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UNITED STATES
POSTAL SERVICE

January 25, 2022

Mr. Ivan D. Butts
President
National Association of Postal Supervisors
1727 King St., STE 400
Alexandria, VA 22314-2753

Certified Mail Tracking Number:
7019 2280 0001 6260 6961

Dear Ivan:

As a matter of general interest, the Postal Service has updated the training course for the application titled, Customer 360 (C360).

The C360 application provides employees who handle customer inquiries all the necessary information to provide effective and efficient assistance.

The updated training will help users navigate through the C360 application to complete their day- to-day activities more effectively. Training sessions for users will be facilitator led via Zoom and scheduled between February 1 and March 31.

Enclosed on compact disc is the following training material:

- Customer 360 (C360) Navigation Guide, *Train the Trainer*, *Back to Basics, District Users*

Please contact Dion Mealy at 202-507-0193 if you have any questions concerning this matter.

Sincerely,

Shannon R. Richardson
Director
Contract Administration (APWU)

Enclosure

475 L'ENFANT PLAZA SW
WASHINGTON DC 20260-4100
WWW.USPS.COM

(CA2018-283)

Customer 360 (C360) Navigation Guide

Train the Trainer

Back to Basics

District Users

UNITED STATES POSTAL SERVICE ®

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Customer 360

INTRODUCTION

This guide will help you navigate through the C360 application to complete your day-to-day duties effectively.

Here's a C360 Overview Video! (CC)

Definitions

Customer 360

What is the role of the Customer 360 team?

The CRM Platform Management group functions as the business owner of the Postal Service's Customer Relationship Management system (C360) for customer interactions associated with complaints and inquiries. In this role, the group develops business processes, coordinates defect resolution, manage system enhancements, administers nationwide training and provides reporting visibility to all levels of the organization.

What is the role of Consumer Affairs?

The Consumer Affairs team is crucial in helping us meet and maintain the goals of delivering an exceptional customer experience. The Consumer Affairs team provides policy and processes users follow to develop quality customer resolutions.

Mission Statements

Customer 360

Customer 360

Our mission is to manage and optimize the Customer Relationship Management platform that provides stakeholders a unified view of our customers. We leverage C360 technology to improve the Customer Experience by identifying gaps, managing and implementing solutions, optimizing reporting capabilities that provide actionable data, and enabling communication between C360 users and other functional areas throughout the organization.

Consumer Affairs

Managers of Consumer Affairs develop and monitor policy and processes to ensure Field offices can integrate corporate initiatives to drive efficiency and performance management strategies designed to improve the customer experience. They are the primary field customer support function that serves as a vital link to the customer.

Person Account Process

Person Account Process (Existing Person Account)

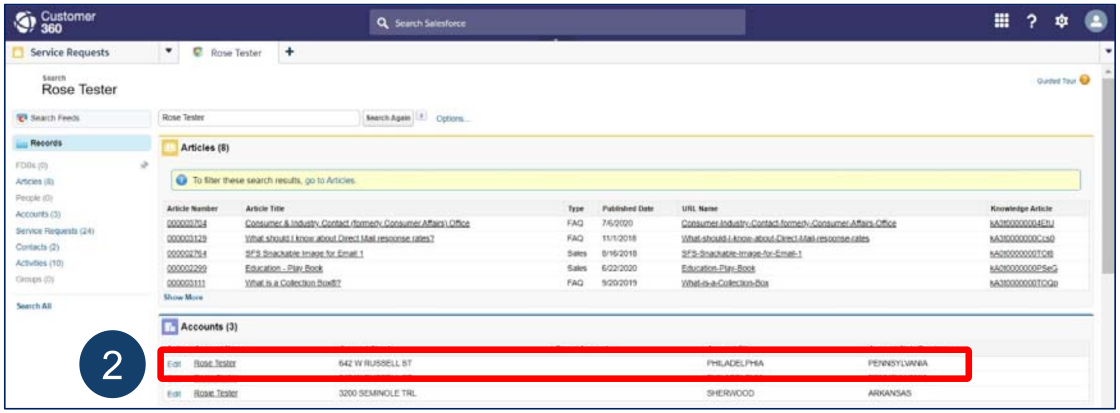
Customer 360

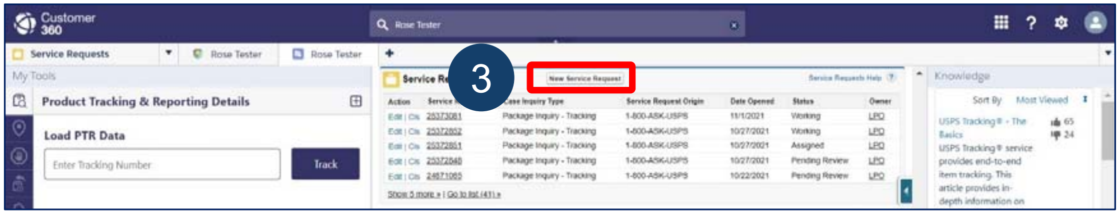
When LPO, Consumer Affairs, and Headquarters users need to create a Service Request for a customer with an existing Person Account, they should follow the steps below.

1. Search for customer's name in the global search bar.

2. If customer's name and account exist, select their name in order to open their Person Account.

3. In their Person Account, scroll down to the Service Request section and select "New Service Request" to create new Service Request.



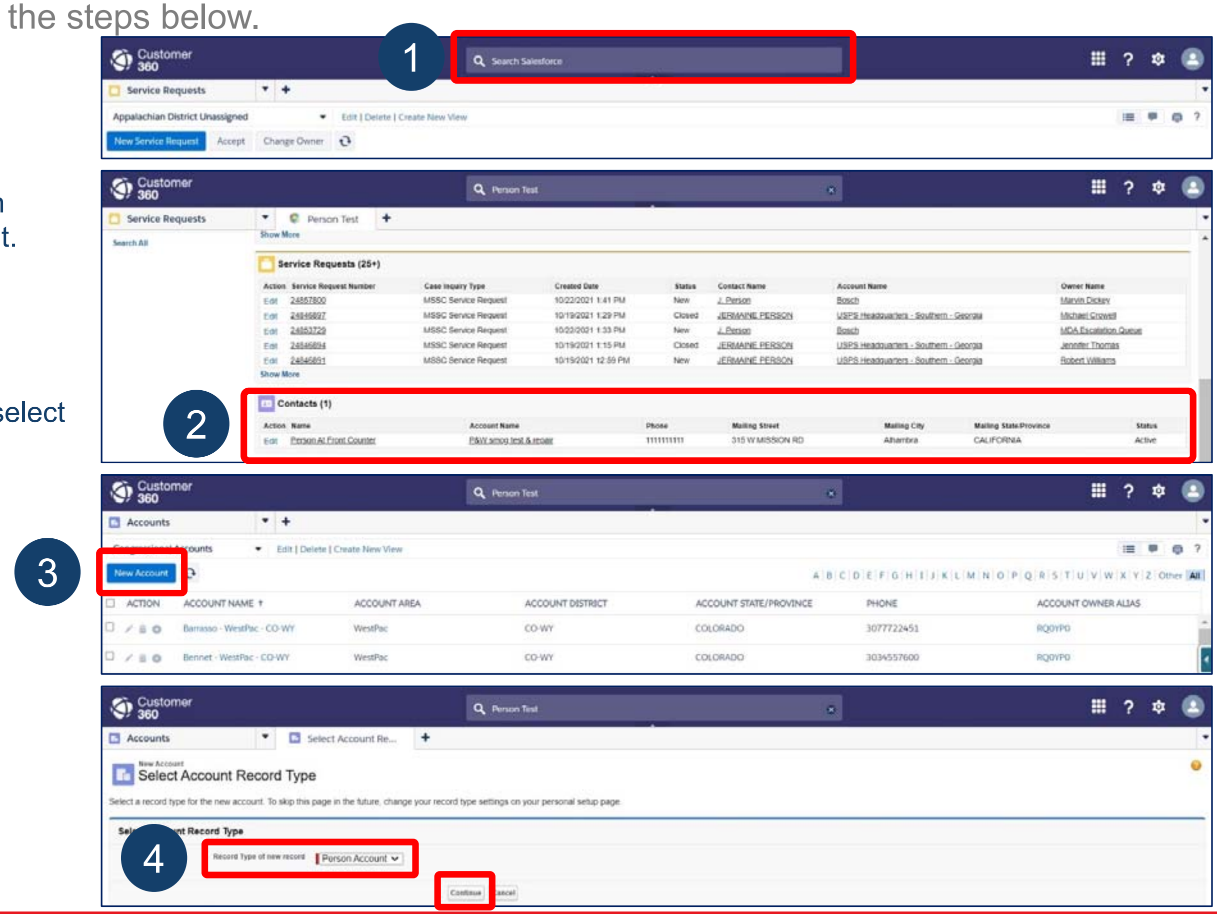


Searching for a Person Account first reduces mistakes made when creating Service Requests and improves the information C360 contains by reducing duplicate accounts.

Person Account Process (New Person Account)

When LPO, Consumer Affairs, and Headquarters users need to create a Service Request for a customer who does not have a Person Account, they should follow the steps below.

1. Search for customer's name in the global search bar.
2. If searching for a customer's name does not display an existing account, you will need to create a new account.
3. Navigate to the "Accounts" list view and select "New Account".
4. Set the account record type as "Person Account" and select "Continue".

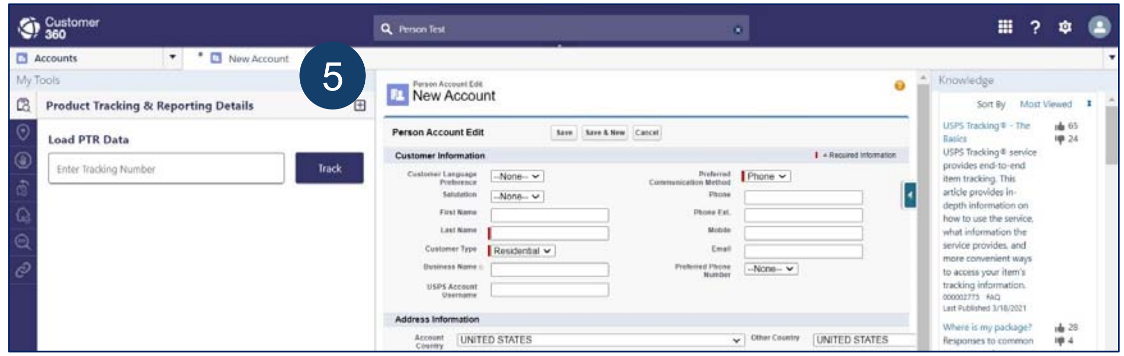


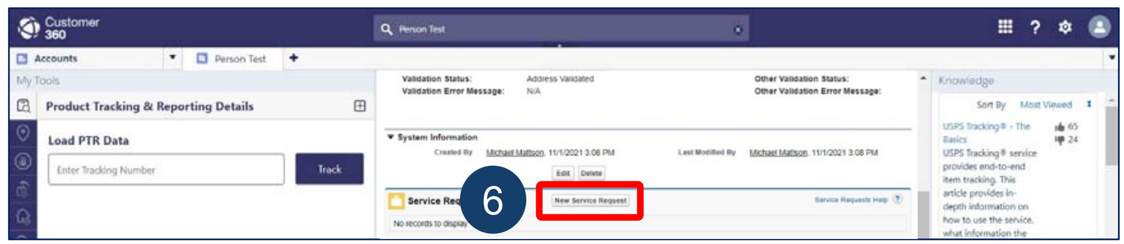
Person Account Process (New Person Account)

When LPO, Consumer Affairs, and Headquarters users need to create a Service Request for a customer who does not have a Person Account, they should follow the steps below.

5 Gather customer's contact information and enter it into the new account form. Select "Save".

6 In their Person Account, scroll down to the Service Request section and select "New Service Request" to create new Service Request.





All customer records in Customer 360 must have a preferred communication method. In step 5, while gathering the customer's information, make sure to select the customer's preferred communication method (phone or email) from the appropriate drop down before selecting "Save". It is important to use a customer's preferred communication method when making initial contact, so it is critical this information is documented during account creation.

Customer 360

Service Request Origins & Routing Rules

Service Request Creation & Routing

Service Requests are created in C360 through a variety of customer interaction channels and routes to Local Post Offices and Consumer Affairs Offices based on inquiry type and defined criteria.

Customer via Email Us Page on USPS.com

Service Request Origin: *Email*

Care Center Agent

Service Request Origin: *1-800-ASK-USPS*

LPO/CAO

Service Request Origin: *In Person/Phone*

Customer 360

Other Service Request Origins

- Chat
- HQ ELT/BOG/PMG
- OIG
- PRC Inquiry
- Letter
- Congressional Inquiry
- SMS
- IVR Self-Service

Local Post Office

- Daily Mail Service
- Facility
- Hold Mail
- Package Pickup
- Premium Forwarding Service
- Redelivery

Routed Based on Issue Details*

- Change of Address
- Package Inquiry
- Personnel

Consumer Affairs Office

- Business
- SR Origin: Congressional Inquiries
- All Reopened Service Requests
- Package Inquiries:
  - Cremated Remains
  - Live Animals
  - Prescription Medication

* See APPENDIX for detailed routing rules

Service Request Milestones

Customer 360

Service Request Milestones are consistent for most Service Request types with few exceptions.

Service Request Type	Service Level Agreement (SLA)
Regular Service Requests • Business Inquiry • Change of Address • Daily Mail Service • Facility • Hold Mail • Package Inquiry • Cremated Remains* • Package Pickup • Personnel • Premium Forwarding Service • Redelivery	• Initial Contact is due within 1 working day of creation. • Resolution is due 3 working days from the date created. * Cremated Remains follow regular Package Inquiry SLA but are routed to the Cremated Remains queue and receive additional email alerts when SLAs are not met.
Escalated Service Request Origin • Congressional	• Initial Contact is due within 1 working day of creation. • Resolution is due 3 working days from the date created. • ***Note:*** *Congressional Service Requests are routed to the Congressional queue and receive additional email alerts.*

Escalated Service Request Origin
• ELT/BOG/PMG
	• Initial Contact:
	    • If the Service Request is created before noon, initial contact is due by 5pm the same day.
	    • If created after noon, initial contact is due before noon the next working day.
	• Resolution: Due 2 working days from date created.

Worked by Care Center ONLY • GXG Escalation • Technical Inquiry • Stamps Fulfillment Service	• Initial Contact is due within 1 working day of creation. • Resolution is due 3 working days from the date created.

NOTE:
- When a Service Request is reopened, both the Initial Contact and Resolution SLA Milestones will reset to 1 working day and 3 working days, respectively.
- Initial Contact and Resolution milestones will be adjusted and will *not be due* on federal holidays.
- General Inquiry Service Requests do not have SLAs because they auto-close.

Customer 360

Knowledge Check

Scenario:

If a customer escalates a problem they're having with USPS to a staffer at their local Congressional Office, what is the Service Request origin and where will it route?

Select answer:

1. Congressional Inquiry, Congressional Queue to the Constituent's District Consumer Affairs Office
2. Congressional Inquiry, HQ CAO Office
3. Congressional Inquiry, Congressional Queue to the Congressional Staffer's District Consumer Affairs Office

1/2

Customer 360

Knowledge Check

Scenario:

If a customer escalates a problem they're having with USPS to a staffer at their local Congressional Office, what is the Service Request origin and where will it route?

Select answer:

1. Congressional Inquiry, Congressional Queue to the Constituent's District Consumer Affairs Office
2. Congressional Inquiry, HQ CAO Office
3. Congressional Inquiry, Congressional Queue to the Congressional Staffer's District Consumer Affairs Office

2/2

Customer 360

Knowledge Check

Scenario:

What are the Initial Contact and Resolution deadlines for ELT/BOG/PMG Service Requests?

Select answer:

1. Initial Contact: Due within 1 working day of creation
   Resolution: Due 3 working days from the date created.
2. Initial Contact: If the Service Request is created by noon, 5pm the same day. If created after noon, the next working day by noon. Resolution: 2 working days from created date
3. Initial Contact: 5pm the next working day.
   Resolution: 2 working days from created date

1/2

Customer 360

Knowledge Check

Scenario:

What are the Initial Contact and Resolution deadlines for ELT/PMG/BOG Service Requests?

Select answer:

1. Initial Contact: Due within 1 working day of creation
   Resolution: Due 3 working days from the date created.
2. Initial Contact: If the Service Request is created by noon, 5pm the same day. If created after noon, the next working day by noon. Resolution: 2 working days from created date
3. Initial Contact: 5pm the next working day.
   Resolution: 2 working days from created date

2/2

Knowledge Check

Scenario:

If a customer calls a C360 Customer Care Agent to create a Daily Mail Service Request, what is the Service Request Origin and where will it route to?

Select answer:

1. Origin: 1-800-ASK-USPS, Route to: Consumer Affairs Office
2. Origin: In Person/Phone, Route to: Local Post Office
3. Origin: 1-800-ASK-USPS, Route to: Local Post Office
4. Origin: IVR Self Service, Route to: Consumer Affairs Office

1/2

Knowledge Check

Customer 360

Scenario:

If a customer calls a C360 Customer Care Agent to create a Daily Mail Service Request, what is the Service Request Origin and where will it route to?

Select answer:

1. Origin: 1-800-ASK-USPS, Route to: Consumer Affairs Office
2. Origin: In Person/Phone, Route to: Local Post Office
3. Origin: 1-800-ASK-USPS, Route to: Local Post Office
4. Origin: IVR Self Service, Route to: Consumer Affairs Office

2/2

Customer 360

Knowledge Check

Scenario:

If a Service Request is forwarded by email from the Office of the Inspector General to USPS, what would you select for the Service Request Origin field?

Select answer:

1. HQ ELT/BOG/PMG
2. OIG
3. District Consumer Affairs Office
4. Email Us

1/2

Customer 360

Knowledge Check

Scenario:

If a Service Request is forwarded by email from the Office of the Inspector General to USPS, what would you select for the Service Request Origin field?

Select answer:

1. HQ ELT/BOG/PMG
2. OIG
3. District Consumer Affairs Office
4. Email Us

2/2

Customer 360

District Home Page

Consumer Affairs C360 Access

Customer 360

Employees that work at a Consumer Affairs (CA) office, access Customer 360 directly via the C360 URL.

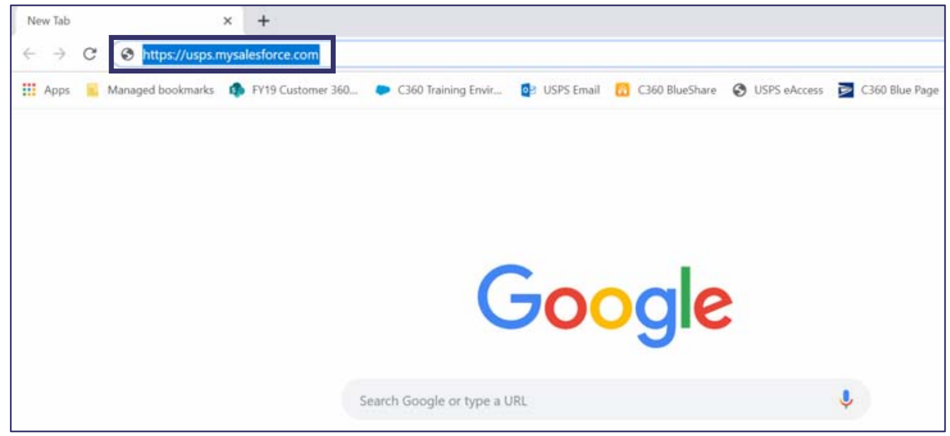
Accessing Customer 360 from Browser

1. Access the Google Chrome icon on your computer desktop.
2. Enter the following URL in your browser: https://usps.my.salesforce.com.
3. Select the **USPS ACE Login** button to access C360.

Note: Selecting the button will automatically sign you in to C360.

1

2



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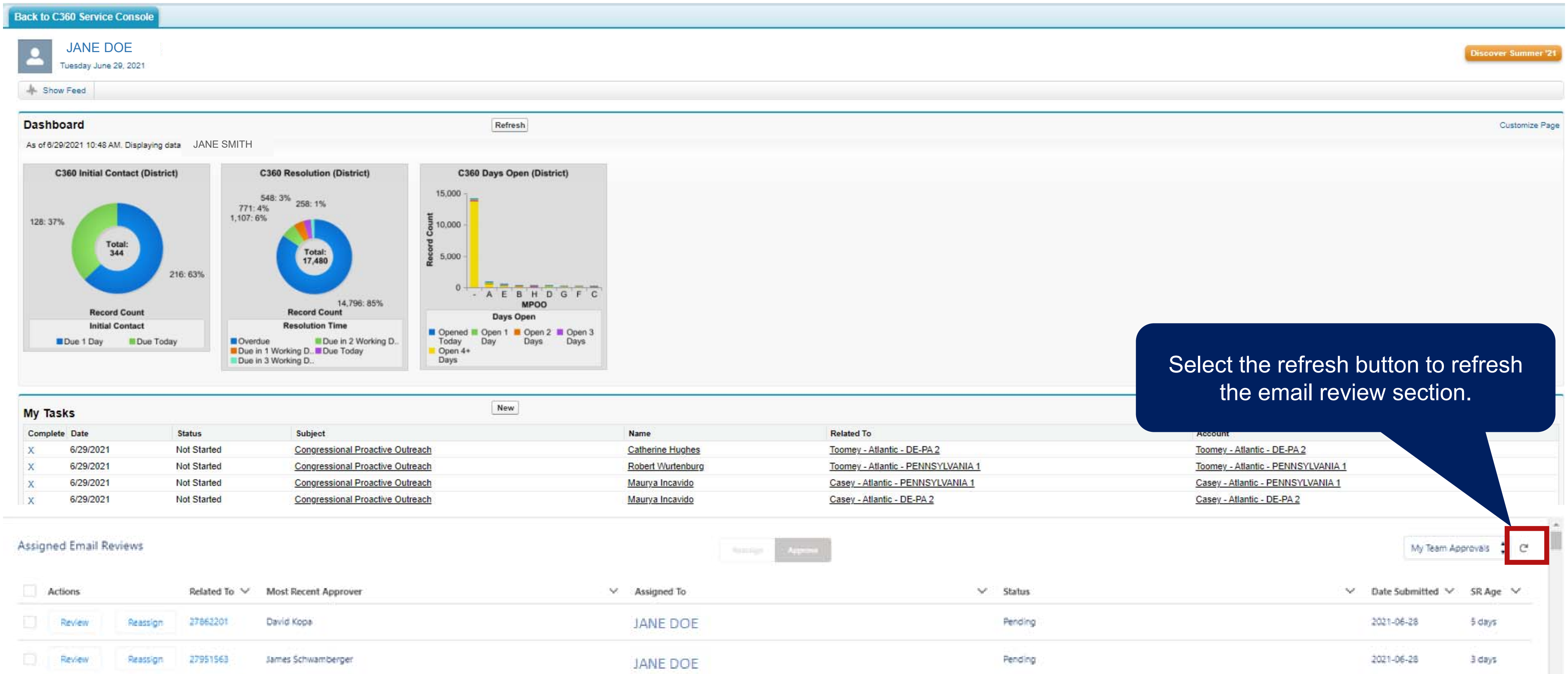
Consumer Affairs C360 Home

Customer 360

The "Home" page includes charts, tasks and assigned Email Reviews.



Select the refresh button to refresh the email review section.

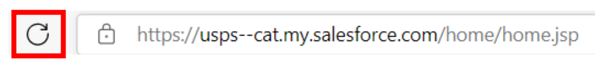
Customer 360

Knowledge Check

Scenario:

How do you refresh the “Assigned Emails Review” queue?

Select answer:

1. Select the refresh icon beside the text bar on your internet browser: 

2. “Assigned Email Reviews" queue will refresh automatically every 5 minutes
3. Select the refresh icon beside the dropdown picklist: 

4. "Assigned Email Reviews" queue is always refreshed

1/2

Knowledge Check

Scenario:

How do you refresh the “Assigned Emails Review” queue?

Select answer:

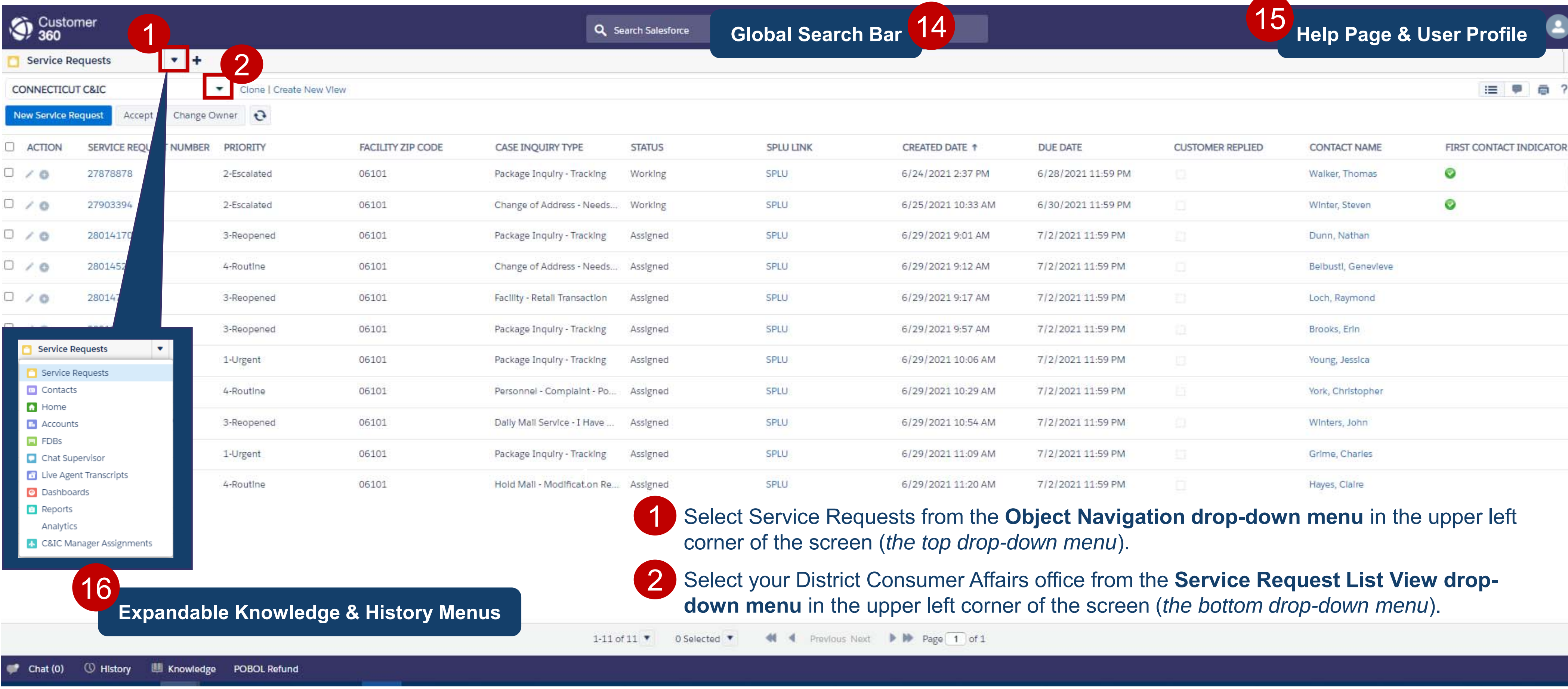
1. Select the refresh icon beside the text bar on your internet browser: https://usps--cat.my.salesforce.com/home/home.jsp
2. “Assigned Email Reviews" queue will refresh automatically every 5 minutes
3. Select the refresh icon beside the dropdown picklist: My Team Approvals
4. "Assigned Email Reviews" queue is always refreshed

2/2

District Service Request List View

Consumer Affairs Service Request List View

The Service Request (Service Request) List View summarizes key Service Request details, actions, and indicators.



1. Select Service Requests from the **Object Navigation drop-down menu** in the upper left corner of the screen (*the top drop-down menu*).
2. Select your District Consumer Affairs office from the **Service Request List View drop-down menu** in the upper left corner of the screen (*the bottom drop-down menu*).

* See APPENDIX for the Service Request List View legend.

Standard C360 Service Request List Views

Customer 360

There are seven standard C360 List Views for Consumer Affairs teams.

LIST VIEW	DESCRIPTION
District C&IC Ex: CAPITAL C&IC	Service Requests assigned to your Consumer Affairs office that are open.
District C&IC All District Offices Ex: CAPITAL C&IC All District Offices	All Service Requests assigned to facilities in your District. This view also only for open Service Requests.
My Open Service Requests	Service Requests assigned to you (you are the Service Request Owner).
Recently Viewed Service Requests	Most recently accessed Service Requests (up to 200). Service Requests are ordered from most recently viewed at the top to those viewed longest ago at the bottom.
Cremated Remains	All Cremated Remains Service Requests assigned to your District.
ELT/BOG/PMG	All HQ Escalated (ELT, BOG, & PMG) Service Requests assigned to your District.
Congressional	All Congressional Inquiry Service Requests assigned to your District.

C360 will not allow you to edit the standard List Views, however, you can clone them and make updates to the cloned version.

Here's a video on how to create new list views!

Customer 360

Managing Workload

Service Request Priority

Priority is based on the contents of the package. There are four Service Request priorities in Customer 360:

PRIORITY	DESCRIPTION
1-Urgent	*Note: This is a highly sensitive topic, and the SOP must be followed. Please view the* Consumer Advocate Website *for more* information. – ***WHY IS THIS NOTE HERE?*** The Customer 360 system updates the Priority to 1-Urgent when the Contents of Mail Piece for a Package Inquiry Service Request is one of the following: 1. Cremated Remains 2. Live Animals 3. Prescription Medication
2-Escalated	The Customer 360 system updates the Priority to 2-Escalated when an escalation is submitted. Service Requests can be escalated for two reasons: 1. The LPO cannot resolve the Service Request 2. The customer called the Care Center about the Service Request and business rules mandate escalation by the Customer Care Agent (i.e. Service Request has not had Initial Contact after 1 business day)
3-Reopened	The Customer 360 system updates the Priority to 3-Reopened when a Service Request was previously Closed and is reopened. These Service Requests are automatically escalated to the Consumer Affairs Office.
4-Routine	Most Service Requests in Customer 360 are Routine. These Service Requests route to the Local Post Offices.

Priority is auto-assigned to each Service Request using business rules that assign priority based on information provided about the contents of the mail piece. Priority should not be manually changed by C360 users.

Service Request Initial Contact Indicator

Customer 360

On your Service Request List View, Initial Contact indicators are based on Service Level Agreement (SLA). Prioritize Service Requests using the Initial Contact Indicators:

ORDER OF OPERATIONS	INITIAL CONTACT INDICATOR	DESCRIPTIONS
1	!	Initial Contact SLA Milestone was missed. Work red Service Requests first.
2	!	Initial Contact SLA Milestone is due today.
3	Blank Indicator (No Icon)	Initial Contact SLA Milestone is due the next business day.
4	i	Initial Contact SLA Milestone was completed after the one business day commitment.
5	✓	Initial Contact SLA Milestone was completed on time.

Customer 360

Knowledge Check

Scenario:

If you are trying to locate an open Package Inquiry Service Request assigned to a facility in your district, what list view would you look in and what priority number would you expect to see?

Select answer:

1. My Open Service Requests – 2 - Escalated
2. District C&IC All District Offices - 4- Routine
3. District C&IC – 4 - Routine
4. Recently Viewed Service Requests – 2 - Escalated

1/2

Customer 360

Knowledge Check

Scenario:

If you are trying to locate an open Package Inquiry Service Request assigned to a facility in your district, what list view would you look in and what priority number would you expect to see?

Select answer:

1. My Open Service Requests – 2 - Escalated
2. District C&IC All District Offices - 4- Routine
3. District C&IC – 4 - Routine
4. Recently Viewed Service Requests – 2 - Escalated

2/2

Customer 360

Knowledge Check

Scenario:

If you are trying to locate an open Cremated Remains Service Request, what list view would you look under and what priority number would you expect to see?

Select answer:

1. Cremated Remains and 2 - Escalated
2. District C&IC All District Offices and 1 - Urgent
3. Cremated Remains and 1 - Urgent
4. District C&IC All District Offices and 2 - Escalated

1/2

Knowledge Check

Scenario:

If you are trying to locate an open Cremated Remains Service, what list view would you look under and what priority number would you expect to see?

Select answer:

1. Cremated Remains and 2 - Escalated
2. District C&IC All District Offices and 1 - Urgent
3. Cremated Remains and 1 - Urgent
4. District C&IC All District Offices and 2 - Escalated

2/2

Customer 360

Service Request Lifecycle

Service Request Status Lifecycle

There are nine Service Request Statuses in Customer 360:

New

The default status of a Service Request before it is routed.

Assigned

The C360 system updates the status to Assigned when a Service Request has been routed to a facility.

Working

The C360 system updates the status to Working after Initial Contact has been made.

Resolved

The C360 system updates the status to Resolved when a user logs a Resolution Reason and a Root Cause.

Closed

The C360 system updates the status to Closed when resolution contact is made and documented or a response is sent to the customer after Customer Replied status.

Conditional Statuses

Collaborating

The C360 system updates the status to Collaborating when a user Requests Assistance on a Service Request.

Pending Review

The C360 system updates the status to Pending Review when a user submits an email to be reviewed by the Consumer Affairs office.

Rejected

The C360 system updates the status to Rejected after the Service Request is in Pending Review status and when a Consumer Affairs user rejects an email submitted for review.

Customer Replied

The C360 system updates the status to Customer Replied when the customer replies to an email after the Service Request was closed.

Email review helps users flagged for review to improve the quality of their responses.

C360 automatically updates the Service Request status based on actions completed by C360 users.
Do not change Service Request status manually.

Customer 360

Knowledge Check

Scenario:

If Initial Contact was made on a Package Inquiry Service Request with a priority 4- Routine, what will the Service Request status be?

Select answer:

1. Pending Review
2. Collaborating
3. Assigned
4. Working

1/2

Customer 360

Knowledge Check

Scenario:

If Initial Contact was made on a Package Inquiry Service Request with a priority 4- Routine, what will the Service Request status be?

Select answer:

1. Pending Review
2. Collaborating
3. Assigned
4. Working

2/2

Customer 360

Knowledge Check

Scenario:

Can you resolve a Service Request with one contact? If you resolve a Service Request within the Initial Contact SLA with one contact, will you get credit for Initial Contact?

Select answer:

1. Yes, no
2. No, no
3. Yes, yes

1/2

Customer 360

Knowledge Check

Scenario:

Can you resolve a Service Request with one contact? If you resolve a Service Request within the Initial Contact SLA with one contact, will you get credit for Initial Contact?

Select answer:

1. Yes, no
2. No, no
3. Yes, yes

2/2

Customer 360

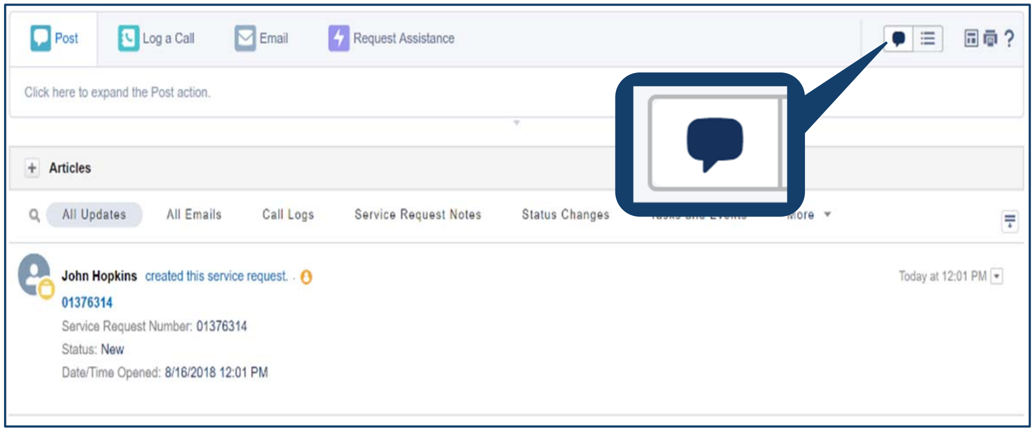
Handling a Service Request

Key Views for Working a Service Request

Customer 360

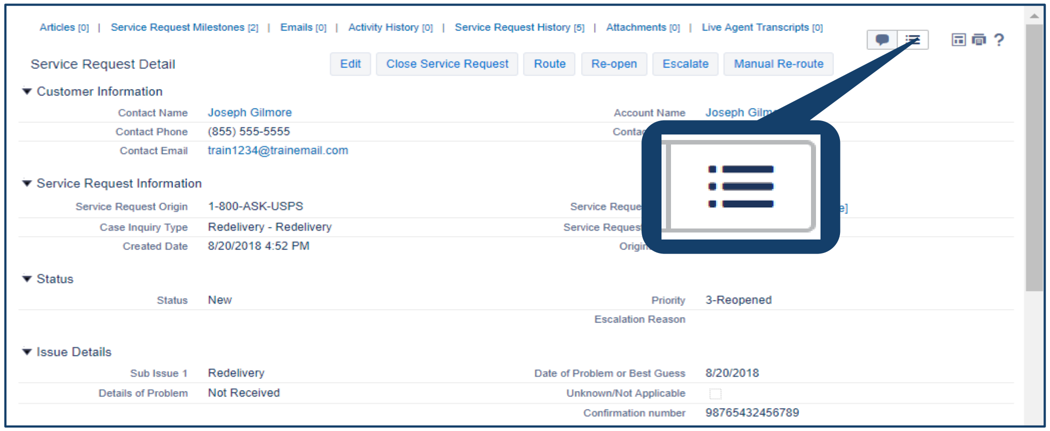
Feed View

The **Feed view** displays a **full history of the status changes, actions, and notes associated with a Service Request**, providing context and reducing the need to follow up with colleagues and customers for more information.



Details View

The **Details view** displays **information about the customer and key details of the Service Request**, including origin, inquiry type, created date, status, and any other notes or information submitted by the creator.

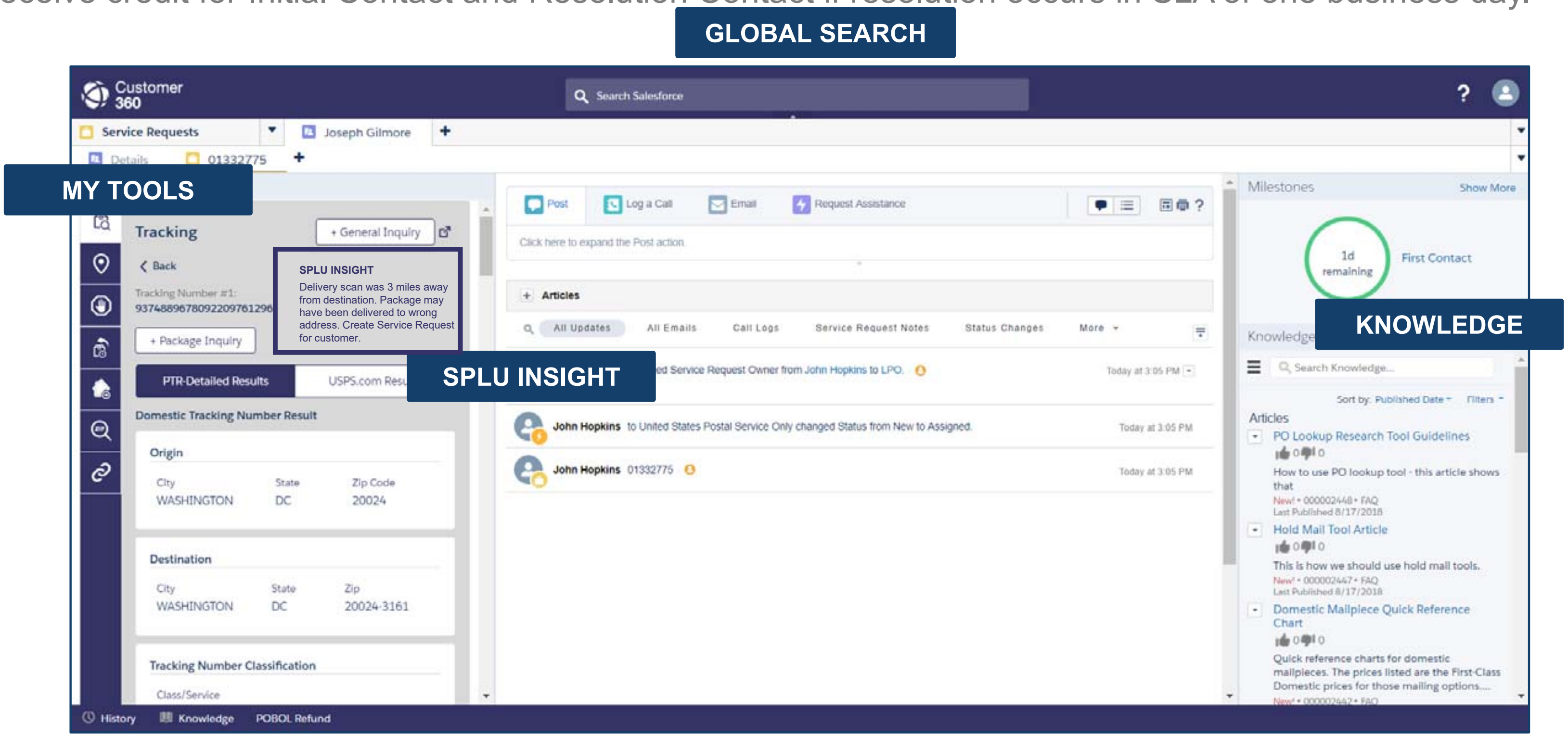


Conduct Initial Investigation

Customer 360

Review information to see if the Service Request can be resolved with one contact. If the issue can be resolved in one contact, you will receive credit for Initial Contact and Resolution Contact if resolution occurs in SLA of one business day.

Note: It is important to conduct a basic initial investigation and review the details on the Details view prior to making the Initial Contact with the customer. This is important because you want to convey awareness and understanding to the customer of the information, they provided in the Service Request.



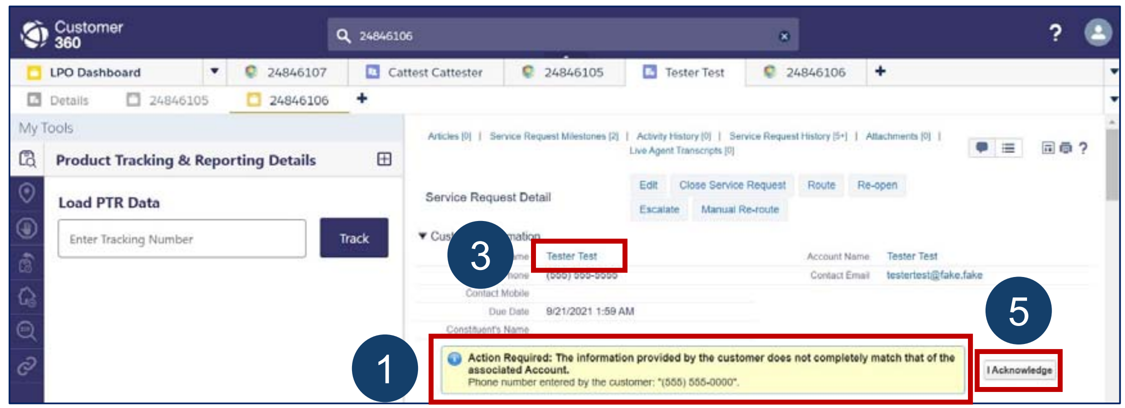
If it is determined that the issue could be resolved with one contact, follow First Contact Resolution Job Aid.

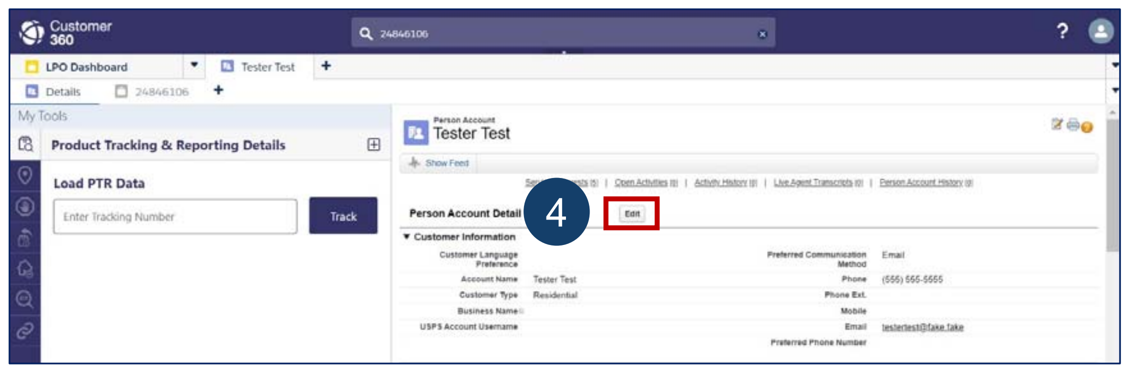
Mismatched Contact Information

When customers enter their contact information in Email Us, it does not always match the contact information saved in their C360 Person Account. To best serve our customers, it is imperative we keep their contact information updated to the best of our ability.

1. If Customers enter information in Email Us that differs from the contact information on file in their Person Account, a message will display under the “Customer Information” section.
2. Contact the customer to confirm their contact information is correct, using their preferred contact method.
3. If needed, select the customer’s name to navigate to their Person Account to update their contact information.
4. On the Person Account, select “Edit” and update the customer’s information. Then, select “Save” and navigate back to the Service Request.
5. After updating the Person Account, select “I Acknowledge” to acknowledge the error message indicating customer contact information has been updated.

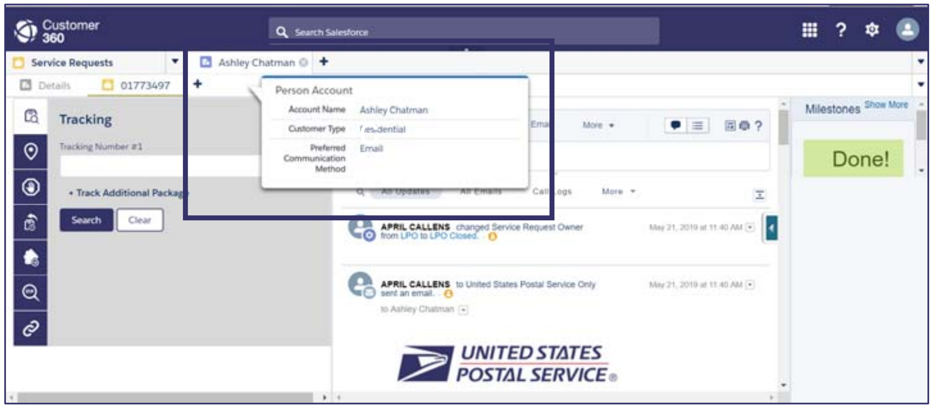
Please note: failure to select “I Acknowledge” will result in an error message. If you see an error message, go back and select the acknowledgment button to proceed.



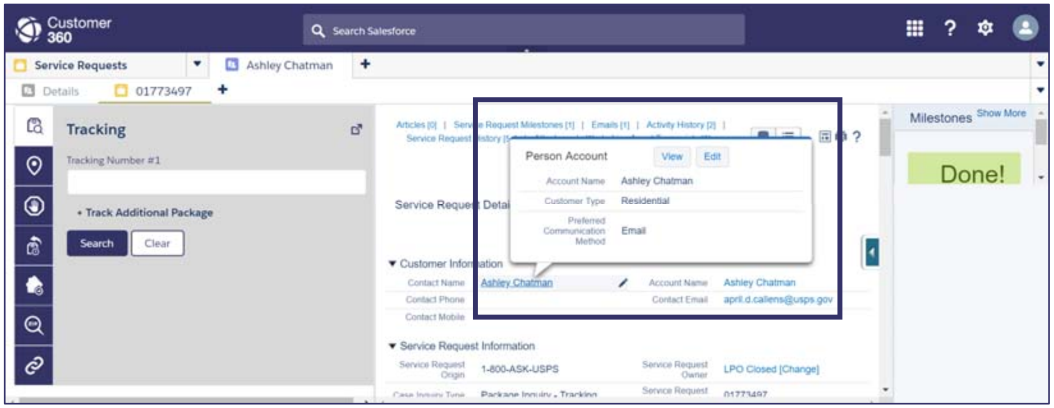


Initial Contact: Preferred Communication Method

It is important to know the customer's preferred communication method before performing the Initial Contact with the Customer. In either the Feed or Details view, hover the mouse over the Contact name tab at the top of the screen or hover the mouse over the Account/Contact's name in the Details view to see the preferred contact method.



Hover to view the customer's Preferred Communication Method in **Feed** view.



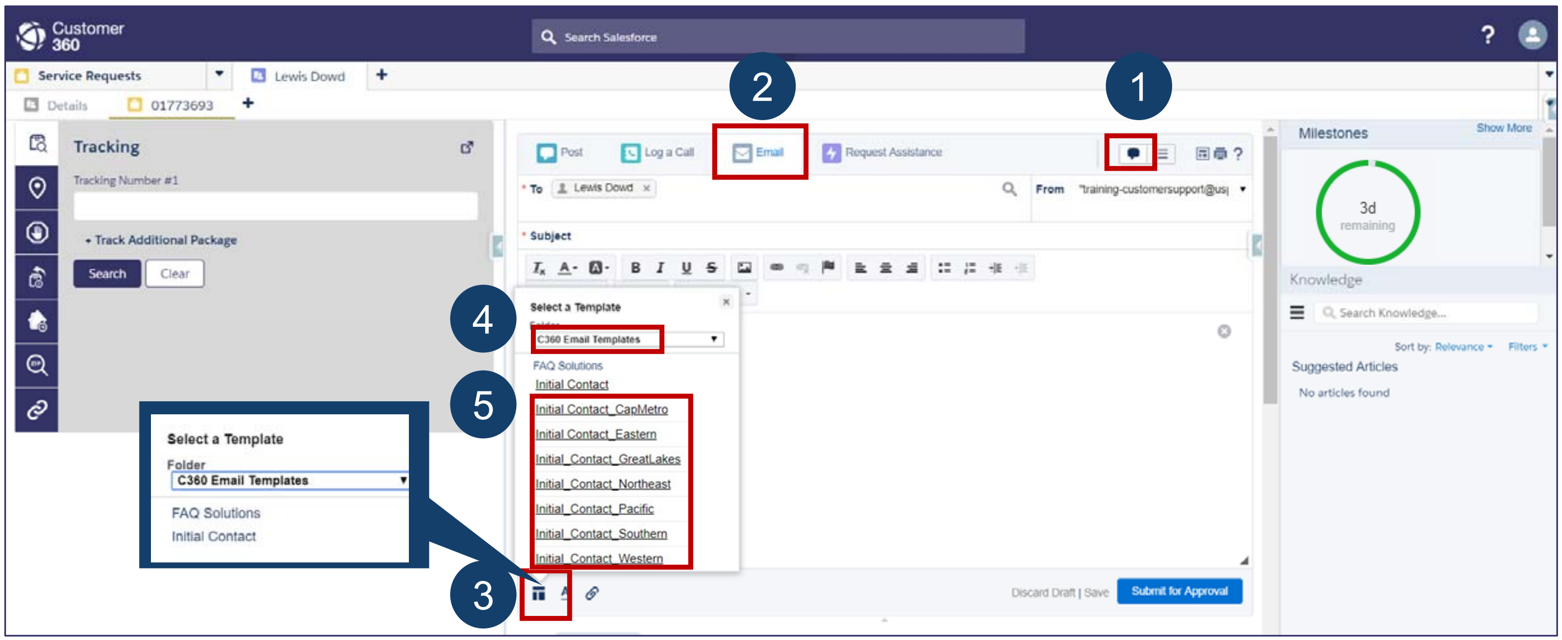
Hover to view the customer's Preferred Communication Method in **Details** view.

Customer 360 requires all customers to have a preferred communication method.

Initial Contact Via E-mail

If the customer's Preferred Communication Method is email, send the customer an Initial Contact email directly in C360 using the Email feature in the Service Request Feed view – all emails sent and received are recorded in the Feed view.

1. Select the icon in the upper right corner of the Service Request to access the **Feed view**.
2. Select **Email** to start an email you will send to the customer.
3. Select the **Email Templates** icon.
4. Select **C360 Email Templates**, which is tied to the *Initial Contact* Milestone clock.
5. Select the **Initial Contact *"Area Name"*** template for any **Area**.



Initial Contact Via E-mail (Continued)

Customer 360

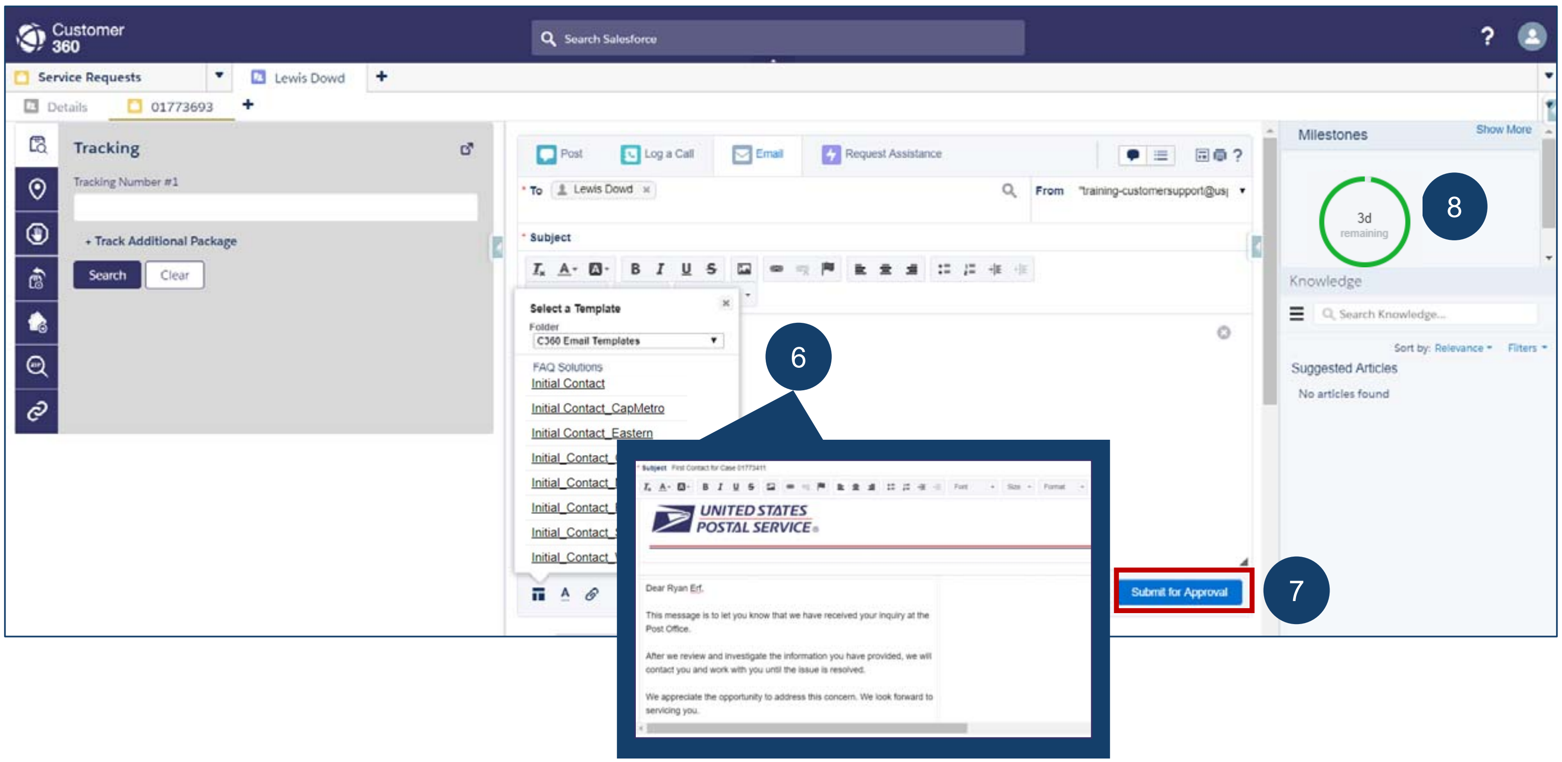
Here's a tutorial video!

6 Confirm the greeting/signature names and edit the email as needed to communicate with the customer.

7 Click **Submit for Approval** to send the email.

8 **When the email is sent to the customer**:

- The **Initial Contact Milestone** is completed
- The Service Request status will change to **Working**
- The **Resolution SLA Milestone** will display with the time remaining to meet the SLA.

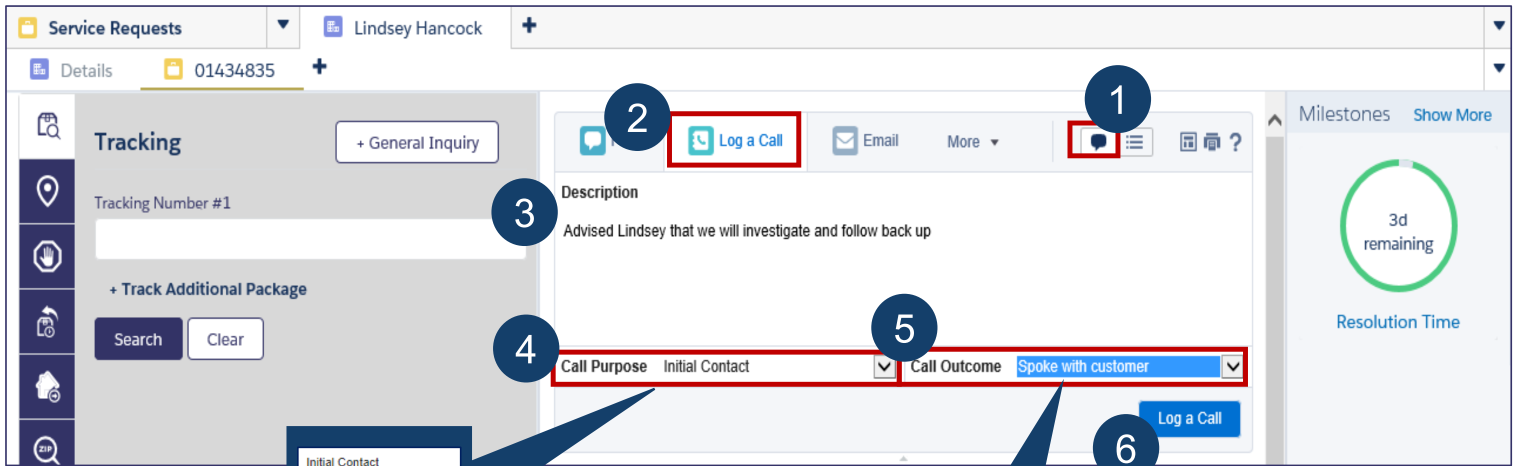


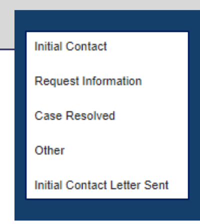
Initial Contact Via Phone

Customer 360

If the customer's Preferred Communication Method is phone, call the customer and then log the Initial Contact call in C360 using the Service Request Feed view – all calls to the customer need to be documented.

1. Select the icon in the upper right corner of the Service Request to access the **Feed view**.
2. Select **Log a Call** to log the call you made to the customer.
3. Add a **Description** (Notes & details) about your call with the customer.
4. Select the **Call Purpose Initial Contact**.
5. Select the appropriate **Call Outcome** based on the result of your call.
6. Select **Log a Call** , which is tied to the Initial Contact Milestone clock and reporting – will change the status of the Service Request to "Working" and the resolution Milestone will display.



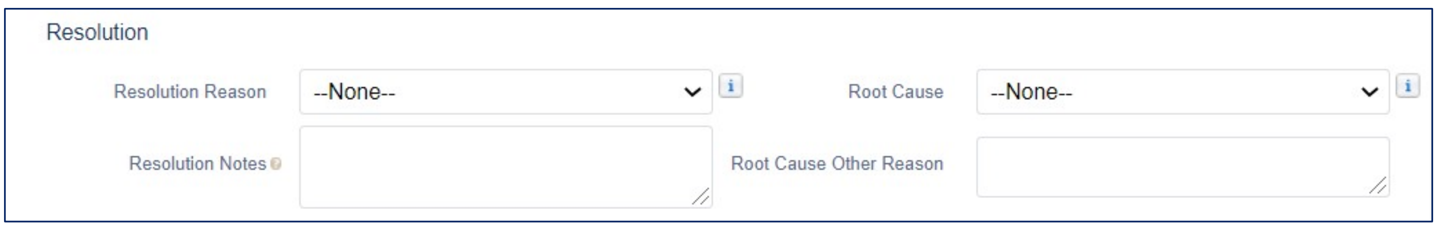


Here's a tutorial video!

Resolution

After performing Initial Contact with the customer, resolving, a Service Request in C360 is a two-step process. The first step is to document the Service Request resolution reason and root cause in the **Details** view.

1. Navigate to the **Details** view of the Service Request
2. Select **Edit** to update the Service Request
3. Scroll down to the **Resolution** section of the Service Request.
4. In the **Resolution Reason** drop down menu, select a **Resolution Reason** and enter **Resolution Notes.**
5. In the **Root Cause** drop-down menu, select a **Root Cause.**
6. Select **Save.**

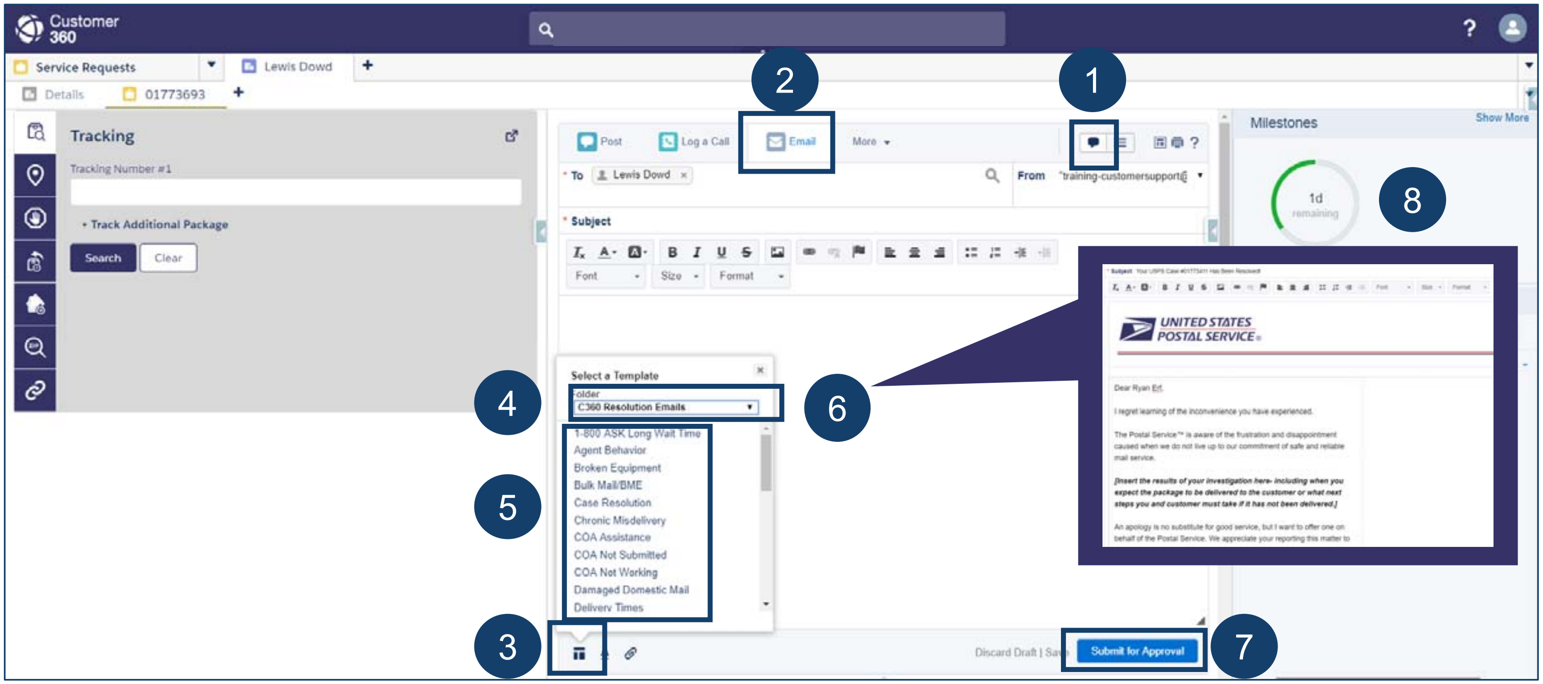


NOTE: Root Cause data provides an opportunity to identify trends and systemic issues at the Area, District, Facility, and Carrier Route level. This information allows local management to develop service improvement plans. Users should only select “Other” when an option is not available for the Root Cause identified.

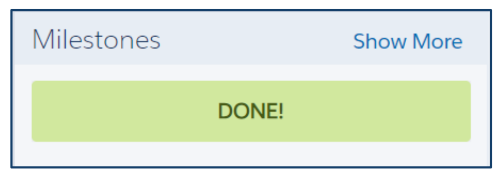
Resolution Via E-mail

Here's a tutorial video!

After Resolution Reason and Root Cause are entered in the Details view the second step is to communicate and document the resolution to the customer in the Feed view. If the customer's Preferred Communication Method is email, send the customer a Resolution email directly in C360 using the Email feature – all emails sent and received are recorded in the Feed view.



1. Select the **Feed** icon in the upper right corner of a Service Request to access the **Feed** view.
2. Select **Email** to start an email you will send to the customer.
3. Select the **Email Templates** icon.
4. Select **C360 Resolution Emails**
5. Select the resolution template relevant for the specific Service Request inquiry type. Edit the template to include your findings and details about the resolution.
6. Confirm the greeting/signature names and edit the email to include the details of the resolution.
7. Select **Submit for Approval** to send the email.
8. When **Submit for Approval** is selected, the SLA Milestones update to "DONE." If the facility is under review, status will update to "Pending Review"

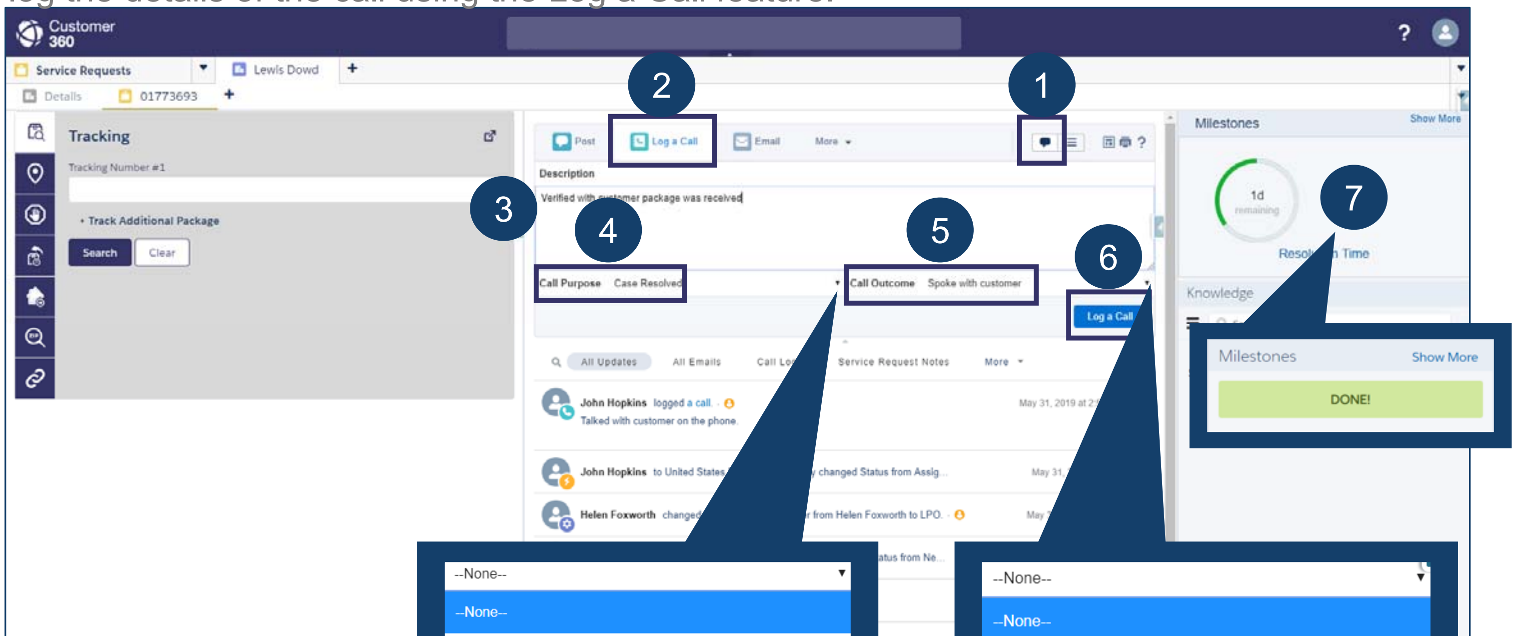


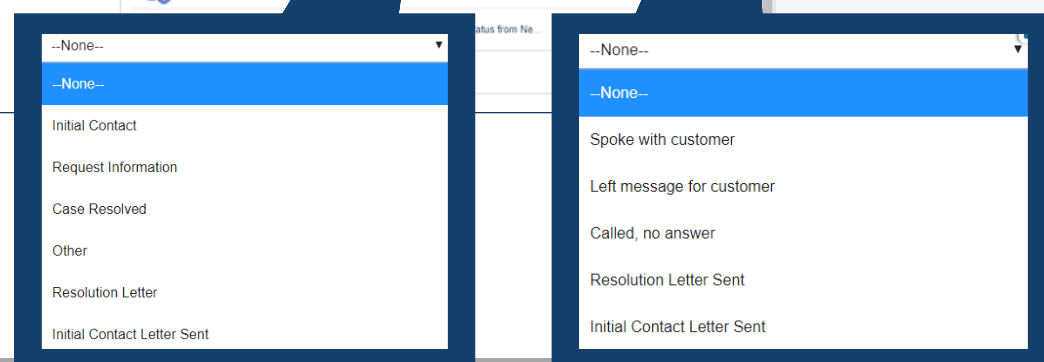
Resolution Via Phone

Here's a tutorial video!

After Resolution Reason and Root Cause are entered in the Details view the second step is to communicate and document the resolution to the customer in the Feed view. If the customer's Preferred Communication Method is phone, call the customer and log the details of the call using the Log a Call feature.

1. Select the **Feed** icon in the upper right corner of a Service Request to access the **Feed** view.
2. Select **Log a Call** to document an outbound Resolution call placed to a customer.
3. Enter a **Description** of the resolution discussed on the call.
4. Select a **Call Purpose**: Case Resolved. This field is tied to the Resolution SLA Milestone clock and reporting – by selecting this option, the Service Request **Status** will update to **Closed**.
5. Select a **Call Outcome**: Spoke with customer or Left message for customer.
6. Select **Log a Call** button to complete Resolution.
7. When the **Log a Call** button is selected, the SLA Milestones update to "DONE."





Customer Replied Status

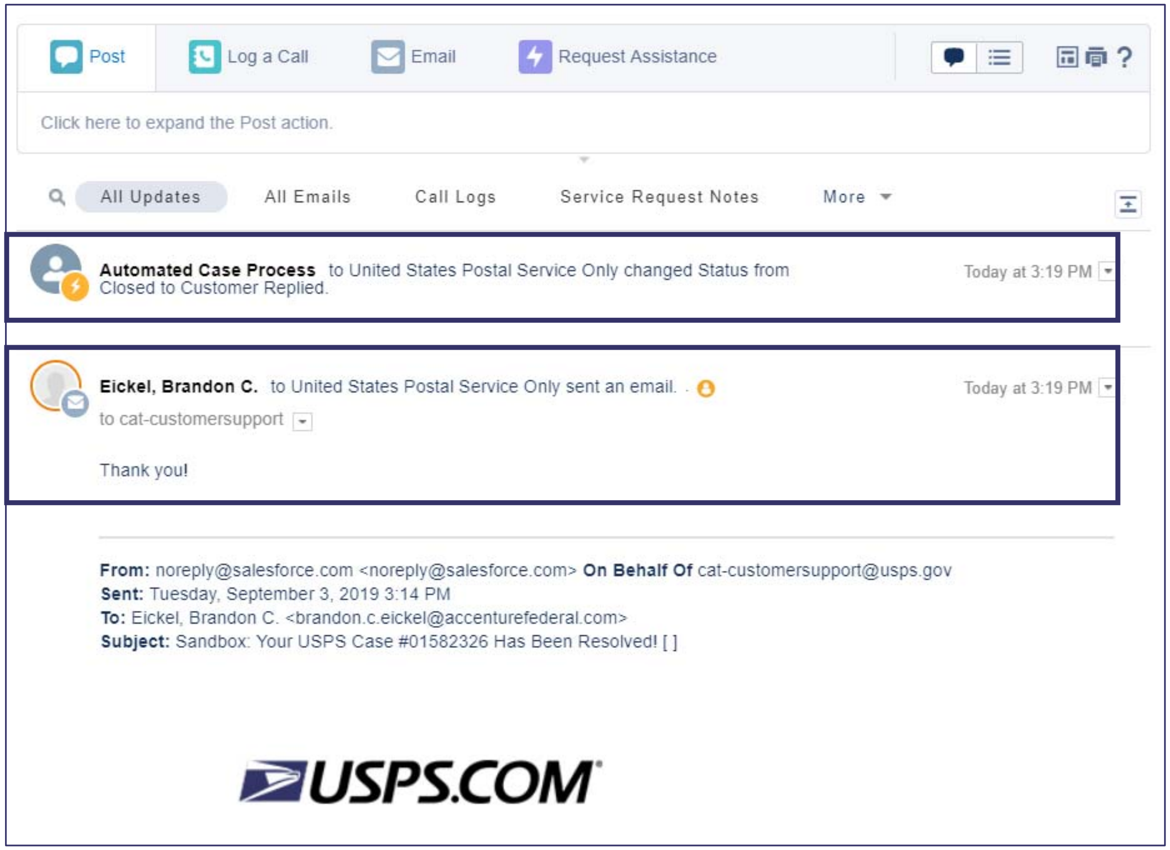
Here's a tutorial video!

The Customer 360 system automatically updates the Status of a Service Request to Customer Replied after receiving the customer's email reply to a Closed Service Request.

Service Request Feed View

- The customer's email reply displays as an activity in the Service Request activity feed, along with the date and time of receipt.
- **Automated Case Process** displays as the owner of the change in **Status** from **Closed** to **Customer Replied**

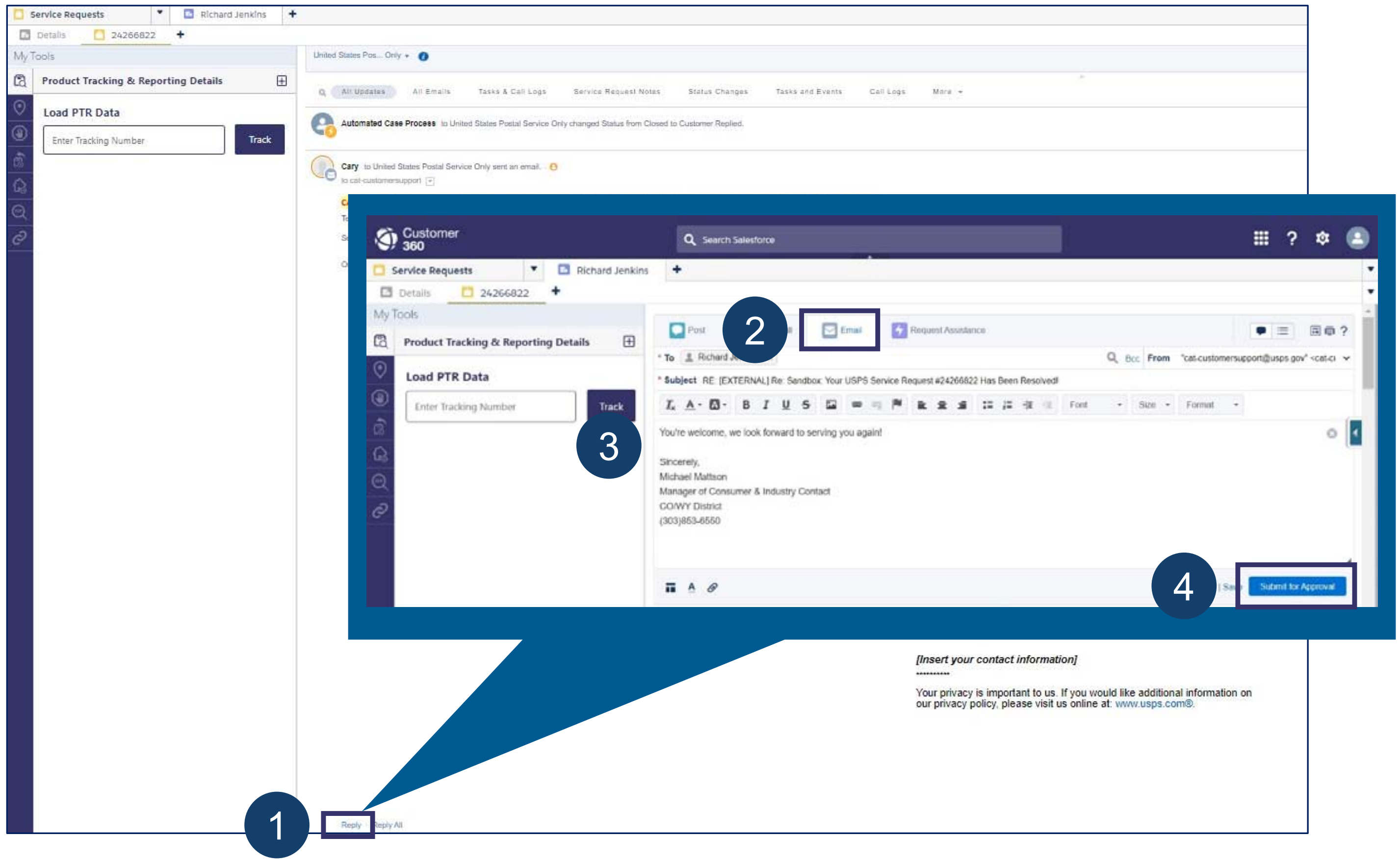
* Customers can respond to any other email associated with the Service Request and sent from Customer 360 (e.g. Initial Contact email). However, the Status will not change and **t**he Customer Replied checkbox will also be checked on the Service Request dashboard. **All customer e-mails need a response.**



Handling Service Requests In Customer Replied Status

To respond to the customer's email, follow the steps below:

1. Select **Reply** at the bottom of the customer's email.
2. Select **Email** from the top of the Service Request **Feed** view – the customer's reply displays with space above to compose a new message.*
3. Compose your response.
4. Select the blue **Submit for Approval** button at the bottom to send the email to the customer.



Reopened Service Requests

Customer 360

A Service Request can be reopened by a customer on USPS.com, Care Center agent, or Consumer Affairs user.

When a Service Request is reopened:

- C360 creates a clone of the original Service Request and links the original and the reopened clone together (this can be found on the **Details** view under the **Service Request Information** section in the **Original Case** field.
- The Service Request will include the original Service Request number as a hyperlink. This allows you to edit the reopened Service Request, while still maintaining a copy of the original Service Request in C360's records.
- Both the Initial Contact and Resolution SLA Milestones will reset to 1 business day and 3 business days, respectively.
- The Priority of the Service Request will be **3-Reopened**.
- All Reopened Service Requests are routed to the Consumer Affairs office.
- A reopened Service Request indicates the customer was not satisfied with the original resolution.

Customer 360

Knowledge Check

Scenario:

A customer has called to report their package was delivered but it is soggy and wet from being left on the sidewalk in the rain. What would be the root cause of this Daily Mail Service Request?

Select answer:

1. Mail was exposed to elements or Damaged during delivery
2. LPO, Received damaged
3. Complaint - Letter Carrier, Crossing lawn

1/2

Customer 360

Knowledge Check

Scenario:

A customer has called to report their package was delivered but it is soggy and wet from being left on the sidewalk in the rain. What would be the root cause of this Daily Mail Service Request?

Select answer:

1. Mail was exposed to elements or Damaged during delivery
2. LPO, Received damaged
3. Complaint - Letter Carrier, Crossing lawn

2/2

Customer 360

Knowledge Check

Scenario:

A Package Inquiry Service Request was reopened. What will the priority number be and what will the SLA Milestones be?

Select answer:

1. 3 – Reopened, Initial Contact: 12 pm the next working day, Resolution: 3 working days
2. 4 – Routine, Initial Contact: 1 working day, Resolution: 3 working days
3. 3 – Reopened, Initial Contact: 1 working day, Resolution: 3 working days
4. 4 – Routine, Initial Contact: 12 pm the next working day, Resolution: 3 working days

1/2

Customer 360

Knowledge Check

Scenario:

A Package Inquiry Service Request was reopened. What will the priority number be and what will the SLA Milestones be?

Select answer:

1. 3 – Reopened, Initial Contact: 12 pm the next working day, Resolution: 3 working days
2. 4 – Routine, Initial Contact: 1 working day, Resolution: 3 working days
3. 3 – Reopened, Initial Contact: 1 working day, Resolution: 3 working days
4. 4 – Routine, Initial Contact: 12 pm the next working day, Resolution: 3 working days

2/2

Knowledge Check

Customer 360

Scenario:
If a customer's preferred communication method is phone, and you have called the customer to perform Initial Contact, how do you log the call in C360?

Select answer:

1. Navigate to the Feed View, select the “Log a Call” tab, select the “Log a Call” button
2. C360 will record the call for you
3. Navigate to the Feed View, select the “Log a Call” tab, add a description, select “Initial Contact” under call purpose, select call outcome, and select the “Log a Call” button
4. Navigate to the Feed View, select “Log a Call”, select “Initial Contact” under call purpose, select call outcome, and select the “Log a Call” button

1/2

Customer 360

Knowledge Check

Scenario:

If a customer's preferred communication method is phone, and you have called the customer to perform Initial Contact, how do you log the call in C360?

Select answer:

1. Navigate to the Feed View, select the “Log a Call” tab, select the “Log a Call” button
2. C360 will record the call for you
3. Navigate to the Feed View, select the “Log a Call” tab, add a description, select “Initial Contact” under call purpose, select call outcome, and select the “Log a Call” button
4. Navigate to the Feed View, select “Log a Call”, select “Initial Contact” under call purpose, select call outcome, and select the “Log a Call” button

2/2

Email Reviews

How to Handle Email Reviews

Here's a tutorial video!

The District **Consumer Affairs Manager,** all **Consumer Affairs Representatives and Local Postmasters Designated as Reviewers** can review and approve C360 Resolution emails in Customer 360. The email review process helps improve the quality of email responses sent to customers. If a facility is flagged for review a Resolution email will route to the District Consumer Affairs office (CAO) for review. The Service Request status will update to "Pending Review". **LPO Users do not have to take further action when the Service Request is in Pending Review.**

The next slides are intended for the following Consumer Affairs audiences:

The Consumer Affairs **Approver** – Whose job is to review and approve emails.

- **Consumer Affairs Manager:** Can assign email reviews or instruct employees to reassign email reviews to themselves.
- **Consumer Affairs Representatives:** Consumer Affairs Representatives may be assigned an email to review by the Consumer Affairs Manager or can reassign emails to other Consumer Affairs staff or themselves.

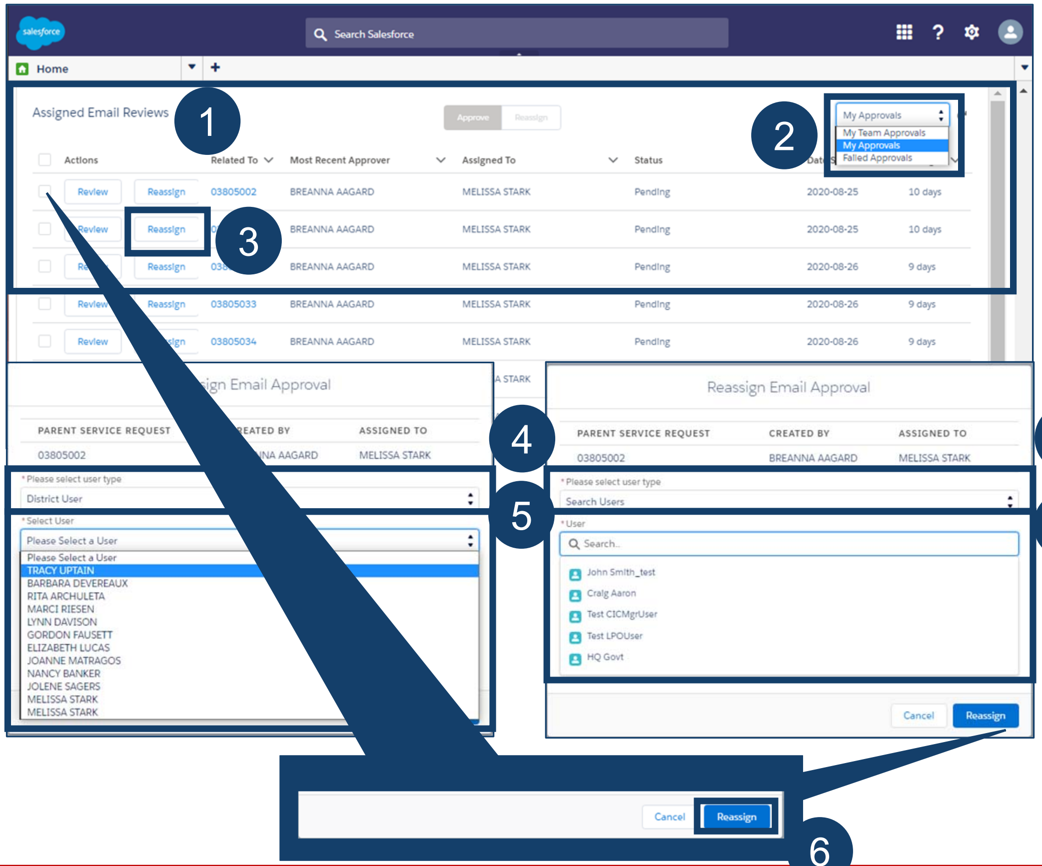
Actions available by Email Reviewers:

- **Approve, Edit & Approve, Reject**, and **Reassign** email reviews to CAO Employees or Designated Reviewer Local Postmaster.
- **Flag** & **Unflag** Facilities for Review *[Only available to Managers]* (Facilities flagged for Review will need the Consumer Affairs approval of Emails.)

To designate a Local Postmaster as a Reviewer contact C360 Support.

Reassign an Email Review

Consumer Affairs Managers and Clerks can reassign Email Reviews to other staff or themselves to ensure they are reviewed in a timely manner.



1. Navigate to the Home Page and scroll down to the Assigned Email Reviews section.
2. Email Reviews have three lists: My Team Approvals, My Approvals, Failed Approval lists. To move between these lists, use the drop-down menu on the right side of the module
3. Select Reassign to open the Reassign Email Approval window.
4. Select the User Type in the drop-down menu based on the following:
   - To Reassign the email to another member of your Consumer Affairs Office, select District User
   - To Reassign the email to another employee who is not in your Consumer Affairs Office, select Search Users
5. Select the user you would like to Reassign the Email Review from either the drop down or the search bar, depending on your selected User Type.
6. Select Reassign to assign the Email Review to the user you have chosen.

CAMs can bulk reassign email reviews using the left- hand selection boxes and the **Reassign** button at the top of the module.

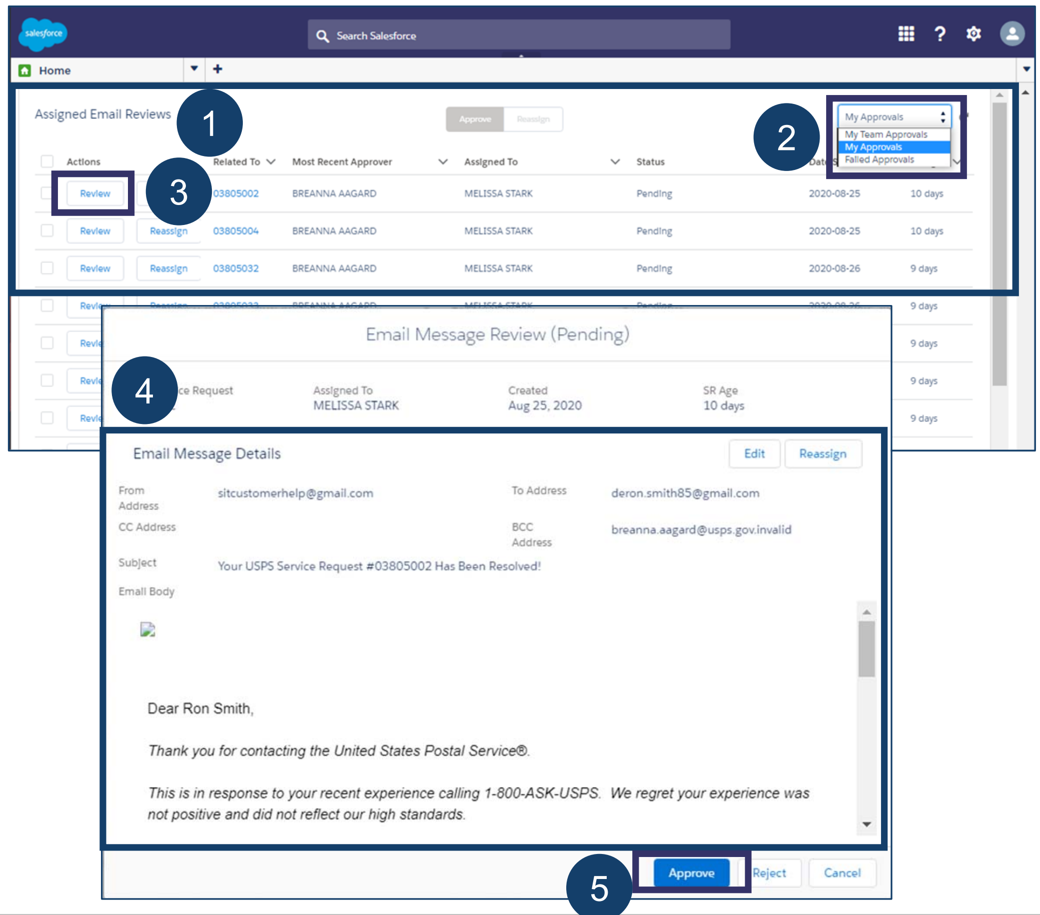
Approve an Email Review

Customer 360

Email approvers can approve Email Reviews directly in the module after reviewing the email draft.

Approve → Email is sent to customer

1. Navigate to the Home Page and scroll down to the Assigned Email Reviews section.
2. To move between the My Team Approvals and My Approvals lists, use the drop-down menu on the right side of the module
3. Select Review to open the email on the page.
4. Review the Email Message Details and scroll down in the body to ensure the email meets USPS style and grammar guidelines and is responsive to the issue described.
5. If the email is acceptable, select Approve to send the email to the customer. The Service Request Status will automatically update to Closed and the Service Request will be removed from the LPO user's Service Request Dashboard.



Edit and Approve an Email Review

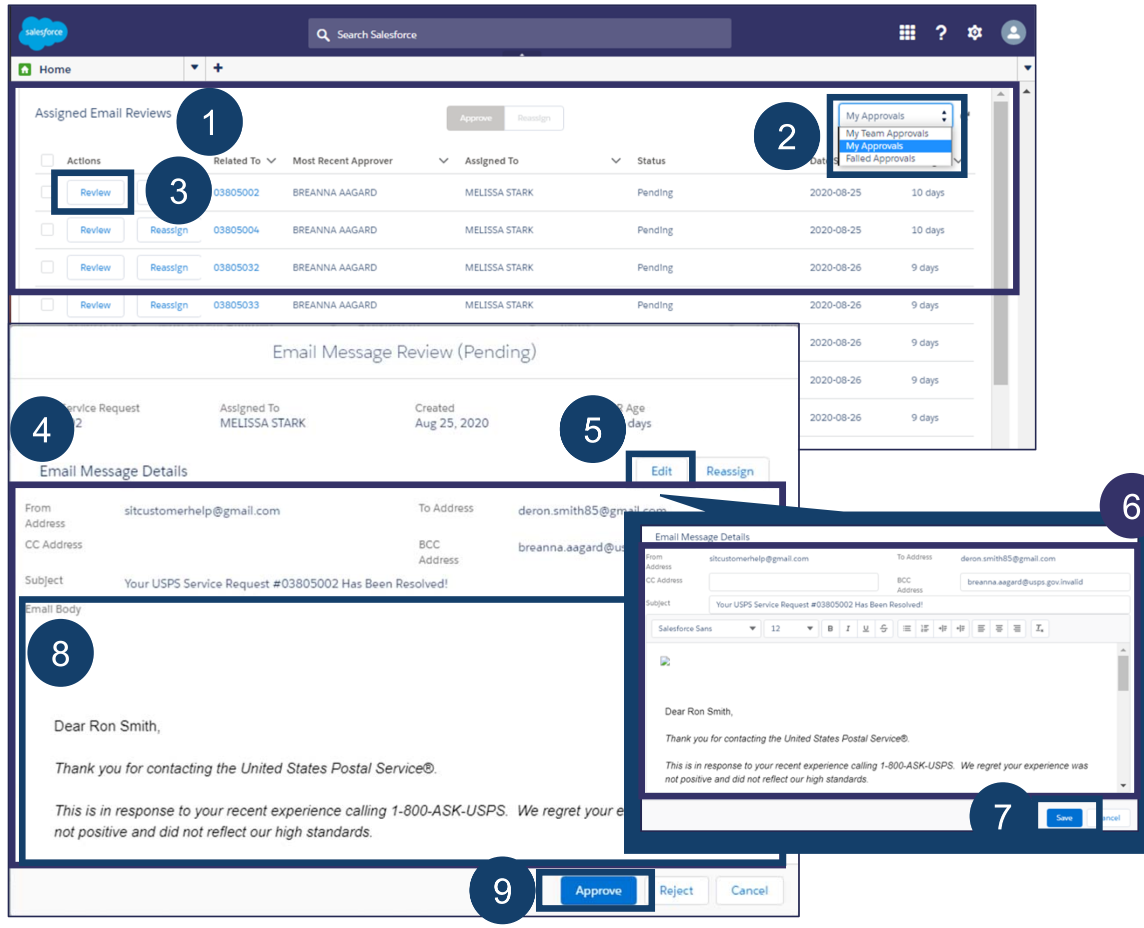
Customer 360

Email approvers can edit the Email Review on the Home Page before approving it to be sent to the customer.

Edit & Approve → Email is sent with edits

1. Navigate to the Home Page and scroll down to the Assigned Email Reviews section.
2. To move between the My Team Approvals and My Approvals lists, use the drop-down menu on the right side of the module
3. Select Review to open the email on the page.
4. Review the Email Message Details and scroll down in the body to ensure the email meets USPS style and grammar guidelines. and is responsive to the issue described.
5. If the email is mostly acceptable but needs minor edits, select Edit.
6. Edit the CC Address, BCC Address, or Email Body as needed.

   Select Save.
7. You can view the updated email to confirm that your changes have taken effect in the same window.
8.
9. Select Approve to send the email to the customer. The Service Request Status will automatically update to Closed and the Service Request will be removed from the LPO user's Service Request Dashboard.

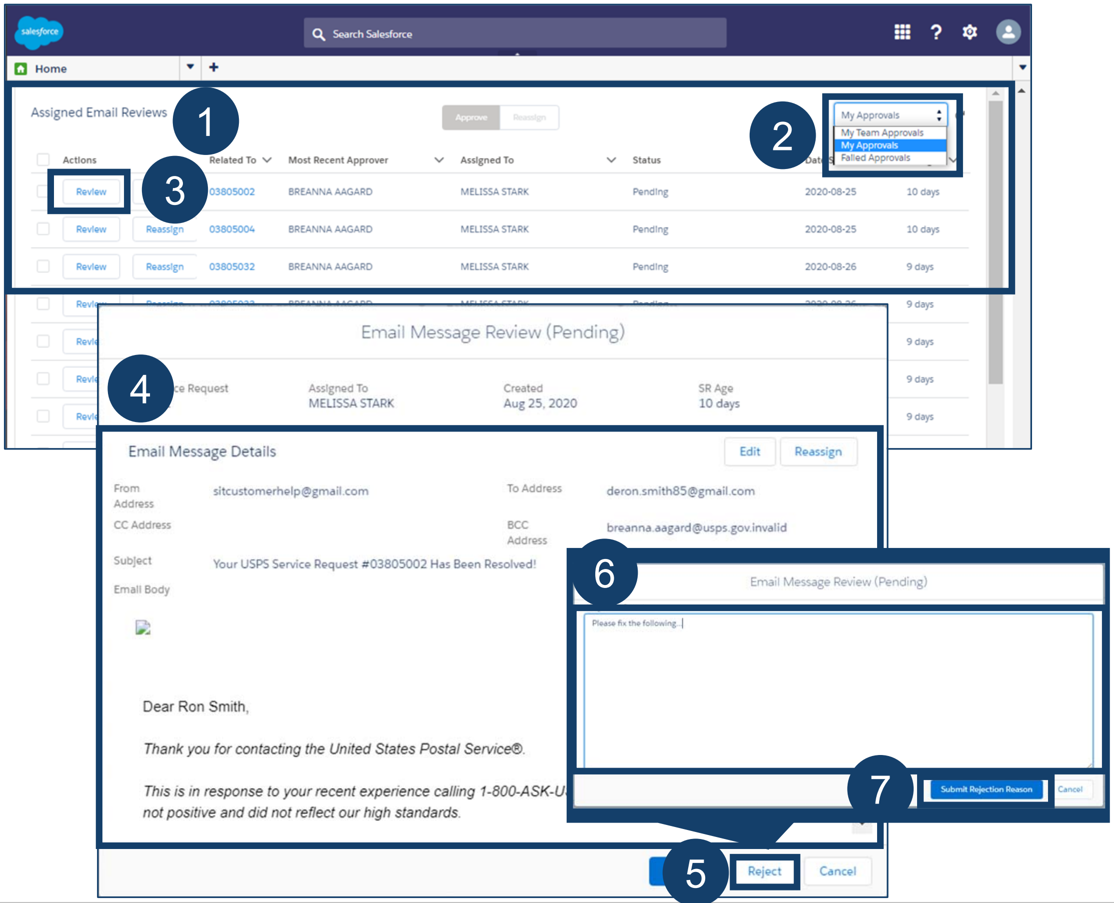


Reject an Email Review

Email approvers can reject an Email Review and provide advice to the LPO user to improve the email before submitting it again to be reviewed and approved.

Reject → Email is not sent, enter a reject reason and it returns to LPO to fix response.

1. Navigate to the Home Page and scroll down to the Assigned Email Reviews section.
2. To move between the My Team Approvals and My Approvals lists, use the drop-down menu on the right side of the module.
3. Select Review to open the email on the page.
4. Review the Email Message Details and scroll down in the body to ensure the email meets USPS style and grammar guidelines and is responsive to the issue described.
5. If the email does not meet USPS standards, select Reject.
6. The Email Message Review window will appear with the Rejection Reason field. Enter a Rejection Reason.
   Please note: It is important to be as detailed as possible to provide the LPO user with an opportunity to improve their future emails and allow their facility to be removed from being flagged for review.
7. Select Submit Rejection Reason. This will automatically update the Service Request Status to Rejected and will notify the LPO user to update the email and re-submit it for review.

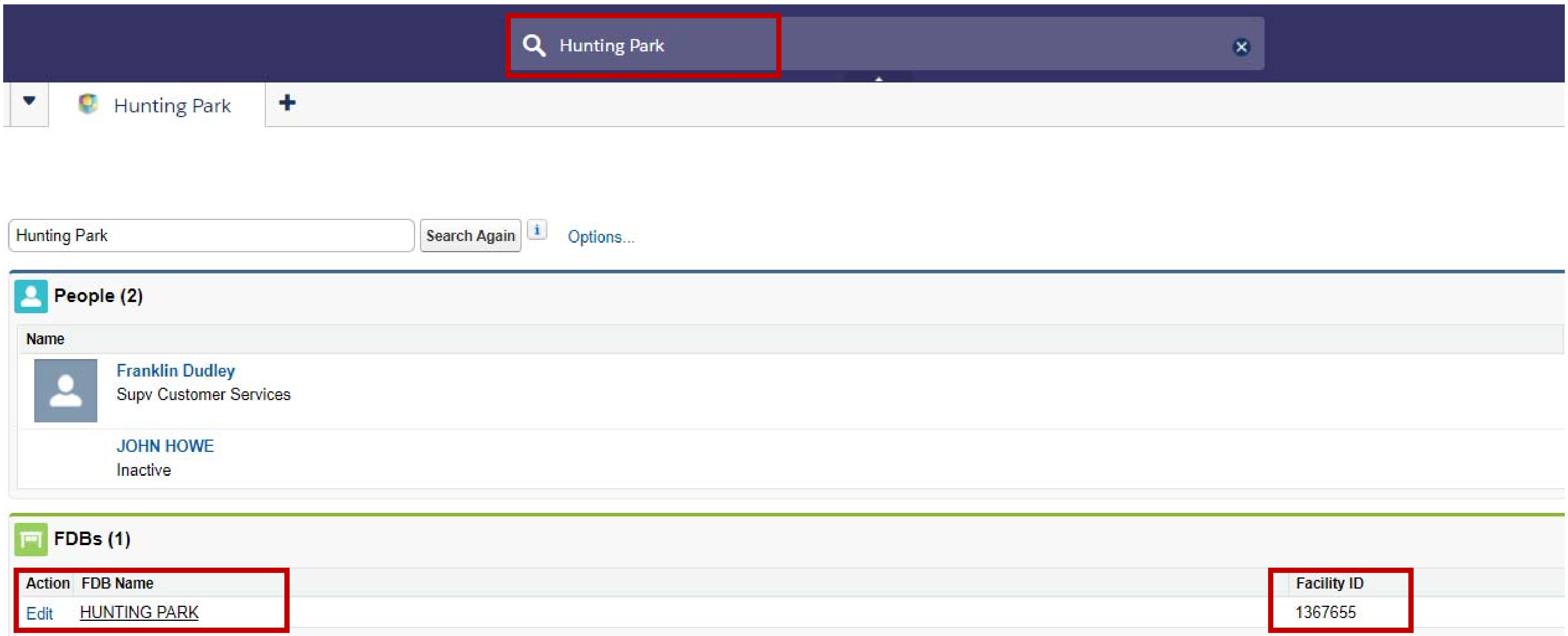


Flagging Facilities for Email Review

Customer 360

Consumer Affairs Managers decide which facilities should be flagged for review and follow these steps to flag or unflag them.

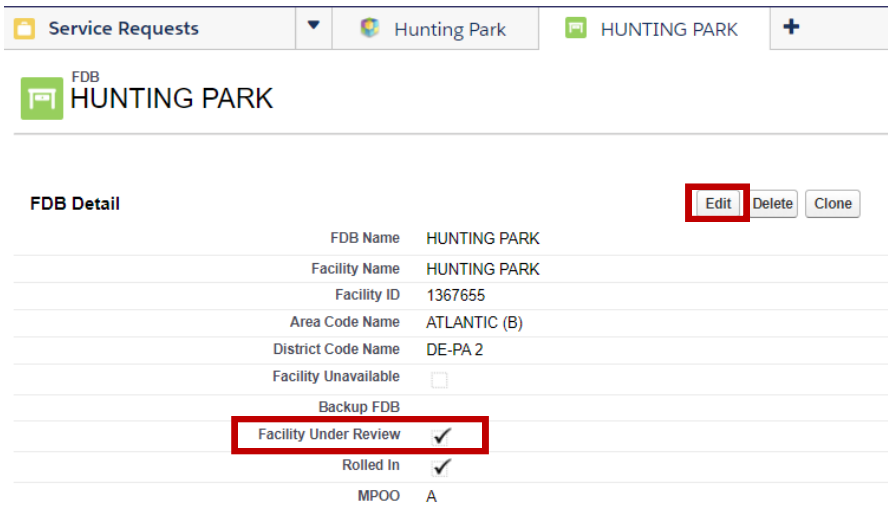
1 Use Global Search to search by Facility Name or FDB ID to locate the FDB record. Confirm that the FDB number is correct.



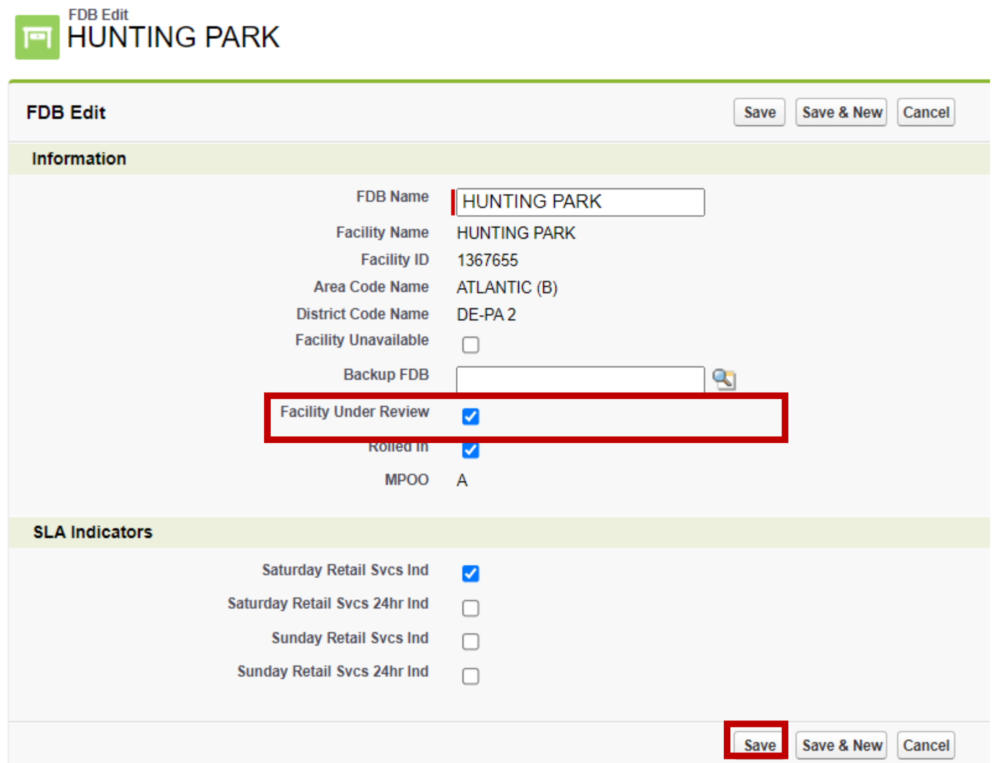
A report to identify facilities flagged for review is available in C360 click FDB – Flagged Report for instructions.

Flagging Facilities for Email Review (Continued)

3 Click on Edit to enable editing of the FDB record.



4 Click on the checkbox next to Facility under Review.



To learn how to declare a Facility unavailable with a Backup FDB click here.

5 Click on Save and Refresh the screen (CTRL + F5)

Knowledge Check

Scenario:

A C360 Resolution email is sent for approval and the facility is flagged for review. If the approver opens the email and there is a small typo in the email, what should the approver do?

Select answer:

1. Approve the email since it is a small error
2. Edit the typo and approve the email
3. Reject and provide advice to the LPO user to improve the email

1/2

Knowledge Check

Customer 360

Scenario:

A C360 Resolution email is sent for approval and the facility is flagged for review. If the approver opens the email and there is a small typo in the email, what should the approver do?

Select answer:

1. Approve the email since it is a small error
2. Edit the typo and approve the email
3. Reject and provide advice to the LPO user to improve the email

2/2

Customer 360

Knowledge Check

Scenario:

You are a Consumer Affairs Manager who is an email approver. You're going on vacation for two days. How should you handle the email approval queue while you're gone?

Select answer:

1. Wait until you return
2. Delegate to your HQ admin user
3. Work on your vacation time
4. Delegate the email approval to other staff with District C360 access

1/2

Customer 360

Knowledge Check

Scenario:

You are a Consumer Affairs Manager who is an email approver. You're going on vacation for two days. How should you handle the email approval queue while you're gone?

Select answer:

1. Wait until you return
2. Delegate to your HQ admin user
3. Work on your vacation time
4. Delegate the email approval to other staff with District C360 access

2/2

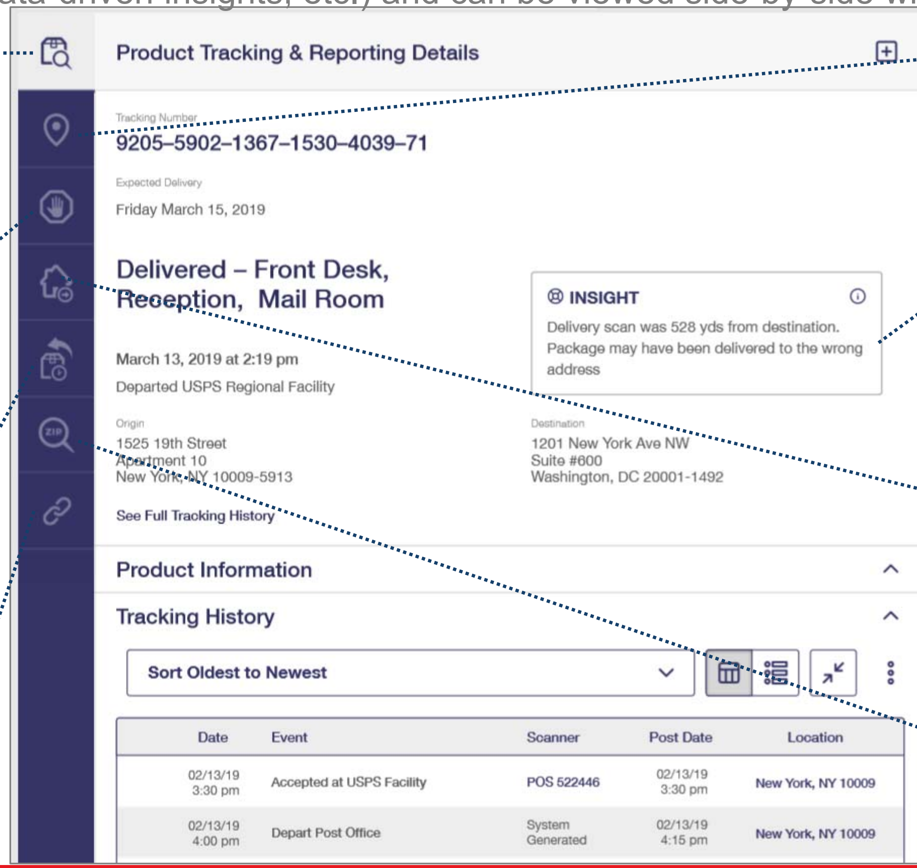
Customer 360

Research and Collaboration Tools

My Tools

Here's a tutorial video!

Integrated tools reduce time spent accessing critical information needed to support issue resolution (e.g. PTR for package tracking, SPLU data-driven insights, etc.) and can be viewed side-by-side with Service Requests.



Tracking

Track up to 5 packages at once and view consolidated tracking results from PTR and USPS.com.®

Hold Mail

View the details of an existing Hold Mail request (requires customer's Hold Mail Confirmation Number).

Redelivery

View the details of an existing Redelivery request (requires customer's Redelivery Confirmation Number).

External Links

Contains links to other USPS® tools.

Find Locations & Hours

Look up Postal facility hours and locations.

SPLU Insight

SPLU's insight includes the most relevant and current information about the package.

Change of Address

View the details of an existing Change of Address request (requires customer's new address).

City & ZIP Lookup

Search for an address, city, or ZIP Code.

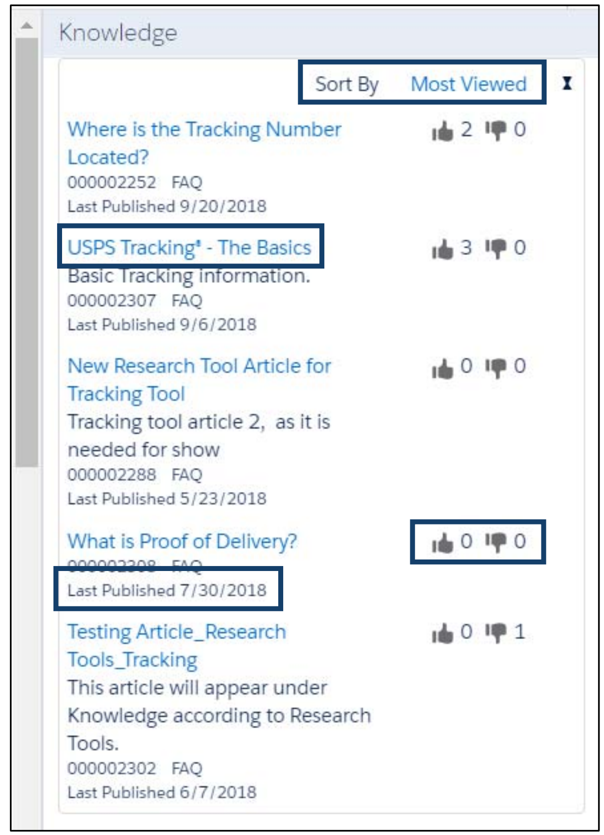
Knowledge

Customer 360

The Knowledge tool empowers you with the same CORE Language and FAQs available to the Care Center internally and customers on the USPS.com FAQs page.

Accessing Knowledge from Account, Contact, or Service Request

- While on a customer account (or a Service Request), the Knowledge menu will display on the right side of the screen.
- Sort Knowledge articles by:
  - Most Viewed
  - Published Date
  - Title A to Z
  - Title Z to A
- Filter articles by specific topic/issue type.
- To open the article in a new subtab, click on the article name.
- Review the Last Published date and a summary of other users' thumbs up/down ratings for key insight.



* Knowledge can also be accessed using the Global Search, Object Navigation Menu, and the Footer Bar at the bottom left corner of the screen.

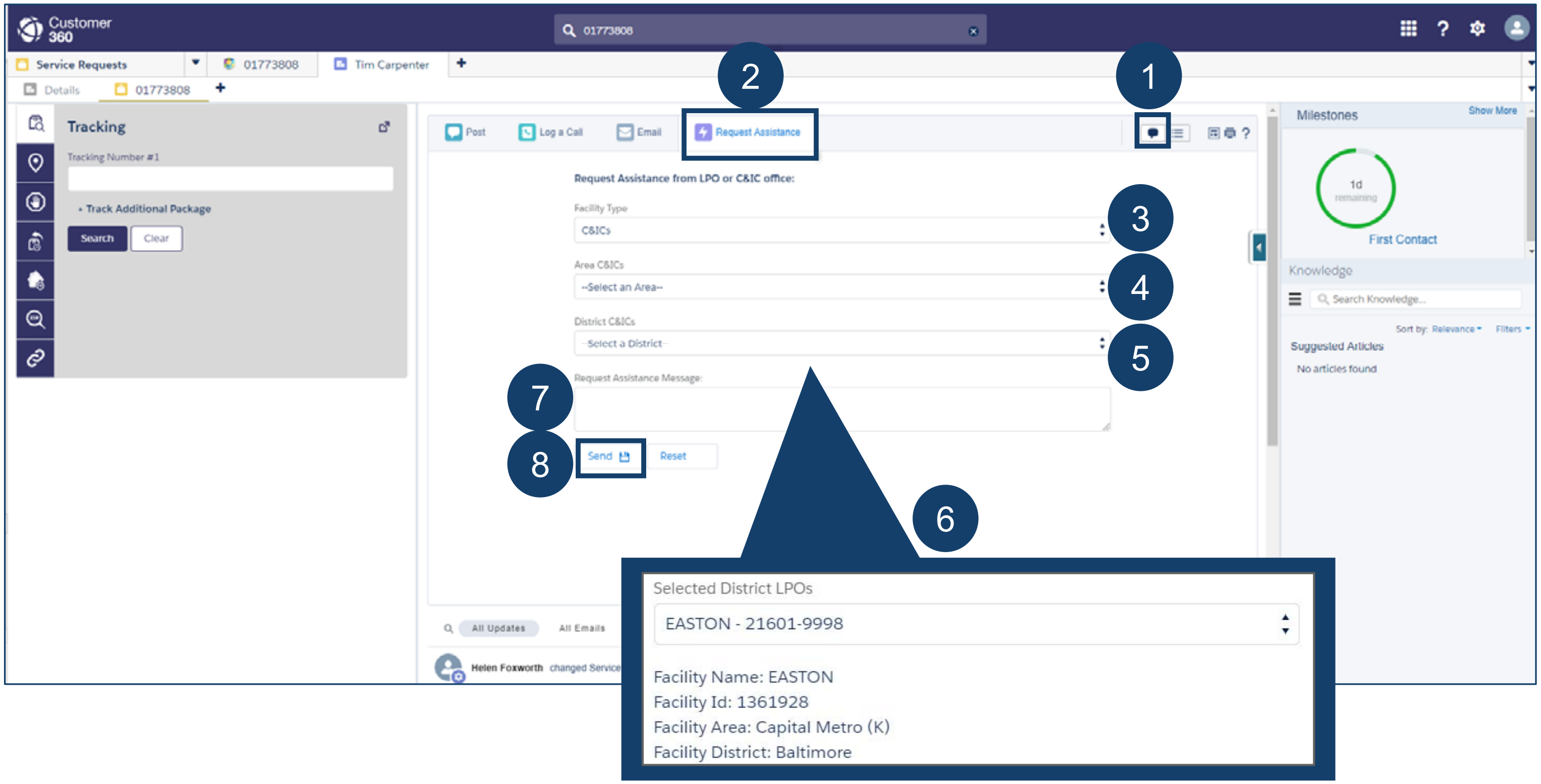
* Agent Only articles are for **internal use only**.

How to Request Assistance

Here's a tutorial video!

A Request Assistance selection creates a Chatter post and tags all C360 users assigned to the facility selected.

1. Select the **Feed** icon in the upper right corner to access the **Feed** view.
2. Select **Request Assistance**.
3. Select a **Facility Type**: Consumer Affairs or LPO.
4. Select an **Area**.
5. Select a **District**.
6. If LPO is selected as the Facility Type, select a specific District **LPO**.
7. Add a **Request Assistance Message** that includes a direct request for action.
8. Select **Send**.



* The Service Request **Status** will automatically change to **Collaborating** when a request for assistance is sent.

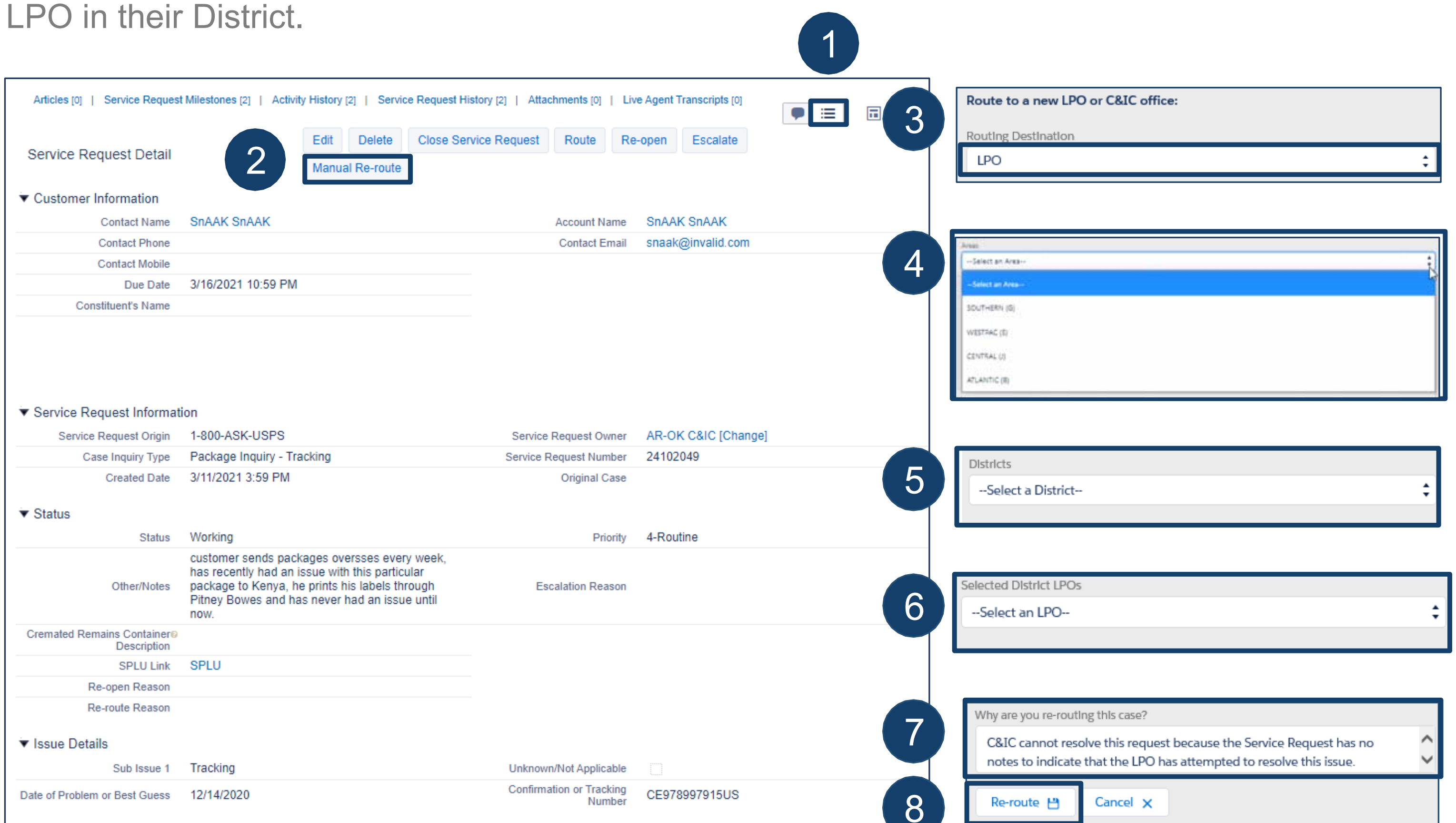
* Make every effort to resolve the issue prior to requesting assistance from the District Consumer Affairs office.

Manually Re-Route a Service Request

*Only include for District users.

Consumer Affairs Managers & Representatives can manually re-route a Service Request to any other Consumer Affairs facility in the country or any LPO in their District.

1. Navigate to the **Details** view of a Service Request.
2. Select **Manual Re-route**.
3. From the Routing Destination drop-down menu, select **LPO.**
4. Select an **Area**.
5. Select a **District.**
6. Select a Local Post Office (**LPO).**
7. Enter a reason for re-routing the Service Request.
8. Select **Re-route.**



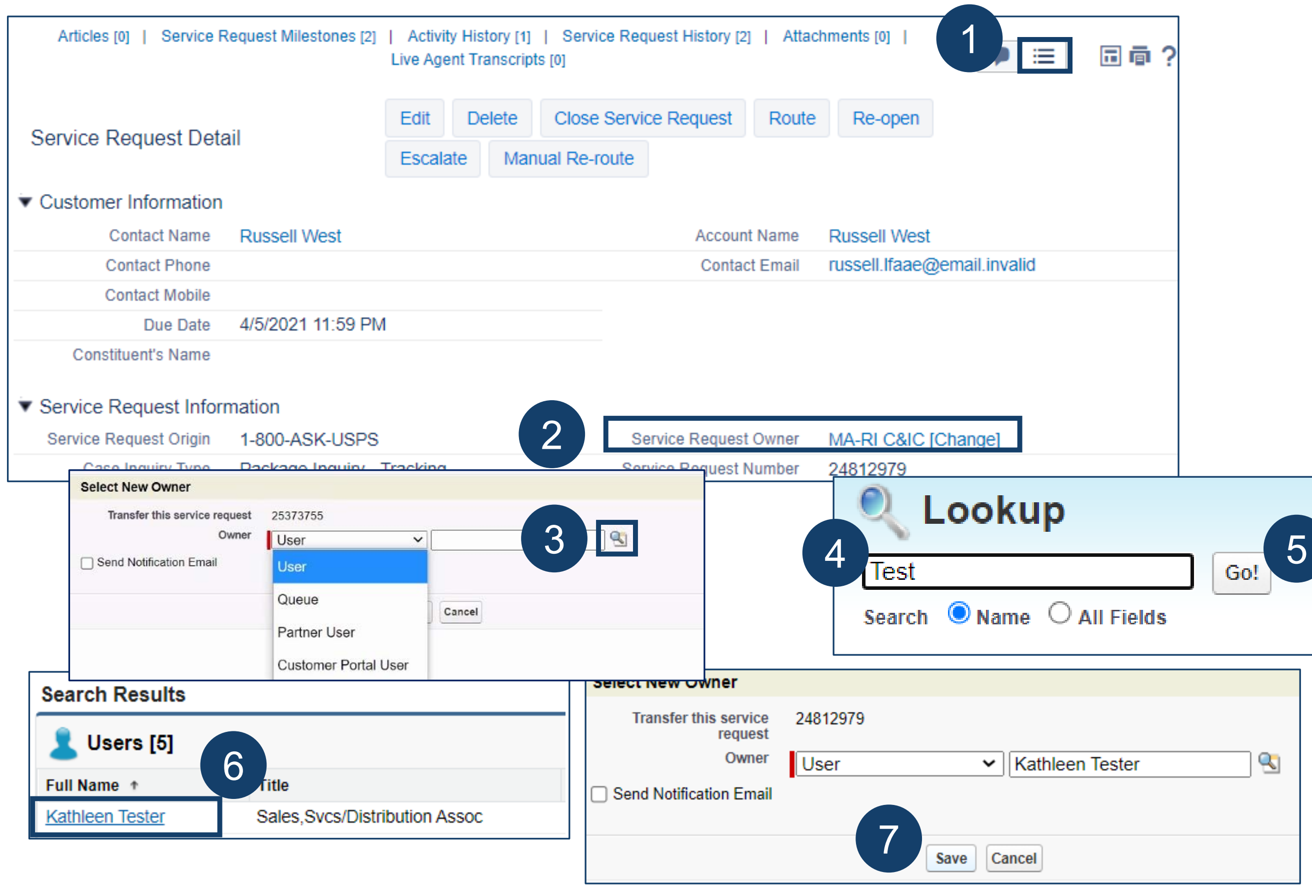
* CAM must obtain the receiving District's concurrence prior to rerouting the Service Request.

Changing Ownership of a Service Request

*Only include for District users.

Consumer Affairs users can change ownership of a Service Requests by following the next steps:

1. Select the **Details** view icon.
2. Under the ***Service Request Information*** section find ***Service Request Owner*** and click **[Change].**
   Service Request Owner MA-RI C&IC [Change]
3. You'll be prompted to select a new **Owner.** You have the option to select **User** or **Queue.** Click the **magnifying glass icon.**
4. In the search bar type the user you'll be assigning the Service Request to; it could be yourself if you're taking ownership.
5. Click **Go!** Go!
6. The results from the search will display **select** the appropriate user.
7. **Click Save** and the Service Request Owner Service Request Owner Kathleen Tester [Change]



Customer 360

Knowledge Check

Scenario:

If you receive a Package Inquiry Service Request that has already been reopened and escalated, what steps should you follow?

Select answer:

1. Review the reopen reason, investigate and follow up with the customer immediately.
2. Check MyTools, review SPLU insights and Tracking updates, review previous resolution and work the case with the LPO.
3. Re-route Service Request to the LPO.
4. Re-route Service Request to the District where the item was last scanned.

1/2

Customer 360

Knowledge Check

Scenario:

If you receive a Package Inquiry Service Request that has already been reopened and escalated, what steps should you follow?

Select answer:

1. Review the reopen reason, investigate and follow up with the customer immediately.
2. Check MyTools, review SPLU insights and Tracking updates, review previous resolution and work the case with the LPO.
3. Re-route Service Request to the LPO.
4. Re-route Service Request to the District where the item was last scanned.

2/2

Knowledge Check

Customer 360

Scenario:

You are trying to resolve a Package Inquiry Service Request where the package has received an "Enroute" physical scan. What should you do?

Select answer:

1. Re-route the Service Request to the District where item was last scanned.
2. Ask the customer to contact the original shipper.
3. Use "Request Assistance" to request assistance from the Consumer Affairs office where item was last scanned.
4. Tell the customer package is invalid and someone will call them from the delivery office.

1/2

Customer 360

Knowledge Check

Scenario:

You are trying to resolve a Package Inquiry Service Request where the package has received an "Enroute" physical scan. What should you do?

Select answer:

1. Re-route the Service Request to the District where item was last scanned.
2. Ask the customer to contact the original shipper.
3. Use "Request Assistance" to request assistance from the Consumer Affairs office where item was last scanned.
4. Tell the customer package is invalid and someone will call them from the delivery office.

2/2

Customer 360

Reports & Dashboards

Reports & Dashboards – Key Dashboards

Customer 360

Customer 360 provides three key Service Request dashboards in users "Home" page. Reports are based on real-time data with the ability to drill-down and open Service Requests directly from the reports. The Service Request data reflected in the reports is based on the facilities the user has access to within C360.

REPORT	DESCRIPTION
C360 Initial Contact Report	**The C360 Initial Contact Report provides a summary of the Initial Contact Milestone status for all Service Requests pending Initial Contact assigned to your District or facility/facilities. Service Request counts are displayed in the following categories:** • Overdue • Due Today • Due 1 Day
C360 Service Request Resolution Report	**The C360 Service Request Resolution Report provides a summary of the Resolution Milestone status for all Service Requests pending Resolution assigned to your District or facility/facilities. Service Request counts are displayed in the following categories:** • Overdue • Due Today • Due in 1 Working Day • Due in 2 Working Days • Due in 3 Working Days
C360 Days Open Report	**The C360 Days Open Report provides a summary of the total days open for all open Service Requests assigned to your District or facility/facilities. Service Request counts are displayed in the following categories:** • Opened Today (created less than 24 hours ago) • Open 1 Day (created between 24 and 48 hours ago) • Open 2 Days (created between 49 and 72 hours ago) • Open 3 Days (created between 73 and 96 hours ago) • Open 4+ Days (created more than 96 hours ago)

Access Dashboards & Reports

The Customer 360 Service Request dashboards and reports are available to Consumer Affairs users from the **Home** and **Dashboards** pages in the console.

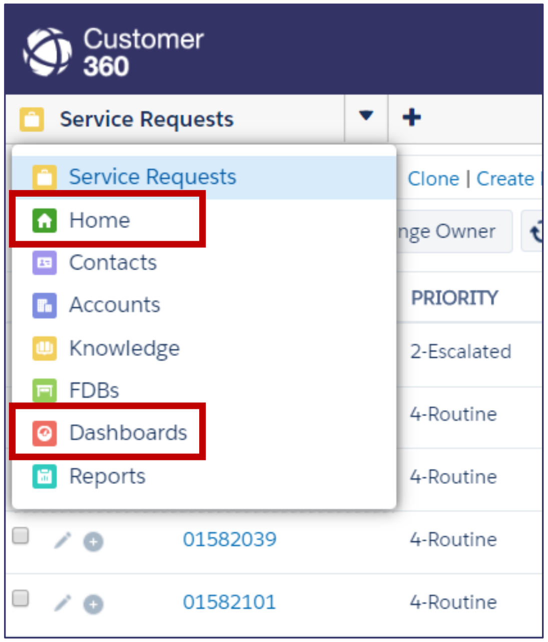
1. Select the **Home** or **Dashboards** button from the **Object Navigation Menu.**

2. Dashboards will appear in a **Dashboard** section on the **Home** page – scroll down below the **Chatter Feed** section and above the **Items to Approve** section.

3. Select a dashboard to open a detailed view of the report – each time a report is opened, the data will refresh automatically.

4. Select the **Refresh** button to update the dashboards – the dashboards displayed on the **Home** page do not refresh automatically. The last refresh date/time will display at the top of the **Dashboard** section (e.g., “As of 6/12/2021 2:39 PM”).

1



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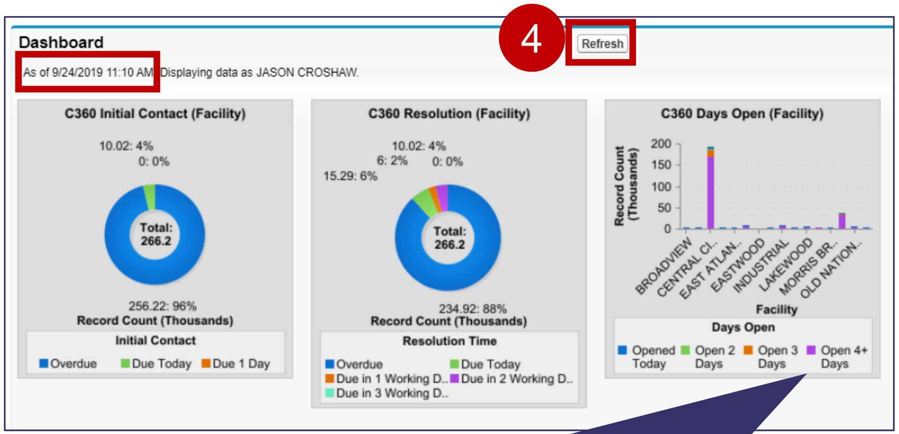

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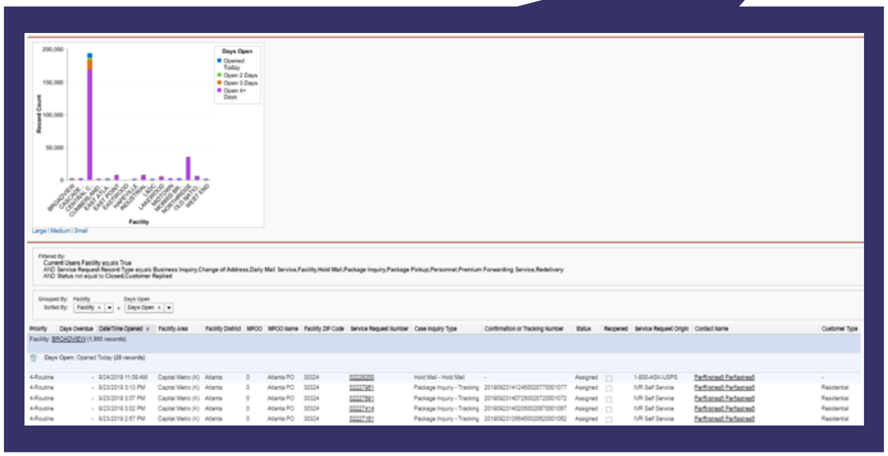


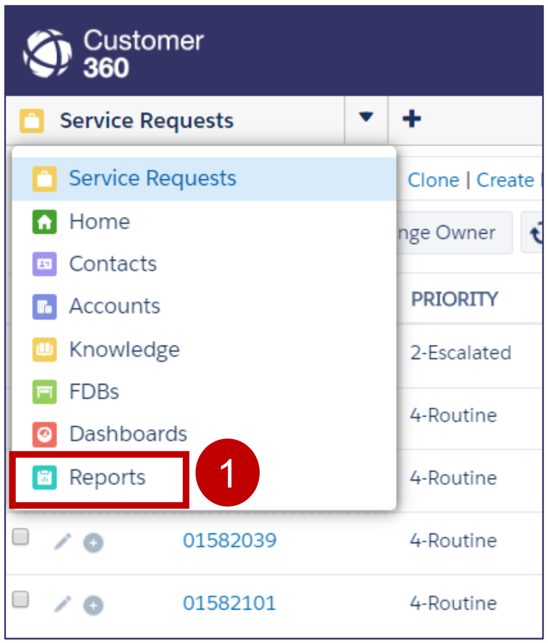
Access Dashboards & Reports (Continued)

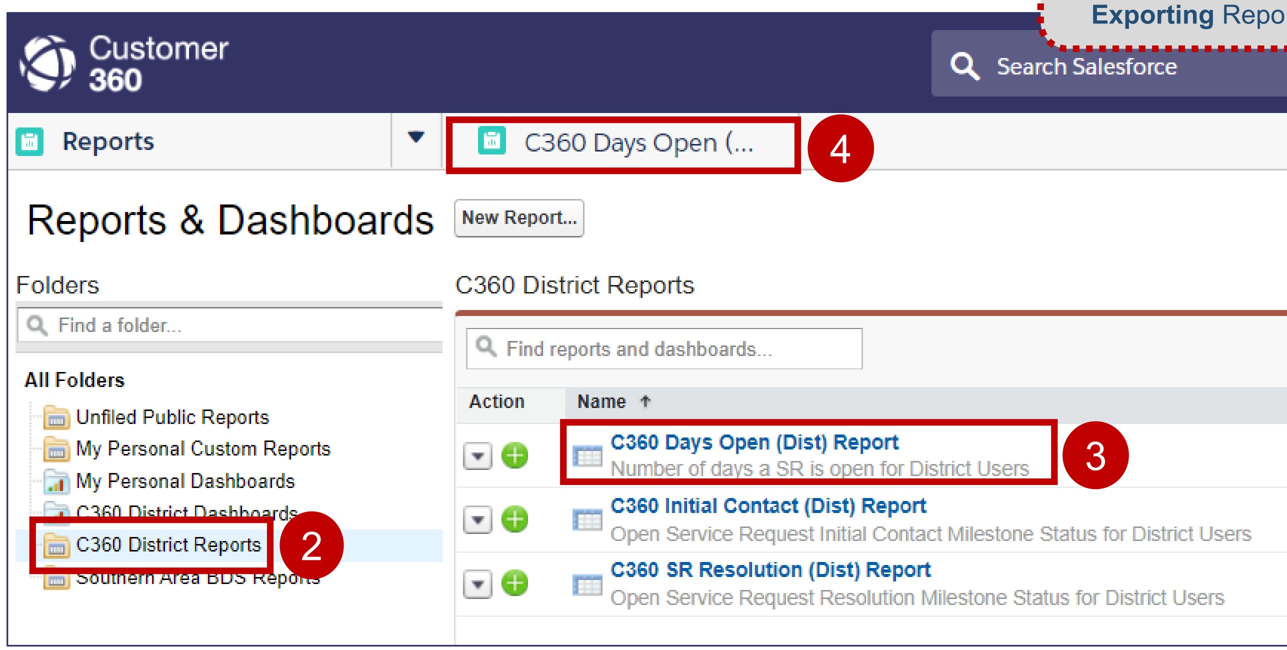
Customer 360

The Customer 360 Service Request reports are also available to Consumer Affairs users from the **Reports** page in the console.

1. Select the **Reports** button from the **Object Navigation Menu.**
2. Select the **C360 District Reports** folder.
3. Select the name of the report you would like to open.
4. The report will open in a separate tab.

Click here to watch a video on **Accessing**, **Navigating** and **Exporting** Reports!



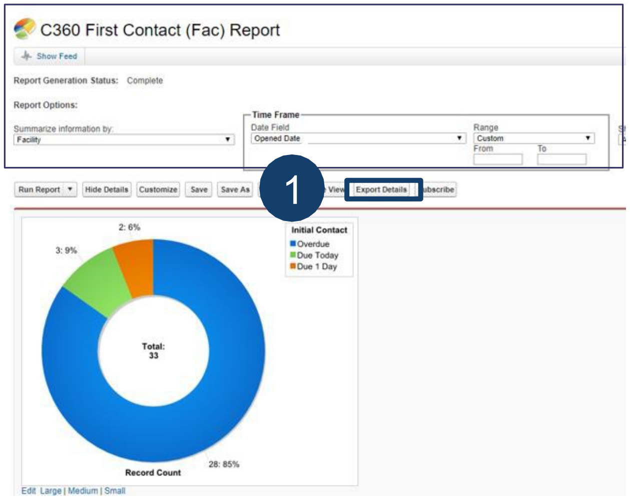


Exporting Reports

Reports can be exported from C360 to Excel. You can select Export Details or Printable View to export the report.

Export Using Export Details

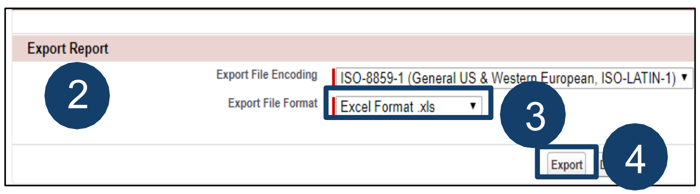
1 Click **Export Details** to open Export Report Popup.



2 **Export Report** popup will display.

3 Select Excel File Format or Comma Delimited (CSV) from the Export File Format dropdown menu.

4 Select **Export.**



An Excel file or Comma Separated Values (.CSV) depending on your selection will download unformatted, raw data. This gives you the ability to filter and sort as desired.

Export Using Printable View

1 Click **Printable View**.

An Excel file will download with Service Request data sorted and grouped as viewed in the online C360 report.

Reports & Dashboards Available

Customer 360

Watch a video on Customizing Reports !

There are several reports resources available in C360. Below is a list of reports available in the C360 District Reports Folder.

- C360 Initial Contact (Dist.) Report
- C360 Resolution (Dist.) Report
- C360 Days Open (Dist.) Report
- C360 Reopened Trend by MPOO (District)
- C360 Service Requests by Status per MPOO (District)
- C360 Compliment Personnel by MPOO
- C360 Complaint Personnel by MPOO
- C360 - Overdue Service Requests (District)
- C360 - Overdue Service Requests by MPOO
- C360 Package Inquiry – (District)
- C360 Root Cause (District)
- Root - Scan Delivered Not Received (District)
- C360 Service Requests in Customer Replied (District)

We have a C360 Reporting Resource Guide, this guide provides a title, location, description and Customer Experience drivers for all reports created by Headquarters for C360 users. *Click here to download it.*

Customer 360

Knowledge Check

Scenario:

You are trying to identify how many Service Requests require Initial Contact completed today, what report would you look to?

Select answer:

1. C360 Days Open Report
2. C360 Root Cause (District)
3. C360 Initial Contact Report
4. C360 - Overdue Service Requests (District)

1/2

Customer 360

Knowledge Check

Scenario:

You are trying to identify how many Service Requests require Initial Contact completed today, what report would you look to?

Select answer:

1. C360 Days Open Report
2. C360 Root Cause (District)
3. C360 Initial Contact Report
4. C360 - Overdue Service Requests (District)

2/2

Automatic Notifications for Urgent Service Request types

Customer 360

Notifications HQ ELT BOG PMG & Congressional Inquiries

High priority Service Requests trigger special alert notifications. Notifications are sent via e-mail and e-mail responses are automatically attached to the Service Request.

HQ ELT BOG PMG Inquiry Email Alerts

Alert Trigger	Alert Description	Audience
Service Request is Manually Re-Routed	Automated alert when Service Request is Manually Re-Routed.	District Consumer Affairs Manager
Service Request Status Remains in Assigned Status	Automated alert every 6 Hours (up to 72 hours).	District Customer Relations Manager and District Consumer Affairs Manager
Service Request Remains in Working Status	Automated alert after 72 hours. Alert continues once a day for up to 7 business days.	District Customer Relations Manager and District Consumer Affairs Manager

Congressional Inquiry Email Alerts

Alert Trigger	Alert Description	Audience
Service Request Routed	Automated alert when Service Request is Routed to the District.	District Customer Relations Manager and District Consumer Affairs Manager.
Service Request Status Remains in Assigned Status	Sent every 12 hours for the first 72 hours.	District Customer Relations Manager and District Consumer Affairs Manager
Service Request Remains in Working Status	Automated alerts after 72 hours. Alert continues once a day for up to 7 business days.	District Customer Relations Manager and District Consumer Affairs Manager

Notifications Cremated Remains

High priority Service Requests trigger special alert notifications. Notifications are sent via e-mail and e-mail responses are automatically attached to the Service Request.

Cremated Remains Inquiry Email Alerts

Alert Trigger	Alert Description	Audience
Service Request Created	An Email alert will be sent out to both the origin and destination offices once the customer has created a Cremated Remains Service Request either online or through 1-800-ASK-USPS.	POMO Distribution List Care Center Management ICCC Supervisors and Designated Agents
Service Request Routed to District Consumer Affairs Office	An Email Alert will be sent out following the Internet Customer Care Center agents determining the correct office to route the case.	Area Vice President, District Manager, District Customer Relations Manager and District Consumer Affairs Manager
Service Request status changes to Working	An email alert will be sent out every 12 hours for the first 5 days after the case has been routed to the office.	Area Vice President, District Manager, District Customer Relations Manager and District Consumer Affairs Manager Care Center Management ICCC Supervisors and Designated Agents
Service Request status changes to Closed	An email alert will be sent out once a week for the first 4 weeks after the case has been worked on if the Service Request status has not updated to closed	Area Vice President, District Manager, District Customer Relations Manager and District Consumer Affairs Manager Care Center Management ICCC Supervisors and Designated Agents

Customer 360

Knowledge Check

Scenario:

A Cremated Remains Service Request has been created. Who will receive an Email Alert for this Service Request?

Select answer:

1. Area Vice President, District Manager, District Customer Relations Manager and District Consumer Affairs Manager, Care Center Management, ICCC Supervisors and Designated Agents for origin offices.
2. POMO Distribution List, Customer Care Center Management, ICCC Supervisors and Designated Agents for origin and destination offices.
3. POMO Distribution List, Customer Care Center Management, ICCC Supervisors and Designated Agents for destination offices.
4. Area Vice President, District Manager, District Customer Relations Manager and District Consumer Affairs Manager, Care Center Management, ICCC Supervisors and Designated Agents for destination offices.

1/2

Knowledge Check

Customer 360

Scenario:
A Cremated Remains Service Request has been created. Who will receive an Email Alert for this Service Request?

Select answer:

1. Area Vice President, District Manager, District Customer Relations Manager and District Consumer Affairs Manager, Care Center Management, ICCC Supervisors and Designated Agents for origin offices.
2. POMO Distribution List, Customer Care Center Management, ICCC Supervisors and Designated Agents for origin and destination offices.
3. POMO Distribution List, Customer Care Center Management, ICCC Supervisors and Designated Agents for destination offices.
4. Area Vice President, District Manager, District Customer Relations Manager and District Consumer Affairs Manager, Care Center Management, ICCC Supervisors and Designated Agents for destination offices.

2/2

Customer 360

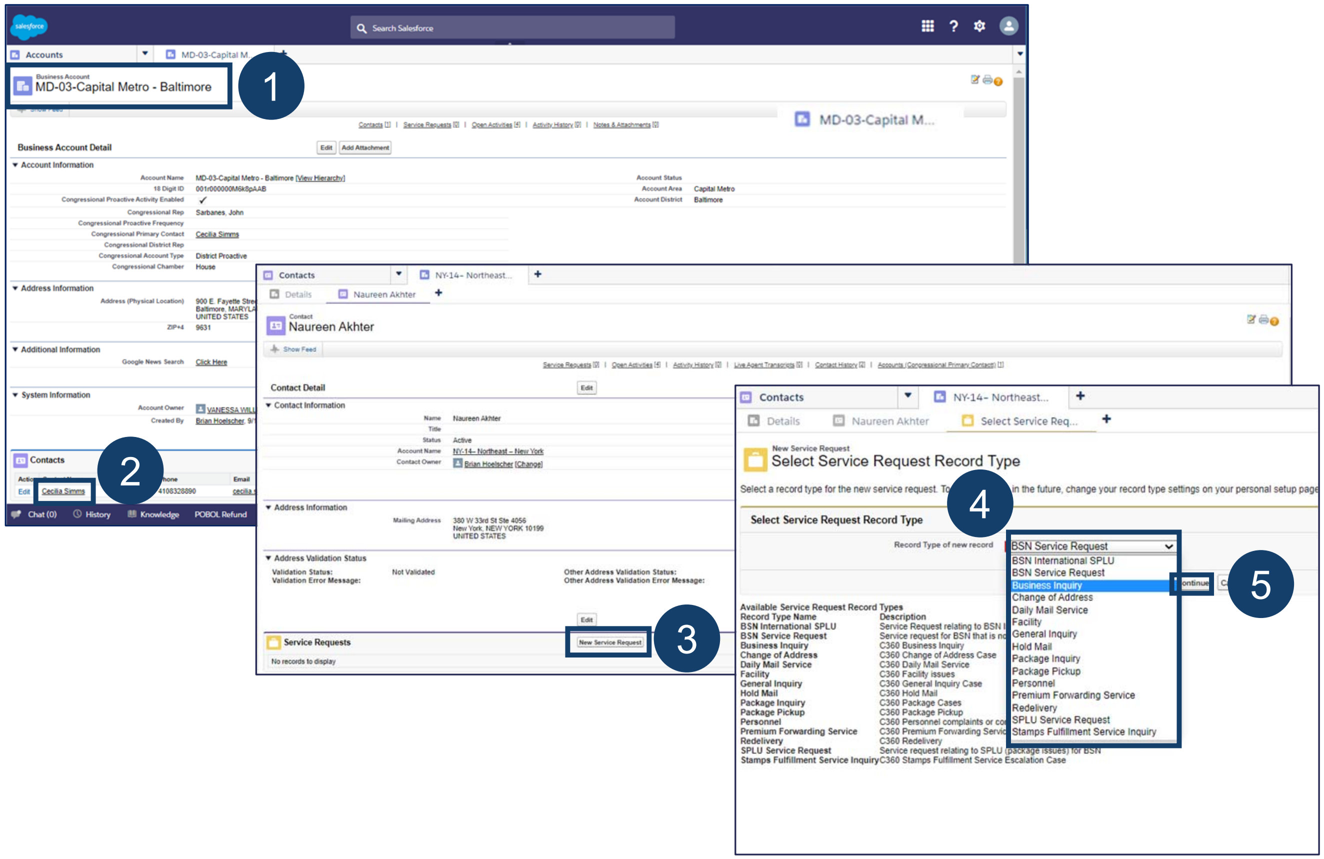
Congressional Inquiries

Creating a Congressional Inquiry Service Request

Customer 360

Congressional Inquiries can be created by Staffers through the Congressional Portal or District Consumer Affairs users in C360. To create a Congressional Inquiry Service Request in C360, Consumer Affairs users should complete the following steps:

1. Navigate to the Congressional Account in C360.
2. Scroll down to the Contacts section and select **the contact** you want to associate with the Service Request**.**
3. Select **New Service Request** on the Contact Account page to open the New Service Request Record type page.
4. Select **the Service Request Record type** using the drop-down menu.
5. **Select Continue** to enter the New Service Request page.



Customer 360

To create a Congressional Inquiry Service Request, Users should complete the previous and the following steps:

Enter the Service Request information where appropriate.

Select **Congressional Inquiry** as the Service Request Origin from the Service Request Origin dropdown menu.

Select appropriate Sub-issue 1 value.

Select Save to save the Congressional Inquiry Service Request to the Congressional Contact.