How to submit a Request Case for Credit, Cancellation or Reduction

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Use this process when a customer is requesting a credit, cancellation or reduction.

The customer's request must be sent via email prior to submitting a case.

1. Create a New case on the account making the request
2. **Contact Name**: Add Contact making the request
3. Select **Case Origin**
4. **Category:** select Change Order
5. **Product**: select product the request is for. If a customer is requesting multiple platforms we will need a case for each platform
6. **Sub Product** should be set to Other
7. **Request Category:** My Account Management
8. **Request Type:** Select one of the following Reduction, Cancellation, or Cancel/Credit
9. **Billable/non-billable:** set to Non-Billable
10. Complete the Subject Line – with a clear statement of the customer's request
11. Complete the description
12. Save case.
13. Attach the customer's email request to the case as a file
14. Submit Case for approval. Use the drop down arrow next to the Clone button

15. Select **Submit for approval**
16. Add your comments to the submit for approval box that will pop up and select submit.

This will submit the case to Sales Ops and send notification that there is a new case in the queue. The case owner is automatically updated to Sales Ops.

Here is the workflow of the case after it is submitted.