FSU Service Center
Constituent 360-Degree View

Overview:

Understanding How to Use the Constituent 360-Degree View

This feature of the FSU Service Desk will give an agent the ability to search for a customer, view a list of a customer cases, view customer interactions and add a new case.

Procedure

Scenario:
In this topic, you will learn the steps to utilize Constituent 360-Degree View.

This topic will cover the following:

- Searching for a Customer
- Viewing Customer interactions and case history
- Opening a new case for the customer

Key Information:
Adding a New Case via Analyst Service Center
Viewing Worklist for a Provider Group
Assigning Case to an Agent
### Step 1
Click the **Main Menu** button.

| Main Menu |

### Step 2
Click the **Constituent 360-Degree View** menu.

| Constituent 360-Degree View |

### Step 3
Enter the appropriate search criteria.

For the purpose of this example, in the **First Name** field, enter "**Caller**".

### Step 4
Click the **Search** button.
5. Select the appropriate Customer name under the **Search Results**.
   
   For the purpose of this example, click the **Caller** link.

6. The **Constituent 360-Degree View** is a snapshot of this customer's activity.
   
   From here, you can view the customer's case history, interactions, or open a new case.

7. **Decision:** Please make a selection from the options listed below.
   
   - Look at customer interactions and existing case history
     
     Go to step 8 on page 4
   
   - Open a new case for this customer
     
     Go to step 14 on page 6
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<th>Step</th>
<th>Action</th>
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<tr>
<td>8.</td>
<td>Click the folder to expand the view of this customer's Interactions.</td>
</tr>
<tr>
<td>9.</td>
<td>Click the appropriate date range to view a list of interactions. For the purpose of this example, click the 3 - Last Week - (5) link.</td>
</tr>
</tbody>
</table>
| 10.  | For the purpose of this example, we will view the open cases for this customer by click the Open - (1) link.  
NOTE: You can also view the customers closed cases by clicking the Closed link. Secure Cases that you cannot view will be listed under Unauthorized Cases. |
<p>| 11.  | Click on the appropriate Case ID. For the purpose of this example, click the 220956 link. |</p>
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<tr>
<td>12.</td>
<td>Click the <strong>Home</strong> link.</td>
</tr>
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</table>
| 13.  | **Congratulations!**  
You have completed this topic.  
**End of Procedure.**  
Remaining steps apply to other paths. |
Step 14. Click the **Go** button.
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<tr>
<td>15.</td>
<td><strong>Click the Category list.</strong></td>
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Select the appropriate **Category** for this case.

For the purpose of this example, click the **CASS list item.**
Step 17. Click the **Specialty Type** list.
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</table>
| 18.  | Click the appropriate **Specialty Type** for this case.  
For the purpose of this example, click the **Alarms** list item. |
| 19.  | Click the **Source** list. |
Step 20. Select the appropriate **Source** of contact.

For the purpose of this example click the **Telephone** list item.
21. **Click in the Problem Summary field.**

22. **Enter the appropriate information into the Problem Summary field.**
   
   For the purpose of this example enter "Alarm reported in Building 1".

23. **Enter the appropriate information into the Description field.**
   
   For the purpose of this example enter "Alarm Reported in Building 1. Please respond."

24. **Click the Save button.**

25. **Click the Home link.**

26. **Congratulations!**
   You have completed this topic.

   **End of Procedure.**