Klarstig

# Sales Professional Services Service Credit Claim

Describe a loss, expense or service issue and provide the evidence supporting your claim. Submitting a claim does not establish eligibility or guarantee reimbursement.

## Contact and reference

**Organization using this document**

**Your name or contact reference ***

**Email for a reply if needed**

## Information for this document

**Order policy or account reference ***

**Date of the event or expense ***

**What happened ***

**Amount claimed ***

**Currency ***

- ☐ USD
- ☐ EUR
- ☐ GBP
- ☐ CAD
- ☐ Other

**Other currency code if selected**

### Resolution requested *

### Receipts photographs or other evidence

Attach separately - uploads work in the online form only.

### Previous contact and reference

## Specific details

### Service agreement period and affected charge

Complete when relevant to this request.

### Service issue evidence policy reference and credit calculation

## Operating context

### Client engagement and service area

Complete when relevant to this request.

### Deliverables review contacts timing and confidentiality instructions

## Team specific details

### Account opportunity or sales owner

Complete when relevant to this request.

**Customer needs buying stage commitments and next agreed contact**

## Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- No payment is taken by default. Online payment needs a connected payment account and is configured separately.
- File uploads work online only. The printable version lists the documents to attach but cannot collect them.
- Some questions become required only after certain answers. The printable version shows every question.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

**Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.**

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