FADs

(Future Ads)

Temporary Instructions for entering FADs in Salesforce CPQ

What are FADs?

FAD orders can be used for customers who want to build up credit towards future buys.

What products are eligible?

Clipp

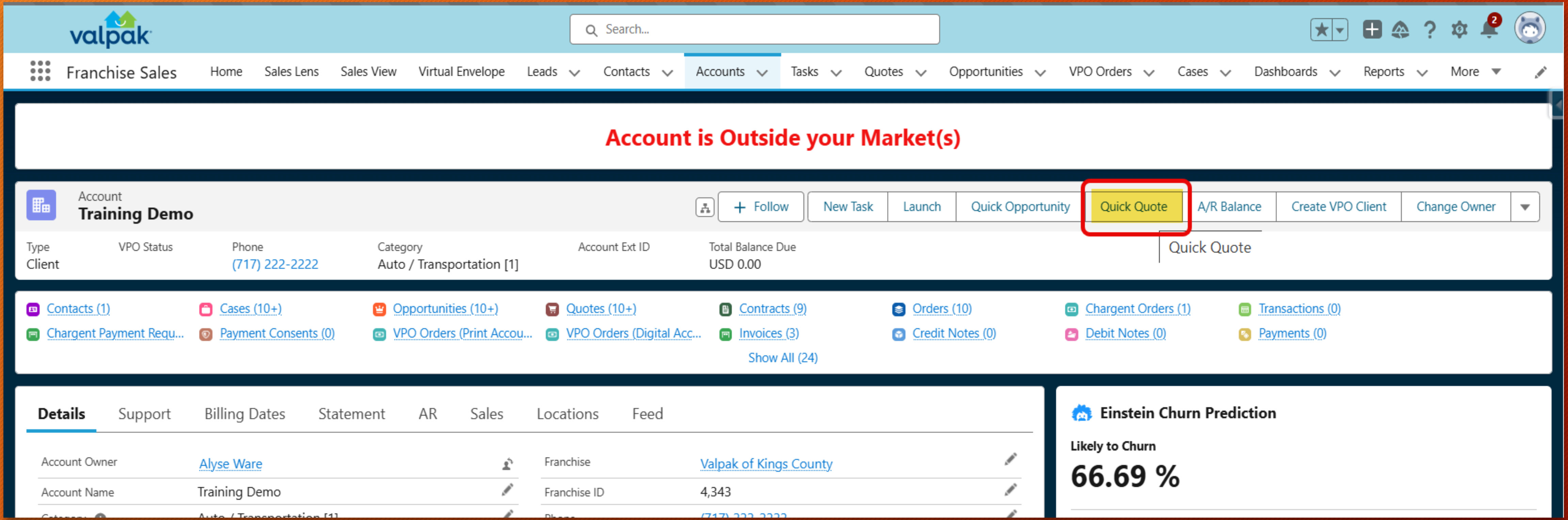
- All On-Page Products
  - (including LDP & Specialty Publications)
- All Off-Page Products
  - (Including LDP & All Digest Products)

Valpak

- CP44

Enter the FAD in CPQ

The FAD will be entered as a Misc. product in CPQ. This will notify the correct departments that an online deal needs to be created and credits can begin to be accrued.



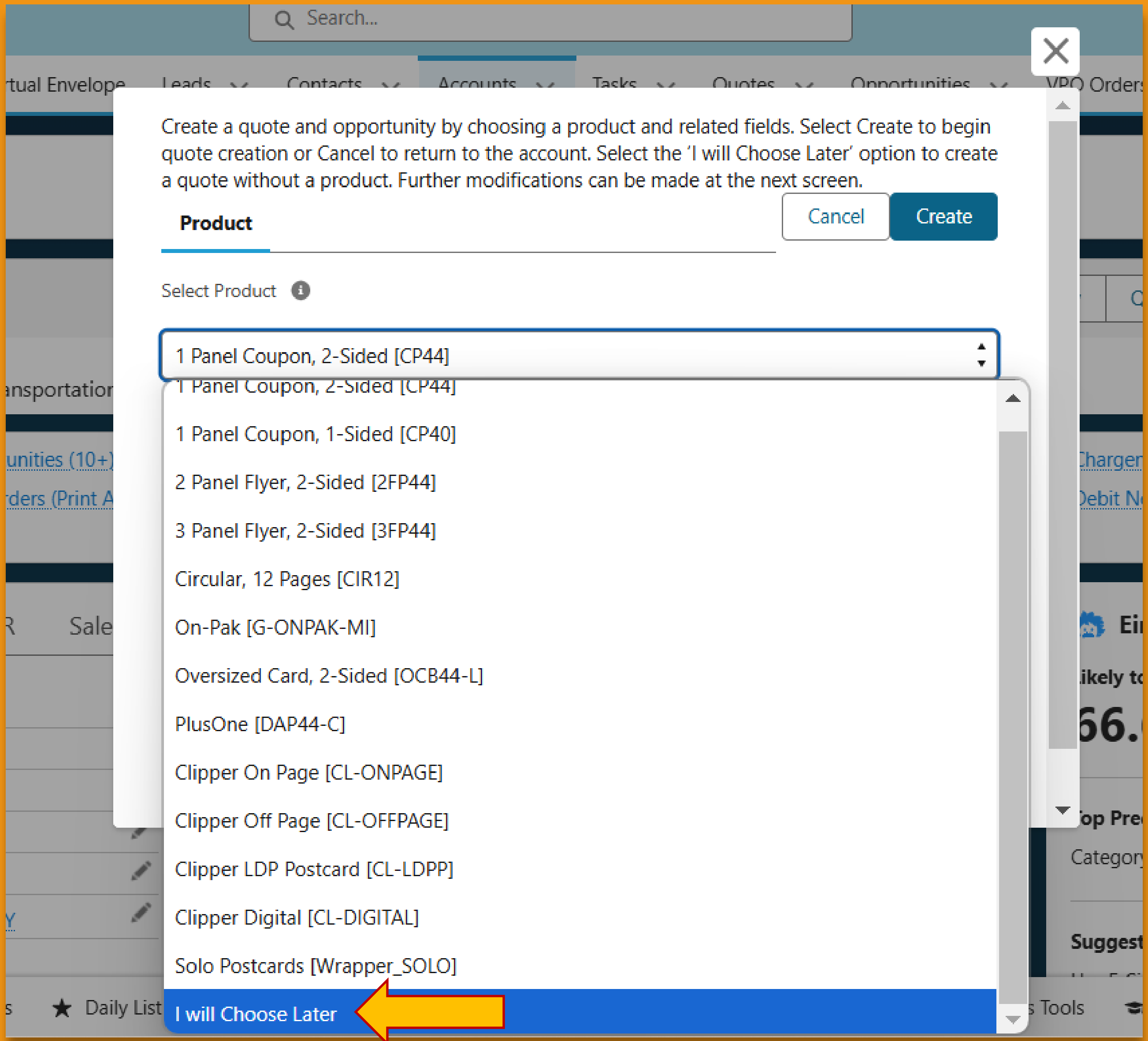
Step 1: Create Quick Quote

From the Account record, select Quick Quote in the upper right.

Step 2: Select Product

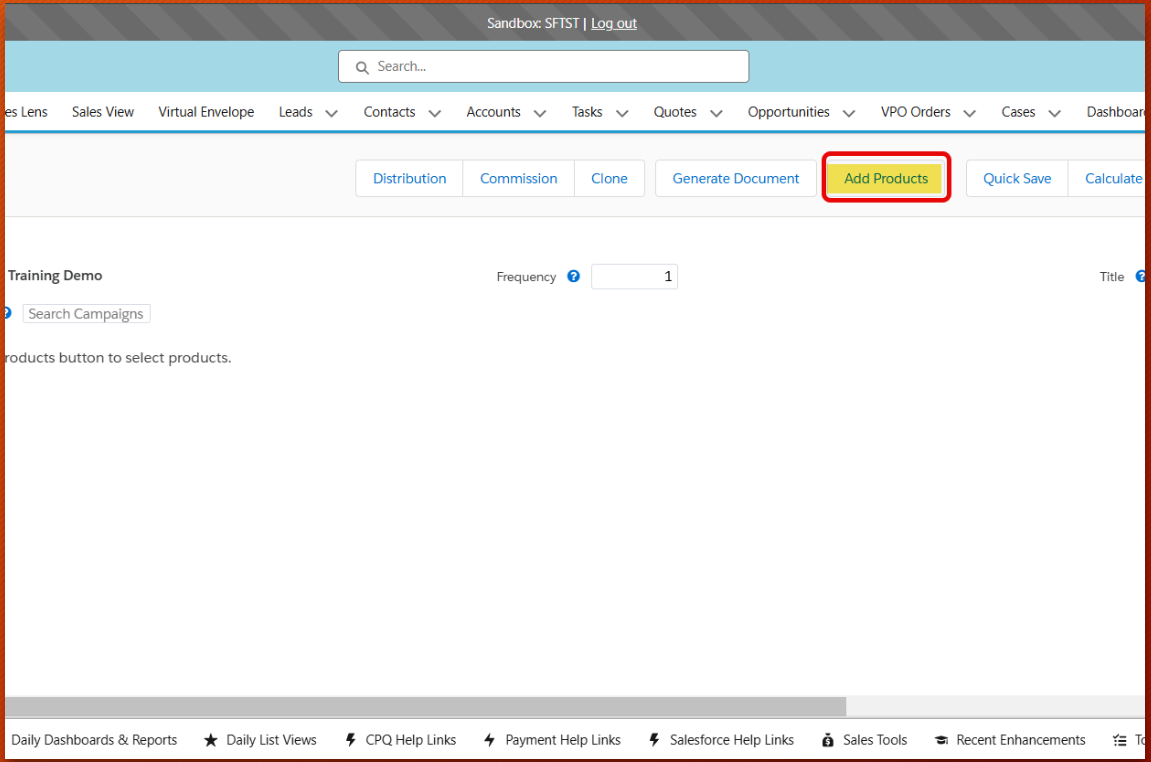
Select the option

“I will Choose Later” from the bottom of the drop-down menu.



Step 3: Add Products

Click the “Add Products” button

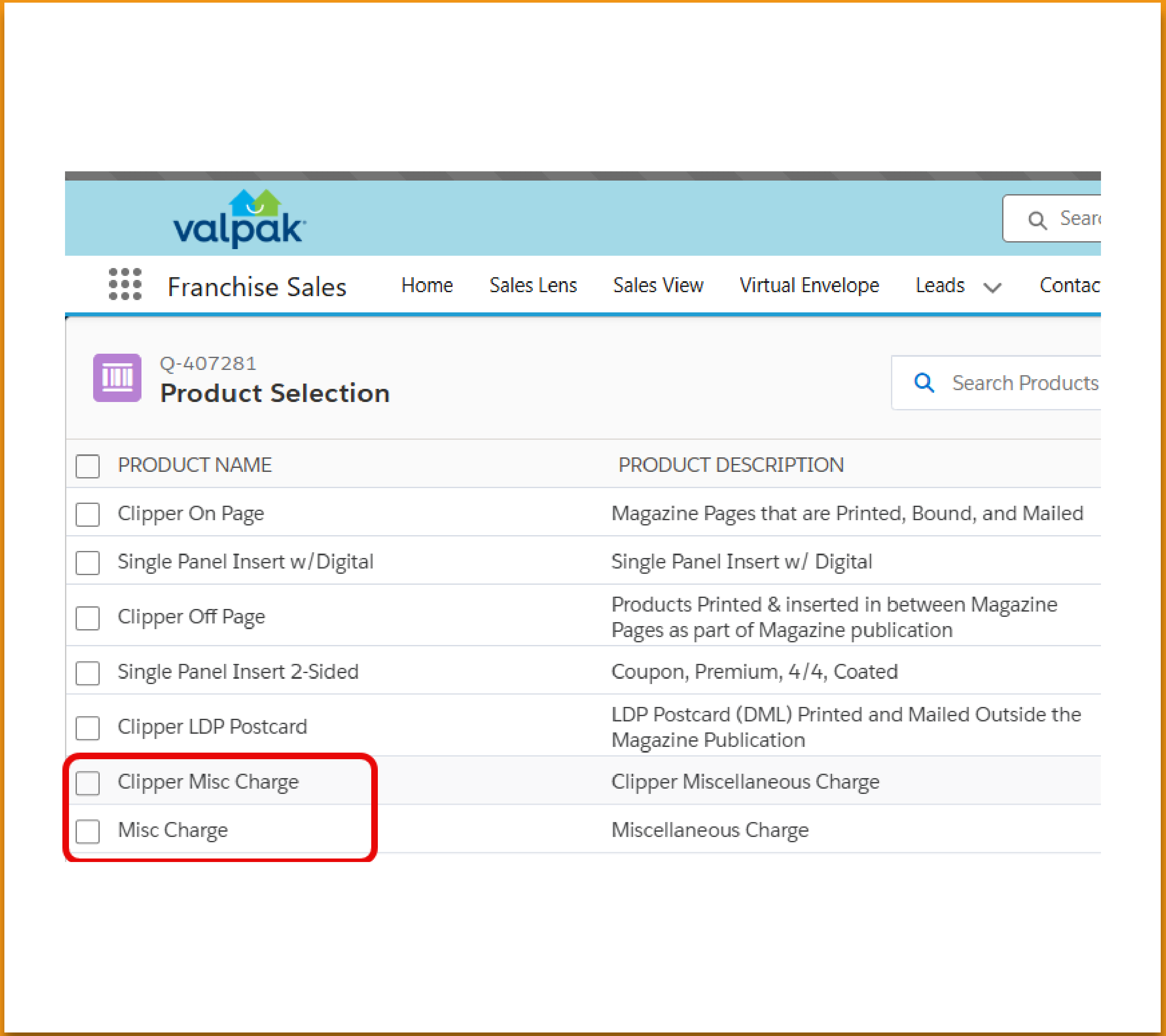


Step 4: Select Misc Charge

Select the appropriate Misc Charge option:

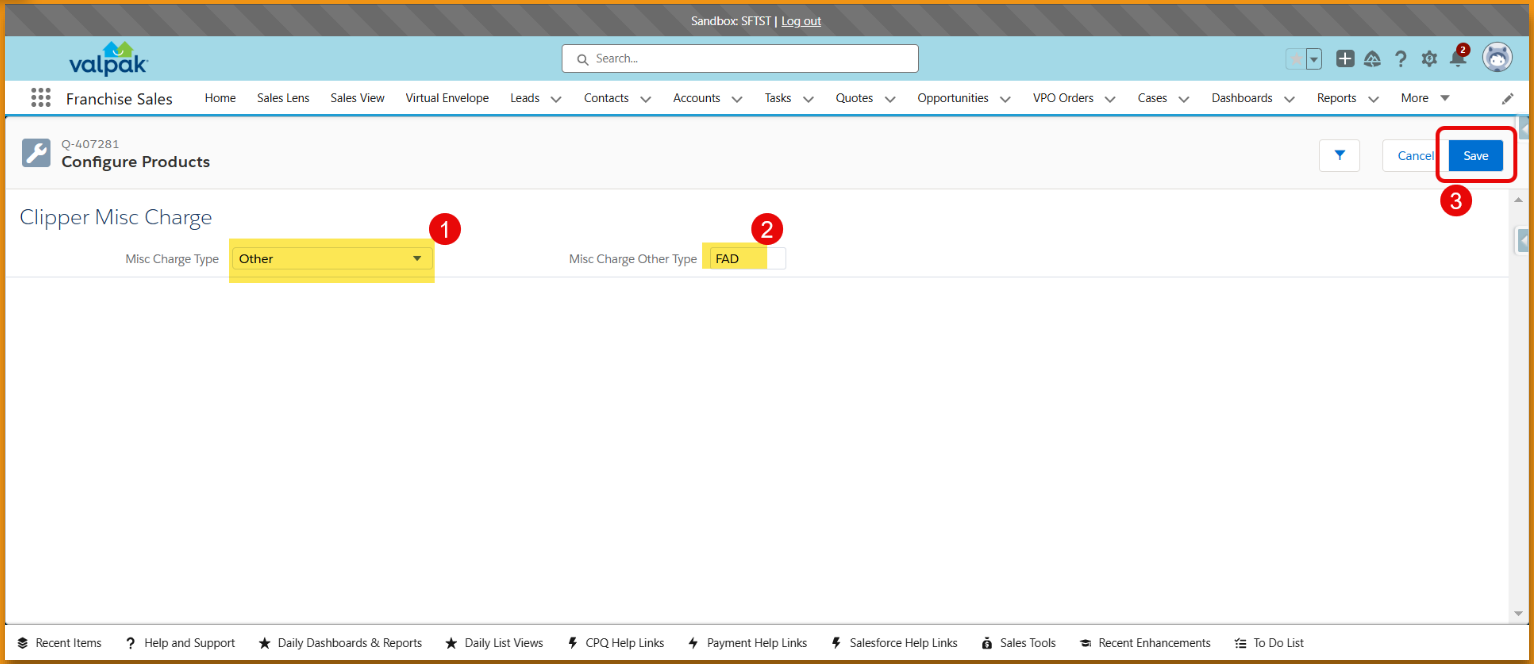
- Clipper Misc Charge – Clipp only or combined Markets
- Misc Charge – Valpak only or combined Markets

Once you have selected the charge type, click on "Select" in the upper right



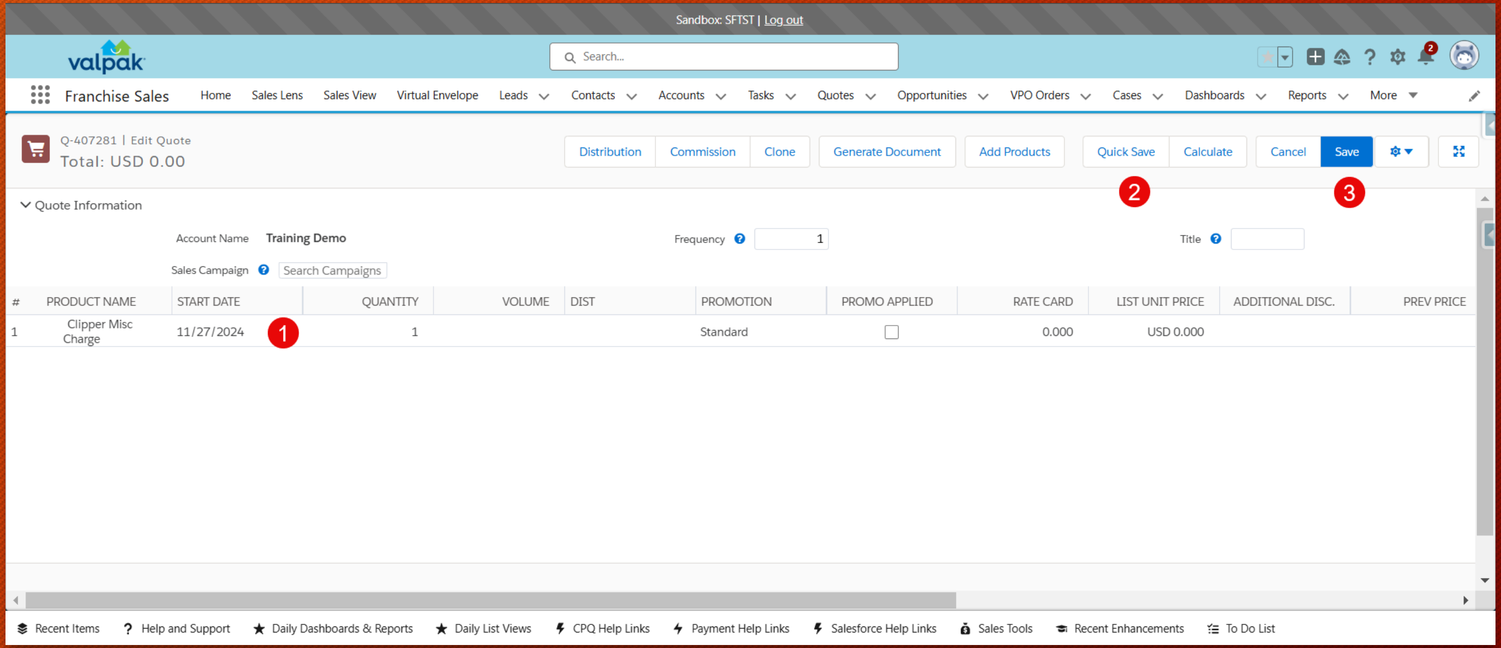
Step 5: Enter Misc Charge information

1. Select "Other" from the drop down list for the Misc Charge Type
2. Enter "FAD" into the Misc Charge Other Type box
3. Click on "Save"



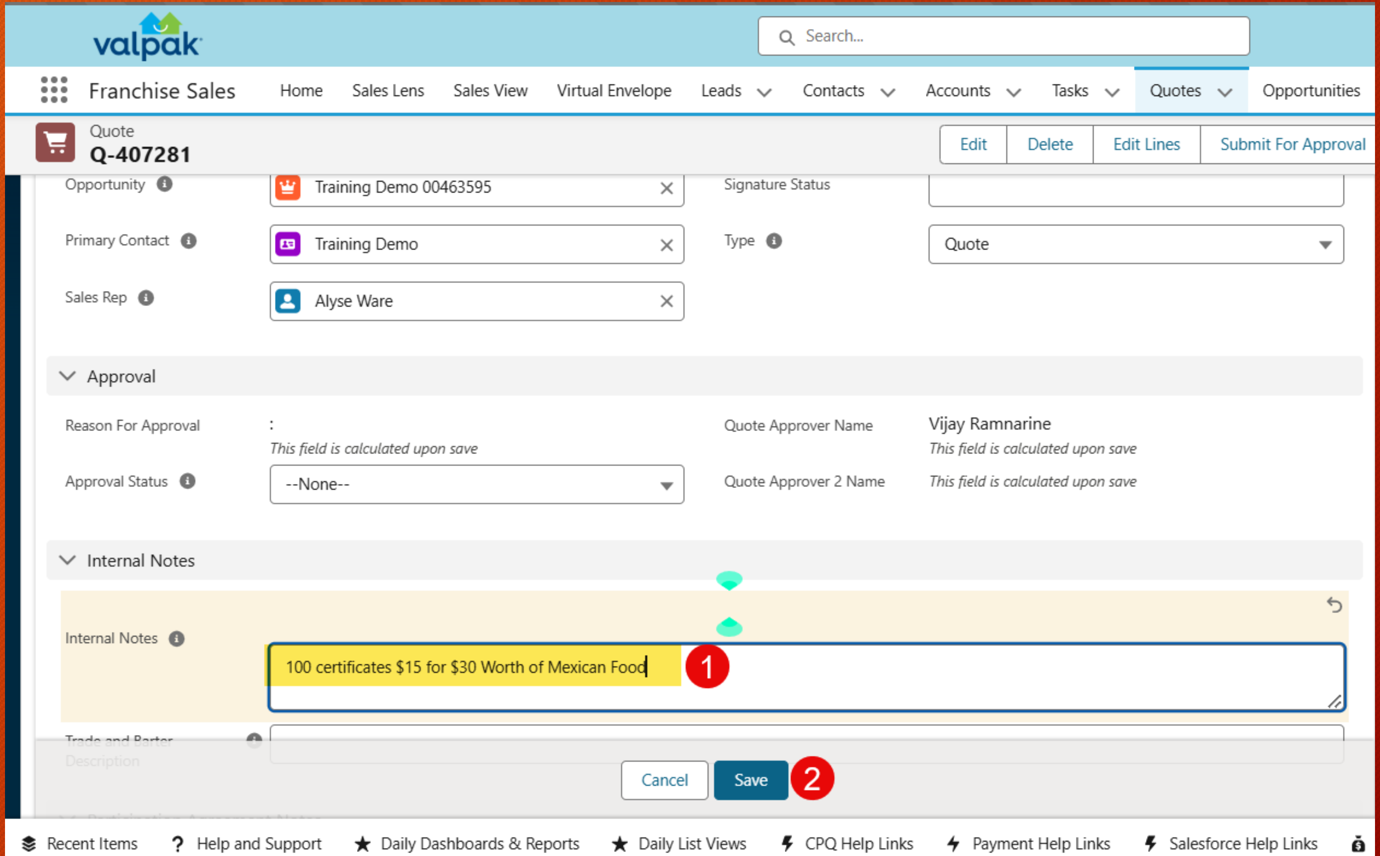
Step 6: Quick Save and Save

1. If needed, you can adjust the desired start date.
2. “Quick Save”
3. “Save”



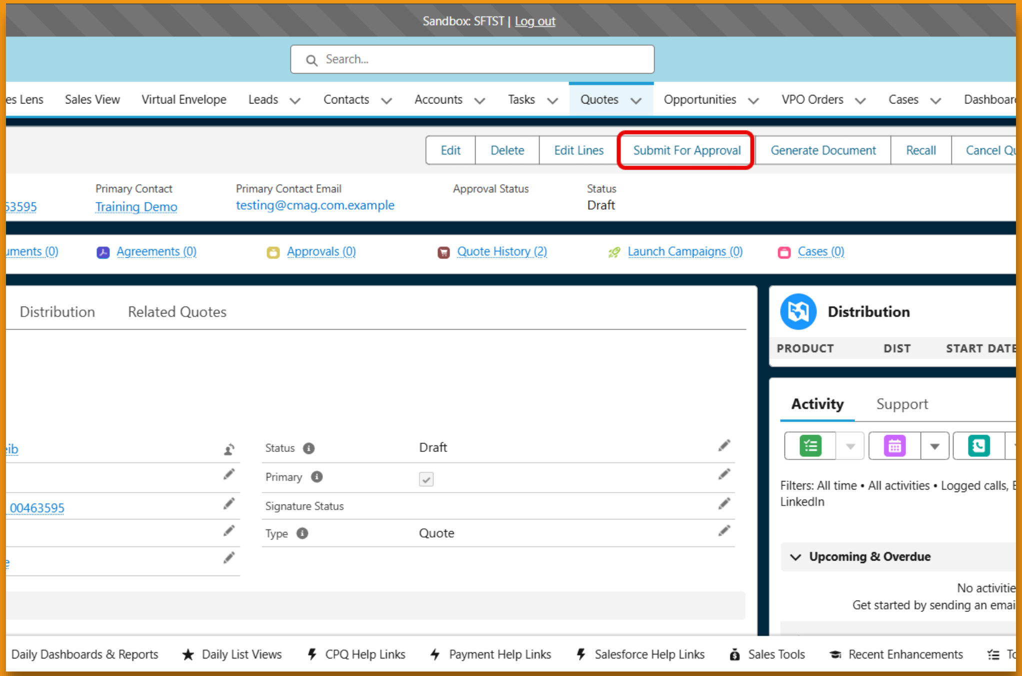
Step 7: Add Internal Notes

1. On the Quote you created, enter the:
   - Amount of certificates to be sold
   - Deal price
   - Description
2. “Save”



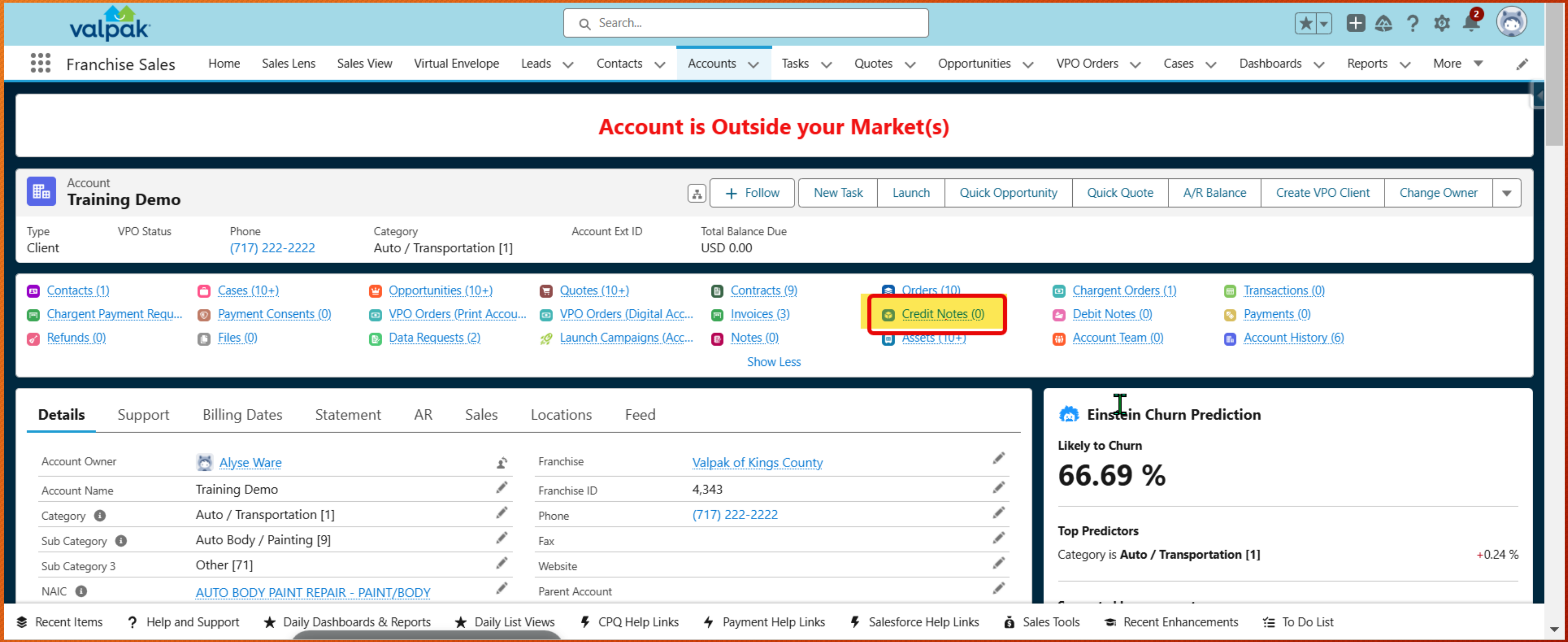
Step 8: Submit for Approval and Signature

Submit for Approval and follow the normal process for getting your clients' signature



FAD Credits

Monitor the credits that your client is accruing to see how much money they have “banked” to use towards their print products

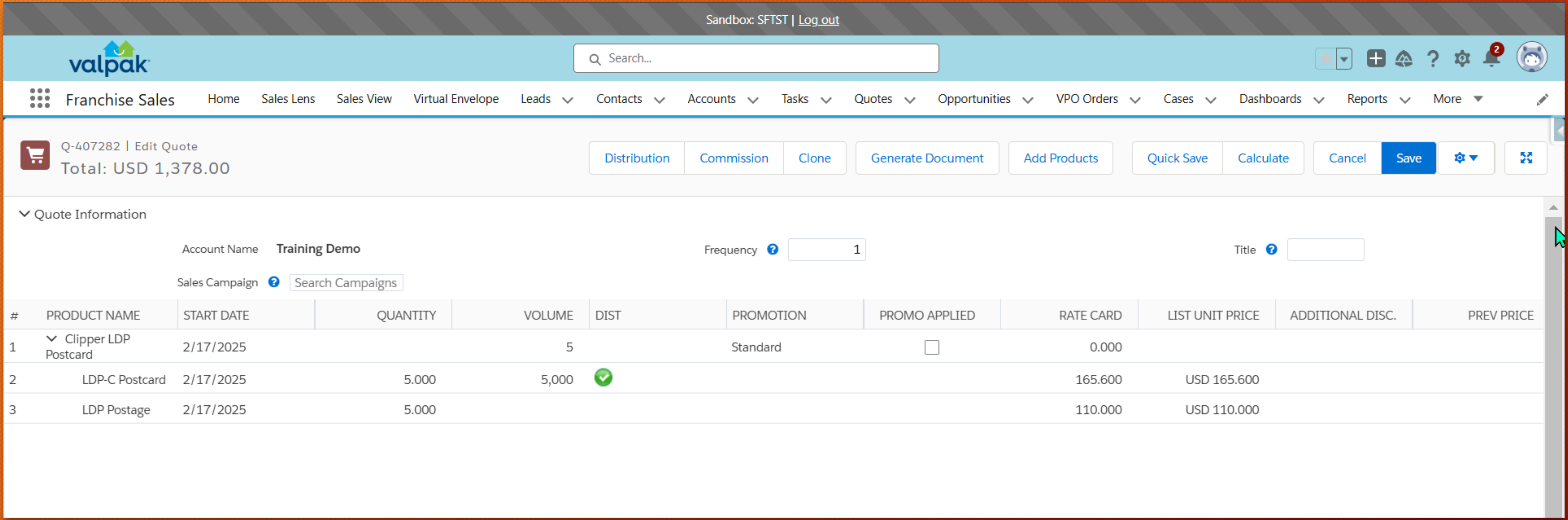


Step 1: Credit Notes

On the Account record, select “Credit Notes” to view the credits that have been accrued thus far

Entering the Print Component

Once your client has accrued credits, you can use this toward their print piece(s)



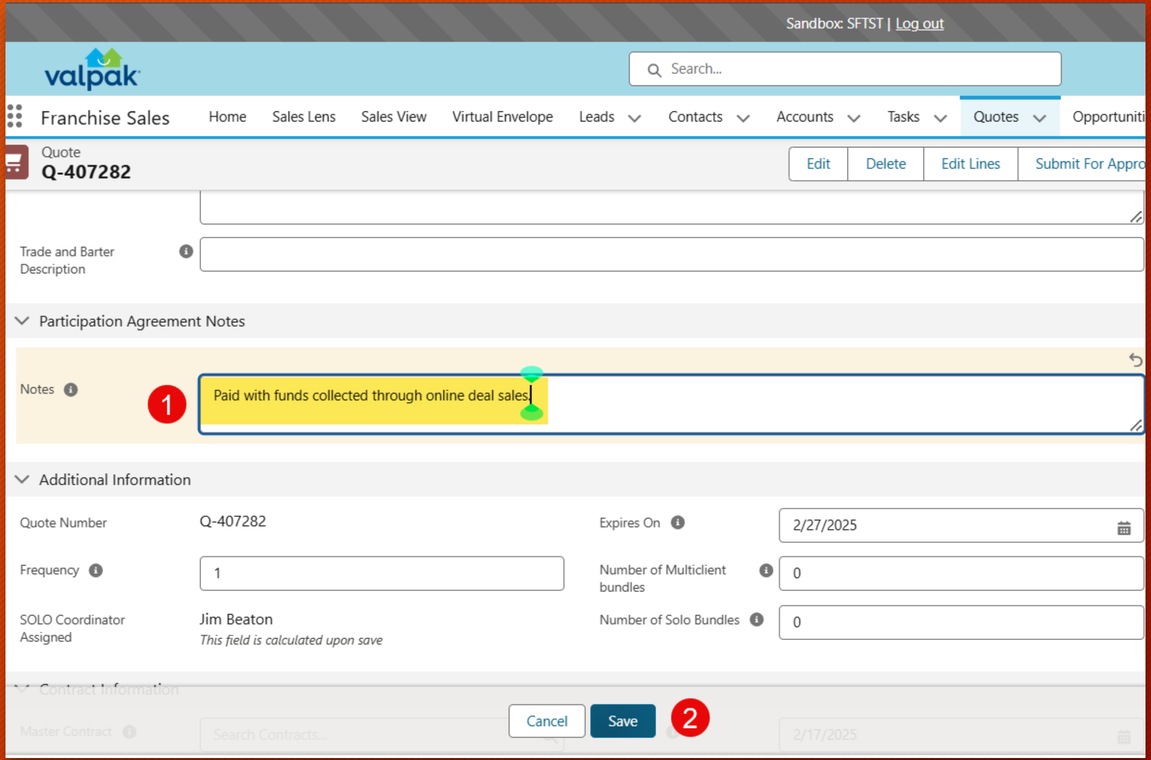
Step 1: Create your Quick Quote

Follow the normal steps of entering your Quick Quote for the desired print piece.

Discounts are NOT allowed under this process.

Step 2: Participant Agreement Notes

We suggest adding a Participant Agreement Note to indicate the print piece is being paid with funds collected through online deal sales.



Participant Agreement

If you added a note to the Participant Agreement, it will show up for the customer to view.

PARTICIPATION AGREEMENT

valpak

clipp

Valpak of Kings County
1 Valpak Ave North
SAINT PETERSBURG, FL
33716
Office:
001-784-286-3178x02874

Agreement # Q-407282-1
Start Date 02/17/2025
Sales Contact Alyse Ware
alyse_ware@valpak.com.invalid
Client #

Business Name Training Demo
Address 23 East 10th Street
City New York
State/ZIP NY , 10003
Telephone (717) 222-2222

Contact Training Demo
Title
Email testing@cmag.com.example
Cell

DRAFT

Date	Product	Quantity	Sub Total	Est.Tax	Total
02/17/2025	Clipper LDP Postcard • PA-Lancaster (2/19/2025): LC2 – LDP-C Postcard – LDP Postage	 5,000 5	$1,378.00	$0.00	$1,378.00

SUBTOTAL:	$1,378.00
ESTIMATED TAX:	$0.00
TOTAL:	$1,378.00

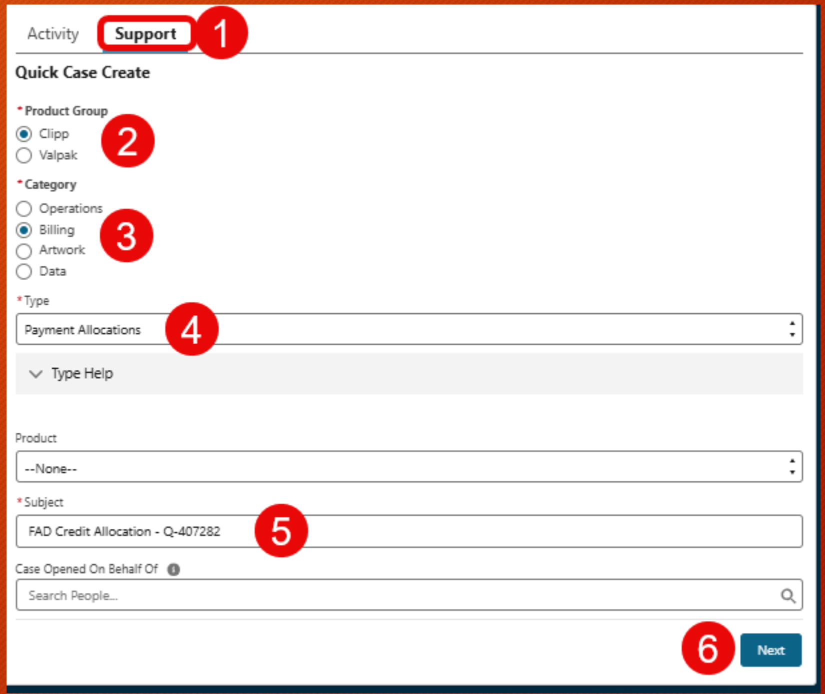
Tax is an estimate, final tax may vary.

Notes: Paid with funds collected through online deal sales.

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

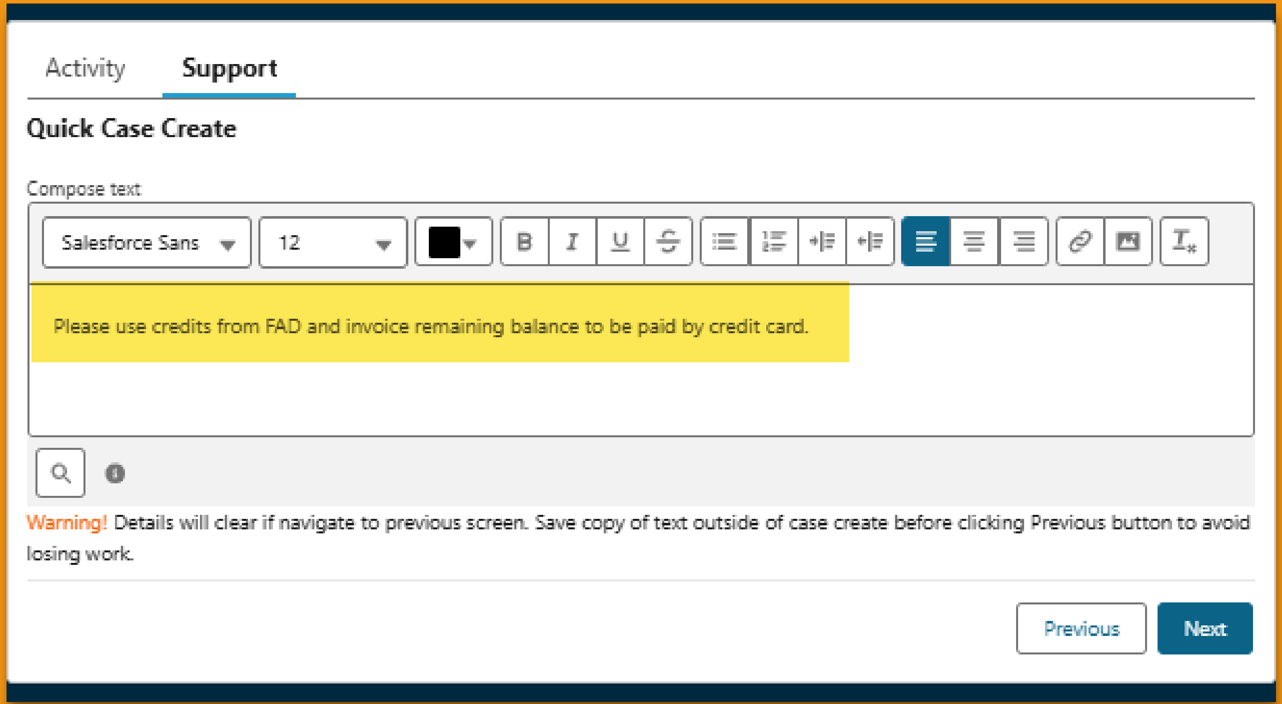
Step 3: Create a Support Case

1. From the Quote or Account record, create a Support Case
2. Select the appropriate product group
3. Choose "Billing"
4. For the Type, enter "Payment Allocations"
5. In the Subject, add details including the Quote number
6. Click "Next"



Step 3 (continued)

In the text section, provide any additional information including payment information if there are not enough FAD credits to pay the entire balance of the print piece.



Questions or need help?

Create a Support Case for CCO

or email FAST@Valpak.com