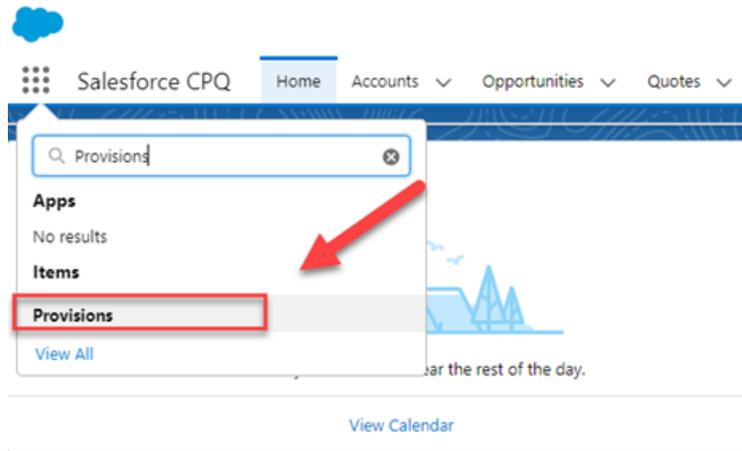


# How to Process Orders

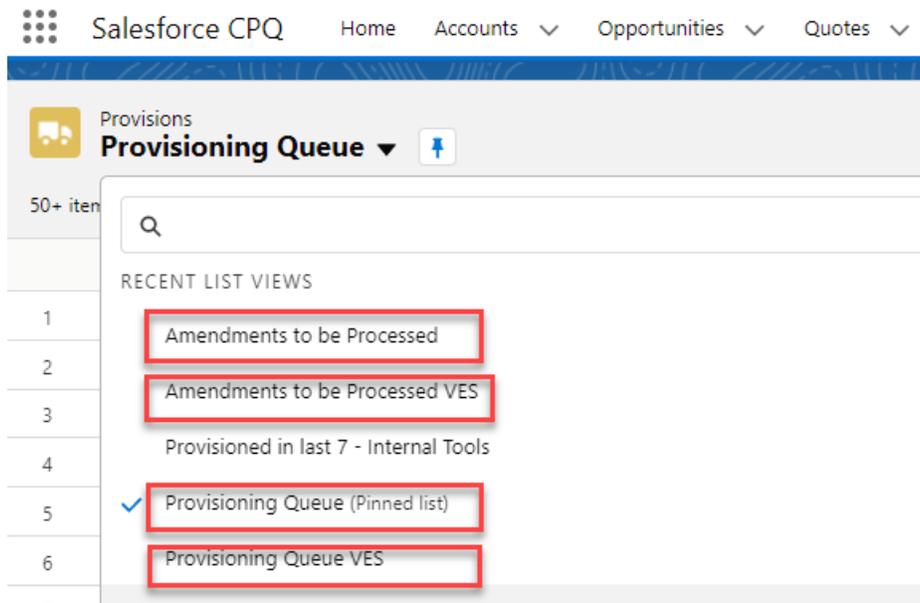
- 1. [Types of Order Queues](#).....2
- 2. [Processing Different Opportunity Types](#).....3
- 3. [Bulk updating](#).....3
- 4. [250ok renewals](#).....4
- 5. [Everest renewals](#).....7
- 6. [BriteVerify renewals](#).....11
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- 8. [RP renewals](#).....20
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- 10. [VES renewals – DemandTools, Dupeblocker, PeopleImport, JobBuilder, Validity Trust Assessments](#).....31

## Types of Order Queues

Go to **Salesforce**, select the dots icon and search for the **Provisions**.



There are four type of order queues we work on – **Provisioning Queue**, **Provisioning Queue VES**, **Amendments to be Processed**, **Amendments to be Processed VES**



## Processing Different Opportunity Types

- **Add On** – There are additional licences added in the new contract (in this case we process it as a renewal) or there is a new product added (in this case the Onboarding Manager must assign an Onboarding Specialist and onboarding is required)
- **Cross-Sell** – The contract was renewed with a new product and the client would need onboarding. Onboarding Specialist will be assigned by the Onboarding Manager.
- **New Business** - These are processed by the Onboarding Manager who assigns an Onboarding Specialist to the new accounts and we start a new onboarding journey.
- **Renewal** – Follow the processes for different products as per this document.
- **Reseller** – It is a partner renewal. Follow the processes for different products as per this document.

## How to do bulk updating

You can update the Provision Date from the Provision Object or update it from the ;ost as shown below. You can update few items at once by ticking the box and selection Apply. Don't forget to press Save to save your changes.

Provisions											
Provisioning Queue ▾											
8 items selected											
Search this list.											
	Provision Name	Product	Provisi...	Opportunity	Opport...	Account	Created Date	Provisio...	De...	Contract Start ...	Co...
1	<input checked="" type="checkbox"/> FormSwift - 250ok DESIG...	250ok DESIGN (Monthly)	250OK	Auto-Renew 250ok - 0002...	Renewal	FormSwift	09/09/2020 ...	27/09/2021		09/...	
2	<input checked="" type="checkbox"/> FormSwift - 250ok ANALY...	250ok ANALYTICS (Monthly)	250OK	Auto-Renew 250ok - 0002...	Renewal	FormSwift	09/09/2020 ...			09/...	
3	<input checked="" type="checkbox"/> FormSwift - 250ok DMAR...	250ok DMARC (Monthly)	250OK	Auto-Renew 250ok - 0002...	Renewal	FormSwift	09/09/2020 ...			09/...	
4	<input checked="" type="checkbox"/> FormSwift - 250ok INBOX ...	250ok INBOX (Monthly)	250OK	Auto-Renew 250ok - 0002...	Renewal	FormSwift	09/09/2020 ...			09/...	
5	<input checked="" type="checkbox"/> FormSwift - 250ok Monthl...	250ok Monthly Campaigns	250OK	Auto-Renew 250ok - 0002...	Renewal	FormSwift	09/09/2020 ...			10/09/2021	09/...
6	<input checked="" type="checkbox"/> FormSwift - 250ok Monthl...	250ok Monthly Sending V...	250OK	Auto-Renew 250ok - 0002...	Renewal	FormSwift	09/09/2020 ...			10/09/2021	09/...
7	<input checked="" type="checkbox"/> FormSwift - 250ok REPUT...	250ok REPUTATION (Mont...	250OK	Auto-Renew 250ok - 0002...	Renewal	FormSwift	09/09/2020 ...			10/09/2021	09/...
8	<input checked="" type="checkbox"/> FormSwift - 250ok PLATF...	250ok PLATFORM VALIDA...	250OK	Auto-Renew 250ok - 0002...	Renewal	FormSwift	09/09/2020 ...			10/09/2021	09/...
9	<input type="checkbox"/> DSG Retail Ltd. c/o Dixons...	Everest - IP Certification	Internal ...	Auto Renewal - DSG Retail...	Renewal	DSG Retail Ltd. c/o Dixons ...	13/10/2020 ...			21/09/2021	20/...
10	<input type="checkbox"/> The Guardian Life Insuran...	BriteVerify Block Transact...	BriteVerify	Renewal - Guardian Life - ...	Renewal	Guardian Life Insurance	23/09/2021 ...			25/09/2021	24/...
11	<input type="checkbox"/> The Guardian Life Insuran...	Everest Enterprise - (3-12M)	Everest	Renewal - Guardian Life - ...	Renewal	Guardian Life Insurance	23/09/2021 ...			25/09/2021	24/...

## 250ok Renewal

- 1) Open **Opportunity** and **Provision Objects** from the list. From the **Opportunity** open the **Contract**.
- 2) Log in 250ok – [ww.250ok.com/login/250ok?login=standard](http://ww.250ok.com/login/250ok?login=standard)  
Go to **Settings** -> **Administration**

The screenshot shows the top navigation bar of the 250ok application. A red box highlights the 'Settings: 250ok' menu item, which has a notification badge with the number '11062'. Below the navigation bar is a 'Switch Account' dropdown menu with a close button. The main content area is divided into sections: 'MESSAGE CENTER' with links for 'App Notifications', 'Product Updates', 'Seedlist Changes', and 'Known Issues'; 'MY ACCOUNT' with links for 'Settings', 'Manage Child Accounts', 'Account & Reseller Reports', '250ok Experts', '250ok Pricing Calculator', 'Administration' (highlighted with a red box), and 'GDPR/Privacy Requests'.

- 3) Search for the account in **Account Manager**

The screenshot shows the 'Administrative Tasks' section of the 250ok application. The section title is 'Administrative Tasks' with a star icon. Below the title is a 'Select an Action' dropdown menu. The 'Account Management' section is expanded, showing a list of actions: 'Account Manager' (highlighted with a red box), 'Account Alias Lookup', 'Account Identifier', and 'Unlock User Accounts'.

- 4) Make sure that it's the right account by comparing the Salesforce ID. Then update the account as per contract. You can also find the Salesforce ID in the Account URL in Salesforce.

Account name: CareerStep

**Salesforce ID: 001300000pAJsAAG**

Primary account owner: systems@careerstep.com

Can create child accounts: Yes

Child accounts automatically accept TOS: No

Hide upsells in child accounts: No

Terms of service type: Electronic

Account Career Step

Interesting Moments

2 Web

26 Email

SEP 16

EMAIL TYLER BANKS NUR-Full-Funnel-Email.EMAIL/...

Please request yo configuration

Go to the page view

Legacy Info

RP Acct ID	AppBuddy Account ID
RP Entity	0011200001GlytFAAR
RP Acct Type	2500K Account ID
Created By	0012A00002FMB4sQAH
AccountIDFull	Current 250k Customer
Annual Revenue	USD 46,800,000.00
Exchange	Usage Report
	Find Dupes

5) Update account as per contract

Account name: CareerStep  
Salesforce ID: 001300000qA3dsAAG  
Primary account owner: systems@careerstep.com  
Can create child accounts: Yes  
Child accounts automatically accept TOS: No  
Hide upsells in child accounts: No  
Terms of service type: Electronic  
Terms agreed to: Yes  
External ID:   
Monthly mailing volume: 50000  
Include in global stats: No  
Inbox: Yes  
Seedlist group: Group 1  
Expiration date: 9/19/2021  
Purchased tests: 60 per month  
Used tests: 0  
Child test increments:   
This field is calculated upon save

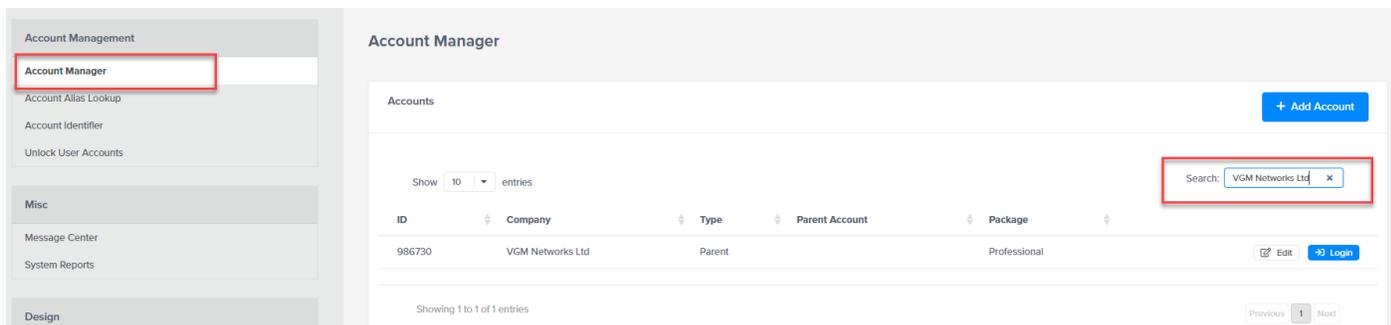
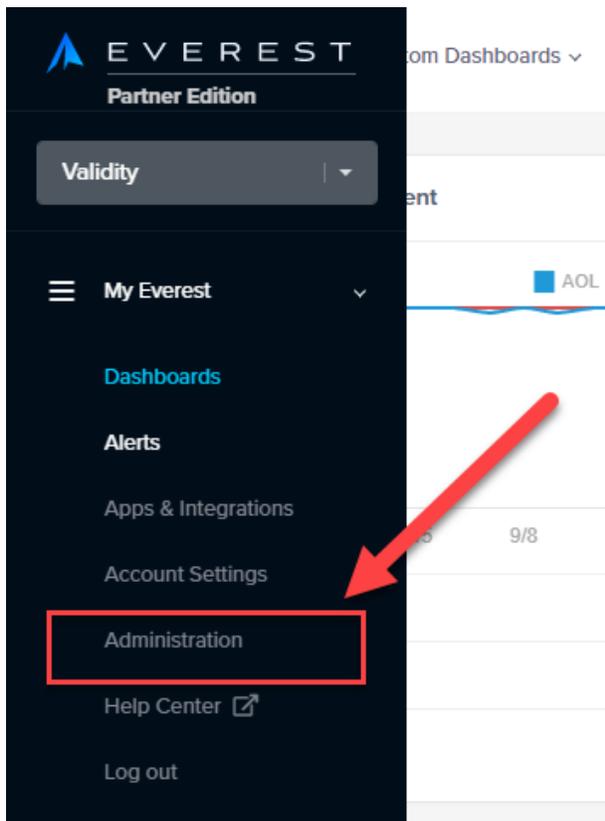
6) Update the **Provision object** with the **Provision Date** and the account number in **External ID**

Provision  
Career Step - 250ok Monthly Campaigns  
Bond ID Status: --None--  
External ID  
Negotiated DPA  
Contact Phone: (801) 769-8505  
Account Number: 0000031454  
Opportunity Migration Date  
Exception End Date  
Exception Notes  
Status: Provisioned  
Bond Group Id  
Provision Date  
Renewal Provision Date  
This field is calculated upon save

You can also update the **Provision Date** from the **Provision** list as shown in the *How to do bulk updating* section.

## Everest Renewal

- 1) Open **Opportunity** and **Provision Objects** from the list. From the **Opportunity** open the **Contract**.
- 2) Log in Everest - <https://everest.validity.com/login>
- 3) Search for the account in **My Everest** -> **Administration** -> **Account Manager**



- 4) Compare the *Salesforce ID* from the account to the one in Salesforce so that you will be sure that it is indeed the correct account.

### Edit Account

Edit Account    Inbox Headers    Login History    Send Sample Test

Account Name: VGM Networks Ltd

Parent Account: Parent account  
This is an auto complete field. Start typing the name of an account or an #id.

**Salesforce ID:** 0011B00002lqs0FQAR

validity.lightning.force.com/lightning/r/Account/0011B00002lqs0FQAR/view

Apps    My Apps    Login : Validity    Login : Salesforce    Log Ins    Everest Onboarding

Search...

Salesforce CPQ    Home    Accounts    Opportunities    Quotes    Soluti

Account  
**VGM Networks Ltd**

Legacy Info	
RP Acct ID	AppBuddy Account ID
RP Entity	2500K Account ID
RP Acct Type	Current 250ok Custor <input type="checkbox"/>
Created By  <a href="#">Shashank Mudlappa</a> , 04/06/2020 20:49	Last Modified By  <a href="#">Jonathan Gree</a>
<b>AccountIDFull</b> 0011B00002lqs0FQAR	SDR Last Activity Date 14/08/2020 08:49
Annual Revenue	SDR with Last Activity

- 5) Open the Subscriptions from the contract and update the account.  
Do not forget – if you have **Certification** in the renewal chatter the Certification team (Leslie Senescu , Taylor Gold and Stephen Paolini) in the **Opportunity**.

Contract # **00026930** + Follow New Custom

Account Name	Contract Status	Contract Start Date	Contract End Date	Contract Term (months)	Status
<a href="#">VGM Networks Ltd</a>	Active	14/09/2021	13/09/2022	12	Activated

**Related** Details

**Subscriptions (6+)** New

Subscription #	Product	Quantity	Start Date
<a href="#">SUB-0089569</a>	Everest Professional - (36-120M)	1.00	14/09/2021
<a href="#">SUB-0089570</a>	Users	10.00	14/09/2021
<a href="#">SUB-0089573</a>	Reputation Monitoring IPs & Dom...	20.00	14/09/2021
<a href="#">SUB-0089571</a>	Inbox Placements	1,400.00	14/09/2021
<a href="#">SUB-0089572</a>	Design Tests	1,400.00	14/09/2021
<a href="#">SUB-0089576</a>	BriteVerify Annual Verifications - SL...	1,500,000.00	14/09/2021

[View All](#)

Account Name:

Parent Account:   
This is an auto complete field. Start typing the name of an account or an #id.

Salesforce ID:

External ID:

Include in global stats:

Edition:

Volume Tier:

Start date:

Expiration date:

Add-ons:

- Validation
- Seedlist Optimization
- Design & Content
- View Time Optimization (VTO)
- Competitive Intelligence
- Certification

## Design & Content

Annual design tests:	<input type="text" value="1400"/>
Tests used:	<input type="text" value="0"/>
Rendering engine: ?	<input type="text" value="250ok"/>

## Engagement

Annual open events: ?	<input type="text" value="36000000"/>
-----------------------	---------------------------------------

## Validation

Annual verification credits:	<input type="text" value="4500000"/>
------------------------------	--------------------------------------

**Beta access:** Do not turn this on unless you know what you're doing and you are certain it should be enabled for this account.

Enable beta access

Cancel

✓ Save

## 6) Update the Provision Object in Salesforce – add Everest ID and Provision Date

The screenshot shows the Salesforce interface for a Provision Object. The main header is "Provision VGM Networks Ltd - Everest Professional - (36-120M)". Below this, there are tabs for "Details", "History", and "Related". The "Details" tab is active, showing fields for "Opportunity Type", "Provision System", "Provision Date", and "De-Provision Date". A red arrow points to the "Add Org/Realm/Bond ID(s)" button. A modal window titled "Add Org/Realm/Bond ID(s)" is open, showing a "New Org Id" field and a "\* Type" dropdown menu with "Everest Id" selected. A "Next" button is visible at the bottom right of the modal.

You can also update the **Provision Date** from the **Provision** list as shown in the *How to do bulk updating* section.

## BriteVerify Renewal

- 1) Open **Opportunity, Contract** and **Provision** object
- 2) Open BriteVerify - <https://admin.briteverify.com/admin>  
Go to **Accounts** and search for the account

Accounts

Enterprise Business Partners, LLC Find Reset

Account Name	Company	Terms	Country	Current Spend	Signed Up	Campaign	Plan	Type	Rep	Status
Enterprise Business Partners, LLC	Enterprise Business Partners, LLC	net_30	USA	\$0.00	2018-09-18	validitybundle	Connect Legacy	Standard	james	active

Download

- 3) Compare the Salesforce ID from the account to the one in Salesforce so that you will be sure that it is indeed the correct account.

## Enterprise Business Partners, LLC

Status:	active
Status Reason:	
Plan:	Connect Legacy
Terms:	net_30
Remaining Credits:	200,000

### Account Details

Account Name:	Enterprise Business Partners, LLC
Company:	Enterprise Business Partners, LLC
Account Id:	112463
Salesforce ID:	0011B0000242rkyQAA

validity.lightning.force.com/lightning/r/Account/0011B0000242rkyQAA/view

Apps My Apps Login: Validity Login: Salesforce Log Ins Everest Onboard

Salesforce CPQ Home Accounts Opportunities Quotes Sc

Account Enterprise Business Partners, LLC

Additional Information

Salesforce Org Id 00d3000000n357

Purchased from CRMfusion

DemandTools:DupeBlocker:PeopleImport

Training Purchased Status

DemandTools

4) From the **Go To** button choose **Subscription Plans** and then choose **Add Subscription Plan**

Subscription Plans are credit contracts. Create a new Subscription Plan of the corresponding type to apply credits to an account. Options are fixed (one-time purchases), recurring (credits that expire and renew on the first of each month), promotional (one time bonus credits). Use this page to view the most recent credit stats for each subscription plan. Click into a subscription plan to see information on all the related credits.

Available Credits: 100,000 | Overage: 0

Type	Status	Allows Overage?	Starts On	Ends On	Quantity	Used Credits	Overage Credits	Expired Credits	Pcode	Notes	Ingested On	Contract Number
Recurring	active	true	10/06/2019	09/20/2021	100,000	0	0	0		auto-created for backfill		N/A
Recurring	expired	true	04/04/2019	09/30/2020	350,000	0	0	0		auto-created for backfill		N/A

5) Update the subscription plan as per **Contract**.

Contract **00026854**

Account Name: [Enterprise Business Partners, LLC](#) | Contract Status: Active | Contract Start Date: 21/09/2021 | Contract End Date: 20/09/2022 | Contract Term (months): 12 | Status: Activated

**Related** | Details

**Subscriptions (6)**

Subscription #	Product	Quantity	Start Date
<a href="#">SUB-0089232</a>	Validity Connect-Salesforce - RENEWAL ONLY	709.00	21/09/2021
<a href="#">SUB-0089234</a>	Validity DupeBlocker-Salesforce	709.00	21/09/2021
<a href="#">SUB-0089235</a>	Validity Job Builder-Salesforce	709.00	21/09/2021
<a href="#">SUB-0089236</a>	Validity DemandTools-Salesforce	709.00	21/09/2021
<a href="#">SUB-0089237</a>	Validity PeopleImport-Salesforce	709.00	21/09/2021
<a href="#">SUB-0089233</a>	Validity BriteVerify Email Verification-Bundle	100,000.00	21/09/2021

[View All](#)

Make sure that the plan Type is *Fixed* when renewing an annual contract.

If you are adding BV as part of Validity Connect bundles that have monthly allotments for BV imported into DT, then plan should be *Recurring*.

The *Promotional* type is when client has a trial. Make sure that, when a BriteVerify subscription trial

decides to buy, we need to remove the 'trial' pcode from their account when we go in *Subscriptions* to give them contract credits.

[BACK TO ACCOUNT](#) / [SUBSCRIPTION PLANS](#) / ADD SUBSCRIPTION PLAN

### New Subscription Plan

Please note recurring subscription plans are automatically renewed on the first of each month through the end date. Promotional plans are not allowed to have overage.

Type	Fixed
Starts On	2021-09-21
Ends On	2022-09-20
Quantity	100,000
Allow Overage?	<input checked="" type="checkbox"/>
Notes	SUB-0089233 Validity BriteVerify Email Verification-Bundle - contract 00026854
Contract Number	8004v000002AzQOAAQ

6) Update the **Provision** object and add the account number in **External ID**

Provision  
Enterprise Business Partners, LLC - Validity BriteVerify Email Verification-Bund

External ID 112463	Exception Notes
Negotiated CPA <input type="checkbox"/> This field is calculated upon save	Status To Be Done This field is calculated upon save
Contact Phone (410) 772-2502 This field is calculated upon save	Bond Group Id
Account Number 0000052910 This field is calculated upon save	Provision Date
Opportunity Migration Date This field is calculated upon save	Renewal Provision Date
Migration Date	De-Provision Date
Contact	External Parent Account Id
Short Notes	External Account ID
Suspension Date	External Contact ID

# Enterprise Business Partners, LLC

Go To ▼

Status:	active
Status Reason:	
Plan:	Connect Legacy
Terms:	net_30
Remaining Credits:	100,000

## Account Details

Account Name:	Enterprise Business Partners, LLC
Company:	Enterprise Business Partners, LLC
Account Id:	<a href="#">112463</a>
Salesforce ID:	0011B0000242rkyQAA
CAE Name:	

You can also update the **Provision Date** from the **Provision** list as shown in the *How to do bulk updating* section.

# GridBuddy Legacy Renewal

## 1) Open Provision Name, Opportunity, and Account

Provisions  
Provisioning Queue VES

50+ Items • Sorted by Contract Start Date • Filtered by Provisioning Queue - 6 more filters applied • Updated 4 minutes ago

	Provision Name	Product	Provisio...	Opportunity	Oppo...	Account	Created Date	Provision Date	D...	Contract St...	Contract Enc
1	Boomtown, LLC - Grid...	GridBuddy - Enterprise Edition Lice...	Gridbuddy	Boomtown, LLC   VSP ...	Add-On	Boomtown, LLC	21/01/2021 20:22			10/09/2021	09/09/2022
2	Incapital LLC - Validity ...	Validity Impact-Salesforce	VES	Renewal - Insperec Tec...	Renewal	Incapital LLC	31/08/2020 19:05			13/09/2021	12/09/2022
3	Veterans First Mortgag...	Validity Impact-Salesforce	VES	Auto Renewal   Vetera...	Renewal	Veterans First Mortgage	31/08/2020 19:20			14/09/2021	13/09/2022
4	Payroll Ventures - DBA...	Validity Impact-Salesforce	VES	Auto-Renewal Impact ...	Renewal	Payroll Ventures - DBA...	03/09/2020 16:14			14/09/2021	13/09/2022

## 2) From the Opportunity open the Contract

Salesforce CPQ Home Accounts Opportunities Quotes Solution Groups Discount Schedules Quote Templates Products Product Rules Reports Dashboards Shopping Subscri

Opportunity  
Boomtown, LLC | VSP Expansion | 2021

Executive Sponsor

PO & Portal Information

Is Purchase Order (PO) required? No

Is Payment Portal Required by Finance? No

Financial

Account Street Address: 1505 King St Ste 101

Commission Rate Method: Subscription

Payment Method

Closed Won Role: Account Executive - Growth - Bulldogs

Formatted Revenue by Revenue Value

Contracts (1)

00026860

Contract Name: Boomtown, LLC

Account Name: Activated

Status: Working Sales Ops Review

## 3) Check the number of licences in the contract and compare them to the previous contract (if any). Open the Account and search for the previous contract in Contracts

Account  
Boomtown, LLC

Contracts (6+)

Contract Number	Contract Status	Contract End Date	Annual Contract Value
00026860	Active	09/09/2022	USD 14,292.75
00023230	Active	28/02/2022	USD 10,000.00
00022685	Expired	09/09/2021	USD 13,720.27
00015497	Expired	28/02/2021	USD 10,000.00
00008364	Inactive/Duplicate	09/09/2020	USD 0.00
00009337	Expired	09/09/2020	USD 12,600.00

- Compare the number of licences and if necessary, make amendments. If the number is the same, we do not inform the GridBuddy team. This is because GridBuddy licences do not expire and if there is no change in the number they have, there is no need to notify the team

Contract 00026860

Account Name	Contract Status	Contract Start Date	Contract End Date	Contract Term (months)	Status
<a href="#">Boomtown, LLC</a>	Active	10/09/2021	09/09/2022	12	Activated

Related Details

Subscriptions (1)

Subscription #	Product	Quantity	Start Date
<a href="#">SUB-0089259</a>	GridBuddy - Enterprise Edition Licenses - REN...	125.00	10/09/2021

[View All](#)

**Previous Contract:**

Contract 00022685

Account Name	Contract Status	Contract Start Date	Contract End Date	Contract Term (months)	Status
<a href="#">Boomtown, LLC</a>	Expired	10/09/2020	09/09/2021	12	Activated

Related Details

Subscriptions (3)

Subscription #	Product	Quantity	Start Date
<a href="#">SUB-0080639</a>	GridBuddy - Enterprise Edition Licenses - REN...	5.00	04/05/2021
<a href="#">SUB-0070648</a>	GridBuddy - Enterprise Edition Licenses - REN...	10.00	22/01/2021
<a href="#">SUB-0070090</a>	GridBuddy - Enterprise Edition Licenses - REN...	105.00	10/09/2020

[View All](#)

As we can see the client had 120 GridBuddy licences and now they have 125. In this case what we need to do it leave a message to the GridBuddy team to make the amendment. Go back to the Opportunity and Select Chatter. Use the Share an update box to leave your message, for example:

*Hi @Sophie Krich-Brinton @Forrest Tarsa*

*GB Legacy Renewal*

*3 GridBuddy Operations Licenses*

Account:

Contract:

ORG ID:

Thank you!

Opportunity  
**Boomtown, LLC | VSP Expansion | 2021**

Account Name: [Boomtown, LLC](#) | Close Date: 09/09/2021 | Amount: USD 14,292.75 | Opportunity Owner: [Marcello Felisberto](#) | Stage: Closed Won

Details | Activity | **Chatter** | DocuSign CLM

Post

Hi @[Sophie Krich-Brinton] @[Forrest Tarsa]  
GB Legacy Renewal  
125 GridBuddy Licenses (they used to have 120)  
Account: **Boomtown, LLC**  
Contract: <https://validity.lightning.force.com/lightning/r/Contract/8004v000002AzRWAA0/view>  
no Org ID on file  
Thank you!

To: Validity Only

Share

You can take the Org ID from the License Agreements (*Account -> Related -> Licence Agreement*). In the example below there is not Licence Agreement on file, therefore we tell the team we don't have it on file. We can ask them if they can provide it and update it on the Provision Object.

Account  
**Boomtown, LLC**

Licenses (0) [New]

DupeBlocker Potential Duplicates (0)

**License Agreements (0)** [New]

In the example below there is a licence Agreement and you can take it from there.

Account  
**Centurion Traffic Management**

+ Follow    New Business Oppor

**License Agreements (1)**    Settings    Refresh    New

1 item • Updated a few seconds ago

<input type="checkbox"/>	License Agreement Name	
1	<a href="#">Centurion Traffic Management</a>	

[View All](#)

License Agreement  
**Centurion Traffic Management**

▼ **Salesforce Org Information (Production Org's Only)**

Org ID 1	00D0Y000001Kmb8	
Org ID 2		
Org ID 3		
Org ID 4		
Org ID 5		

5) In the **Provision** object update the **Provision Date** and add the **Org ID**.

Provision  
**Boomtown, LLC - GridBuddy - Enterprise Edition Licenses - RENEWAL ONLY**    + Follow

*This field is calculated upon save*  
Contact Phone  
(843) 300-3314

*This field is calculated upon save*  
Account Number  
0000247747

*This field is calculated upon save*  
Opportunity Migration Date

*This field is calculated upon save*  
Billing Frequency  
Annual

Short Notes

Provision Date

Renewal Provision Date

De-Provision Date

External Account ID

External Contact ID

Provision  
**Boomtown, LLC - GridBuddy - Enterprise Edition Licenses - RENEWAL ONLY** + Follow

*This field is calculated upon save*  
 Product Provision Code  
 GB  
*This field is calculated upon save*  
 Opp Customer Service Case Created  
  
*This field is calculated upon save*  
 Service & Support SLA Language  
  
*This field is calculated upon save*  
 Case Opened Date  
*This field is calculated upon save*

Exception Notes

Created By  
 Kayla Chewning, 21/01/2021 20:22

Opportunity Type  
 Add-On  
*This field is calculated upon save*  
 Opportunity Type  
 Renewal

Last Modified By  
 Brandon Ferro, 09/09/2021 21:30

Record Type  
 VES Record Type

Provision Date/Time  
 Date  Time

De-Provision Date/Time  
 Date  Time

Provision  
**Boomtown, LLC - GridBuddy - Enterprise Edition Licenses - RENEWAL ONLY** + Follow Add Org/Realm/Bond ID(s) New Change F

Opportunity Type	Provision System	Provision Date	De-Provision Date
Add-On	Gridbuddy	10/09/2021	

**Add Org/Realm/Bond ID(s)**

New Org Id

\* Type

You can also update the **Provision Date** from the **Provision** list as shown in the *How to do bulk updating* section.

# RP renewals

## 1) Open Provision Name and Opportunity

Provisions  
Provisioning Queue

1 item selected

	Provision Name	Product	Provisi...	Opportunity	Opport...	Account	Created Date	Provisio...
16	<input checked="" type="checkbox"/>	Ltd Commodities LLC - RP...	RP-Services-Gold Plus - RE...	Internal ...	Auto-Renewal - Ltd Comm...	Renewal	Ltd Commodities LLC	18/09/2020 ...
17	<input type="checkbox"/>	Tractor Supply Co. - Verific...	Verifications	Everest	Renewal - Tractor Supply -...	Renewal	Tractor Supply Co.	30/09/2020 ...

## 2) Open Return Path platform from My Apps -> RP Internal Tools

Access my App from here: <https://myapplications.microsoft.com>

Search for the account from Main Menu -> Delivery Assurance -> Client Management -> Administrative Accounts

Main Menu : [Delivery Assurance](#)

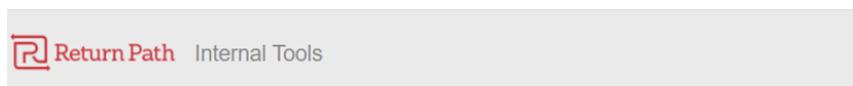
### Administer Accounts [Add a company](#) [Move a company](#)

Company Search:  Starts with:  Has Product:   Show Inactive

14,252 Companies

Company ▲	Users	Parent	Env	Account Type
<a href="#">New Merck Canada 7325199</a>	11		DAS 1	Child Account Billable
<a href="#">TD Retail Card Services 6418571</a>	4		DAS 1	Child Account Billable
<a href="#">&lt;img src=x onerror=alert(1)&gt;</a>	1		DAS 1	RP Internal Account

## 3) If you can't find it look for user. Take the user email address from Salesforce Related -> Contracts. Search for the user from Main Menu -> Delivery Assurance -> Client Management -> Account Information Lookup

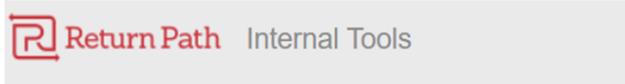


Main Menu : [Delivery Assurance](#)

### Account Information Lookup

In the text field below, type in the email or name of the client account you are trying to find then click submit. Once you click submit, the lookup tool will find as many accounts that fit the search criteria. If using a name, you must use both first and last name.

Name or Email:



Main Menu : [Delivery Assurance](#) : [Account Information Lookup Tool](#)

### Your search found these results:

First Name: Gonalo Uva  
Last Name: Uva  
Current Status: Active  
Administrator? No  
Account Name: Cardume  
Email: guva@goodlife.pt

- Then look for the account name in Main Menu -> Delivery Assurance -> Client Management -> Administrative Accounts. Make sure that this is the right account by comparing the Salesforce Account ID in Internal Tools with the one in Salesforce

**Account Settings for Ltd Commodities LLC**

Company Name: Ltd Commodities LLC  
 Company Abbrev: Ltd  
 Account Type: Direct Client  
 Environment: DAS 1  
 Status: Active  
 Skin: Main (monitor.returnpath.net)  
 Account Director: Select an Account Director  
 Service Level: Manager  
 Channel: Direct  
 Communication Prefs: Yes  
 Billing Cycle: Monthly  
 Audience Type: Consumer  
 Industry Type: Retail/Cataloger  
 Contract Start Date: 10/01  
 External Account ID:  
 Salesforce Account ID: 0011B00002DGNFGQA5  
 2500k Account ID: 844565

**Account Detail Page**

Account: Ltd Commodities LLC

Legacy Info

- RP Acct ID: 00100000003Uw2HAAS
- RP Entity: RP Inc
- RP Acct Type: Current Client/Partner
- Created By: Anja Miller, 02/07/2018 23:37
- AccountIDFull: 0011B00002DGNFGQA5

- Open the **Contract** from the **Opportunity** in Salesforce and update the allotments accordingly in Return Path under *Products*

Contracts > 00020177

**Subscriptions**

6 items • Sorted by Quantity • Updated a minute ago

	Subsc...	Product	Quantity ↑	Start Date	End Date	S...
1	SUB-0058...	RP-Services-Gold Plus - RENEWAL ONLY	1.00	01/10/2020	30/09/2021	Active
2	SUB-0058...	RP-IP Count	10.00	01/10/2020	30/09/2021	Active
3	SUB-0058...	RP-Inbox Preview Events	300.00	01/10/2020	30/09/2021	Active
4	SUB-0058...	RP-Inbox Placement Events	900.00	01/10/2020	30/09/2021	Active
5	SUB-0058...	RP-Combined Events	1,200.00	01/10/2020	30/09/2021	Active
6	SUB-0058...	RP-Pixel Count	12,000,000.00	01/10/2020	30/09/2021	Active

- Select the **Email Client Monitor** and fill out the pixel counts. Note that in Return Path you must put monthly limit and in the contract it is annually. You need to divide the annual allotment by 12 to get the monthly limit. For example in the contract there are 12 000 000 Pixel Count and in **Email Client Monitor** the monthly contract limit is 1 000 000. Next select the Help Center.

**Products for Ltd Commodities LLC**

Action Plan (BETA - DO NOT USE)

Certification

Child Account Management

Client Profile [Export Whitelisting Questions](#) | [Export IPs](#)

Complaint Analyzer [9 Feedback Loops](#)

Dashboard Announcements

Email Client Monitor

**Sub-products**

Email Client Monitor API (BETA - DO NOT USE)

Engagement Pixel Phase 2

Subscriber Level Data Extracts [Configure Extract FTP](#)

**Configuration Options**

Monthly Contract Limit:  The system will refuse any messages above this number

Force Return Path Domain For Pixel Pixel domains will always display as pixel.monitor.returnpath.net

Compress Extracts with PKZip (.zip) Normal Compression uses gzip (.gz)

Email Client Monitor URLs:

- <http://pixel.monitor1.returnpath.net/pixel.gif?r=3a2de29b0ded5812d9d2664022196185a189fdb>
- <https://pixel.monitor1.returnpath.net/pixel.gif?r=3a2de29b0ded5812d9d2664022196185a189fdb>

Email Fraud Protection

Help Center

**Sub-products**

Hide Articles

Fill out the inbox placement events in **Inbox Monitor** and untick **Inbox Optimizer for Gmail** and **Inbox Optimizer for Yahoo**

Inbox Monitor [Edit Seed List](#) | [Manage From Domain Mapping](#) | [Manage IP Matching](#)

**Sub-products**

Campaign Tagging

Disable AOL subscriber performance data (panel and smartseed)

Disable Gmail subscriber performance data (panel and smartseed)

Disable Microsoft subscriber performance data (panel and smartseed)

Disable Yahoo! subscriber performance data (panel and smartseed)

Display Complaint Count

Display Diagnostics

Display ISP Profile

ESP Integration

From Domain Mapping Administration

Inbox Monitor API API URL: api1.returnpath.net

Inbox Monitor UI

Inbox Optimizer - Affiliate Int. (BETA-DONT USE)

Inbox Optimizer - Link Check WARNING: This feature could cause reference seeds to be unsubscribed if client uses one-click unsubscribe links.

Inbox Optimizer for Gmail

Inbox Optimizer for Yahoo

Reports

SmartSeeds

**Configuration Options**

Annual Overage Limit:  An alert will be sent when they exceed this limit and overage charges will be applied

Annual Absolute Limit:  The system will refuse any campaigns that exceed this limit

Fill out the **Inbox Preview** events (*the equivalent of Design Tests in Everest*) in both annual overage limit and annual absolute limit. Next put the *number of IPs* in **Reputation Data**.

Inbox Preview 32 of 43 rendering clients

**Sub-products**

Inbox Preview API

Rendering Client Settings

**Configuration Options**

Annual Overage Limit:  An alert will be sent and overage charges will be applied w

Annual Absolute Limit:  The system will refuse any Inbox Preview test submissions

Render lifetime (in hours):  Default: 90 days (2160 hours)

Partner Platform (turn on for partners only) [Manage \(ThreatWave\) IPs and CIDRs](#)

Performance Summary (only for default skins)

Return Path Platform (do not turn on for partners or their children)

**Sub-products**

ESP Reporting

Everest

Reputation Data 11 IPs 0 Domains [SNDS Data Download NOT Configured](#)

**Sub-products**

Auto-populate Inbox Monitor IPs into Rep

Download Complaint Emails

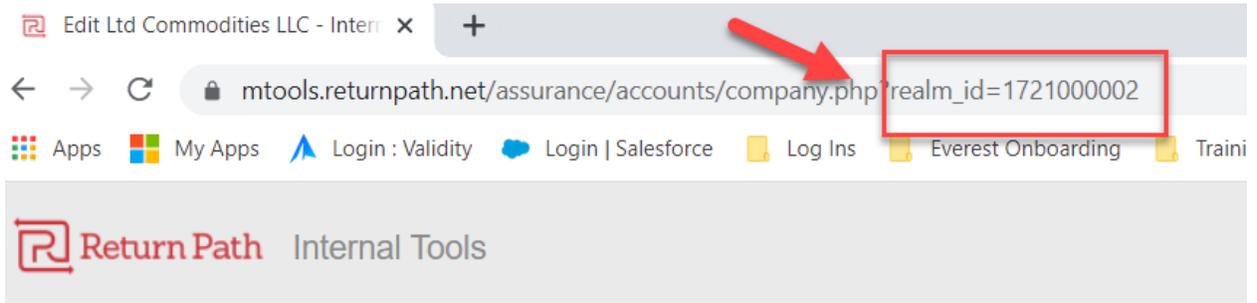
**Configuration Options**

Max Number of IPs:

View Time Optimization

Single Sign-on [Configure Keys](#)

- 7) Finally Click on Update. Go back to Salesforce to update the **Provision** object, **Provision Date** and add the *realm ID*.



Main Menu : Delivery Assurance : Administer Accounts

## Ltd Commodities LLC [Move this company](#)

Account Settings | Products | Users | Child Companies | Security Settings | Engagement | History

### Account Settings for Ltd Commodities LLC

Company Name:

Company Abbrev:

Account Type:

Environment:

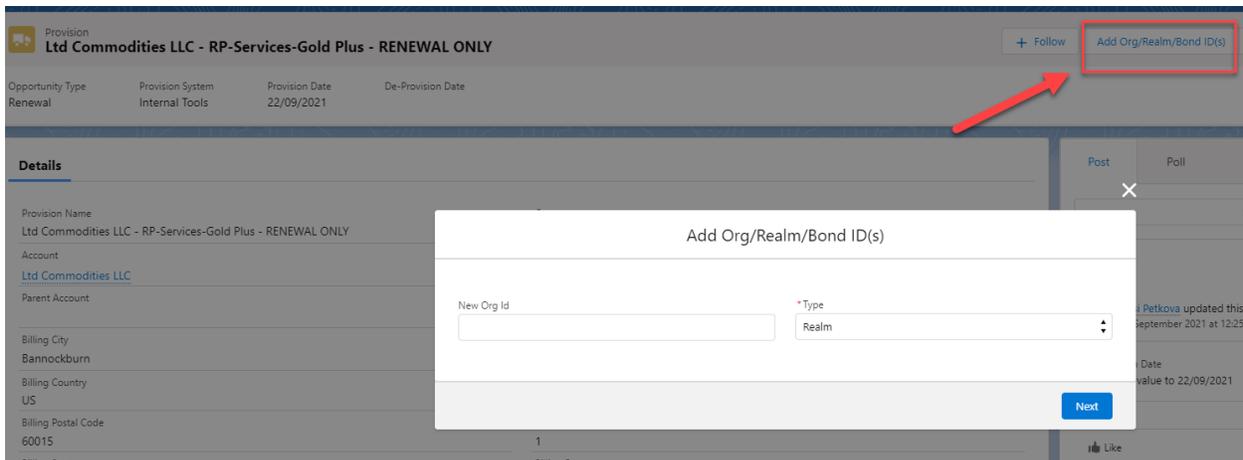
Status:

Skin:  [Show D2 Skins](#)

Account Director:

Service Level:

Channel:



Provision  
**Ltd Commodities LLC - RP-Services-Gold Plus - RENEWAL ONLY** + Fol

---

*This field is calculated upon save*

Contact Phone  
(847) 295-6058

*This field is calculated upon save*

Account Number  
0000246065

*This field is calculated upon save*

Opportunity Migration Date  
*This field is calculated upon save*

Migration Date

Contact ⓘ  
Lisa Frederiksen Falk

Short Notes

To Be Done  
*This field is calculated upon save*

Bond Group Id

**Provision Date**

Renewal Provision Date

De-Provision Date

External Parent Account Id

External Account ID

---

Created By  
Jonathan Greenip, 18/09/2020 18:16

Opportunity Type  
Renewal

Last Modified By  
Kayla Chewning, 20/09/2021 15:14

Record Type  
~~RP Record Type~~

**Provision Date/Time**

Date  Time

**De-Provision Date/Time**

Date  Time

Cancel Save

You can also update the **Provision Date** from the **Provision** list as shown in the *How to do bulk updating* section.

## RP Certification Renewal

1) Open **Opportunity** and the **Provision Object**.

2) Find the **Contract** from the **Opportunity**.

Subscription #	Product	Quantity	Start Date
<a href="#">SUB-0087677</a>	RP-Certification	60,000,000.00	15/09/2021
<a href="#">SUB-0087678</a>	Certification Annual Email Volume	60,000,000.00	15/09/2021

3) Open Return Path platform from *My Apps* -> *RP Internal Tools*

Access my App from here: <https://myapplications.microsoft.com>

Search for the account from Main Menu -> Delivery Assurance -> Client Management -> Administrative Accounts

- 4) If you can't find it look for user. Take the user email address from Salesforce *Related -> Contracts*. Search for the user from Main Menu -> Delivery Assurance -> Client Management -> Account Information Lookup

- 5) Then look for the account name in Main Menu -> Delivery Assurance -> Client Management -> Administrative Accounts. Compare the Salesforce ID in Internal Tools with the one in Salesforce

6) Go to **Products** and take the *bond ID* and *realm ID* from the URL

Products for Cardume - Internal | x

mtools.returnpath.net/assurance/accounts/company.php?realm\_id=10476602953&tab=products

Apps My Apps Login : Validity Login | Salesforce Log Ins Everest Onboarding Training Recours

**Cardume** Move this company

Account Settings **Products** Users Child Companies Security Settings Engagement History

**Products for Cardume**

Action Plan (BETA - DO NOT USE)

Certification

**Sub-products**

Certification Alerts (BETA)

Certification SF Community Forum

**Configuration Options**

SSC GroupID:  Enter the Bond Group ID from SSC

Child Account Management

Client Profile [Export Whitelisting Questions](#) | [Export IPs](#)

Complaint Analyzer [0 Feedback Loops](#)

Dashboard Announcements

7) Leave a message for the Certification team (*Leslie Senescu, Taylor Gold and Stephen Paolini*) in the Chatter with type of the renewal (RP renewal) volume (from the contract), realm ID and Bond ID

Opportunity  
**Renewal - Circunland S.A. - 9/14/2021**

+ Follow Book Meeting New Legal Sales Sup

Details Activity **Chatter** DocuSign CLM

Post Poll

Hi @[Leslie Senescu] @[Taylor Gold] @[Stephen Paolini] | RP cert renewal; volume 60,000,000 realm ID 10476602953 and Bond ID 1028500

To Validity Only

Share

8) Update the **Provision** object with the provision date. Add the *realm ID* and *Bond ID*

Provision  
**Circunland S.A. - RP-Certification** + Follow

Contact Phone  
00351214201360  
*This field is calculated upon save*

Account Number  
0000248453  
*This field is calculated upon save*

Opportunity Migration Date  
*This field is calculated upon save*

Migration Date

Contact ⓘ  
Francisco Barbosa

Short Notes

Suspension Date

MSSA Processor Only  
*This field is calculated upon save*

Bond Group Id  
1028500

Provision Date

Renewal Provision Date

De-Provision Date

External Parent Account Id

External Account ID

External Contact ID

External Product ID

Provision  
**Circunland S.A. - RP-Certification**

ESP ⓘ

Brands/Domains

Types of Mail Sent ⓘ

Signup URL ⓘ

Created By  
Thomas Hurley, 28/09/2020 16:50

Opportunity Type  
Renewal

Business Description ⓘ

Email Program Goals and Priorities ⓘ

Expectations from RP

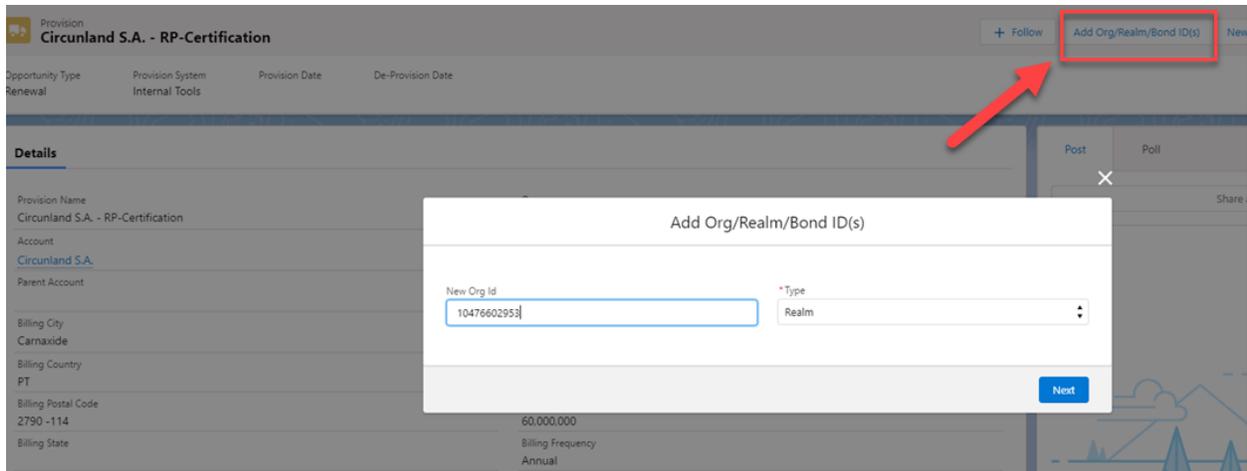
Last Modified By  
Jonathan Greenip, 11/08/2021 18:49

Record Type  
RP Record Type

Provision Date/Time  
Date Time

De-Provision Date/Time  
Date Time

Cancel Save



You can also update the **Provision Date** from the **Provision** list as shown in the *How to do bulk updating* section.

## VES Renewal

In VES we renew: DemandTools, DemandTools V, Dupeblocker, PeopleImport, JobBuilder, Validity Trust Assessments.

### DemandTools V

- If customers renew a legacy DemandTools bundle, but have downloaded DemandTools V (you will see this as a product license in VES) - **please renew BOTH legacy and DTV**
- If customers renew a new DemandTools V and have had legacy previously - **please renew BOTH legacy and DTV**
- For Net NEW DemandTools V - **only provision DemandTools V**

- 1) Open **Provision Name, Opportunity, and Account**
- 2) Open VES from here: <https://ves.validity.com/>
- 3) Search for the account by using the *Org ID*. Find the *Org ID* in the **Account -> Related -> License Agreements**

Account: Enterprise Business Partners, LLC

View All

License Agreements (1)

License Agreement Name: Enterprise Business Partners, LLC

View All

validity Accounts

home / Accounts / Accounts

Create new Account

00D3000000n357 Search Clear Search

Account ID	Account Name	Suspended	NFP	Partner	Date Created
38231	Enterprise Business Partners, LLC	false	false	false	2011-07-20T11:59:28

Displaying 1 - 1 of 1 accounts

< < 1 > >

#### 4) Open the **Contract** from the **Opportunity**

The screenshot shows the Salesforce CPQ interface for a contract. The URL is <https://validity.lightning.force.com/lightning/r/Contract/8004v000002AzQAA0/view>. The contract details are as follows:

Account Name	Contract Status	Contract Start Date	Contract End Date	Contract Term (months)	Status
<a href="#">Enterprise Business Partners, LLC</a>	Active	21/09/2021	20/09/2022	12	Activated

Below the details is a progress bar with two green segments and a blue segment. The 'Related' tab is active, showing a table of subscriptions:

Subscription #	Product	Quantity	Start Date
<a href="#">SUB-0089232</a>	Validity Connect-Salesforce - RENEWAL ONLY	709.00	21/09/2021
<a href="#">SUB-0089234</a>	Validity DupeBlocker-Salesforce	709.00	21/09/2021
<a href="#">SUB-0089235</a>	Validity Job Builder-Salesforce	709.00	21/09/2021
<a href="#">SUB-0089236</a>	Validity DemandTools-Salesforce	709.00	21/09/2021
<a href="#">SUB-0089237</a>	Validity PeopleImport-Salesforce	709.00	21/09/2021
<a href="#">SUB-0089233</a>	Validity BriteVerify Email Verification-Bundle	100,000.00	21/09/2021

A 'View All' link is present below the subscription table.

5) Update the *Product Licences* by updating the end date and number of licences for the installed products. If the Trial button is on, turn it off. If there is an installed product that is not on their contract do not update the dates.

Details   Contacts   Environments   **Product Licenses**   Usage

Product Licenses for Account ID# 38231

Create new Product license

Product	Valid From	Valid Until	Trial	Suspended	Usage	Edit
DemandTools	2012-02-23	2022-09-20	false	false	<a href="#">Usage</a>	<a href="#">Edit</a>
DupeBlocker	2011-09-27	2022-09-20	false	false	<a href="#">Usage</a>	<a href="#">Edit</a>
PeopleImport	2018-09-19	2022-09-20	false	false	<a href="#">Usage</a>	<a href="#">Edit</a>

### Enterprise Business Partners, LLC : Product License Id #4936



Product

DemandTools

License Type

Standard License

Valid From

23/02/2012

Valid To

21/09/2021

Max

709

Used

42

Trial



Suspended



Sandbox: Standard License Type



#### Product Settings

BriteVerify API Key

9f98419a-b7f1-4645-bb90-e77c736ada36

Allow Non-Admins



Cancel

Save Changes

If you are processing *PeopleImport* renewal the *License Type* is Per User. You also need to check if the Admin Access is enabled for the user. Go to **Contacts** and select the user. Select *PeopleImport* from *Assigned Licenses* (tick the box), then go to *PeopleImport User Settings* and select *Admin*.

Contact Id: 664982

First Name: Conner

Last Name: Buchanan

Email: connerb@elsmereeducation.com

Username:

Phone Number:

Role: Standard User

Single Sign-On:  Active  Disable SSO  Marketplace User:

SSO User Id: auth0|5e95dc3812c5b20cac3440de

Assigned Licenses:

DupeBlocker

PeopleImport

←

Last Update Date: 2021-05-06T12:35:20

Contact Id: 664982

PeopleImport License Properties

Admin:  ←

6) Add a note that you have processed the renewal

Enterprise Business Partners, LLC Account ID: 38231

Details | Contacts | Environments | Product Licenses | Usage

Account Name: Enterprise Business Partners, LLC | Account Type: Customer

Account Global Message: Enter Global Message | Internal Salesforce ID: 0011B0000242rkyQAA

Consulting Partner:  | NonProfit:  | Suspended:  | Single Sign On:  Active

Account Note

- [RPetkova](#) 09/17/2021 processed auto renewal
- [CGraf](#) 9/30/2020, processed renewal.
- [ASanders](#) 9/28/20- Extended expiration date until end of the week (10/2) while renewal process is finalized. Signed order form received today.
- [ASanders](#) 9/21/20- Extended expiration date to 9/25/20 while renewal process is finalized. Customer will be renewing and is working with AE currently.

7) Update **Provision** object for each solution. Add the *VES account number*, **Provision Date** and the Org ID

Provision | Enterprise Business Partners, LLC - Validity Connect-Salesforce - RENEWAL ONLY + Fol

Territory T082 <i>This field is calculated upon save</i>	Contract End Date 20/09/2022 <i>This field is calculated upon save</i>
Product Provision Type VES <i>This field is calculated upon save</i>	Provision System VES
<b>VES Account ID</b> 38231	Production Org ID
Contact Alesia Dvorkina	Seat Count 709
Status To Be Done <i>This field is calculated upon save</i>	Trial Status AE Purchased
Expired Trial 1 <i>This field is calculated upon save</i>	Expiration Date
Negotiated DPA <input type="checkbox"/> <i>This field is calculated upon save</i>	External ID
Contact Phone (410) 332-7400 <i>This field is calculated upon save</i>	<b>Provision Date</b>
Account Number 0000052910 <i>This field is calculated upon save</i>	Renewal Provision Date

Provision  
**Enterprise Business Partners, LLC - Validity DemandTools-Salesforce**

+ Follow Add Org/Realm/Bond ID(s)

Opportunity Type: Renewal  
Provision System: VES  
Provision Date: 17/09/2021  
De-Provision Date:

**Details**

Provision Name: Enterprise Business Partners, LLC - Validity DemandTools-Salesforce  
Account: Enterprise Business Partners, LLC  
Parent Account:  
Billing City: Columbia  
Billing Country: US  
Billing Postal Code: 21044  
Billing State: MD  
Billing Street:  
709  
Billing Frequency: Annual  
Type:

**Add Org/Realm/Bond ID(s)**

New Org Id: 00D30000000n3S7  
Type: Org Id

Next

You can also update the **Provision Date** from the **Provision** list as shown in the *How to do bulk updating* section.