

# CUSTOMER ESCALATION – RESOLUTION TRACKER

## Overview

Customer Escalation – Resolution Tracker is a workflow solution built on Unifize to manage customer issues in a structured, transparent, and accountable manner.

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

## Processes Used

### Customer Escalation (Parent Process)

Fields Configured:

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)

Status Flow:

1. Raised
2. In Progress
3. Closed

Customer Escalation – Resolution Tracker						
Team	Status	Checklist	Deleted Fields	Privacy Settings	Advanced Process Settings	Reminders
Layout						
1	Section	Basic Information				83343
2	Text	Escalation Title				83344
3	Date	Date Raised				83345
4	Linked Field	Customer				83346
5	Section	Escalation Details				83347
6	Picklist	Escalation Type				83348
7	Picklist	Severity				83349
8	Rich Text	Description				83350
9	File Upload	Supporting Evidence				83351
10	Section	Ownership & Accountability				83352
11	User	Primary Owner				83353
12	Picklist	Escalation Source				83354
13	Section	Related Actions				83368
14	Child Conversation	Action Items				83369

[Add Fields](#)

## Customer Escalation - Resolution Tracker

The screenshot shows the 'Status' tab selected in the navigation bar. Below it, there are three status categories: 'Raised' (grey), 'In Progress' (blue), and 'Closed' (green). Each category has a settings icon and a trash icon. A button at the bottom left says '+ 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

The screenshot shows the 'Status' tab selected in the navigation bar. Below it, there are three status categories: 'Open' (grey), 'In Progress' (blue), and 'Completed' (green). Each category has a settings icon and a trash icon. A button at the bottom left says '+ Create new status'.

### Action Items

The screenshot shows the 'Fields' tab selected in the navigation bar. It displays three fields:

- 1. Action Description (Text field, green background)
- 2. Owner (User field, pink background)
- 3. Due Date (Date field, orange background)

Each field has a label and a value. To the right of each field is a trash icon and a number (83365, 83366, 83367). A button at the bottom left says '(+) 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 step-by-step process of creating an escalation record:

- 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
  - Action Items #2: Complaint of payment

Timeline events shown at the bottom:

- You started Action Items #1: Investigate payment details (10:59 pm)
- You added related conversation TITLE1 Action Items #3: 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 creation of a new task and its status update:

**Action Items #2: Complaint of payment**

Task details:

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

Timeline events shown at the bottom:

- You started this conversation (10:59 pm)
- You set the due date to Jan 16, 2026 (11:00 pm)
- You updated the checklist (11:00 pm)
  - Action Description: Payment is not completed.
  - Owner: Vaibhavi Yadav
  - Due Date: Jan 16, 2026
- It is completed. (11:00 pm)
- You updated status of the conversation Action Items #2: Complaint of payment to COMPLETED

## 2. Investigate payment details

The screenshot shows a customer escalation record titled "Action Items #1: Investigate payment details". The status is "COMPLETED". The record was created by Vaibhavi Yadav at 10:58 pm on Jan 14, 2026. It has 2 attachments and is set to "Normal". A "Checklist" button is visible.

The checklist details:

- Action Description: Investigate why the customers payment has not been reflected in the system.
- Owner: Vaibhavi Yadav
- Due Date: Jan 15, 2026

Updates:

- You started this conversation at 10:58 pm on Jan 14, 2026.
- You added the title "Investigate payment details" at 10:59 pm on Jan 14, 2026.
- You set the due date to Jan 15, 2026 at 10:59 pm on Jan 14, 2026.
- You updated the checklist at 11:00 pm on Jan 14, 2026. Action Description: Investigate why the customers payment has not been reflected in the system. Owner: Vaibhavi Yadav. Due Date: Jan 15, 2026.
- In progress at 11:04 pm on Jan 14, 2026. You updated status of the conversation Action Items #1: Investigate payment details to IN PROGRESS.
- Its completed at 11:04 pm on Jan 14, 2026. You updated status of the conversation Action Items #1: Investigate payment details to COMPLETED.

### 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

