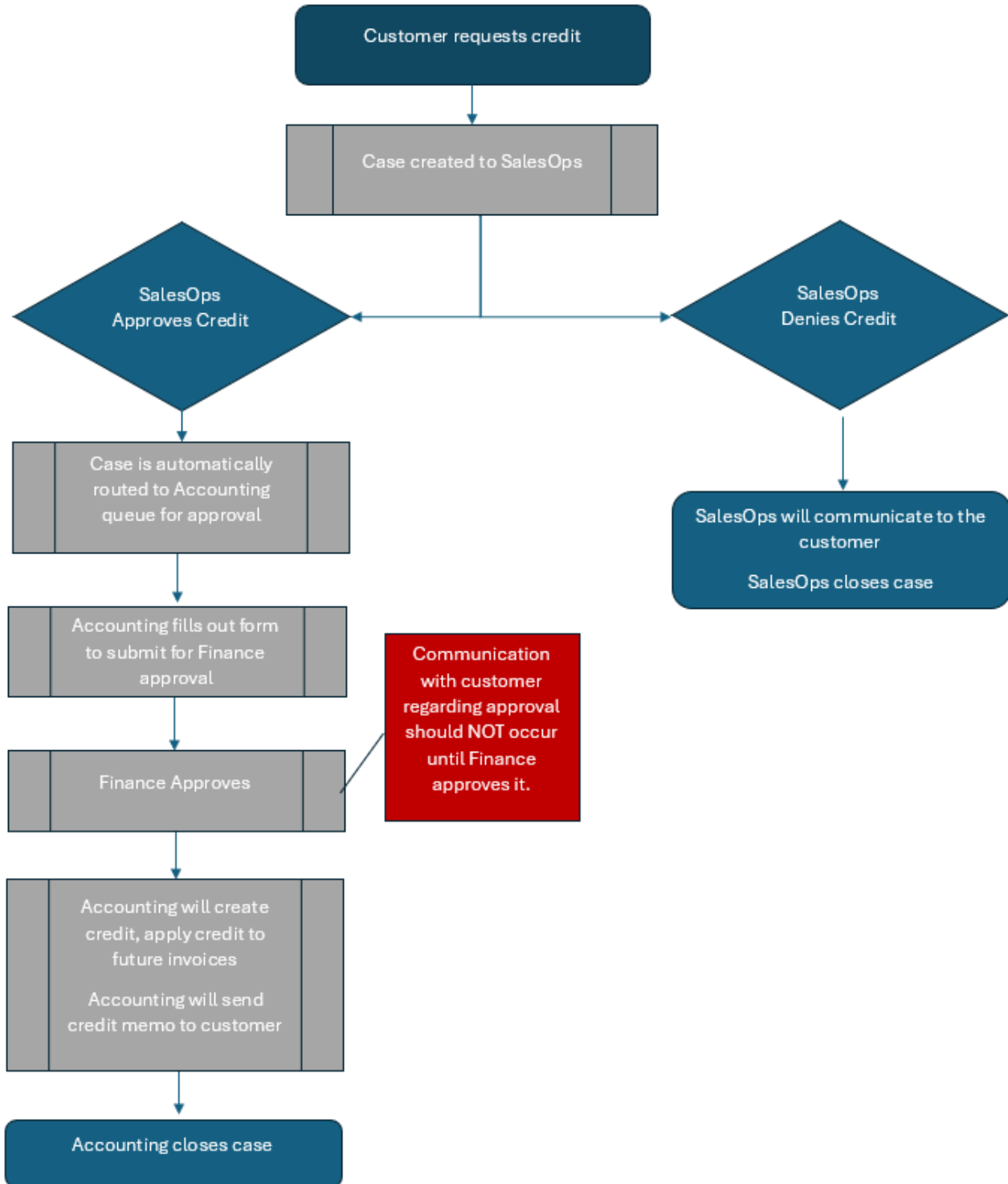


Credit Process

This process is used when a credit is requested.



Credit Case Submitted

NOTE: The customer's request must be via email before submitting a case.

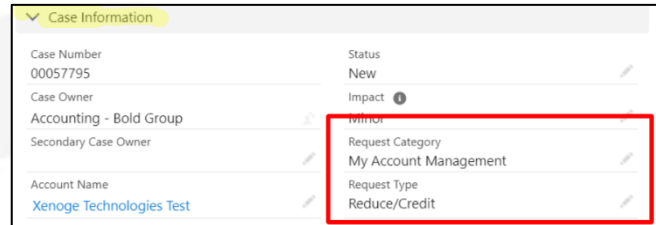
Case is submitted.

Request Category = My Account Management

Request Type = Credit, Cancellation,

Credit/Cancellation, Reduction, OR Reduce/Credit

See the article [How to submit a Request Case for Credit, Cancellation or Reduction](#)

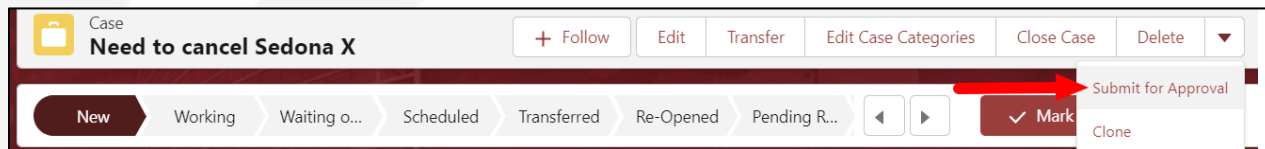


Case Information	
Case Number	00057795
Case Owner	Accounting - Bold Group
Secondary Case Owner	
Account Name	Xenoge Technologies Test
Status	New
Impact	Minor
Request Category	My Account Management
Request Type	Reduce/Credit

Submit to SalesOps for Approval

Click **Submit for Approval** button.

NOTE: You may have to click the drop down to view this.



Case: Need to cancel Sedona X

+ Follow Edit Transfer Edit Case Categories Close Case Delete

New Working Waiting o... Scheduled Transferred Re-Opened Pending R... Mark Clone

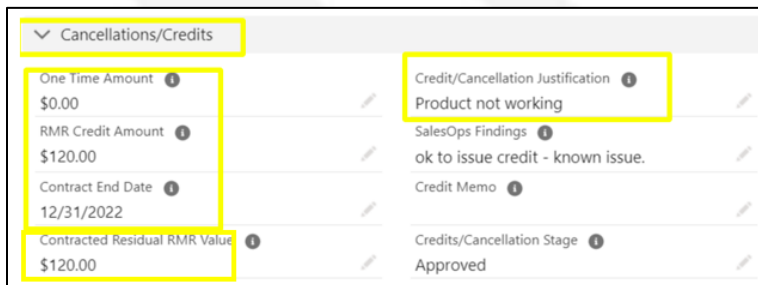
Submit for Approval

SalesOps Review

SalesOps reviews case.

Populate **Cancellations/Credits** section with the following:

- One Time Amount
- RMR Credit Amount
- Credit/Cancellation Justification
- Contract End Date
- Contracted Residual RMR Value



Cancellations/Credits	
One Time Amount	Credit/Cancellation Justification
\$0.00	Product not working
RMR Credit Amount	SalesOps Findings
\$120.00	ok to issue credit - known issue.
Contract End Date	Credit Memo
12/31/2022	
Contracted Residual RMR Value	Credits/Cancellation Stage
\$120.00	Approved

Credit Approved Process

SalesOps Approval

1. SalesOps determines case is justified; submits to Accounting queue for approval
2. Accounting completes internal form and submits to Finance for approval.

Click **Approve** button.

The screenshot shows a 'Case Approval' interface with a 'Pending' status. At the top right, there are three buttons: 'Approve', 'Reject', and 'Reassign'. A red arrow points to the 'Approve' button. Below the buttons, there is a table with the following information:

Submitter	Date Submitted	Actual Approver	Assigned To
Ops Evercommerce	Dec 9, 2022	Melissa Wilson Blanchard	Melissa Wilson Blanchard

Below the table, there is a 'Details' section with a 'No Comments' button. The 'Details' section also includes 'Approval Details' and a table with the following information:

Case Number	Account Name
00057795	Xenoge Technologies Test

IMPORTANT: Do NOT communicate this approval to the customer. Only after Finance approves should communication occur.

Finance Approval

1. Finance Reviews and approves credit.
2. Once approved, the Credit/Cancellation State = **Approved**. Case is reassigned to the Accounting queue.

The screenshot shows a 'Cancellations/Credits' form. The 'Credits/Cancellation Stage' field is highlighted with a yellow box and contains the value 'Approved'. The form also includes the following fields:

One Time Amount	Credit/Cancellation Justification
\$0.00	product was not working. Credit 3 months recurring.

RMR Credit Amount	SalesOps Findings
\$120.00	testing

Contract End Date	Credit Memo
10/31/2022	

Contracted Residual RMR Value	Credits/Cancellation Stage
\$0.00	Approved

3. Accounting team completes **Credit Memo** field and sends Credit Memo to the customer.
 - a. Go to **Activity**.
 - b. Click on the **Email** tab.
 - c. Select the [template] and complete the communication to the customer.
 - d. After customer acknowledges the email, Accounting to close the case.

The screenshot shows a 'Cancellations/Credits' form. The 'Credit Memo' field is highlighted with a yellow box. The form also includes the following fields:

One Time Amount	Credit/Cancellation Justification
\$0.00	product was not working. Credit 3 months recurring.

RMR Credit Amount	SalesOps Findings
\$120.00	testing

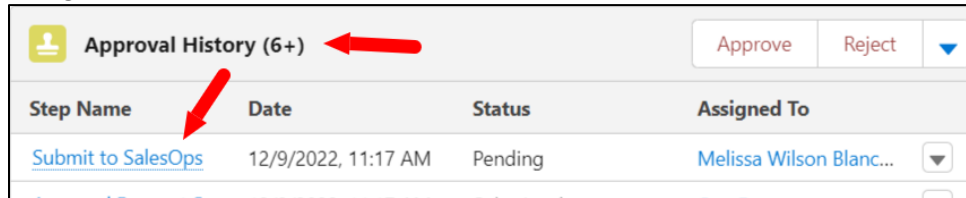
Contract End Date	Credit Memo
10/31/2022	

Contracted Residual RMR Value	Credits/Cancellation Stage
\$0.00	Approved

Credit Rejected Process

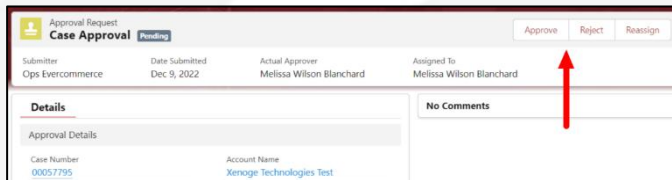
SalesOps determines case is not justified; approval **rejected**.

1. Navigate to Approval History. Click on the Step Name: *Submit to SalesOps* (or click on link from email).



Approval History (6+)				Approve	Reject	▼
Step Name	Date	Status	Assigned To			
Submit to SalesOps	12/9/2022, 11:17 AM	Pending	Melissa Wilson Blanc...			

2. Select the **Reject** button. Put in notes as to why the credit is rejected.



Approval Request		Case Approval		Approve	Reject	Reassign			
Submitter	Date Submitted	Actual Approver	Assigned To						
Ops Evercommerce	Dec 9, 2022	Melissa Wilson Blanchard	Melissa Wilson Blanchard						
Details		No Comments							
Approval Details									
Case Number	Account Name								
00057795	Xenoge Technologies Test								

3. An email is sent (by SalesOps) to customer notifying them of the rejection. See rejection email template below.
4. A task with the subject of “[External Email Sent] CCC Request Denied” is created on the case.

Rejection Email Template

{!Today}

Dear {!Case.Contact},

Thank you for reaching out to us about your credit request. The Bold Group operations team has carefully reviewed your case, and unfortunately, we are not able to grant your request for credit.

The satisfaction of our customers is our priority, but we must honor agreed upon terms and conditions and company policies to maintain the highest quality, standards, and values in how we do business.

We know this is not the outcome you hoped for and greatly appreciate your understanding and patience throughout this process. We want your organization to have success using Bold Group’s software, and we are dedicated to channeling our resources to help you gain value from your investment.

If you have any questions or concerns, do not hesitate to reach out by opening a case in the Bold Group Support Portal.

Please know that we appreciate your business and continued partnership with Bold Group.

Sincerely,
Bold Group