Escalating a Support Case

When you contact Support, a Support Agent gathers the details of the issue and opens a support case. Many issues are resolved at this stage. Some issues will not be resolved during the initial contact. If the case remains open, the technician will confirm the case priority and will provide an open case number to reference and an explanation of what action is being taken.

If the priority of the request needs to be updated, or the case is not being serviced according to your expectations for the priority, you may wish to escalate the case.

A case may be escalated through a phone call to your Support Organization. Requests for escalation are best placed during high availability hours. Placing a call for follow-up or escalation during normal working hours will result in immediate action on the case. Requests for follow-up or escalation placed outside normal working hours will be serviced during the next business day.

You may also escalate a case through the portal.

Begin by locating the existing open support case in My Cases.

Click on the Id to access the case detail:

Begin by adding a comment to the case that explains the need for escalation. Click Add Comment:

Enter a few short sentences explaining the need for escalation in the box marked *Comment*.

Click *Submit* to post the comment. Please be as specific as possible regarding the reason for the escalation. Suggestions include:

- Previously communicated deadlines have changed

- Extra work resulting from no work-around, or cumbersome work-around
- Number of staff or offices impacted by this issue
- Financial penalties resulting from this issue
- Legislative deadlines associated with this issue
- Issue may delay an upgrade, new server or new module go-live
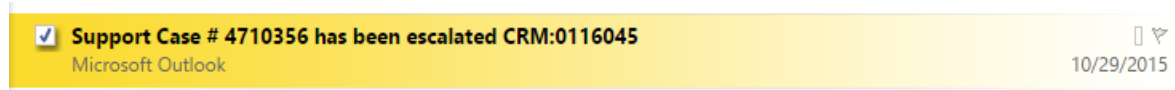- Issue is creating severe performance issues

Click the Escalate Case button:

Technical Support   Active – Open

Close Case   Escalate Case   Print

The escalated status now displays on the case detail screen:

Technical Support   Escalated   Active – Open

Close Case   Print

The system alerts the support representative via email to the request for escalation:

☑ **Support Case # 4710356 has been escalated CRM:0116045**
Microsoft Outlook   10/29/2015

The escalation is logged in the support case:

ACTIVITIES   NOTES

All ▾ | Add Phone Call   Add Task   •••

CRM Admin
Support Case # 3847386 has been escalated CRM:0116019
Today