

Request to Transfer Coupon

Overview

Clients may request to transfer credit between accounts they manage. Reasons may include:

- Coupon was applied to wrong account
- Original account is closed
- Account has changed ownership

To process the transfer, the client must own/manage both accounts.

Tooling

- [Account Manager](#)
- [AEL](#)
- [Swizard](#)
- [Coupon Tool](#)

Identify the Problem

A client requests to transfer an active credit (coupon) to another account that they manage.

Investigate the Problem

1. Gather the following information:
 - Coupon code
 - Coupon string
 - Relevant account IDs
 - Client ID
2. Before submitting a credit transfer request, you must verify:
 - The client is an admin on both the original and recipient accounts.
 - The credit is currently active.
 - The group listed in AEL is **Fin Ops - Account Retention**.

3. Are all criteria met?
 - **YES** - Continue to **Implement the Solution**.
 - **NO** - Provide the appropriate CR and close the case.
 - If the client does not have an admin role on both accounts, send:
 - CR: **Deny Coupon Transfer Request - Non Admin**
 - If the credit is not currently active, send:
 - CR: **Deny Coupon Transfer Request - Inactive Request**
 - If the coupon is under a different group, the coupon is from another team. Send:
 - CR: **Deny Coupon Transfer Request – OOS**

Implement the Solution

1. In Swizard, go to the group: Coupons (Credits): Troubleshooting: FAQ
2. Create a new post in the group outlining the details of the request. Include:
 - Coupon code
 - Account IDs (original and recipient)
 - Amount to transfer
 - **IMPORTANT:** Do not share the **coupon string** in the group. You should only share the coupon code as shown in the **Coupon Tool > Code column**. The coupon code includes only numbers, whereas the coupon string includes numbers, letters, and symbols.
3. Publish the post.
4. Send the following CR to the client:
 - **Coupon Transfer Request - Submitted**

The SLA for a coupon transfer request is 4 business days. If the coupon hasn't been transferred within this time, the client may reach out again. If this happens, follow the **Escalation Path**.

Escalation Path

1. Go to the Account Manager tool.
2. In the search box, enter the **recipient** account ID.

3. In the left panel, click **Credits > Transfers**.
4. The coupon transfer will show as “Pending.”
5. Click the hyperlinked coupon code.
6. In the box that pops up, click **Escalate**.
7. From the dropdown menu, select **Delayed Transfer Request**.
 - This creates a new escalated case.
8. Send the client the CR: **Transfer Escalation**.
9. Close the original case as **Escalated**.

Related Resources

- [How to transfer a coupon](#) (Help Center)
- [Overview of account credits](#) (Help Center)
- [Account admin issues](#) (Help Center)