

Shift4 Customer Support & Escalation Flow	Department	Sales
	Document No. & Version	6.9
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GOAL

- Help the merchant reach the correct Shift4 team quickly.
- Maintain clear documentation so the case can be escalated if needed.

INFORMATION TO COLLECT FIRST (REQUIRED)

A) Scope

- Who is impacted (single user, single device, whole site, all locations).

B) Issue category

- Outage / cannot take payments
- POS app / device / peripheral
- Installation / go-live / site readiness
- Billing, fees, statements, chargebacks
- Portal access (Lighthouse / My Portal)

C) Copy/paste details

- Merchant name and location
- MID (and TIDs if applicable)



- Best callback name, phone, and email
- What changed recently (new router, update, new device, new menu, etc.)
- Exact symptoms and steps to reproduce
- Photos/screenshots with timestamps
- Any error codes/messages

STANDARD SUPPORT FLOW (USE THIS FIRST)

- Shift4 expects the standard support process to be followed before requesting any escalation.

Step 1: Check Shift4 system status

- System Status Alerts: shift4payments.statuspage.io

Step 2: Use the knowledge base for how-to and common troubleshooting

- Shift4 Knowledge (Zendesk): shift4.zendesk.com

Step 3: Open a Shift4 Support case (preferred)

- Shift4 Support (24/7/365): shift4.com
- Chat or ticket is preferred when possible so there is a written trail.

Step 4: Document the case

- Case number
- Support agent name
- Date/time opened



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- Promised next step and ETA

Step 5: Keep all follow-ups inside the same case

- Avoid opening multiple tickets for the same issue.

WHICH CHANNEL TO USE (QUICK DECISION GUIDE)

A) Payments down / urgent

- Contact Shift4 Support immediately.
- Main support phone referenced in internal materials: **888.276.2108** (follow prompts).
- Open and maintain a case whenever possible.

B) How-to / training / “where is the button”

- Start with Zendesk articles first.

C) Installation / go-live / site readiness

- Contact Shift4 Support and route through installation-related support when applicable.
- Installation readiness context and contacts are documented in the Customer Site Readiness Guide (internal).

D) Legal / contract / terms

- Reference official Shift4 documents and avoid interpretation.
- Shift4 Legal hub: shift4.com



ESCALATION RULES (DO NOT BYPASS SUPPORT)

- Do not skip the standard support path, even if a Partner Manager or Relationship Manager is available.

Escalation checklist (must be true)

- The case is at least 24 hours old.
- The case is well documented (notes, reports, screenshots, steps to reproduce).
- The merchant or representative has actively worked with Shift4 Support within the last 24 hours.
- Shift4 has had reasonable time to act on the most recent information.
- The merchant is prepared to respond to follow-up.
- The best contact information is available.

HOW TO REQUEST ESCALATION (REP WORKFLOW)

Step 1: Confirm the escalation checklist is complete

- Verify the checklist above is true before escalating.

Step 2: Prepare an “Escalation Packet” (copy/paste)

- Case number and date opened
- One- to two-sentence summary
- Business impact (what is blocked)



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- Troubleshooting already attempted
 - Screenshots/photos and any relevant device details
 - Best contact info and best time to reach the merchant

Step 3: Request escalation through the approved internal path

- Do not contact Shift4 leadership directly unless instructed.

Step 4: Keep the original Shift4 case updated

- The original case should remain the single source of truth.

REP GUARDRAILS (COMMON MISTAKES TO AVOID)

- Do not open multiple tickets for the same issue.
- Do not pause a working support case while waiting for escalation.
- Do not promise timelines, credits, or fee reversals.
- Do not share or store cardholder data, CVV, track data, or merchant credentials.

REMINDER

- Strong documentation (screenshots, ticket numbers, steps to reproduce) is what makes escalations work.



Change Log			
Date	Description of Change	Comments	Initiated By

