



# End User Guide

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# Introduction to VeloCITY 365

VeloCITY 365 by KPMG provides automated workflows that enable municipalities to manage citizen inquiries and service requests in the cloud. Velocity 365 is built on the Microsoft Dynamics 365 platform, and provides a Citizen Engagement Portal that citizens can access to search and find information on municipal programs and services. Using the Agent Console, call center agents can efficiently document citizen inquiries, identify duplicate requests, and route service requests to the appropriate department for action and follow-up, while tracking the progress of the request through to completion.

# Agent Console Overview

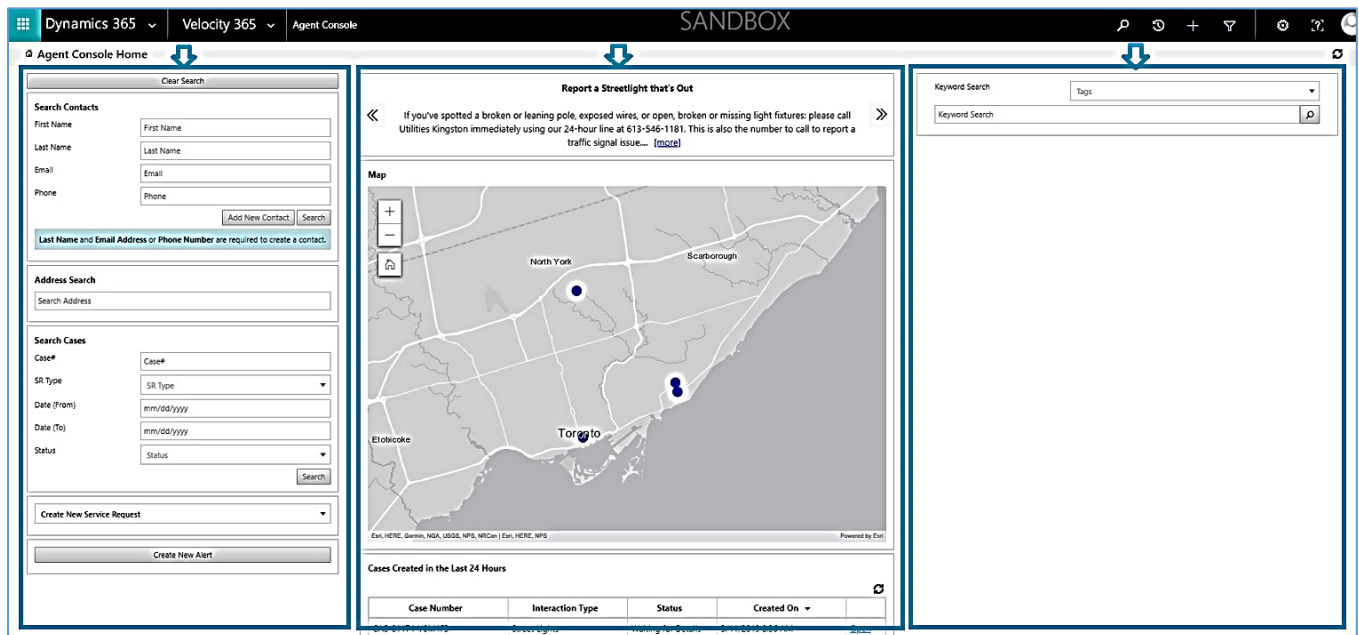
The Agent Console is the single point of entry for call center agents to access interconnected information. It provides a 360 degree view of the caller's contact information, along with any previous interaction history including phone calls, service requests and their resolutions and notes. This allows the caller to only have to "tell their story once" and prevent the dreaded hand-off to another call center agent, which improves call handling satisfaction for both the citizen and the call center agent.

The Agent Console is a single window consisting of three panes:

This is the search pane for contacts facilitating searching by name, phone or email as applicable.

This pane contains the details about the current case the caller is phoning about

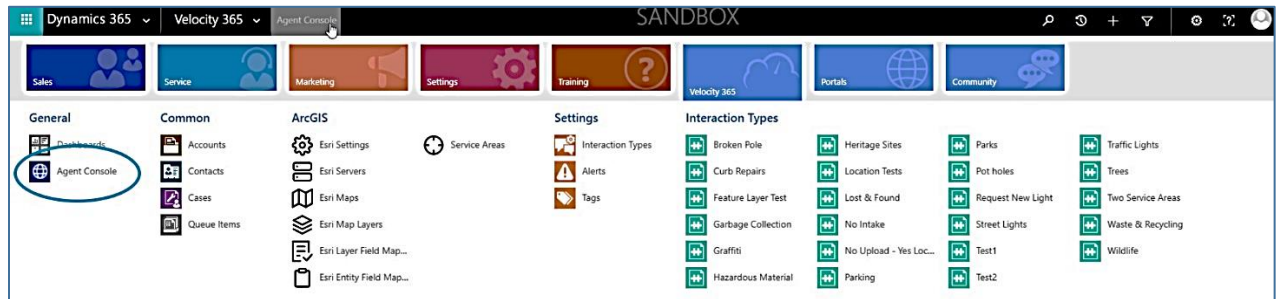
This pane contains knowledge base articles relative to the case and may also contain call scripting



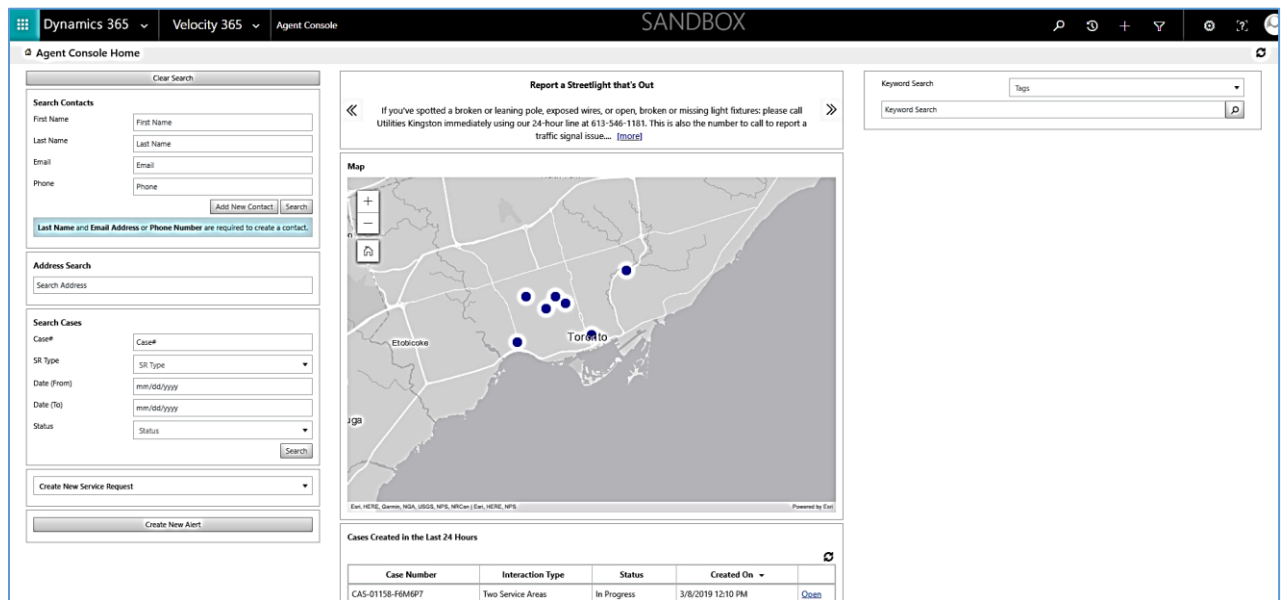
The call center agent can also open tabs from the middle pane to access existing information in Dynamics 365.

## How to Log into the Agent Console

Once you have logged into Dynamics 365, navigate to **Velocity 365** and then select **Agent Console** as shown.



The Agent Console Home screen appears.





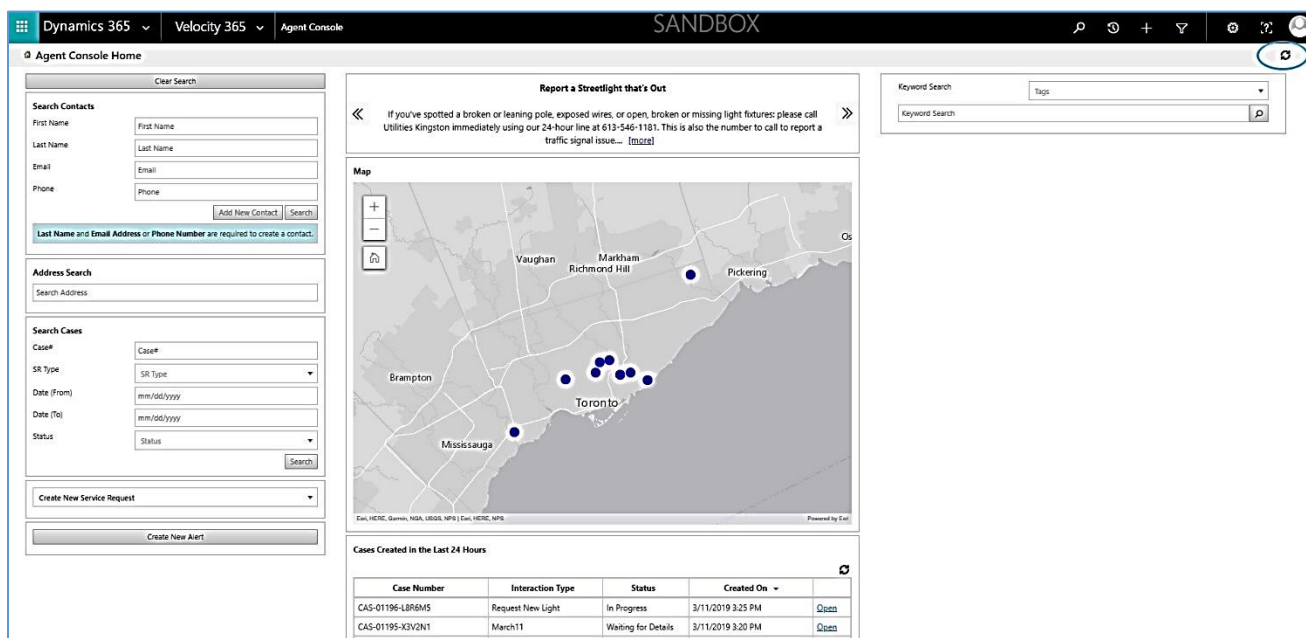
## How to Log out of the Agent Console

To log out of the Agent Console, click on the user icon in the top right corner then select **Sign out**.



## Navigating the Agent Console Screen

When navigating in the Agent Console, new contacts or cases open up in tabs within the Agent Console home screen. The most recent tab is always shown on the left and you can click on any of the tabs to take you to that specific tab. You can close any one tab by clicking on the “x” beside the tab name. You can also close all tabs and completely refresh the home screen by clicking on the refresh icon in the top right hand corner of the screen.






# Managing Contacts

## Searching for an Existing Contact

To search for an existing contact, you can enter information that is available into any of the search fields (first name, last name, email or phone) and click on the **Search** button to execute your search. Example: If you search on first name of “Tom”, all contact records with that first name are displayed and you can select the correct record.

 **TIP:** You can search on any phone number (i.e. home or cell) and as long as that number is associated with a contact, the resulting record will be displayed.

Dynamics 365
Velocity 365
Agent Console

SANDBOX

Agent Console Home

Clear Search

Search Contacts

First Name

tom

Last Name

Last Name

Email

Email

Phone

Phone

Add New Contact

Search

Last Name and Email Address or Phone Number are required to create a contact.

Address Search

Search Address

Search Cases

Case#

Case#

SR Type

SR Type

Date (From)

mm/dd/yyyy

Date (To)

mm/dd/yyyy

Status

Status

Search

Create New Service Request

Create New Alert

Report a Streetlight that's Out

<<

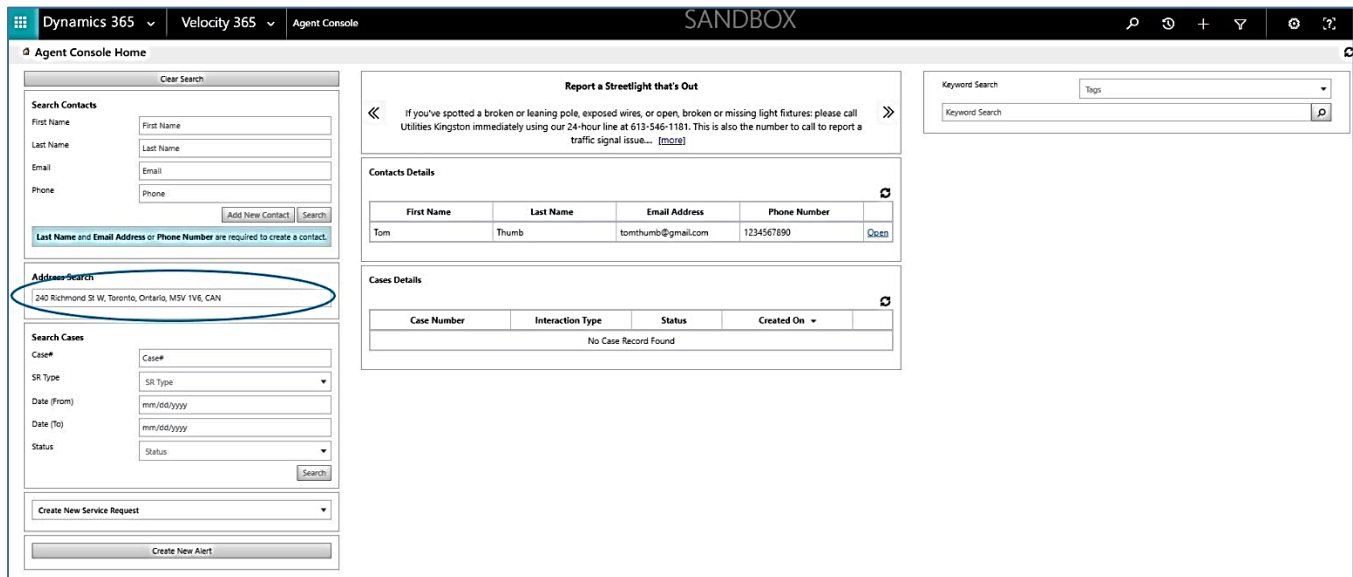
If you've spotted a broken or leaning pole, exposed wires, or open, broken or missing light fixtures: please call Utilities Kingston immediately using our 24-hour line at 613-546-1181. This is also the number to call to report a traffic signal issue.... [\[more\]](#)

>>

Contacts Details

First Name	Last Name	Email Address	Phone Number	
Tom	Spratt	tomspratt@gmail.com	1234567892	<a href="#">Open</a>
Tom	Tooley	tomtooley@gmail.com	1234567891	<a href="#">Open</a>
Tom	Thumb	tomthumb@gmail.com	1234567890	<a href="#">Open</a>

You can also search for a contact by street address by entering the address in the **Address Search** field and any contacts (or cases) associated with that address are returned as shown.



**Agent Console Home**

**Search Contacts**

First Name:   
 Last Name:   
 Email:   
 Phone:   
 Add New Contact Search

**Address Search**

240 Richmond St W, Toronto, Ontario, M5V 1V6, CAN

**Search Cases**

Case#:   
 SR Type:   
 Date (From): mm/dd/yyyy  
 Date (To): mm/dd/yyyy  
 Status:   
 Search

**Report a Streetlight that's Out**

If you've spotted a broken or leaning pole, exposed wires, or open, broken or missing light fixtures: please call Utilities Kingston immediately using our 24-hour line at 613-546-1181. This is also the number to call to report a traffic signal issue... [more]

**Contacts Details**

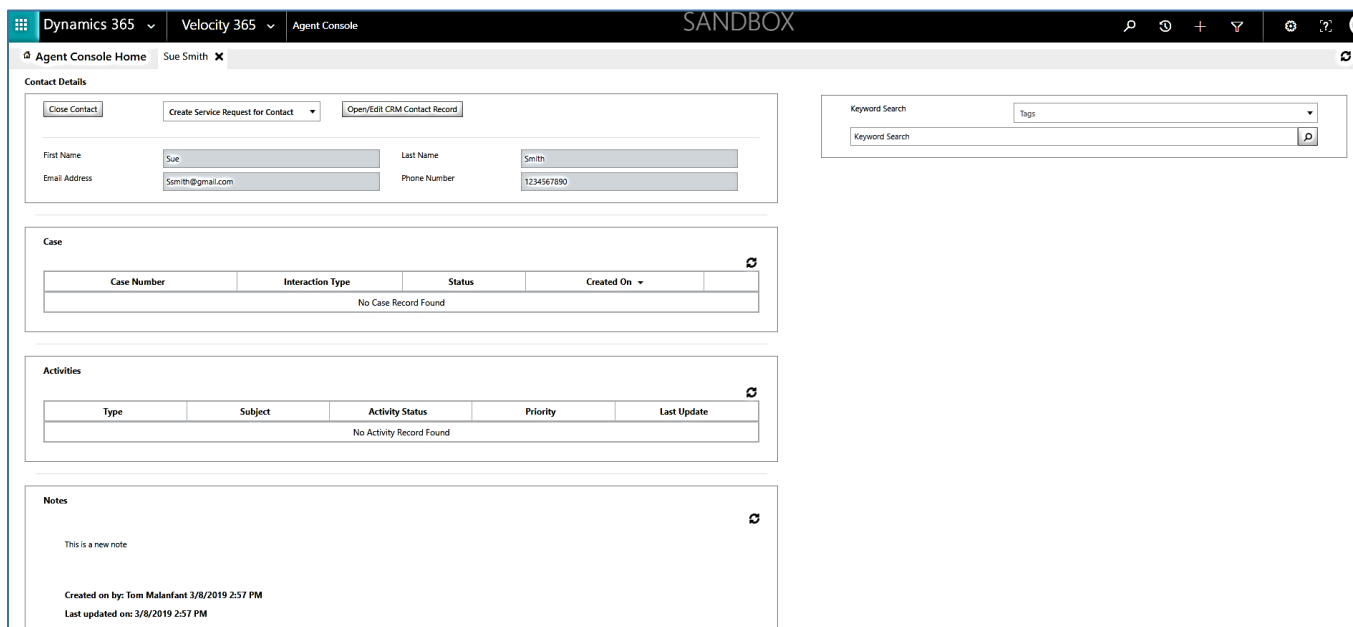
First Name	Last Name	Email Address	Phone Number	
Tom	Thumb	tomthumb@gmail.com	1234567890	Close

**Cases Details**

Case Number	Interaction Type	Status	Created On	
No Case Record Found				

## Adding/Updating Notes to an Existing Contact

To add notes to an existing contact, once the contact is open on the Contact Details page you can add notes by entering the notes in the “Notes” section and clicking on the <save> button. The screen will update showing the user who entered/updated the notes and the time of creation and updating. This is the only area of the contact that can be updated directly from the Contact Details screen and the remaining details can be updated directly in Dynamics by editing the contact record as shown below.



**Agent Console Home** Sue Smith

**Contact Details**

Close Contact Create Service Request for Contact Open/Edit CRM Contact Record

First Name: Sue Last Name: Smith  
 Email Address: smith@gmail.com Phone Number: 1234567890

**Case**

Case Number	Interaction Type	Status	Created On	
No Case Record Found				

**Activities**

Type	Subject	Activity Status	Priority	Last Update
No Activity Record Found				

**Notes**

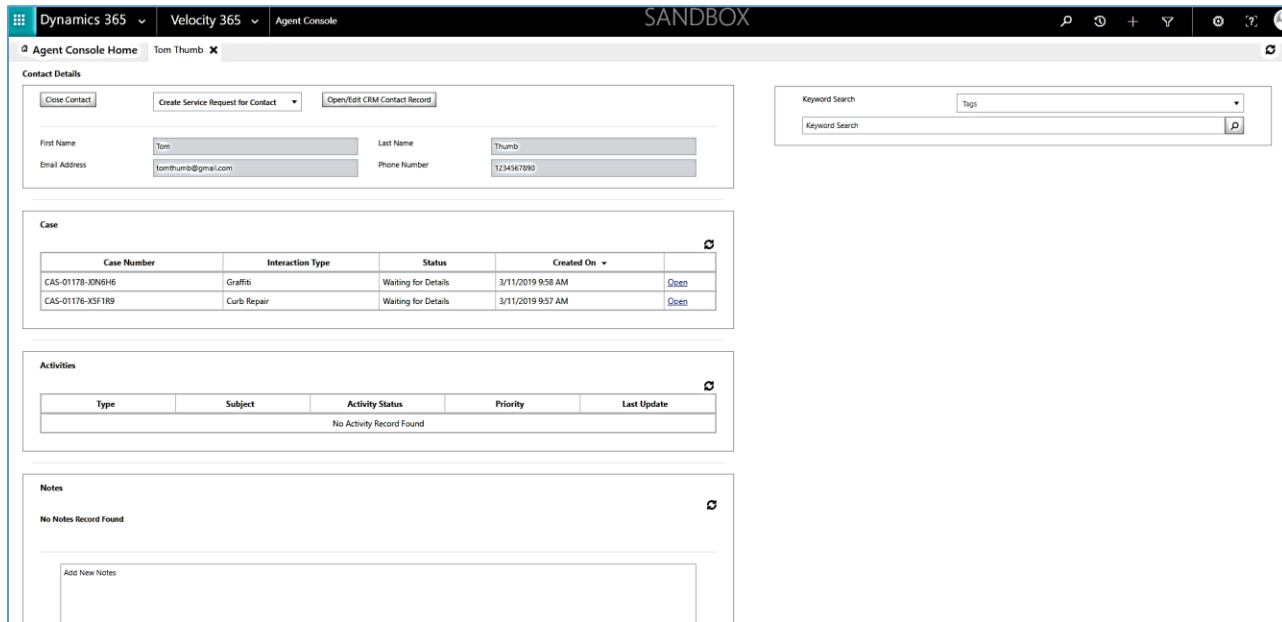
This is a new note

Created on by: Tom Malenfant 3/8/2019 2:57 PM  
 Last updated on: 3/8/2019 2:57 PM

## Editing an Existing Contact

Detailed training on editing contact records is part of the Dynamics 365 for Customer Service training and not covered in this guide.

Once a contact has been selected, the following Contact Details screen is displayed.

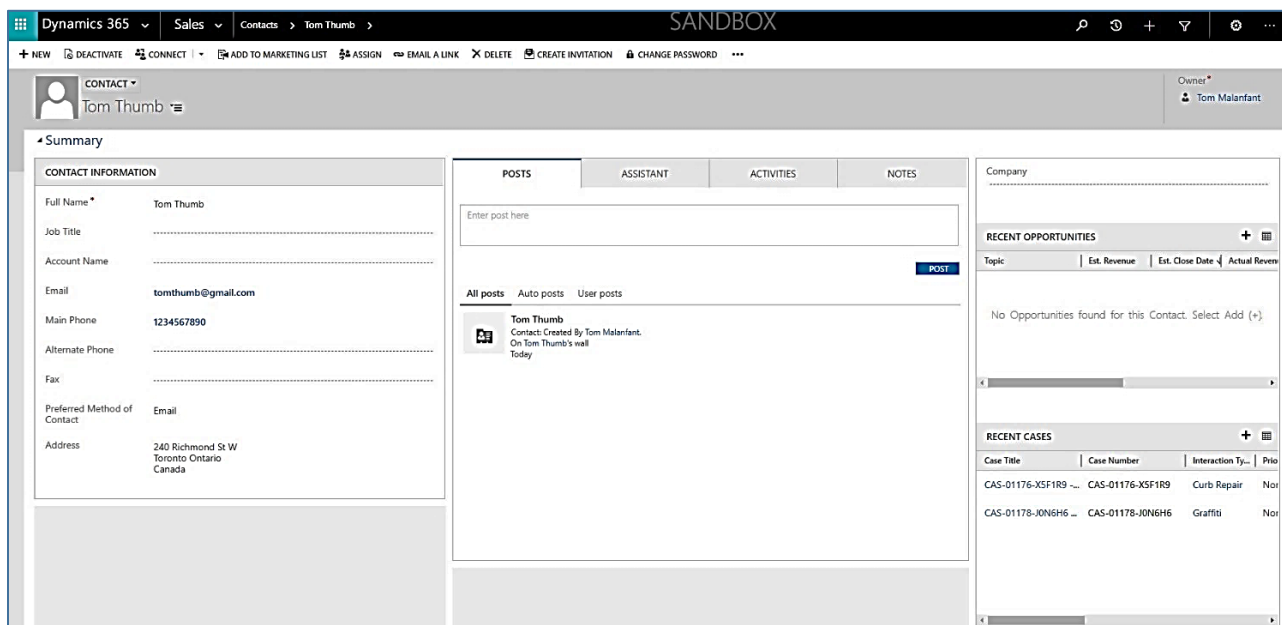


The screenshot shows the 'Contact Details' screen in the Dynamics 365 Agent Console. The top navigation bar includes 'Dynamics 365', 'Velocity 365', and 'Agent Console'. The main header shows 'SANDBOX' and a search bar. The contact name 'Tom Thumb' is displayed at the top left. Below the name, there are buttons for 'Close Contact', 'Create Service Request for Contact', and 'Open/Edit CRM Contact Record'. The contact information is displayed in a form with fields for First Name (Tom), Last Name (Thumb), Email Address (tomthumb@gmail.com), and Phone Number (1234567890). To the right, there is a 'Keyword Search' section with a 'Tags' dropdown and a search button. Below the contact information, there are three sections: 'Case', 'Activities', and 'Notes'. The 'Case' section contains a table with two rows of case data. The 'Activities' section shows a table with columns for Type, Subject, Activity Status, Priority, and Last Update, but it indicates 'No Activity Record Found'. The 'Notes' section also indicates 'No Notes Record Found' and has a text area for 'Add New Notes'.

Case Number	Interaction Type	Status	Created On	
CAS-01178-JON6H6	Graffiti	Waiting for Details	3/11/2019 9:58 AM	<a href="#">Open</a>
CAS-01176-XSF1R9	Curb Repair	Waiting for Details	3/11/2019 9:57 AM	<a href="#">Open</a>

Type	Subject	Activity Status	Priority	Last Update
No Activity Record Found				

To edit the contact record, click on the **Open/Edit CRM Contact Record** button and the specific details for that contact are displayed.



The screenshot shows the 'CONTACT' record for 'Tom Thumb' in the Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Contacts > Tom Thumb'. The main header shows 'SANDBOX' and a search bar. The contact name 'Tom Thumb' is displayed at the top left. Below the name, there are buttons for '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', 'DELETE', 'CREATE INVITATION', and 'CHANGE PASSWORD'. The contact information is displayed in a form with fields for Full Name (Tom Thumb), Job Title, Account Name, Email (tomthumb@gmail.com), Main Phone (1234567890), Alternate Phone, Fax, Preferred Method of Contact (Email), and Address (240 Richmond St W, Toronto Ontario, Canada). To the right, there is a 'RECENT OPPORTUNITIES' section with a table showing no opportunities found. Below that, there is a 'RECENT CASES' section with a table showing two cases. The 'CONTACT' record is also displayed in a 'POSTS' section with a text area for 'Enter post here' and a 'POST' button. The 'CONTACT' record is also displayed in a 'SUMMARY' section with a table showing contact information.

Case Title	Case Number	Interaction Type	Prio
CAS-01176-XSF1R9 ...	CAS-01176-XSF1R9	Curb Repair	Not
CAS-01178-JON6H6 ...	CAS-01178-JON6H6	Graffiti	Not

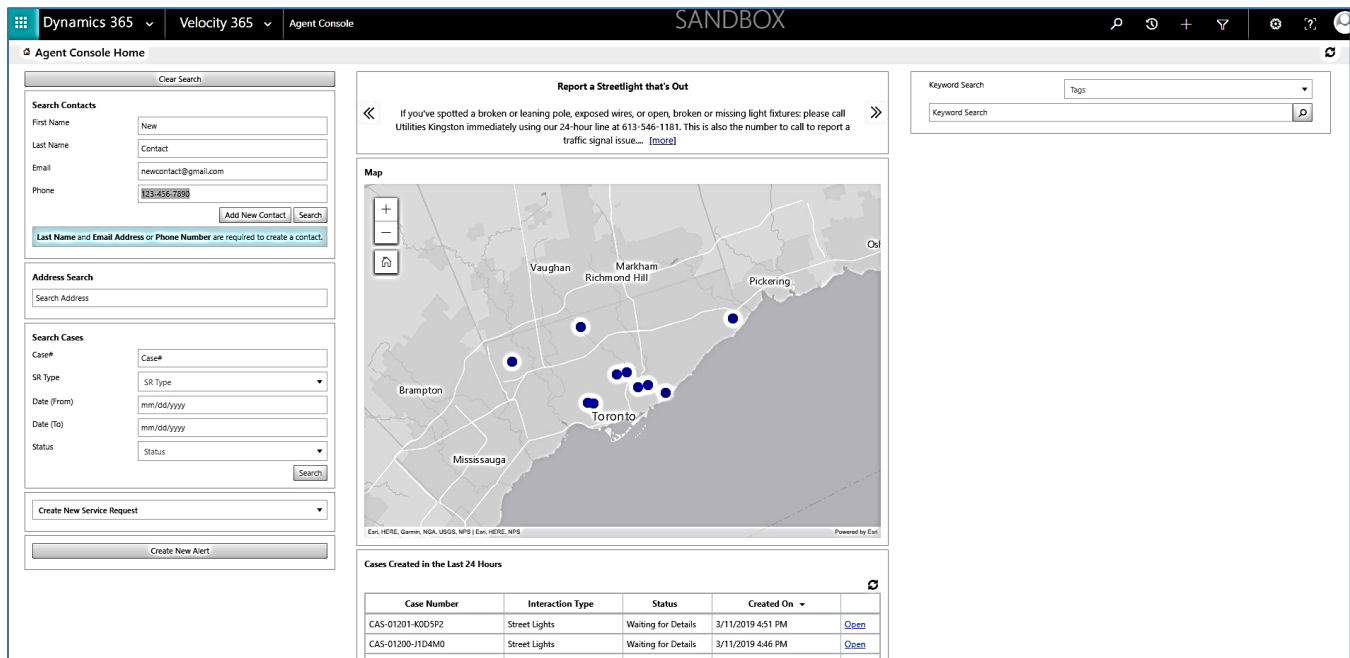
This contact summary record shows all the contact information as well as any posts, activities or notes related to the contact. It also shows the recent cases created either by the contact themselves on the portal, or on behalf of the contact when they called your office.

This provides a summary view of the most relevant information for the contact allowing you to quickly assist the citizen if they are calling about a previous inquiry or related service request.

## Creating a New Contact

If after searching for the contact as described above, there is no existing contact in the system, you will need to create a new contact. To create a new contact you enter the contact information in the contact details and click on **Add New Contact**.

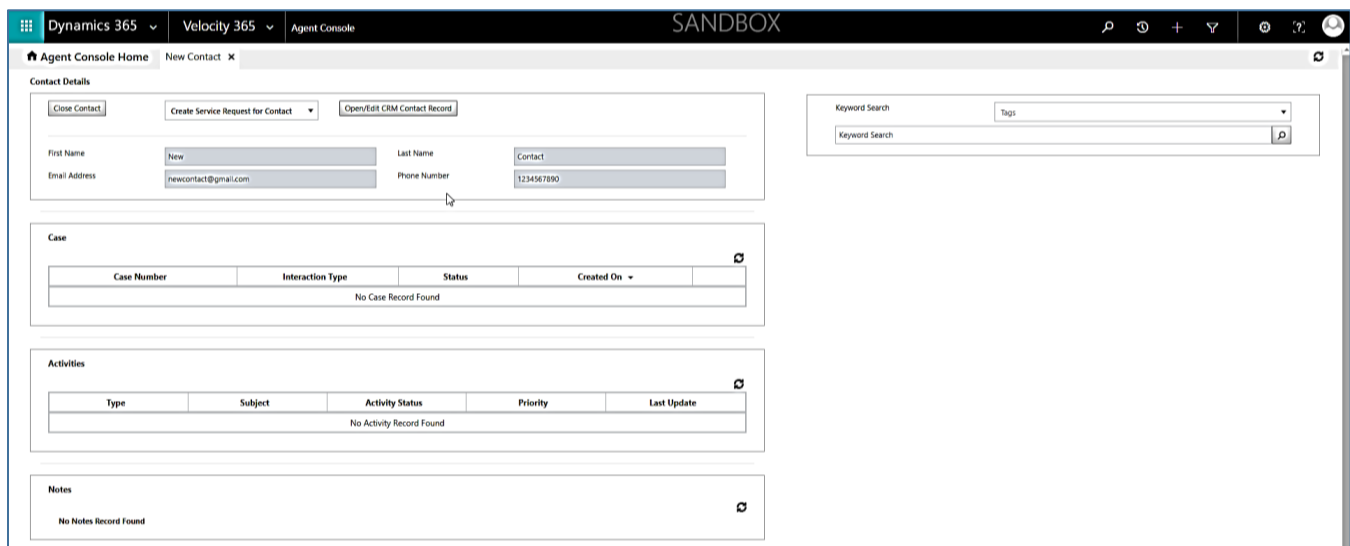
**TIP:** A minimum of last name AND email address OR phone number are required to create a new contact.



The screenshot shows the 'Agent Console Home' interface. On the left, there is a 'Search Contacts' form with fields for First Name, Last Name, Email, and Phone. Below this is an 'Address Search' field and a 'Search Cases' section with filters for Case#, SR Type, Date (From/To), and Status. A 'Create New Service Request' button is also present. The main area features a map of the Greater Toronto Area with several blue location pins. To the right of the map is a 'Report a Streetlight that's Out' section with a text input and a 'Report' button. Below the map is a table titled 'Cases Created in the Last 24 Hours'.

Case Number	Interaction Type	Status	Created On
CAS-01201-KDDSP2	Street Lights	Waiting for Details	3/11/2019 4:51 PM
CAS-01200-J1D4M0	Street Lights	Waiting for Details	3/11/2019 4:46 PM

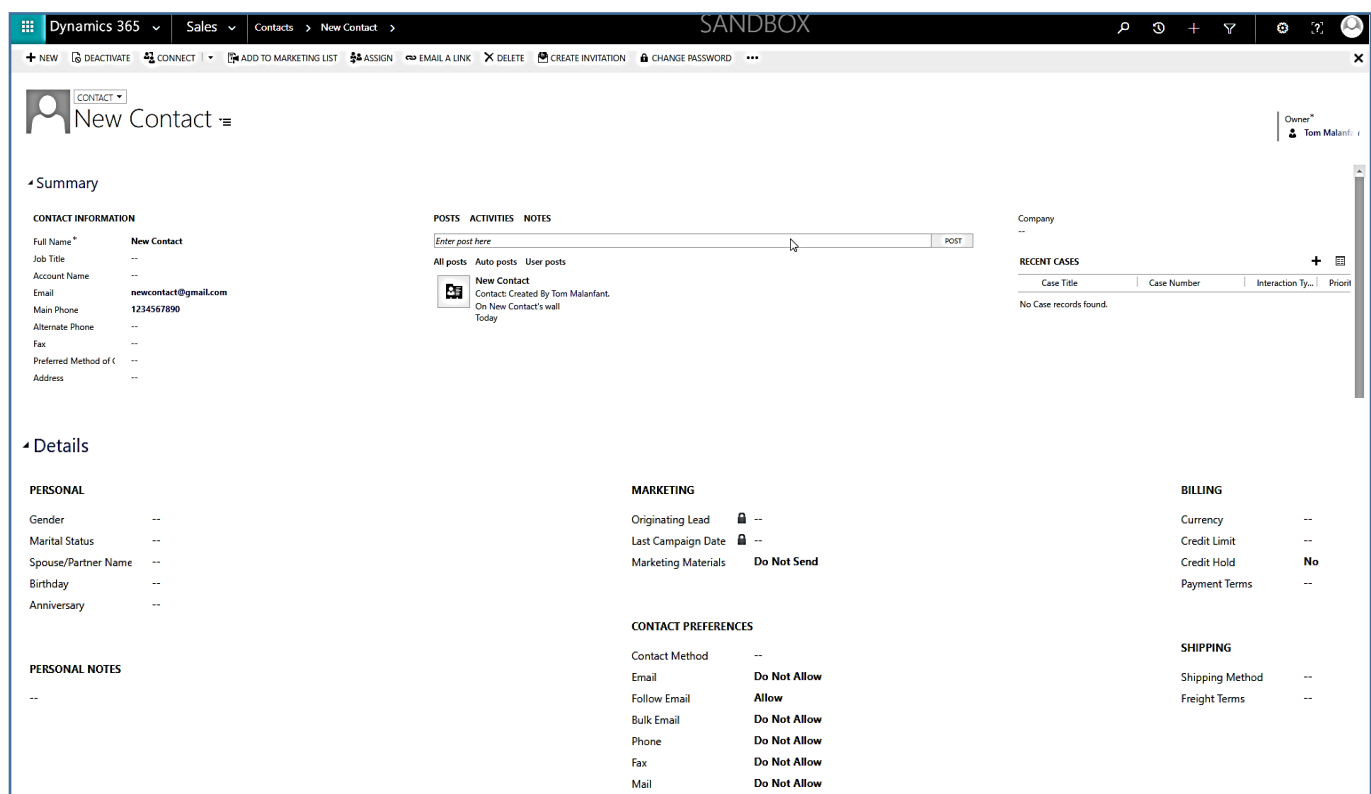
Once you have created the contact, the Contact Details screen is shown.



The screenshot shows the 'Contact Details' screen. At the top, there are buttons for 'Close Contact', 'Create Service Request for Contact', and 'Open/Edit CRM Contact Record'. Below these are input fields for First Name, Last Name, Email Address, and Phone Number. The 'Case' section shows a table with columns for Case Number, Interaction Type, Status, and Created On, with a message 'No Case Record Found'. The 'Activities' section shows a table with columns for Type, Subject, Activity Status, Priority, and Last Update, with a message 'No Activity Record Found'. The 'Notes' section shows a message 'No Notes Record Found'.

From here you can open the contact record in Dynamics 365 to add more details related to the contact. To do this, you click on **Open/Edit CRM Contact** Record and the contact record is displayed. This record shows who created the contact as well as any posts, activities or notes associated with the contact. Any recent cases associated with the contact are also displayed as well as other details such as personal information, marketing information as well as contact preferences. The detailed training on editing contact records is part of the Dynamics 365 for Customer Service training and not covered in this guide.

➡ **TIP:** All settings related to receiving correspondence have automatically been set to “Do Not Allow” to comply with the various privacy legislative requirement. If the contact requests to receive email these settings need to be changed to “Allow”.



**Dynamics 365** | Sales | Contacts > New Contact

**CONTACT** New Contact

Owner: Tom Malenfant

**Summary**

**CONTACT INFORMATION**

Full Name *	New Contact
Job Title	--
Account Name	--
Email	newcontact@gmail.com
Main Phone	1234567890
Alternate Phone	--
Fax	--
Preferred Method of C	--
Address	--

**POSTS** **ACTIVITIES** **NOTES**

Enter post here [POST]

All posts Auto posts User posts

**New Contact**  
Contact Created By Tom Malenfant.  
On New Contact's wall  
Today

**RECENT CASES**

Case Title	Case Number	Interaction Ty...	Priorit
No Case records found.			

**Details**

**PERSONAL**

Gender	--
Marital Status	--
Spouse/Partner Name	--
Birthday	--
Anniversary	--

**PERSONAL NOTES**

--

**MARKETING**

Originating Lead	--
Last Campaign Date	--
Marketing Materials	Do Not Send

**CONTACT PREFERENCES**

Contact Method	--
Email	Do Not Allow
Follow Email	Allow
Bulk Email	Do Not Allow
Phone	Do Not Allow
Fax	Do Not Allow
Mail	Do Not Allow

**BILLING**

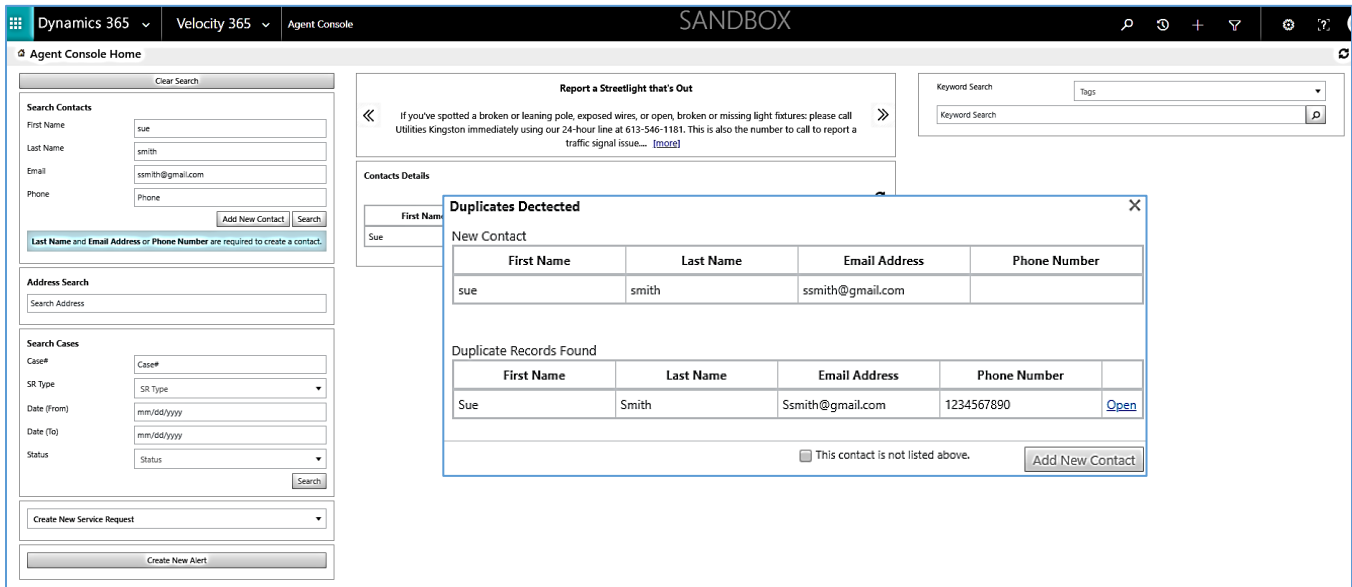
Currency	--
Credit Limit	--
Credit Hold	No
Payment Terms	--

**SHIPPING**

Shipping Method	--
Freight Terms	--

## Duplicate Contacts

If you are trying to add a new contact and there is already an existing contact, you will receive a pop-up message indicating that a duplicate contact has been detected. You can click on the **Open** link to open the contact in Dynamics to view its properties, or alternatively you can check the box “This contact is not listed above” to continue creating a new contact.



The screenshot shows the VelocityEngine Agent Console interface. A pop-up window titled "Duplicates Detected" is displayed, indicating a duplicate contact has been found. The window contains a table for "New Contact" and a table for "Duplicate Records Found".

**New Contact**

First Name	Last Name	Email Address	Phone Number
sue	smith	ssmith@gmail.com	

**Duplicate Records Found**

First Name	Last Name	Email Address	Phone Number	
Sue	Smith	Ssmith@gmail.com	1234567890	<a href="#">Open</a>

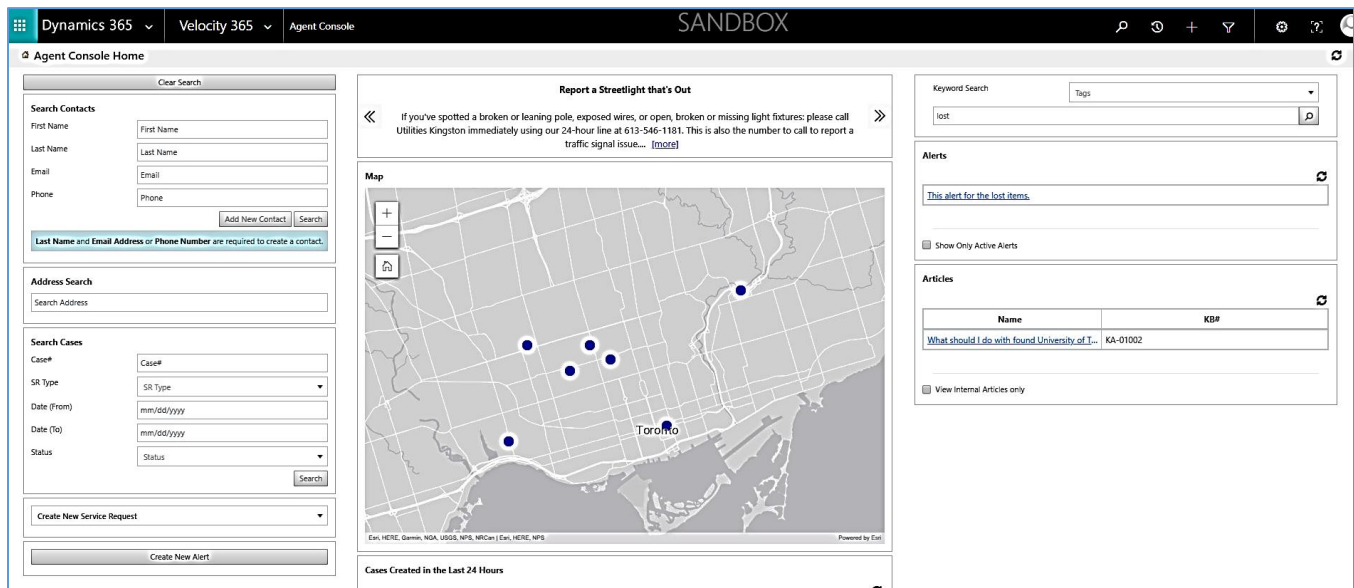
At the bottom of the pop-up, there is a checkbox labeled "This contact is not listed above." and an "Add New Contact" button.



# Using Alerts

## How to Search for an Alert

Alerts are like notifications which can be made available either internally or publicly. Internal alerts are viewable by staff while public alerts are available on the portal and viewable by everyone. Alerts can be associated with an address and are typically searched by subject content. To view an alert, enter the subject in the **Keyword Search** and press <enter>, or select a tag from the dropdown.



The screenshot shows the 'Agent Console Home' interface. On the left, there are search filters for 'Search Contacts' (First Name, Last Name, Email, Phone), 'Address Search' (Search Address), and 'Search Cases' (Case#, SR Type, Date (From), Date (To), Status). Below these are buttons for 'Create New Service Request' and 'Create New Alert'. The main area displays a map of Toronto with several blue dots indicating alert locations. Above the map is a text box titled 'Report a Streetlight that's Out' with instructions and a phone number. On the right, there is a 'Keyword Search' bar, a 'Tags' dropdown, and a list of 'Alerts' and 'Articles'. The 'Alerts' section shows a link 'This alert for the lost items.' and a checkbox 'Show Only Active Alerts'. The 'Articles' section shows a table with columns 'Name' and 'KB#', containing one entry: 'What should I do with found University of T...' with KB# 'KA-01002'. Below the articles is a checkbox 'View Internal Articles only'.

By clicking on the specific alert, the details are then shown in the Agent Console window. You can also filter the results to only show active alerts if desired by checking the box. If you click on the link associated with the alert, it will open the alert in Dynamics 365 and allow you to edit/update it based on your individual security roles.

## Creating an Alert from the Agent Console

Dynamics 365 ▾
Velocity 365 ▾
Agent Console
🔍 🔄 + 📄 ? ⚙️

🏠 Agent Console Home

**Search Contacts**

Clear Search

First Name	<input type="text"/>
Last Name	<input type="text"/>
Email	<input type="text"/>
Phone	<input type="text"/>

Add New Contact Search

Last Name and Email Address or Phone Number are required to create a contact.

**Address Search**

**Search Cases**

Case#	<input type="text"/>
SR Type	<input type="text"/>
Date (From)	<input type="text"/>
Date (To)	<input type="text"/>
Status	<input type="text"/>

Search

Create New Service Request ▾

Create New Alert

### Report a Streetlight that's Out

⬅ If you've spotted a broken or leaning pole, exposed wires, or open, broken or missing light fixtures: please call Utilities Kingston immediately using our 24-hour line at 613-546-1181. This is also the number to call to report a traffic signal issue... [More!](#) ➡

**Map**

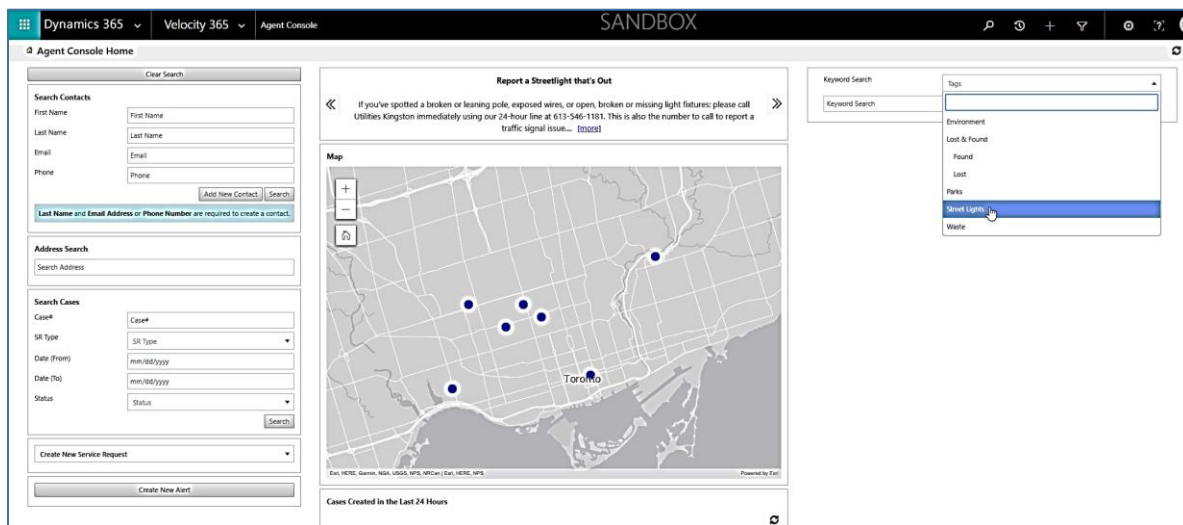
(Est. HERE, Garmin, NOAA, USGS, NPS, MetCar) Est. HERE, NPS  
Powered by Esri

Cases Created in the Last 24 Hours

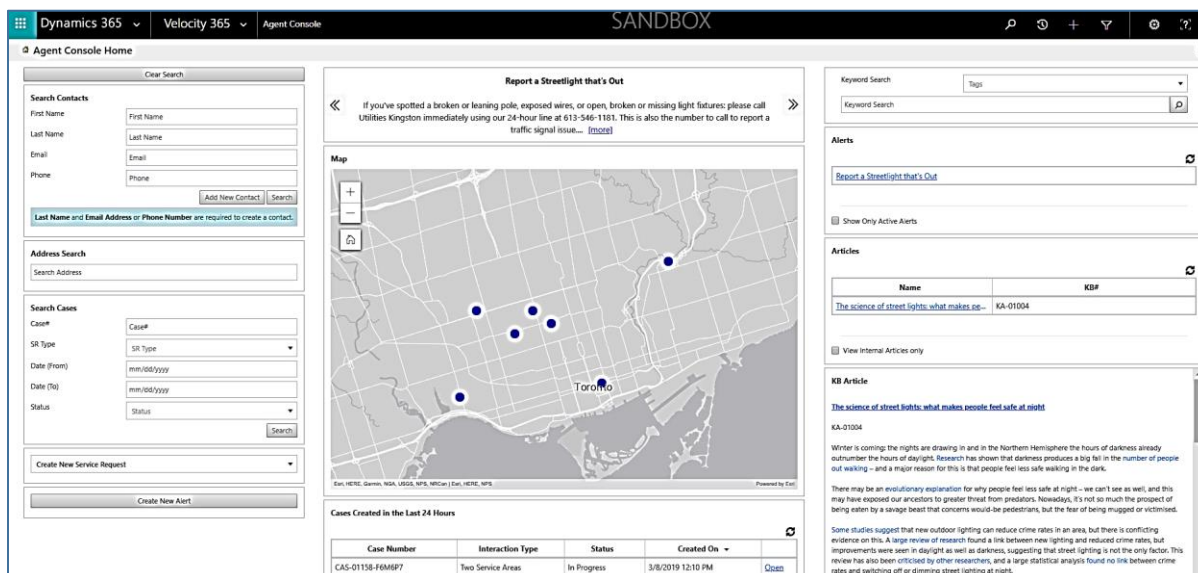
# Using the Knowledge Base

## Searching for a Knowledge Base Article

To search for a knowledge base article you can enter your keyword search and press <enter> or select a tag from the dropdown. You can search for a single word such as “tourist” or a phrase such as “Winter Control”.



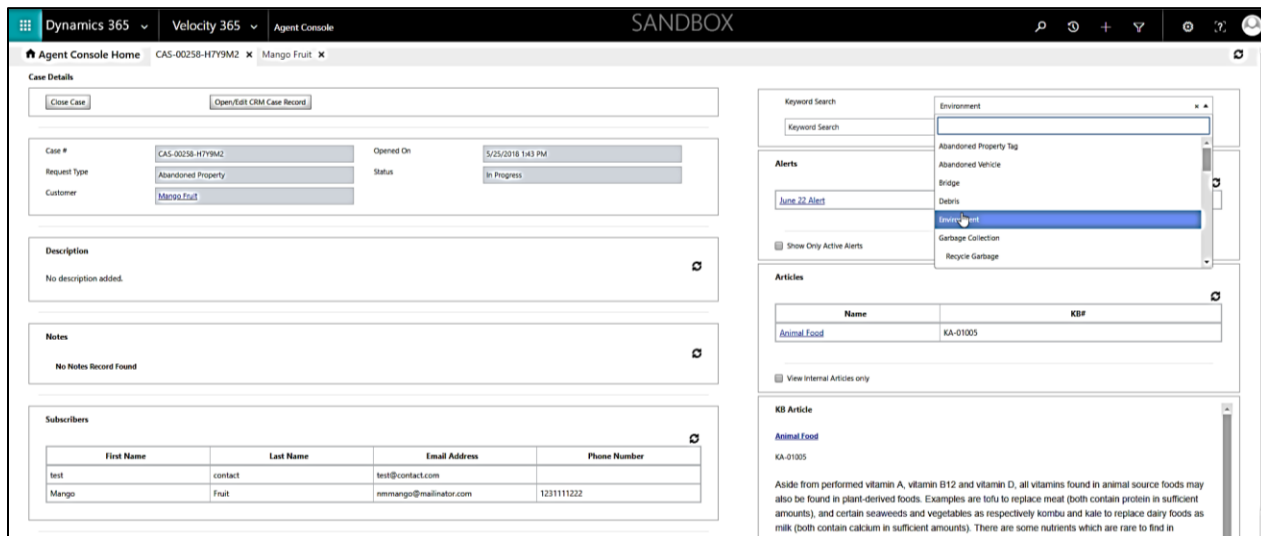
The resulting knowledge base article is then displayed in the Agent Console. You also have the option of displaying only internal articles by checking the appropriate dialogue box. If you click on the link associated with the knowledge base article, the article will open in Dynamics 365 and allow you to edit/update it based on your individual security roles.



## Searching a Knowledge Base Article from within Case Details Tab

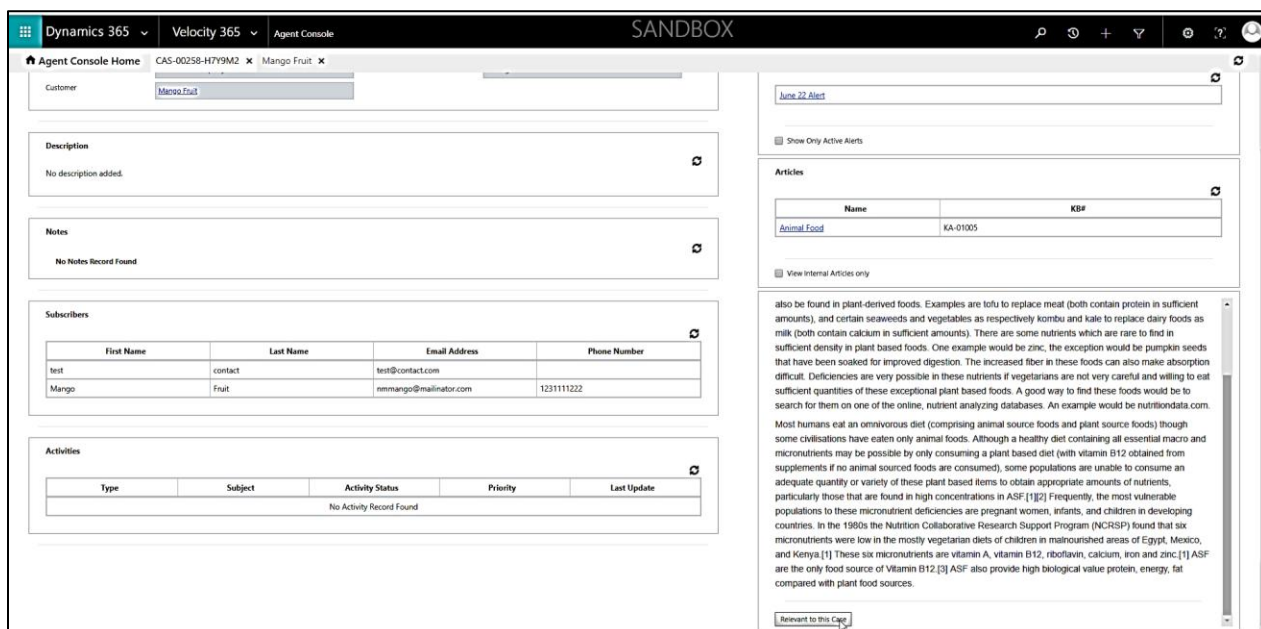
You can also search for a knowledge base article from within a case details tab, or a contact details tab. To search for a knowledge base article from within a case details tab, once you are on the case details tab, enter your keyword search and press <enter>, or select a tag from the drop down. The resulting knowledge base article is displayed. To associate the article to the displayed case, scroll to the bottom of the article and click on the box **Relevant to this Case** and the article will be logged to that case inside CRM. This same process applies to searching for a knowledge base article from within a contact case detail tab also.

This shows searching for the “Environment” tag in the drop down while on the selected case tab.



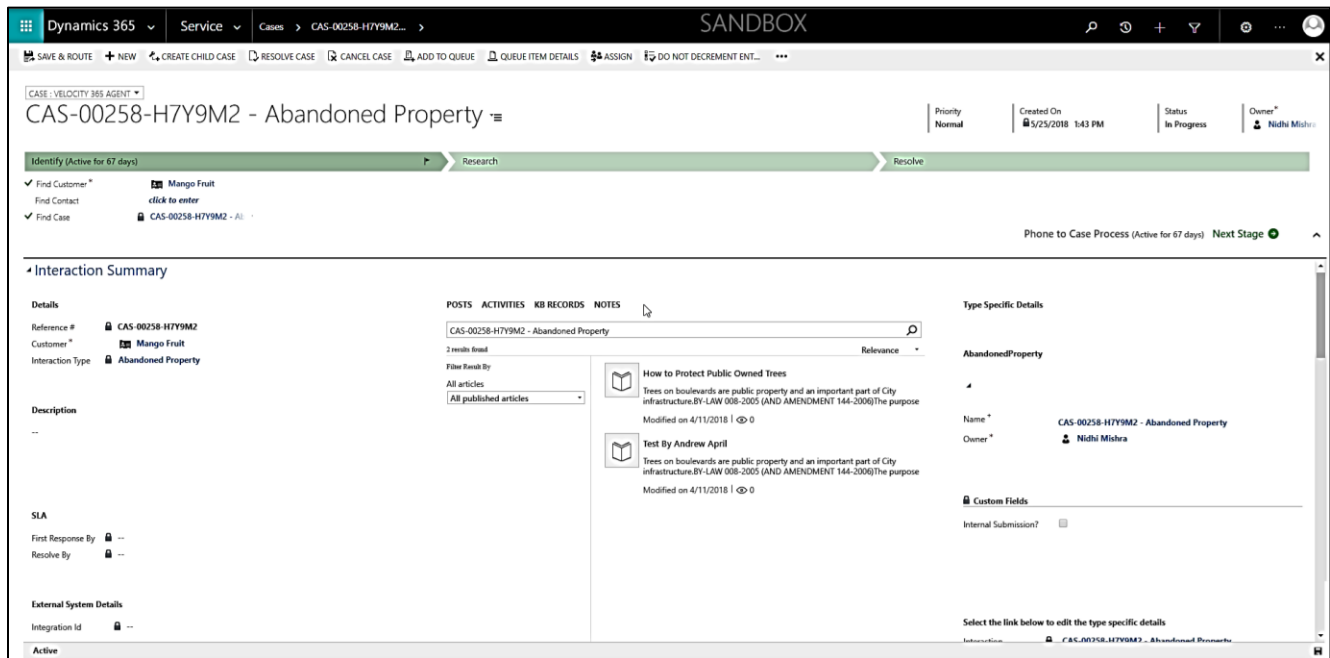
The screenshot shows the VelocityEngine Agent Console interface. The top navigation bar includes 'Dynamics 365', 'Velocity 365', and 'Agent Console'. The main header is 'SANDBOX'. The left sidebar shows 'Agent Console Home' and 'Case Details' for case 'CAS-00258-H7Y9M2' with customer 'Mango Fruit'. The 'Case Details' section includes fields for Case #, Request Type, Customer, Opened On, and Status. The 'Description' and 'Notes' sections are empty. The 'Subscribers' section shows a table with columns: First Name, Last Name, Email Address, and Phone Number. The 'Activities' section shows a table with columns: Type, Subject, Activity Status, Priority, and Last Update. The 'Keyword Search' section shows a search bar and a dropdown menu with 'Environment' selected. The 'Alerts' section shows a list of alerts, with 'June 22 Alert' selected. The 'Articles' section shows a list of articles, with 'Animal Food' (KA-01005) selected. The 'KB Article' section displays the content of the 'Animal Food' article, which discusses the benefits of animal source foods and the importance of a healthy diet.

When you scroll to the bottom of the article and click on the **Relevant to this case** link, the knowledge base article is added to the case.



The screenshot shows the VelocityEngine Agent Console interface. The top navigation bar includes 'Dynamics 365', 'Velocity 365', and 'Agent Console'. The main header is 'SANDBOX'. The left sidebar shows 'Agent Console Home' and 'Case Details' for case 'CAS-00258-H7Y9M2' with customer 'Mango Fruit'. The 'Case Details' section includes fields for Case #, Request Type, Customer, Opened On, and Status. The 'Description' and 'Notes' sections are empty. The 'Subscribers' section shows a table with columns: First Name, Last Name, Email Address, and Phone Number. The 'Activities' section shows a table with columns: Type, Subject, Activity Status, Priority, and Last Update. The 'Keyword Search' section shows a search bar and a dropdown menu with 'Environment' selected. The 'Alerts' section shows a list of alerts, with 'June 22 Alert' selected. The 'Articles' section shows a list of articles, with 'Animal Food' (KA-01005) selected. The 'KB Article' section displays the content of the 'Animal Food' article, which discusses the benefits of animal source foods and the importance of a healthy diet. At the bottom of the article, there is a link 'Relevant to this Case' which is highlighted by a mouse cursor.

If you click on the **Open/Edit CRM Case Record** link to open the case record inside CRM, then click on the KB Records link, you will see the record associated with the case as shown.



The screenshot displays the Dynamics 365 interface for a case record. The top navigation bar shows 'Dynamics 365' and 'Service'. The main header area includes the case ID 'CAS-00258-H7Y9M2 - Abandoned Property' and a progress bar with stages: 'Identify (Active for 67 days)', 'Research', and 'Resolve'. The 'Research' stage is currently active.

The left sidebar contains a list of actions: 'Find Customer', 'Find Contact', and 'Find Case'. The main content area is divided into several sections:

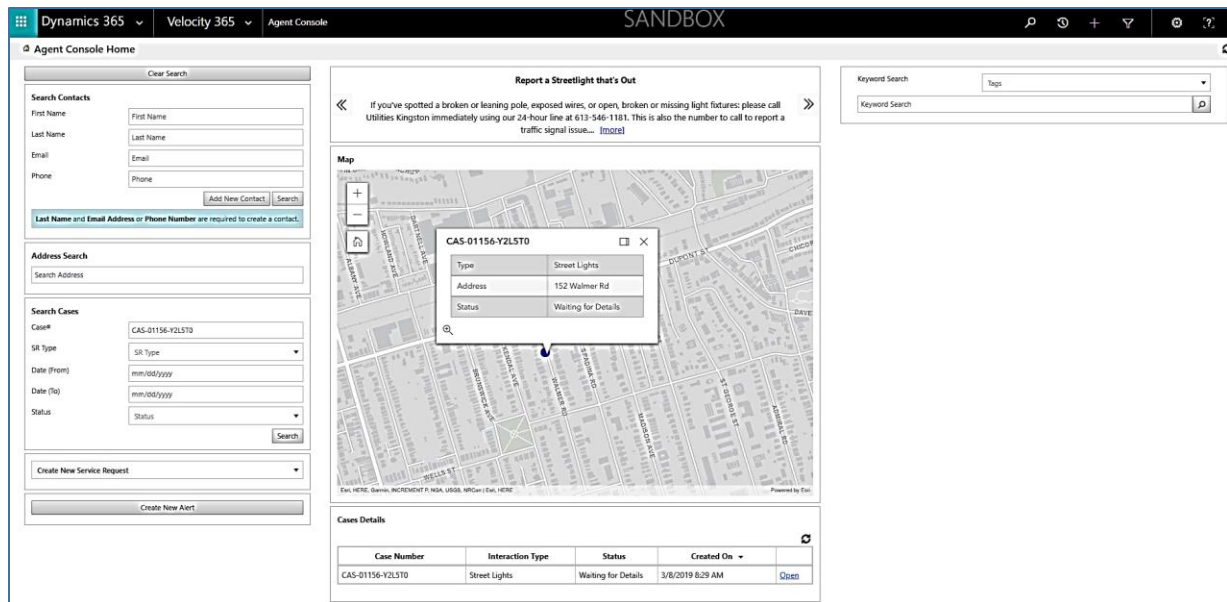
- Details:** Shows the case reference # 'CAS-00258-H7Y9M2', customer 'Mango Fruit', and interaction type 'Abandoned Property'.
- Description:** A section for describing the case.
- SLA:** Shows the first response and resolve by dates.
- External System Details:** Includes the integration ID.
- KB RECORDS:** The selected tab, showing a list of knowledge base articles. The first article is 'How to Protect Public Owned Trees', which is a published article.
- Type Specific Details:** A section for details specific to the 'AbandonedProperty' type, including fields for Name and Owner.

The bottom of the interface shows the case status as 'Active'.

# Service Requests

## Searching for a Service Request by Case Number

To search for an existing service request (case) by case number, enter the case number in the search field and press [Enter] or click **Search**. The case location is then centered on the map and the case number and status is displayed as shown.



**Report a Streetlight that's Out**

If you've spotted a broken or leaning pole, exposed wires, or open, broken or missing light fixtures, please call Utilities Kingston immediately using our 24-hour line at 613-546-1183. This is also the number to call to report a traffic signal issue... [\(more\)](#)

**Map**

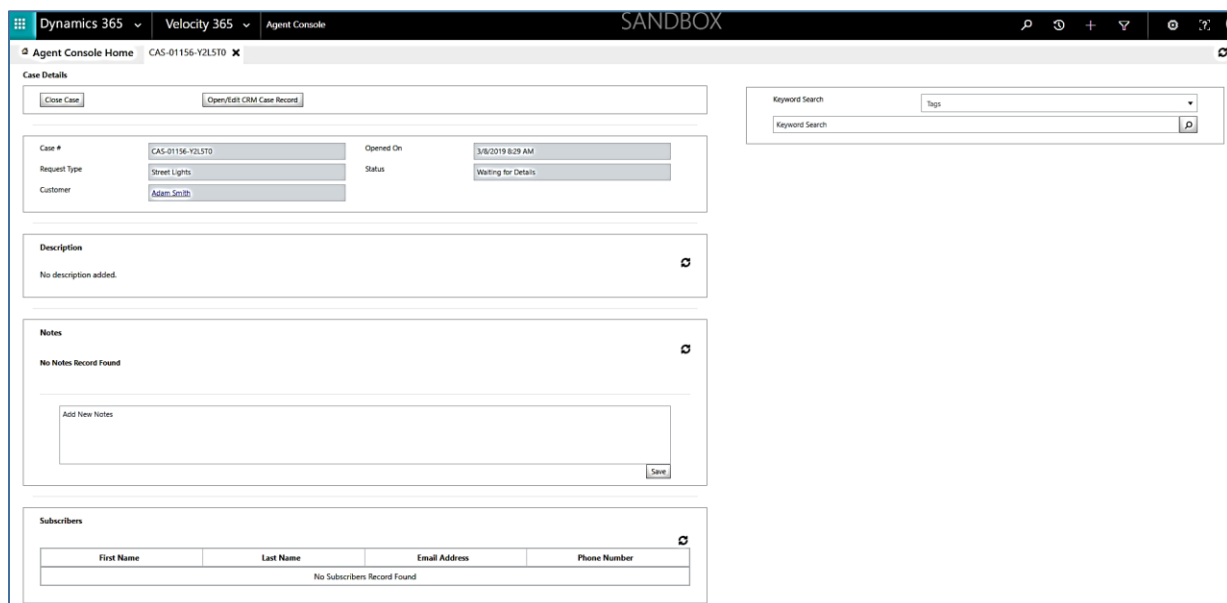
**CAS-01156-Y2LS10**

Type	Street Lights
Address	152 Walmer Rd
Status	Waiting for Details

**Cases Details**

Case Number	Interaction Type	Status	Created On
CAS-01156-Y2LS10	Street Lights	Waiting for Details	3/8/2019 8:29 AM

To open the case, click on **Open** and the Case Details screen is shown in the Agent Console screen.



**Case Details**

[Close Case](#) [Open/Edit CRM Case Record](#)

Case #  Opened On

Request Type  Status

Customer

**Description**

No description added.

**Notes**

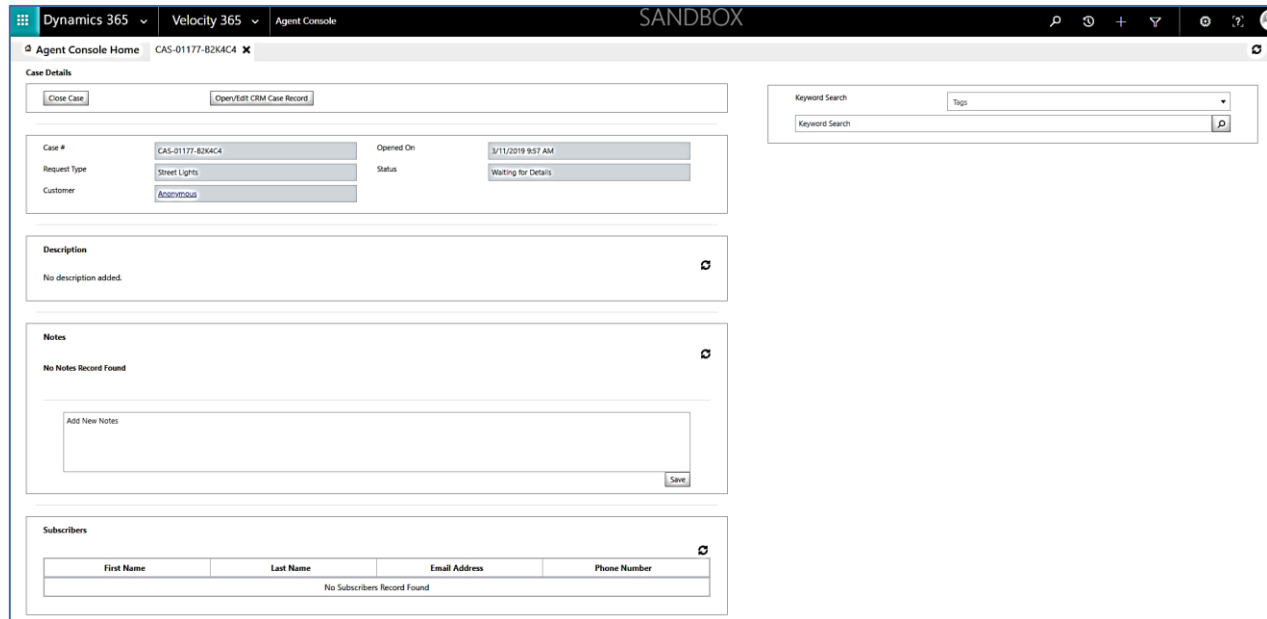
No Notes Record Found

Add New Notes

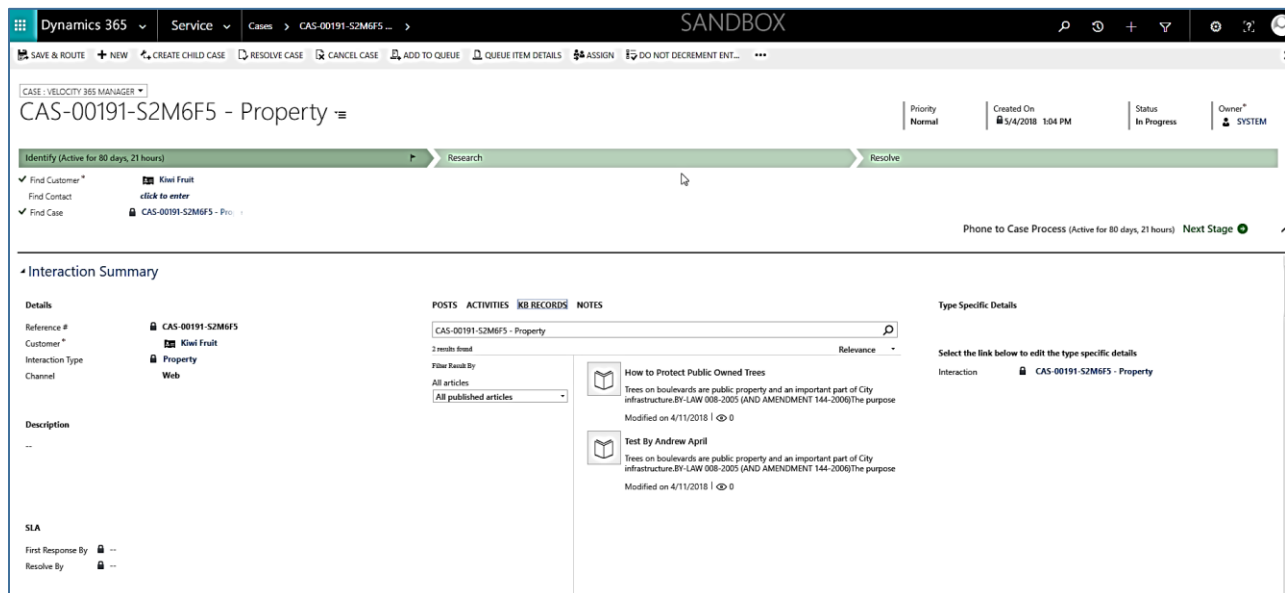
**Subscribers**

First Name	Last Name	Email Address	Phone Number
No Subscribers Record Found			

You can add/update notes related to this specific case, much the same way you can add/update notes related to a contact. To add or update notes from the Case Details page, enter the note and click on the “save” button. The notes are saved and information is added showing the name of the person who entered the notes, as well as the time and date they were entered. If the note is subsequently update, the updated time and date are also shown.



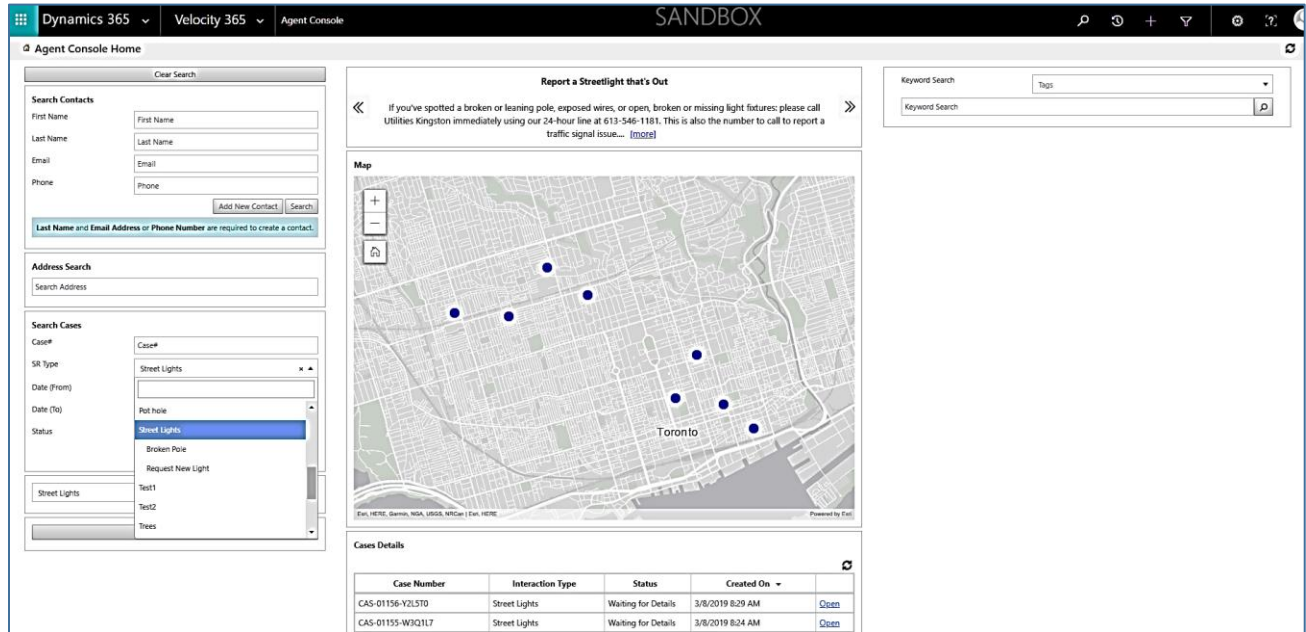
If you need to edit the case further in Dynamics 365, you can click on **Open/Edit CRM Case Record** and edit any of the properties associated with the case. The detailed training on editing case records is part of the Dynamics 365 for Customer Service training and not covered in this guide.





## Searching for a Service Request by Service Request Type

If you do not know the case number, you can also search for the case by SR type. To do this, select the SR Type from the drop down list and either press {Enter} or click on **Search**.

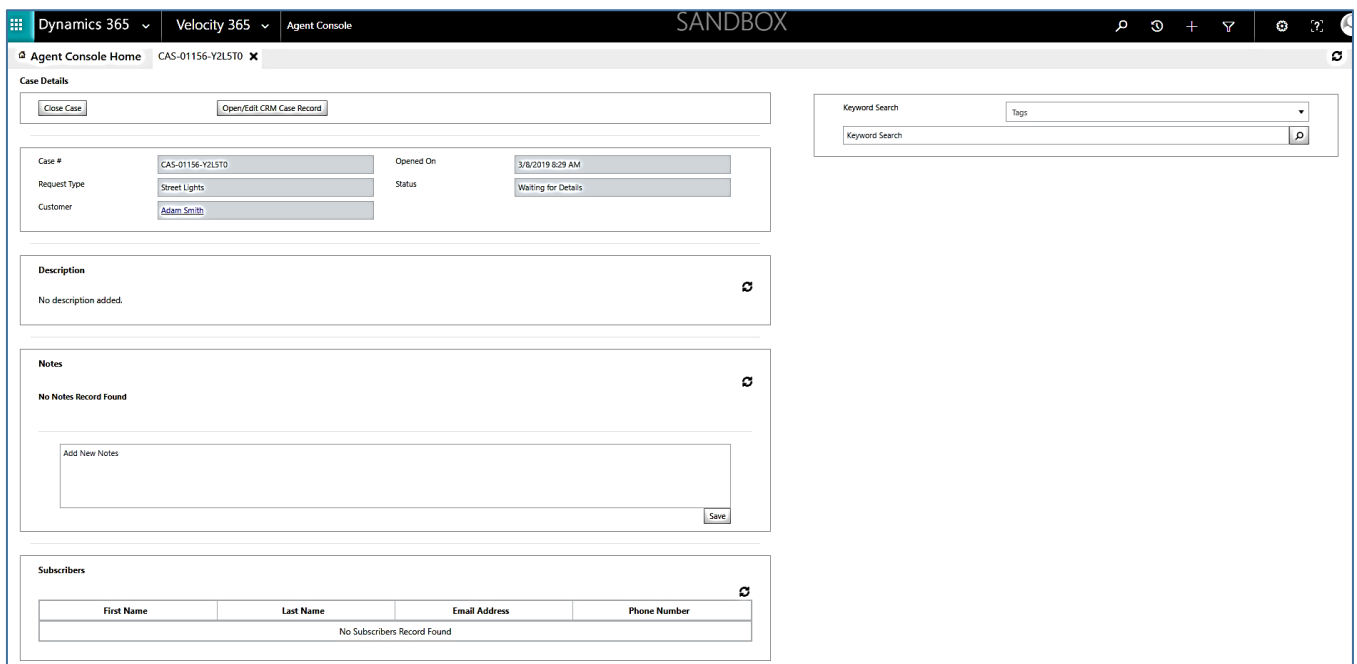


The screenshot shows the Agent Console interface with the following sections:

- Search Contacts:** Fields for First Name, Last Name, Email, and Phone. A search button is present.
- Address Search:** A field for Search Address.
- Search Cases:** A dropdown menu for SR Type, currently showing 'Street Lights'. Other options include 'Broken Pole', 'Request New Light', 'Test1', 'Test2', and 'Trees'.
- Map:** A map of Toronto showing several blue dots representing service requests.
- Cases Details:** A table listing cases.

Case Number	Interaction Type	Status	Created On	
CAS-01156-Y2L5T0	Street Lights	Waiting for Details	3/8/2019 8:29 AM	<a href="#">Open</a>
CAS-01155-W3Q3L7	Street Lights	Waiting for Details	3/8/2019 8:24 AM	<a href="#">Open</a>

The service requests for the selected type appear in the Agent Console screen and also on the map. You can view the case number, status and the date the case was created. If you need to view additional details about the case, you can click on the link to open the case in the Agent Console.



The screenshot shows the Agent Console interface with the following sections:

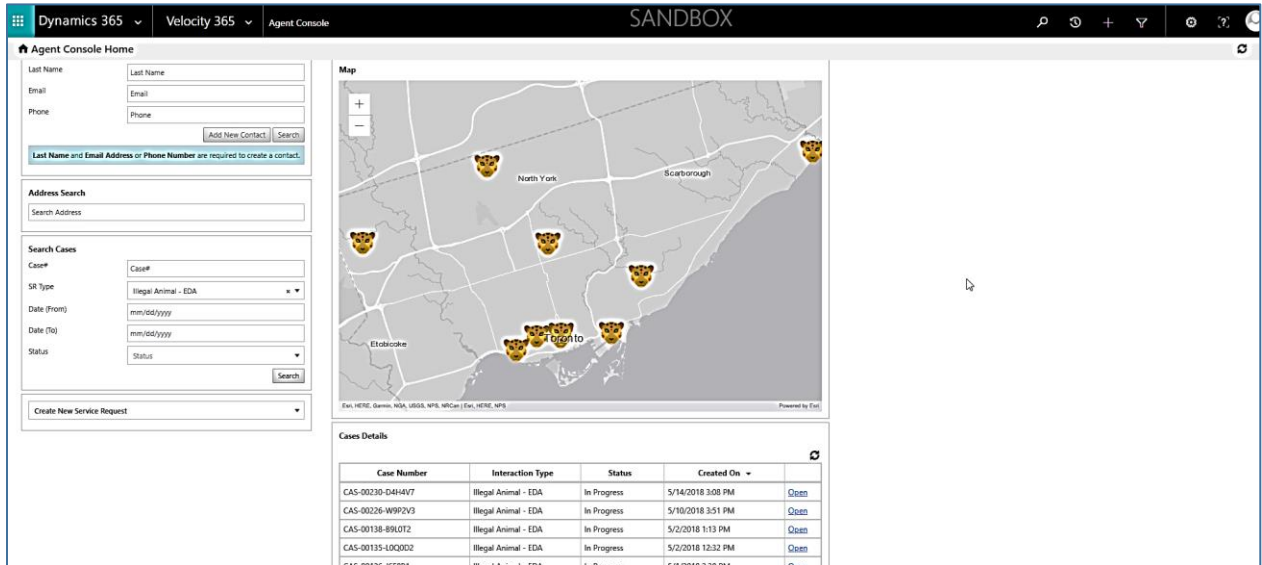
- Case Details:** Fields for Case #, Request Type, and Customer. A button to 'Open/Edit CRM Case Record' is present.
- Description:** A field for description.
- Notes:** A field for notes.
- Subscribers:** A table for subscribers.

Case #	Request Type	Customer	Opened On	Status
CAS-01156-Y2L5T0	Street Lights	Adam Smith	3/8/2019 8:29 AM	Waiting for Details

This view shows the description of the case, notes and activities as well as a list of any people who have subscribed to be notified about the case. If you need to edit the case in Dynamics 365, you can click on ***Open/Edit CRM Case Record*** and edit any of the properties associated with the case. The detailed training on editing case records is part of the Dynamics 365 for Customer Service training and not covered in this guide.

## Searching for a Service Request using the Map

You can also view the cases by type on a map and quickly identify the specific case you are interested in. To do this, you identify your search criteria in the search cases area and click on **Search**. The resulting screen shows all the cases matching your criteria.



**Agent Console Home**

Last Name:  Last Name:   
 Email:  Email:   
 Phone:  Phone:   
 Add New Contact Search  
 Last Name and Email Address or Phone Number are required to create a contact.

**Address Search**

Search Address:

**Search Cases**

Case#:   
 SR Type: Illegal Animal - EDA  
 Date (From): mm/dd/yyyy  
 Date (To): mm/dd/yyyy  
 Status:   
 Search

Create New Service Request

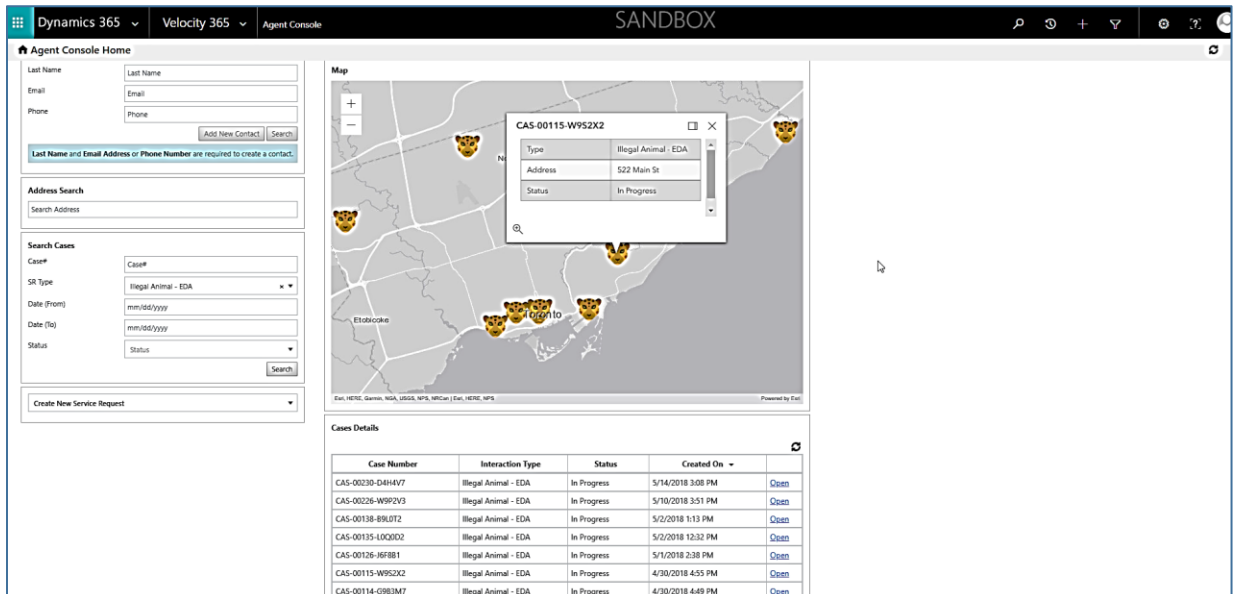
**Map**

Map showing locations of cases in Toronto. Markers are placed on the map for each case.

**Cases Details**

Case Number	Interaction Type	Status	Created On	
CAS-00230-D4H4V7	Illegal Animal - EDA	In Progress	5/14/2018 3:08 PM	Open
CAS-00226-W9P2V3	Illegal Animal - EDA	In Progress	5/10/2018 3:51 PM	Open
CAS-00138-B9L0T2	Illegal Animal - EDA	In Progress	5/2/2018 1:13 PM	Open
CAS-00135-L0Q0D2	Illegal Animal - EDA	In Progress	5/2/2018 12:32 PM	Open
CAS-00136-B6F8B1	Illegal Animal - EDA	In Progress	5/2/2018 3:38 PM	Open

From here you can zoom in and out or see the specific details regarding any of the cases shown on the map by clicking on the specific case. A dialogue box appears showing the location, status and SR type. You can also click on the magnifying glass to center the map on that case.



**Agent Console Home**

Last Name:  Last Name:   
 Email:  Email:   
 Phone:  Phone:   
 Add New Contact Search  
 Last Name and Email Address or Phone Number are required to create a contact.

**Address Search**

Search Address:

**Search Cases**

Case#:   
 SR Type: Illegal Animal - EDA  
 Date (From): mm/dd/yyyy  
 Date (To): mm/dd/yyyy  
 Status:   
 Search

Create New Service Request

**Map**

Map showing locations of cases in Toronto. Markers are placed on the map for each case.

**CAS-00115-W9S2X2**

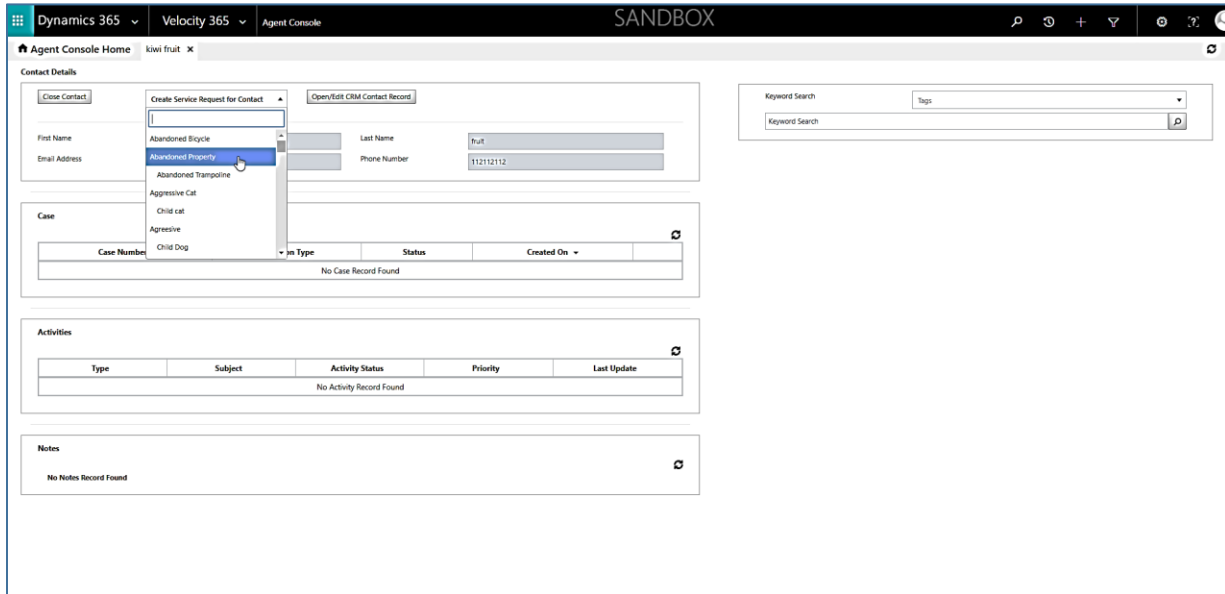
Type: Illegal Animal - EDA  
 Address: 522 Main St  
 Status: In Progress

**Cases Details**

Case Number	Interaction Type	Status	Created On	
CAS-00230-D4H4V7	Illegal Animal - EDA	In Progress	5/14/2018 3:08 PM	Open
CAS-00226-W9P2V3	Illegal Animal - EDA	In Progress	5/10/2018 3:51 PM	Open
CAS-00138-B9L0T2	Illegal Animal - EDA	In Progress	5/2/2018 1:13 PM	Open
CAS-00135-L0Q0D2	Illegal Animal - EDA	In Progress	5/2/2018 12:32 PM	Open
CAS-00136-B6F8B1	Illegal Animal - EDA	In Progress	5/2/2018 3:38 PM	Open
CAS-00115-W9S2X2	Illegal Animal - EDA	In Progress	4/30/2018 4:55 PM	Open
CAS-00114-G9B3M7	Illegal Animal - EDA	In Progress	4/30/2018 4:49 PM	Open

## Creating a new Service Request from a Contact Record

To create a new service request for a citizen, once you have the contact record displayed on the Agent Console screen as shown, click on the drop down list **Create Service Request for Contact** and select the required service request type.

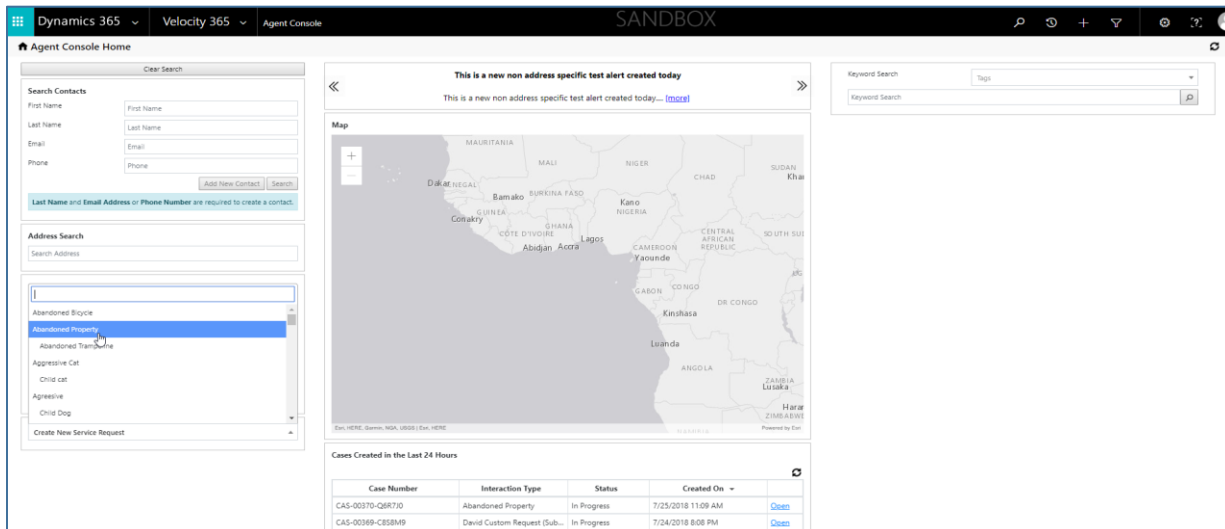


The screenshot shows the 'Agent Console' interface for 'kiwi fruit'. The 'Contact Details' section includes fields for First Name, Last Name, Email Address, and Phone Number. A dropdown menu 'Create Service Request for Contact' is open, showing options: Abandoned Bicycle, Abandoned Property, Abandoned Trampoline, Aggressive Cat, Child cat, Aggressive, and Child Dog. Below this is a table for 'Case' records, which is currently empty with the message 'No Case Record Found'. There are also sections for 'Activities' and 'Notes', both showing 'No Activity Record Found' and 'No Notes Record Found' respectively.

The Dynamics 365 service request screen is displayed and you can complete any additional information such as description and also enter the required location details. Once all the information is created, you click on the save icon in the bottom right to save the record.

## Creating a new Service Request from the Agent Console

You can also create a new service request right from the Agent Console home screen by clicking on the drop down in the **Create New Service Request** link and selecting the service request type.



The screenshot shows the 'Agent Console Home' screen. On the left, there are search filters for 'Search Contacts' (First Name, Last Name, Email, Phone) and 'Address Search' (Search Address). A dropdown menu 'Create New Service Request' is open, showing the same options as the previous screenshot. The main area displays a map of West Africa with a message: 'This is a new non address specific test alert created today...'. Below the map is a table 'Cases Created in the Last 24 Hours' with columns: Case Number, Interaction Type, Status, Created On, and a 'Clean' button.

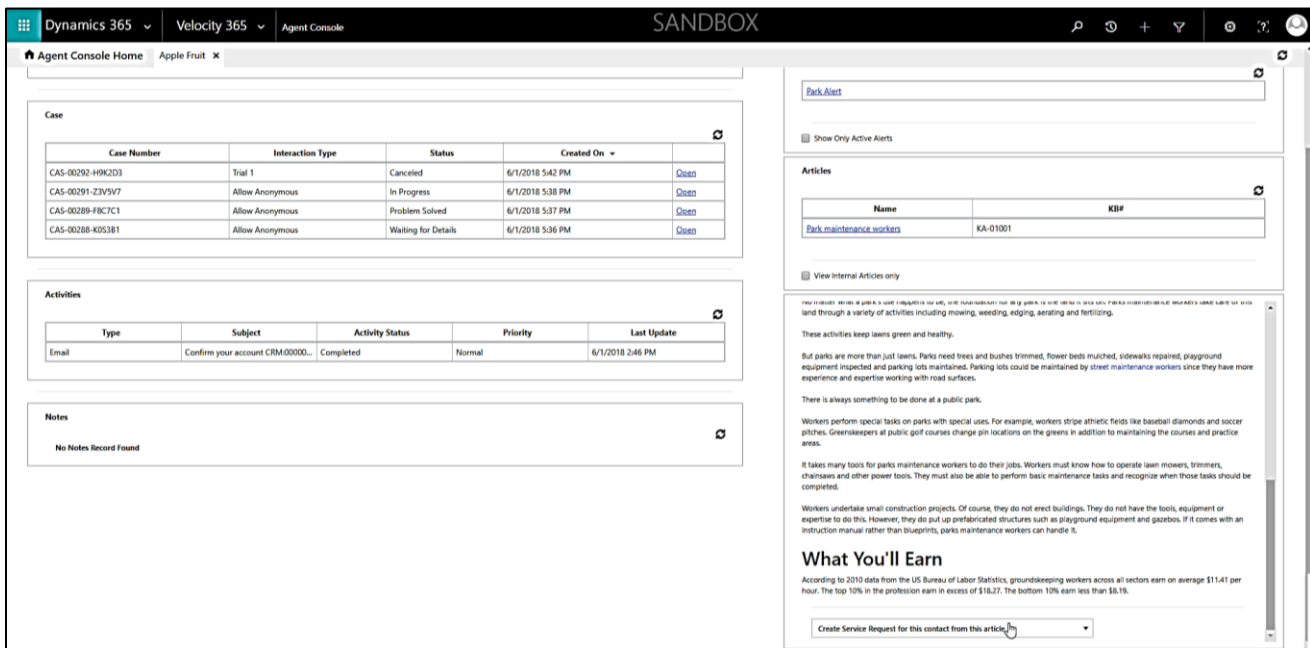
Case Number	Interaction Type	Status	Created On	Clean
CAS-00370-Q6R7D	Abandoned Property	In Progress	7/25/2018 11:08 AM	Clean
CAS-00369-C83BM9	David Custom Request (Sub...	In Progress	7/24/2018 8:08 PM	Clean

A Dynamics 365 form is opened and you can enter all the contact and location details.

Tip: To subscribe a citizen (other than the contact associated with a service request) to a specific service request, you must first create the service request. Once the service request is created, you can either open it to add the subscriber, or you can open the contact and subscribe them to the specific service request.

## Creating a Service Request for a Contact from within a Knowledge Base Article

While you are working with a specific contact, if you have a knowledge base article displayed, you can also create a service request for the contact, directly from the knowledge base article. To do this, once the knowledge base article is displayed, scroll to the bottom of the article and click on the link **Create Service Request for this Contact from this article**. Select the appropriate case type from the drop down list to create the case.

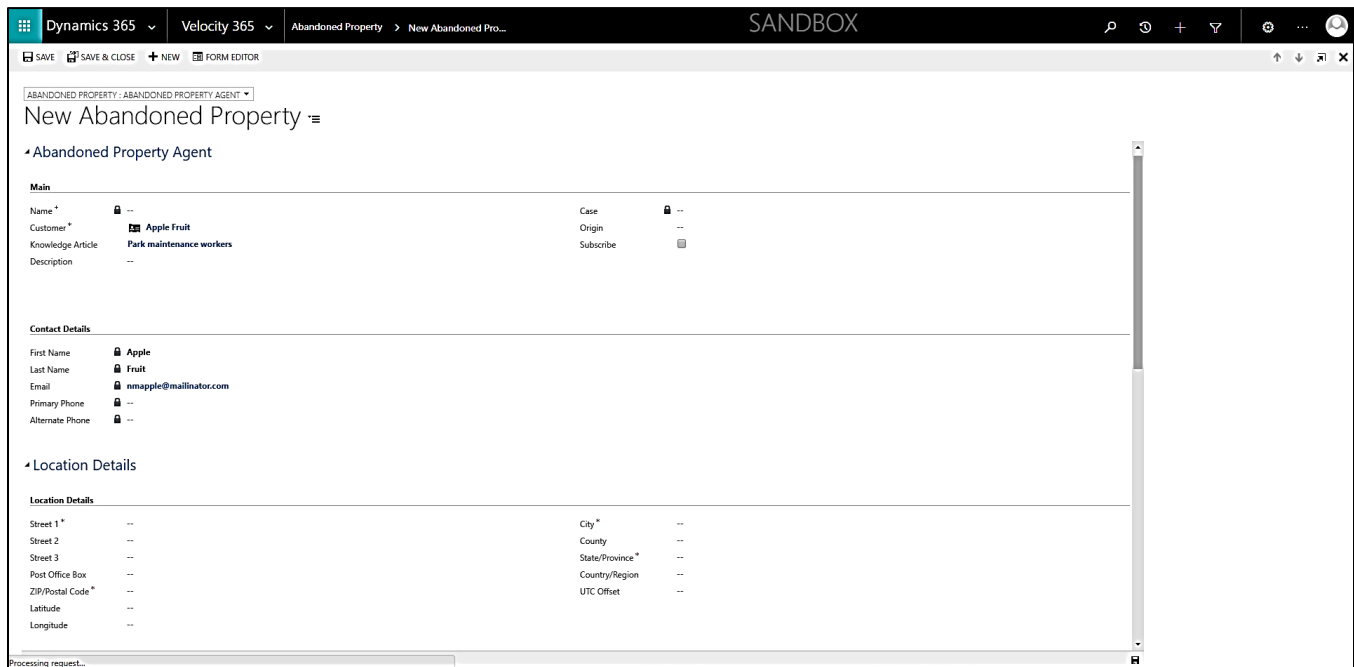


The screenshot shows the Dynamics 365 Agent Console interface. The top navigation bar includes 'Dynamics 365', 'Velocity 365', and 'Agent Console'. The main content area is divided into several sections:

- Case**: A table listing cases with columns for Case Number, Interaction Type, Status, Created On, and a link to 'Open'.
- Activities**: A table listing activities with columns for Type, Subject, Activity Status, Priority, and Last Update.
- Notes**: A section for notes, currently showing 'No Notes Record Found'.
- Articles**: A section for knowledge base articles, showing a table with Name and KB#.

The 'Articles' section displays a knowledge base article titled 'Park Alert' (KB# KA-01001). The article content includes information about park maintenance activities and a section titled 'What You'll Earn'. At the bottom of the article, there is a button labeled 'Create Service Request for this contact from this article'.

The new case record is displayed with the Contact information pre-populated and the knowledge base article already linked to the case as shown.

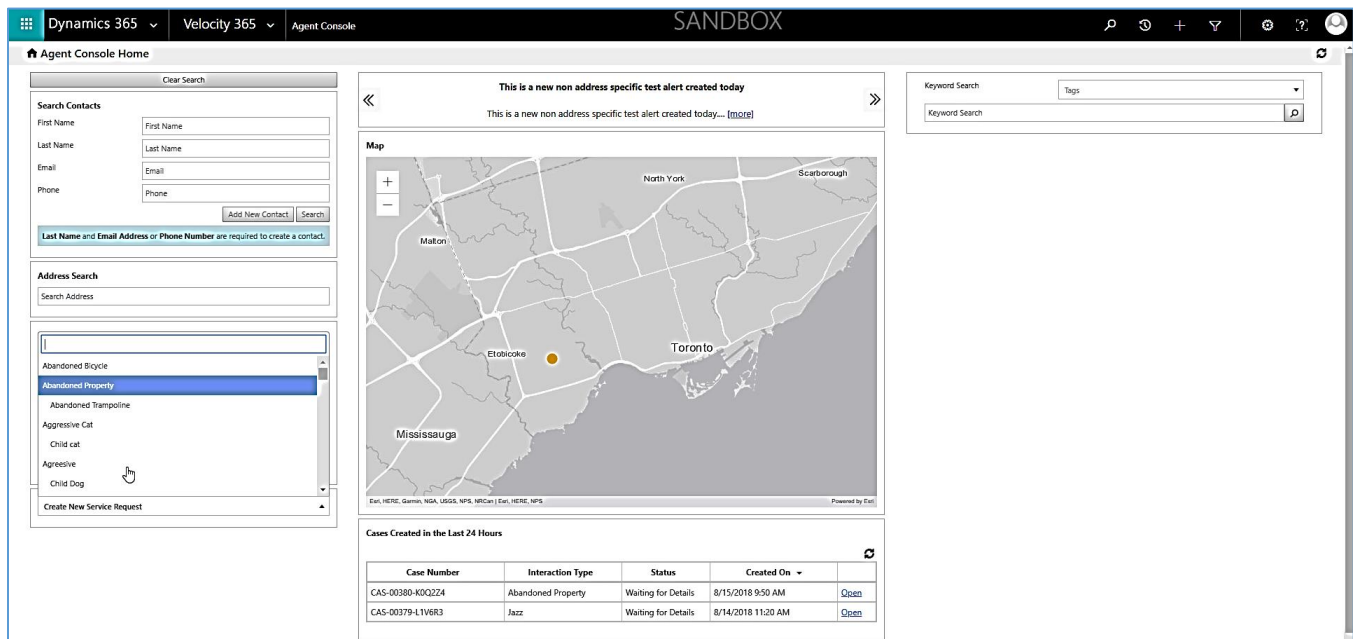


Once you complete the remaining location details for the specific service request, you can save the record.

➡ Tip: You can manually fill in the location of the issue, or alternatively use the map to identify the specific location, polygon or intersection.

## Creating a Service Request from the Map

To create a Service Request from the map you select the appropriate service request type on the Agent Console Screen as shown.



Agent Console Home

Search Contacts

First Name:

Last Name:

Email:

Phone:

Last Name and Email Address or Phone Number are required to create a contact.

Address Search

Search Address:

Abandoned Bicycle

Abandoned Property

Abandoned Trampoline

Aggressive Cat

Child cat

Aggressive

Child Dog

This is a new non address specific test alert created today

This is a new non address specific test alert created today... [\[more\]](#)

Map

North York

Scarborough

Mississauga

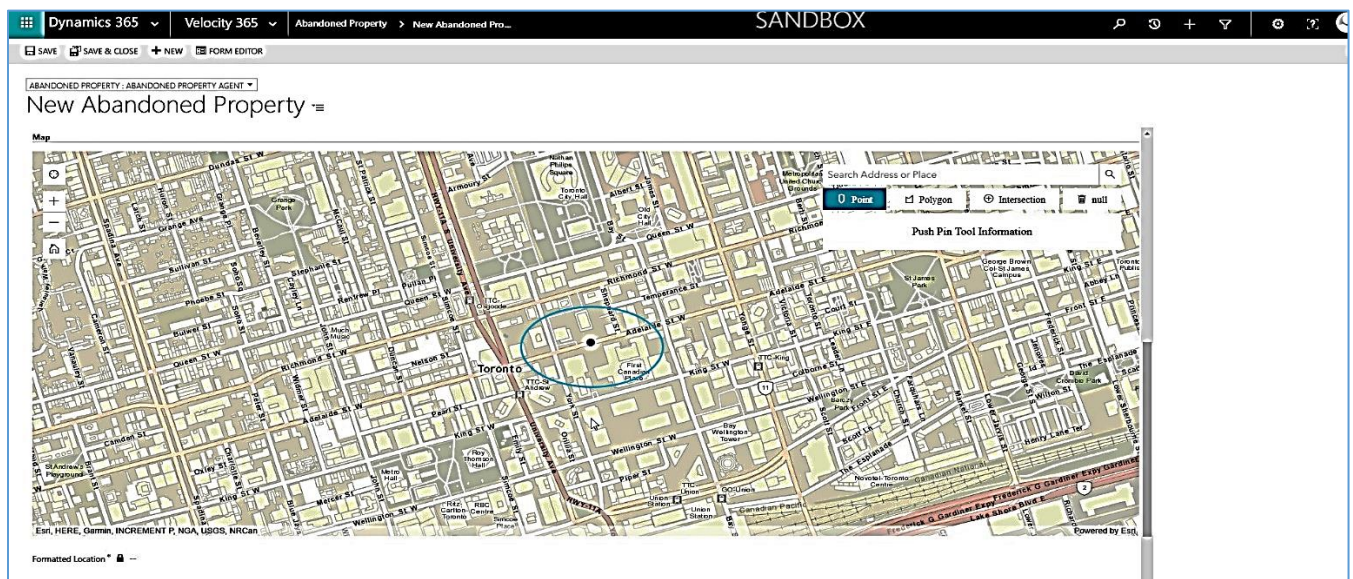
Toronto

Map data © 2018 HERE, Garmin, NGA, USGS, NPS, NRCAN | Map data © 2018 HERE, NPS

Cases Created in the Last 24 Hours

Case Number	Interaction Type	Status	Created On	
CAS-00380-K0Q224	Abandoned Property	Waiting for Details	8/15/2018 9:50 AM	<a href="#">Open</a>
CAS-00379-L1V6R3	Jazz	Waiting for Details	8/14/2018 11:20 AM	<a href="#">Open</a>

Once you select the desired service request type, the new service request form is presented. Scroll down to the map area and you can select either a point, polygon, or intersection to identify the location of the service request on the map. The screen shot below demonstrates the use of a single point to identify the location.



ABANDONED PROPERTY: ABANDONED PROPERTY AGENT

New Abandoned Property

Map

Search Address or Place:

Push Pin Tool Information

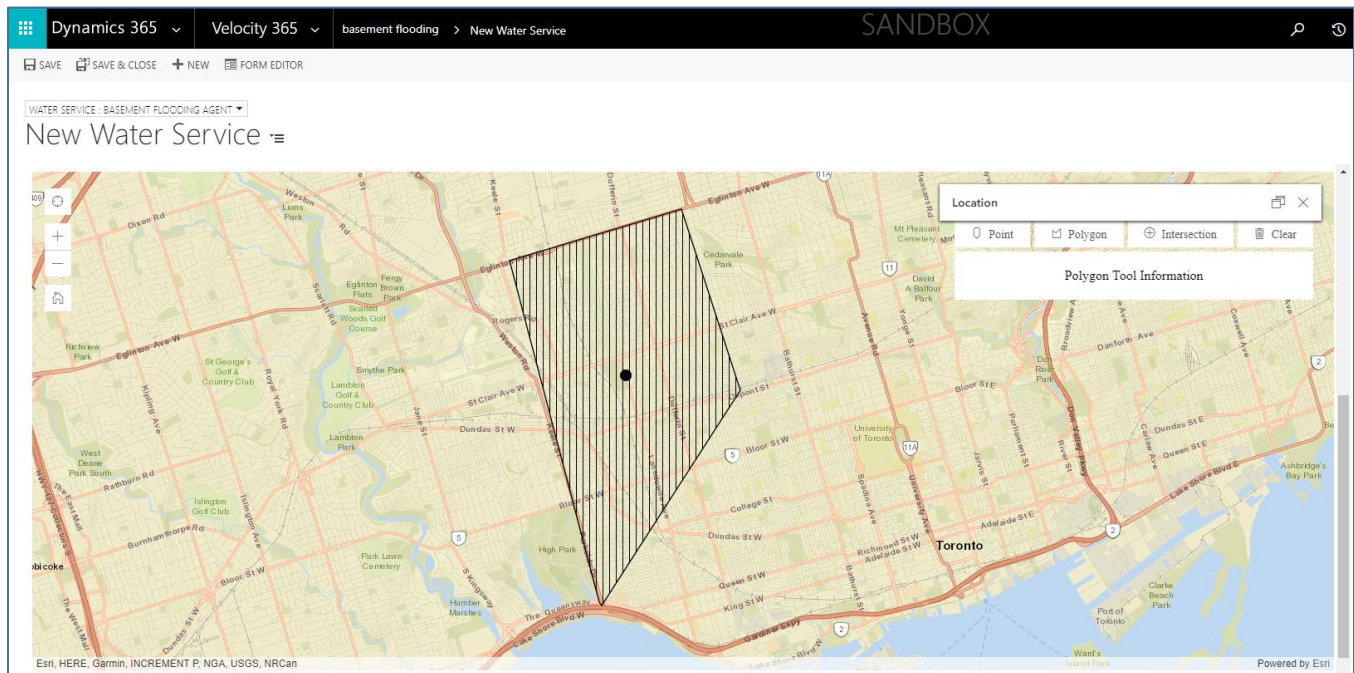
Formatted Location:

Map data © 2018 HERE, Garmin, INCREMENT P, NGA, USGS, NRCAN

Once you drop the pin on the desired location, the screen refreshes to show the actual address in the location details section. You can now fill in the remaining information (contact, etc) and save the service request.



Using a point or an intersection will be the most frequently used means for identifying the location. If you were trying to identify a specific region for a specific interaction type such as basement flooding or to select a region affected by a weather event, you would typically use a polygon to identify the area in question.

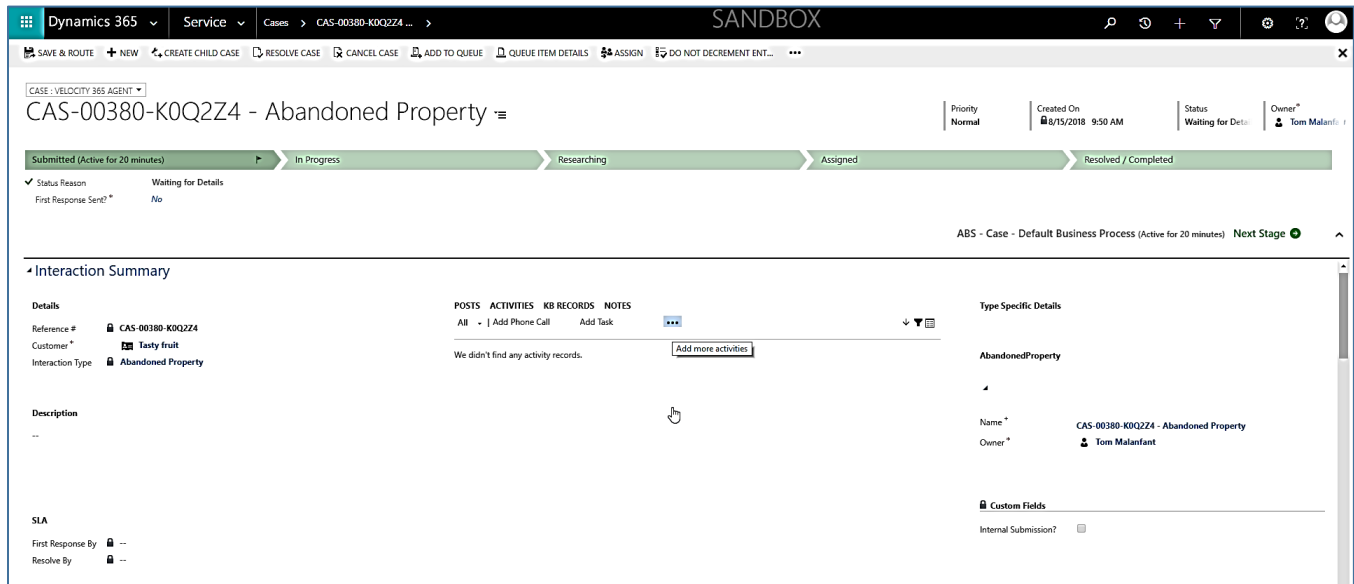


## Updating the location on a Service Request

To update the location on an existing service request, you search for the service request, then open it in Microsoft Dynamics CRM. From here you can either type in the new location, or click on the map and move the point/intersection/polygon to identify the new location. Once you have updated the location information, you can save the service request and the information is updated.

## Adding Activities to an existing Service Request

To add an activity to an existing service request, you open the specific service request in Microsoft Dynamics CRM and click on the **Activities** tab in the center pane. From there you can add a phone call, email, or task.



**Dynamics 365** | Service | Cases > CAS-00380-K0Q2Z4 ... | **SANDBOX**

SAVE & ROUTE | NEW | CREATE CHILD CASE | RESOLVE CASE | CANCEL CASE | ADD TO QUEUE | QUEUE ITEM DETAILS | ASSIGN | DO NOT DECREMENT ENT... |

CASE: VELOCITY 365 AGENT

**CAS-00380-K0Q2Z4 - Abandoned Property**

Priority: Normal | Created On: 8/15/2018 9:50 AM | Status: Waiting for Details | Owner: Tom Malenfant

Submitted (Active for 20 minutes) | In Progress | Researching | Assigned | Resolved / Completed

✓ Status Reason: First Response Set? \* | Waiting for Details: No

ABS - Case - Default Business Process (Active for 20 minutes) | Next Stage

**Interaction Summary**

**Details**

Reference #: CAS-00380-K0Q2Z4  
Customer: Tasty fruit  
Interaction Type: Abandoned Property

**DESCRIPTION**

--

**SLA**

First Response By: --  
Resolve By: --

**POSTS | ACTIVITIES | KB RECORDS | NOTES**

All | Add Phone Call | Add Task | **...**

We didn't find any activity records. [Add more activities](#)

**Type Specific Details**

**AbandonedProperty**

Name: CAS-00380-K0Q2Z4 - Abandoned Property  
Owner: Tom Malenfant

**Custom Fields**

Internal Submission? ☐

## Changing the Service Request Type

In order to change the service request type, you need to be in the “Velocity 365 Manager” view of the case form within Dynamics 365. Open the case record and navigate to the Admin section of the Case form. Once here, you select the checkbox “Override submitted type” and the system will display a warning message as follows:

“Warning: Overriding the request type will create a new case and cancel this current case record. Current customer and location details will be transferred to the new case, but all other custom details will need to be added manually to the detailed record. To proceed, select a different service request below, and save the current record. Uncheck this box to cancel”



**CAS-00364-S4N3N7 - Abandoned Property**

Priority: Normal | Created On: 7/18/2018 2:04 PM | Status: In Progress | Owner: Tom Malenfant

Identify (Active for 28 days, 20 hours) | Research | Resolve

Find Customer \* | Find Contact | Find Case

Find Contact: Mango Fruit | Find Case: CAS-00364-S4N3N7 - Abandoned Property

Phone to Case Process (Active for 28 days, 20 hours) | Next Stage

**Admin**

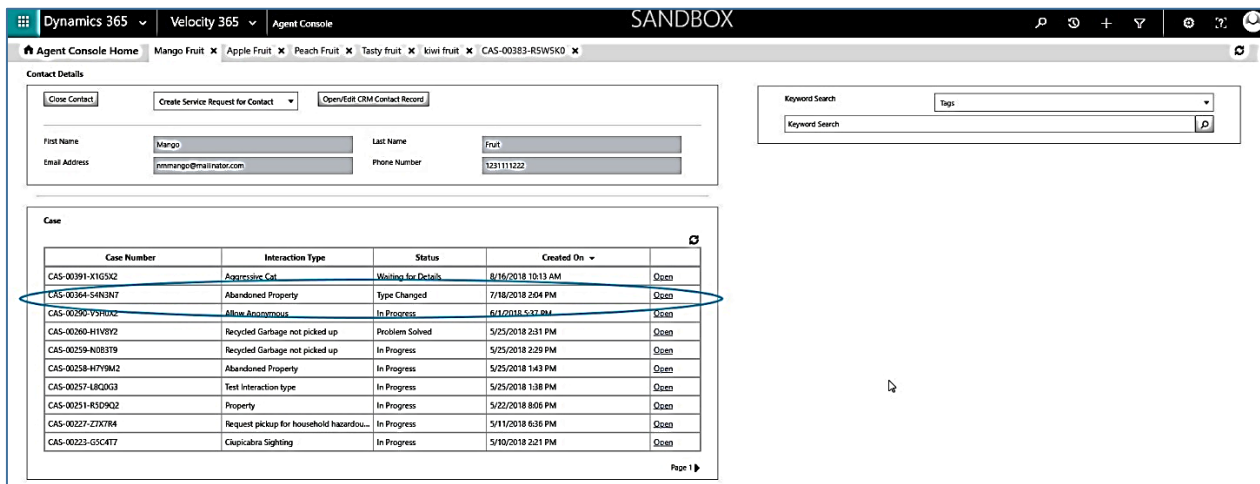
Override Submitted Type ☒   
 Warning: Overriding the request type will create a new case and cancel this current Case record. Current Customer and Location details will be transferred to the new case, but all other custom details will need to be added manually to the detailed record. To proceed, select a different Service Request below, and save the current record. Uncheck this box to cancel.

Override to New Request Type \*   
 Override Date: 8/16/2018   
 Override By: Tom Malenfant   
 New Parent Case: --

Velocity Admin   
 Conflicts Tab

Once you have selected the new service request type, you save the record and the changes will be reflected. You will also receive an email advising the type has been changed.

The screen shot below lists the cases for Mango Fruit and shows the original case as Abandoned Property with a status of “Type Changed” and the new case with the type of Aggressive Cat.



**Agent Console** | Mango Fruit | Apple Fruit | Peach Fruit | Tasty Fruit | Kiwi Fruit | CAS-00364-S4N3N7

Close Contact | Create Service Request for Contact | Open/Edit CRM Contact Record

First Name: Mango | Last Name: Fruit | Email Address: mmango@mailinator.com | Phone Number: 1231111022

Case

Case Number	Interaction Type	Status	Created On	
CAS-00364-S4N3N7	Aggressive Cat	Waiting for Details	8/16/2018 10:13 AM	Open
CAS-00364-S4N3N7	Abandoned Property	Type Changed	7/18/2018 2:04 PM	Open
CAS-00364-S4N3N7	Allow Anonymous	In Progress	6/1/2018 5:37 PM	Open
CAS-00260-H1V8Y2	Recycled Garbage not picked up	Problem Solved	5/25/2018 2:31 PM	Open
CAS-00259-N0B3T9	Recycled Garbage not picked up	In Progress	5/25/2018 2:29 PM	Open
CAS-00258-H7Y9M2	Abandoned Property	In Progress	5/25/2018 1:43 PM	Open
CAS-00257-ABG2Q3	Test Interaction type	In Progress	5/25/2018 1:38 PM	Open
CAS-00251-R3D9K2	Property	In Progress	5/22/2018 8:08 PM	Open
CAS-00227-Z7X7R4	Request pickup for household hazardous waste	In Progress	5/11/2018 6:36 PM	Open
CAS-00223-G1C4T7	Cupicabra Sighting	In Progress	5/10/2018 3:21 PM	Open

Page 1

# Subscriber Management

## What is a subscriber?

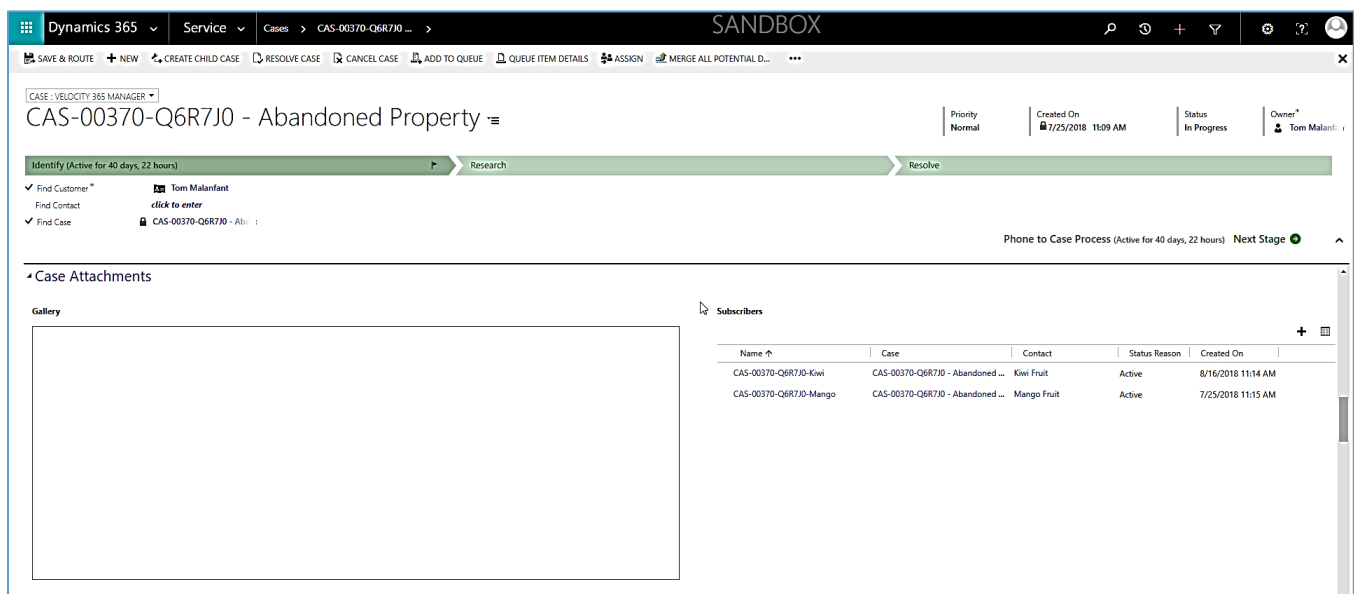
A subscriber is a contact that has been “associated” with a service request. By adding a contact as a subscriber they receive notifications about that specific service request based on the criteria set up for notifications for that service request type. If the service request type has been configured to send notifications when the status changes for example, then any contact who has been subscribed to the service request will receive a notification advising them of the update in status.



**Tip:** In order for a contact to receive notifications, the contact must have “opted in” to receive notifications via email under their profile. These notifications are set to “opt out” at registration to comply with your geographic privacy legislation.

## How to add a subscriber to an existing service request

In order to add a subscriber to an existing service request you need to open the specific service request in Microsoft Dynamics CRM. Once the service request is open, you navigate to the “Attachments” section of the form and from there you can add the subscriber as shown.



The screenshot shows the Microsoft Dynamics CRM interface for a service request case titled "CAS-00370-Q6R7J0 - Abandoned Property". The interface includes a top navigation bar with "Dynamics 365" and "Service" tabs. Below the navigation bar, there are tabs for "Identify", "Research", and "Resolve". The "Identify" tab is active, showing a search bar and a list of contacts. The "Research" tab is also visible, showing a list of subscribers. The "Resolve" tab is partially visible on the right.

The "Case Attachments" section is expanded, showing a "Gallery" and a "Subscribers" table. The "Subscribers" table lists the following data:

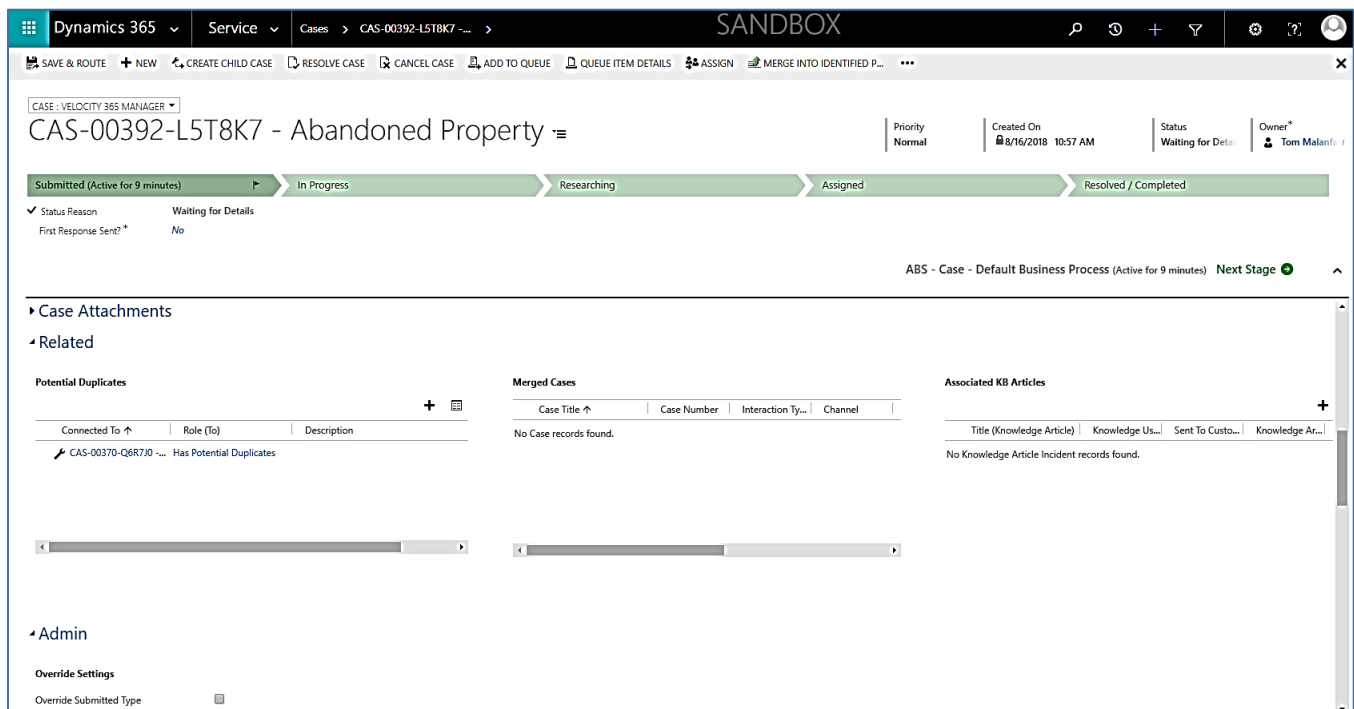
Name	Case	Contact	Status Reason	Created On
CAS-00370-Q6R7J0-Kiwi	CAS-00370-Q6R7J0 - Abandoned ...	Kiwi Fruit	Active	8/16/2018 11:14 AM
CAS-00370-Q6R7J0-Mango	CAS-00370-Q6R7J0 - Abandoned ...	Mango Fruit	Active	7/25/2018 11:15 AM

# Managing Duplicates

## How to detect potential duplicate service requests

When a call center agent creates a new service request, a background duplicate detection process is initiated and any potential duplicates are identified within Dynamics CRM. These are not readily visible to the Agent when taking the information as you always want to record each call, then identify potential duplicates to avoid multiple responses.

To illustrate, we already have an existing “Abandoned Property” service request and so if the call center agent attempts to create a new Abandoned Property service request at the same address, they will see the “Potential Duplicate” in the “Related” section of the form as shown below.

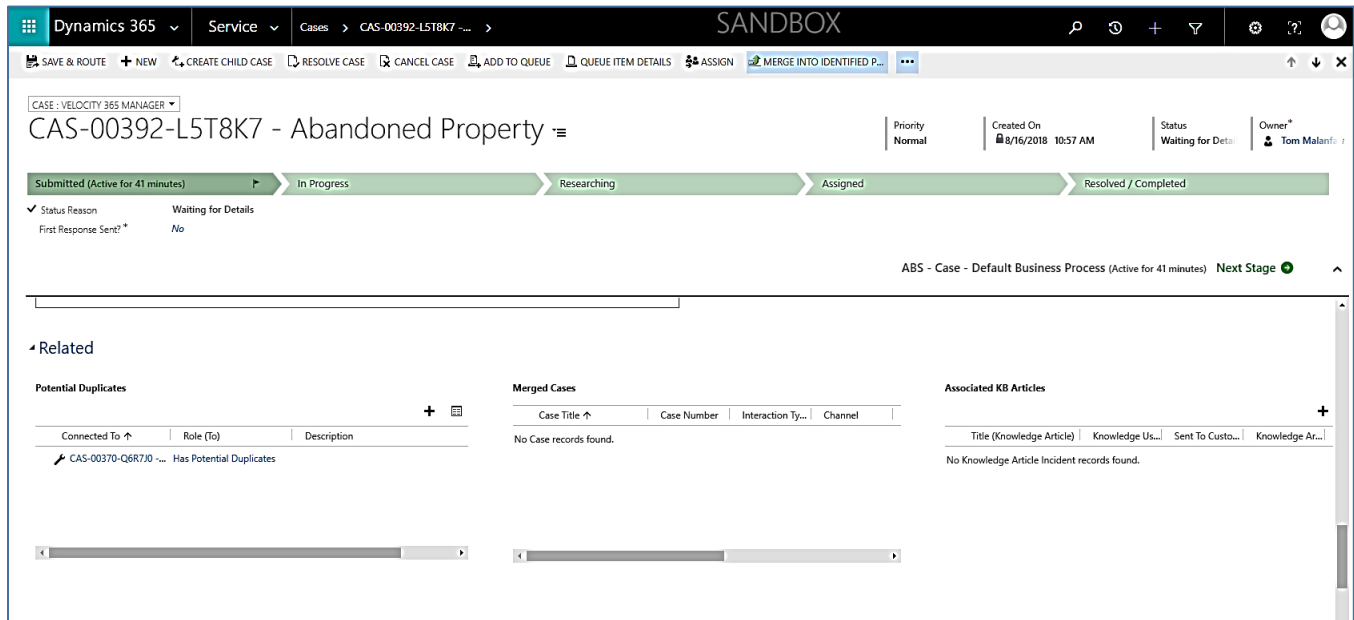


The screenshot shows the Dynamics 365 interface for a case titled "CAS-00392-L5T8K7 - Abandoned Property". The interface includes a top navigation bar with "Dynamics 365" and "Service" tabs. Below the navigation bar is a ribbon menu with options like "SAVE & ROUTE", "NEW", "CREATE CHILD CASE", "RESOLVE CASE", "CANCEL CASE", "ADD TO QUEUE", "QUEUE ITEM DETAILS", "ASSIGN", and "MERGE INTO IDENTIFIED P...". The case details section shows the case title, priority (Normal), created on date (8/16/2018 10:57 AM), status (Waiting for Details), and owner (Tom Malen). A progress bar indicates the case is in the "Submitted (Active for 9 minutes)" stage. Below the progress bar, there are sections for "Case Attachments", "Related", "Potential Duplicates", "Merged Cases", and "Associated KB Articles". The "Potential Duplicates" section shows a table with one entry: "CAS-00370-Q6R7J0 - Has Potential Duplicates". The "Merged Cases" section shows a table with no results. The "Associated KB Articles" section shows a table with no results. The "Admin" section at the bottom includes "Override Settings" and "Override Submitted Type".

## Merging a potential duplicate into Identified Parent Case

Once a case has been created and has been tagged as a “Potential Duplicate”, it will have an identified Parent Case associated with it. In order to merge the case into its parent case, you first open the case tagged as a potential duplicate in Dynamics CRM and scroll down to the “Related” section of the case form. After reviewing the case to determine if it is a true duplicate, you then scroll to the top of the Ribbon menu and click on “Merge

into Identified Parent” and the current (child) case will be assigned a status of “Cancelled” and the case now appears in the “Merged” cases sub grid on the parent case.



**CAS-00392-L5T8K7 - Abandoned Property**

Submitted (Active for 41 minutes) → In Progress → Researching → Assigned → Resolved / Completed

✓ Status Reason: First Response Sent? \* No

ABS - Case - Default Business Process (Active for 41 minutes) Next Stage

**Related**

**Potential Duplicates**

Connected To	Role (To)	Description
CAS-00370-Q6R7J0		Has Potential Duplicates

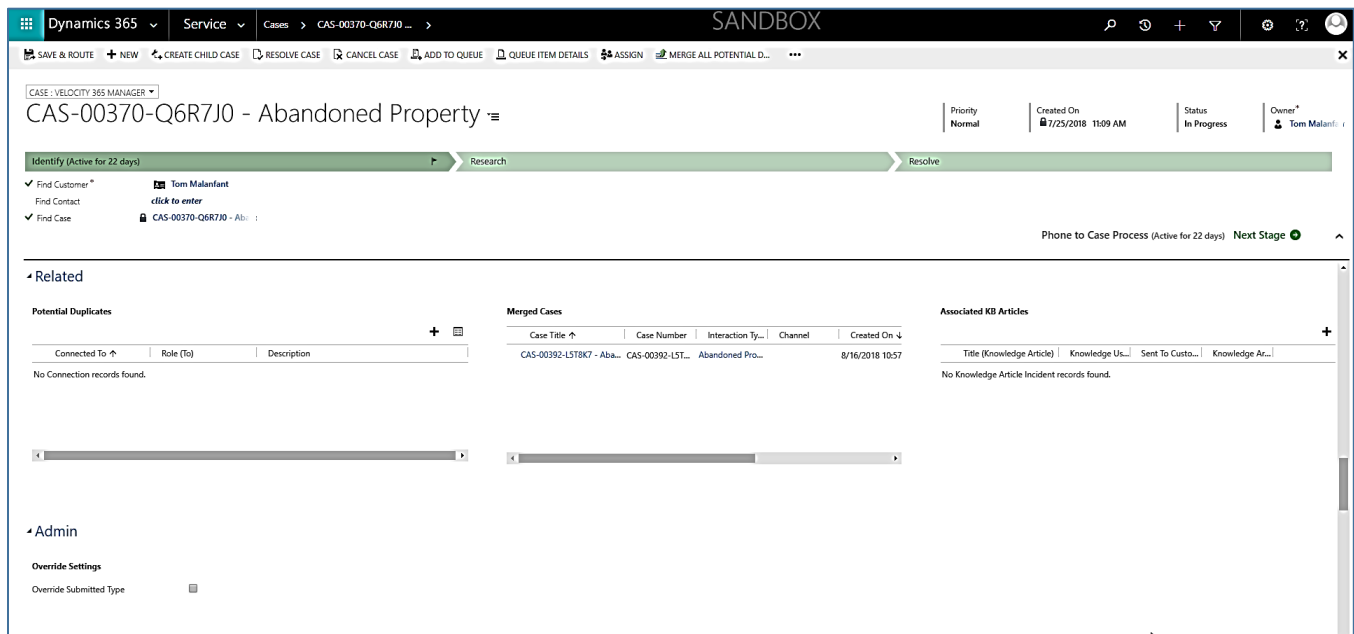
**Merged Cases**

Case Title	Case Number	Interaction Type	Channel
No Case records found.			

**Associated KB Articles**

Title (Knowledge Article)	Knowledge Us...	Sent To Custo...	Knowledge Ar...
No Knowledge Article Incident records found.			

Now when you go and open the Parent case in Dynamics CRM and scroll down to the “Related” section of the case form, the child case shows as a Merged Case into the Parent.



**CAS-00370-Q6R7J0 - Abandoned Property**

Identify (Active for 22 days) → Research → Resolve

✓ Find Customer \* Tom Malenfant  
Find Contact click to enter  
✓ Find Case CAS-00370-Q6R7J0 - Abandoned Property

Phone to Case Process (Active for 22 days) Next Stage

**Related**

**Potential Duplicates**

Connected To	Role (To)	Description
No Connection records found.		

**Merged Cases**

Case Title	Case Number	Interaction Type	Channel	Created On
CAS-00392-L5T8K7 - Abandoned Property	CAS-00392-L5T8K7	Abandoned Property		8/16/2018 10:57

**Associated KB Articles**

Title (Knowledge Article)	Knowledge Us...	Sent To Custo...	Knowledge Ar...
No Knowledge Article Incident records found.			

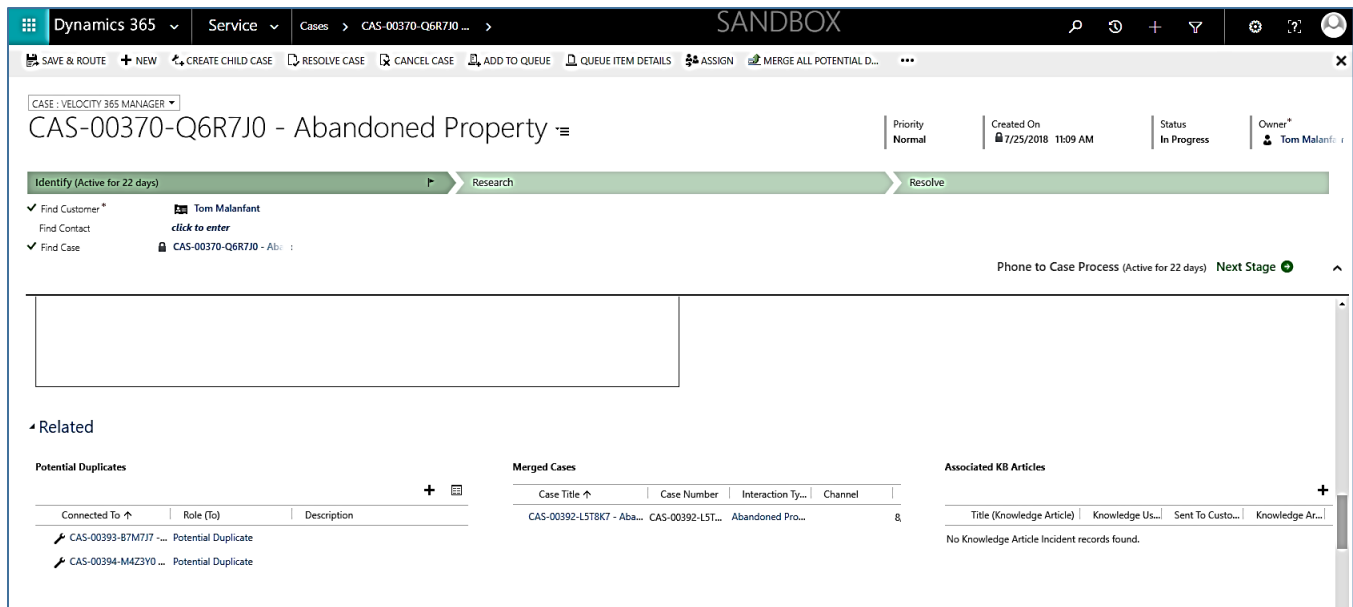
**Admin**

**Override Settings**

Override Submitted Type

## Merging potential duplicate child cases from a parent case

If multiple cases are created and the system has identified them as potential duplicates, you can **merge** all the duplicate child cases once you have confirmed they are in fact, duplicates. To illustrate we have created 2 new Abandoned Property cases at 240 Richmond St, in Toronto. They have been identified as potential duplicates of the parent case. When you view the parent case and scroll down to the related section of the case form, you see them listed as potential duplicates as shown below.



**CAS-00370-Q6R7J0 - Abandoned Property**

Priority: Normal | Created On: 7/25/2018 11:09 AM | Status: In Progress | Owner: Tom Malenfant

Identify (Active for 22 days) | Research | Resolve

Find Customer: Tom Malenfant  
Find Contact: click to enter  
Find Case: CAS-00370-Q6R7J0 - Abandoned Property

Phone to Case Process (Active for 22 days) | Next Stage

**Related**

**Potential Duplicates**

Connected To	Role (To)	Description
CAS-00393-87M777	Potential Duplicate	
CAS-00394-M4Z3Y0	Potential Duplicate	

**Merged Cases**

Case Title	Case Number	Interaction Ty...	Channel
CAS-00392-L5T8K7 - Aba...	CAS-00392-L5T...	Abandoned Pro...	8

**Associated KB Articles**

Title (Knowledge Article)	Knowledge Us...	Sent To Custo...	Knowledge Ar...
No Knowledge Article Incident records found.			

In order to merge these you click on the “Merge All Potential Duplicates” in the top ribbon bar if the case form, and select the current case as the parent case. All potential cases are then merged to the parent case and potential duplicates are no longer visible in the “Potential Duplicate” sub grid on the parent case and are now shown as “Merged Cases”.



Dynamics 365
Service
Cases > CAS-00370-Q6R7J0 ...

SANDBOX

SAVE & ROUTE
NEW
CREATE CHILD CASE
RESOLVE CASE
CANCEL CASE
ADD TO QUEUE
QUEUE ITEM DETAILS
ASSIGN
MERGE ALL POTENTIAL D...

CASE : VELOCITY 365 MANAGER
CAS-00370-Q6R7J0 - Abandoned Property

Priority  
Normal

Created On  
7/25/2018 11:09 AM

Status  
In Progress

Owner\*  
Tom Malanfi

Identify (Active for 22 days, 1 hour)
Research
Resolve

Find Customer\*
Find Contact
Find Case

Tom Malanfi  
click to enter  
CAS-00370-Q6R7J0 - Ab...

Phone to Case Process (Active for 22 days, 1 hour)
Next Stage

Related

Potential Duplicates

Connected To	Role (To)	Description
No Connection records found.		

Merged Cases

Case Title	Case Number	Interaction Ty...	Channel
CAS-00394-M4Z3Y0 - Ab...	CAS-00394-M4...	Abandoned Pro...	8
CAS-00393-87M7I7 - Ab...	CAS-00393-87...	Abandoned Pro...	8
CAS-00392-L5T8K7 - Aba...	CAS-00392-L5T...	Abandoned Pro...	8

Associated KB Articles

Title (Knowledge Article)	Knowledge Us...	Sent To Custo...	Knowledge Ar...
No Knowledge Article Incident records found.			

## Informing Subscribers their Case has been Merged

If cases have been merged and they had individual subscribers, Dynamics CRM looks for any subscribers on the merged cases and copies over all subscribers to the updated parent case. Simultaneously, Dynamics will send out notification emails to all copied subscribers that their case base been merged and the email will contain a link to view the details of the parent case. If the subscriber of the original case was to login to the portal, they would see the new Parent case in their view of “Cases that I am subscribed to” and could view the details of the case.