

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.

The screenshot displays the Valpak CRM interface. At the top, there is a search bar and navigation icons. The main navigation menu includes Franchise Sales, Home, Sales Lens, Sales View, Virtual Envelope, Leads, Contacts, Accounts, Tasks, Quotes, Opportunities, VPO Orders, Cases, Dashboards, Reports, and More. The 'Accounts' menu is selected, showing a message: "Account is Outside your Market(s)".

The account details for "Training Demo" are shown below. The account type is "Client", VPO Status is "VPO Status", and Phone is "(717) 222-2222". The category is "Auto / Transportation [1]" and the total balance due is "USD 0.00". A "Quick Quote" button is highlighted with a red box in the upper right corner of the account record.

Below the account details, there is a section for "Einstein Churn Prediction" which shows a "Likely to Churn" rate of 66.69%.

Type	VPO Status	Phone	Category	Account Ext ID	Total Balance Due	Quick Quote
Client	VPO Status	(717) 222-2222	Auto / Transportation [1]		USD 0.00	Quick Quote

Additional account information includes:

- Account Owner: Alyse Ware
- Account Name: Training Demo
- Franchise: Valpak of Kings County
- Franchise ID: 4,343
- Phone: (717) 222-2222

Other account details include: Contacts (1), Cases (10+), Opportunities (10+), Quotes (10+), Contracts (9), Orders (10), Chargent Orders (1), Transactions (0), Chargent Payment Requ..., Payment Consents (0), VPO Orders (Print Accou..., VPO Orders (Digital Acc..., Invoices (3), Credit Notes (0), Debit Notes (0), and Payments (0). A "Show All (24)" link is also present.

Step 1: Create Quick Quote

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

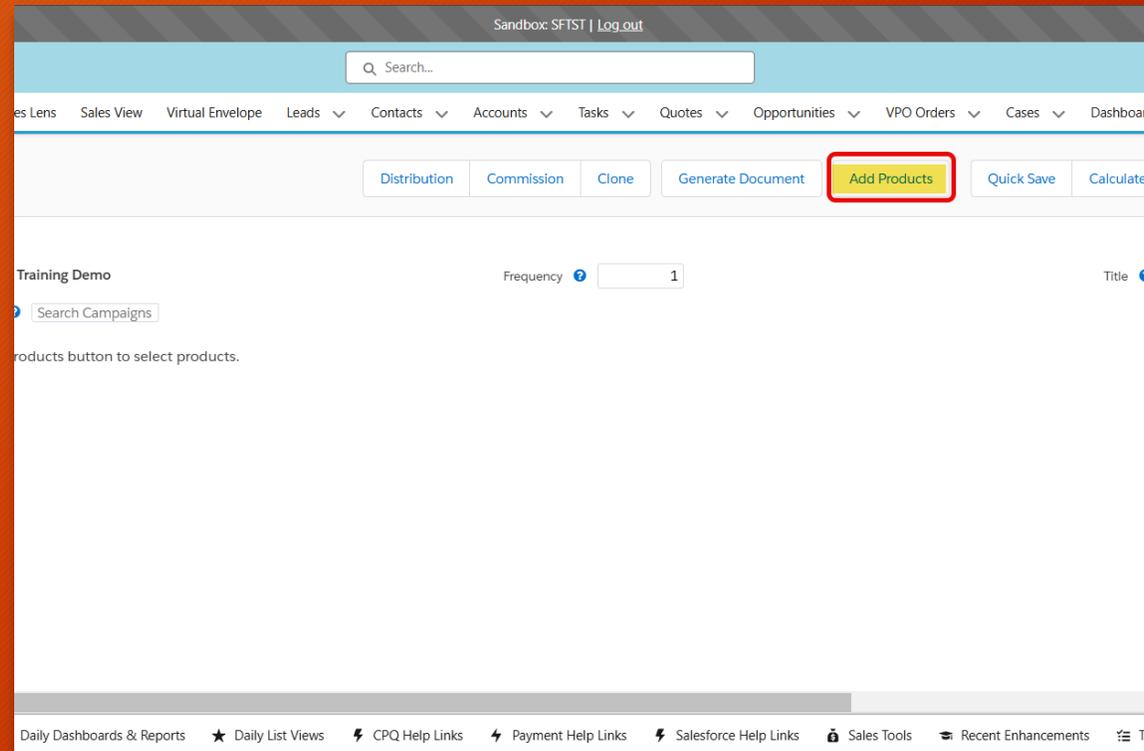
Step 2: Select Product

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

The screenshot shows a software interface with a search bar at the top. Below it, there are tabs for 'Leads', 'Contacts', 'Accounts', 'Tasks', 'Quotes', 'Opportunities', and 'Orders'. A modal window is open, titled 'Product', with 'Cancel' and 'Create' buttons. The modal contains the text: 'Create a quote and opportunity by choosing a product and related fields. Select Create to begin quote creation or Cancel to return to the account. Select the 'I will Choose Later' option to create a quote without a product. Further modifications can be made at the next screen.' Below this text is a 'Select Product' label and a dropdown menu. The dropdown menu is open, showing a list of product options: '1 Panel Coupon, 2-Sided [CP44]', '1 Panel Coupon, 1-Sided [CP40]', '2 Panel Flyer, 2-Sided [2FP44]', '3 Panel Flyer, 2-Sided [3FP44]', 'Circular, 12 Pages [CIR12]', 'On-Pak [G-ONPAK-MI]', 'Oversized Card, 2-Sided [OCB44-L]', 'PlusOne [DAP44-C]', 'Clipper On Page [CL-ONPAGE]', 'Clipper Off Page [CL-OFFPAGE]', 'Clipper LDP Postcard [CL-LDPPP]', 'Clipper Digital [CL-DIGITAL]', and 'Solo Postcards [Wrapper_SOLO]'. At the bottom of the dropdown menu, the option 'I will Choose Later' is highlighted in blue, and a yellow arrow points to it from the left.

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

The screenshot shows the Valpak Product Selection interface. At the top, there is a navigation bar with the Valpak logo and a search bar. Below the navigation bar, there is a header section with a grid icon, the text "Franchise Sales", and several menu items: "Home", "Sales Lens", "Sales View", "Virtual Envelope", "Leads", and "Contact".

The main content area is titled "Q-407281 Product Selection" and includes a search bar labeled "Search Products". Below this is a table with two columns: "PRODUCT NAME" and "PRODUCT DESCRIPTION".

PRODUCT NAME	PRODUCT DESCRIPTION
<input type="checkbox"/> Clipper On Page	Magazine Pages that are Printed, Bound, and Mailed
<input type="checkbox"/> Single Panel Insert w/Digital	Single Panel Insert w/ Digital
<input type="checkbox"/> Clipper Off Page	Products Printed & inserted in between Magazine Pages as part of Magazine publication
<input type="checkbox"/> Single Panel Insert 2-Sided	Coupon, Premium, 4/4, Coated
<input type="checkbox"/> Clipper LDP Postcard	LDP Postcard (DML) Printed and Mailed Outside the Magazine Publication
<input type="checkbox"/> Clipper Misc Charge	Clipper Miscellaneous Charge
<input type="checkbox"/> Misc Charge	Miscellaneous Charge

The "Clipper Misc Charge" row is highlighted with a red rectangular box.

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”

The screenshot displays the Valpak 'Configure Products' interface for 'Clipper Misc Charge'. The page includes a top navigation bar with the Valpak logo, a search bar, and various menu items like 'Franchise Sales', 'Home', 'Sales Lens', 'Sales View', 'Virtual Envelope', 'Leads', 'Contacts', 'Accounts', 'Tasks', 'Quotes', 'Opportunities', 'VPO Orders', 'Cases', 'Dashboards', 'Reports', and 'More'. Below the navigation, the product ID 'Q-407281' and the title 'Configure Products' are visible. The main form area contains two fields: 'Misc Charge Type' with a dropdown menu set to 'Other' (annotated with a red circle '1'), and 'Misc Charge Other Type' with a text input field containing 'FAD' (annotated with a red circle '2'). A 'Save' button is highlighted with a red box and a red circle '3'. The bottom of the page features a footer with links for 'Recent Items', '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'.

Step 6: Quick Save and Save

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

The screenshot displays the Valpak CRM interface for editing a quote. The top navigation bar includes the Valpak logo, a search bar, and various menu items like Franchise Sales, Home, Sales Lens, Sales View, Virtual Envelope, Leads, Contacts, Accounts, Tasks, Quotes, Opportunities, VPO Orders, Cases, Dashboards, Reports, and More. The main content area shows the quote details for 'Q-407281 | Edit Quote' with a total of USD 0.00. A toolbar contains buttons for Distribution, Commission, Clone, Generate Document, Add Products, Quick Save, Calculate, Cancel, and Save. The 'Quote Information' section includes fields for Account Name (Training Demo), Frequency (1), and Title. Below this is a table with columns for #, PRODUCT NAME, START DATE, QUANTITY, VOLUME, DIST, PROMOTION, PROMO APPLIED, RATE CARD, LIST UNIT PRICE, ADDITIONAL DISC., and PREV PRICE. The table contains one row with the following data: # 1, PRODUCT NAME Clipper Misc Charge, START DATE 11/27/2024, QUANTITY 1, VOLUME, DIST, PROMOTION Standard, PROMO APPLIED (checkbox), RATE CARD 0.000, LIST UNIT PRICE USD 0.000, ADDITIONAL DISC., and PREV PRICE. Red circles with numbers 1, 2, and 3 are overlaid on the interface: circle 1 is on the START DATE field, circle 2 is on the Quick Save button, and circle 3 is on the Save button. The bottom of the screen shows a footer with links for Recent Items, 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.

#	PRODUCT NAME	START DATE	QUANTITY	VOLUME	DIST	PROMOTION	PROMO APPLIED	RATE CARD	LIST UNIT PRICE	ADDITIONAL DISC.	PREV PRICE
1	Clipper Misc Charge	11/27/2024	1			Standard	<input type="checkbox"/>	0.000	USD 0.000		

Step 7: Add Internal Notes

1. On the Quote you created, enter the:

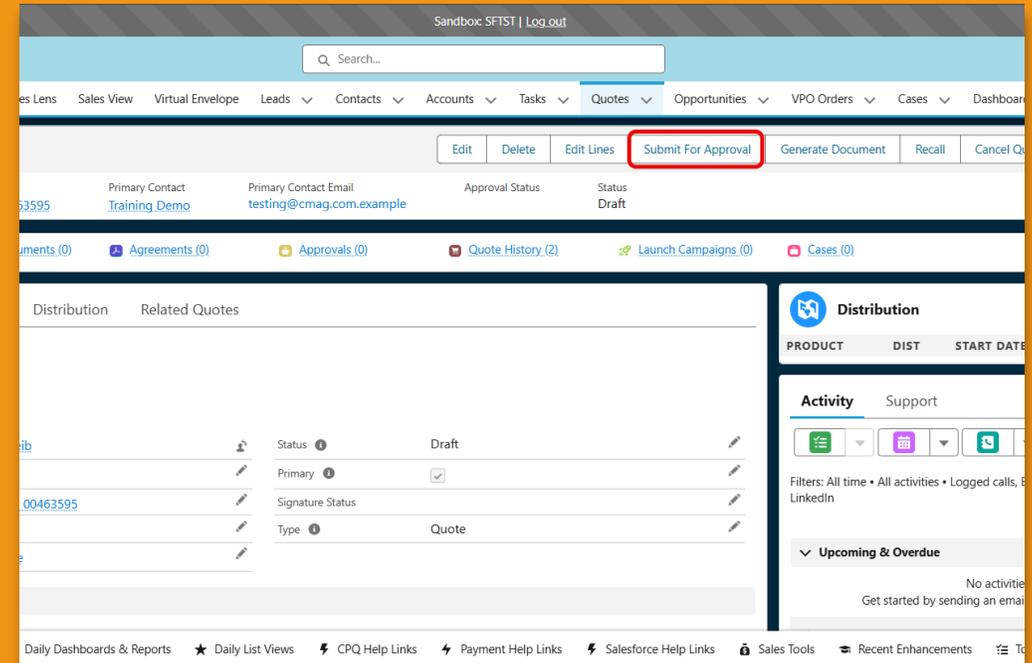
- Amount of certificates to be sold
- Deal price
- Description

2. “Save”

The screenshot displays the Valpak CRM interface for a Quote (Q-407281). The form includes fields for Opportunity (Training Demo 00463595), Primary Contact (Training Demo), Sales Rep (Alyse Ware), Signature Status, and Type (Quote). The Approval section shows Reason For Approval, Approval Status (set to --None--), Quote Approver Name (Vijay Ramnarine), and Quote Approver 2 Name. The Internal Notes section is highlighted, showing a text input field containing "100 certificates \$15 for \$30 Worth of Mexican Food" with a red circle '1' next to it. Below the notes field are "Cancel" and "Save" buttons, with a red circle '2' next to the "Save" button. The footer contains navigation links for Recent Items, Help and Support, Daily Dashboards & Reports, Daily List Views, CPQ Help Links, Payment Help Links, and Salesforce Help Links.

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

The screenshot displays the Valpak CRM interface for an account named "Training Demo". At the top, a navigation bar includes "Franchise Sales" and various menu items like "Home", "Sales Lens", "Sales View", "Virtual Envelope", "Leads", "Contacts", "Accounts", "Tasks", "Quotes", "Opportunities", "VPO Orders", "Cases", "Dashboards", "Reports", and "More". A search bar is located in the top right. Below the navigation, a prominent red message states "Account is Outside your Market(s)".

The account details section shows:

- Account: Training Demo
- Type: Client
- VPO Status: (blank)
- Phone: (717) 222-2222
- Category: Auto / Transportation [1]
- Account Ext ID: (blank)
- Total Balance Due: USD 0.00

A grid of activity links is displayed, with "Credit Notes (0)" highlighted in a yellow box. Other links include Contacts (1), Cases (10+), Opportunities (10+), Quotes (10+), Contracts (9), Orders (10), Chargent Orders (1), Transactions (0), Chargent Payment Requ... (0), Payment Consents (0), VPO Orders (Print Accou...), VPO Orders (Digital Acc...), Invoices (3), Debit Notes (0), Payments (0), Refunds (0), Files (0), Data Requests (2), Launch Campaigns (Acc...), Notes (0), Assets (10+), Account Team (0), and Account History (6). A "Show Less" link is also present.

The "Details" tab is active, showing account information:

Account Owner	Alyse Ware	Franchise	Valpak of Kings County
Account Name	Training Demo	Franchise ID	4,343
Category	Auto / Transportation [1]	Phone	(717) 222-2222
Sub Category	Auto Body / Painting [9]	Fax	
Sub Category 3	Other [71]	Website	
NAIC	AUTO BODY PAINT REPAIR - PAINT/BODY	Parent Account	

On the right, the "Einstein Churn Prediction" widget shows a "Likely to Churn" rate of 66.69%. The "Top Predictors" section indicates that the "Category is Auto / Transportation [1]" is a predictor with a +0.24% impact.

The bottom navigation bar includes links for "Recent Items", "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".

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)

Sandbox: SFTST | [Log out](#)

valpak

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

Q-407282 | Edit Quote
Total: USD 1,378.00

Distribution Commission Clone Generate Document Add Products Quick Save Calculate Cancel Save

Quote Information

Account Name **Training Demo** Frequency Title

Sales Campaign

#	PRODUCT NAME	START DATE	QUANTITY	VOLUME	DIST	PROMOTION	PROMO APPLIED	RATE CARD	LIST UNIT PRICE	ADDITIONAL DISC.	PREV PRICE
1	Clipper LDP Postcard	2/17/2025		5		Standard	<input type="checkbox"/>	0.000			
2	LDP-C Postcard	2/17/2025	5.000	5,000	✓			165.600	USD 165.600		
3	LDP Postage	2/17/2025	5.000					110.000	USD 110.000		

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.

Sandbox: SFTST | [Log out](#)

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

Quote Q-407282 Edit Delete Edit Lines Submit For Approval

Trade and Barter Description

Participation Agreement Notes

Notes 1 Paid with funds collected through online deal sales

Additional Information

Quote Number Q-407282 Expires On 2/27/2025

Frequency 1 Number of Multiclient bundles 0

SOLO Coordinator Assigned Jim Beaton This field is calculated upon save Number of Solo Bundles 0

Contract Information

Master Contract Search Contracts... Cancel Save 2 2/17/2025

Participant Agreement

PARTICIPATION AGREEMENT



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 #

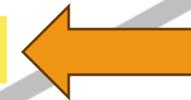
Business Name Training Demo
Address 23 East 10th Street
City New York
State/ZIP NY , 10003
Telephone (717) 222-2222

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

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

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

Step 3: Create a Support Case

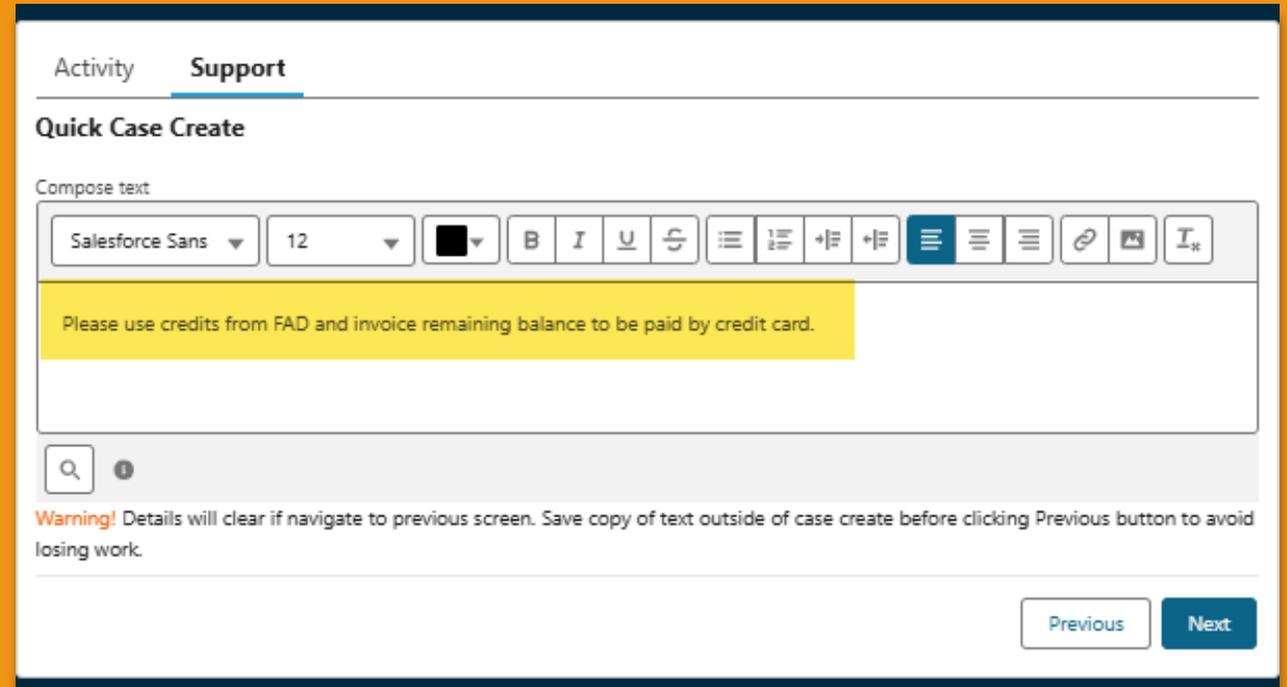
1. From the Quote or Account record, create a Support Case
2. Select the appropriate product group
3. Choose “Billing”
4. For the Type, enter “Payment Allocations”
5. In the Subject, add details including the Quote number
6. Click “Next”

The screenshot shows a 'Quick Case Create' form with the following fields and callouts:

- Activity:** A dropdown menu with 'Support' selected, marked with a red circle and the number 1.
- *Product Group:** Radio buttons for 'Clipp' (selected) and 'Valpak', marked with a red circle and the number 2.
- *Category:** Radio buttons for 'Operations', 'Billing' (selected), 'Artwork', and 'Data', marked with a red circle and the number 3.
- *Type:** A dropdown menu with 'Payment Allocations' selected, marked with a red circle and the number 4.
- Product:** A dropdown menu with '--None--' selected.
- *Subject:** A text input field containing 'FAD Credit Allocation - Q-407282', marked with a red circle and the number 5.
- Case Opened On Behalf Of:** A search field with the placeholder text 'Search People...' and a magnifying glass icon.
- Next:** A blue button with the text 'Next', marked with a red circle and the number 6.

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.



The screenshot shows a Salesforce interface for creating a case. At the top, there are tabs for 'Activity' and 'Support', with 'Support' selected. Below the tabs is the 'Quick Case Create' section. A 'Compose text' field is visible, containing a text editor with a toolbar. The toolbar includes options for font (Salesforce Sans), size (12), background color (black), bold (B), italic (I), underline (U), strikethrough, bulleted list, numbered list, indent, and outdent. The text 'Please use credits from FAD and invoice remaining balance to be paid by credit card.' is entered and highlighted in yellow. Below the text editor is a search icon and an information icon. A warning message reads: '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.' At the bottom right, there are 'Previous' and 'Next' buttons.

Questions or
need help?

Create a Support
Case for CCO



or email
FAST@Valpak.com