A Division of WebQA

2014

GET STARTED GUIDE

The Admin Guide For Your CRM System

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Welcome to GovQA. We hope our guide answers all your questions and serves as a valuable resource as you get started with your CRM system.

This document contains the basic information necessary for admin users to effectively set up the configuration of the system. Please remember, every system is custom and built to the clients' specifications. This guide will serve as a basic reference but might not look exactly like your system. If at any time you are uncertain of the information, please feel free to contact our Customer Support Team by visiting www.supportqa.com.

Training videos are also available on your site. You can access them by Clicking "Help" and selecting "Online Training Videos."

Thanks again and we look forward to working with you.

Getting Started

Logging in to the System

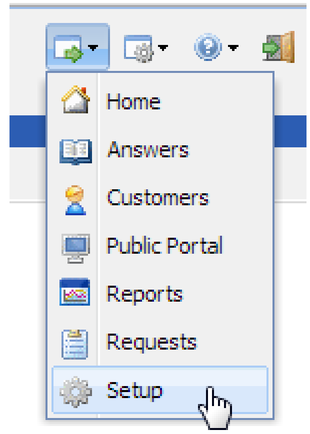
Use the link provided to you to access the Administrator Portal.

The login screen will be presented to you. We recommend adding the site your favorites for quick access in the future. Enter the Login ID and password and Select "Login". Your login is typically your first initial followed by your last name, for both the login ID and password.

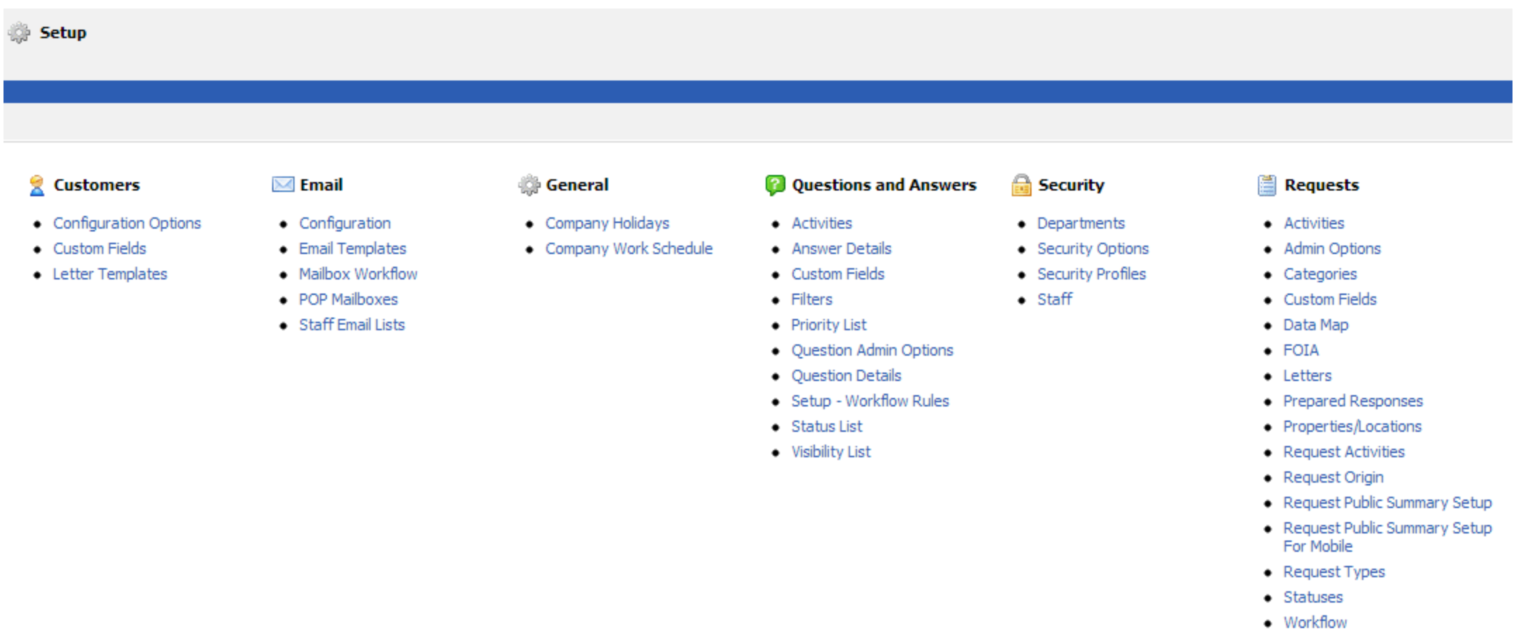
Accessing the Setup

General Layout of the Setup Page

1. To access the setup page, click on the Go To button (first button on the top right corner of your screen).



From this page you will be able to manage your system (e.g. edit email templates and custom fields, add holidays and additional staff, etc.).

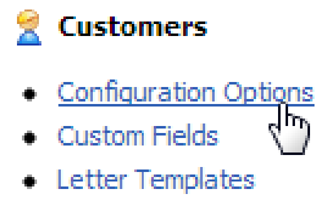


Customer Fields/Customer Configuration

You will be able to manage what kind of information you are collecting from your customers (first name, last name, address, etc.) when they are filling out an account on the portal or when you need to gather information from them in person.

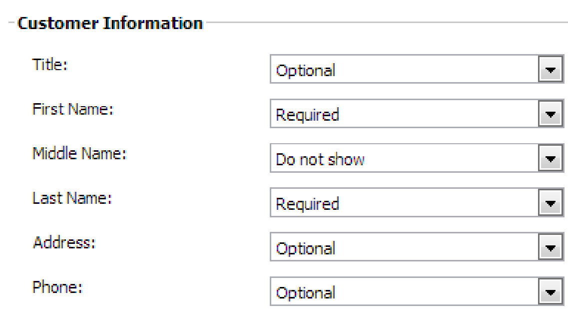
Customer Information

1. From setup: Find the "Customers" section
2. Select: "Configuration Options"

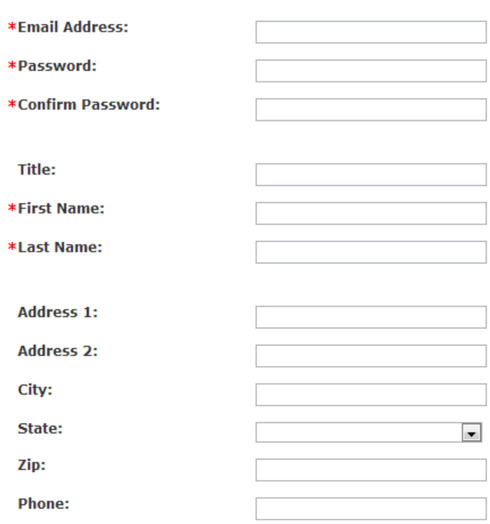


When a customer first registers on the portal, at the very least they will need to provide an e-mail address and password. We can also collect additional information from them like their first name, last name, phone number, etc. These fields can be **required** (the system will not allow the customer to move forward until they have filled out those fields) or **optional** (it will be up to the customer if they want to include that information).

Under "Customer Information," you will select which fields will be required, optional, or will not be displayed at all. You will have available title, first name, middle name, last name, address, and phone. Simply click on the dropdown and change it to optional, required, or do not show. After you have made the appropriate changes, Click "Save".



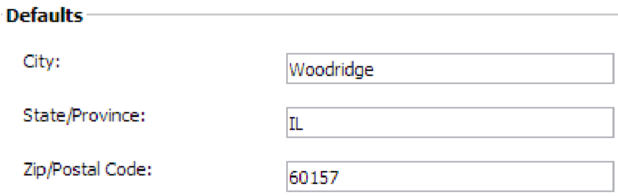
This is an example of how it would show for the customer on the portal as they are first registering.



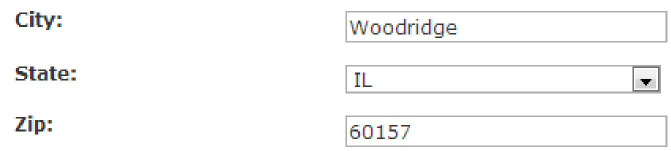
Defaults

If you would like to have the City, State/Province, and/or Zip/Postal Code fields automatically populate with a value, you would add them under the "Defaults" section. These values would automatically appear for the customer when they are registering on the portal or when a staff member is creating an account for them in the system – the customer/staff will have the ability to delete the value and add the appropriate one. After you have added/edited the values, Click "Save."

Staff Side of the System



Customer Side of the System



General Information
Company Holidays

To edit the holiday schedule for the current and future calendar years, go to the Setup page within the system.

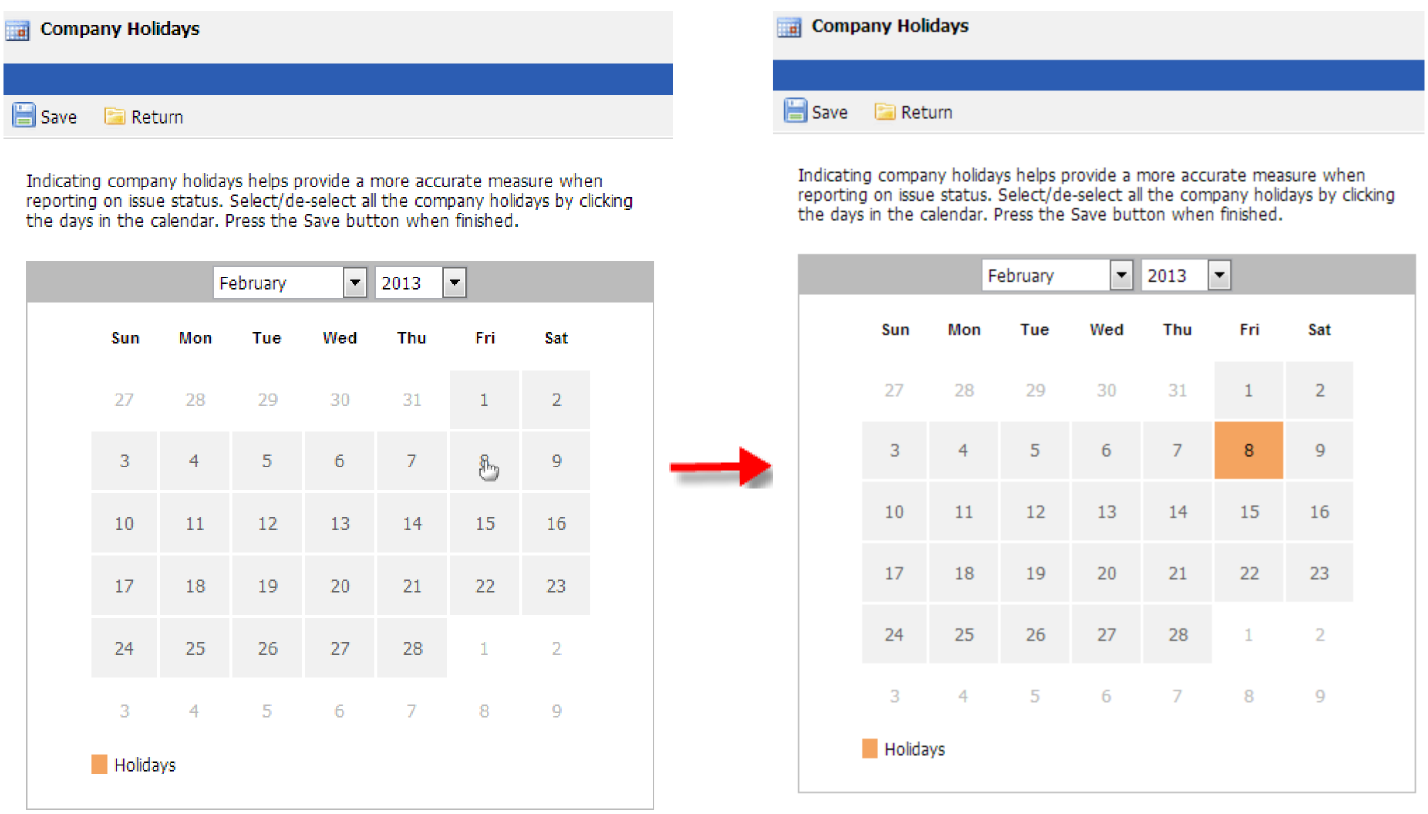
1. From Setup: Find the "General" section
2. You'll be presented two choices: Select "Company Holidays"

3. The system will now display a calendar with the current month

Go through each month and select what days the City recognizes as holidays so that the system does not count that day against you when handling time sensitive material.

To select specific days:

Hover over each day that is a holiday. A little pointer finger will appear. Select the day. When the day has been set as a holiday, it will now appear red. Go through every month and select all holidays.



Once all days are selected: Click "Save"

Company Work Schedule

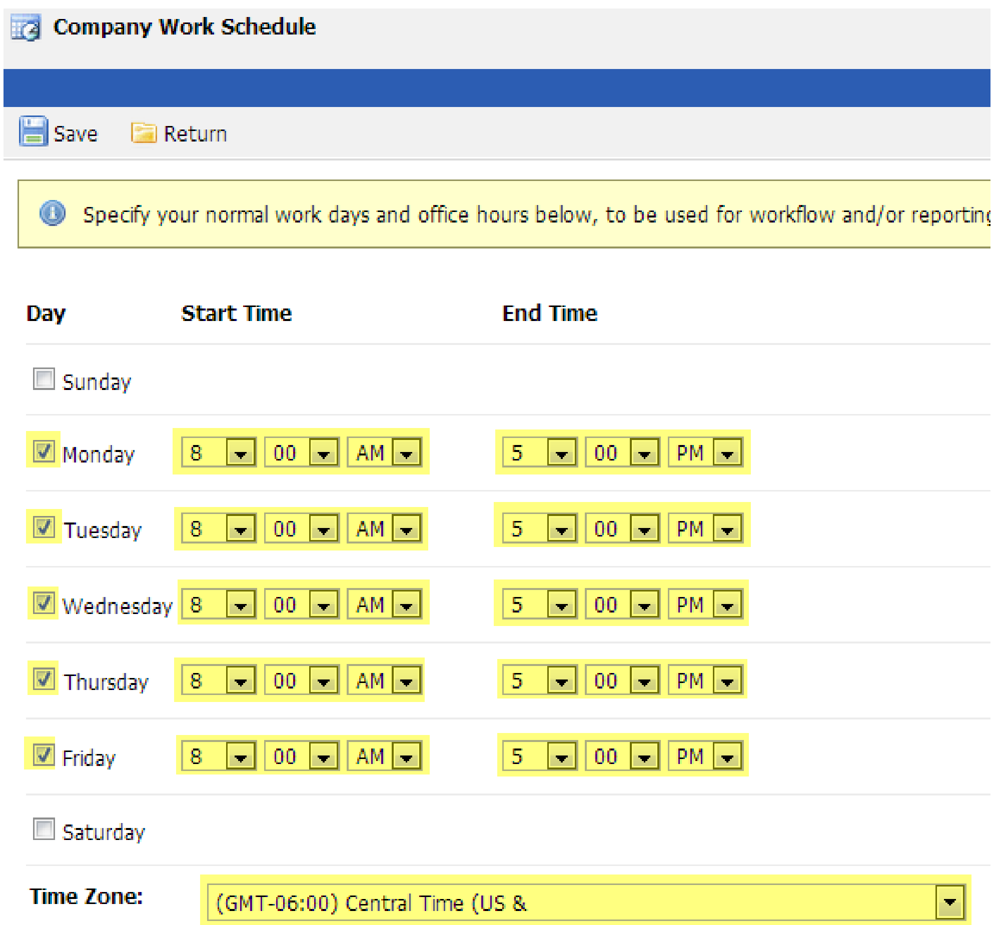
To edit the work schedule for your City, go to the setup page within the system.

1. From Setup: Find the "General" section

2. You'll be presented two choices: Select "Company Work Schedule"

3. The system will now display a check list of days and times

Setting specific days and time:
- Check the box next to each day that the City is open
- Set the corresponding business hours
- Select the correct time zone



Once all hours are set: Click "Save"

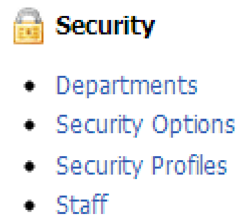
Security Settings – Staff Accounts

Editing/Deactivating an Existing User

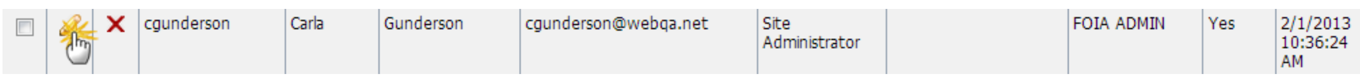
In certain situations you might be required to edit an existing staff member's account or even deactivate their account so they will not be able to login in to the system.

Editing:

1. To EDIT a still active staff members account: Find the "Security" section
2. You will be presented several choices: Select "Staff"
3. The system will now display a list of all staff members

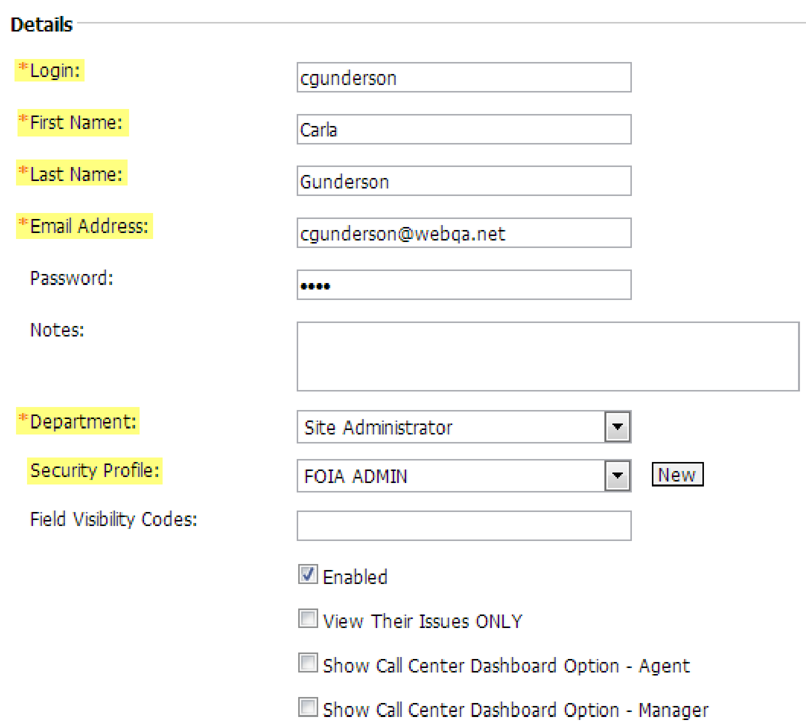


Find the staff member whose information you need to update. Select the pencil next to their name to edit.



Make any appropriate changes to the staff members account such as:

-Login
-First Name
-Last Name
-Email Address
-Department
-Security Profile



Once all edits are made: Click "Save"

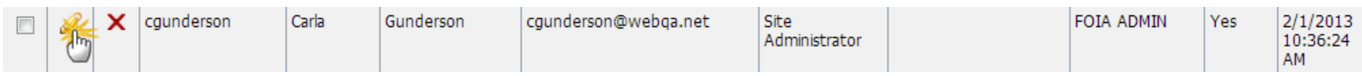
Deactivating:

1. To DEACTIVATE a still active staff members account: Find the "Security" section

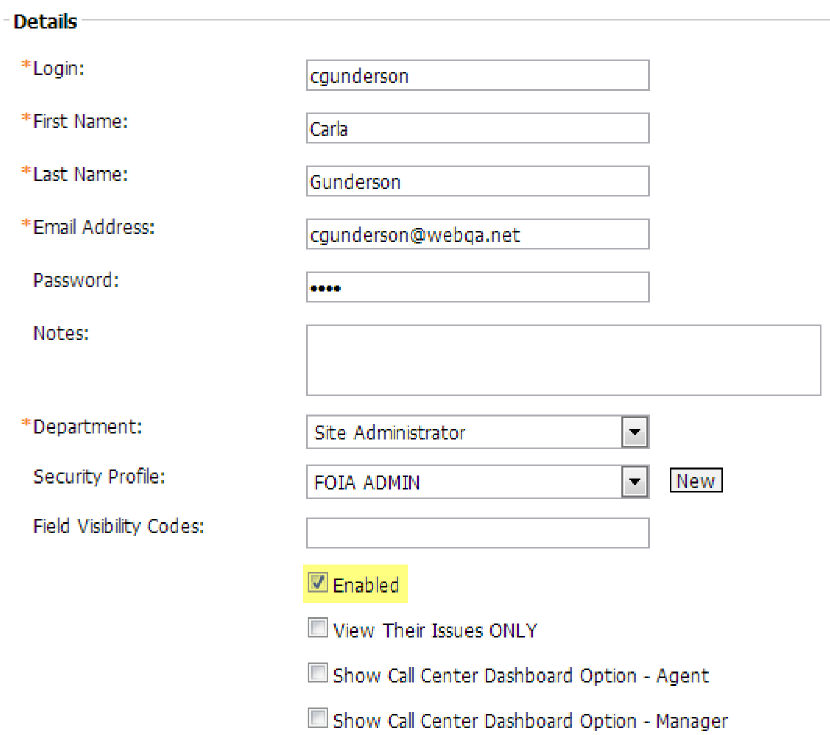
2. You'll be presented several choices: Select "Staff"

3. The system will now display a list of all staff members

Find the staff member whose account you need to deactivate. Select the pencil next to their name to edit.



Within the staff members account information, there is an Enabled check box. By un-checking this box, the staff member can no long access the system. Also by deactivating their account, while they cannot access the system, the system will store all history that this user has ever done.



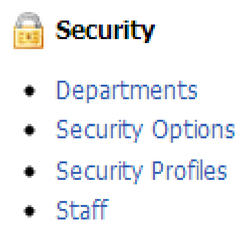
Deactivating an account is the better alternative than deleting a staff member. If you delete their account, you will lose all history in the system.

Once you've unchecked the Enabled box: Click "Save"

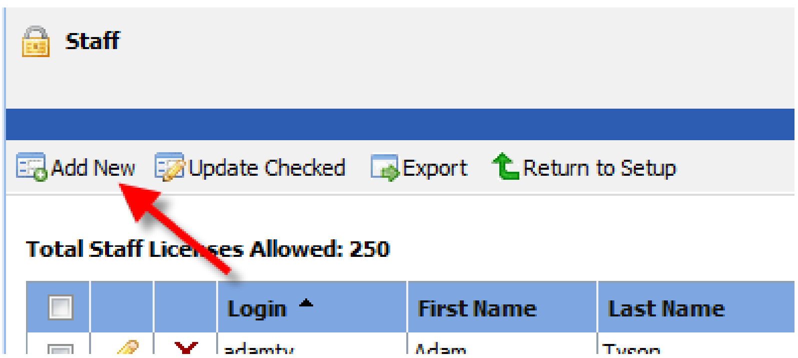
Adding a New User

Whenever a new employee is hired at the City and they will be using the system, they will need a staff account created for them.

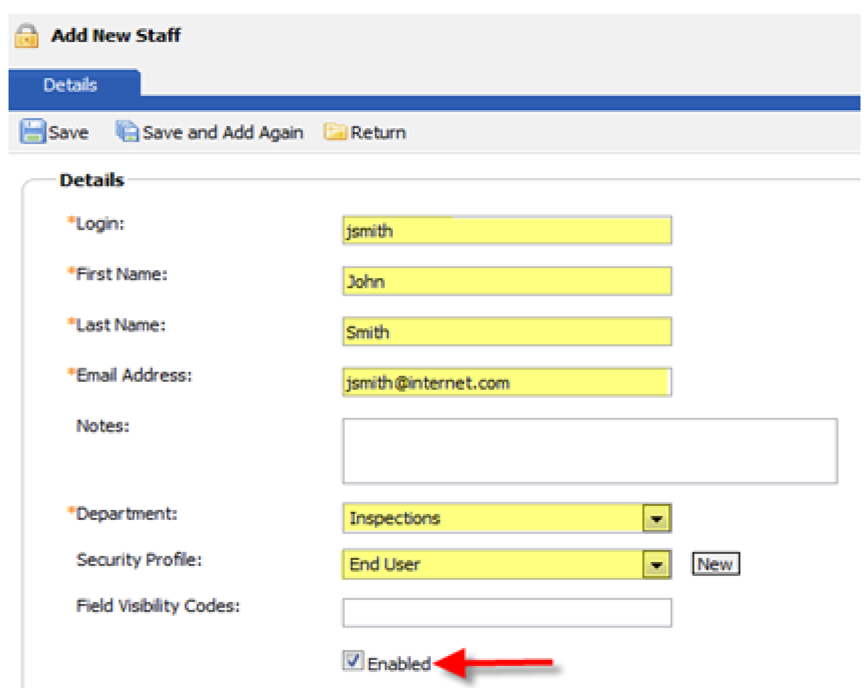
1. To add a new staff members account: Find the "Security" section
2. You'll be presented several choices: Select "Staff"
3. The system will now display a list of all staff members



On the top of the page you will find a button that is labeled "Add New". Select "Add New"



Fill out all required information for the new staff member. Remember to check the "Enabled" box. Click "Save" when complete.



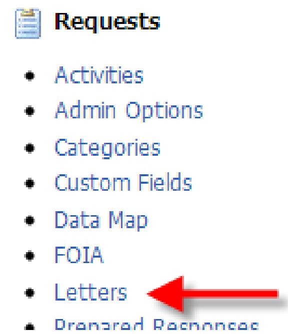
Managing Requests

Letter Templates

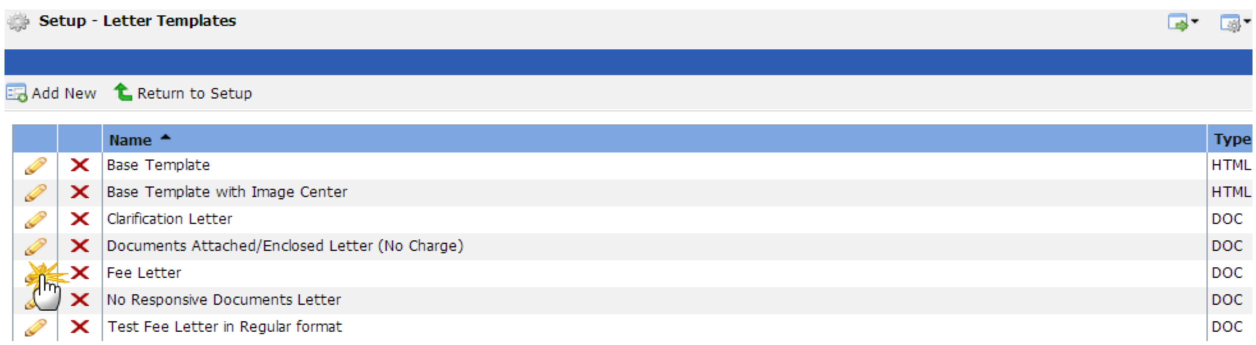
When your system is first implemented, we will import your letter templates for you (if you have provided us with any). However, sometimes you might need to add new ones later on by yourself or make edits to any current ones.

Editing:

1. To edit a letter template: Find the "Requests" section
2. You will be presented several choices: Select "Letters"
3. The system will now display a list of all the current Letter Templates saved in the system

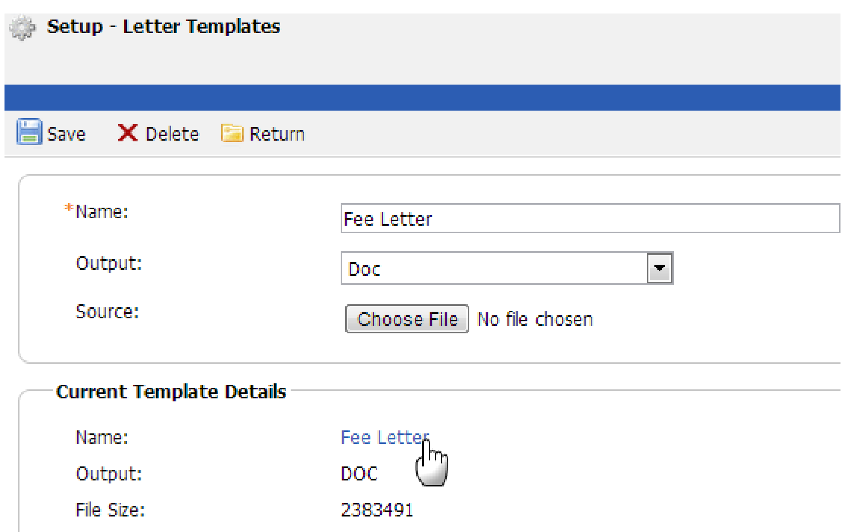


4. To edit a current letter template: Select the pencil to the left of the template



Name	Type
Base Template	HTML
Base Template with Image Center	HTML
Clarification Letter	DOC
Documents Attached/Enclosed Letter (No Charge)	DOC
Fee Letter	DOC
No Responsive Documents Letter	DOC
Test Fee Letter in Regular format	DOC

5. Click on the link under the Current Template Details. The document will now open in Microsoft Word.



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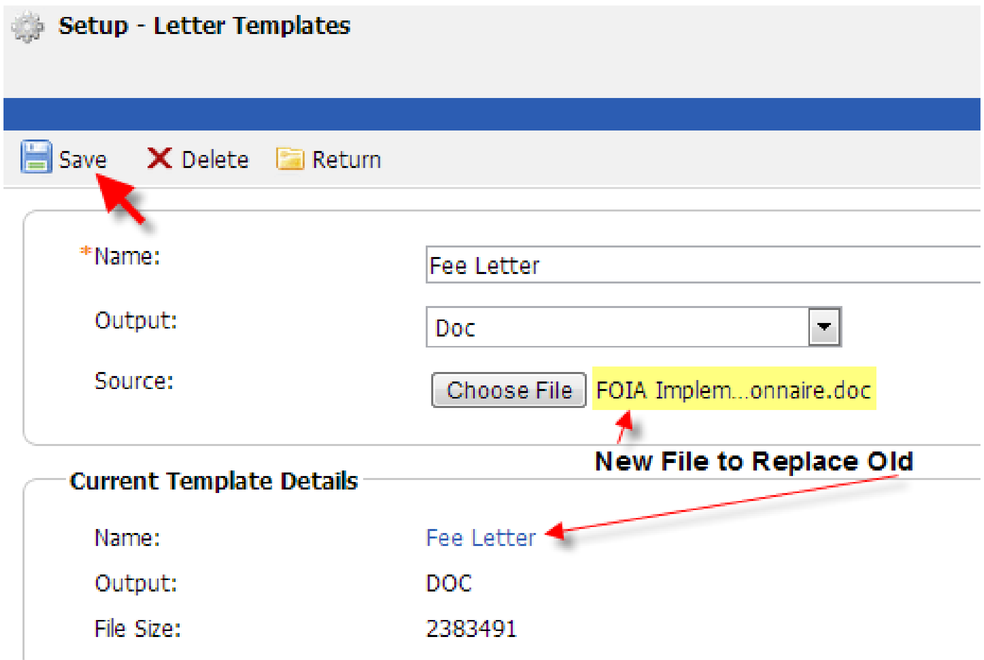
6. Make all changes to the current letter template. Once changes are made, resave the document to your computer.

7. To add the new, edited letter template: Click "Choose File"

8. Select the updated letter template from your computer to replace the old one that is currently in the system. Click "Save" when finished.



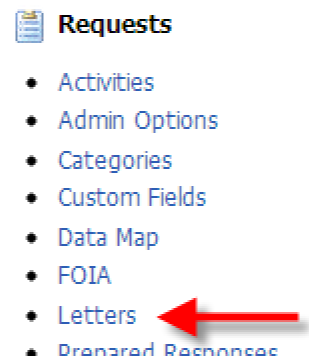
Adding a New Letter Template:

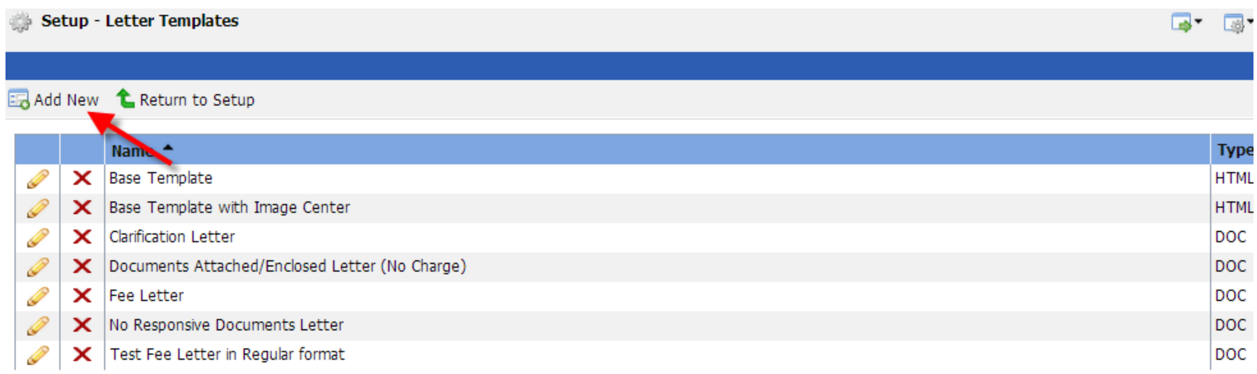
1. To add a new letter template: Find the "Requests" section

2. You'll be presented several choices: Select "Letters"

3. The system will now display a list of all the current Letter Templates saved in the system

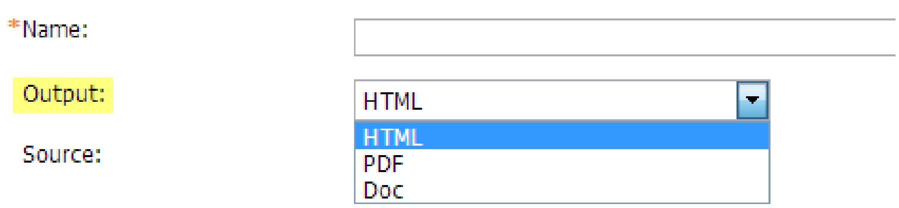
4. To add a new letter template: Select "Add New"





Build out your new letter template in Microsoft Word and save it to your computer. Make sure to include all merge tags. If you are unfamiliar with merge tags, please refer to page 33 of this manual.

1. Change your drop down option for Output to Doc



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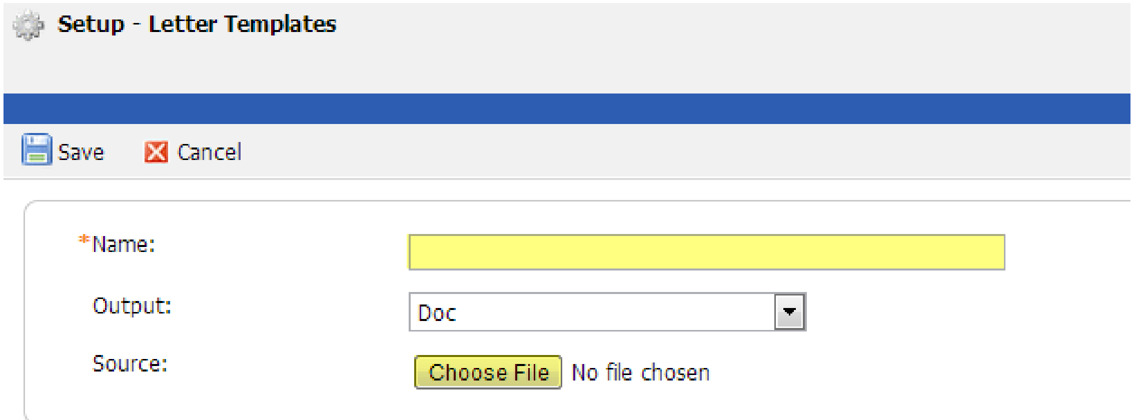
2. Fill out the file name and select the "Choose File" button to pull the document off of your computer



3. Once you've attached the new letter template from your computer: Click "Save"

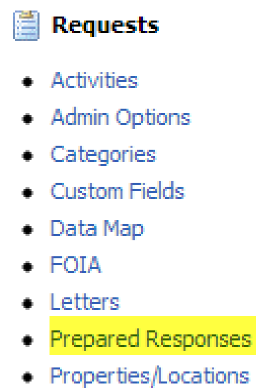
Your new letter template is now saved in the system.

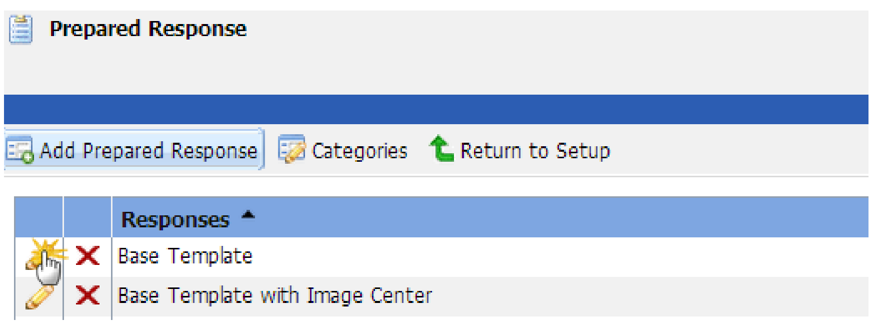
Prepared Responses

When your system is first implemented, we will create prepared responses (e-mails [if you have provided us with any]) for you. However, sometimes you might need to edit current ones or add new ones later on by yourself.

Editing:

1. To edit a prepared response: Find the "Requests" section
2. You'll be presented several choices: Select "Prepared Responses"
3. The system will now display a list of all the current prepared responses saved in the system
4. To edit a prepared response, click on the pencil to the left of the pasted response you want to edit

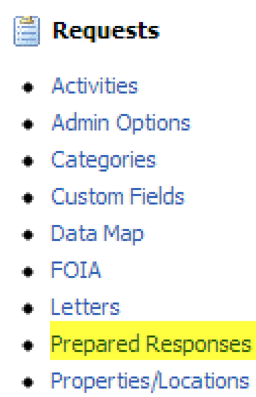




Make any changes needed to your letter template. Click "Save" when finished.

Creating a Prepared Response:

1. To add a new prepared response: Find the "Requests" section
2. You'll be presented several choices: Select "Prepared Responses"
3. The system will now display a list of all the current prepared responses saved in the system



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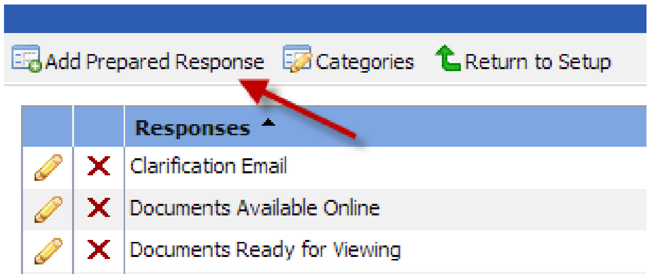
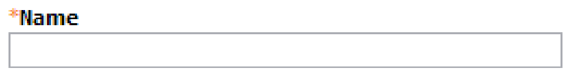
4. To add a new prepared response: Select "Add Prepared Response"



1. Name your prepared response



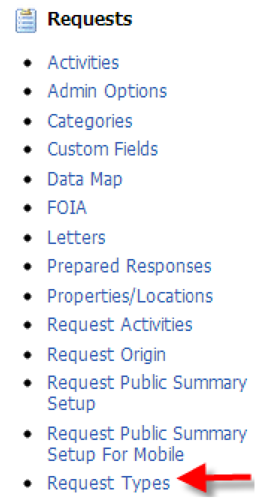
2. Type your prepared response just like you would a letter. You should use merge tags for fields that should be merged in (e.g. [CURRENT_DATE], [REFERENCE_NUMBER], etc.). If you are not sure how merge tags or custom fields work, please refer to page 31 of this manual. You can also look at the prepared responses that were added to the system when it was implemented and use them as a reference.

3. Once you have finished working on your prepared response, Click "Save"

Request Types

Custom Fields

Within your Request Type you will have the ability to create custom fields. Custom fields are the areas that your citizen would fill out on the portal regarding their request or your staff user would fill out when entering a new request into the system on behalf of a citizen.

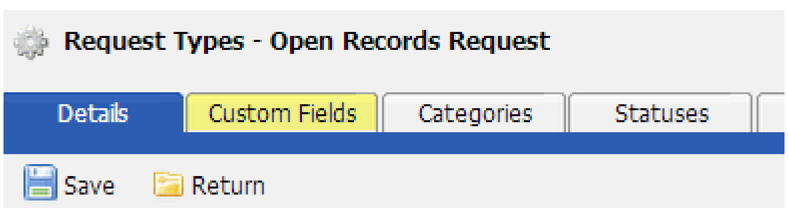


1. To add a custom field: Find the "Requests" section

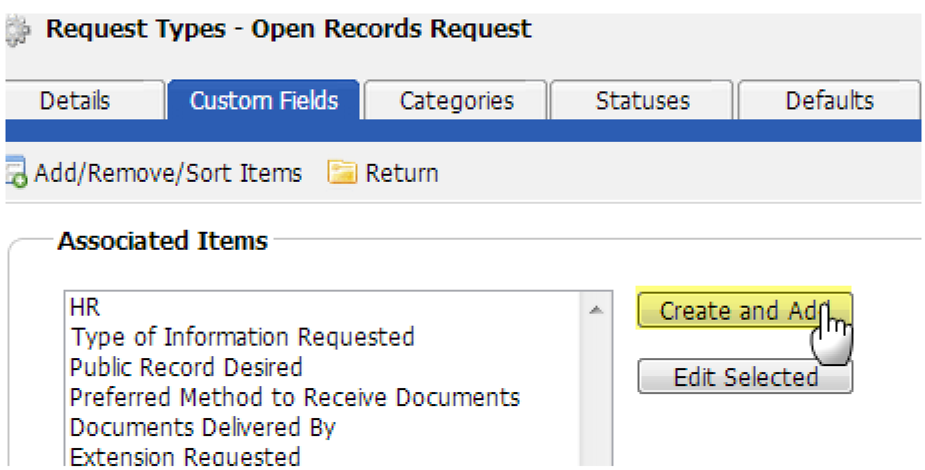
2. You'll be presented several choices: Select "Request Types"

3. Select the request type that you need to add the letter template to by clicking on the pencil to the left of the request

4. Once you are in the request, you will see several management tabs located on the top: Select "Custom Fields"



5. When you are in the custom field tab: Select "Create and Add"



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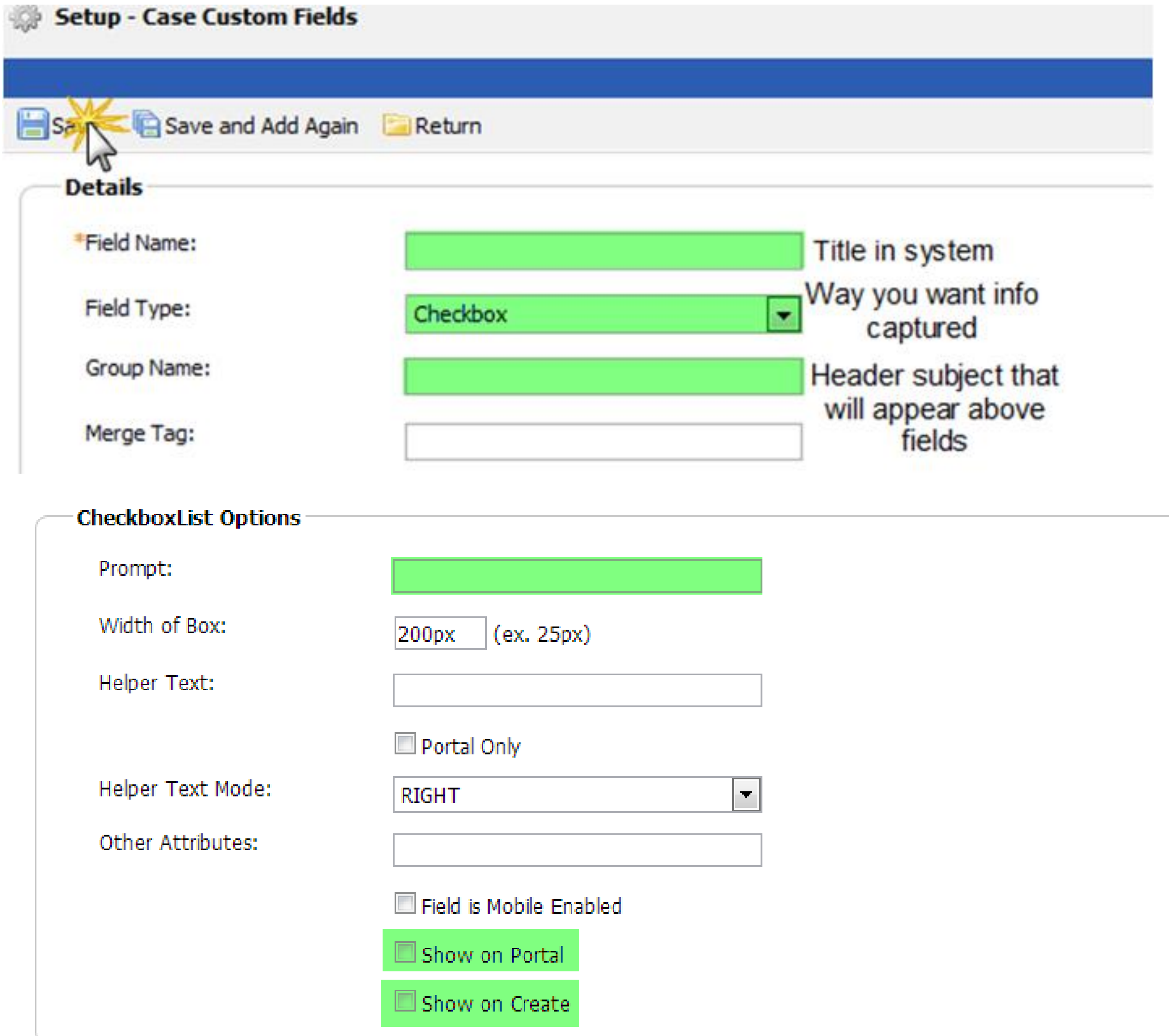
6. Fill out all required (highlighted) fields. Fill out Merge Tag field if you need this custom field in a letter template. Check if you want this custom field visible via the portal/when staff member is creating a new request. Click "Save" when finished.



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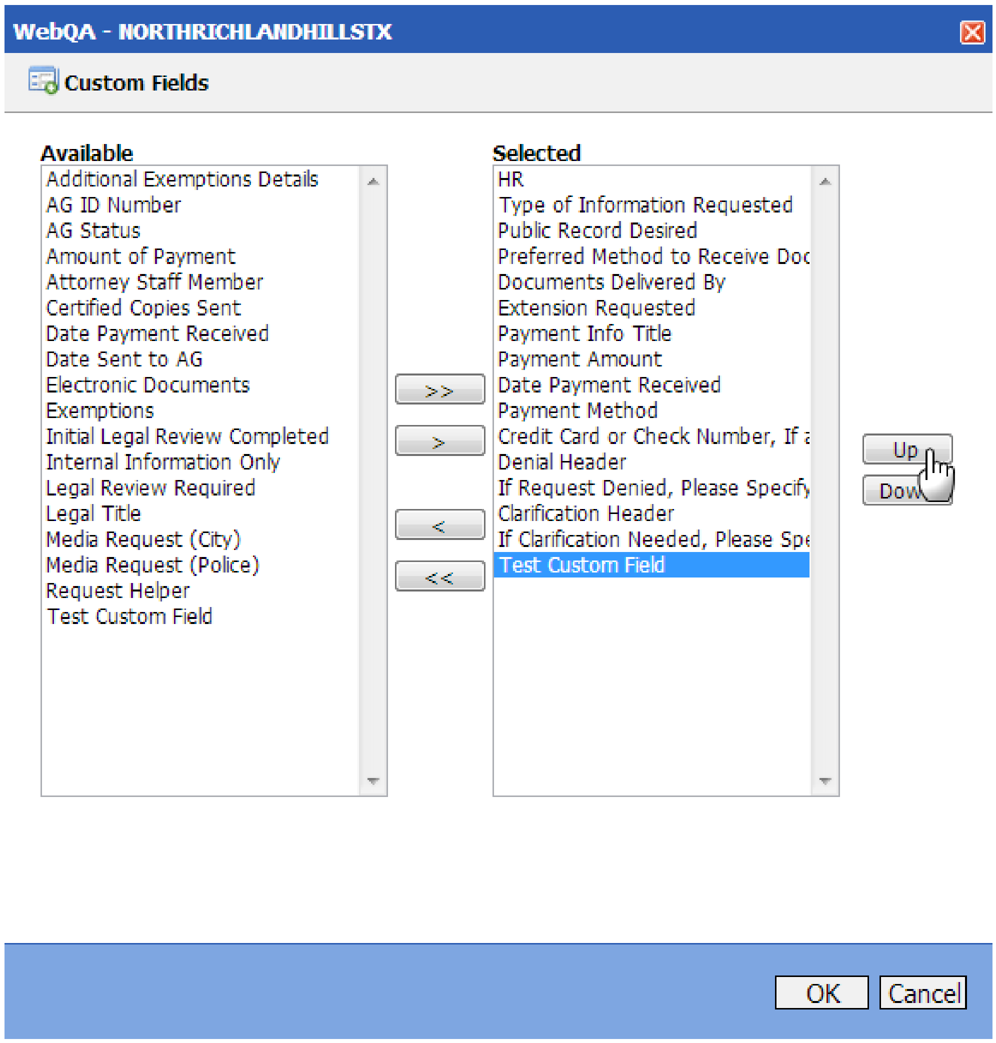
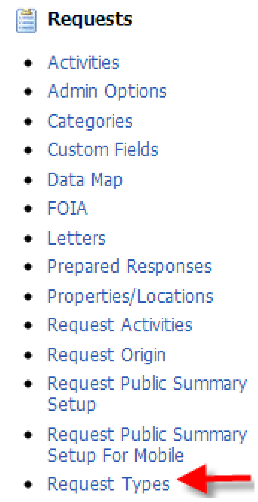
Once saved, your custom field will now appear on your list of custom fields. If you need to rearrange the order of your custom fields, select "Add/Remove/Sort Items" on the top tool bar. A pop out window will appear. Select which custom field you would like to move by clicking it. Rearrange the list by selecting the up/down buttons on the right.



7. Click "OK" when finished.

Statuses

Within your Request Type, you will have the ability to create statuses for your Requests Types and set what statuses close (lock) your requests. Closed statuses do not allow a citizen to make any changes to their request after they have submitted it on the portal.

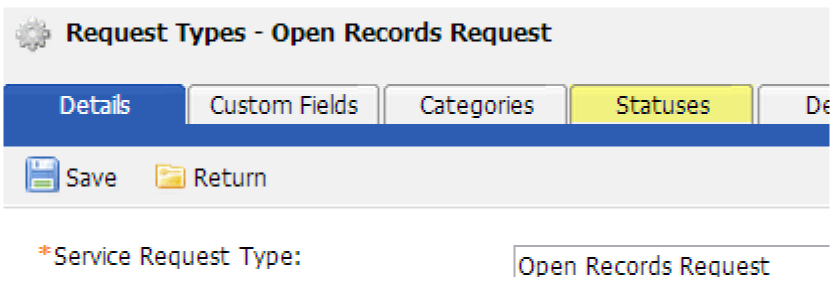


1. To add a status: Find the "Requests" section

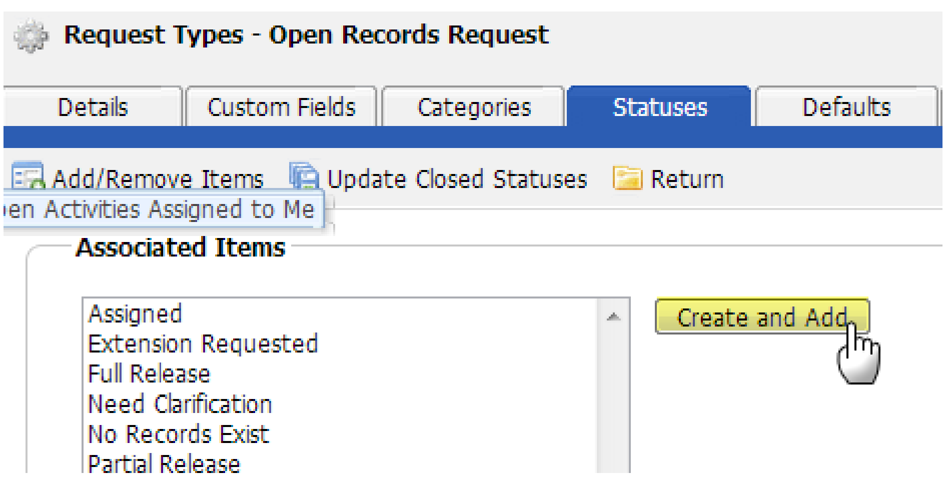
2. You'll be presented several choices: Select "Request Types"

3. Select the request type that you need to add the status to by clicking on the pencil to the left of the request

4. Once you are in the request, you will see several management tabs located on the top: Select "Statuses"



5. When you are in the statuses tab: Select "Create and Add." A pop up window will appear



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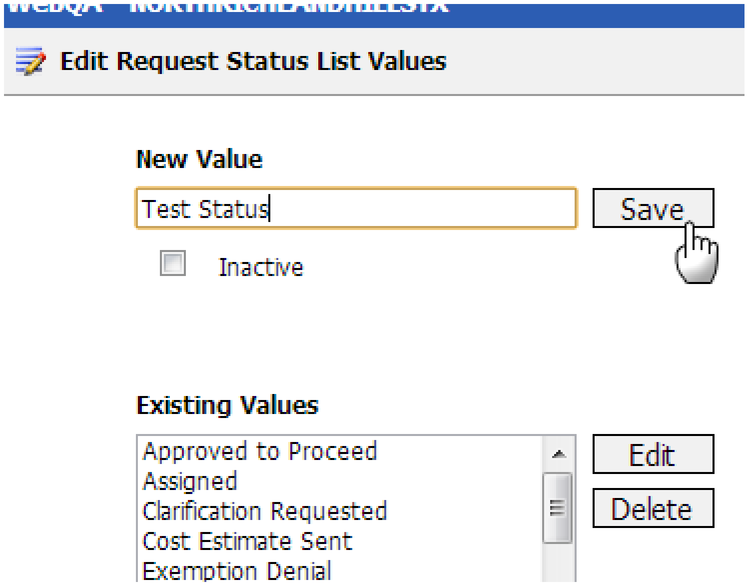
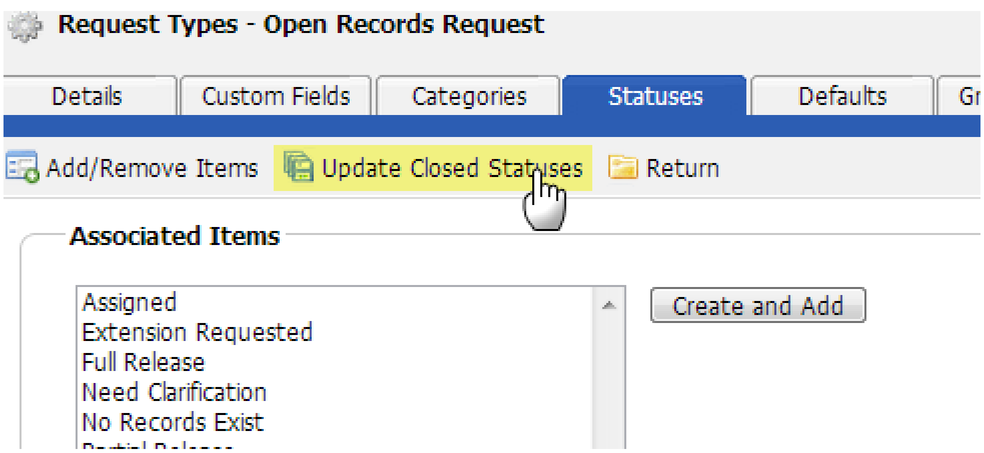
6. Type in the new status in the New Value filed. Click "Save" when finished. Click "Done" when you are finished entering in all of your new statuses.



Your new status will automatically add to your complete list of statuses. If you wish to add this status to your list of closed statuses, click "Update Closed Statuses" on the top.



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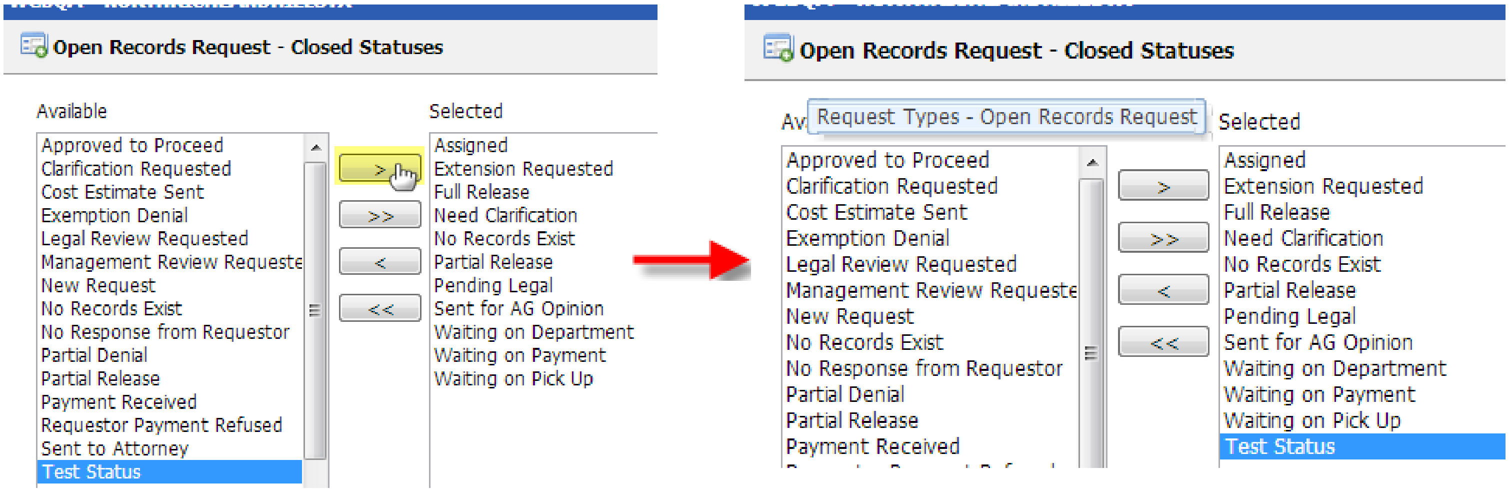
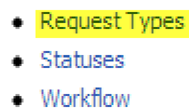
7. Another popup window will appear. Move over your available status to the selected side by highlighting it and clicking the arrow over. Click "OK" when finished. Your status will now lock the request from any edits by the customer.



Responses & Letters

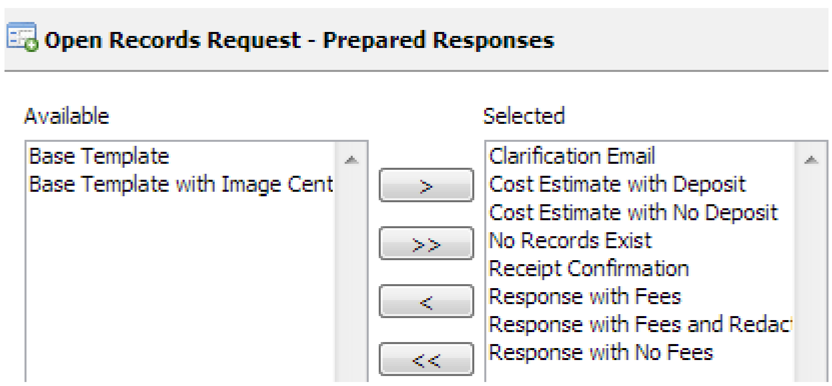
After you have finished creating and/or editing your letters or prepared responses, you will need to associate them to the request type – otherwise they will not show as available.

1. From Setup: Find the "Requests" section
2. Select: "Request Types"

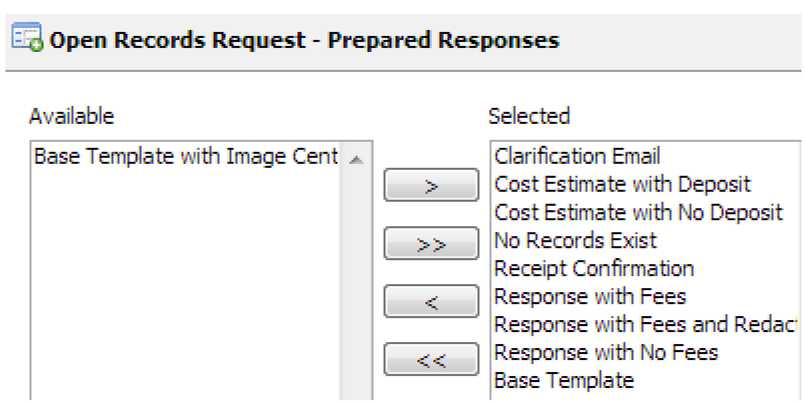


3. Search for the request type (more than likely, you will just have one) and click on the pencil
4. At the top, you will see multiple tabs. Click on "Responses" or "Letters"

5. Click on "Add/Remove Items." A new window will come up: In the left column you will see a list of the letters/prepared responses that you have available to select. On the right, you will see a list of the letters/prepared responses that are already associated to that specific request



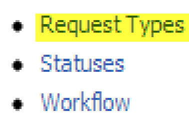
6. To associate that letter/prepared response with the request, simply double-click it and it will be moved over to the "Selected" column. Click "Save"



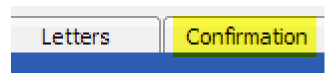
Confirmation

After a customer submits a request, we can display a confirmation message as well as send them an email.

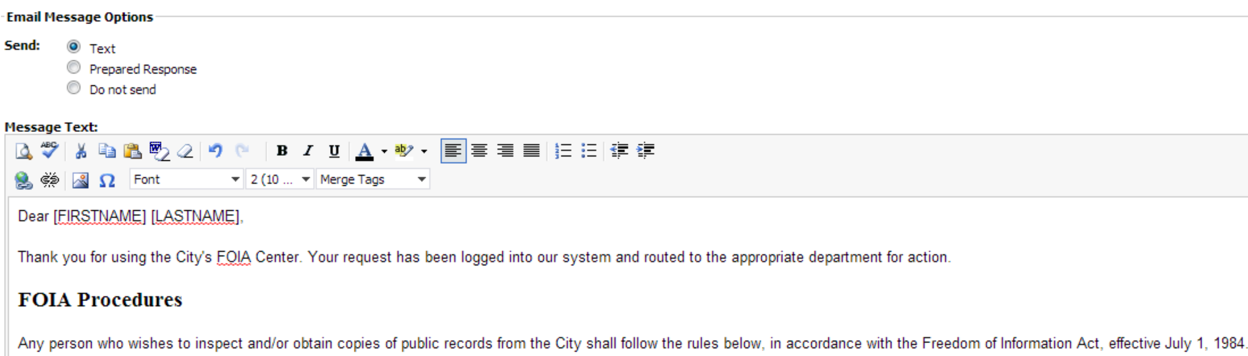
1. From Setup: Find the "Requests" section



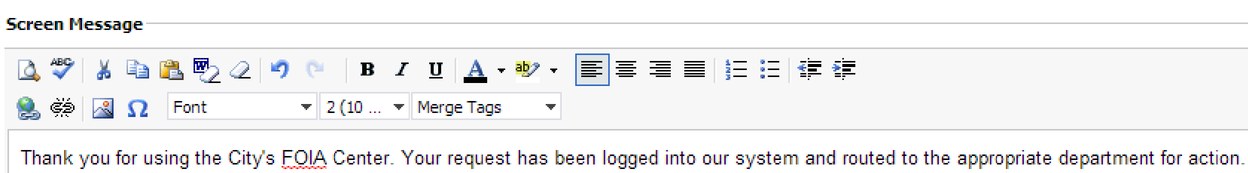
2. Select: "Request Types"
3. Search for the request type and click on the pencil
4. At the top, you will see multiple tabs. Click on "Confirmation"



5. For the confirmation email, you can free type in the box provided or you can use a prepared response. If you use a prepared response, be sure to follow the steps…



To display an on-screen confirmation message after a customer submits a request, use the "Screen Message" box.



After you have finished editing or creating your confirmation messages, Click "Save"

Workflow

Managing Workflow Rules

The system allows you to create custom rules to automatically route out your request to the correct individual. This is something that is set up by your Implementation Coordinator. However, as you start to make changes to your system, you might need to create new workflow rules. Workflow rules can become incredibly difficult and are very in-depth. If at any time you are unsure about what rules to create, contact customer support and they will walk you through the process. However, below is a quick guide for your reference.

Within the system there are 3 different types of workflow rules that can run:

1. **Item created Rule**: This will apply to any match on the initial creation of a request type. For example: Type of Information Requested = Budget Records, THEN set assigned staff to Carla Gunderson

2. **Matching Conditions Rule**: This will apply to already created requests. This rule looks for a specific condition or set of criteria in order to trigger an action. For example: If Legal Review Required = Yes, THEN Send email to assigned staff

3. **Timed Rule**: This is a rule that will occur after a specified amount of time. For example: If a request has been open for 6 hours AND initial legal review completed DOES NOT EQUAL yes, THEN Send email to Harry Romney

Every Workflow rule contains criteria (or a set of criteria) AND an action

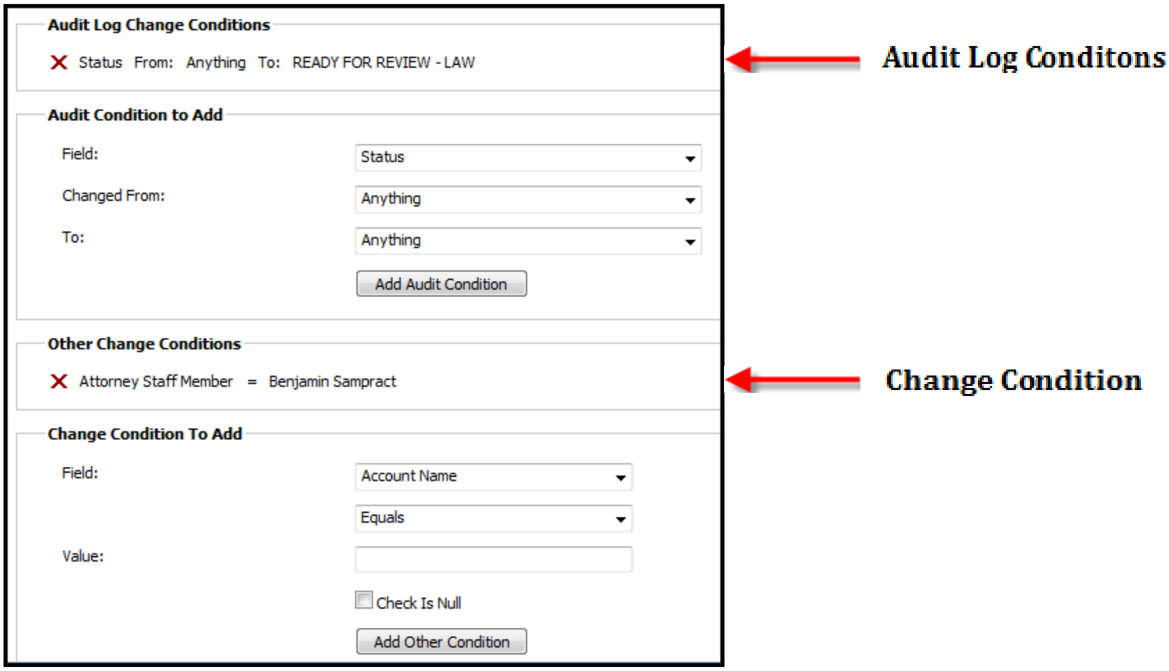
The criterion is broken down into “Audit Log” and “Change Conditions”:

1. **Audit Log Conditions**: These are system fields such as status, assigned staff, assigned department. These fields require a change. For example: If assigned department changes from “Anything” to “Human Resources” THEN Send Email to Carla Gunderson and Harry Romney

2. **Change Conditions**: These are all other custom fields: For example: Type of Information is a type of change condition

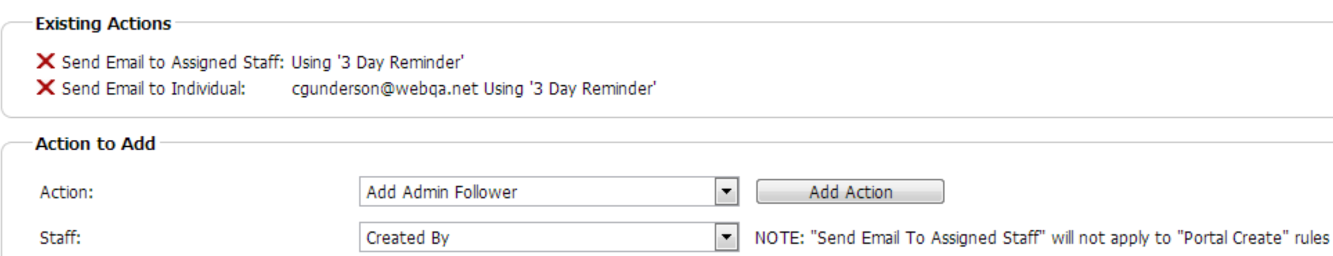
Continue on to the next page…

Please see below for an example of each in the system:



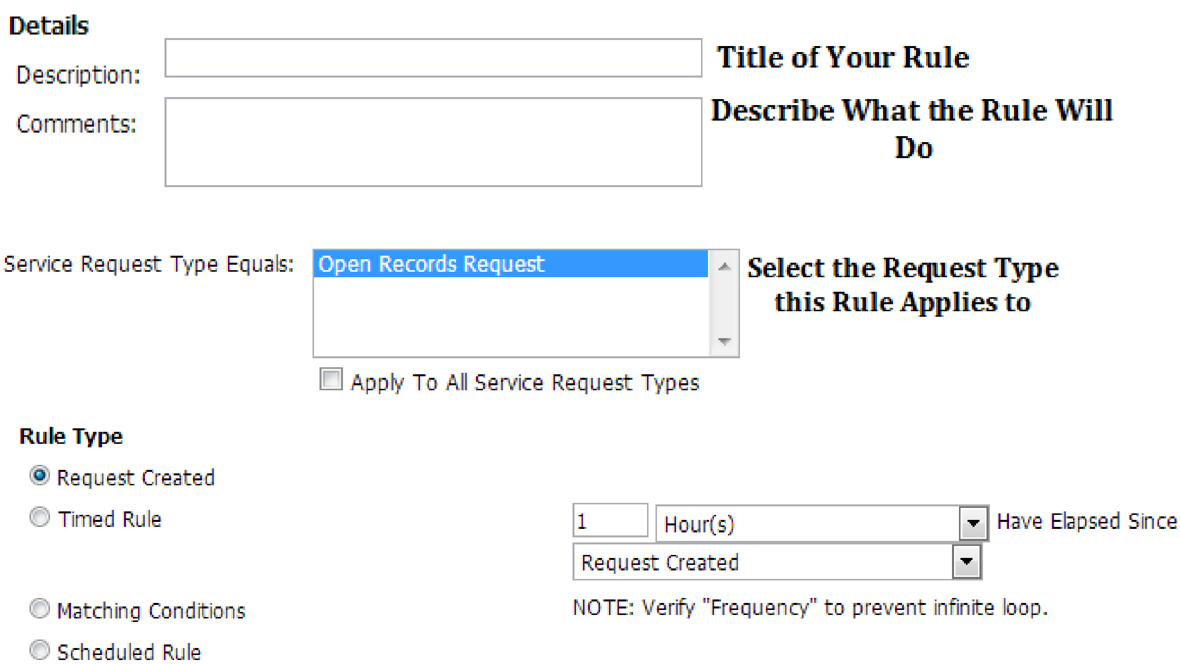
Actions will specify what needs to occur if the conditions are met. There are different types of Actions you will be able to do:

- Set Assign Staff to a Request
- Send Email to Assigned Staff
- Send Email to Individual
- Set Status
- SLA Pause/Resume
- Create Activity



Creating a New Workflow Rule

1. To add a new workflow rule: Find the "Request" section
2. You'll be presented several choices: Select "Workflow"
3. The system will now display a list of all workflow rules: Select "Add New"
4. The first window will display to set up the description and the rule type.
5. The only information required for this part is the Description, Service Request Type, and Rule Type



To Complete Rule Type:

- If this is a "Request Created" or "Matching Conditions" rule-select and click "Save"
- If this is a "Timed Rule" – select the appropriate time constraints (Typically you will select "*X Working Hours* have elapsed since *Request Created*"
- Click "Save"
- The rule will close and register and you must find your new rule and click on the pencil in order to edit
- Add in a condition(s)

- Add in an action(s)
- Save!

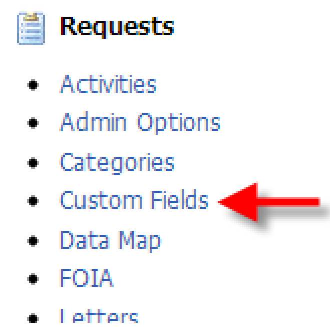
Remember: A request can only have 1 assigned staff member at a time

Merge Tags

When creating a new letter template, you might need to use merge tags. Merge Tags are located in different locations of the system. Merge Tags can either be found in the custom fields or the prepared responses.

Within Custom Fields:

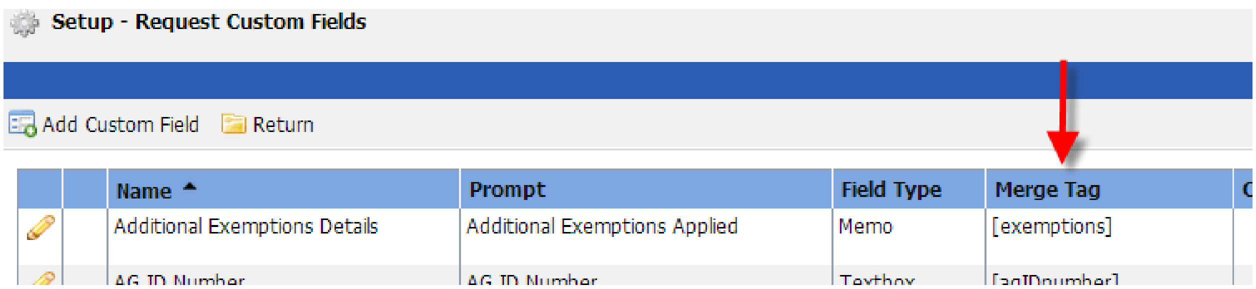
1. To find a merge tags within custom fields: Find the "Request" section



2. You'll be presented several choices: Select "Custom Fields"

3. The system will now display a list of all custom fields in the system

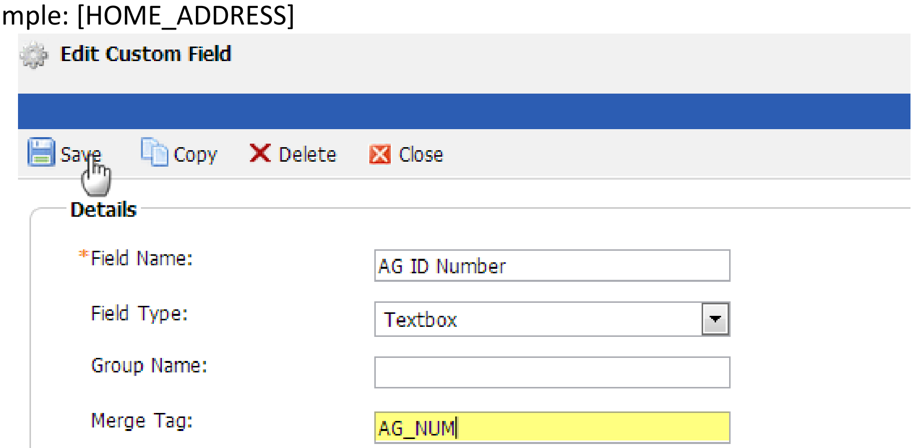
4. The fourth column labeled "Merge Tags" is the merge tag you will need to pull that field automatically in a letter template



If the custom field does not have a merge tag:

1. Click the pencil next to the custom field you need to create a merge tag for

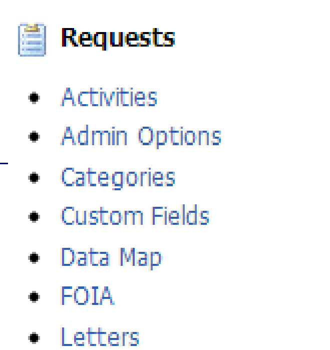
2. For brand new merge tags created by a user, the merge tag must appear in all capital letters. If a space is needed, you will have to use an underscore
   Example: [HOME_ADDRESS]



Within Prepared Response:

Merge Tags are found in two spots within the prepared responses:

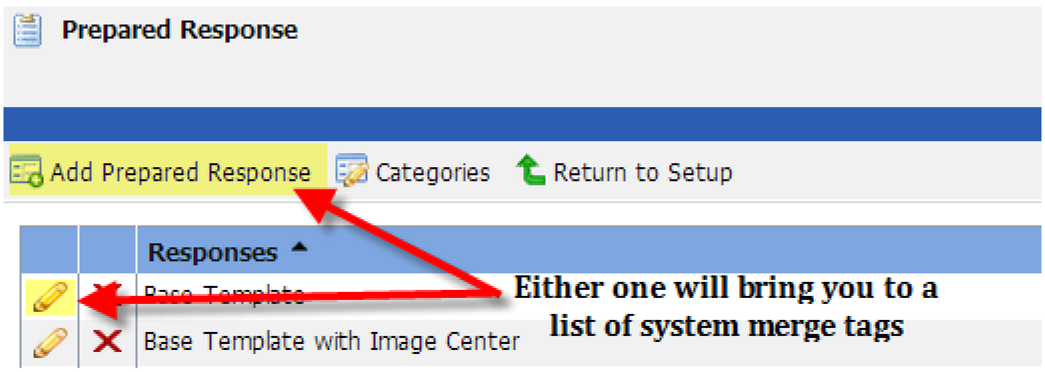
1. To find a merge tags within prepared responses: Find the "Request" section



2. You'll be presented several choices: Select "Prepared Responses"

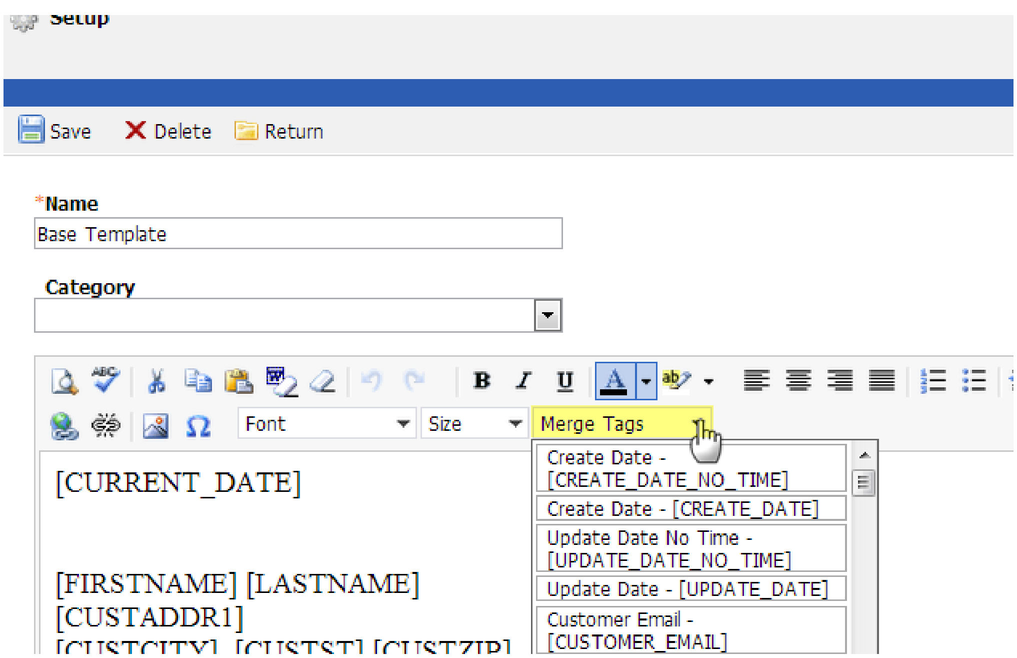
3. The system will now display a list of all prepared responses in the system

4. Select the pencil next to any prepared responses currently in the system or select Add Prepared Responses



Within the prepared response, merge tags are located in two places:

Drop down list: Click on the arrow. This will display a drop down list of all merge tags.



Merge Tag List: At the bottom of the prepared response is a list of all merge tags.