CCC Template to Post in Salesforce Case (CSM)

11/21/2025 12:13 pm EST

CCC Template to Post in Salesforce Case
Re: [Customer Name]

What is the Request:

☐ **Acquisition**

Request legal documents showing acquisition and upload/drop in case.

☐ **Billing Inquiry**

Specify what is incorrect or requires correction on the current invoice and upload written request in case.

Overall Objective: Correct the invoice promptly, as many customers use auto draft payments and delays may require refunds if departments do not act quickly.

Process:

1. Acknowledge receipt of request with customer.
2. Reference KB for appropriate Genpac contact information.
3. Tag the relevant Genpac resource in the case requesting information.
    - If no response after **24 hours**, tag again for status update.
    - If no response after **48 hours**, escalate by tagging EC Billing & AR Manager.
    - Repeat escalation process every **24 hours** as needed.
4. Ensure customer is contacted (if appropriate) or provide requested information from the billing team.
5. Close the case.

☐ **Cancellation**

A full system cancellation request.

Overall Objective: Attempt to retain the customer before cancellation. Involve the Account Manager immediately. Request written documentation from the customer specifying:

- Which system(s) do they wish to cancel (AB, MG, SO, Stages, SIMS)
- Desired cancellation date
- Reason for cancellation
- Additional information useful for product improvement
- Justification (paragraph justifying the credit or reason why we do not feel it is viable)

Process:

1. Acknowledge receipt of request with customer.
2. Verify account page for authorized contacts:
    - If none, proceed.
    - If authorized contacts exist, ensure the requesting contact is listed.
    - If not listed, reach out to authorized contacts to gain permission to add them in Salesforce.
3. Check applicable MSA for the account:
    - Review Closed/Won Opportunities since **6/3/2024**.
    - Requests after this date require **90 days written notice**, unless custom contract terms apply.
4. Contract verification:
    - Navigate to: **Bold Group Projects → Documents → Contracts → All Documents**.
    - Check customer folder spreadsheet for current contract/license details.
    - Reference the most recent contract for current terms.
5. Contact customer to review request:
    - Understand reasoning to assess if the account can be retained.
    - Request written confirmation if not already provided.
    - Inform Sales contact of the request and current contract terms.
    - Document conversation.
6. Reassign case owner to SalesOps and enable email notification.
7. SalesOps determines legal needs and generates S&R.
8. Send S&R to customer via DocuSign.

☐ **Contact Information Update**

Receive request via email (include Name, Email Address, and Phone Number) and upload in case.

☐ **Credit**

Explain reason for credit request (e.g., incorrect billing, product not live, technical issues, etc.).

☐ **Reduction**

A module reduction requested by customer.

Overall Objective: Specify which module is being reduced, the requested effective date, and obtain written request.

Process:

1. Acknowledge receipt of request with customer.
2. Verify account page for authorized contacts (same process as "Cancellation" above).
3. Check applicable MSA and contract terms (same process as "Cancellation" above).
4. Contact customer to review request:
    - Request written confirmation if not already provided.
    - Inform of current contract terms.
    - Document conversation.

5. Reassign case owner to SalesOps and enable email notification.

☐ **Renewal**

All renewals except QuoteWerks (QW) and QuoteValet (QV) go directly to Sales.
QW and QV renewals handled by Ops.

Note: Confirm the contact is an approved contact listed in the Related Contacts section of the account.

Customer Email Request Included:

☐ Yes ☐ No
(If "No," do not send to Ops — request cannot be processed without documentation.)

Customer Request:

(Copy and paste description information from the case "Details" page below)

OPS TO FILL OUT BELOW

- **Is the customer current on their account?** ☐ Yes ☐ No
- **If No, total due:** $_______
- **Master Contract or Latest Contract with MSA:**
  [Drop file here]
- **FE Date:** ___ / ___ / ___
- **Terms:** ☐ MSA ☐ Special T&Cs

Action Items

- **Billing:** ________________________________
- **Support:** ________________________________
- **Ops:** ________________________________

Lost RMR: $_______