

# Triage Guide — Customer Relations

SAMPLE DOCUMENT — FOR TRAINING PURPOSES ONLY

## Triage Reference Guide — Customer Relations

### Urgency Criteria

Urgency is driven by SLA timers and customer impact. Breached SLAs are always urgent. Multiple items from the same source may indicate a systemic issue.

### Priority Scale (SLA\_Hours\_Remaining)

- **1-4 hours:** URGENT — act now
- **5-12 hours:** ATTENTION — act today
- **13-48 hours:** ROUTINE — schedule this week
- **48+ hours:** LOW — monitor

### Categories

- **Terminal**
- **Settlement**
- **Pricing**
- **Onboarding**
- **General Enquiry**

### Status Values

- **Open**
- **Pending**
- **Escalated**
- **Waiting**

### Escalation Rules

1. Any item categorised as URGENT that has been in queue for more than 24 hours
2. Multiple items from the same source or merchant (pattern indicates systemic issue)
3. Items with contradictory data (status says one thing, priority says another)
4. Items you cannot categorise with the information available

### The 5 Failure Modes (check your output)

1. **Miscalculation** — Are the counts in your summary correct? Count manually.
2. **Misclassification** — Did the AI put ambiguous items in the right category?
3. **Hallucinated references** — Do any links, IDs, or cross-references actually exist?
4. **Overconfident language** — Does the output say "definitely" when it means "likely"?
5. **Missing context** — What do you know from experience that the data doesn't show?