

Overview

The solution uses parent-child processes to ensure every escalation is resolved completely.

Customer Escalation (Parent Process)

1. Escalation Title
2. Date Raised
3. Customer
4. Escalation Type
5. Severity
6. Description
7. Supporting Evidence
8. Primary Owner
9. Escalation Source
10. Action Items (Related Actions)

1. Raised
2. In Progress
3. Closed

Team	Status	Checkbox	Deleted Fields	Privacy Settings	Advanced Process Settings	Reminders	Layout	Notification Settings
⋮	1	Section	Basic Information				⚙	82343
⋮	2	Text	Escalation Title				⚙	82344
⋮	3	Date	Date Raised				⚙	82345
⋮	4	Linked Field	Customer				⚙	82346
⋮	5	Section	Escalation Details				⚙	82347
⋮	6	Picklist	Escalation Type				⚙	82348
⋮	7	Picklist	Severity				⚙	82349
⋮	8	Rich Text	Description				⚙	82350
⋮	9	File Upload	Supporting Evidence				⚙	82351
⋮	10	Section	Ownership & Accountability				⚙	82352
⋮	11	User	Primary Owner				⚙	82353
⋮	12	Picklist	Escalation Source				⚙	82354
⋮	13	Section	Related Actions				⚙	82368
⋮	14	Child Conversation	Action Items				⚙	82369

Customer Escalation - Resolution Tracker

Team	Status	Checklist	Deleted Fields	Privacy Settings	Advanced Process Settings	Reminders	Layout	Notification Settings
	Raised							
	In Progress							
	Closed							
+ Create new status								

Action Items (Child Process)

Fields Configured:

- 1. Action Description
- 2. Owner
- 3. Due Date

Status Flow:

- 1. Open
- 2. In Progress
- 3. Completed

Action Items

Team	Status	Checklist	Deleted Fields	Privacy Settings	Advanced Process Settings	Reminders	Layout	Notification Settings
	Open							
	In Progress							
	Completed							
+ Create new status								

Action Items

Team	Status	Checklist	Deleted Fields	Privacy Settings	Advanced Process Settings	Reminders	Layout	Notification Settings
	1	A text	Action Description					
	2	User	Owner					
	3	Date	Due Date					
+ Add Fields								

Relationship Between Processes

Customer Escalation and Action Items are linked via Related Actions in a parent-child structure.

End-to-End User Journey

- 1. Create Escalation – Status set to Raised
- 2. Add Action Items – Tasks assigned with owners and due dates

3. Execute Tasks – Status updated to Completed
4. Close Escalation – Only after all tasks are completed

Sample Execution

1. Escalation Title: Payment delay issue
2. Type: Billing Concern
3. Severity: High
4. Customer: Demo Customer

The screenshot shows a form for an escalation titled "Payment delay issue". The form includes the following fields:

- Escalation Title:** Payment delay issue
- Date Raised:** Jan 14, 2026
- Customer:** Demo customer
- Escalation Type:** Billing Concern
- Severity:** High
- Description:** Customer reports payment not reflected in 5 days.
- Primary Owner:** Vaibhavi Yadav
- Escalation Source:** Email
- Action Items:** Action Items #1: Investigate payment details

Below the form, there is a timeline of actions:

- You started Action Items #1: Investigate payment details (10:58 pm)
- You added related conversation TITLE1 Action Items #1: Investigate payment details (10:59 pm)
- You updated Action Items (10:59 pm)
 - Action Items
 - Action Items #2: Complaint of payment
- You started Action Items #2: Complaint of payment (10:59 pm)

Action Items:

1. Complaint about payment

The screenshot shows the "Action Items #2: Complaint of payment" checklist. The status is "COMPLETED" and the owner is "Vaibhavi Yadav". The checklist includes the following items:

- Action Description:** Payment is not completed.
- Owner:** Vaibhavi Yadav
- Due Date:** Jan 16, 2026

The checklist is marked as "COMPLETED" and the status is updated to "COMPLETED".

2. Investigate payment details

Customer Escalation - Resol... >

Action Items #1: **Investigate payment details** ☆

COMPLETED Vaibhavi Yadav 2 Tomorrow Normal More Checklist >

Jan 14, 2026

You started this conversation 10:58 pm

Viewing 5 updates

You added the TITLE1 Investigate payment details 10:59 pm

You set the due date to Jan 15, 2026 10:59 pm

VY You updated the checklist 11:03 pm

Action Description

Investigate why the customers payment has not been reflected in the system.

Owner

Vaibhavi Yadav

Due Date

Jan 15, 2026

In progress 11:04 pm

You updated status of the conversation Action Items #1: Investigate payment details to IN PROGRESS

Its completed 11:04 pm

You updated status of the conversation Action Items #1: Investigate payment details to COMPLETED

Action Description

Investigate why the customers payment has not been reflected in the system.

Owner

Vaibhavi Yadav

Due Date

Jan 15, 2026

Key Benefits

- Clear ownership
- Accountability
- Visibility
- Scalable design
- Structured workflow

Conclusion

The solution ensures systematic and transparent handling of customer escalations using Unifize.

Submitted by: Vaibhavi Yadav

