



**CRM/311 UPGRADE-  
DEPARTMENT LIAISON TRAINING**  
October 2016

# WHAT TO EXPECT

- **Minimal change in process** –Existing processes will remain largely intact, but the platform will provide new opportunities moving forward.
- **Biggest Challenge:** Learning the functionality within your new workspace, navigation and where things are at.
- **Browser:** Use Internet Explorer Browser 
- **Open Cases:** Cases that are still open in the old system on the date of the upgrade will still need to be completed and closed in the *old* CRM system.



# WHAT IS CRM?

- **Citizen Relationship Management (CRM)** is the City of Albuquerque's software application system where Service Requests are created or Frequently Asked Questions are answered based on a citizen's inquiry or call through 311.
- **Service Request Cases** can be created through **See Click Fix** or through a citizen phone call to **311**.
- **Service Request notifications** are routed to **Department Provider Groups (COA Department/Divisions)** to login to the CRM/311 system for review, processing and resolution.



# CITIZEN CALL CENTER

## What is the Citizen Contact Center (CCC)?

The CCC is the City of Albuquerque's Call Center where Agents answer **Frequently Asked Questions (FAQ's)** and create **Service Request Cases**.

The Agents at the citizen call center will work to answer and resolve as many issues through the citizen phone call, however, many calls must still be resolved outside of the citizen call center. These calls generate **service request cases** which the CRM application transfers to the Department's **Provider Group** for a department liaison, to resolve, process, and close.



# YOUR ROLE

- You have been identified by your department to be the Department CRM/311 Case Liaison to receive, review and actively work to resolve and close CRM/311 tickets for your department.

A Citizen Calls 311 or goes online to SeeClickFix seeking information, or to report an issue such as graffiti or a missed trash pickup, etc.



The 311 Call Center Operator Takes the citizen call or a case is submitted through the online See Click Fix application. The Agent will ask a series of questions based on the topic and prompts within the CRM/311 system. The citizen responses will be recorded in the CRM/311 System, a Ticket is created, assigned and routed to you as the liaison for your department/division. You are notified that the ticket has been created by receiving an email in your Outlook work Email box.



# YOUR ROLE



You, as the CRM/311 Ticket Liaison shall:

- 1) **Receive an Email Notification of a new case assigned to your provider group**
- 2) **Login to the CRM/311 System to review the case and related information**
- 3) **Contact the appropriate employees in your department to resolve the ticket issue**
- 4) **Make appropriate internal notes within the CRM/311 system as to the actions you have taken to actively resolve the ticket**
- 5) **When the issue has been entirely resolved you will close the ticket and update the resolution information. Cases should not be closed until work has been complete. If your department uses CRM as well as another system to work cases, please close the case in your system and then the CRM system after the work has been complete.**

**Important! In the new system, citizens will receive email update notifications when a ticket is closed/resolved. You must never close a ticket unless you are sure that the issue has been resolved and the resolution is updated with the pertinent information.**



# SIGN IN-USING YOUR NETWORK ID AND PASSWORD – E12345 OR ABCISD

Sign In

https://cityadfs.cabq.gov/adfs/fs/idpinitiatedsignon.aspx

City Of Albuquerque

You are signed in.

● Sign in to one of the following sites:

CRM Service Cloud

Click the "Sign in" button to login to your CRM/311 Account

Sign in

● Sign out from all the sites that you have accessed.

○ Sign out from this site.

Sign Out

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# NEW WORKSPACE OVERVIEW

The screenshot displays the Oracle Service Cloud interface for a case titled "INCIDENT" in Albuquerque. The interface includes a top navigation bar with various tools like "Undo", "Save", "Print", and "Copy". Below this is a "Recent Items" sidebar on the left, a "Navigation" sidebar, and a "Quick Search" sidebar on the right. The main content area shows "Case Details" for a case with contact "Johnny Applesseed" and address "1234 Yellow Brick Rd.". A "CASE SUMMARY" section provides a quick overview of the case, including "Quick Code", "Case Type", "Category", "Speciality Type", "Priority", "Department/Division", "Call Type", "Provider Group", "Assigned", and "Status". A "CASE DETAILS" section shows the "First Level Escalation" history. Red callout boxes highlight key features: "Multiple tabs allow for you to have multiple cases, your Worklist and search tabs open at the same time!", "Quickly Reference Recently worked cases in your Recent Items Menu!", "Quickly find cases and related information you are looking for using the Quick Search Menu!", and "Geographical Information System (GIS) data based on the case address provides you with specific information including: Zoning, Jurisdiction Within Limits, Trash Pickup Day, Area Command, Beat, Council District, Code Enforcement Inspection Area, Park Area, Recycle route, Inspector Name and latitude and longitude."

**Multiple tabs** allow for you to have multiple cases, your Worklist and search tabs open at the same time!

Quickly Reference Recently worked cases in your **Recent Items** Menu!

Quickly find cases and related information you are looking for using the **Quick Search** Menu!

**Geographical Information System (GIS)** data based on the case address provides you with specific information including:  
**Zoning, Jurisdiction Within Limits, Trash Pickup Day, Area Command, Beat, Council District, Code Enforcement Inspection Area, Park Area, Recycle route, Inspector Name and latitude and longitude.**

# ASSIGN CASE TO YOURSELF

The screenshot displays the Oracle Service Cloud interface for the City of Albuquerque. The main window shows an incident case for 'Johnny Appleseed' with a status of 'Closed'. The interface includes a navigation pane on the left, a top toolbar, and a right-hand search panel. Two callout boxes provide instructions: one pointing to the 'Notes' tab (labeled '2') and another pointing to the 'Assign' button (labeled '1').

**2** To add notes about the case, click the "notes" tab.

**1** Click the "assign" button if you will be responsible for the case. When you click assign, your name will populate in the "Assigned Field" and the case will no longer be in your provider group's worklists.

Field	Value
First Name	Johnny
Last Name	Appleseed
Phone Number	(###) ###-####
Address Type	Residential/Commercial
Address Line 1	6316 FLOR DE MAYO PL NW
City	Albuquerque
State	New Mexico
Postal/Zip Code	87120
Zoning	Residential
Jurisdiction	City of Albuquerque
Within Limits	In Jurisdiction
Trash Pickup Day	Friday
Area Command	NORTHWEST
Beat	628
Council District	1
Code Enforce Insp Area	3
Park Area	6
Recycle Route	RC07F
Inspector Name	Sandy Handley
Latitude	35.149378482098804
Longitude	-106.71360390946664

Field	Value
Quick Code	DMD - Parking
Case Type	Service Request
Category	MD-Parking
Speciality Type	Parking Issues
Detail	Administrative Issue
Priority	Medium
Department/Division	Municipal Development
Call Type	N/A
Provider Group	DMD-Parking CLR
Assigned	[No Value]
Status *	Closed
Source	Phone

Field	Value
First Level Escalation	06/20/2016 03:36 PM
Second Level Escalation	07/04/2016 03:3 PM

# ADD CASE NOTES

160606-000183

## CITY OF ALBUQUERQUE INCIDENT

Case Details | Notes | Map | Associated Requests | Attachments | Audit Log

Send On Save | Add | SmartAssistant | Search Knowledgebase | Standard Text | Options

Customer Entry  
Response  
Private Note

Auto Note | No Channel | Administrator, 06/09/2016 12:00 AM  
Resolution:  
Auto Note | No Channel | Administrator, 06/06/2016 03:36 PM  
Summary: test

1

2

3

4

Add your case notes here in the notes space.

Click the "Add" button to add a note. You have two options:

- 1) Customer Note - this gets delivered to the citizen contact (**external**) upon saving the note.
- 2) Private Note - This is an internal note that does not get sent to the citizen contact (**internal**)

Once you have entered your note, check the "Send on Save" box and click the "Save" button.

Quick Search

Incident Search

Case #

Phone Number

Address Line 1

Address Line 2

Customer First Name

Customer Last Name

Date Created

No Value

Relative

No Value

Relative

Status

Closed, Open\_New

Provider Group

All

Search Clear

Navigation

Home

- System Configuration
  - Accounts and Profile
  - Configuration
  - Reports
  - Worklist (default)
  - ThreadReports

# VIEW ADDRESS MAP

The screenshot displays the Oracle Service Cloud interface for the City of Albuquerque. The main window is titled "INCIDENT" and shows a map view of a specific address. The interface includes a navigation pane on the left, a central map area, and a search panel on the right. A callout box with a red arrow points to the "Map" tab, explaining that clicking it shows a map of the address and lists associated service requests.

**INCIDENT**

Case Details | Notes | **Map**

Return to Case Details Tab

Service Requests

No Open Incidents found for this address

Click on the "Map" tab to view a map of the address. If there are any other cases that are associated with this address, they would be listed under the "Service Requests" section. The balloon on the map indicates the location of the address for the case.

Quick Search

Incident Search

Case #

Phone Number

Address Line 1

Address Line 2

Customer First Name

Customer Last Name

Date Created

No Value to

Relative

No Value to

Relative

Status

Closed, Open, New

Provider Group

All

Search Clear

City of Albuquerque Bureau of Land Management Esri HERE DeLor

Logged in as Amber Terrasas Editing 3 objects (1 modified)

# ADD ATTACHMENTS

The screenshot displays the Oracle Service Cloud interface for the City of Albuquerque Incident Management System. The main window is titled "INCIDENT" and shows a tabbed interface with "Case Details", "Notes", "Map", and "Attachments". The "Attachments" tab is selected, and the "Add Files" button is highlighted with a red arrow. A text box with a black border and white background contains the following text: "Click on the 'Attachments' tab and then 'Add Files' button to add pertinent photos, documents, etc. You should save the files you want to attach in a location/folder on your computer ahead of this step." The interface also includes a "Recent Items" sidebar on the left, a "Quick Search" sidebar on the right, and a top navigation bar with various icons and a "Home" button. The bottom status bar indicates the user is logged in as Amber Terrasas and is editing 3 objects (1 modified).

City of ALBUQUERQUE

INCIDENT

Case Details | Notes | Map | Attachments

Add Files

Name | Size | Created | Updated | Action

There are no items to show in this view.

Quick Search

Incident Search

Case #

Phone Number

Address Line 1

Address Line 2

Customer First Name

Customer Last Name

Date Created

No Value to

Relative

No Value to

Relative

Status

Closed, Open, New

Provider Group

All

Search Clear

Logged in as: Amber Terrasas | Editing 3 objects (1 modified) | 100%

# AUDIT LOG –ACTIONS/DATES/TIMES

Click on the "Audit Log" tab to view all actions that have been taken on this specific case.

In this example, you will see a logged item "Message delivery to some recipients failed." This message appears because I entered a Customer Note, as you recall this is the note that gets sent to the customer when you save the case, however, on this particular case, the contact was "Anonymous," and there was no email address associated, therefore, the message failed to send.

When	Who	What	Description
10/03/2016 10:57 AM	Amber Terrasas	Changed Status	Open_New
10/03/2016 10:57 AM	Amber Terrasas	Failure	Message delivery to some recipients failed
10/03/2016 10:57 AM	Amber Terrasas	Changed Queue	APD - Abandoned Vehicle Clearinghouse
10/03/2016 10:57 AM	Amber Terrasas	Created	From Case Editor



# CASE DETAILS –LOWER TAB

**CITY OF ALBUQUERQUE INCIDENT**

**CONTACT DETAILS**

Contact: Anonymous Caller  
First Name: Anonymous  
Last Name: Caller  
Phone Number: (###) ###-####  
Email: [Redacted]

**ADDRESS DETAILS**

Address Type: Residential/Commercial  
Address Line 1: 1 CIVIC PLAZA NW  
Address Line 2: [Redacted]  
City: Albuquerque  
State: New Mexico  
Postal/Zip Code: 87102  
Zoning: Institutional / Government  
Jurisdiction: City of Albuquerque  
Within Limits: In Jurisdiction  
Trash Pickup Day: [No Value]  
Area Command: VALLEY  
Beat: 225  
Council District: 2  
Code Enforce Insp Area: 8  
Park Area: 7  
Recycle Route: NA  
Inspector Name: Michael Milligan  
Latitude: 35.0875960003751  
Longitude: -106.6515788588902

**CASE SUMMARY**

Summary: Abandoned.  
Quick Code: Abandoned Vehicle  
Department/Division: Police  
Call Type: APD  
Category: APD  
Provider Group: APD - Abandoned Vehicle Clearinghouse  
Speciality Type: General  
Status: Open\_New  
Priority: Medium  
Source: Phone

**CASE DETAILS**

First Level Escalation: 10/26/2016 10:51 AM  
Second Level Escalation: 11/02/2016 10:51 AM  
Description: [Redacted]  
Resolution: [Redacted]

Wrong Division

**Quick Search**

Incident Search: [Redacted]  
Case #: [Redacted]  
Phone Number: [Redacted]  
Address Line 1: [Redacted]  
Address Line 2: [Redacted]  
Customer First Name: [Redacted]  
Customer Last Name: [Redacted]  
Date Created: No Value to [Redacted]  
Relative: [Redacted]  
Status: Closed, Open, New  
Provider Group: All

**In the Case Details section, you will see:**

- 1) **Escalation dates** -these are the dates that the case will be escalated to the next supervisory tier if no action has been taken on it
- 2) **Description** - Case Description Information
- 3) **Resolution**- When closing a case, it is required that you fill out the **Resolution** field with details of how the case was resolved
- 4) **Wrong Division**- If you know that this case is not for your department, you will click the **Wrong Division** box. This will send the case back to the Citizen Call Center for correct routing and assignment of the case

# USER DEFINED FIELDS-CASE INFORMATION

The screenshot displays the Oracle Service Cloud interface for the City of Albuquerque. The main window is titled "INCIDENT" and shows details for case 161003-00023. The interface is divided into several sections:

- CONTACT DETAILS:** Contact: Anonymous Caller, First Name: Anonymous, Last Name: Caller, Phone Number: (###) ###-####, Email: [Redacted].
- ADDRESS DETAILS:** Address Type: Residential/Commercial, Address Line 1: 1 CIVIC PLAZA NW, City: Albuquerque, State: New Mexico, Postal/Zip Code: 87102, Zoning: Institutional / Government, Jurisdiction: City of Albuquerque, Within Limits: In Jurisdiction, Trash Pickup Day: [No Value], Area Command: VALLEY, Beat: 225, Council District: 2, Code Enforce Insp Area: 8, Park Area: 7, Recycle Route: NA, Inspector Name: Michael Milligan, Latitude: 35.0875960003751, Longitude: -106.6515788858902.
- CASE SUMMARY:** Summary: Abandoned, Quick Code: Abandoned Vehicle, Department/Division: Police, Case Type: Service Request, Call Type: APD, Category: APD, Provider Group: APD - Abandoned Vehicle Clearinghouse, Speciality Type: General, Status: Assigned, Detail: None, Priority: Medium, Source: Phone.
- USER DEFINED FIELDS:** A table with columns for field name and value. Fields include: Vehicle Might be Stolen (No), # days there, Public/Private Property, License Plate #, and State.

A red box highlights the "USER DEFINED FIELDS" section, and a white callout box with a red arrow points to the "User Defined Fields" tab at the bottom of the interface. The callout box contains the text: "Click on the 'User Defined Fields' tab to view information related to the case that was entered when the call was taken."

At the bottom of the interface, there are tabs for "Case Details", "User Defined Fields", and "GIS Attributes". The "User Defined Fields" tab is currently selected.

# GIS ATTRIBUTES

The screenshot displays the Oracle Service Cloud interface for the City of Albuquerque Incident Management System. The main window is titled "INCIDENT" and contains several sections:

- CONTACT DETAILS:** Includes fields for Contact (Anonymous Caller), First Name (Anonymous), Last Name (Caller), Phone Number, and Email.
- ADDRESS DETAILS:** Includes fields for Address Type (Residential/Commercial), Address Line 1 (1 CIVIC PLAZA NW), Address Line 2, City (Albuquerque), State (New Mexico), Postal/Zip Code (87102), Zoning (Institutional / Government), Jurisdiction (City of Albuquerque), Within Limits (In Jurisdiction), Trash Pickup Day ([No Value]), Area Command (VALLEY), Beat (225), Council District (2), Code Enforce Insp Area (8), Park Area (7), Recycle Route (NA), Inspector Name (Michael Milligan), Latitude (35.0875960003751), and Longitude (-106.6515788858902).
- CASE SUMMARY:** Includes fields for Summary (Abandoned), Quick Code (Abandoned Vehicle), Department/Division (Police), Call Type (APD), Category (APD), Provider Group (APD - Abandoned Vehicle Clearinghouse), Speciality Type (General), Detail (None), Priority (Medium), Status (Assigned), and Source (Phone).
- GIS ATTRIBUTES (highlighted):** A table of location-related data:

Assc Name	NOTIFY DOWNTOWN LIST	Councilor Name	Isaac Benton
COA Beat	225	CPA Name	CENTRAL ABQ
Elementary School	LEW WALLACE	Council District	2
Mid School	WASHINGTON	High School	ALBUQUERQUE
RA	NA	Page	J-14
RC	NA	RA Day	NA
Shape	-11872399.453875811, 4175786.5194625514	RC Day	NA
Quadrant	NW	Sector	22
Last Modified Date	10/03/2016 10:57 AM	Zone Map	J14

A red box highlights the "GIS Attributes" tab, and a callout box points to it with the text: "Click on the 'GIS Attributes' tab to view additional address information based on GIS data."

# CLOSING A CASE

The screenshot displays the Oracle Service Cloud interface for the City of Albuquerque. The main window shows an incident summary for 'Abandoned Vehicle' with the following details:

- CONTACT DETAILS:** Contact: Anonymous Caller, First Name: Anonymous, Last Name: Caller, Phone Number: (###) ###-####, Email: [Redacted]
- ADDRESS DETAILS:** Address Type: Residential/Commercial, Address Line 1: 1 CIVIC PLAZA NW, City: Albuquerque, State: New Mexico, Postal/Zip Code: 87102, Zoning: Institutional / Government, Jurisdiction: City of Albuquerque, Within Limits: In Jurisdiction, Trash Pickup Day: [No Value], Area Command: VALLEY, Beat: 225, Council District: 2, Code Enforce Insp Area: 8, Park Area: 7, Recycle Route: NA, Inspector Name: Michael Milligan, Latitude: 35.08755960003751, Longitude: -106.65157888588902
- CASE SUMMARY:** Summary: Abandoned, Quick Code: Abandoned Vehicle, Department/Division: Police, Case Type: Service Request, Call Type: APD, Category: APD, Provider Group: APD - Abandoned Vehicle Clearinghouse, Assigned: [No Value], Status: Open\_New, Source: Phone, Priority: Medium

The 'CASE DETAILS' window is open, showing the following information:

- First Level Escalation: 10/26/2016 10:51 AM
- Second Level Escalation: 11/02/2016 10:51 AM
- Description: [Redacted]
- Resolution: [Redacted]

A text box provides the following instructions for closing a case:

- 1) Click on the Case Details Tab if you are not already there
- 2) Enter resolution information into the Resolution field (Required)
- 3) Change the **Status** to close from the drop down menu
- 4) Click Save - when you click save, an email will be sent to the citizen contact with the resolution information you typed in and the closure status

**\*Do NOT close a case in the CRM/311 system until the issue has been resolved. If you work the case in your own department system, complete the work, close the case in your system and then close the case in the CRM/311 system**

# TRAINING QUESTIONS

- For training questions or to report any issues you may encounter in the application please contact:
  - Amber Terrasas at [aterrasas@cabq.gov](mailto:aterrasas@cabq.gov) 505-768-3723
- If you need or would like more training on the application, please contact me and we can schedule an online meeting time.
- Thank you for your time!



