

# No Charge Request User Reference

## 1 Create a New No Charge Request

### 1.1 Login and switch to lightning experience

If you login as classical format, switch to Lightning Experience by clicking the link at top right, as illustrated in Fig. 1. This step is not necessary, just to let you know that this module is designed for Lightning Experience.

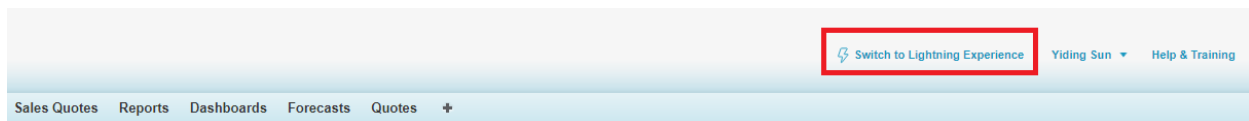


Figure 1. Switch to Lightning Experience

### 1.2 Create a No Charge request

If you are to create a new No Charge request, follow these steps:

**Step 1.** Click the symbol on top left. Select “No Charge Requests” as shown in Fig. 2.

**Step 2.** Click “New” button as shown in Fig. 3.

**Step 3.** Fill in all information required (fields with red asterisk mark), including but not limited to: No Charge Reason, Original Order Number, New Order Number, Explanation. Fig. 4.

Note: The default value of No Charge Amount is 25% of the list price of new order and sales reps are disabled to change it. Fields circled grey cannot be modified by sales rep.

**Step 4.** Click “Save” button to save the record.

**Step 5.** Click “Related”. You can upload any kind of files that you prefer in “Notes & Attachments” as shown in Fig. 5. You can also see Approval history via this page.

**Step 6.** Submit the No Charge request for approval by click “Submit for Approval” button, as shown in Fig. 6.

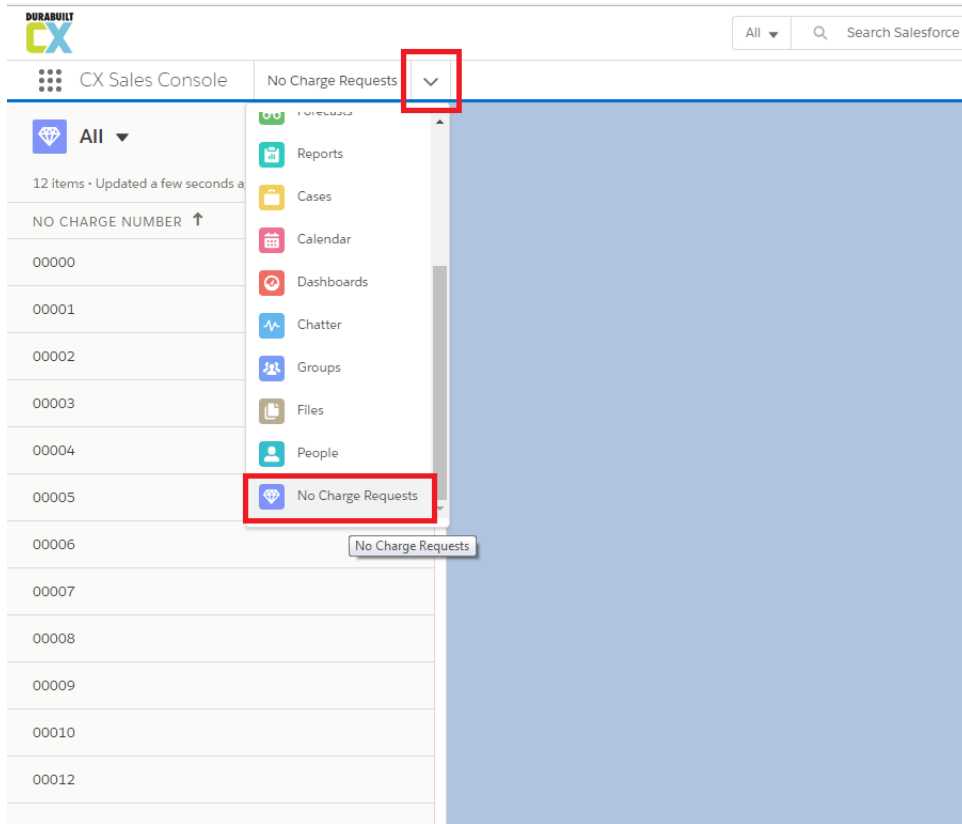
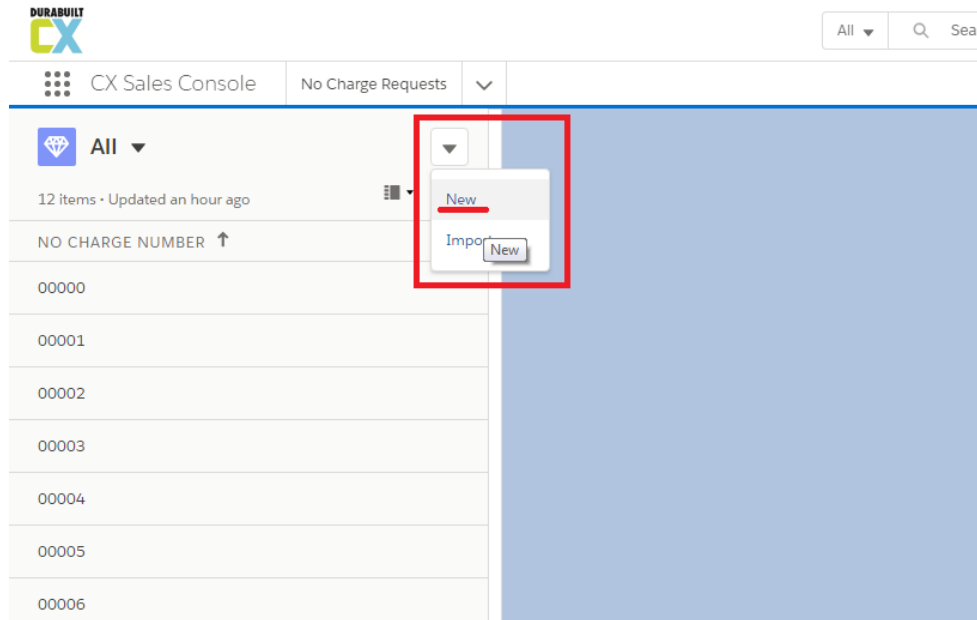
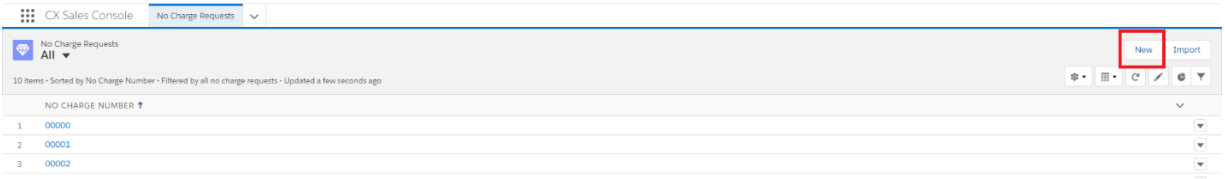


Figure 2. Open New Charge Requests in CX Sales Console.



(a)



(b)

Figure 3. Create a new No Charge request.

The screenshot shows the 'New No Charge Request' form. The 'Information' section is highlighted with a red box. It contains several fields: 'No Charge Reason' (a dropdown menu currently showing '--None--'), 'Original Order Number' (a search field with 'Search Sales Orders...'), 'No Charge Number', 'New Order Number' (a search field with 'Search Sales Quotes...'), 'No Charge Amount', and 'Explanation' (a text area). To the right of the 'Information' section, there are fields for 'Status' (Not Submitted), 'Owner' (Craig Olsen), 'Chargeback To', and 'Chargeback Amount' (0).

Figure 4. Fill in the information of required fields.

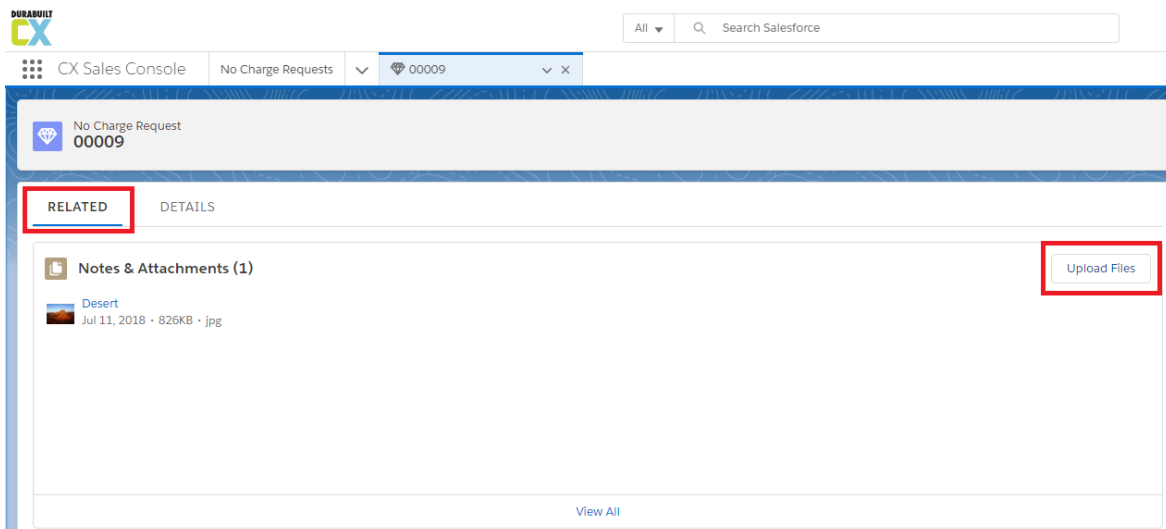


Figure 5. Notes & Attachments.

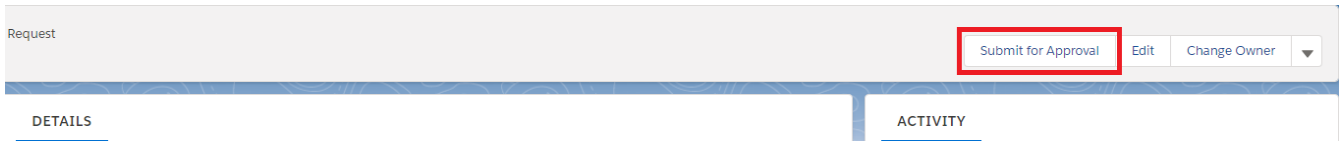


Figure 6. Submit for Approval.

## 1.3 Special Rules & Notes

1. When the No Charge reason is not one of “Donation, Marketing”, the Original Order Number is required. The customer of the original order (original sales order) and new order (new sales quote transferred from CX) should be the same one. If not, the system shall show error, as shown in Fig. 7.

Review the errors on this page.

• The Original Order Number is required. Please check.

Review the errors on this page.

• The customer information of Original Sales Order and New Sales Order is different. Please check for coherence.

Figure 7. Validation rule.

2. When the no charge reason is one of “Donation, Marketing”, the Original Order Number is not required.
3. When the No Charge Request is saved and the Status is “Not Submitted”, you can still edit the details.
4. After “Submit for Approval”, the No Charge Request is locked and continue to the approval process. You cannot edit the record after the submission. Fig. 8.

Review the errors on this page.

This record is locked. If you need to edit it, contact your admin.

Figure 8. Lock record after submission.

5. You can modify the record details again after the rejection of approval process, in other words, when the status is “Not Authorized”.

## 2 After Submitting for Approval

### 2.1 Notification

After “Submit for Approval”, both Sales rep and owner shall receive an email of Pending Notification. And level 1 approver shall receive an approval request notification. So the same as level 2 approval process. You are notified in three ways as following:

- Email alert;
- Notifications in Salesforce, as shown in Fig. 9.
- Approval History in Salesforce, as shown in Fig. 10.

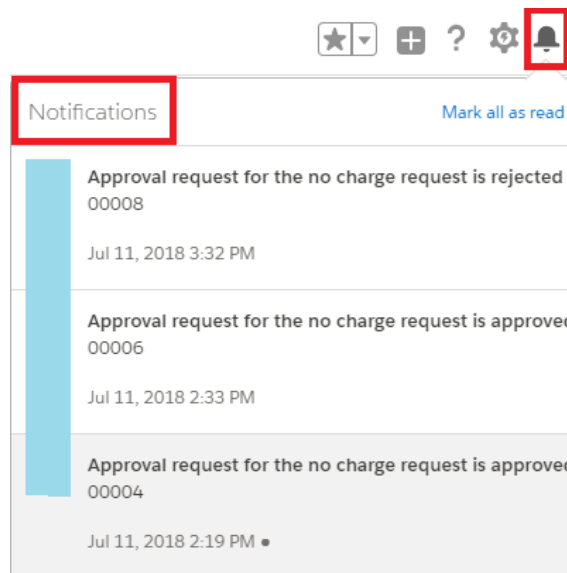


Figure 9. Notification in Salesforce.


You shall receive an email notification of every level approval.

### 2.2 Comments


You can review the comments of each level approval in “Related”. In the approval history, click “View All” as shown in Figure 10. Then you shall see the details of each level approval, as shown in Fig. 11. It is important to review the details of approval history after rejection.

RELATED


DETAILS


**Notes & Attachments (1)**

Upload Files


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**Approval History (5)**

STEP NAME	DATE	STATUS	ASSIGNED TO
<a href="#">General Manager</a>	7/11/2018 4:46 PM	Rejected	<a href="#">Amar Randhawa</a>
<a href="#">Sales Manager / Branch Ma...</a>	7/11/2018 4:42 PM	Approved	<a href="#">Bo Sandhu</a>
<a href="#">Approval Request Submitted</a>	7/11/2018 4:40 PM	Submitted	<a href="#">Craig Olsen</a>
<a href="#">Sales Manager / Branch Ma...</a>	7/11/2018 4:36 PM	Rejected	<a href="#">Bo Sandhu</a>
<a href="#">Approval Request Submitted</a>	7/11/2018 4:19 PM	Submitted	<a href="#">Craig Olsen</a>

[View All](#)

Figure 10. Approval history.

No Charge Requests > 00009

**Approval History**

5 Items · Sorted by Is Pending, Date · Updated a few seconds ago

STEP NAME	DATE ↓	STATUS	ASSIGNED TO	ACTUAL APPROVER	COMMENTS
1 <a href="#">General Manager</a>	7/11/2018 4:46 PM	Rejected	<a href="#">Amar Randhawa</a>	<a href="#">Amar Randhawa</a>	not approved
2 <a href="#">Sales Manager / Branch Manager</a>	7/11/2018 4:42 PM	Approved	<a href="#">Bo Sandhu</a>	<a href="#">Bo Sandhu</a>	
3 <a href="#">Approval Request Submitted</a>	7/11/2018 4:40 PM	Submitted	<a href="#">Craig Olsen</a>	<a href="#">Craig Olsen</a>	Done.
4 <a href="#">Sales Manager / Branch Manager</a>	7/11/2018 4:36 PM	Rejected	<a href="#">Bo Sandhu</a>	<a href="#">Bo Sandhu</a>	attach picture
5 <a href="#">Approval Request Submitted</a>	7/11/2018 4:19 PM	Submitted	<a href="#">Craig Olsen</a>	<a href="#">Craig Olsen</a>	

Figure 11. Approval history details.

## 2.3 After Rejection

The No Charge Request is unlocked after rejection. Thus, you can modify the record and submit for approval again. Sometimes, you should modify the record according to the comments of approver.

Note: The No Charge requests are available on computer, mobile website and mobile app.