

Ad Requests



Ad Copy for Bundles

Save Your Bundle(s)

- Once your bundles are completed, “Quick Save” and then “Save” your quote. Each bundle created will require ad copy. In this example, 2 ad copy requests will be auto-generated for you once the quote is approved.

Sandbox: SFTRAIN2 | [Log out](#)

valpak / *Clipper*

Q Search...

Franchise Sales Home Sales Lens Virtual Envelope Leads Contacts Accounts Tasks Quotes Opportunities VPO Orders Cases Dashboards Reports * More

Q-446156 | Edit Quote
Total: USD 3,634.01

Distribution Commission Clone Update Generate Document Add Products **1** Quick Save Calculate **2** Save

Quote Information

Account Name **Ad Request Instructions** Frequency Title

Sales Campaign

#	PRODUCT NAME	START DATE	QUANTITY	VOLUME	DIST	PROMOTION	PROMO APPLIED	RATE CARD	LIST UNIT PRICE	ADDITIONAL DISC.
1	Clipper On Page	9/30/2024		45		Standard	<input type="checkbox"/>	0.000		
2	Full Page	9/30/2024	45,425	45,425	✓			25.000	USD 25.000	
3	Local Flavor Online Coupon	9/30/2024	1					0.000	USD 0.000	
4	Clipper On Page	8/26/2024		45		Standard	<input type="checkbox"/>	0.000		
5	Front Cover	8/26/2024	45,425	45,425	✓			55.000	USD 55.000	
6	Local Flavor Online Coupon	8/26/2024	1					0.000	USD 0.000	

Submit for Approval

- Next, click on the “Submit for Approval” button.
- If your quote requires manager approval, you will have to wait to complete the ad request until approval is received.

The screenshot displays the Valpak Clipper software interface. At the top left is the Valpak Clipper logo. A search bar is located at the top right. Below the logo is a navigation menu with items: Franchise Sales, Home, Sales Lens, Virtual Envelope, Leads, Contacts, Accounts, Tasks, Quotes, Opportunities, and VPO Orders. The 'Quotes' menu item is selected. The main content area shows a quote titled 'Quote Q-446156'. To the right of the quote title are buttons for 'Edit', 'Delete', 'Edit Lines', 'Submit For Approval', and 'Generate Document'. The 'Submit For Approval' button is highlighted with a red rectangle and a green hand cursor. Below the buttons, there are fields for 'Account' (Ad Request Instructions), 'Opportunity' (Ad Request Instructions 00494728), 'Primary Contact' (Jennifer Tester), and 'Primary Contact Email' (testing@cmag.com.example). To the right of these fields are 'Approval status' and 'Draft' labels. Below the quote details is a horizontal bar with icons and labels for 'Quote Lines (6)', 'Quote Documents (0)', 'Agreements (0)', 'Approvals (0)', 'Quote History (3)', and 'Launch Campaigns (0)'. At the bottom, there is a navigation bar with tabs for 'Details', 'Staff', 'Commission', 'Distribution', and 'Related Quotes'. On the far right, there is a sidebar with a 'Dis' icon, a 'PRODUCT' label, and a dropdown menu showing 'CL-ONPAG'.

Ad Request Case

- Once the quote is approved, the system will auto-generated the Ad Request case for you. Scroll to the bottom of the quote to complete the request.
- Select the case number for the ad copy you want to complete. For this example, 2 cases have been created. One for the half page and one for the full page.

Quote
Q-446156

Ad/Data Request Assignm... Account Ad Requests Account Data Requests Locations

Ad/Data Requests Assignment(2)

Search Phrase

	<input type="checkbox"/> N..	Effective ...	Product Display	Ad Reques...	Case ...	Data Requ...	Data ...
1	<input type="checkbox"/>	2 09/30/2024	-Full Page [CL-FP]	00414590	00414590		
2	<input type="checkbox"/>	5 08/26/2024	-Front Cover [CL-FCOVER]	00414591	00414591		

Ad Request Case

From the master request, click on the related case number or subject link.

The screenshot displays a case management interface for a master ad request case. The case title is "Ads Parent-Full Page [CL-FP]". Below the title, there are navigation links for "Related Cases (1)", "Case Comments (0)", "Case History (1)", and "Cases (0)". A red note states: "Note: This is master ad request case. It will not go to artists. Case comments and status changes made to master ad request will be copied to all open related (versioned) cases." The interface is divided into two main sections: "Details" on the left and "Case Comments (0)" on the right. The "Details" section shows the status as "Working" and other fields like "Graphic Option", "VPO Graphic Status", and "VPO Reference Ad". The "Case Comments (0)" section contains a "Related Cases (1)" list. This list has one item with case number "00414592" and subject "Ad-Full Page [CL-FP]-V1-Standard". A red box highlights the subject link, and a mouse cursor is pointing at it. A tooltip shows the full subject name "Ad-Full Page [CL-FP]-V1-Standard" and a "view All" link. The status of the related case is "Pending Rep Action".

Case
Ads Parent-Full Page [CL-FP] [+ Follow](#)

[Related Cases \(1\)](#) [Case Comments \(0\)](#) [Case History \(1\)](#) [Cases \(0\)](#)

Note: This is master ad request case. It will not go to artists. Case comments and status changes made to master ad request will be copied to all open related (versioned) cases.

Details

▼ Status

Status
Working

Graphic Option ⓘ

VPO Graphic Status ⓘ

VPO Reference Ad ⓘ

Case Comments (0)

Related Cases (1)
1 item • Sorted by Case • Updated a few seconds ago

<input type="checkbox"/>	Case ↑	Subject	Details	Status	Graphic O...
1	00414592	Ad-Full Page [CL-FP]-V1-Standard		Pending Rep Action	

Ad-Full Page [CL-FP]-V1-Standard
[view All](#)

Step 1

Change the Status

valpak / Clipper

Search...

Franchise Sales Home Sales Lens Virtual Envelope Leads Contacts Accounts Tasks Quotes Opportunities

Case
Ad-Full Page [CL-FP]-V1-Standard

Case Number	Record Type	Account Name	Status
00414592	AD Request	Ad Request Instructions	Pending Rep Action

[Case Comments \(0\)](#) [Files \(0\)](#) [Case History \(1\)](#) [Cases \(0\)](#) [Distribution Versions \(1\)](#)

Details

Case

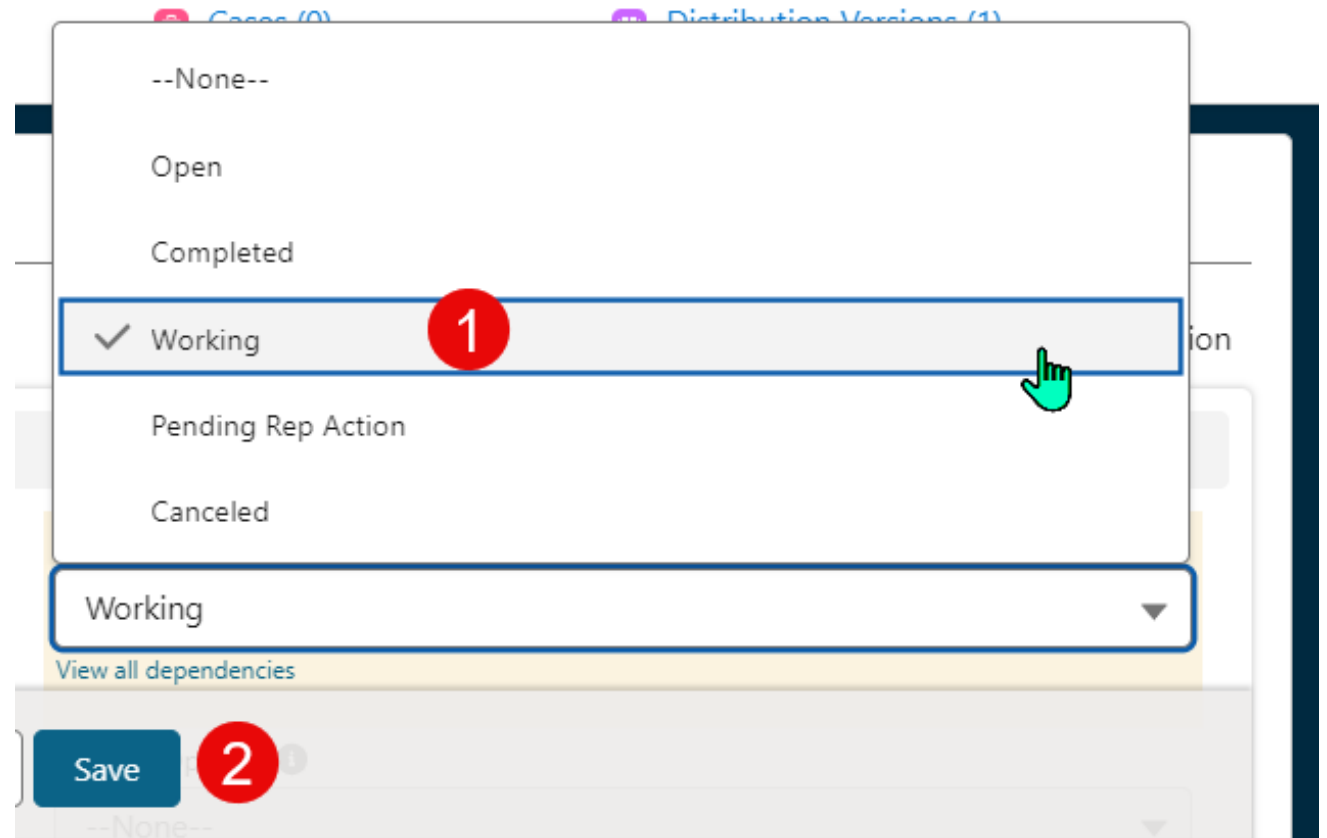
Case Owner Jennifer Geib	Status Pending Rep Action
Case Number 00414592	Graphic Option ⓘ

Edi

- **FIRST** – Change the status of the case by selecting the pencil icon.
- You must do this step first so the request will flow properly through the various systems.

Step 1 continued

- Change the status to “Working”
- Click “Save”



Step 2

Ad copy instructions

- Scroll down to the “Details” field.
- Select the pencil to open the text box.
- Enter all of your ad copy instructions including:
 - Offers
 - Business information
 - Body copy
 - Design instructions
- Save your changes

The screenshot displays the Valpak Clipper interface for a case titled "Ad-Full Page [CL-FP]-V1-Standard". The page includes a navigation bar with options like "Franchise Sales", "Home", "Sales Lens", "Virtual Envelope", "Leads", "Contacts", "Accounts", "Tasks", "Quotes", and "Opportunities". Below the navigation, there is a search bar and a "Case" header. The main content area shows a "Details" section with a text editor. The text editor has a toolbar with options for font (Salesforce Sans), size (12), color, bold, italic, underline, link, and unlink. The text area contains the placeholder text "Enter ad copy instructions here.", which is highlighted with a red rectangular box.

Step 2 continued

Referencing an ATOL Ad

If you want to reference an ad that was previously in ATOL, you will need to add the following information to your details:

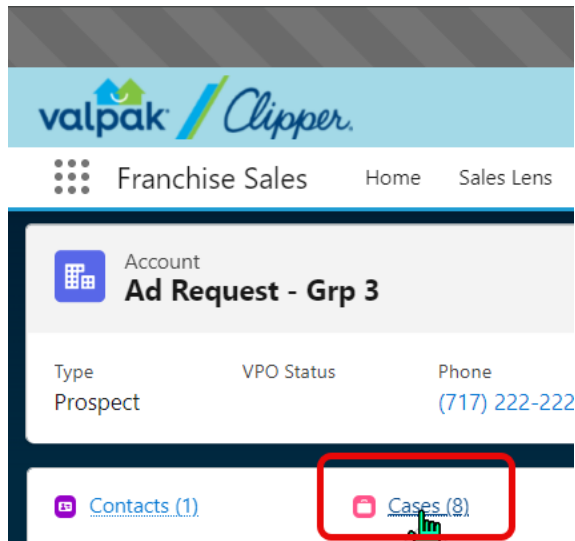
- ESP Account Number
- ESP Account Name
- Book Number & Issue Code

Step 2 continued

Referencing a SF Ad

If you want to reference an ad that was created in SF, you will need to add the Clipper Reference Ad number.

- From the account or quote, select "Cases" from the quick links.



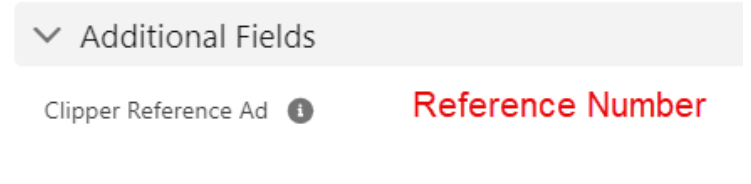
- Open the case that you want to reference.

The screenshot shows a list of cases under the heading 'Accounts > Ad Request - Grp 3 Cases'. The list contains 8 items, sorted by Date Opened. The table has two columns: 'Case' and 'Subject'. A green mouse cursor is pointing at the 'Case' link '00414699' in the fifth row.

	Case	Subject
1	00414749	Critical Change needed for Approved Ad
2	00414708	Ad-Full Page [CL-FP]-Grand Opening - Washington-S
3	00414709	Ad-Full Page [CL-FP]-South Hills & others-Standard
4	00414707	Ads Parent-Full Page [CL-FP]
5	00414699	Ad-Full Page [CL-FP]-V1-Standard
6	00414700	Ad-Fron Ad-Full Page [CL-FP]-V1-Standard

- Scroll down to the Clipper Reference Ad field.

This is the number that you will need to provide in your details.



Step 3

Adding files

If you have graphics to use in the ad:

- Supplied ads
- Pictures
- Logos

You will need to upload those in the “Files” box.

The screenshot displays the Valpak Clipper software interface. At the top, there is a search bar and navigation icons. Below the navigation bar, the main header shows the case name "Ad-Full Page [CL-FP]-V1-Standard" and buttons for "Follow", "Edit", and "Sharing". The interface is divided into two main sections: "Details" on the left and "Related" on the right. The "Details" section contains a table of case information:

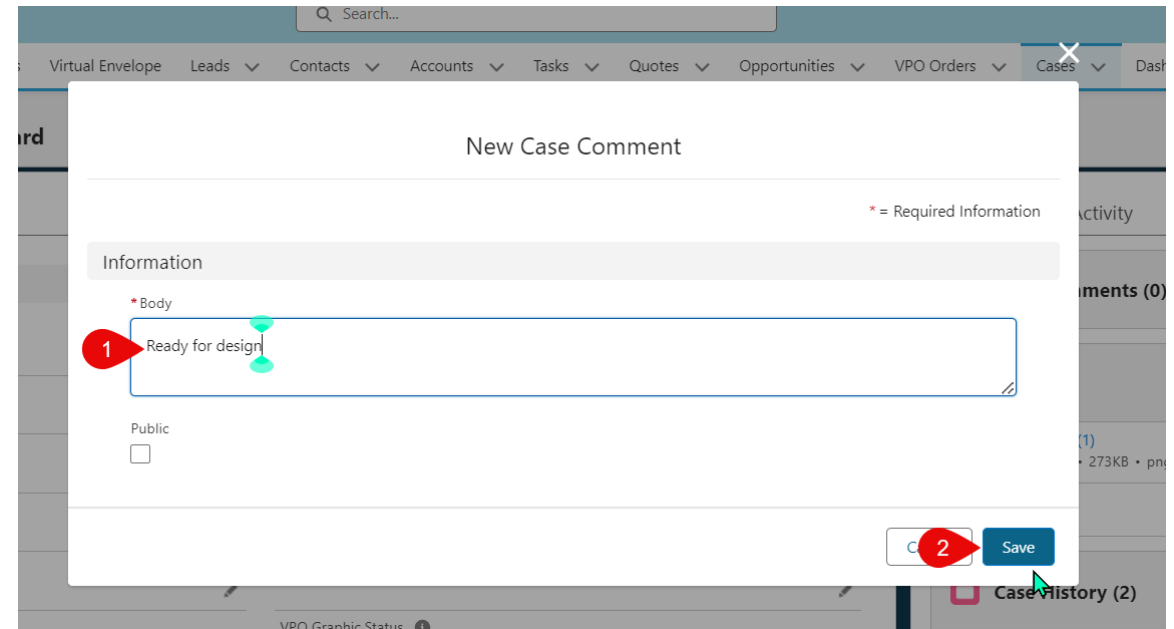
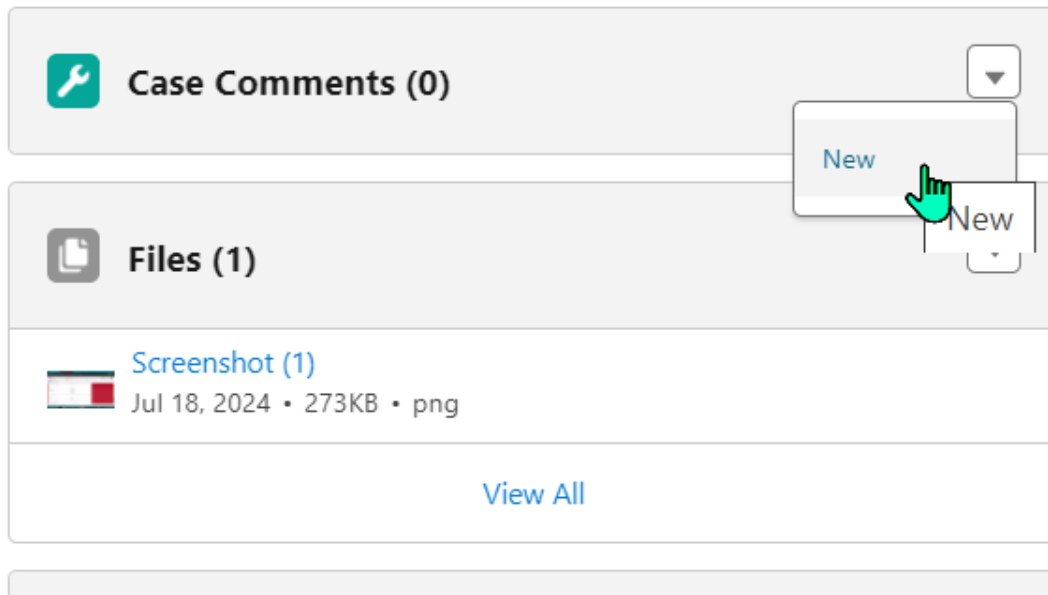
Case	
Case Owner	Status
Jennifer Geib	Working
Case Number	Graphic Option
00414592	
Parent Case	Case Record Type
00414590	AD Request
Franchise Name	Material Codes
Valpak of Kings County	CL-FP

The "Related" section on the right has two tabs: "Related" and "Activity". Under the "Related" tab, there are two sections: "Case Comments (0)" and "Files (0)". The "Files (0)" section is highlighted with a red box and contains an "Upload Files" button with an upward arrow icon and the text "Or drop files" below it.

Step 4

Send to design team

- Once it is ready for the design team, select the dropdown arrow beside Case Comments and select “New”
- Enter a comment for the design team and save your comment so they can begin working on the ad.



Dashboard

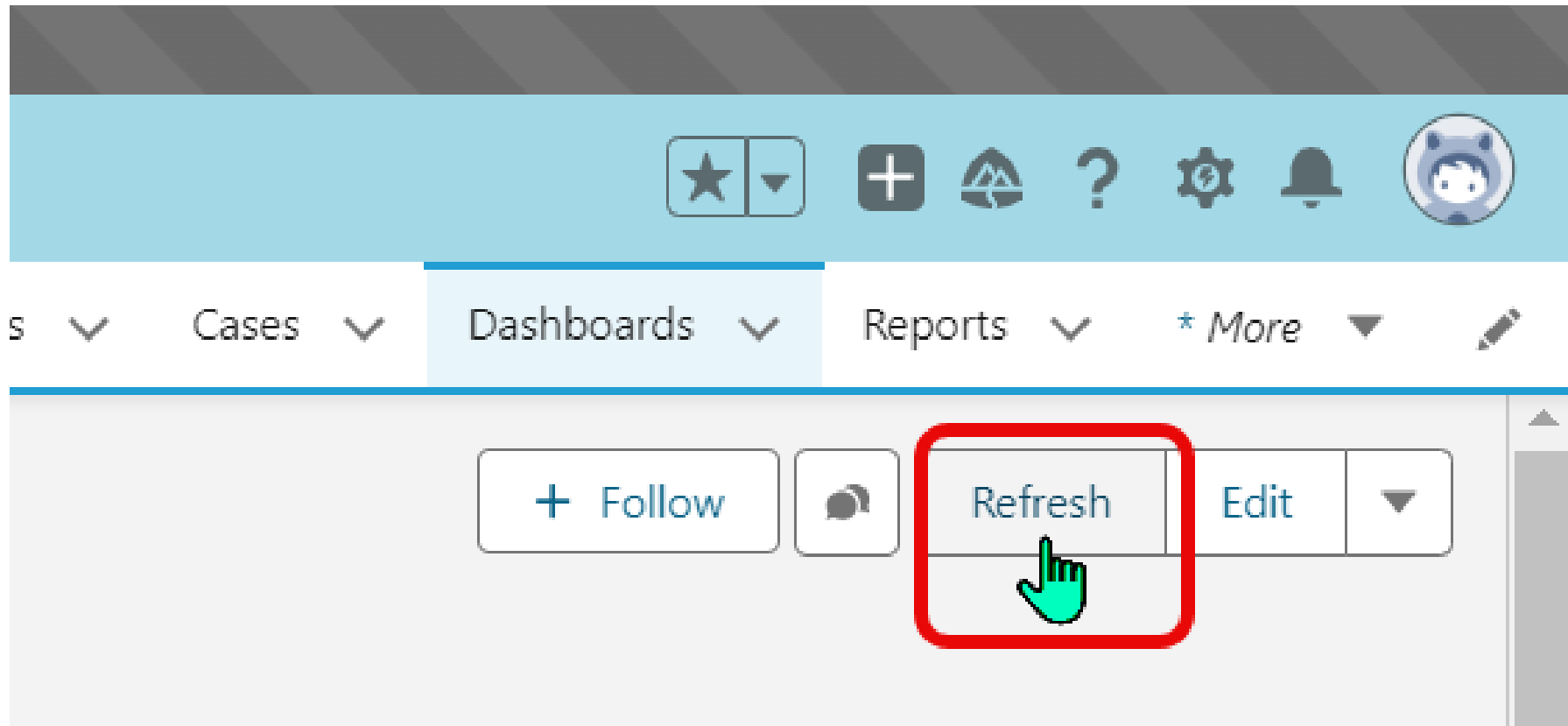
To see the status of your ad requests, on your home screen select the Franchise Support Cases: Reps dashboard

The screenshot displays the Salesforce dashboard for a Sales Owner/Manager. The top navigation bar includes the Valpak Clipper logo, a search bar, and various utility icons. The main dashboard area is divided into several sections:

- Dashboard Header:** "Sales Owner/Manager Home Dashboard" with a refresh button and a note: "Last refreshed 26 days ago. Refresh this dashboard to see the latest data." The user is identified as Jennifer Geib Change, viewing as of Jun 21, 2024 9:22 AM.
- Key Metrics:** Four cards showing pending actions:
 - Quotes in Manager Review: 1 Pending Manager Action
 - Quotes in Client Review: 0 Pending Client Action
 - Quotes Waiting for Count...: 0 Pending Rep Action
 - Activities Created Today: 0 Tasks + Events - Leads & Prospects
- Key Links:** A row of six icons representing different dashboard sections.
- Right Sidebar:** A list of dashboard links, with "Franchise Support Cases: Reps" highlighted by a red box and a mouse cursor pointing to its "View Dashboard" link.

The bottom of the page features a footer with various help and support links, including "Help and Support", "Daily Dashboards & Reports", "Daily List Views", "CPQ Help Links", "Payment Help Links", "Salesforce Help Links", "Sales Tools", "Recent Enhancements", and "To Do List".

Always make sure to “Refresh” so that you get the most up-to-date information



My Cases – Pending Reply

- This section will include things that are waiting on some kind of action from you including:
 - Ad copy instructions
 - Proofs and reproofs
 - Questions from the design team
- You can access the request by clicking on the corresponding link

Work: My Cases Pending Reply

Case ...	Case ...	Account Name	Case Rec...	Type	Subject	Case Last Modified ...
00414577	Jennifer Geib	breaking the system	AD Request	Artwork - Ad Re	Ad-Full Page [CL-FR]-V1-Standard	7/17/2024
00414581	Jennifer Geib	Ad Request Instructions	AD Request	Artwork - Ad Re	Ad-Front Cover [CL-FCOVER]-V1-Standard	7/17/2024
00414585	Jennifer Geib	Ad Request Instructions	AD Request	Artwork - Ad Re	Ad-Front Cover [CL-FCOVER]-V1-Standard	7/17/2024
00414589	Jennifer Geib	Ad Request Instructions	AD Request	Artwork - Ad Re	Ad-Front Cover [CL-FCOVER]-V1-Standard	7/18/2024
00414593	Jennifer Geib	Ad Request Instructions	AD Request	Artwork - Ad Re	Ad-Front Cover [CL-FCOVER]-V1-Standard	7/18/2024

[View Report \(My Pending Support Cases\)](#)

My Cases – In Progress

This section will show items that are currently with the graphics team or other support department.

Info: My Cases in Progress

Case Nu...	Case ...	Account Name	Case Reco...	Type	Subject	Age
00414580	Jennife r Geib	Ad Request Instructions	AD Request	Artwork - Ad Re	Ad-Full Page [CL-FP]-V1-Standard	0
00414584	Jennife r Geib	Ad Request Instructions	AD Request	Artwork - Ad Re	Ad-Full Page [CL-FP]-V1-Standard	0
00414588	Jennife r Geib	Ad Request Instructions	AD Request	Artwork - Ad Re	Ad-Full Page [CL-FP]-V1-Standard	0
00414592	Jennife r Geib	Ad Request Instructions	AD Request	Artwork - Ad Re	Ad-Full Page [CL-FP]-V1-Standard	0

[View Report \(My Working Support Cases\)](#)

My Cases – Closed in Last 30 Days

This section will include all of your cases that were closed in the last 30 days including your approved ad requests.

Info: My Cases Closed in Last 30 Days

Case Nu...	Case ...	Account Name	Case Reco...	Type	Subject	Close
00414045	Jennife r Geib	Ad Request Princess	AD Request	Artwork - Ad Rei	Ad-Full Page [CL-FP]-V1-Standard	7/11/
00414089	Jennife r Geib	BKS - Breaking the System	AD Request	Artwork - Ad Rei	Ad-Full Page [CL-FP]-V1-Standard	7/12/
00414091	Jennife r Geib	BKS - Breaking the System	AD Request	Artwork - Ad Rei	Ad-Full Page [CL-FP]-V1-Standard	7/12/
00414477	Jennife r Geib	Testing LDP-V	AD Request	Artwork - Ad Rei	Ad-LDP-V Postcard [CL-LDPV]-Standard	7/17/


[View Report \(My Closed 30 Day Support Cases\)](#)



**Proofing
your Ad**

Graphics Link

- Access the Ad Request Case (either by clicking on the link in the dashboard or from the quote), scroll down until you see the Graphic Links field
- There will be a link from the graphics team.
- You will need to email this link to your client or send them screenshots of the ad.

▼ Advertiser Account & Product Info

External Graphic ID 

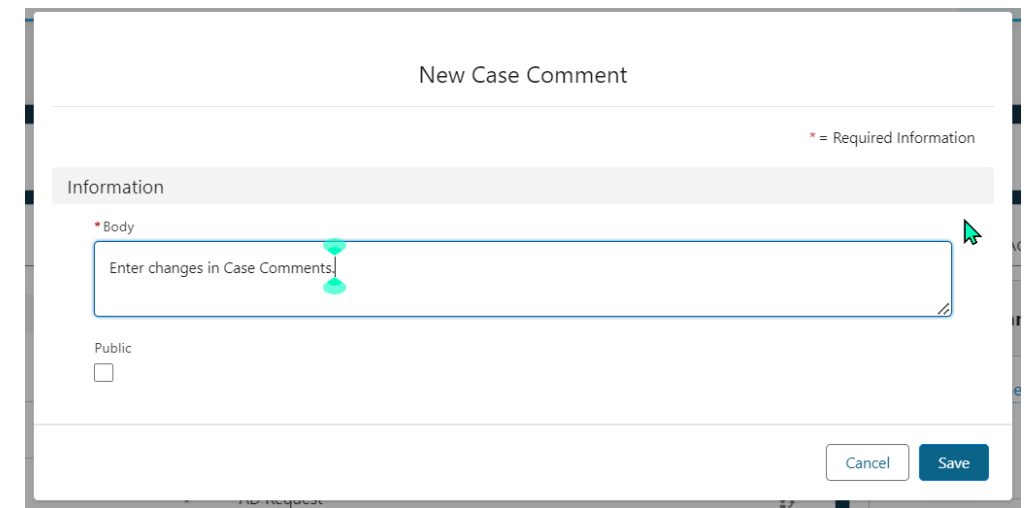
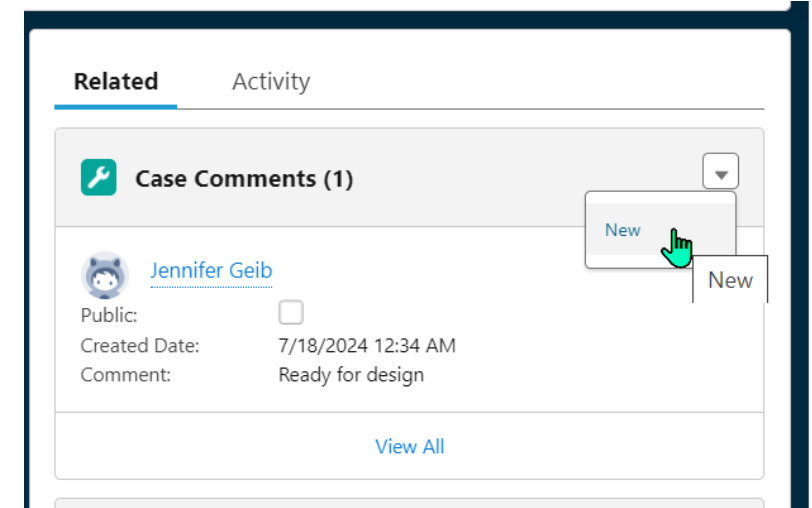
Graphic Links  **Grapics link will appear here** 

Changes & Reproofs

Documenting Changes

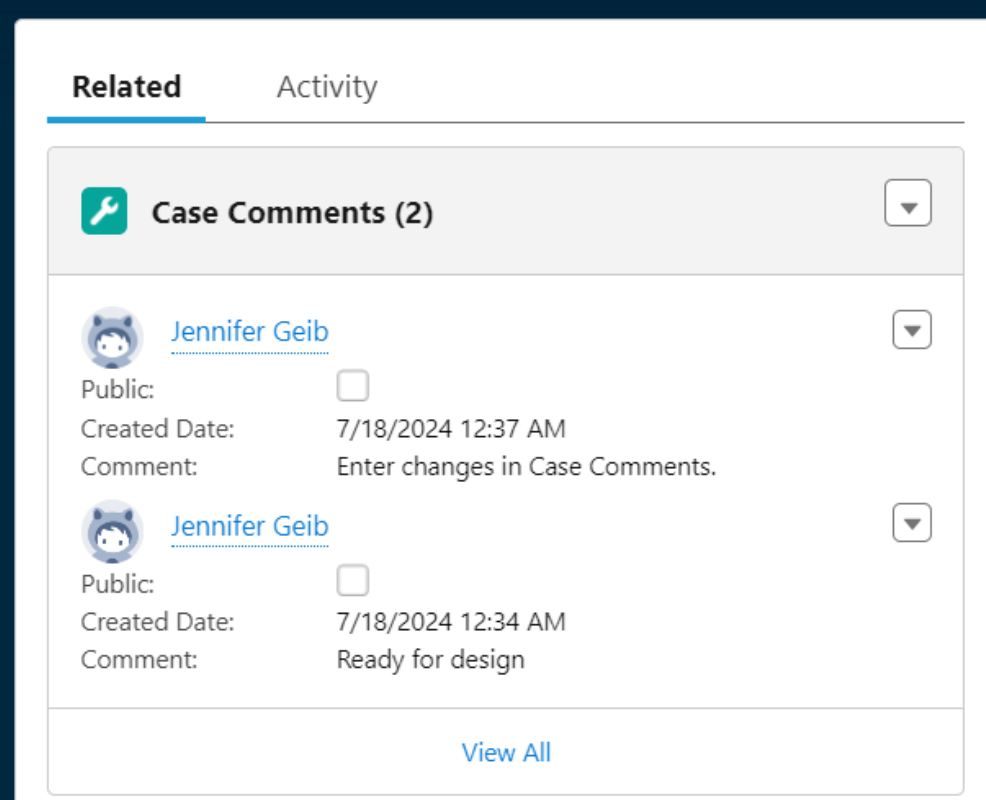
You will communicate any changes received from the client via the Case Comments.

This will automatically change the status back to Working and will be submitted to the graphics team.





Communication History



In the case comments you will be able to view the timeline of all of your communications with the design team.



The screenshot displays a user interface for viewing communication history. At the top, there are two tabs: "Related" (which is active and underlined) and "Activity". Below the tabs, there is a section titled "Case Comments (2)" with a green wrench icon and a dropdown arrow. This section contains two entries, each with a user profile icon and name "Jennifer Geib" and a dropdown arrow. The first entry shows a "Public" checkbox, a "Created Date" of "7/18/2024 12:37 AM", and a "Comment" of "Enter changes in Case Comments." The second entry shows a "Public" checkbox, a "Created Date" of "7/18/2024 12:34 AM", and a "Comment" of "Ready for design". At the bottom of the list, there is a "View All" link.

Related Activity



 **Case Comments (2)** 

 [Jennifer Geib](#) 

Public:

Created Date: 7/18/2024 12:37 AM

Comment: Enter changes in Case Comments.

 [Jennifer Geib](#) 

Public:

Created Date: 7/18/2024 12:34 AM

Comment: Ready for design

[View All](#)

Reproofs

- Once your changes are completed by the design team, the status of the case will change back to Pending Rep Action and will show in your dashboard under My Cases Pending Reply.
- You can click on the link to quickly access the case.

Work: My Cases Pending Reply

Case ...	Case ...	Account Name	Case Rec...	Type	Subject	Case Last Modified ...
004145 77	Jennife r Geib	breaking the system	AD Request	Artwork - Ad Re	Ad-Full Page [CL-FR]-V1-Standard	7/17/2024
004145 81	Jennife r Geib	Ad Request Instructions	AD Request	Artwork - Ad Re	Ad-Front Cover [CL-FCOVER]-V1- Standard	7/17/2024
004145 85	Jennife r Geib	Ad Request Instructions	AD Request	Artwork - Ad Re	Ad-Front Cover [CL-FCOVER]-V1- Standard	7/17/2024
004145 89	Jennife r Geib	Ad Request Instructions	AD Request	Artwork - Ad Re	Ad-Front Cover [CL-FCOVER]-V1- Standard	7/18/2024
004145 93	Jennife r Geib	Ad Request Instructions	AD Request	Artwork - Ad Re	Ad-Front Cover [CL-FCOVER]-V1- Standard	7/18/2024

[View Report \(My Pending Support Cases\)](#)

Reproofs

An updated link will appear in the Graphics Links field that can be viewed and sent to your client.

▼ Advertiser Account & Product Info

External Graphic ID



Graphic Links ⓘ

Grapics link will appear here



Approvals

Step 1

Changing Status

To approve the ad, change the status to “Completed”.

Details

Case

Case Owner Jennifer Geib	Status Pending Rep Action
Case Number 00414592	Graphic Option ⓘ
Parent Case 00414590	Case Record Type AD Request

Dropdown menu for Status:

- None--
- Open
- Completed**
- Working
- ✓ Pending Rep Action
- Canceled

Selected: Pending Rep Action

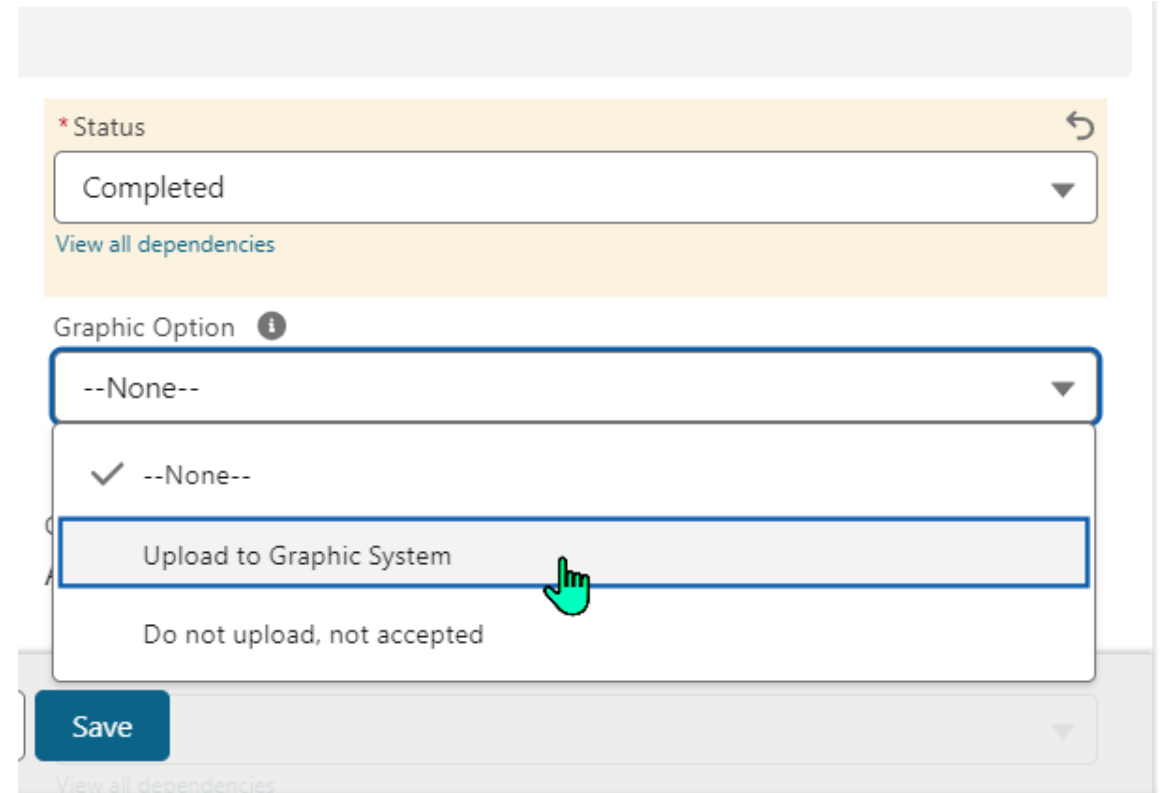
Graphic Option ⓘ

--None--

Step 2

Send to Print

- To complete the process, In the Graphics Options field select “Upload to Graphics System”.
- Save your changes.



* Status ↶


Completed ▾

[View all dependencies](#)

Graphic Option i

--None-- ▾

✓ --None--

Upload to Graphic System 

Do not upload, not accepted

Save ▾

[View all dependencies](#)

Dashboard

Once the ad is approved, the ad request will show up in the My Cases Closed in Last 30 Days section of the Franchise Support Cases: Reps dashboard.

Info: My Cases Closed in Last 30 Days

Case Nu...	Case ...	Account Name	Case Reco...	Type	Subject	Close
00414045	Jennife r Geib	Ad Request Princess	AD Request	Artwork - Ad Re	Ad-Full Page [CL-FP]-V1-Standard	7/11/
00414089	Jennife r Geib	BKS - Breaking the System	AD Request	Artwork - Ad Re	Ad-Full Page [CL-FP]-V1-Standard	7/12/
00414091	Jennife r Geib	BKS - Breaking the System	AD Request	Artwork - Ad Re	Ad-Full Page [CL-FP]-V1-Standard	7/12/
00414477	Jennife r Geib	Testing LDP-V	AD Request	Artwork - Ad Re	Ad-LDP-V Postcard [CL-LDPV]-Standard	7/17/

[View Report \(My Closed 30 Day Support Cases\)](#)

Changes

AFTER

Ad is Approved

You will not be able to submit changes to the design team through the case comments after the ad request has been marked as completed.

You will need to submit a support case using the following instructions.

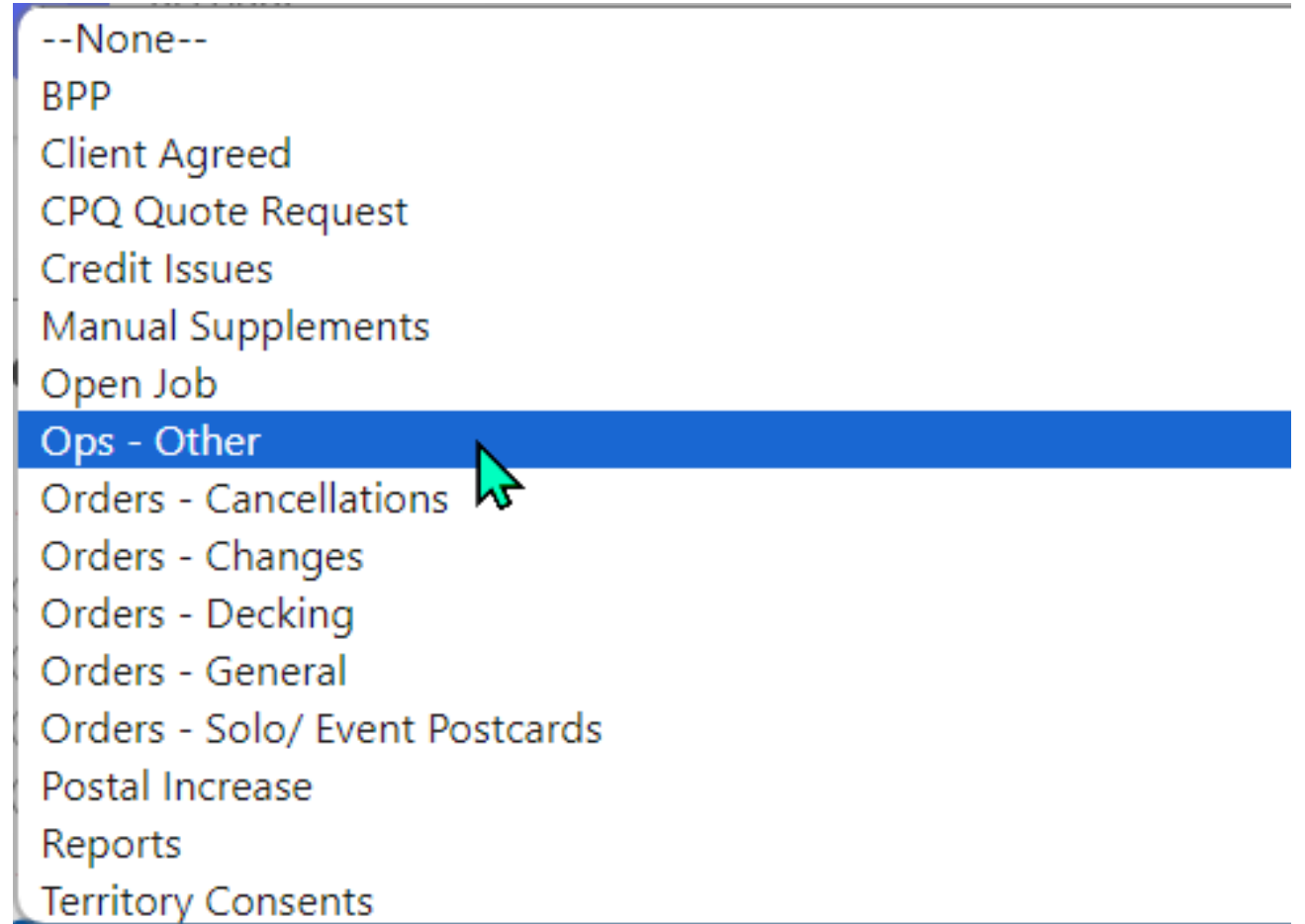
Step 1

- Go to the business account record.
- Select the Support tab.
- Select Operations from the category options.

The screenshot shows the Valpak Clipper interface. At the top, there is a search bar and a navigation menu with items: Franchise Sales, Home, Sales Lens, Virtual Envelope, Leads, Contacts, and Account. The main header displays 'Account Ad Request - Grp 3'. Below this is a table with columns: Type (Prospect), VPO Status, Phone ((717) 222-2222), Category (General Services [4]), and Account Ext ID. A summary row shows: Contacts (1), Cases (7), Opportunities (2), and Quotes (2). Another row shows: Chargent Payment Requ..., Payment Consents (0), VPO Orders (Print Accou..., and VPO Orders (Di. A message states: 'We found no potential duplicates of this Account.' Below this is a tabbed interface with tabs: Details, Support (1), Billing Dates, Statement, AR, Sales, and Locatic. The 'Support' tab is active. Under the 'Quick Case Create' section, there is a '* Category' label and two radio button options: 'Operations' (2) and 'Billing'.

Step 2

Select “Ops – Other” from the dropdown list.




Step 3

Add a subject line and then select “Next”.

Territory Consents: Request permission to pursue a client located in another franchise's territory

Product

*Subject

Case Opened On Behalf Of 

Next

Step 4

- Enter your changes and supply the Ad Request case # for the ad that needs to be changed.
- Select “Next” to continue.

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

Quick Case Create

Compose text

Salesforce Sans 12 B I U

Change phone number to 717-222-2222 for ad request [00414699](#)

Warning! Details will clear if navigate to previous screen. Save copy of text outside of case create before clicking Previous button to avoid losing work.

Previous **Next**

- You can find the Ad Request case number by hovering over or selecting “Cases” from the quick links.
- Copy the number and paste it into the instructions.

The screenshot shows the Valpak Clipper web application interface. At the top, there is a navigation bar with the Valpak Clipper logo and a search bar. Below the navigation bar, there are several menu items: Franchise Sales, Home, Sales Lens, Virtual Envelope, Leads, Contacts, and Accounts. The main content area displays the account name "Ad Request - Grp 3" and a list of quick links: Contacts (1), Cases (7), Opportunities (2), and Quotes (2). The "Cases" link is highlighted with a red circle and the number 1. Below the quick links, there is a section titled "Cases" with a sub-header "7 items • Sorted by Date Opened • Updated a few seconds ago". This section contains a table with the following data:

	Case	Subject	Date Opened ↓
1	00414708	Ad-Full Page [CL-FP]-Grand Opening - Washington-Standard	7/18/2024 4:23 PM
2	00414709	Ad-Full Page [CL-FP]-South Hills & others-Standard	7/18/2024 4:23 PM
3	00414707	Ads Parent-Full Page [CL-FP]	7/18/2024 4:23 PM
4	00414699	Ad-Full Page [CL-FP]-V1-Standard	7/18/2024 3:57 PM
5	00414700	Ad-Front Cover [CL-FCOVER]-V1-Standard	7/18/2024 3:57 PM
6	00414697	Ads Parent-Full Page [CL-FP]	7/18/2024 3:57 PM
7	00414698	Ads Parent-Front Cover [CL-FCOVER]	7/18/2024 3:57 PM

The case number "00414699" in the fourth row is highlighted with a blue selection box and a red circle with the number 2, indicating it is the target of the instruction.

Step 5

Upload any files and select “Finish”.

