# Overview

The purpose of this document is to record the email requirements for Philly311 CRM.

# Pilot Email Requirements

For the six (6) service request types and one (1) information request type (listed above), Unisys will configure:

* Service Request Entry screen for validating the entry process and
  + E-mail Auto Response Rules
* Configure the SFDC Service Cloud platform and Community Portal per the approved Business Configuration Design Document including:
  + Email Templates

Unisys will configure the Marketing Campaign functionality to provide the ability for the City to:

* Create marketing campaigns for:
  + Schedule and communicate neighborhood meetings electronically e-mail and Community Portal

# Citywide Email Requirements

For the remaining sixty-four (64) service request types listed above, Unisys will configure:

* Service Request Entry screen for validating the entry process and
  + E-mail Auto Response Rules

Unisys will activate the following functionality in the SFDC platform:

1. Emails of Service Requests to one (1) Philly 311 e-mailbox
2. Email confirmations from the 311 center for example to constituents/users, or other correspondence such as customer satisfaction surveys after Service Request completion
3. Email service request notifications (assignment of a service request) and escalations (breach or potential breach of SLA) from the 311 center to Service providers.
4. Email to queue members when a new case is added to their queue (user’s preference).
5. Send notifications to customers upon case status change (including case closure).

The use case for texting functionality involves the ability to send text to an email address of the 311 mailbox and receive confirmations from the City. Any outbound texts from the City will not be supported. Unisys will activate the following functionality in the SFDC platform:

1. The use case for texting functionality involves the ability to send text to an email address of the 311 mailbox and receive confirmations from the City.

* Texts of service requests to the 311 e-mailbox

# Action Items – The City

* The City of Philadelphia will determine the end users included in the Pilot and provide Unisys with the end user name, department, e-mail address, and telephone number.
* The City of Philadelphia will provide Unisys the templates for both internal and external e-mail notifications.
* The City of Philadelphia will provide Unisys with a list of Citywide implementation end users including the end users name, department, e-mail address, and telephone number.
* The City will provide Unisys with the [Pilot Service Request] email templates to configure in the SFDC Service Cloud platform.
* The City will provide Unisys with the [Citywide Service Request] Email Templates for the SFDC Service Cloud.
* The City will provide Unisys with the [Marketing Campaign] Email Templates for the SFDC Service Cloud.

# Action Items – Unisys

* Develop, distribute and review Integration Design Document (enhanced from the previous version developed for the Pilot solution with the following topics)
  + E-mail Channel Design Document
* Configure the SFDC Service Cloud and Community Portal per the approved [Citywide Service Request] Business Configuration Design Document including:
  + Email Templates
* Configure Email Channel in the Citywide SFDC Service Cloud platform
* Develop and unit test each channel configuration and integration
  + E-mail Channel Configuration
* Configure the SFDC Service Cloud and Community Portal per the approved [Marketing Campaign] Business Configuration Design Document including:
  + Email Templates
* Resolve significant Deviations from the Design Document that arise from the testing for those Service Requests and Interfaces that are designated as the responsibility of the Unisys staff. This will consist of:
  + Validation of the configured Email functionality of the SFDC platform

# Deliverables

* Technical Requirements Definition Document
  + E-mail Channel Requirements Definition Document
* Technical Detail Design Document
  + E-mail Channel Design Document
* Configured/Developed the channels and integrations
  + E-mail Channel

# Assumptions

The Unisys consulting team will also need access to the City LAN for printing, VPN access to Unisys e-mail and Intranet, as well as accessing any City applications in the course of developing and installing the solution. The exact list of applications that will be needed to access will be finalized upon project start up between the City Project Manager and the Unisys Project Manager. Such usage will be for the benefit of work specified herein. The City will identify the City configuration resources to support the project.

Unisys assumes that text will be sent to a single City email account.

# Appendix C Requirements

| **Reference Number** | **Service Request Requirements** | **Type** | **Implementation Plan** | **How Provided** | **Workshop Notes** |
| --- | --- | --- | --- | --- | --- |
| 1.39 | The solution provides ability to automatically route constituent requests and items to the appropriate provider, department or staff for prompt action, **to notify the department that the request is in queue,** and to allow the department to forward the request to another department or return it to Philly311 if necessary | F | SFDC Service Cloud application will be configured by creating Workflow rules in the workflow engine to implement this requirement. After requests are automatically placed into queue for processing, the solution will be configured to automatically notify users and department of the new request. Once in the queue, request may also be forwarded to other departments as needed. | SFDC Service Cloud | Queue members have the option of receiving emails when a new case is assigned to their queue. This is a user-defined option. |
| 1.43 | The solution allows **notification of an item in the work queue (or member(s) of group) via email** or dynamic refresh of the work queue display | F | SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | Queue members have the option of receiving emails when a new case is assigned to their queue. This is a user-defined option. |
| 1.51 | The solution provides alerts and **notifications to responsible party upon call assignment or when past due** | F | SFDC Service Cloud application will be configured by creating workflow rules to alert or notify responsible party based on predefined expiration rules including time, inactivity, or business process. | SFDC Service Cloud | Included in escalation rules.  Included Redress workflow for Streets Cases. |
| 1.59 | By text | F | SFDC Service Cloud application will be configured to enable text requests **via email** | SFDC Service Cloud | Texts will be received in an email account which will prep cases for agent review. |
| 1.61 | **By E-mail** | CU | Salesforce.com will be configured to **monitor an email address and automatically create service requests from inbound emails** | SFDC Service Cloud | An inbound email account will be created that will create prep cases from inbound emails for agent review. |
| 1.65 | The solution provides ability to support both **unstructured and structured inbound e-mails** | F | SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | Currently no use case for structured email formats has been proposed. Unstructured emails will create prep cases for agent review. |
| 2.11 | The solution provides ability to **send e-mail confirmations of any changes constituents made to their constituent profile** | F | SFDC Service Cloud application will be configured by creating workflows to provide email confirmation of any changes constituents make to their profile. | SFDC Service Cloud | The current implementation does not give access to constituents to make changes in their profiles, per City requirements. |
| 2.14 | The solution provides ability to **notify constituent of the expected SLA for the request type and direct them to place a call for more urgent needs** | F | SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | SLA may be included in the email templates. |
| 2.20 | The solution provides ability to optionally require an **e-mail address confirmation on entry point** | F | SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | Customer Portal Users are required to provide an email address. Email Address could be made a required Contact field, but is not per current City requirements. |
| 2.29 | The solution provides ability to automatically **send an email to the constituent that submits a request through the website to acknowledge receipt with the unique service request number** | F | SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | Case number may be included in the email templates. |
| 2.30 | The solution provides ability for constituent to identify **multiple email addresses to be used for confirmation or status updates** | F | SFDC Service Cloud application will be configured by adding additional fields for the constituents to enter multiple email addresses. | SFDC Service Cloud | Additional email fields could be added to Contact page layout, but is not currently in requirements. |
| 2.33 | The solution provides ability to **notify constituent upon change of status such as completion of request**.  For “Miscellaneous” type, the notification not to be sent for completion of request. | F | SFDC Service Cloud application will be configured by creating workflow rules to send notifications to constituents upon change of status. | SFDC Service Cloud | Can be setup in Salesforce. |
| 2.39 | The solution provides ability for constituents to **opt-in/out of e-mailings**, newsletters, survey and/or special promotions | F | SFDC Service Cloud application will be configured by adding fields to allow constituents to op-in/out of emails, newsletters, survey and/or special promotions. | SFDC Service Cloud | Only Graffiti has this requirement. |
| 3.14 | The solution provides ability to create **customer satisfaction surveys that can be delivered via phone, e-mail** or web according to preferred contact method | TP | SFDC Service Clound application will be configured by creating workflow rules to send Customer Satisfaction surveys by using an 3rd party App Exchange 3rd party tool called *Surveyforce* | **SurveyForce** | Will be configured as part of SurveyForce. |
| 4.23 | The solution provides ability for internal users to subscribe to receive **notification of changes to the knowledge base or FAQs, based on subject/section** | F | SFDC Service Cloud will be configured to allow users subscribe to individual articles and receive updates. The application will also display a visual indication for newly published or edited knowledge articles. | SFDC Service Cloud | Subscription to KB articles |
| 4.24 | The solution provides ability for knowledge base administrator to manually or automatically send **notification of changes to the knowledge base or FAQs to internal users, based on subject/section** | F | SFDC Service Cloud application will be configured to indicate newly published or edited knowledge articles. Users will subscribe to receive updates on individual articles.. | SFDC Service Cloud | Subscription to KB articles |
| 5.36 | The solution provides ability to **generate letters** with appropriate formatting for mailing **or sending via email** | SR | SFDC Service Cloud application will be configured to implement this requirement on individual records. This is only supported on Internet Explorer 7.0 and above. | SFDC Service Cloud | Generation of emails available from Case or Contact records. |