Metabase alert: Active merchants with no users with chargeback notifications enabled
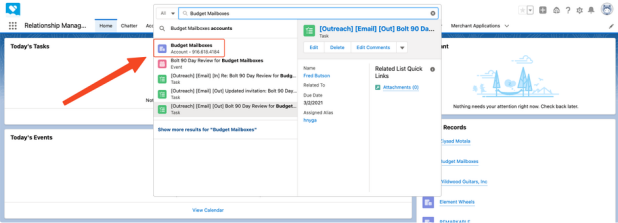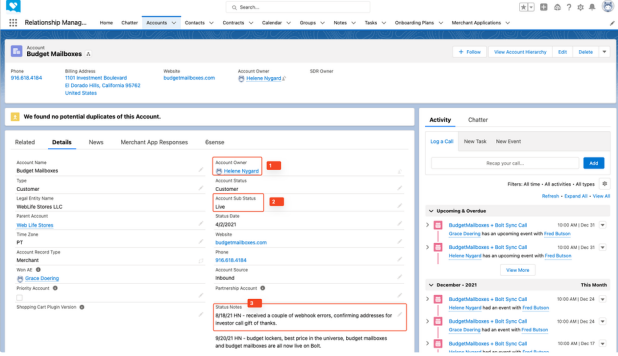
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How to Identify

Ticket Subject	Screenshot
Alert: Active merchants with no users with chargeback notifications enabled has results	

What to do

	Instruction Step	Screenshot
1	ℹ️ Only live merchants need on the alert list need to be actioned. Analysts need to screen the list in the alert to identify any live merchants. The list may show merchants with *"DO NOT USE"* in the name. These can be skipped. 👆 This alert fires and sends an email daily. However, the alert does not need to be actioned on daily, but rather just on a weekly basis. Therefore, a rule of thumb can be to just complete this playbook for the alert that comes in on a Monday, and merge/ignore all future emails for this alert the rest of the week. Open Salesforce and search for the merchant name in the search bar. Select the corresponding **Account** (they'll show with a purple icon). Relevant details on the Account page: • **Account Sub Status:** Only LIVE merchants in the alert list need to be actioned. • **Account Owner:** The CSM and the point of contact within Bolt if this merchant needs to be actioned. • **Status Notes:** Notes added by the CSM for additional details/context. If a merchant is LIVE, move to the next step below. 👇	 Searching for and finding the Budget Mailboxes account in Salesforce. Accounts show next to a purple building icon.
2	Open a Business Escalation with the CSM by following the steps in this playbook: 📄 Business Escalation Playbook Example issue summary: Hi @CSM 👋 *MERCHANT* does not have any users enabled to receive chargeback notifications - please	

	contact them and ensure they are enabled for at least one user for chargeback notifications. Thanks!	
	⚠ The merchant may have already been recently flagged by another Analyst. Search within that channel (`CMD+F` while you have the channel open) to double check.	
3	Repeat these steps until the entire alert list has been covered. Solve the alert in Zendesk.	

Changelog

Version Number	Person who Made Change	Modification Date	Modification Summary
1.0.1	Ziyaad Motala	12/12/22	• Changed the process for us informing CSM
1.0.0	Ziyaad Motala	7/27/22	• Created Alert Playbook