How to Escalate a Support Case to Critical - Business Management

05/11/2026 10:30 am EDT

Step 1 – Once you have read through or spoke to the customer and confirmed the Support Case should be escalated to Critical status, first update the "Priority" of the case to read "1- Critical" , then edit the "Impact" to read "Critical", as well and hit "Save" to ensure all changes are made.

"Priority" rating is how we internally describe the urgency of the case. "Impact" is how the customer describes the urgency of the case.

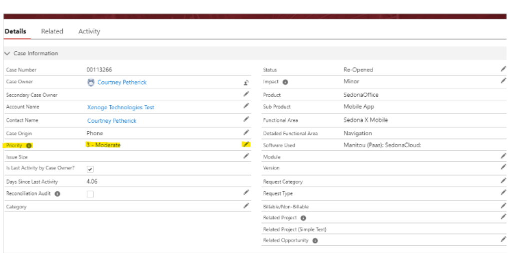
Below is an overview of our priority structure, which guides how we triage and manage all incoming cases:

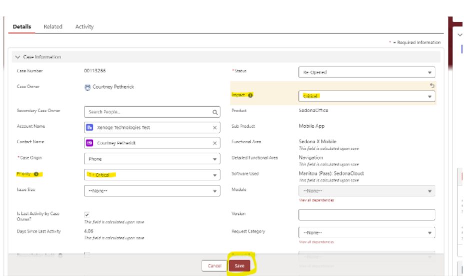
Priority 4 – Low (Info)
Issues that do not affect product functionality or the user's ability to work. These typically involve how-to questions, feature requests, or non-urgent feedback.

Priority 3 – Moderate (Minor)
Issues affecting a single user without significantly impacting their ability to use the product. Examples include minor bugs, isolated performance issues, or configuration assistance.

Priority 2 – High (Major)
Issues where a major feature or service is impaired, impacting productivity for multiple users or delaying an upcoming implementation milestone. Workarounds may exist but are not ideal.

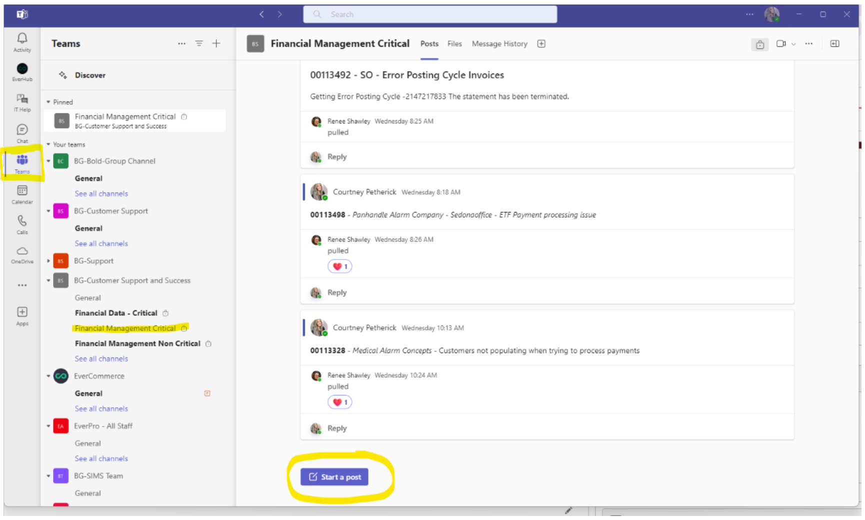
Priority 1 – Critical
Issues involving total system failure, life-safety concerns, significant data loss, or the inability for **any** users to perform essential functions. These require immediate attention, as no workaround is available.





Step 2 – Report the Critical case to the Critical Chat thread in Teams.

A) Go to Teams on the left sidebar in the Teams app > Click "Financial Management Critical" under "BG – Customer Support and Success" > Click "Start a post"

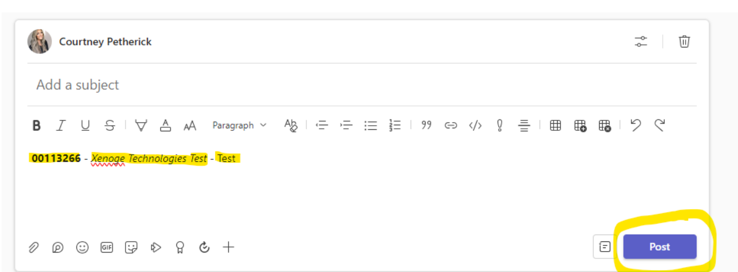


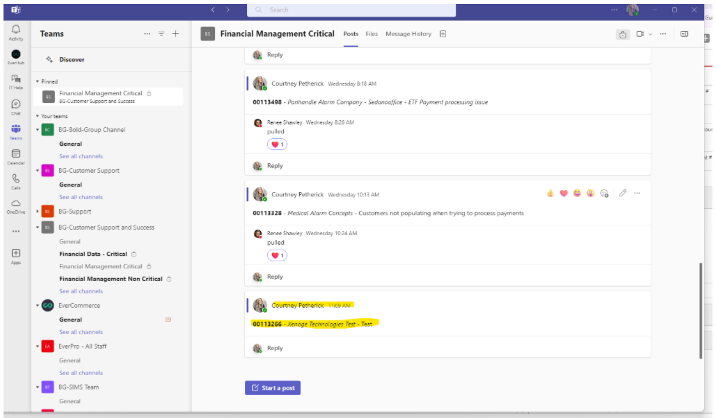
B) – Enter the following Case information and hit "Post":

- Case Number

- Account Name/Customer Name

- Subject of Case





The case has now been escalated as a Critical Case, and the technician who is working on Critical cases will be able to see it on the Teams Critical thread and address it as soon as possible. It does not need to be assigned to a specific technician; it remains in the case queue and will be picked up by the technician who is working Criticals at that time.

If you have completed baseline troubleshooting, please ensure to detail those in the Steps to Reproduce and you may place in the appropriate L2 queue.