Billing escalation

Use this when a customer reports invoice, plan, payment, renewal, tax, or billing contact problems.

Triage checklist

- Collect account ID, invoice number, billing email, current plan, requested change, and urgency.
- Confirm whether the request blocks product access or is an administrative correction.
- Ask whether the billing contact, payment method, tax details, or purchase order changed recently.
- Do not promise credits, refunds, discounts, or contract changes without finance approval.

Escalation signal

Escalate to finance operations when the customer is blocked, the invoice is disputed, the payment failed on an active account, or the request changes commercial terms.

Output

Summarize customer, invoice or account reference, requested change, urgency, evidence collected, and finance owner.