CCR Data Dictionary (Employee Reference)

06/08/2026 3:57 pm EDT

Internal Reference Use this as a quick reference when filling out a CCR case.

1. REQUEST CLASSIFICATION (DETAILS TAB)

Field	Definition	Type	Required	When to Use	Example
Request Category	Identifies case as a CCR request	Picklist	Yes	Always select for CCR	CCR – Credit / Cancellation / Reduction
Request Type	Primary reason for request	Picklist (Single)	Yes	Choose best match for customer ask	Full Cancellation
Product	Product impacted	Picklist	Yes	Always required	Managely
Sub Product	Specific module impacted	Picklist	Conditional	Required for partial reductions	Billing Module
Account Name	Customer account	Lookup	Yes	Always	Surveillance Solutions
Status	Current case stage	Picklist	Yes	System-driven	Working
Owner	Person responsible for CCR	User	Yes	Assigned automatically or manually	CSM name

2. CCR ACTION & ROOT CAUSE

Field	Definition	Type	Required	When to Use	Example
CCR Financial Actions	Financial changes being made	Multi-Select	Yes	Select ALL that apply	Partial Reduction + Credit

CCR Reason Code	Why the request is happening	Multi-Select	Yes	Select root cause(s)	Billing Issue
CCR Justification	Customer-facing explanation	Long Text	Yes	Always required	Billing error over 3 months
Internal Findings (Sales Ops)	Internal validation + analysis	Long Text	Yes	Always required	Contract reviewed, valid claim
CCR Stage	Stage of CCR lifecycle	Picklist	Yes	Tracks progress	Pending Approval

3. CREDIT PROCESSING

Field	Definition	Type	Required	When to Use	Example
One-Time Credit Amount ($)	Total credit value	Currency	Conditional	When issuing credit	$2,500
Effective Credit Date	When credit applies	Date	Conditional	Credit scenarios	4/1/2026
Credit Type	Type of credit	Picklist	Conditional	Credit scenarios	MRR Credit
Credit Memo	Accounting reference ID	Text	No	After approval	CM-10234

4. MRR / FINANCIAL IMPACT

Field	Definition	Type	Required	When to Use	Example
Current Monthly MRR ($)	Current recurring revenue	Currency	Conditional	Discount scenarios	$5,000
Monthly MRR Impacted ($)	MRR affected by delay	Currency	Conditional	MRR Push	$3,000
Monthly MRR Lost ($)	Revenue being removed	Currency	Conditional	Cancellation/Reduction	$2,000

MRR Stop Date	When billing stops	Date	Conditional	Cancellation/Reduction	5/1/2026
Original MRR Start Date	Original billing start	Date	Conditional	MRR Push	3/1/2026
New MRR Start Date	New billing start date	Date	Conditional	MRR Push	6/1/2026
Total ARR Impact ($)	Annualized revenue impact	Formula	Auto	Always calculated	$24,000

5. DISCOUNT DETAILS

Field	Definition	Type	Required	When to Use	Example
Discount Type	Structure of discount	Picklist	Conditional	Discount scenarios	Percent
Discount Amount	Value of discount	Currency/%	Conditional	Discount scenarios	20%
Discount Start Date	When discount begins	Date	Conditional	Discount scenarios	4/1/2026
Discount End Date	When discount ends	Date	Conditional	Discount scenarios	7/1/2026

6. CONTRACT & APPROVAL

Field	Definition	Type	Required	When to Use	Example
Contractual Allowance Exists?	If contract allows request	Picklist	Yes	Always required	No
Exception Required	If request violates contract	Checkbox	Conditional	When outside terms	Checked
Exception Approval Level	Required approval authority	Picklist	Conditional	If exception required	Head of Growth

7. QUICK FIELD RULES (HOW TO THINK ABOUT IT)

Field Group	What You're Answering
Request Type	What is the customer asking for?
Financial Actions	What are we actually doing financially?
Reason Code	Why is this happening?
Justification	How do we explain this clearly?
Financial Fields	What is the revenue impact?
Contract Fields	Are we allowed to do this?

8. REQUIRED FIELD SUMMARY

Always Required

- Request Type
- Product
- CCR Financial Actions
- CCR Reason Code
- CCR Justification
- Contractual Allowance Exists

Conditionally Required

Scenario	Required Fields
Credit	Amount + Date + Type
Cancellation	MRR Lost + Stop Date
Partial Reduction	Sub Product
Discount	All discount fields

MRR Push	Start Dates + MRR Impact

9. BEST PRACTICES

- Be **specific and factual** (avoid vague language)
- Always **validate contract before submitting**
- Select **ALL applicable financial actions**
- Ensure **MRR impact is accurate** (this hits reporting)