

CPQ Exercise Guide – Legacy OPP

Create a Legacy OPP postcard for a Clipp local book (Same type scenario for LDP-C)

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

Create a quote and opportunity by choosing a product and related field: quote creation or Cancel to return to the account. Select the 'I will Choose a product without a product. Further modifications can be made at the next

Product

Select Product ⓘ

Clipper Off Page [CL-OFFPAGE]

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

Q-445360 **Edit Quote**

[Distribution](#)
[Commission](#)
[Clone](#)
[Update](#)
[Generate Document](#)
[Add Products](#)
[Quick Save](#)
[Calculate](#)
[Cancel](#)
[Save](#)

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 LDP Postcard and click SELECT

Q-445506 **Product Selection**

Search Products

40 [Select](#) [Select & Add More](#) [Cancel](#)

PRODUCT NAME	PRODUCT DESCRIPTION	PRODUCT CODE	PRODUCT FAMILY	LIST PRICE
<input type="checkbox"/> Clipper On Page	Magazine Pages that are Printed, Bound, and Mailed	CLONPAGE	Clipper Print	USD 0.00
<input type="checkbox"/> Single Panel Insert w/ Digital	Single Panel Insert w/ Digital	Wrapper_Bundle_Single_Panel_Dig	Valpak Print	USD 0.00
<input checked="" 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"/> Single Panel Insert 2-Sided	Coupon, Premium, 4/4, Coated	CP44	Valpak 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

Step 5 - Configure Products

- From the list of products, choose CL-JIP Jumbo Inside Postcard and click save

Q-445474 **Configure Products**

[Cancel](#) [Save](#)

Clipper Off Page

[CLIPP INSERTS](#)
[INTEGRATED INSERTS](#)
[SAVE INSERTS](#)
[CUSTOMER SUPPLIED INSERTS](#)
[OTHER OPTIONS](#)

PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION
<input type="radio"/> CL-EIP	Extended Inside Postcard	Postcard loosely inserted inside the magazine
<input checked="" type="radio"/> CL-JIP	Jumbo Inside Postcard	Postcard loosely inserted inside the magazine
<input type="radio"/> CL-CWC	Cover Wrap Card	Folded card that is staple bound to the outside of the magazine, wrapping the front and back covers.
<input type="radio"/> CL-EVEIP	Vertical Extended Inside Postcard	Postcard loosely inserted inside the magazine
<input type="radio"/> CL-CIBP	Center Insert 8 Panels	Glossy text stock Insert that is staple bound into center of magazine
<input type="radio"/> CL-LI2P	Custom Loose Insert 2 Pages	Glossy text stock Insert that is loosely inserted inside the magazine

Step 6 - Select Distribution

- Hit quick save and then select distribution
- Click the navigation star

Quote Information

Account Name: Kellys Big Burger Frequency: 8

Sales Campaign: Search Campaigns

#	PRODUCT NAME	START ...	QUANTL...	VOLUME	DIST	PROM...	PROMO ...	RATE CARD	LIST UNIT PRICE	ADDI...	PREV...	% C...	APPR...	END DATE	NET TOTAL	PACKA
1	Clipper Off Page	7/9/2024		6		Standard	<input type="checkbox"/>	0.000								
2	Jumbo Inside Postcard	7/9/2024	5,000	5,000				109.730	USD 109.730					7/9/2024	USD 548.65	
3	Local Flavor Online Coupon	7/9/2024	1					0.000	USD 0.000					7/9/2024	USD 0.00	

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 7 - Select Distribution

- Choose the market you are looking for
- Click on the sub NTA's (blocks of 5,000 homes) based on your mailing area and click save
- See Map sample below for sub NTA areas

PRODUCT	LOCAL QTY	OUTBOUND QTY	START DATE	EARLIEST MAIL DATE
Clipper Off Page	0 0 selected	5,000 0 selected	Jul 9, 2024	

+ Add Version Selected version: V1

Outbound - Jumbo Inside Postcard [CL-JIP]

Search For Market: buff

NY-Buffalo [4622]

Filter Job / NTA: Filter Job / NTA Mail From Date: Jul 9, 2024 Mail To Date: []

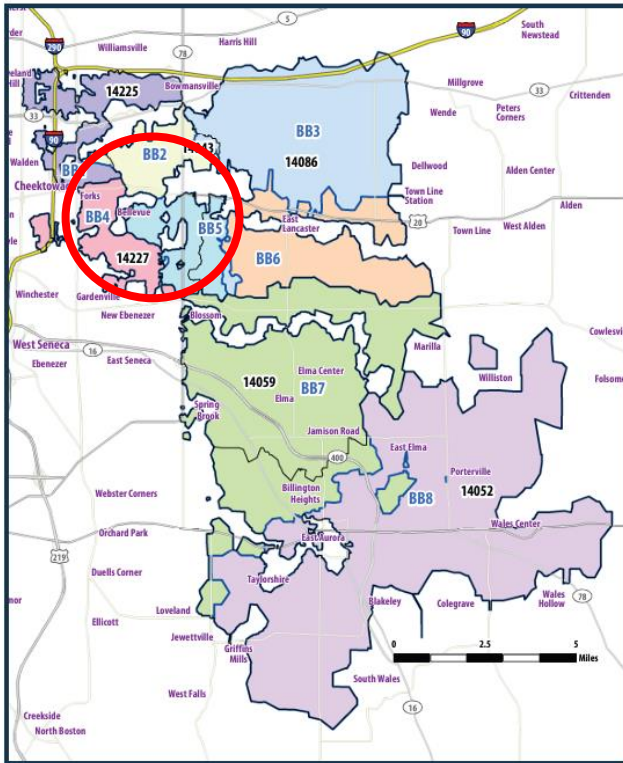
Select NTAs one Job at a time to an expanded Job

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

<input type="checkbox"/>	BA7 - Buffalo-Amherst	5,000	<input type="checkbox"/>	00189-Clipper
<input type="checkbox"/>	BA8 - Buffalo-Amherst	5,000	<input type="checkbox"/>	00189-Clipper
<input type="checkbox"/>	BB1 - Buffalo-Central	5,000	<input type="checkbox"/>	00369-Clipper
<input checked="" type="checkbox"/>	BB2 - Buffalo-Central	5,000	<input type="checkbox"/>	00369-Clipper
<input type="checkbox"/>	BB3 - Buffalo-Central	5,000	<input type="checkbox"/>	00369-Clipper
<input checked="" type="checkbox"/>	BB4 - Buffalo-Central	5,000	<input type="checkbox"/>	00369-Clipper
<input checked="" type="checkbox"/>	BB5 - Buffalo-Central	5,000	<input type="checkbox"/>	00369-Clipper
<input type="checkbox"/>	BB6 - Buffalo-Central	5,000	<input type="checkbox"/>	00369-Clipper



Buffalo-Central, NY 2024 Map & Schedule



advertise.clipp.com

844.395.8059

Step 8 –

- Review and Quick Save
- If it is ready to go then hit Save

Q-445474 | Edit Quote
Total: USD 1,645.95

[Distribution](#)
[Commission](#)
[Clone](#)
[Update](#)
[Generate Document](#)
[Add Products](#)
[Quick Save](#)
[Calculate](#)
[Cancel](#)
[Save](#)

Quote Information

Account Name: Kellys Big Burger Frequency: 8 Title:

Sales Campaign: Search Campaigns

#	PRODUCT NAME	START ...	QUANTL...	VOLUME	DIST	PROM...	PROMO ...	RATE CARD	LIST UNIT PRICE	ADDL...	PREV...	% C...	APPR...	END DATE	NET TOTAL	PACKAC
1	Clipper Off Page	8/12/2024		16		Standard	<input type="checkbox"/>	0.000								USD
2	Jumbo Inside Postcard	8/12/2024	15,000	15,000				109.730	USD 109.730					8/12/2024	USD 1,645.95	
3	Local Flavor Online Coupon	8/12/2024	1					0.000	USD 0.000					8/12/2024	USD 0.00	

Step 9 - 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.

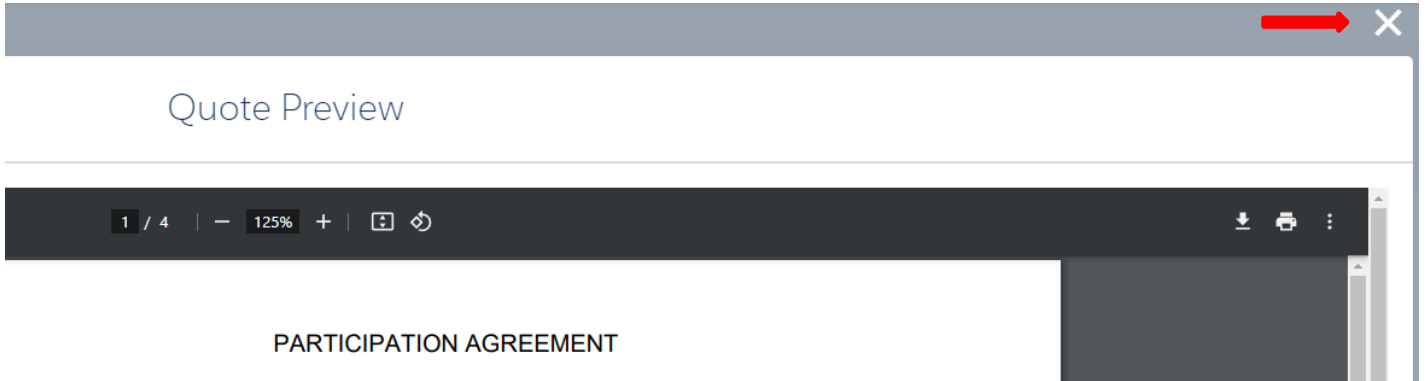
At or Above Threshold Approved = Below Threshold Pending Manager Approval =

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.

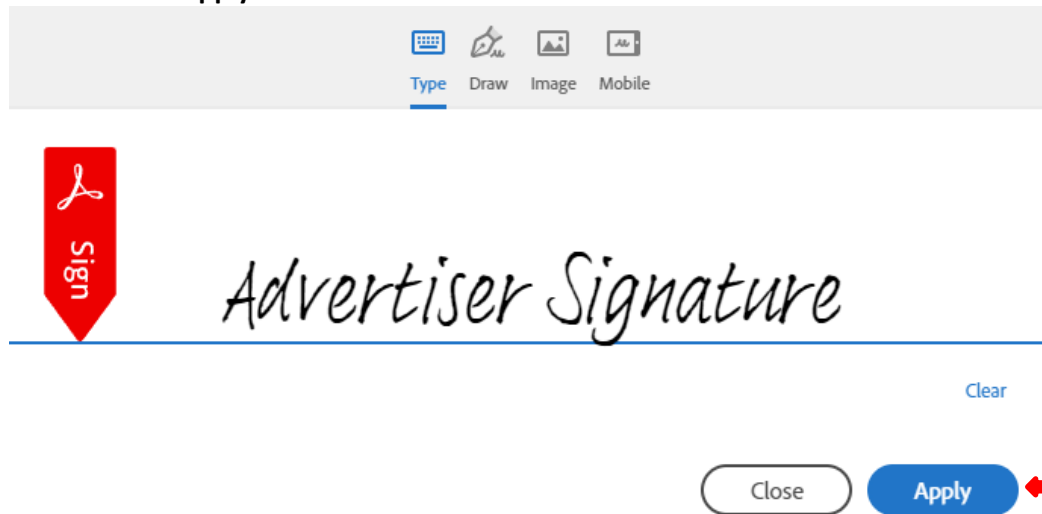
- Go to the inbox of the personal email address used for this related contact record and locate the email from your name via Ad. adobesign@adobesign.com (the subject line is "Signature requested on Q-111111-11111111-1111").

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.

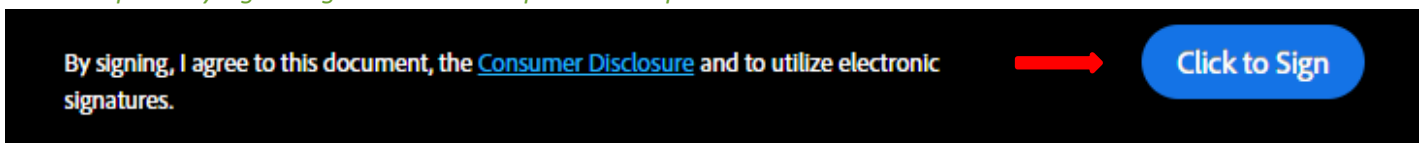


- Choose the **Type** option (options include: type, draw, image, mobile).
- E-sign on the signature line indicated by the Adobe Sign flag.
- Select the **Apply** button.



- 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.

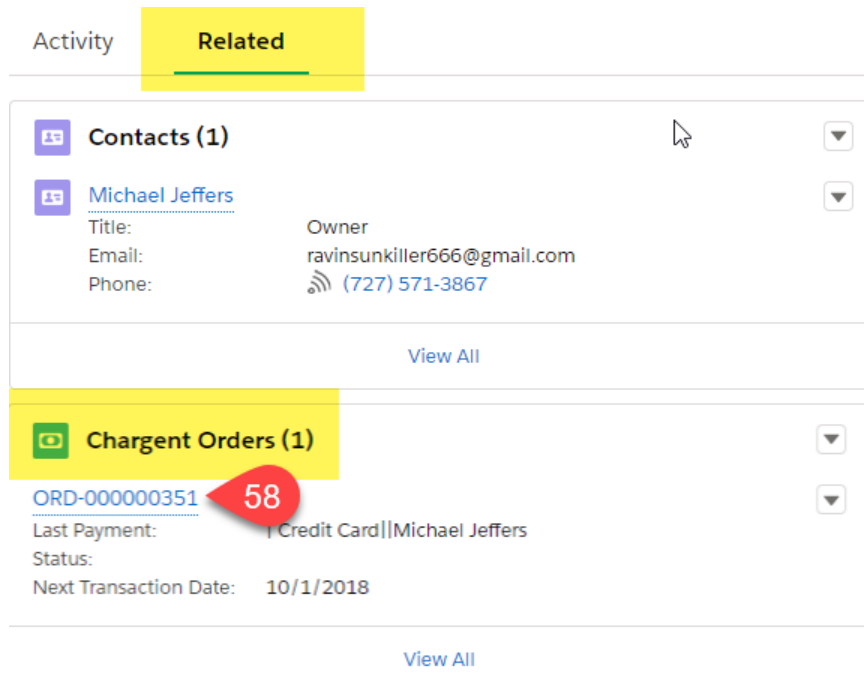
- Select the **Apply** button.

- 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-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.