Salesforce 3.0

As we continue improving our processes to optimize the PODS Customer Experience, Salesforce 3.0 is being released to upgrade service and customer satisfaction, as well as to enhance the day-to-day experience for our front-line sales and service associates.

New Request Categories:

With this release, Salesforce 3.0 has 30+ new case types. Each of the cases will fall into one of five new Request Categories. They are as follows, each with its Definition:

1. Location Action - Used when there's action/or information needed from the location.

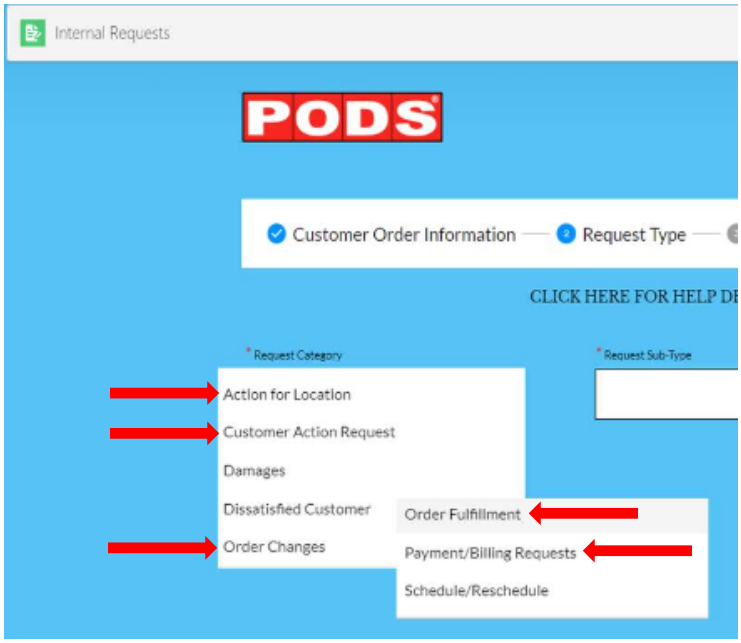
2. **Customer Action** - Used for customer request i.e., Placement regulations question. This category would also be used by the location if new information is needed from the customer.

3. Order Changes - Choose this category to notify the location of time-sensitive changes to an order.

4. Order Fulfillment- Use this category to notify logistics of Manifest Changes, which retires email templates.

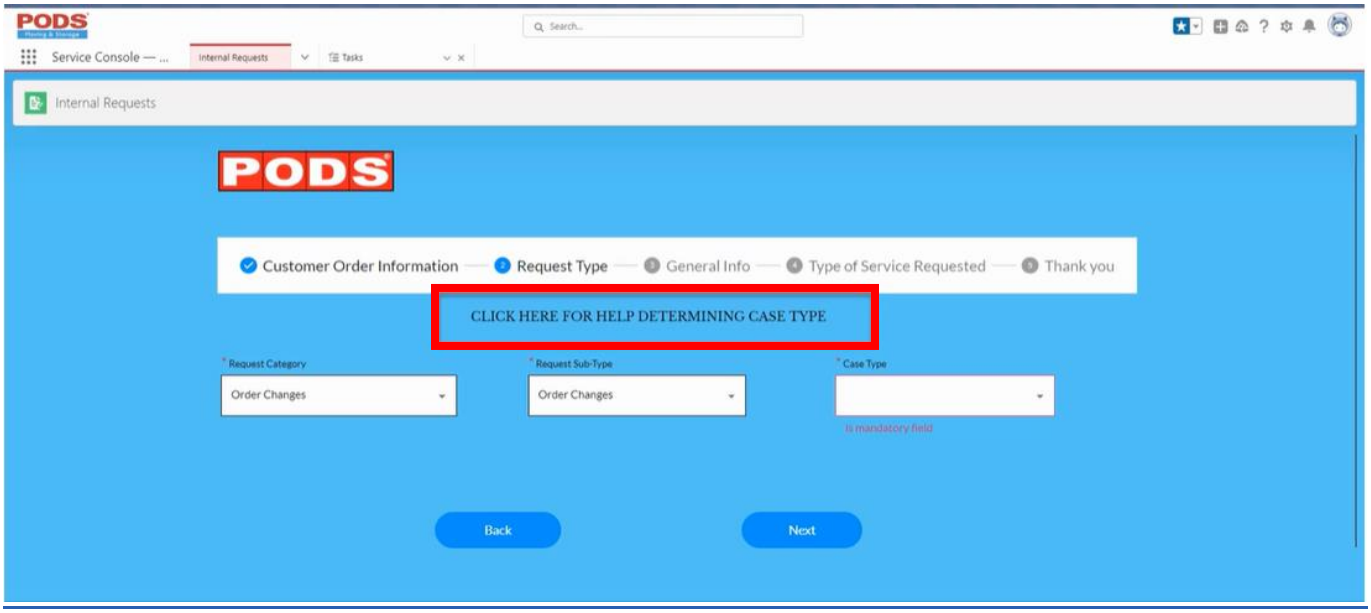
5. Payment/Billing Request- Choose this category to request an action or information regarding payments or billing.

You'll see the new Categories in Salesforce **Internal Requests** as follows:

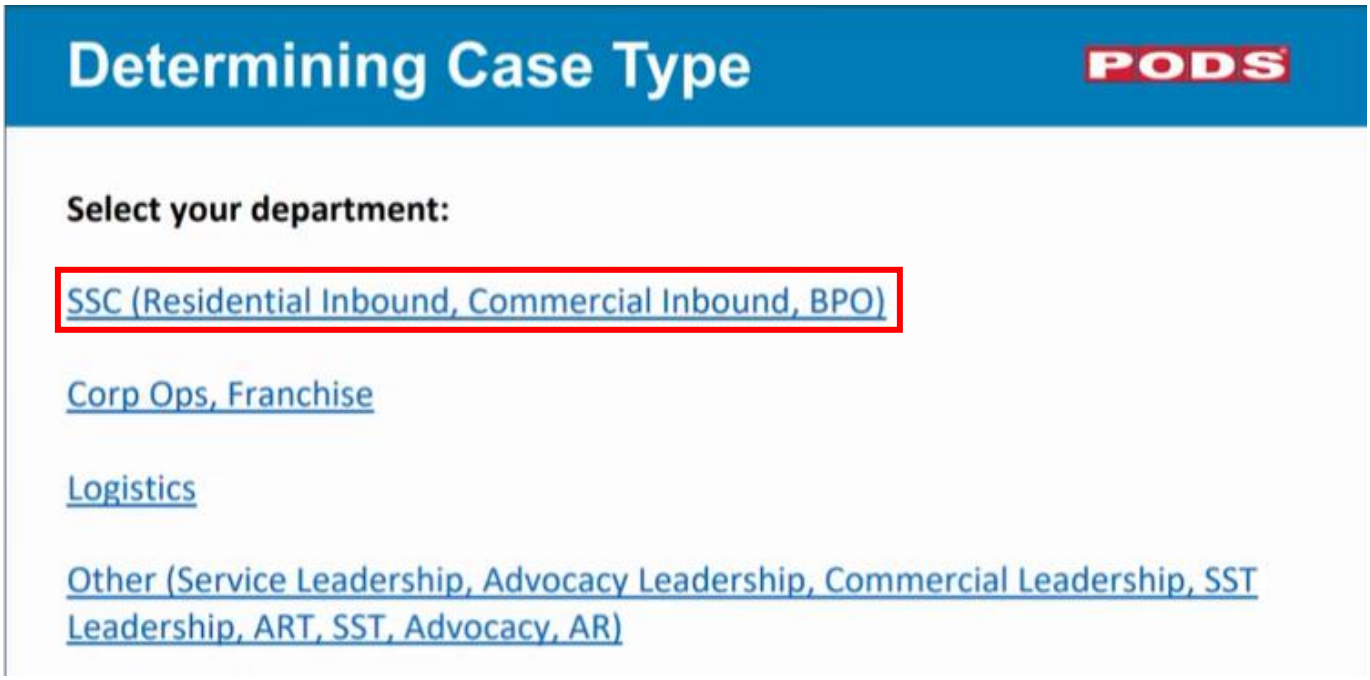


Locating Case Types:

While in the Internal Request screen, should you have difficulty determining which Case Type best represents the customer's issue, simply click the "Help Determining Case Type" link in the middle of the screen:

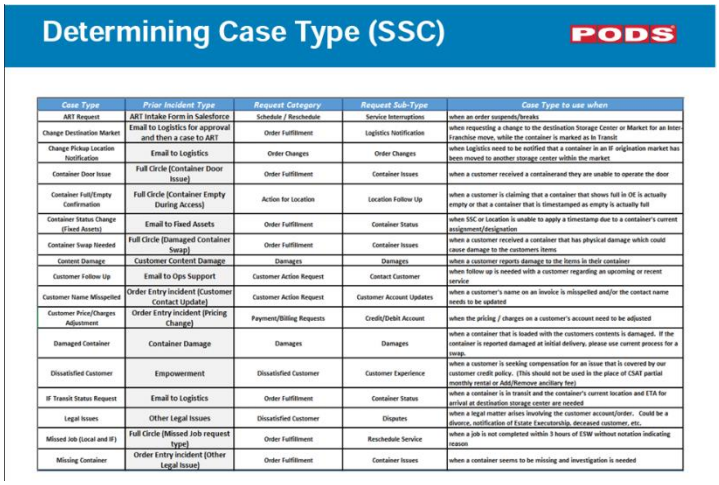


You will then see a selection screen of various PODS Departments. Select the SSC link:



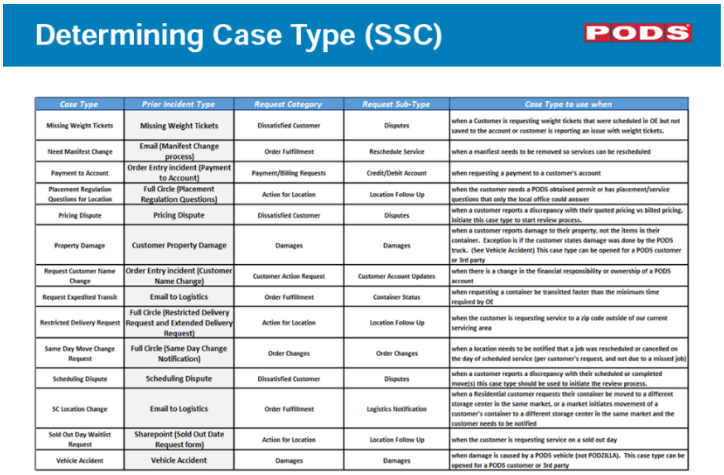
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Once the link has been selected, you will see a matrix of Case Types, Prior Incident Type, Request Category, Request Sub-Type, and a description of when to use a particular Case Type:



Determining Case Type (SSC) PODS

Case Type	Prior Incident Type	Request Category	Request Sub-Type	Case Type to use when
ART Request	ART Intake Form in Salesforce	Schedule / Reschedule	Service Interruptions	when an order suspends/breaks
Change Destination Market	Email to Logistics for approval and then a case to ART	Order Fulfillment	Logistics Notification	when requesting a change to the destination Storage Center or Market for an Inter-Franchise move, while the container is marked as In Transit
Change Pickup Location Notification	Email to Logistics	Order Changes	Order Changes	when Logistics need to be notified that a container in an IF origination market has been moved to another storage center within the market
Container Door Issue	Full Circle (Container Door Issue)	Order Fulfillment	Container Issues	when a customer received a containerand they are unable to operate the door
Container Full/Empty Confirmation	Full Circle (Container Empty During Access)	Action for Location	Location Follow Up	when a customer is claiming that a container that shows full in OE is actually empty or that a container that is timestamped as empty is actually full
Container Status Change (Fixed Assets)	Email to Fixed Assets	Order Fulfillment	Container Status	when SSC or Location is unable to apply a timestamp due to a container's current assignment/designation
Container Swap Needed	Full Circle (Damaged Container Swap)	Order Fulfillment	Container Issues	when a customer received a container that has physical damage which could cause damage to the customers items
Content Damage	Customer Content Damage	Damages	Damages	when a customer reports damage to the items in their container
Customer Follow Up	Email to Ops Support	Customer Action Request	Contact Customer	when follow up is needed with a customer regarding an upcoming or recent service
Customer Name Misspelled	Order Entry incident (Customer Contact Update)	Customer Action Request	Customer Account Updates	when a customer's name on an invoice is misspelled and/or the contact name needs to be updated
Customer Price/Charges Adjustment	Order Entry incident (Pricing Change)	Payment/Billing Requests	Credit/Debit Account	when the pricing / charges on a customer's account need to be adjusted
Damaged Container	Container Damage	Damages	Damages	when a container that is loaded with the customers contents is damaged. If the container is reported damaged at initial delivery, please use current process for a swap.
Dissatisfied Customer	Empowerment	Dissatisfied Customer	Customer Experience	when a customer is seeking compensation for an issue that is covered by our customer credit policy. (This should not be used in the place of CSAT partial monthly rental or Add/Remove ancillary fee)
IF Transit Status Request	Email to Logistics	Order Fulfillment	Container Status	when a container is in transit and the container's current location and ETA for arrival at destination storage center are needed
Legal Issues	Other Legal Issues	Dissatisfied Customer	Disputes	when a legal matter arises involving the customer account/order. Could be a divorce, notification of Estate Executorship, deceased customer, etc.
Missed Job (Local and IF)	Full Circle (Missed Job request type)	Order Fulfillment	Reschedule Service	when a job is not completed within 3 hours of ESW without notation indicating reason
Missing Container	Order Entry incident (Other Legal Issue)	Order Fulfillment	Container Issues	when a container seems to be missing and investigation is needed



Determining Case Type (SSC) PODS

Case Type	Prior Incident Type	Request Category	Request Sub-Type	Case Type to use when
Missing Weight Tickets	Missing Weight Tickets	Dissatisfied Customer	Disputes	when a Customer is requesting weight tickets that were scheduled in OE but not saved to the account or customer is reporting an issue with weight tickets.
Need Manifest Change	Email (Manifest Change process)	Order Fulfillment	Reschedule Service	when a manifest needs to be removed so services can be rescheduled
Payment to Account	Order Entry incident (Payment to Account)	Payment/Billing Requests	Credit/Debit Account	when requesting a payment to a customer's account
Placement Regulation Questions for Location	Full Circle (Placement Regulation Questions)	Action for Location	Location Follow Up	when the customer needs a PODS obtained permit or has placement/service questions that only the local office could answer
Pricing Dispute	Pricing Dispute	Dissatisfied Customer	Disputes	when a customer reports a discrepancy with their quoted pricing vs billed pricing. Initiate this case type to start review process.
Property Damage	Customer Property Damage	Damages	Damages	when a customer reports damage to their property, not the items in their container. Exception is if the customer states damage was done by the PODS truck. (See Vehicle Accident) This case type can be opened for a PODS customer or 3rd party
Request Customer Name Change	Order Entry incident (Customer Name Change)	Customer Action Request	Customer Account Updates	when there is a change in the financial responsibility or ownership of a PODS account
Request Expedited Transit	Email to Logistics	Order Fulfillment	Container Status	when requesting a container be transited faster than the minimum time required by OE
Restricted Delivery Request	Full Circle (Restricted Delivery Request and Extended Delivery Request)	Action for Location	Location Follow Up	when the customer is requesting service to a zip code outside of our current servicing area
Same Day Move Change Request	Full Circle (Same Day Change Notification)	Order Changes	Order Changes	when a location needs to be notified that a job was rescheduled or cancelled on the day of scheduled service (per customer's request, and not due to a missed job)
Scheduling Dispute	Scheduling Dispute	Dissatisfied Customer	Disputes	when a customer reports a discrepancy with their scheduled or completed move(s) this case type should be used to initiate the review process.
SC Location Change	Email to Logistics	Order Fulfillment	Logistics Notification	when a Residential customer requests their container be moved to a different storage center in the same market, or a market initiates movement of a customer's container to a different storage center in the same market and the customer needs to be notified
Sold Out Day Waitlist Request	Sharepoint (Sold Out Date Request form)	Action for Location	Location Follow Up	when the customer is requesting service on a sold out day
Vehicle Accident	Vehicle Accident	Damages	Damages	when damage is caused by a PODS vehicle (not PODZILLA). This case type can be opened for a PODS customer or 3rd party

Select the appropriate Case Type for the customer and complete the Internal Request form. Then Submit.

Important Changes:

Order Entry: All incidents formerly opened in Order Entry will now be created as Cases in Salesforce.

Email Templates: Logistics email templates will no longer be used. Instead, create a new Salesforce Case to notify Logistics of Manifest Changes.

Full Circle: Most Full Circle requests/notifications will remain in Full Circle, only a few will be replaced by Salesforce processes at the present time.

Sold Out Requests: The SharePoint Sold Out Request form is being retired and is now found in Salesforce Case Types.

Remember, Salesforce 3.0 goes **LIVE** Monday, April 24th!