Approving a CCR Credit Request

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Option 1: Approve via Email

1. You will receive an email notification regarding a CCR Credit Request.
    - Example below
2. Click the link in the email to open the case in Salesforce.
3. In the QuickLinks section, click Approval History.
4. Locate the row that contains your name and click the Step Name.
5. Select one of the following actions:
    - Approve – Approves the CCR request.
    - Reject – Rejects the CCR request.
    - Recall – Removes the request from the SalesOps queue and allows it to be routed to another queue (for example, the CSM Team).

Option 2: Approve via Report

1. Open the Salesforce report:
    - **CCR Credits To Be Approved by Jenn K**
2. Review the requests awaiting approval.

Subscribe to the Report

To have the report delivered to your inbox automatically:

1. Click the dropdown arrow next to Edit.
2. Select Subscribe.
3. Configure the desired delivery schedule and notification settings.
4. Click Save.

Option 3: Approve via Queue

1. Open Salesforce.
2. Verify that you are in the Service Console.

3. From the navigation menu, select Cases.
4. Click the queue dropdown menu.
5. Select SalesOps.
    - This displays all cases currently awaiting approval in the SalesOps queue.
6. Click the appropriate Case Number.
7. In the QuickLinks section, click Approval History.
8. Locate the row that contains your name and click the Step Name.
9. Select one of the following actions:
    - Approve – Approves the CCR request.
    - Reject – Rejects the CCR request.
    - Recall – Removes the request from the SalesOps queue and allows it to be routed to another queue (for example, the CSM Team).