ACCOUNT CHANGE & CREDIT REQUEST TEMPLATE

Stop account changes from slipping past billing.

A request form, credit approval table, billing checklist and change log for upgrades, downgrades, add-ons, credits and cancellations. Use it as is, or copy the fields into your CRM or ticketing system.

Why account changes leak revenue

Most revenue doesn't slip at the sale. It slips later, when an account changes. An upgrade agreed on a call never reaches Billing. A credit is applied without approval and never ends. A cancellation is processed, but the subscription keeps running. Each one is small, and together they add up quietly until the numbers don't reconcile.

The fix is one path for every change: a clear request, the right approval, a confirmed update in billing, and a record anyone can check.

How to use this template

> **Part 1:** the requester fills out the Account Change Request for every change, no matter how small.

> **Part 2:** credits, refunds and discounts also use the Credit Request and follow your approval table.

> **Part 3:** Billing works through the checklist before marking the change complete.

> **Part 4:** every change is logged, and the log is reviewed monthly.

> Set your approval limits in Part 2 once, share them with Sales, Customer Success and Billing, and use the same form every time.

PART 1

Account Change Request

Complete one request per account change. Nothing is updated in billing without a completed request.

REQUEST DETAILS	
Request date	
Requested by (name and team)	
Customer / account name	
Account or customer ID	
Type of change	☐ Upgrade ☐ Downgrade ☐ Add-on ☐ Seat or quantity change ☐ Cancellation ☐ Renewal change ☐ Other
What is changing (product, plan, quantity)	
Current price	
New price	
Effective date	
Proration needed?	☐ Yes ☐ No ☐ Not sure
Signed amendment or written customer approval on file?	☐ Yes ☐ No
Reason for the change	
Notes for Billing	

PART 2

Credit, Refund and Discount Request

Use this in addition to Part 1 whenever money is credited, refunded or discounted.

CREDIT, REFUND OR DISCOUNT	
Type	☐ Credit ☐ Refund ☐ Discount ☐ Free period
Amount or percentage	
Invoice number(s) affected	
Reason	☐ Billing error ☐ Service issue ☐ Goodwill ☐ Sales concession ☐ Other
One-time or recurring?	☐ One-time ☐ Recurring
End date (if recurring)	
Related support ticket or dispute	
Approved by	
Approval date	

Your approval table

Fill in the limits that fit your business. Every credit or discount needs an approver before it's applied.

CREDIT OR DISCOUNT AMOUNT	WHO CAN APPROVE	NOTIFY
Up to $ _____		
$ _____ to $ _____		
Over $ _____		
Any recurring discount		
Any refund		

PART 3

Billing checklist

Billing confirms each item before marking the change complete.

1	The request is complete, and approval is on file where required.	☐
2	The change matches the signed amendment or the customer's written approval.	☐
3	The subscription, plan or quantity is updated in the billing system.	☐
4	Proration is calculated and shows correctly on the next invoice.	☐
5	The CRM record matches the billing system after the update.	☐
6	Credits and discounts have an end date entered, if they're not permanent.	☐
7	For cancellations, future invoices are stopped and the final invoice is confirmed.	☐
8	The requester and Customer Success are told the change is complete.	☐
9	The change is entered in the change log (Part 4).	☐

Monthly review

10	Every change in the log shows as billed.	☐
11	No credits or discounts are running past their end date.	☐
12	Cancellations this month have no invoices after their end date.	☐
13	Recurring discounts are still approved and still needed.	☐
14	Any change without a completed request is followed up.	☐

PART 4

Change log

Log every account change, credit and cancellation. The first row is an example.

DATE	CUSTOMER	CHANGE TYPE	OLD → NEW	EFFECTIVE	APPROVED BY	BILLED?
Mar 3	*Example Co.*	*Upgrade*	*10 → 15 seats*	*Mar 15*	*CS lead*	*Yes*

PART 4, CONTINUED

Automate the change log

Every company needs a change log. Few should keep one by hand. A manual log depends on someone remembering to fill it in, which is the same gap that lets changes slip past billing in the first place. Once the request process above is in place, the log can build itself.

How an automated change log works

One trigger. The Account Change Request lives as a form in your CRM, help desk or a shared form tool, so every change starts in the same place.

Automatic logging. When a request is submitted or approved, a workflow automation adds the entry to the change log and notifies Billing, with no copying and pasting.

Status that updates itself. When the change is made in the billing system, the log is marked as billed. Anything still open after a set number of days is flagged.

AI as the reviewer's assistant. AI can summarize each change in plain language, pull terms from the amendment or email, and flag mismatches between the CRM, the contract and the billing system for a person to check.

People still decide. Approvals, credits and anything that changes what a customer pays stay with a named person. Automation handles the busywork; your team handles the judgment.

What right looks like: every account change is captured once, logged automatically, confirmed in billing, and reviewed monthly in minutes instead of hours.

Where to start

15 Use the Part 1 and Part 2 fields as your form, in the system your team already works in. ☐

16 Decide which system is the source of truth for each customer's plan and price. ☐

17 Automate the log entry and the notice to Billing first. That alone removes most of the manual work. ☐

18 Add AI summaries and mismatch flags once the basic workflow runs the same way every time. ☐

19 Keep the monthly review (Part 3) so a person confirms nothing slipped. ☐

Want help putting this in place?

A template is the starting point. The real savings come when the request, approval and change log run automatically inside the tools your team already uses. I design the process, build the automation, and add practical AI where it saves time, with people reviewing anything that affects what customers pay.

Start with an Operations Assessment

A one-time review of how your customer lifecycle runs today, from sales handoff through collections, including account changes, billing, revenue leakage, and where automation and AI can take manual work off your team. You get clear findings and prioritized recommendations. For more details, visit www.onestopsourcinggroup.com.

Book a 30-minute call at www.onestopsourcinggroup.com