111”).

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

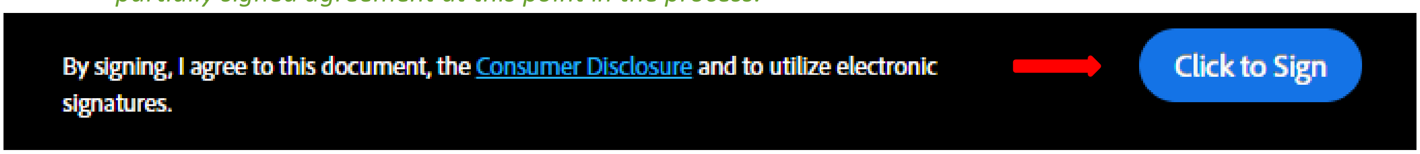


- Choose the **Type** option (options include: type, draw, image, mobile).
- E-sign on the signature line indicated by the Adobe Sign flag.
- Select the **Apply** button.



- 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 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.

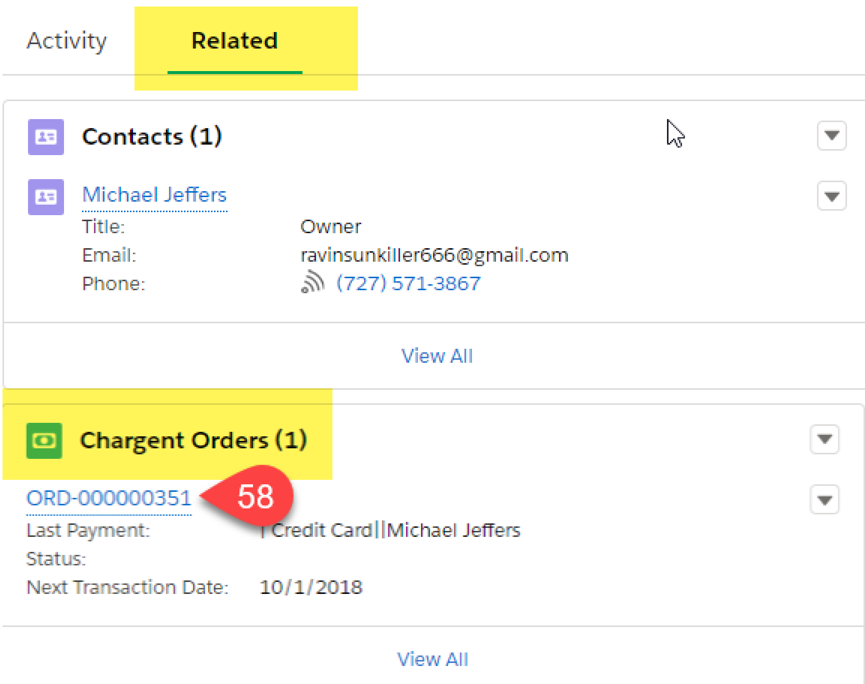
- Select the **Apply** button.

- 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.