

NovaDesk Case Triage Quick Guide

Use this guide to choose a case category, escalation priority, and routing queue before you submit a support case.

1. Identify the issue What is the customer actually reporting?	2. Choose priority How quickly could harm or service impact increase?	3. Route the case Send it to the team that owns the issue.
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Quick decision table

Customer situation	Category	Priority	Route to
Routine billing question, duplicate charge, invoice correction	Billing	Standard	Billing
Payment problem may interrupt service soon or requires same-day attention	Billing	Urgent	Billing
Routine login problem, feature question, single-user technical issue	Technical Support	Standard	Technical Support
Service is unavailable for a customer and work is blocked	Technical Support	Urgent	Technical Support
Widespread outage or business-critical function is unavailable	Technical Support	Critical	Technical Support
Unexpected password-reset notice, suspicious sign-in, or unrecognized account activity	Account Security	Urgent	Account Security
Confirmed active takeover, attacker changing account details, or immediate loss of account control	Account Security	Critical	Account Security

Priority guide

STANDARD Routine issue. No immediate security, financial, or service risk.	URGENT Time-sensitive issue. Risk or service impact could increase if not handled quickly.	CRITICAL Active compromise, major outage, or immediate high-impact risk.
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Document the case clearly

A good case note records what the customer reported, what they do or do not recognize, and any immediate impact. Write facts - not assumptions. Do not add details the customer did not provide.

Weak note	Better note
Customer has a security problem.	Customer reports an unexpected password-reset notification and does not recognize the activity.
Billing issue.	Customer reports a duplicate charge on the current invoice and requests review.
App is broken.	Customer reports being unable to sign in after multiple attempts; other account functions were not tested.

Before you submit

✓	Customer record is correct.
✓	Category matches the customer’s main issue.
✓	Priority reflects the actual level of risk or service impact.
✓	Case note states the customer’s report clearly and factually.
✓	Queue matches the team that should own the case.
✓	Escalation review is accurate before submission.

When you are unsure: choose the category that best matches the customer's primary issue, use the lowest priority that accurately reflects the risk, document the facts, and use Nova or your team’s escalation process for additional guidance.

Training reference - NovaDesk simulation. Categories, priorities, and routing examples are for the ResolveIQ portfolio demonstration.