

How to Monitor Future Ad (FAD) Credits

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

The screenshot shows the Valpak account record for 'Training Demo'. At the top, a red banner reads 'Account is Outside your Market(s)'. Below this, the account details are displayed, including the account owner 'Alyse Ware' and the category 'Auto / Transportation [1]'. A navigation bar contains various links, with 'Credit Notes (0)' highlighted by a red box. To the right, an 'Einstein Churn Prediction' widget shows a 'Likely to Churn' rate of 66.69% and a 'Top Predictors' category of 'Auto / Transportation [1]' with a +0.24% change.

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

The screenshot shows the Valpak Quick Quote creation interface. The quote is titled 'Q-407282 | Edit Quote' and has a total of USD 1,378.00. The quote information section shows the account name 'Training Demo' and a frequency of 1. The quote items are listed in a table:

#	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			<input checked="" type="checkbox"/>	165.600	USD 165.600		
3	LDP Postage	2/17/2025	5,000					110.000	USD 110.000		

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

The screenshot shows the Valpak CRM interface for a Quote record (Q-407282). The interface includes a navigation menu at the top with options like Franchise Sales, Home, Sales Lens, Sales View, Virtual Envelope, Leads, Contacts, Accounts, Tasks, Quotes, and Opportunities. The main content area is divided into sections: Trade and Barter Description, Participation Agreement Notes, and Additional Information. In the Participation Agreement Notes section, a note is entered: "Paid with funds collected through online deal sales". In the Additional Information section, fields for Quote Number (Q-407282), Expires On (2/27/2025), Frequency (1), Number of Multiclient bundles (0), SOLO Coordinator Assigned (Jim Beaton), and Number of Solo Bundles (0) are visible. At the bottom, there is a "Save" button and a "Cancel" button. Red circles with numbers 1 and 2 highlight the note and the Save button, respectively.

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

The screenshot shows the "Quick Case Create" form in the Valpak CRM. The form is titled "Quick Case Create" and has a "Support" button at the top left. The form fields are: Product Group (Clipp selected), Category (Billing selected), Type (Payment Allocations), Product (--None--), Subject (FAD Credit Allocation - Q-407282), and Case Opened On Behalf Of (Search People...). A "Next" button is at the bottom right. Red circles with numbers 1 through 6 highlight the following elements: 1. Support button, 2. Clipp radio button, 3. Billing radio button, 4. Payment Allocations dropdown, 5. Subject field, and 6. Next button.

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

The screenshot shows a web interface for creating a support case. At the top, there are tabs for 'Activity' and 'Support', with 'Support' selected. Below the tabs is the title 'Quick Case Create'. Underneath is a 'Compose text' section. This section features a rich text editor toolbar with options for font (Salesforce Sans), size (12), background color (black), bold (B), italic (I), underline (U), link, unlink, bulleted list, numbered list, indent, and outdent. Below the toolbar is a text input area containing the text: 'Please use credits from FAD and invoice remaining balance to be paid by credit card.' Below the text area 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 of the form are two buttons: 'Previous' and 'Next'.

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.

<input type="checkbox"/> 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

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

Configure Products

Clipper Misc Charge

Misc Charge Type: **Other** 1

Misc Charge Other Type: **FAD** 2

3 Save

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

Sandbox: SF15T | 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-407281 | Edit Quote
Total: USD 0.00

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

Quote Information

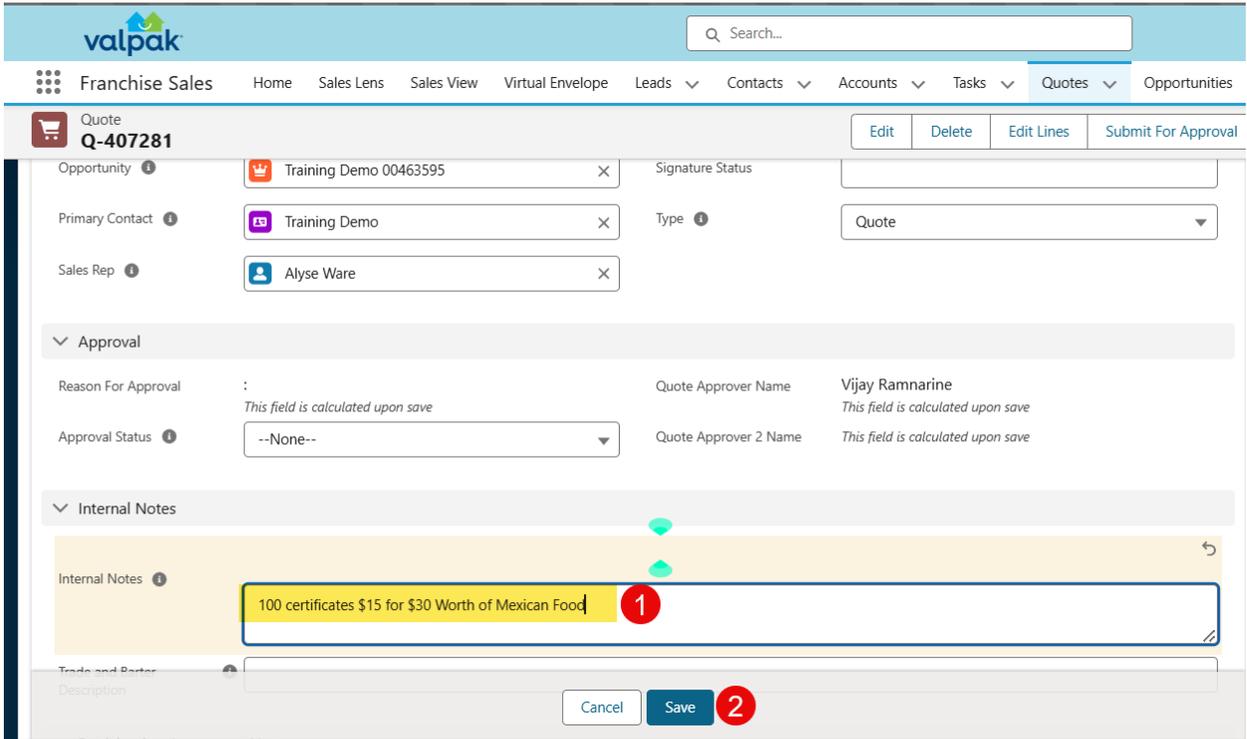
Account Name Training Demo Frequency 1 Title

Sales Campaign Search Campaigns

#	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		

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

