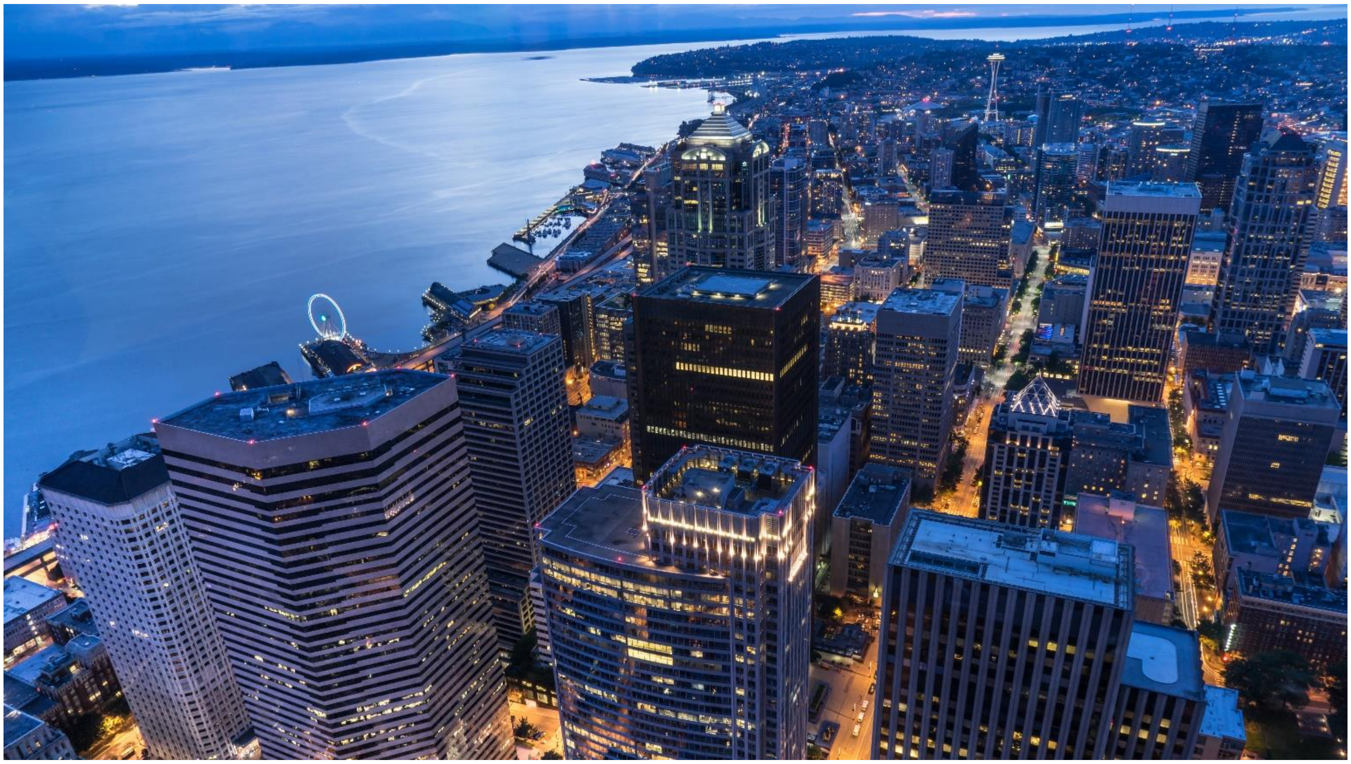

End User Guide

Version 2.2

March 2019

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Table of Contents

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

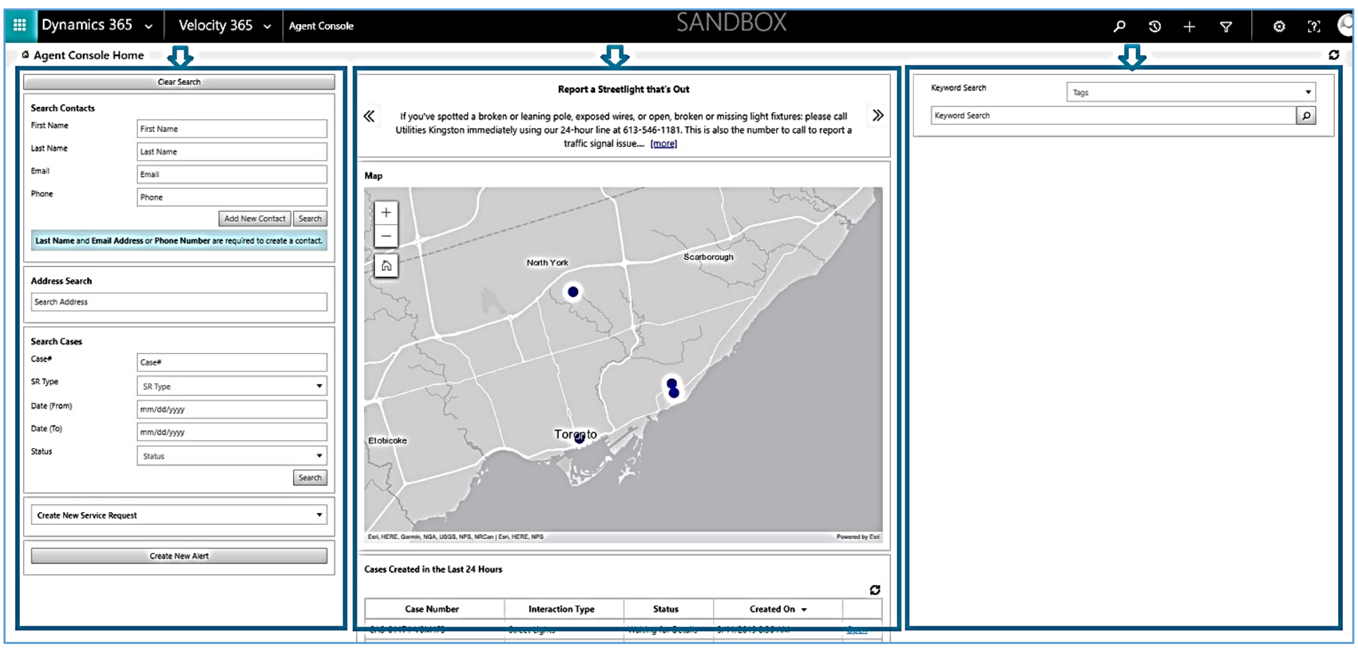
The Agent Console is the single point of entry for call center agents to access interconnected information. It provides a 360 degree view of the caller's contact information, along with any previous interaction history including phone calls, service requests and their resolutions and notes. This allows 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

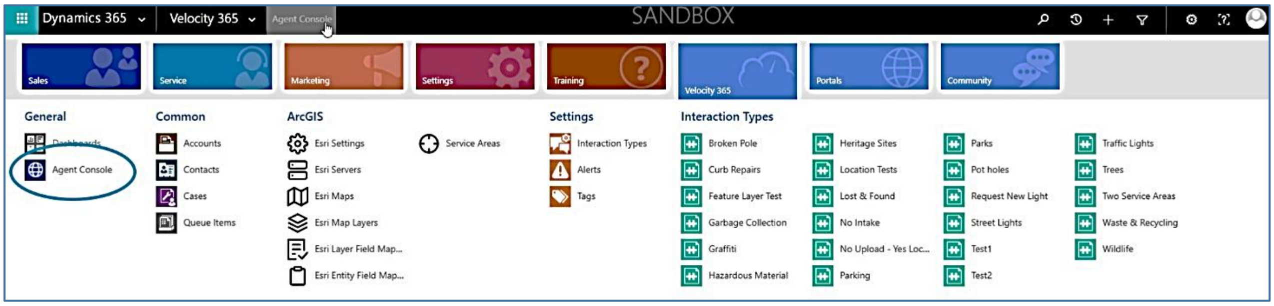
This pane contains knowledge base articles relative to the case and may also contain call scripting



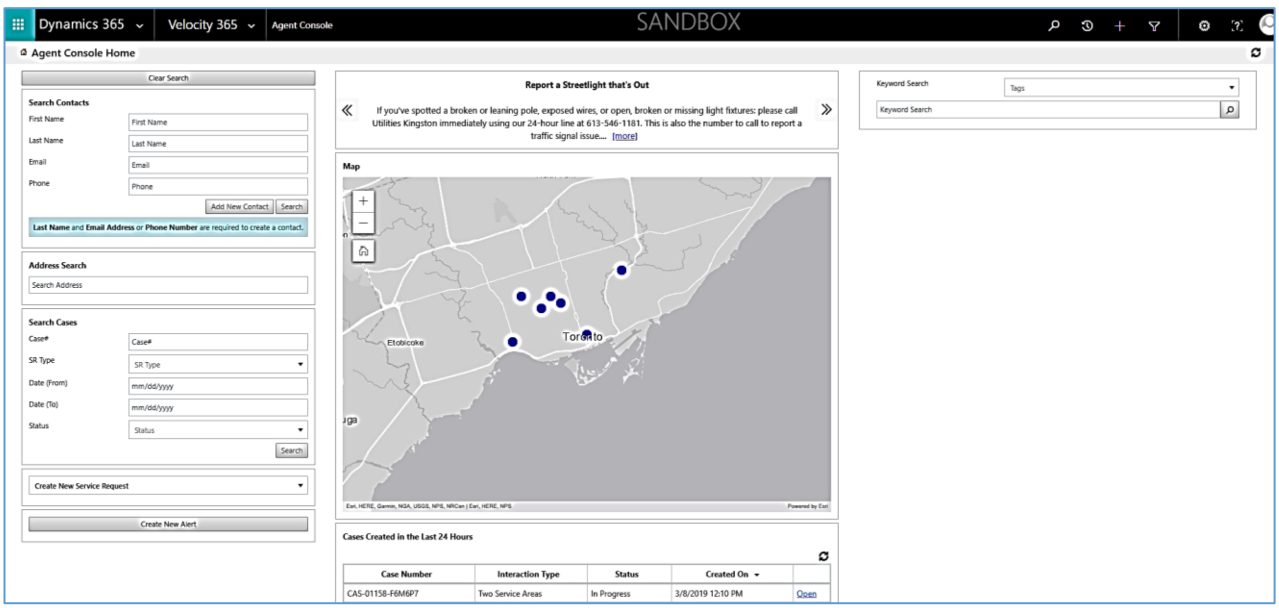
The call center agent can also open tabs from the middle pane to access existing information in Dynamics 365.

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.

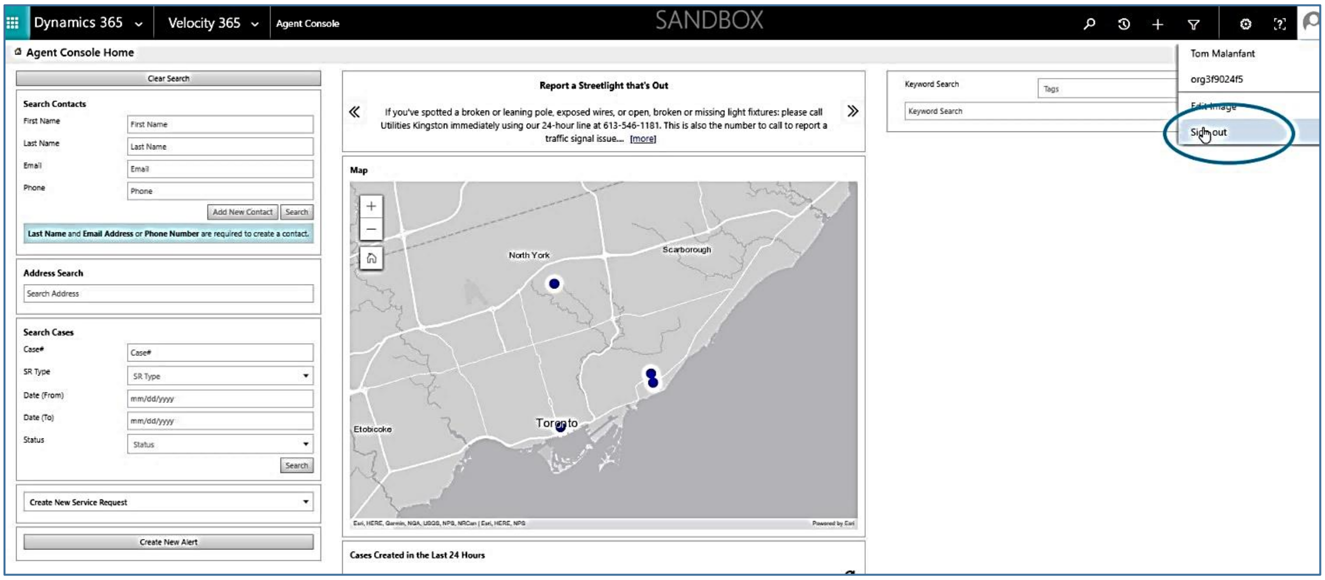


The Agent Console Home screen appears.



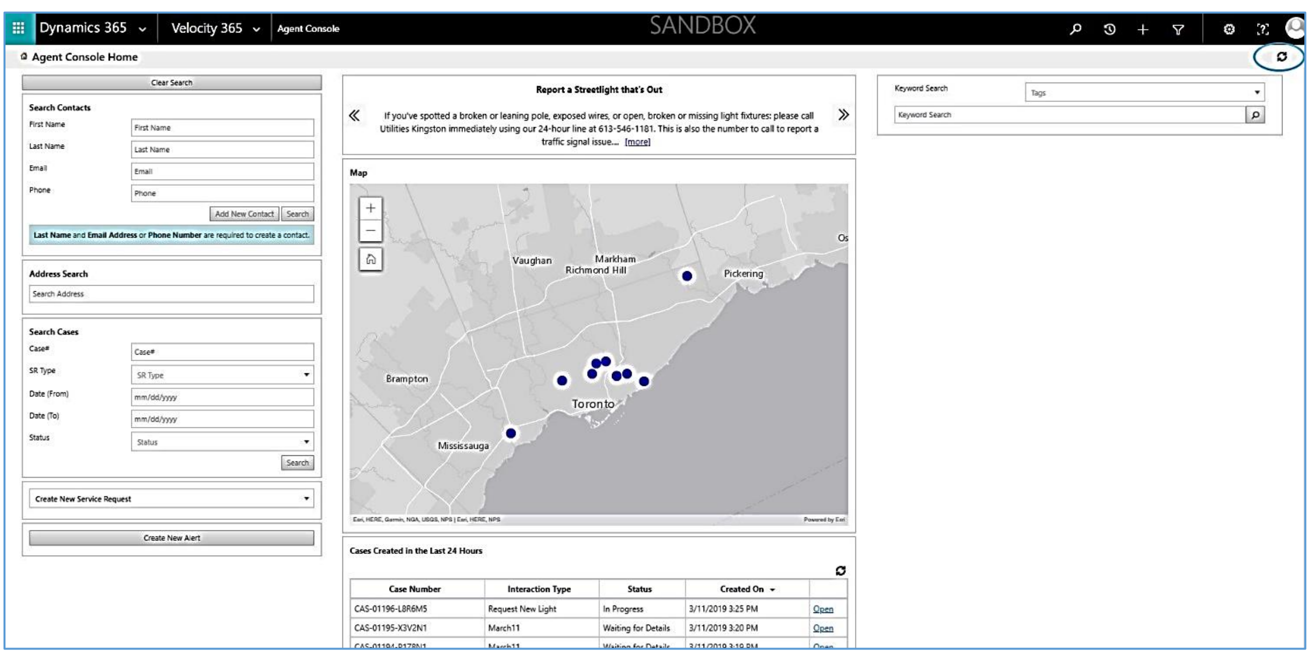
How to Log out of the Agent Console

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.

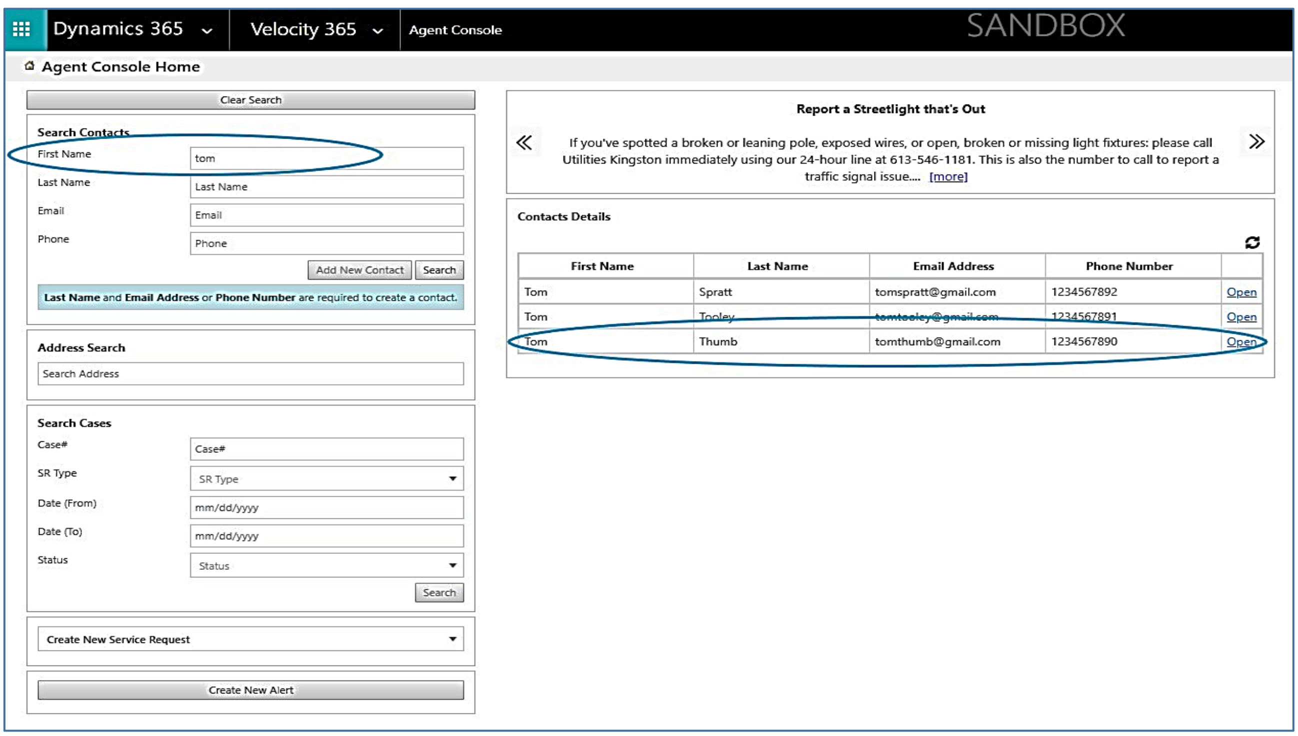


Managing Contacts

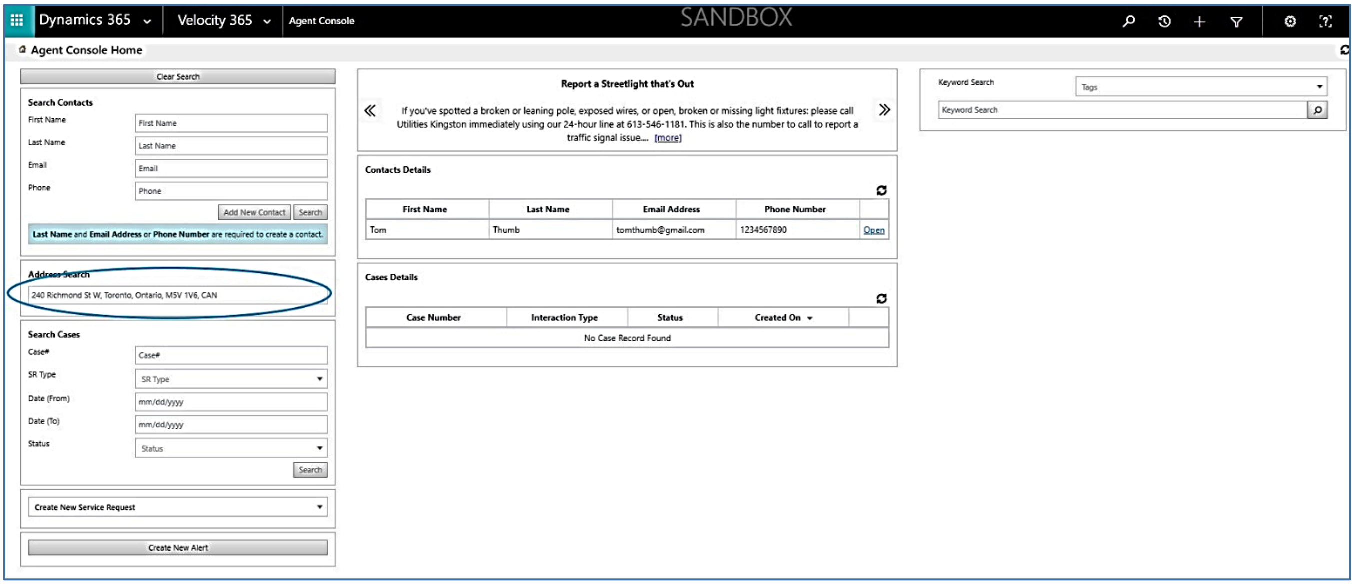
Searching for an Existing Contact

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.

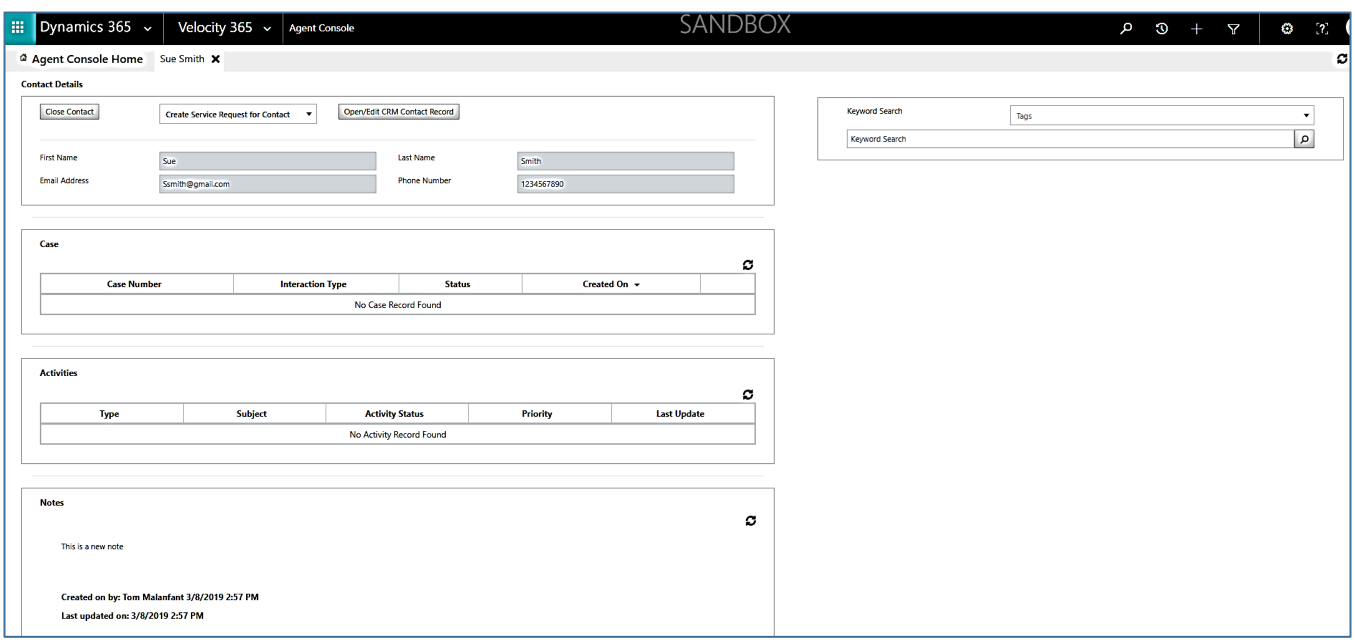


You can also search for a contact by street address by entering the address in the ***Address Search*** field and any contacts (or cases) associated with that address are returned as shown.



Adding/Updating Notes to an Existing Contact

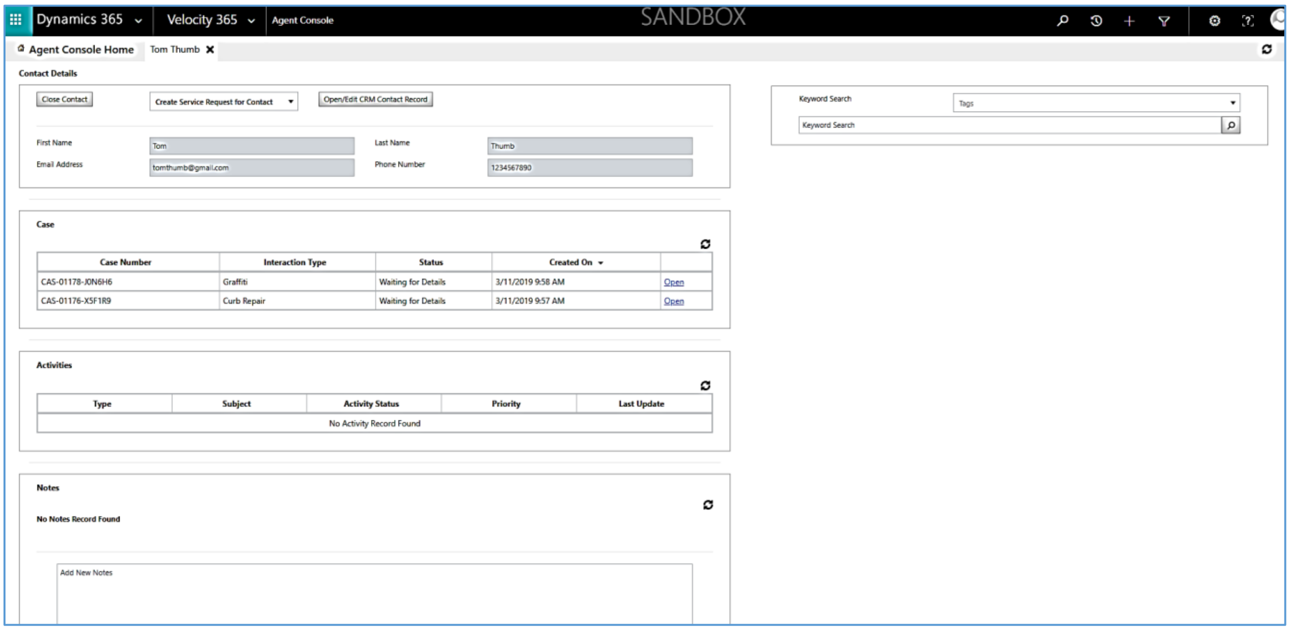
To add notes to an existing contact, once the contact is open on the Contact Details page you can add notes by entering the notes in the "Notes" section and clicking on the <save> button. The screen will update showing the user who entered/updated the notes and the time of creation and updating. This 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.



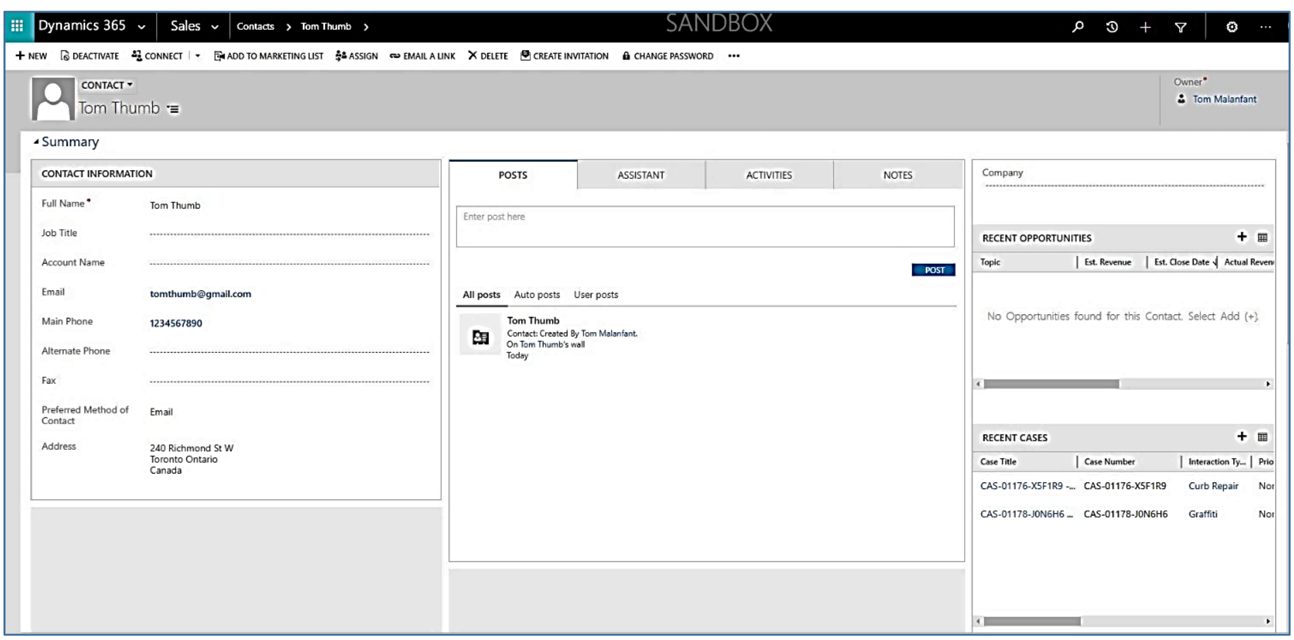
Editing an Existing Contact

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.



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



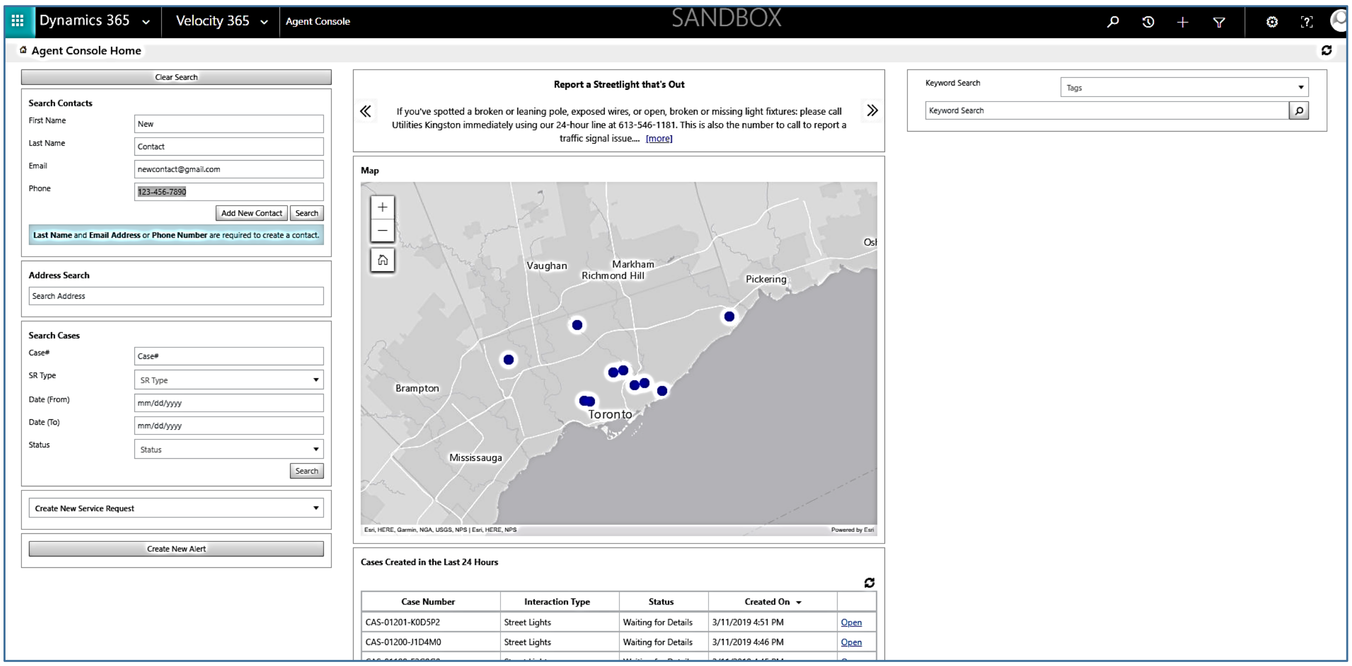
This contact summary record shows all the contact information as well as any posts, activities or notes related to the contact. It also shows the recent cases created either by the contact themselves on the portal, or on behalf of the contact when they called your office.

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.

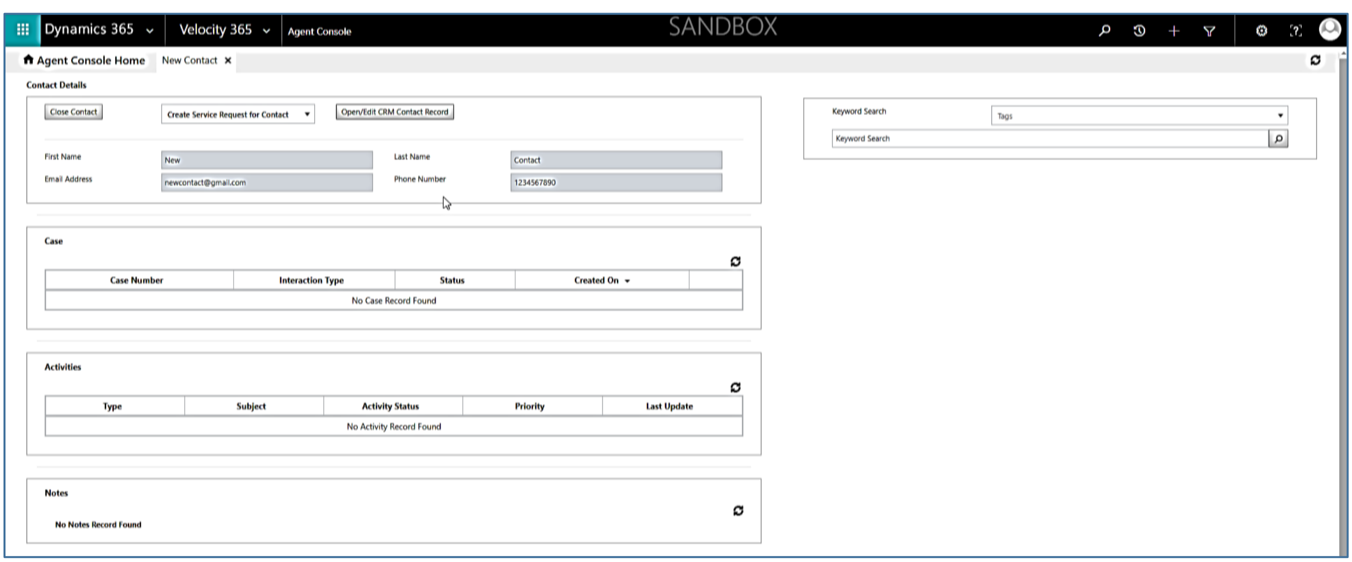
Creating a New Contact

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.

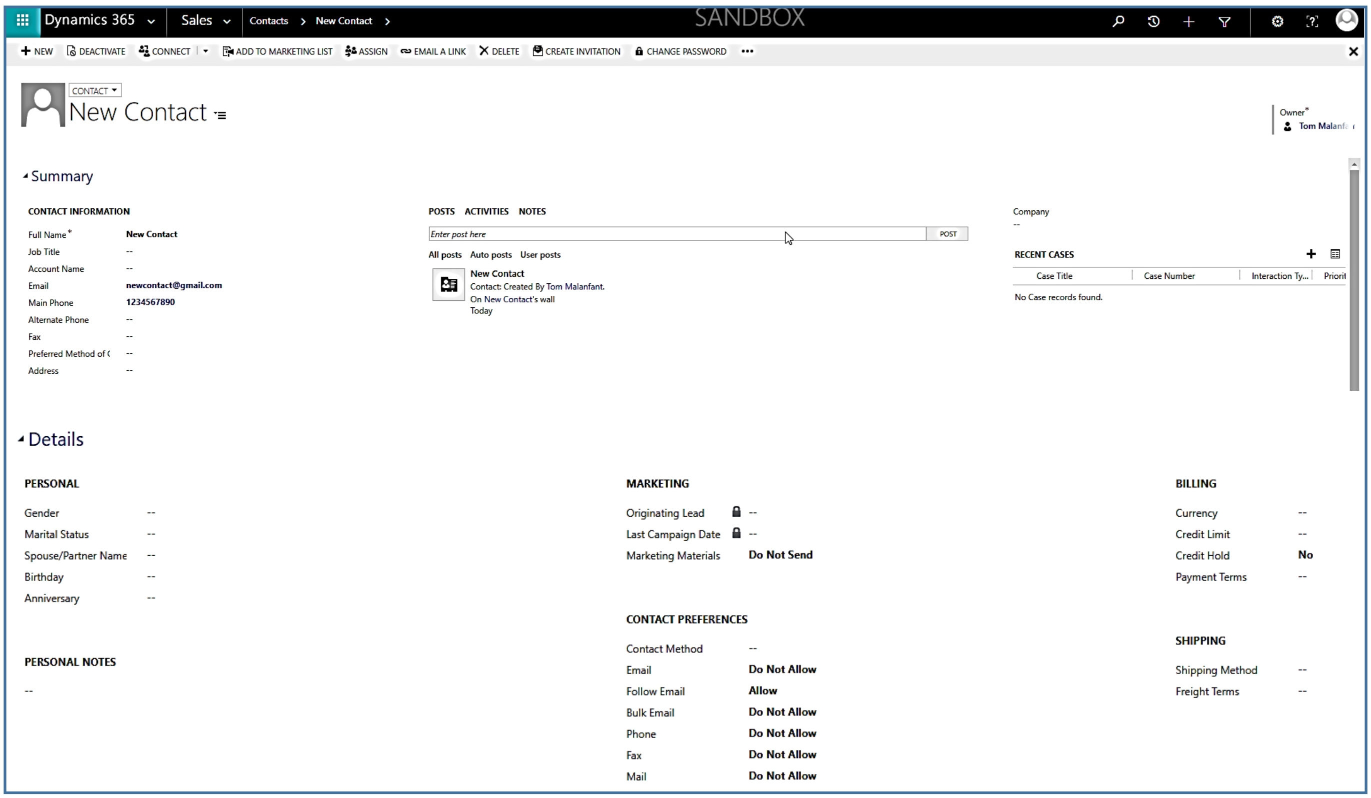


Once you have created the contact, the Contact Details screen is shown.



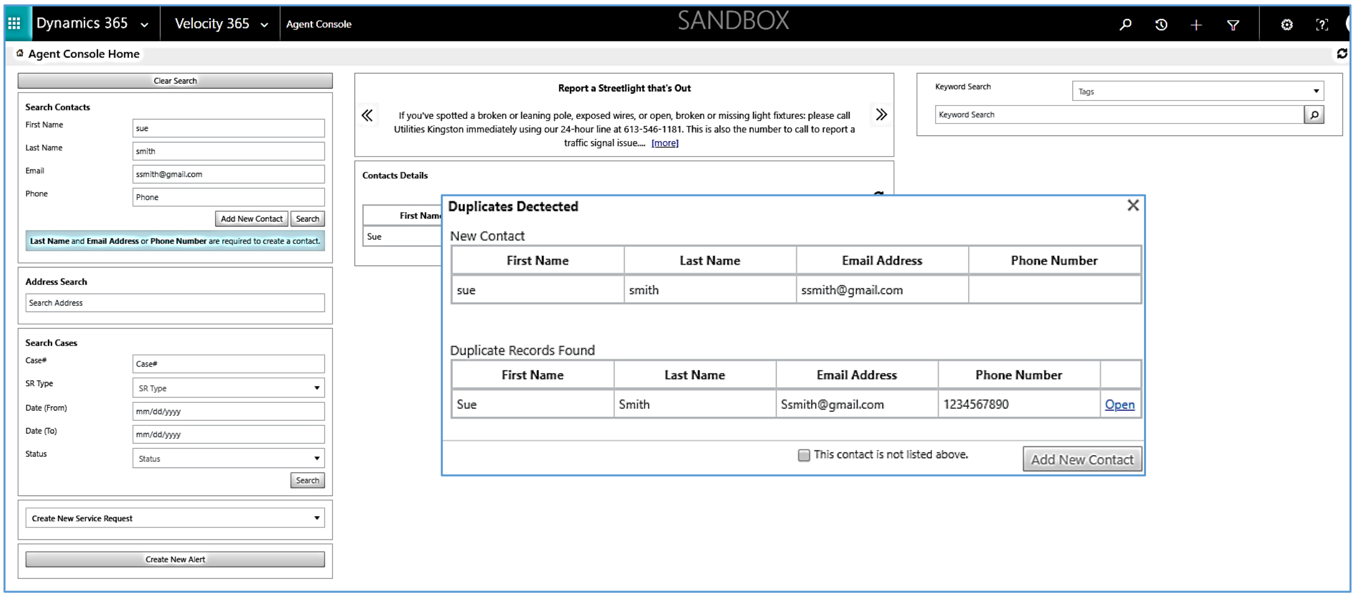
From here you can open the contact record in Dynamics 365 to add more details related to the contact. To do this, you click on ***Open/Edit CRM Contact*** Record and the contact record is displayed. This record shows who created the contact as well as any posts, activities or notes associated with the 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".



Duplicate Contacts

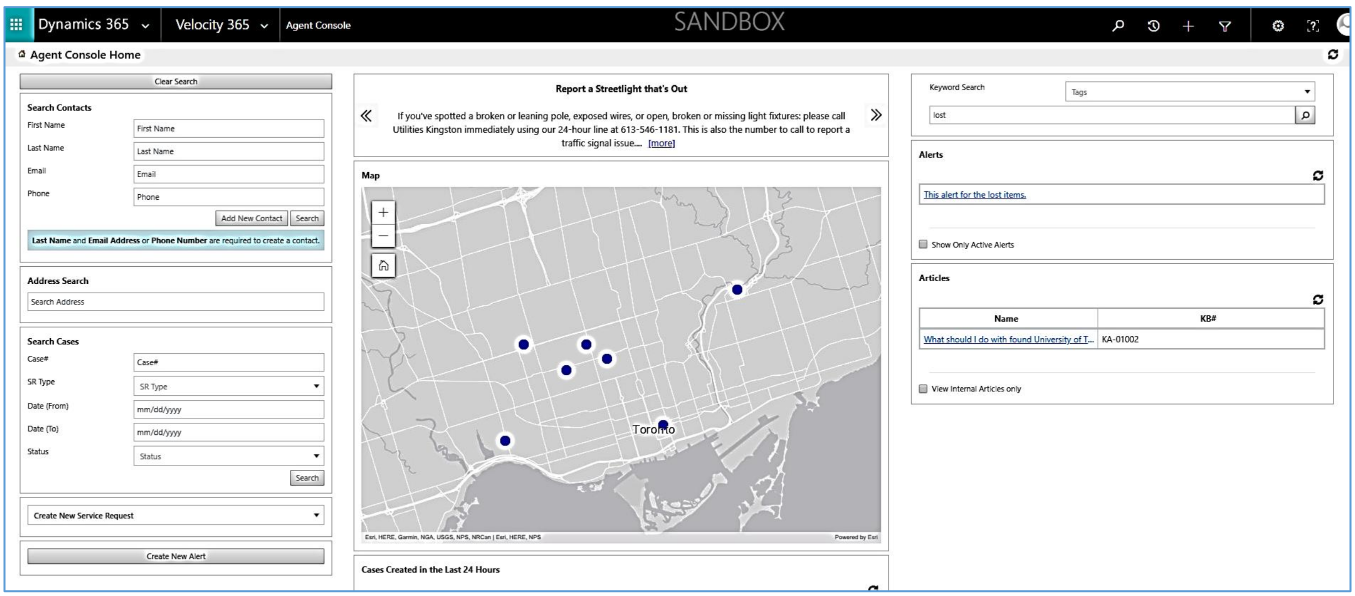
If you are trying to add a new contact and there is already an existing contact, you will receive a pop-up message indicating that a duplicate contact has been detected. You can click on the ***Open*** link to open the contact in Dynamics to view its properties, or alternatively you can check the box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



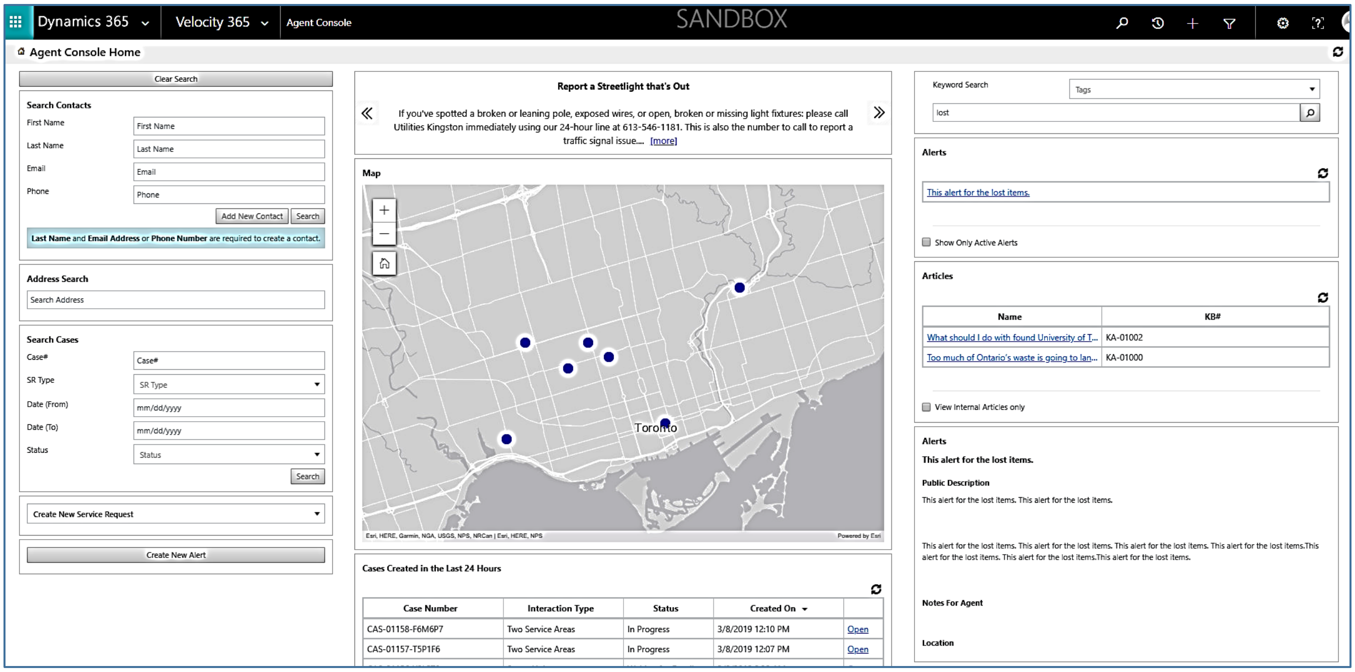
Using Alerts

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.



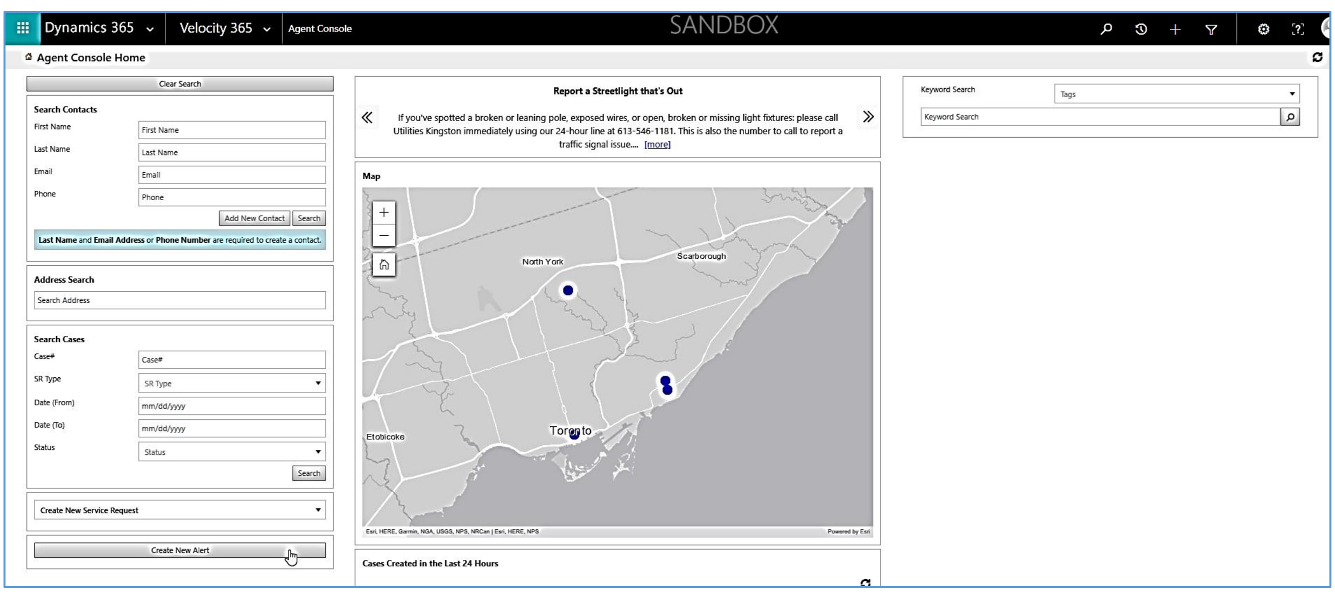
By clicking on the specific alert, the details are then shown in the Agent Console window. You can also filter the results to only show active alerts if desired by checking the box. If you click on the link associated with the alert, it will open the alert in Dynamics 365 and allow you to edit/update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



All active alerts are also shown in the center pane of the Agent Console home screen and you can get more detailed information on any one alert by clicking on the ***….more*** at the end of the alert message. You can also scroll through all active alerts with the arrows on the right and left hand side of the alert messages.

Creating an Alert from the Agent Console

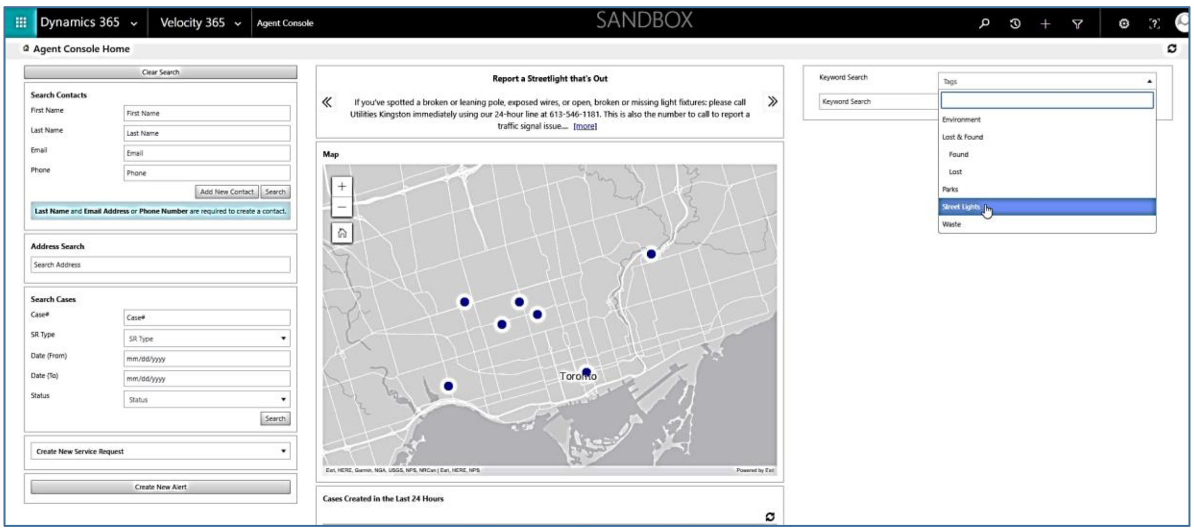
To create a new Alert directly from the Agent Console, click on the “Create New Alert” button. From here, the standard Dynamics functionality of creating alerts is the same as if you were creating the alert directly from Dynamics. This button is designed to facilitate quicker access to creating alerts for agents.



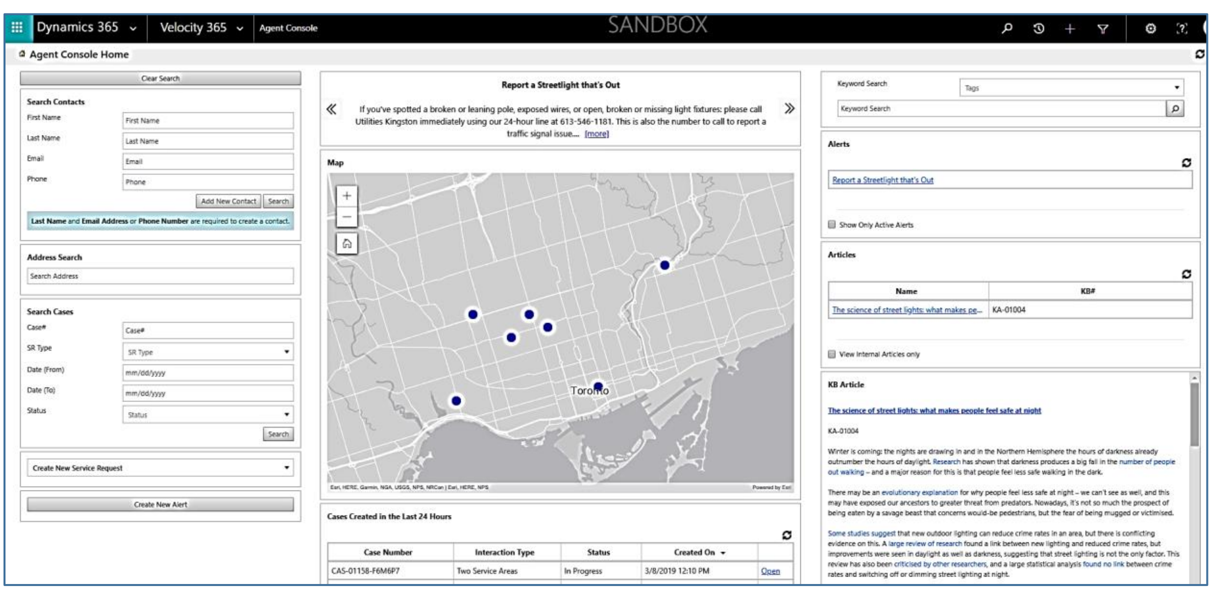
Using the Knowledge Base

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”.



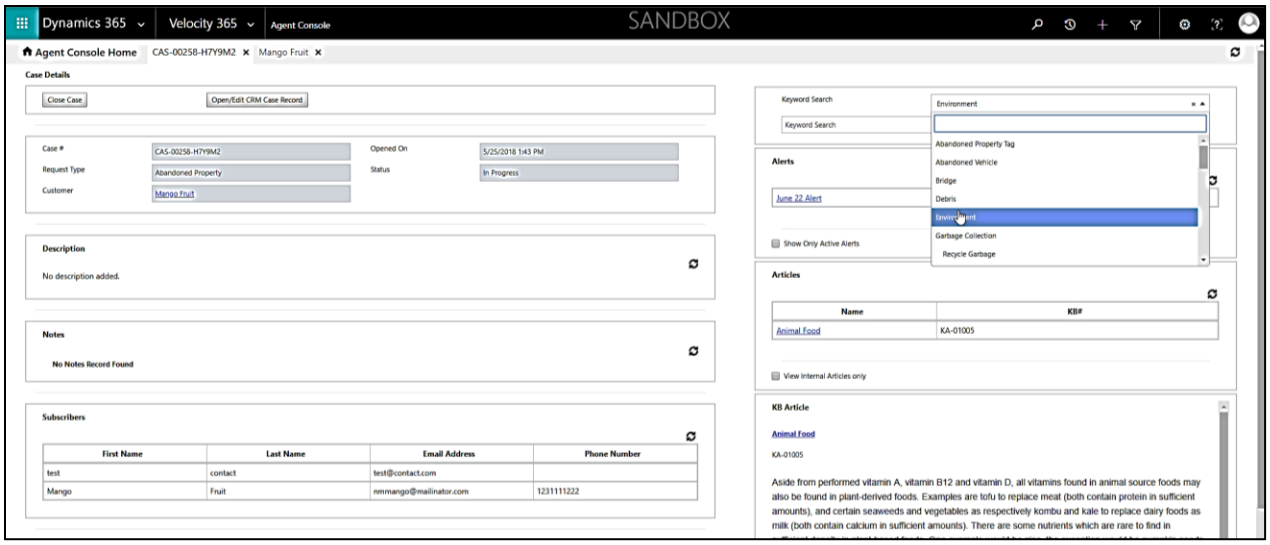
The resulting knowledge base article is then displayed in the Agent Console. You also have the option of displaying only internal articles by checking the appropriate dialogue box. If you click on the link associated with the knowledge base article, the article will open in Dynamics 365 and allow you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



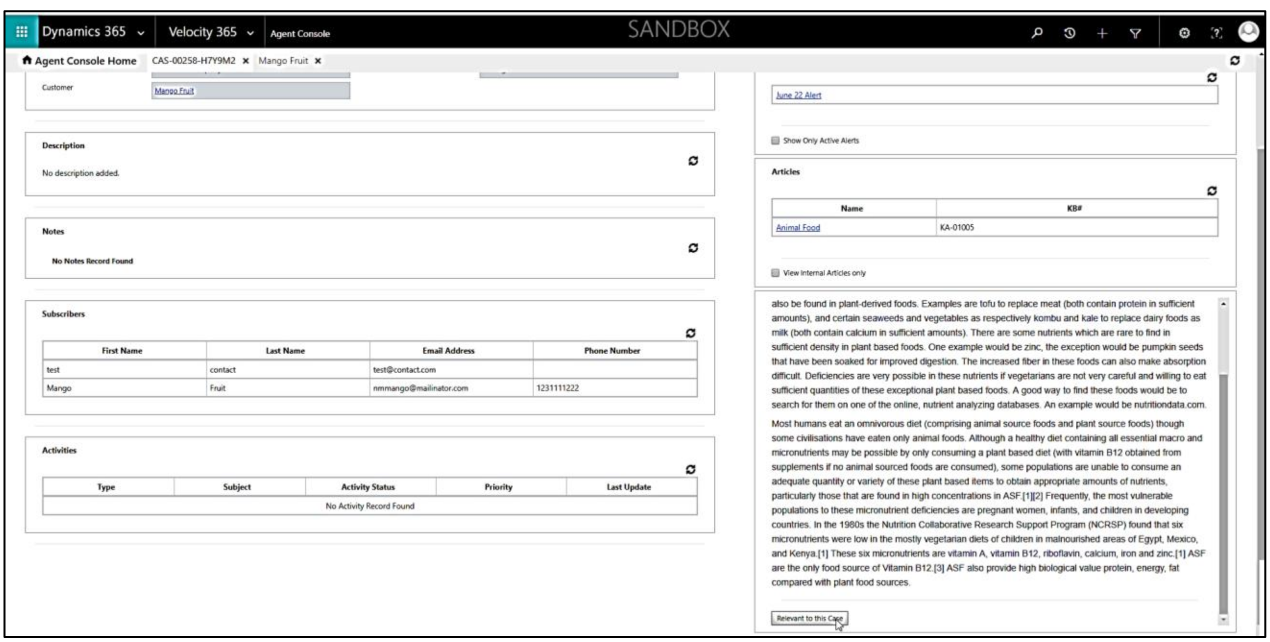
Searching a Knowledge Base Article from within Case Details Tab

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.

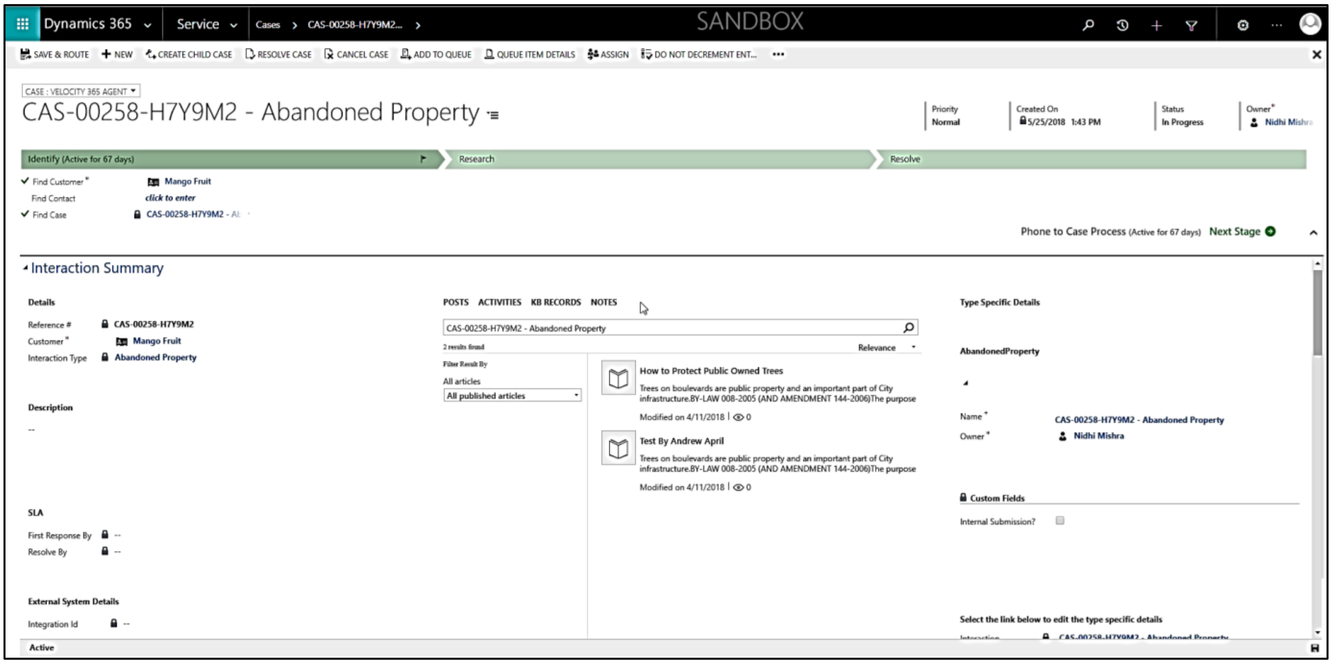
This shows searching for the "Environment" tag in the drop down while on the selected case tab.



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.



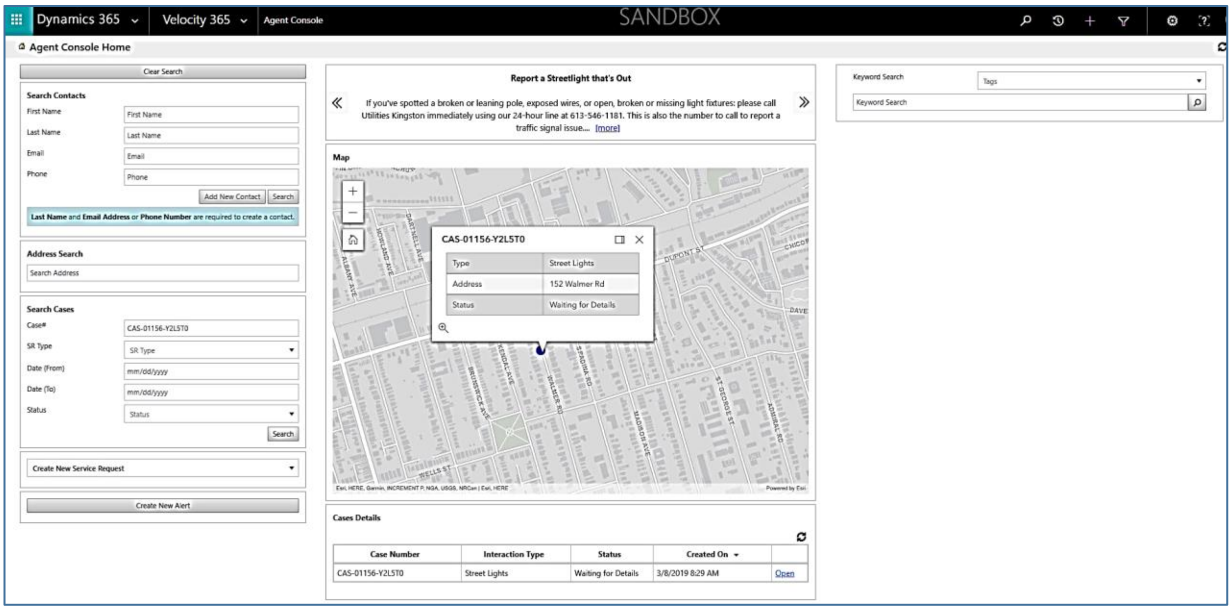
If you click on the ***Open/Edit CRM Case Record*** link to open the case record inside CRM, then click on the KB Records link, you will see the record associated with the case as shown.



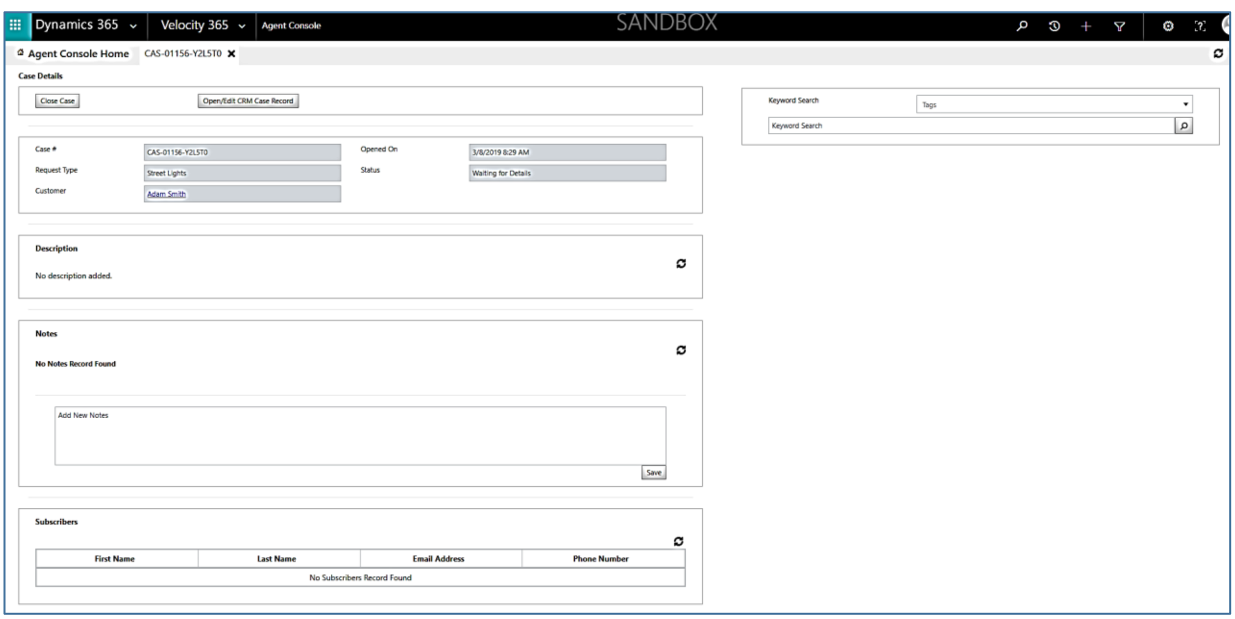
Service Requests

Searching for a Service Request by Case Number

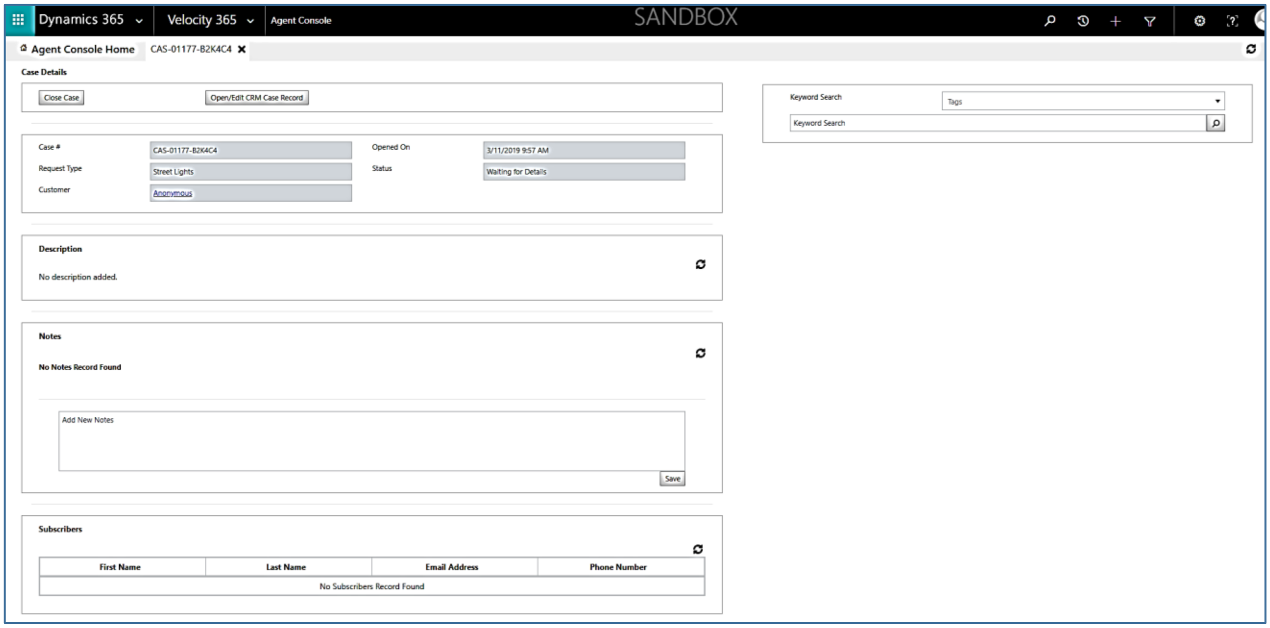
To search for an existing service request (case) by case number, enter the case number in the search field and press [Enter} or click ***Search***. The case location is then centered on the map and the case number and status is displayed as shown.



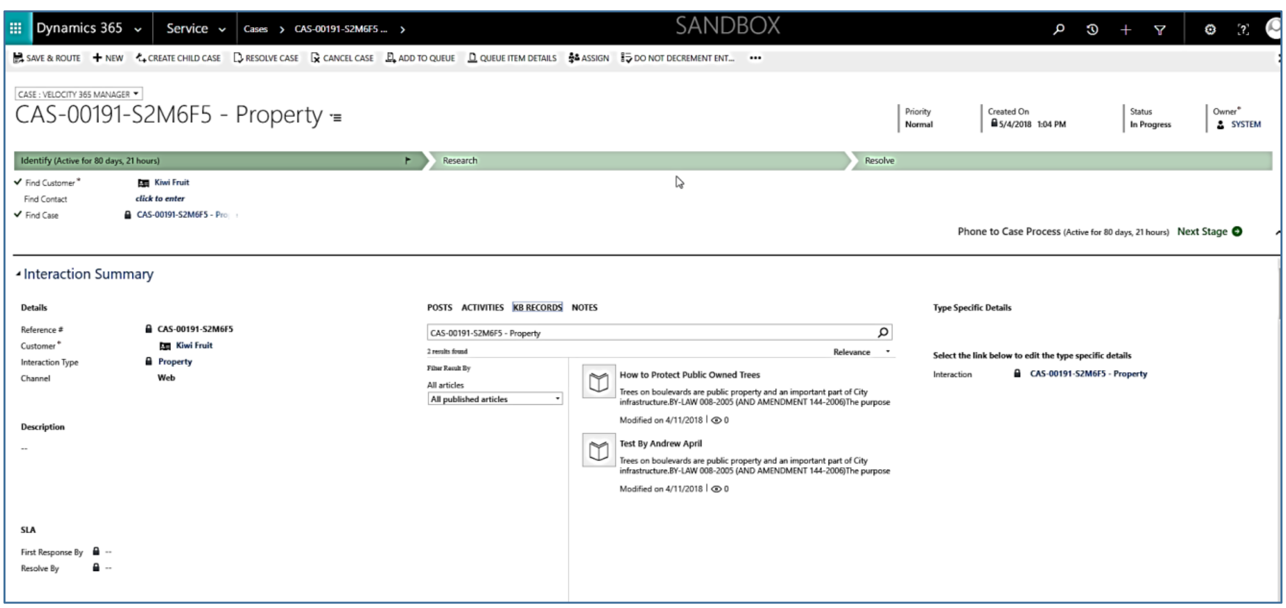
To open the case, click on ***Open*** and the Case Details screen is shown in the Agent Console screen.



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.

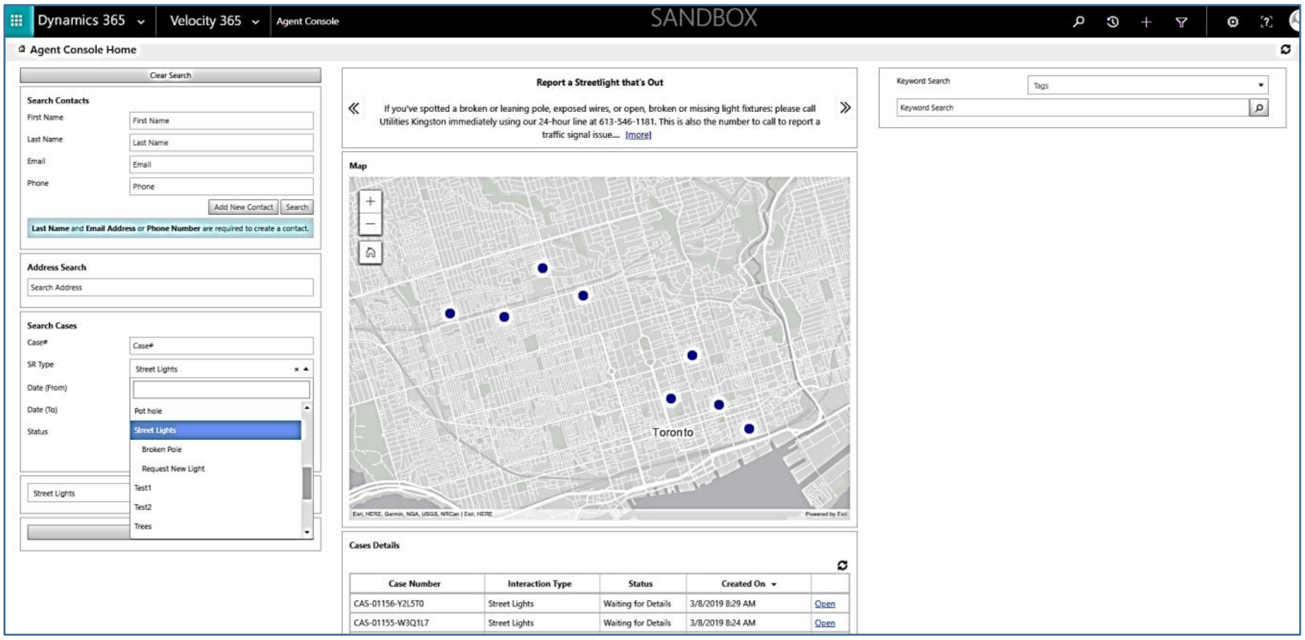


If you need to edit the case further in Dynamics 365, you can click on ***Open/Edit CRM Case Record*** and edit any of the properties associated with the case. The detailed training on editing case records is part of the Dynamics 365 for Customer Service training and not covered in this guide.

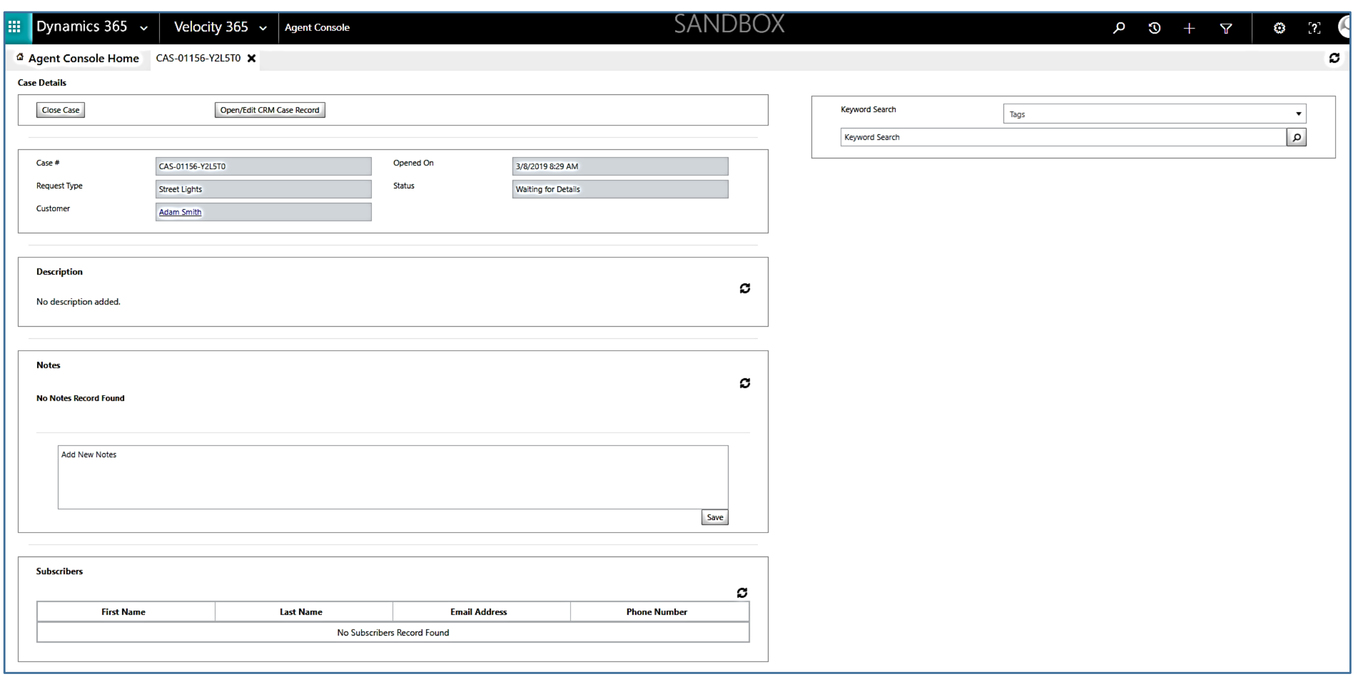


Searching for a Service Request by Service Request Type

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***.



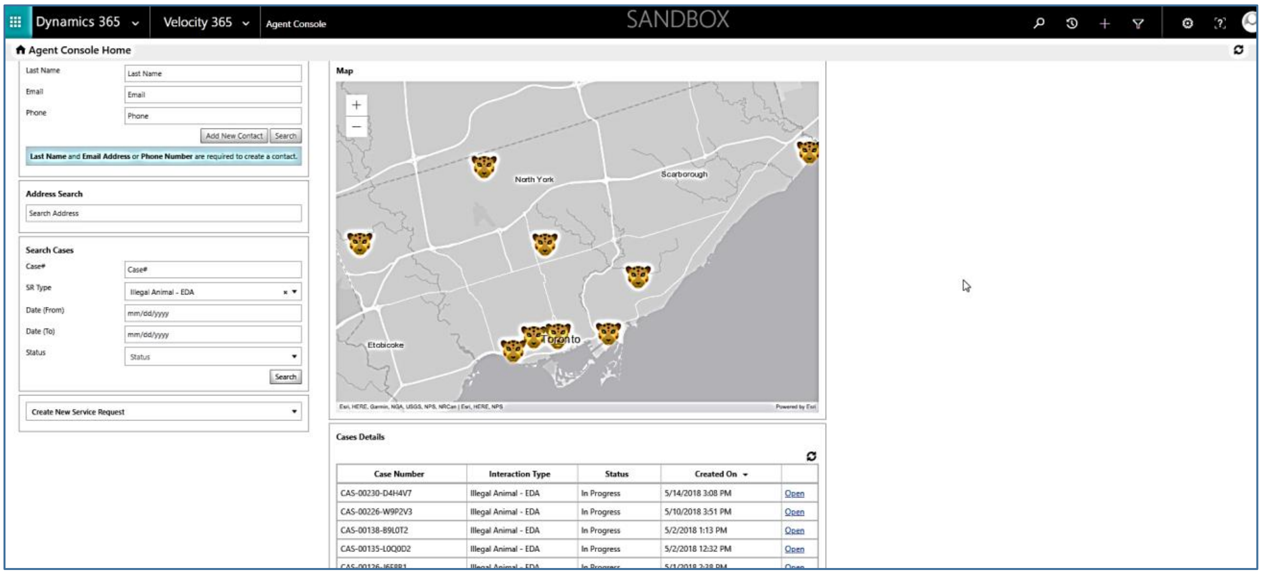
The service requests for the selected type appear in the Agent Console screen and also on the map. You can view the case number, status and the date the case was created. If you need to view additional details about the case, you can click on the link to open the case in the Agent Console.



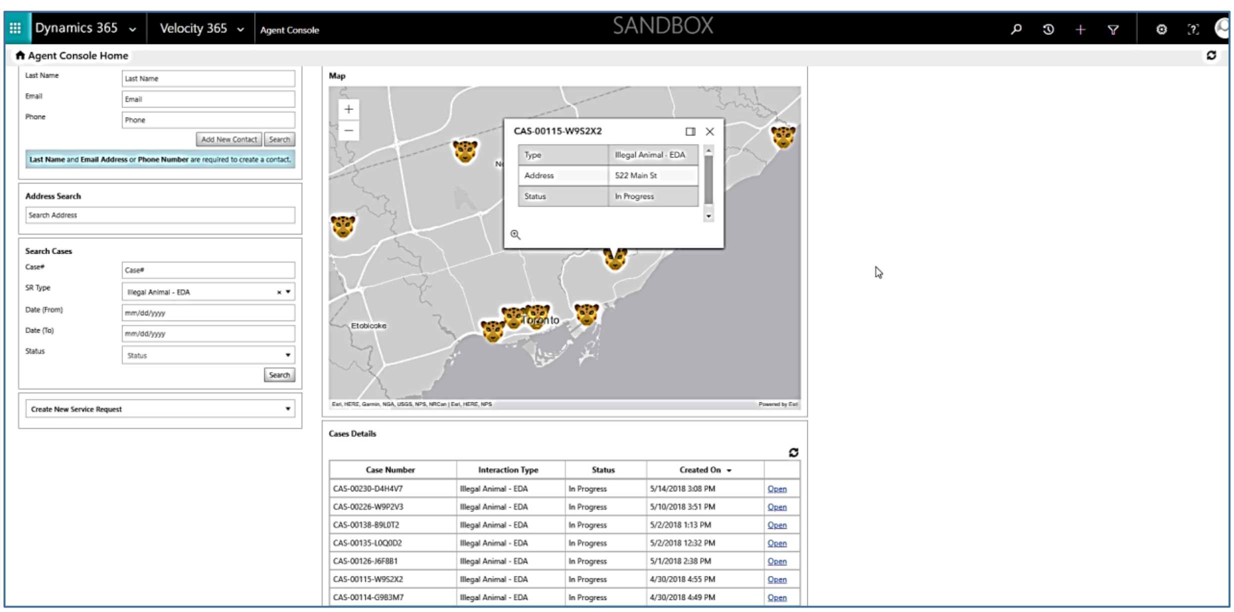
This view shows the description of the case, notes and activities as well as a list of any people who have subscribed to be notified about the case. If you need to edit the case in Dynamics 365, you can click on ***Open/Edit CRM Case Record*** and edit any of the properties associated with the case. 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.

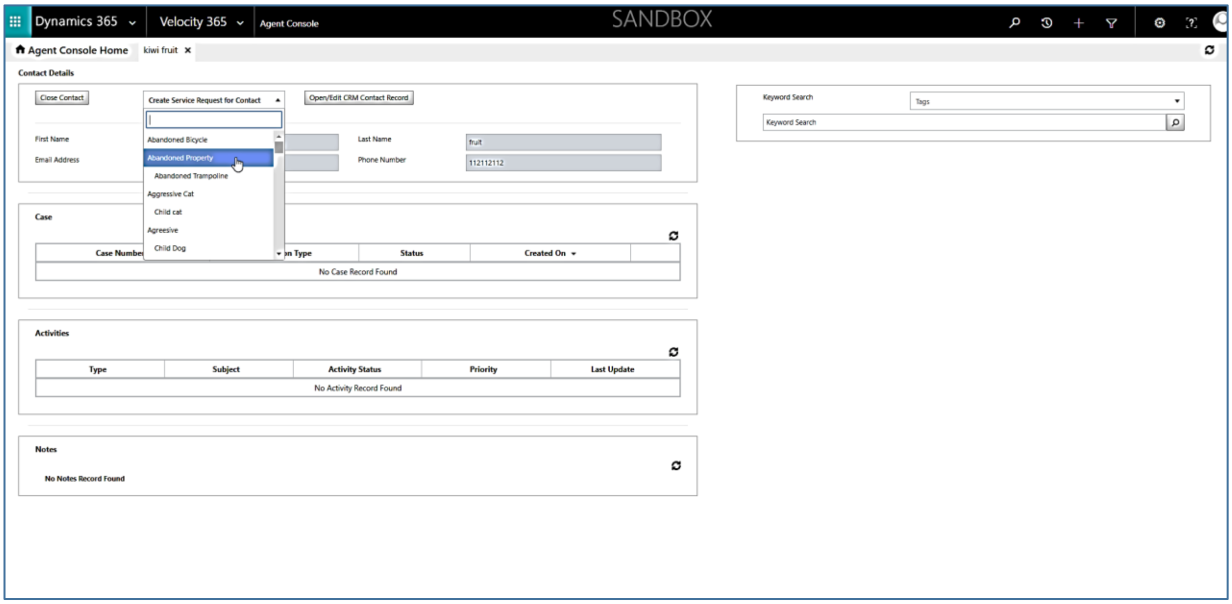


From here you can zoom in and out or see the specific details regarding any of the cases shown on the map by clicking on the specific case. A dialogue box appears showing the location, status and SR type. You can also click on the magnifying glass to center the map on that case.



Creating a new Service Request from a Contact Record

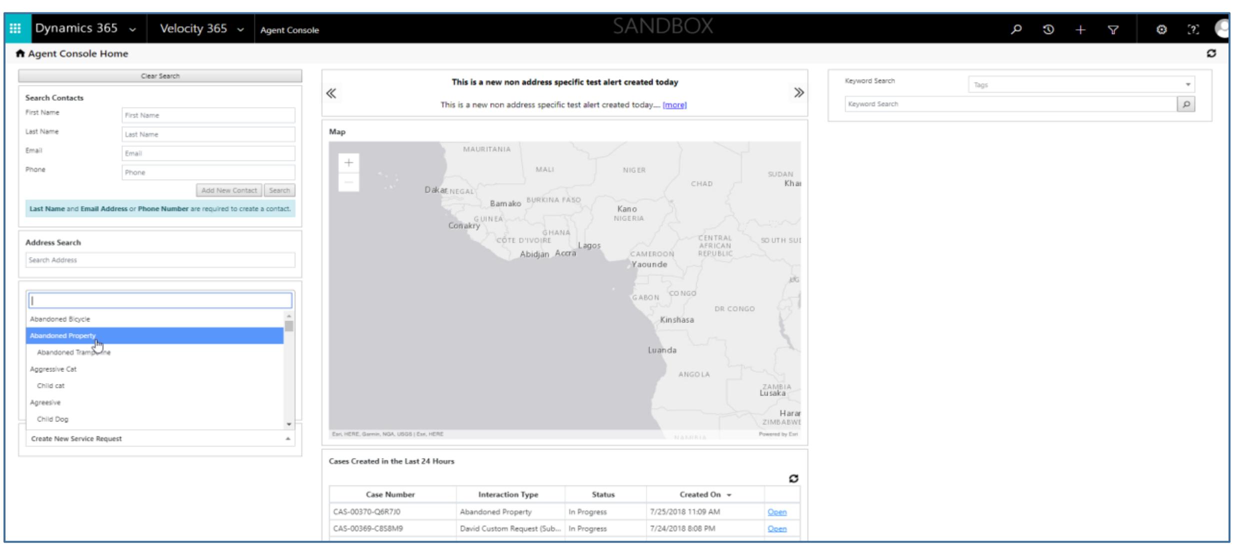
To create a new service request for a citizen, once you have the contact record displayed on the Agent Console screen as shown, click on the drop down list ***Create Service Request for Contact*** and select the required service request type.



The 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.

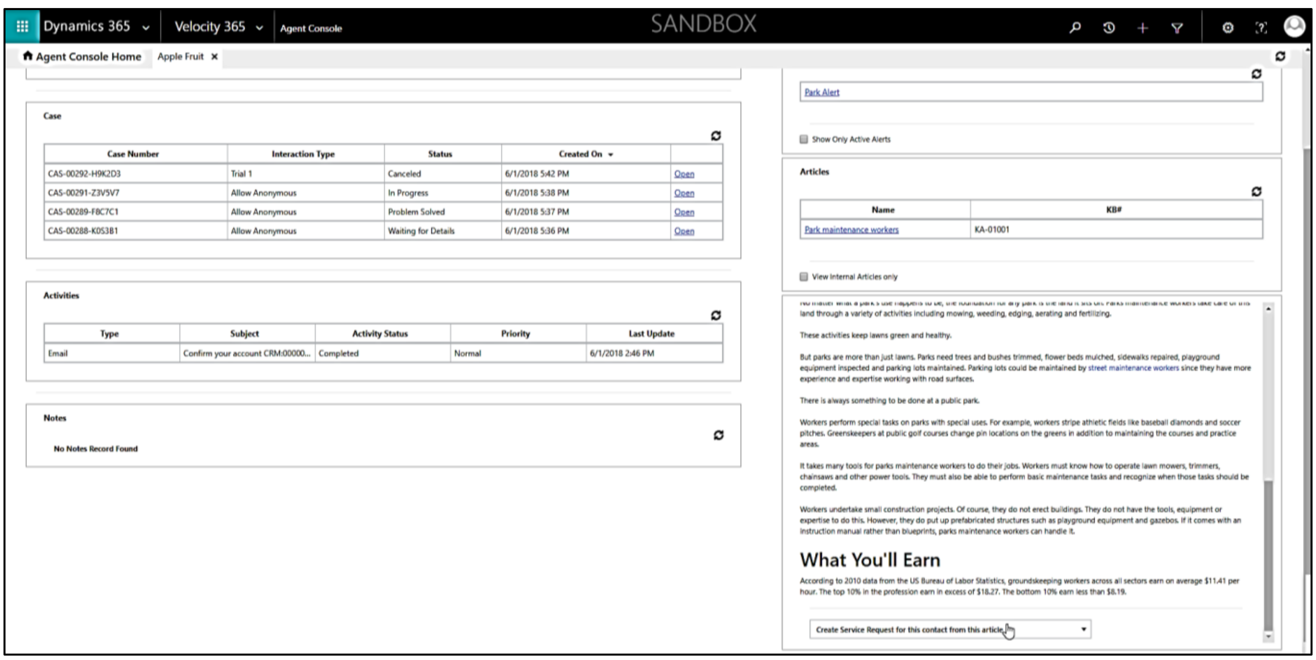


A Dynamics 365 form is opened and you can enter all the contact and location details.

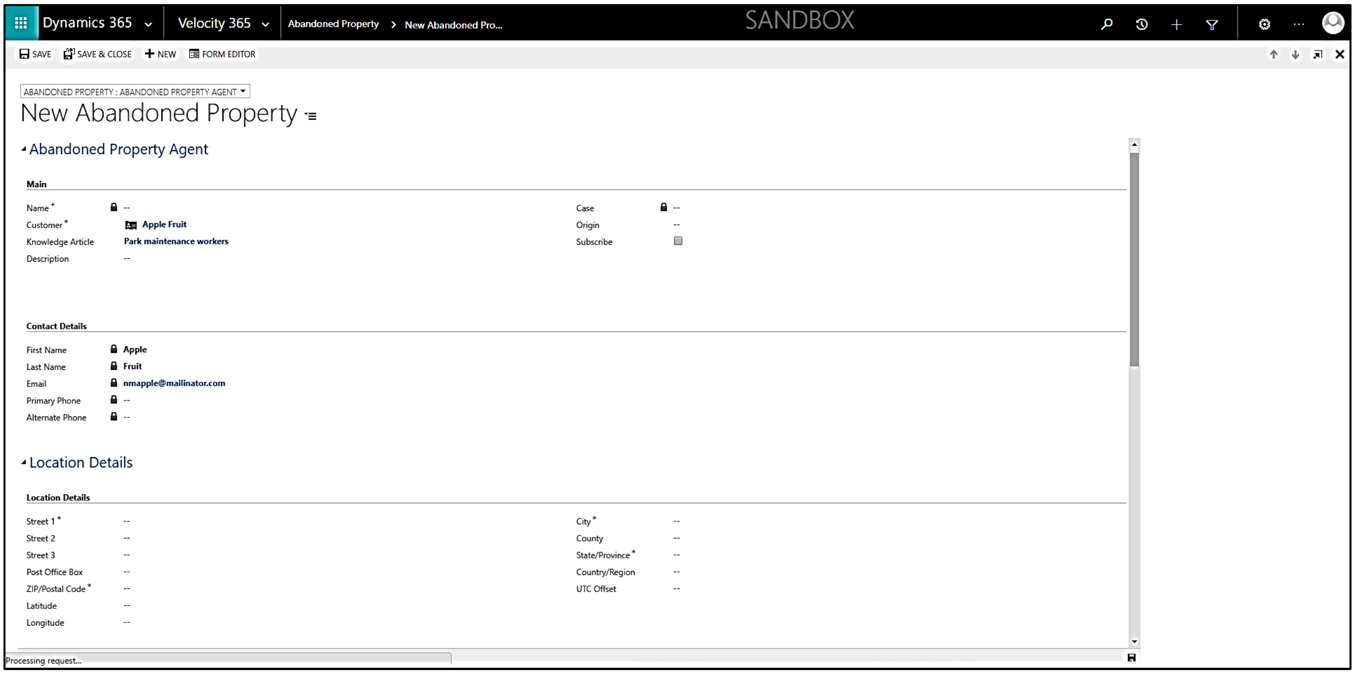
> Tip: To subscribe a citizen (other than the contact associated with a service request) to a specific service request, you must first create the service request. Once the service request is created, you can either open it to add the subscriber, or you can open the contact and subscribe them to the specific 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 new case record is displayed with the Contact information pre-populated and the knowledge base article already linked to the case as shown.

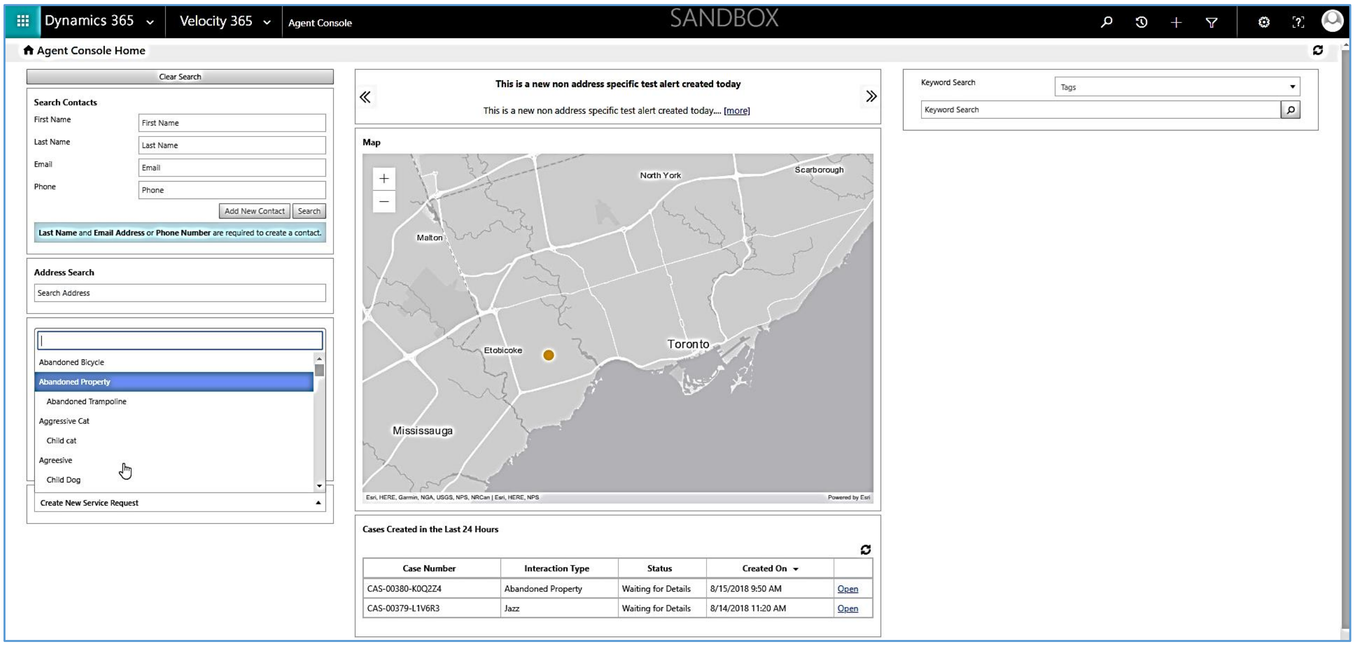


Once you complete the remaining location details for the specific service request, you can save the record.

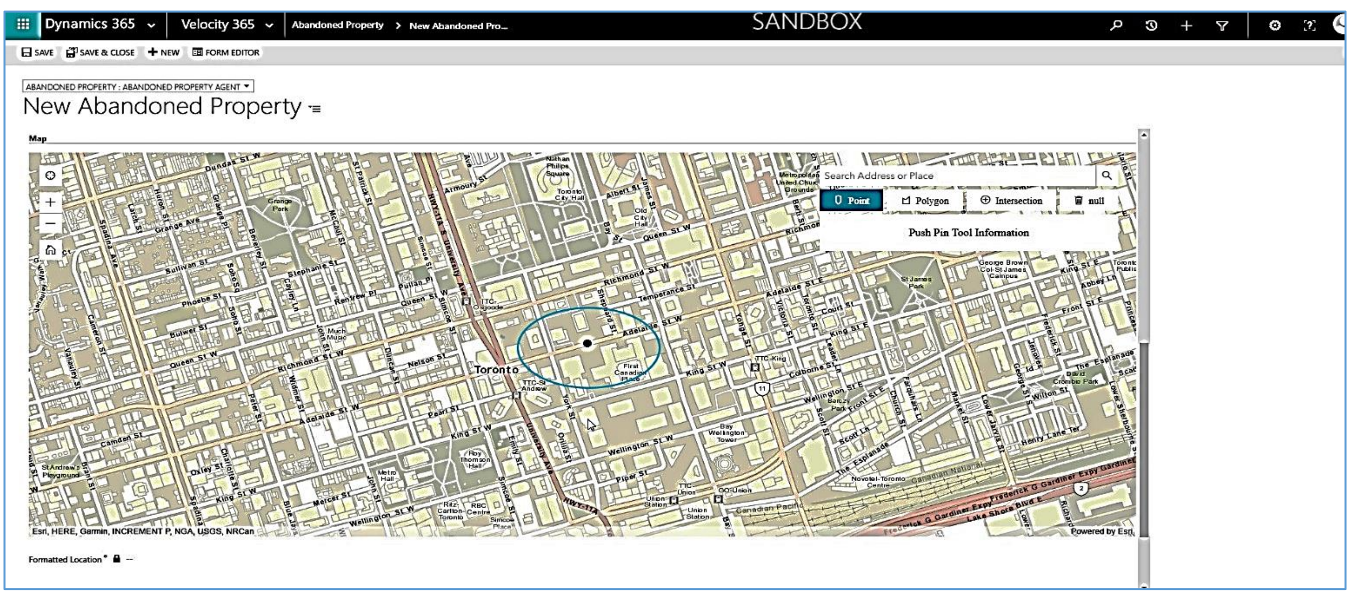
Tip: You can manually fill in the location of the issue, or alternatively use the map to identify the specific location, polygon or intersection.

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.

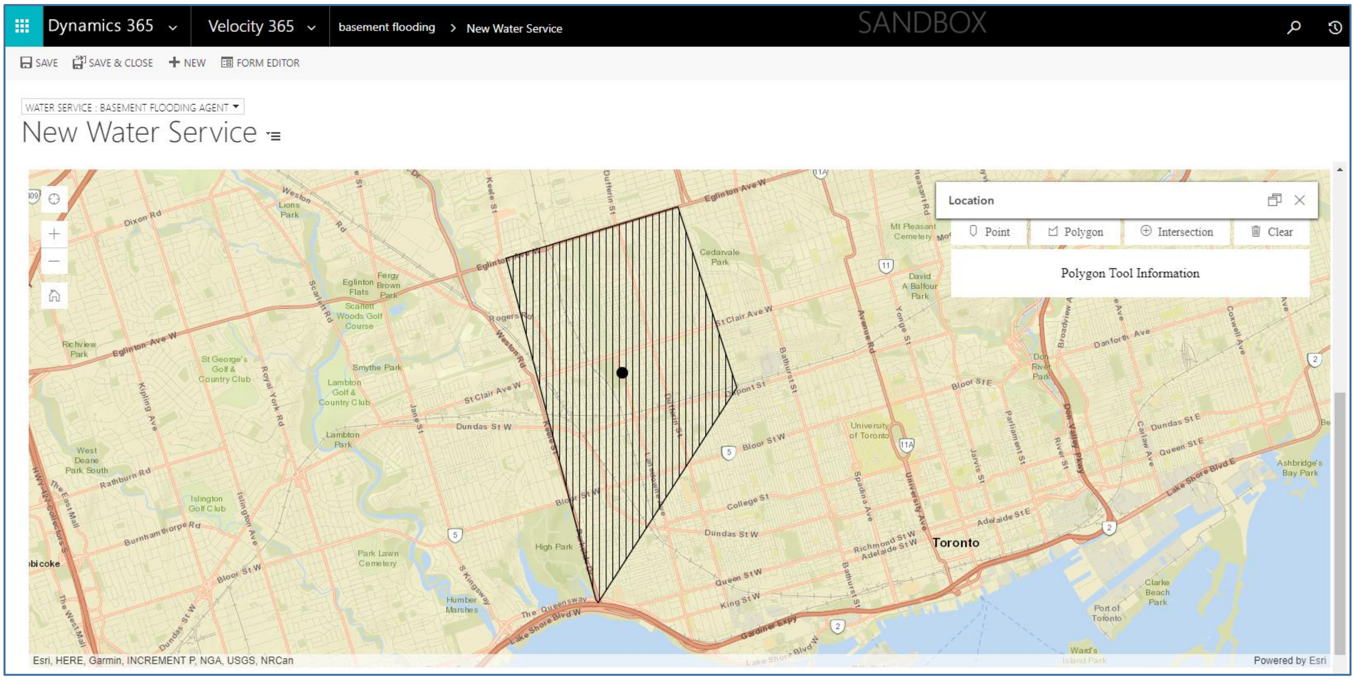


Once you select the desired service request type, the new service request form is presented. Scroll down to the map area and you can select either a point, polygon, or intersection to identify the location of the service request on the map. The screen shot below demonstrates the use of a single point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



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.

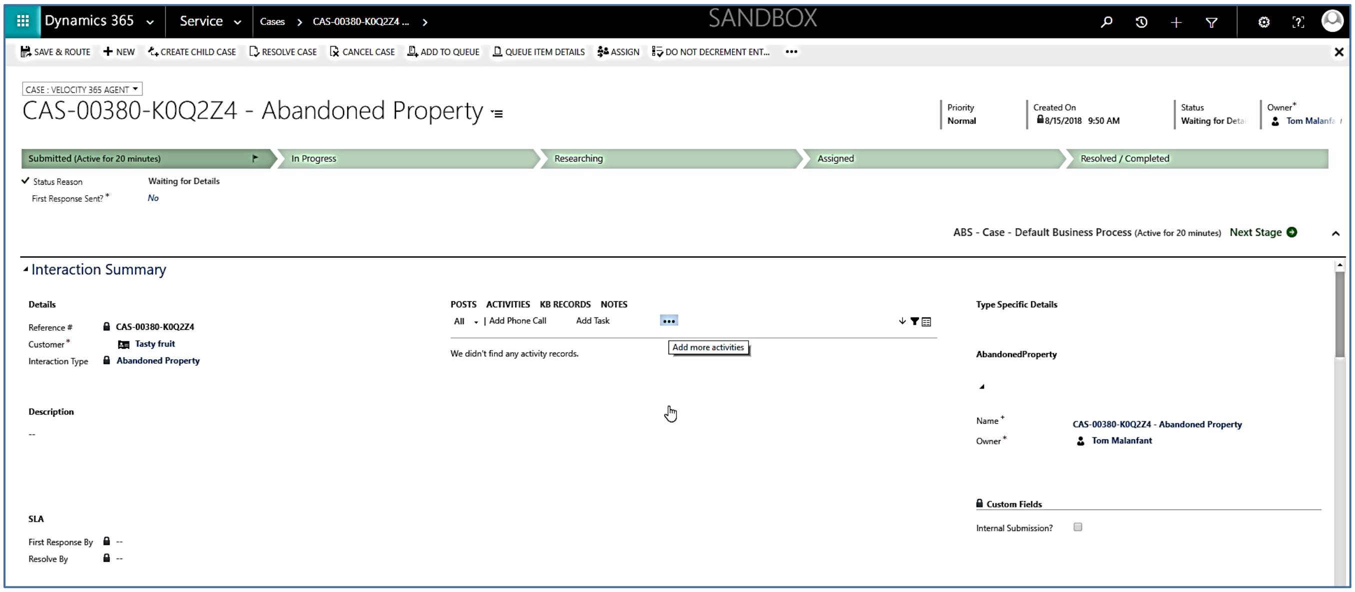


Updating the location on a Service Request

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

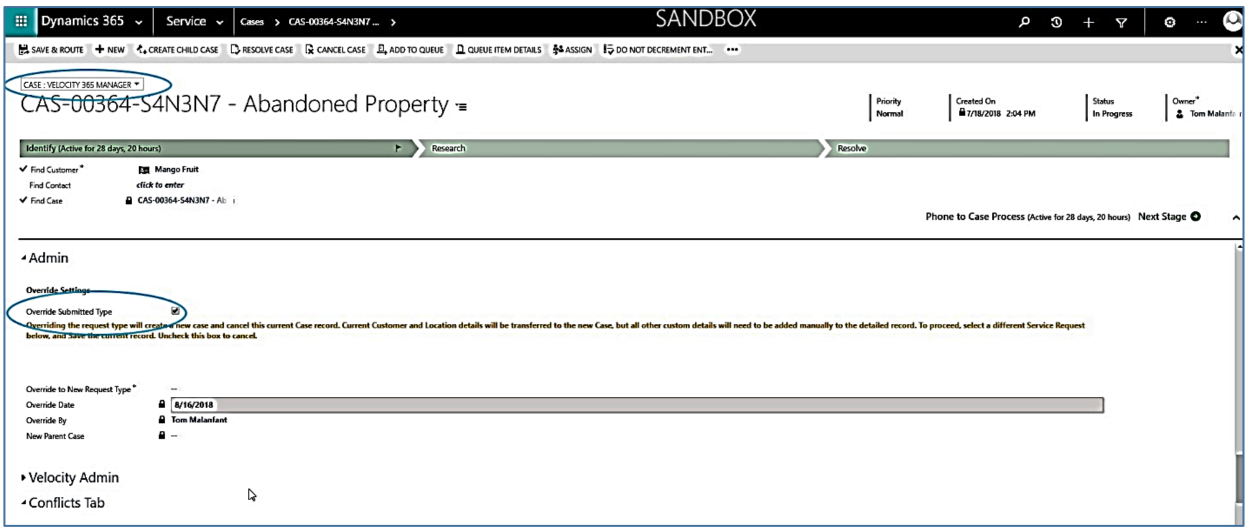
To add an activity to an existing service request, you open the specific service request in Microsoft Dynamics CRM and click on the ***Activities*** tab in the center pane. From there you can add a phone call, email, or task.



Changing the Service Request Type

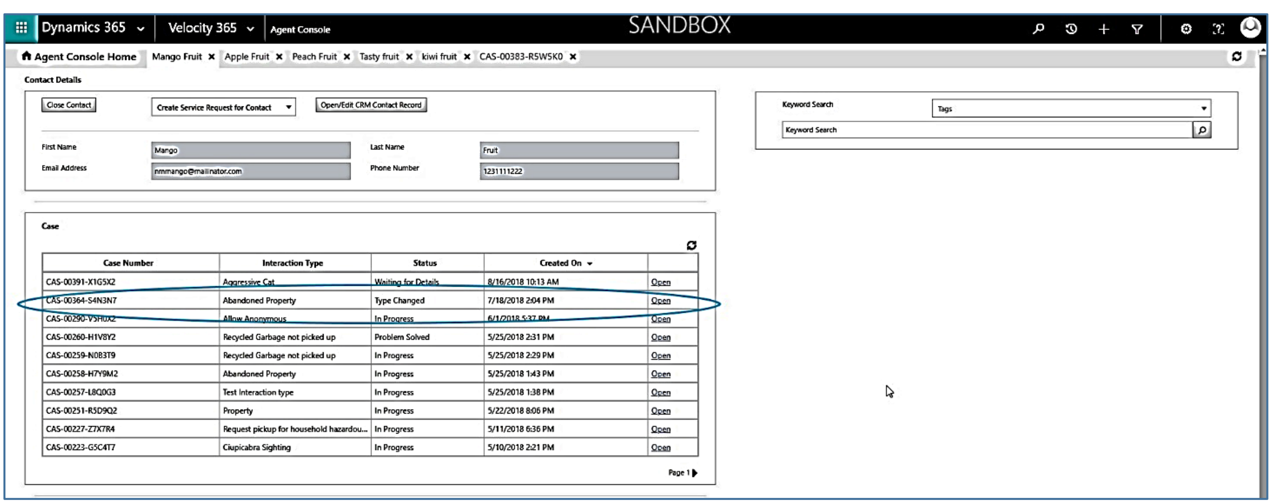
In order to change the service request type, you need to be in the "Velocity 365 Manager" view of the case form within Dynamics 365. Open the case record and navigate to the Admin section of the Case form. Once here, you select the checkbox "Override submitted type" and the system will display a warning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



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.



Subscriber Management

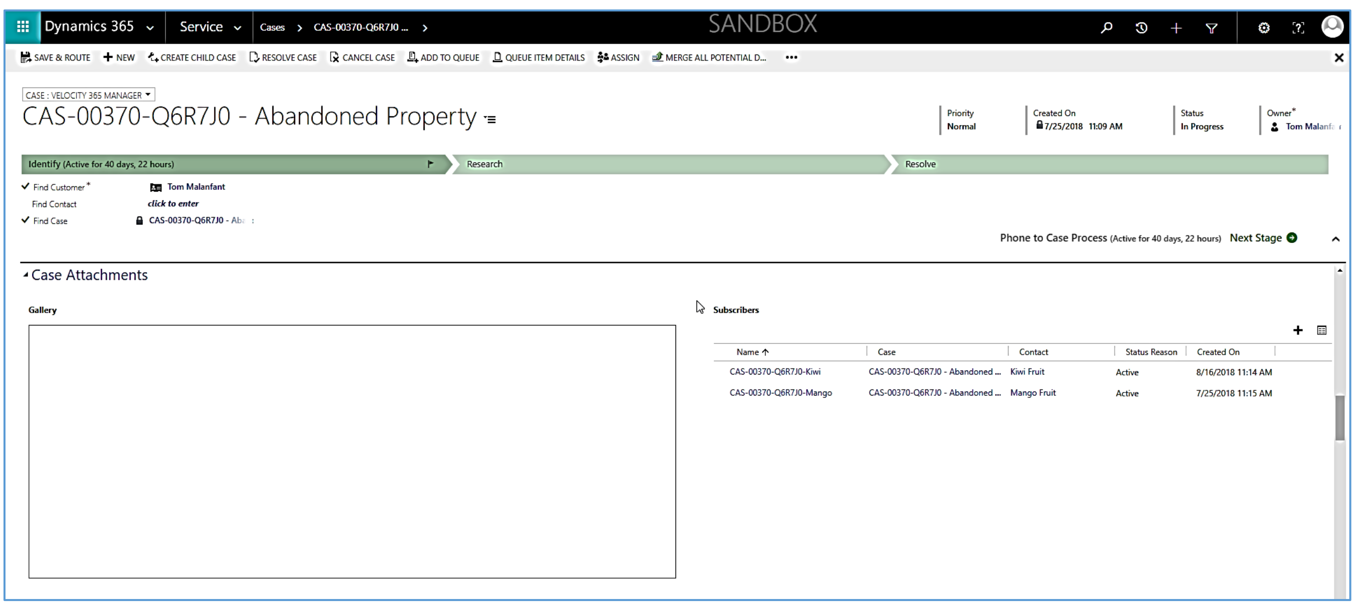
What is a subscriber?

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.

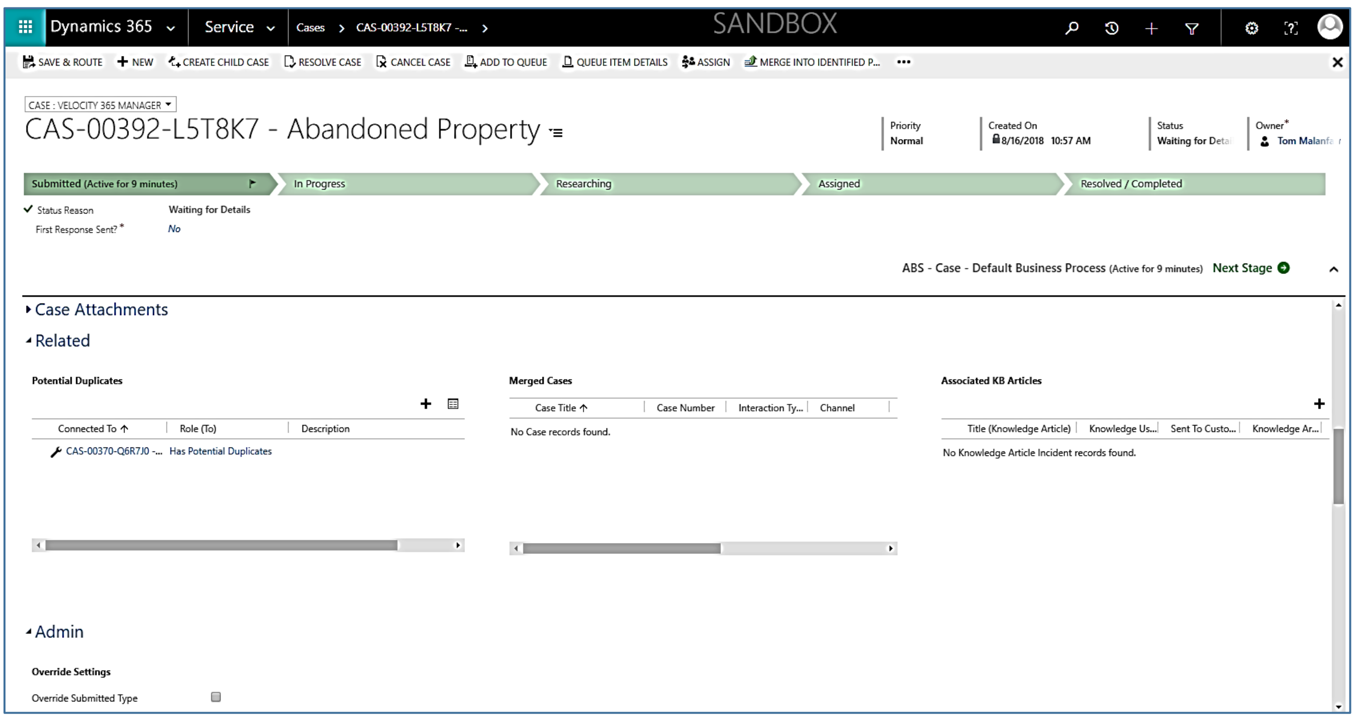


Managing Duplicates

How to detect potential duplicate service requests

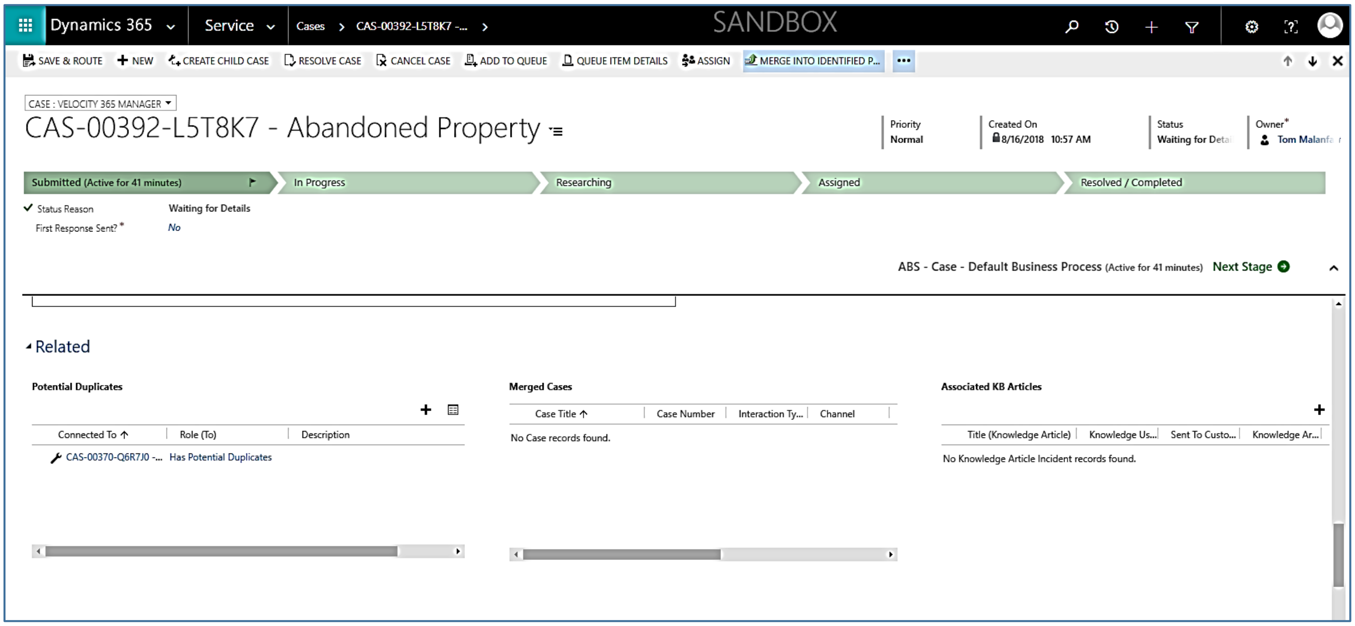
When a call center agent creates a new service request, a background duplicate detection process is initiated and any potential duplicates are identified within Dynamics CRM. These are not readily visible to the Agent when taking the information as you always want to record each call, then identify potential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

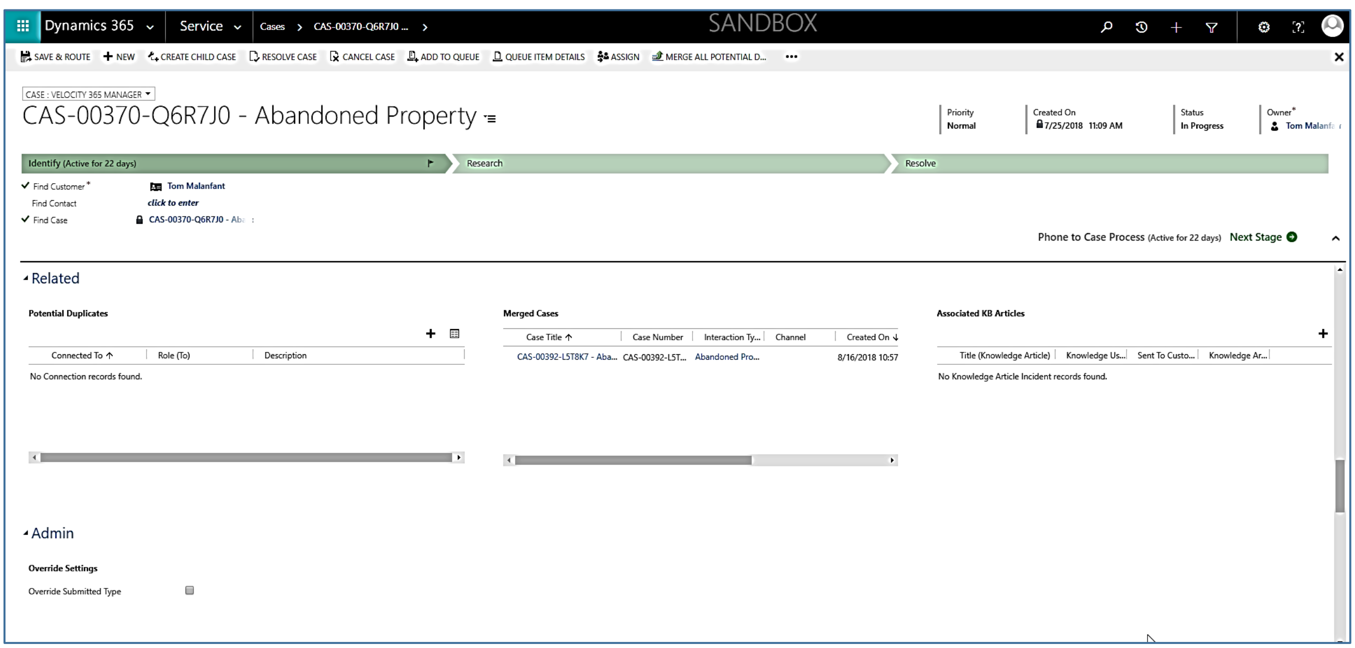


Merging a potential duplicate into Identified Parent Case

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.

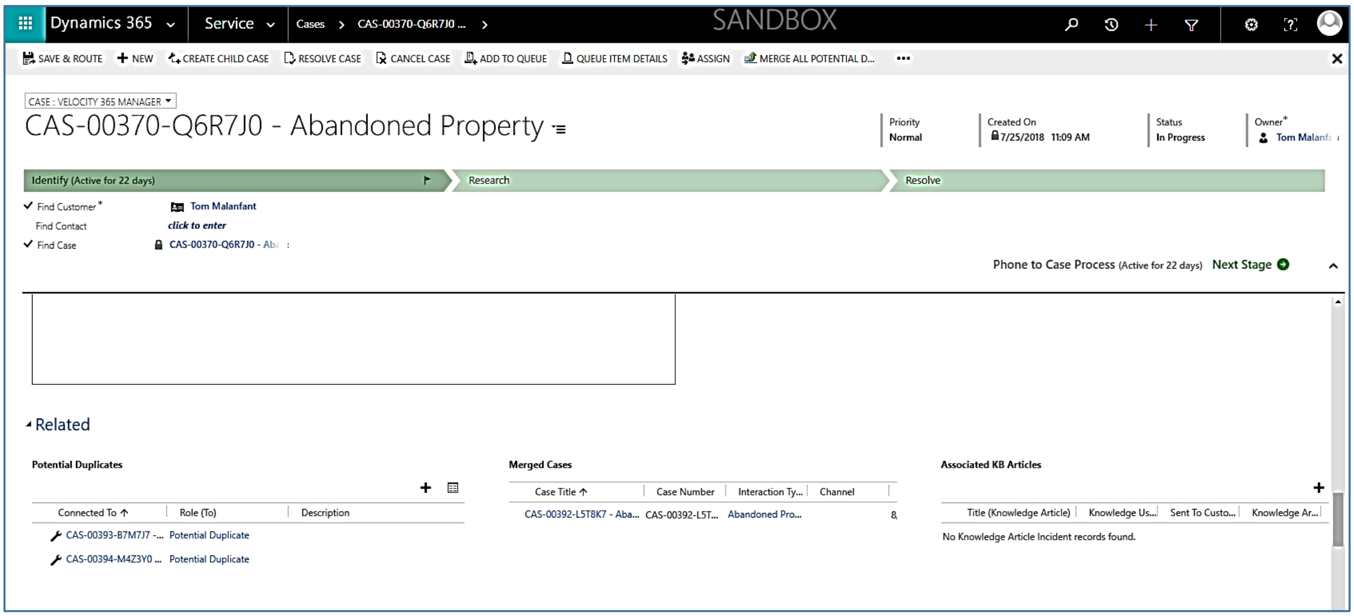


Now when you go and open the Parent case in Dynamics CRM and scroll down to the “Related” section of the case form, the child case shows as a Merged Case into the Parent.

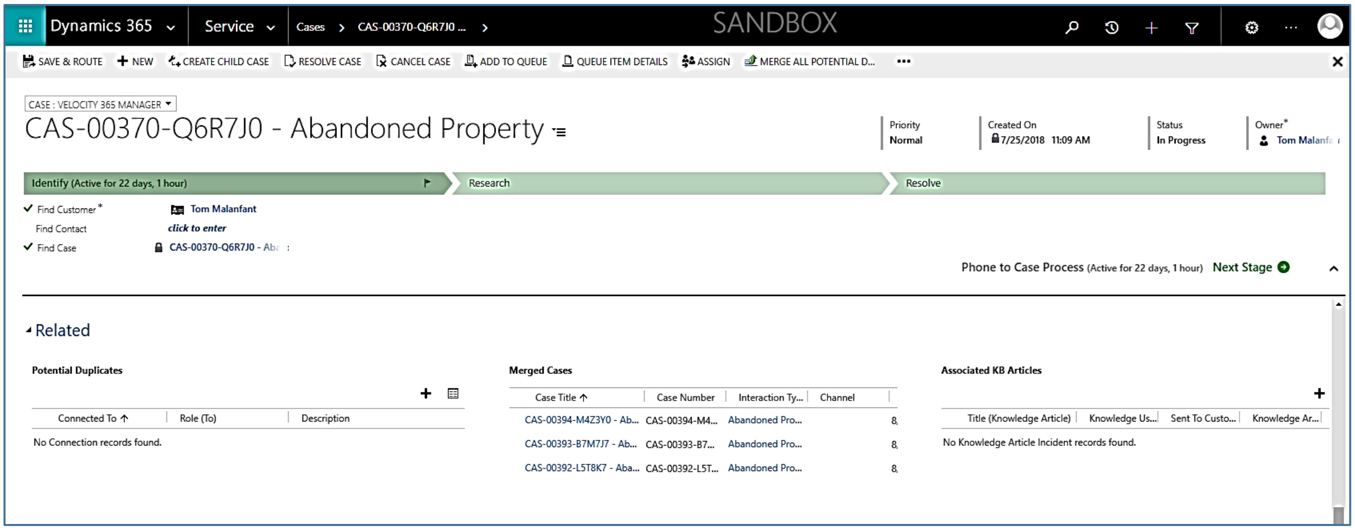


Merging potential duplicate child cases from a parent case

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.



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”.



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.