Work instruction document

This is a general directional guide for handling the credit request scenarios.

Credit Request – EMEA

Guidelines to request credit on a batch of invoices or multiple credit request.

Compiled by J. Luis Sanchez Pino
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PURPOSE

Provide the steps to request credit on a group of invoices.

SCOPE

Group of 10 or more invoices that belongs to same EMEA region and currency. The credit adjustment on all invoices is for the same reason and discount type – however they can have different discount percentage.

You can used this procedure for direct sales and distributors.

The credit adjustment could be for discount promotions, voucher or adjustments on price list. It can include goodwill credits not related to any promotion or marketing campaigns.

This procedure does not apply for collection bad debts, uncollectable balances or write offs, invoices with two or more fiscal years old.

PROCEDURE

Please sent your request for multiple credits to these two emails (make sure to include both):

EMEACredit-Query emeacredit-query@aligntech.com

eucredit eucredit@aligntech.com

Description

- Your request must state briefly but clearly a description for the credit. Please indicate the reason for credit (see image 01)

Reason for Credit	Description
ARK / Charity	This is used on qualified cases
System/Operational Issue	Customer is not liable for the missing discount
Clinical & Product Deficiency	PSA and cases that qualify for this category
Good Will/Customer Satisfaction	Customer is not entitled, but credit was offered
University	Missing promotion, vouchers, discounts to Universities

- If the discount requested is for a promotion or a voucher, please name the promotion type or voucher. If the credits is not a promotion, please support your reason to offer this discount.

- State the discount percentage or range of discount percentages offered. If the discount is a fixed amount – please indicate this amount.

Attachment

- Attach an excel file with below columns (see image 02):

Sales Order
Invoice Number
Net Discount %
Currency
Country

	A	J	P	Q	S
1	SO #	INV Number	Net Discount %	Credit Note: Currency	Country
23	27256574	9011792269	19.00%	USD	ZA
24	27374561	9011792261	19.00%	USD	ZA
25	27423760	9011918401	28.00%	USD	ZA
26	27476861	9011918406	36.00%	USD	ZA
27	27477318	9011918400	36.00%	USD	ZA
28	26643238	9010840578	53.00%	USD	ZA
29	26735397	9010840572	19.00%	USD	ZA
30	26757306	9010840583	19.00%	USD	ZA
31	26789437	9011077288	19.00%	USD	ZA
32	26839254	9011669990	36.00%	USD	ZA
33	27012352	9011317742	36.00%	USD	ZA
34	27144587	9011548767	19.00%	USD	ZA
35	27214362	9011548768	19.00%	USD	ZA
36	27214995	9011669985	36.00%	USD	ZA
37	27248142	9011669982	36.00%	USD	ZA