

CCR Credit Processing Field Completion

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SOP: CCR Credit Processing Field Completion

Purpose

This SOP defines field ownership and completion requirements for the Credit Processing section of CCR cases in Salesforce.

Scope

This process applies to all CCR cases that require credit processing.

Field Ownership

Field	Responsible Team
One-Time Credit Amount	CSM Team
Credit Type	CSM Team
Requested Credit Date	CSM Team
Impact	Billing Team
Credit Applied	Billing Team
Total Credit Amount Applied	Billing Team
Effective Credit Date	Billing Team
Credit Memo	Billing Team

Requirements

The CSM Team must complete only the following fields before routing the case for Ops review and approval:

- One-Time Credit Amount
- Credit Type
- Requested Credit Date

The Billing Team must complete all remaining Credit Processing fields after the case has been approved and routed for billing review.

The CSM Team should not enter information in Billing-owned fields unless specifically instructed.

Field Definitions

Credit Memo

Enter the Credit Memo Invoice No. from the billing system.

Effective Credit Date

Enter the date the credit was applied and entered into the billing system.

Procedure

1. The CSM Team completes the CSM-owned fields listed above.
2. The CSM Team routes the case for Ops review and approval.
3. After approval, the Billing Team completes all Billing-owned fields listed above.
4. The Billing Team confirms the credit information matches the billing system.
5. The CCR case may be closed only after all required Credit Processing fields have been completed by the correct team.

Case Closure Requirement

Do not close a CCR case until all Credit Processing fields have been completed according to the field ownership table in this SOP.
