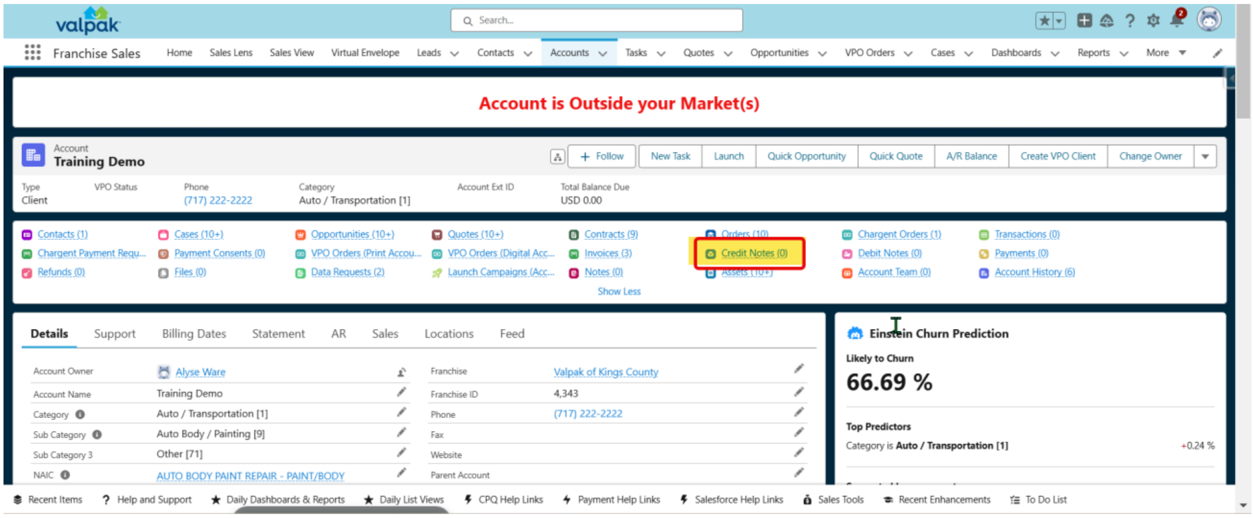
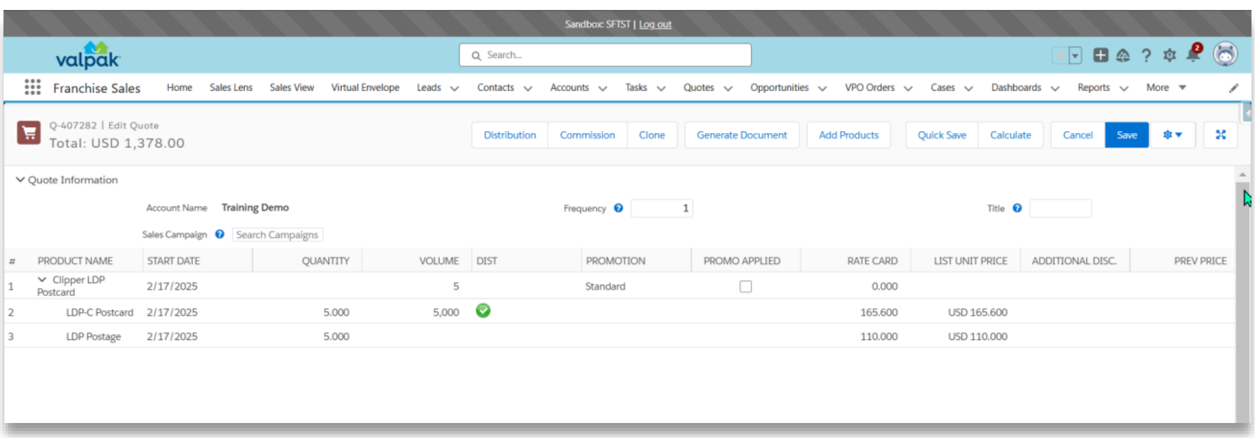
How to Monitor Future Ad (FAD) Credits

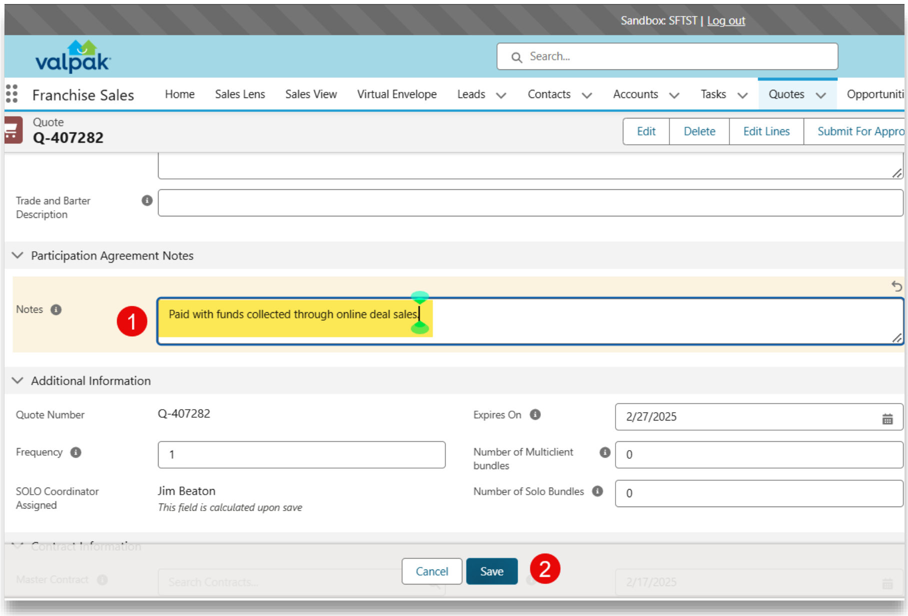
1. From the account record, click Credit Notes to view accrued credits



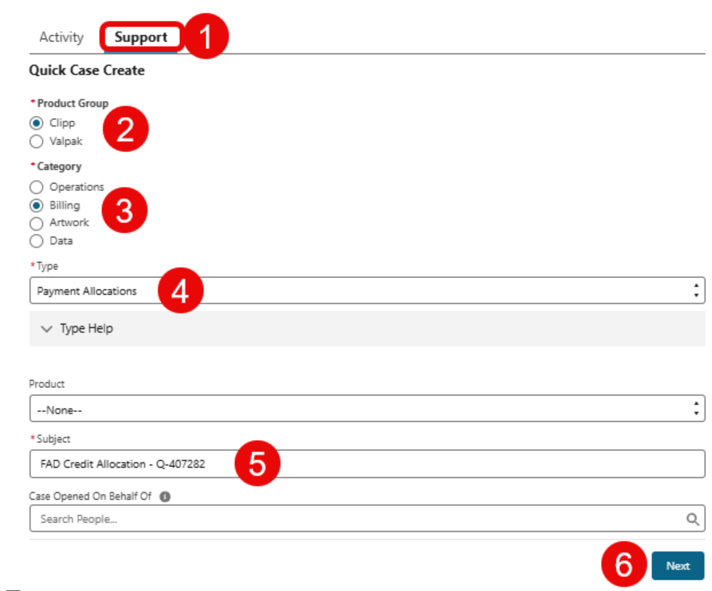
2. Create a Quick Quote (standard process) to apply credits to a future print piece
   a. Discounts are not allowed when using accrued credits



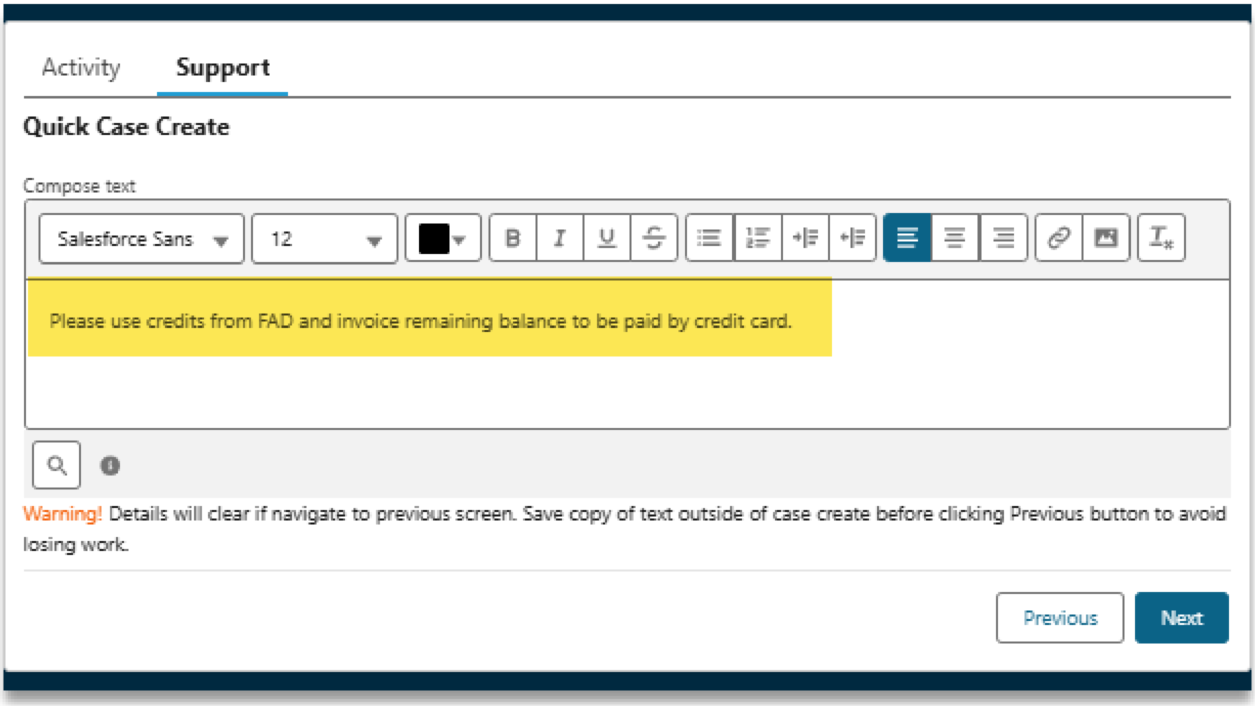
3. In the Notes section of the Participant Agreement, indicate that the print piece is being paid with funds collected through online deal sales
    a. This will be visible to your client on the agreement



4. From the Quote or Account record, create a Support Case:
    a. Select the appropriate Product Group
    b. Choose Billing
    c. For the Type, enter Payment Allocations
    d. In the Subject, add details including the Quote number
    e. Click Next

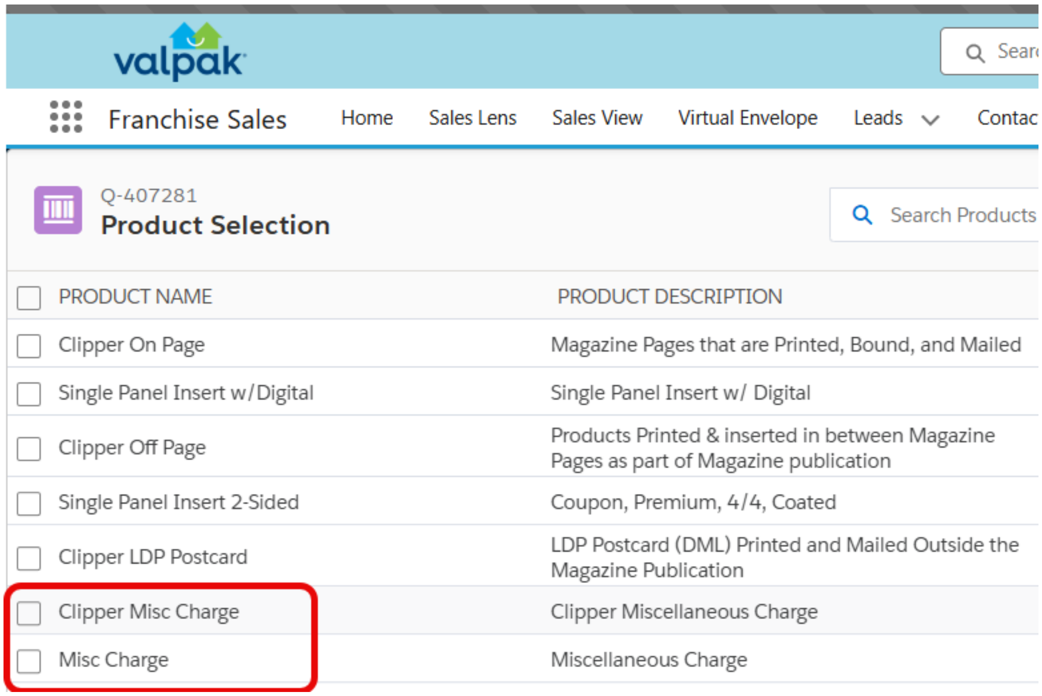


5. In the text section, provide any additional information, including payment information if there are not enough FAD credits to pay the entire balance of the print piece

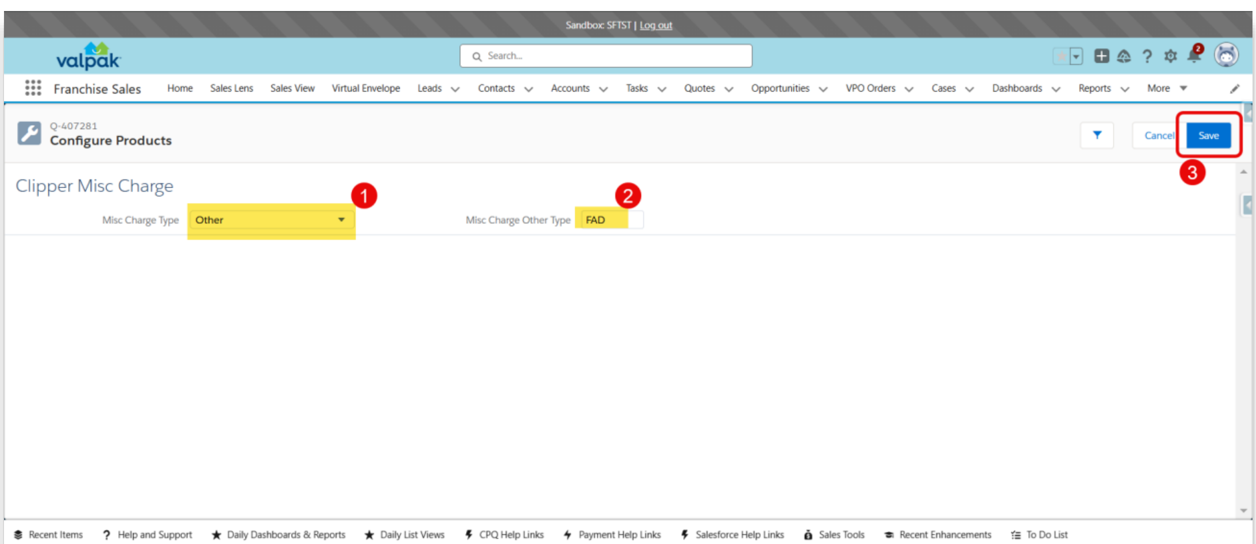


6. Check the correct Misc Charge option, then click Select:
    a. Clipper Misc Charge – Clipp only or combined Markets
    b. Misc Charge – Valpak only or combined Markets

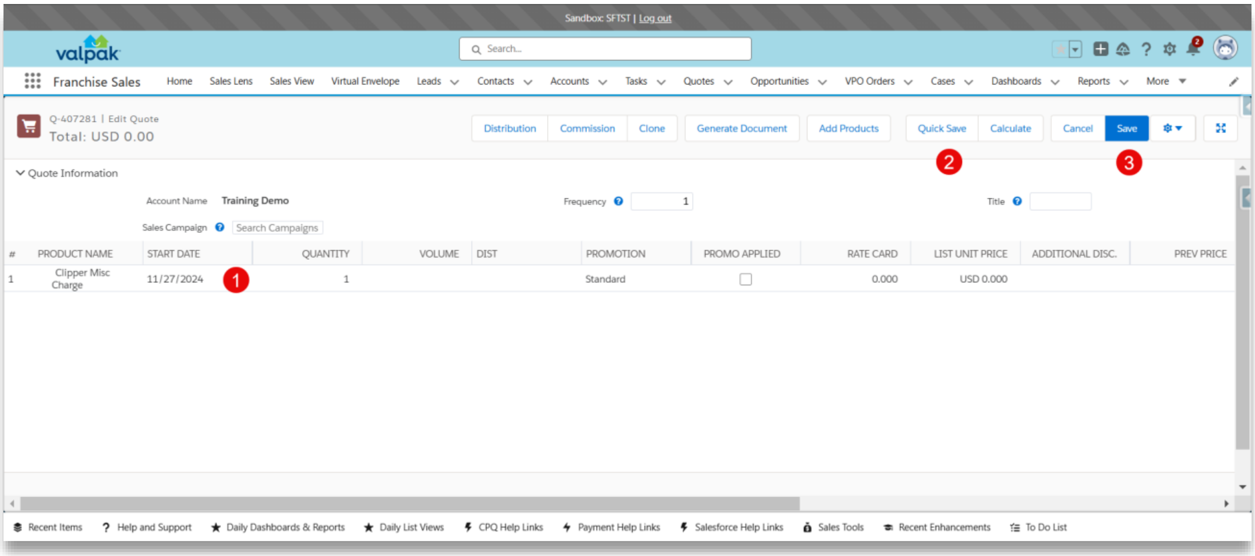
Have questions or need help? Create a Support Case for CCO or email fast@valpak.com.



7. Select “Other” from the drop-down, type “FAD” in the text box, click Save



8. Adjust START DATE if needed, click Quick Save, then click Save start date


Sandbox: SFTST | Log out
valpak
Search...
Franchise Sales
Home
Sales Lens
Sales View
Virtual Envelope
Leads
Contacts
Accounts
Tasks
Quotes
Opportunities
VPO Orders
Cases
Dashboards
Reports
More
Q-407281 | Edit Quote
Total: USD 0.00
Distribution
Commission
Clone
Generate Document
Add Products
Quick Save
Calculate
Cancel
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Account Name
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Sales Campaign
Search Campaigns
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PRODUCT NAME
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VOLUME
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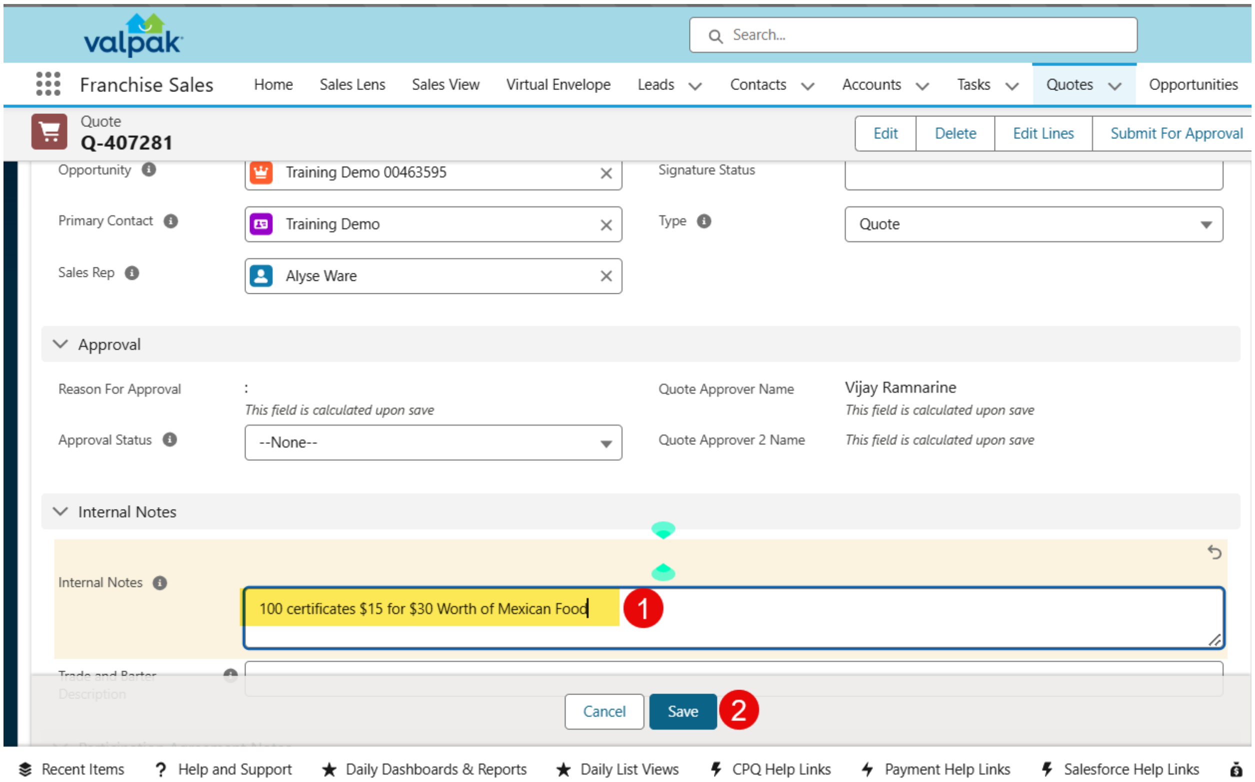
PROMOTION
PROMO APPLIED
RATE CARD
LIST UNIT PRICE
ADDITIONAL DISC.
PREV PRICE
1
Clipper Misc Charge
11/27/2024
1
Standard
0.000
USD 0.000
1
2
3
Recent Items
Help and Support
Daily Dashboards & Reports
Daily List Views
CPQ Help Links
Payment Help Links
Salesforce Help Links
Sales Tools
Recent Enhancements
To Do List

9. Add Internal Notes (# of certificates sold, deal price, description), then click Save



10. Click Submit For Approval