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| **Philly CRM 311**  **Technical Design – SR-LI28 Zoning Business**  **V1.4** |
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# REVISION HISTORY

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| --- | --- | --- | --- |
| **Revision Number** | **Revision Date** | **Summary of Changes** | **Author** |
| 1.4 | 04/07/2014 | This document was created based off requirements document “SR-LI28 Zoning Business Requirements Definition” | Anne Egan |

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# 2 – SERVICE REQUEST INFORMATION

|  |  |
| --- | --- |
| **Case Record Type :** | Zoning Business |
| **Service Request ID** | SR-LI28 Zoning Business |
| **Service Request Type** | Zoning Business |
| **Department** | License & Inspection |

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| 2.1 ENTITY RELATIONSHIP DIAGRAM |



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| 2.1.1 CASE STANDARD FIELDS |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Field Label** | **Field Name** | **Data Type** | **Required** | **Unique** | **Default Value** | **External ID** | **Rule #** | **History** | **Help Text** |
| Status | Status | Picklist  **Values:** New, In-Progress, Escalated, On Hold, and Closed | Yes | No | New | No | None | Yes |  |
| Case Origin | Origin | Picklist  **Values:** Phone, Email, Web | Yes | No | Phone | No | None | Yes |  |
| Priority | Priority | Picklist  **Values:** High, Medium, Low | Yes | No | Medium | No | None | Yes |  |

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| 2.1.2 CUSTOM FIELDS |

| **Field Label** | **Field Name** | **Field Type** | **Required** | **Unique** | **Default Value** | **External ID** | **Rule #** | **History** | **Help Text** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Request Type | RequestType\_\_c | Picklist  **Values:** Advertising Sign Complaint, Business Operating Without Proper License, Honor Box Problem, Property Used Without Proper Zoning, Sign Without Permit Attached to Property, Towing Company Complaint, Zoning Poster Not Posted | Yes |  | No |  | None | No | What type of zoning business problem is being reported? |
| P~~roperty~~ Improperly Used as Residential | PropertyImproperlyUsedasResidential\_\_c | Dependent Picklist  (Controlling field = *Request Type*)  **Values:** Yes, No  **Default:**  Field is enabled and required if *Request Type* = ‘Property Used Without Proper Zoning’ | No |  |  |  | Validation Rule #1, Workflow Rule #1 | No | Is the commercial property being used as RESIDENTIAL without proper zoning permits? (Example: An old warehouse converted into apartments without a proper zoning/use permit.) |
| Commercial or Residential | CommercialorResidential\_\_c | Dependent Picklist  (Controlling field = *Request Type*)  **Values:** Commercial, Residential  **Default:**  All values are shown if *Request Type* = ‘Property Used Without Proper Zoning’  . | No |  | This read-only field will be automatically populated from the GIS Zoning layer associated with the GIS record selected as the Service Request Location |  | Validation Rule #2 | No | What type of building is it? (Commercial or residential.) |
| Current Property Use | CurrentPropertyUse\_\_c | Dependent Text(255)  (Controlling field = *Request Type*)  Field is enabled and required if *Request Type* = ‘Property Used Without Proper Zoning’ | No |  |  |  | Validation Rule #3 | No | What is the building currently being used for? (Example: Operating a hair salon but building used to be a hardware store.) |
| Business Hours of Operation | BusinessHoursofOperation\_\_c | Dependent Text(255)  (Controlling field = *Request Type*)  Field is enabled and optional if *Request Type* = ‘Business Operating Without Proper License’ | No |  |  |  | Validation Rule #4 | No | What are the hours of operation? (if known) |
| Business Type | BusinessType\_\_c | Dependent Text(255)  (Controlling field = *Request Type*)  Field is enabled and required if *Request Type* = ‘Advertising Sign Complaint’ OR ‘Business Operating Without Proper License’ | No |  |  |  | Validation Rule #5 | No | What type of business is it? |
| Sign on Street Pole, Median or Curb | SignonStreetPole,MedianorCurb\_\_c | Dependent Picklist  (Controlling field = *Request Type*)  **Values:** Yes, No  All values are shown if *Request Type* = ‘Advertising Sign Complaint’ | No |  |  |  | Validation Rule #6, Workflow Rule #2 | No | Is the sign on a street pole, median, or at a sidewalk curb? |
| Sign Location | SignLocation\_\_c | Dependent Text(255)  (Controlling field = *Request Type*)  Field is enabled and required if *Request Type* = ‘Advertising Sign Complaint’ | No |  |  |  | Validation Rule #7 | No | Where is the sign located on the property? |
| Honor Box Outside Regulated Area | HonorBoxOutsideRegulatedArea\_\_c | Dependent Picklist  (Controlling field = *Request Type*)  **Values:** Yes, No  **Default:**  All values are shown if *Request Type* = ‘Honor Box Problem’  **Can this be determined automatically by the service address and GIS information? See Action Item #3.** | No |  |  |  | Validation Rule #8, Workflow Rule #3 | No | Is the honor box outside the area regulated by L&I? |
| Honor Box Improperly Maintained | HonorBoxImproperlyMaintained\_\_c | Dependent Picklist  (Controlling field = *Request Type*)  **Values:** Yes, No  **Default:**  All values are shown if *Request Type* = ‘Honor Box Problem’ | No |  |  |  | Validation Rule #9, Workflow Rule #4 | No | Is the honor box being improperly maintained? |
| Seeking Refund for Vehicle Not Released | SeekingRefundforVehicleNotReleased\_\_c | Dependent Picklist  (Controlling field = *Request Type*)  **Values:** Yes, No  **Default:**  All values are shown if *Request Type* = ‘Towing Company Complaint’ | No |  |  |  | Validation Rule #10, Workflow Rule #5 | No | Is the customer seeking a refund for a vehicle that has not been released? |
| Towing Business Name | TowingBusinessName\_\_c | Dependent Text(255)  (Controlling field = *Request Type*)  Field is enabled and required if *Request Type* = ‘Towing Company Complaint’  **Can this be determined automatically by the service address and GIS information? See Action Item #4.** | No |  |  |  | Validation Rule #11, | No | What is the name of the towing business? |
| Location Vehicle Towed From | LocationVehicleTowedFrom\_\_c | Dependent Text(255)  (Controlling field = *Request Type*)  Field is enabled and required if *Request Type* = ‘Towing Company Complaint’ | No |  |  |  | Validation Rule #12, | No | What is the location where the vehicle was towed from? |
| Towing Fees Complaint | TowingFeesComplaint\_\_c | Dependent Text(100)  (Controlling field = *Request Type*)  Field is enabled and required if *Request Type* = ‘Towing Company Complaint’ | No |  |  |  | Validation Rule #13 | No | If the customer complains about fees, what fees were charged? |
| Towing Company Hours of Operation | TowingCompanyHoursofOperation\_\_c | Dependent Text(100)  (Controlling field = *Request Type*)  Field is enabled and required if *Request Type* = ‘Towing Company Complaint’ | No |  |  |  | Validation Rule #14 | No | What are the hours of operation? (if known) |
| Zoning Permit | ZoningPermit\_\_c | Text(100) | Yes |  | This read-only field will be automatically populated from the GIS L&I Zoning layer associated with the GIS record selected as the Service Request Location. |  | None | No | The permits associated with the property. |
| Zoning License | ZoningLicense\_\_c | Text(100)  . | Yes |  | This read-only field will be automatically populated from the GIS L&I Zoning layer associated with the GIS record selected as the Service Request Location |  | None | No | The licenses associated with the property. |
| L&I District | L&IDistrict\_\_c | Text(50) | Yes |  | This read-only field will be automatically populated from the GIS L&I District layer associated with the GIS record selected as the Service Request Location |  | None | No | The L&I district in which the property is located. |
| L&I Address | L&IAddress\_\_c | Text(100) | Yes |  | This read-only field will be automatically populated from the GIS L&I District layer associated with the GIS record selected as the Service Request Location. |  | Workflow Rule #6 | No | The L&I address key, based on the entered service address. |

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| 2.1.3 Dependent Picklist |

**DEPENDENT Picklist Rule #1:**

Controlling field Name: Request Type

Dependent Field Name: Property Improperly Used as Residential

Values = Yes, No

Field is enabled and required if Request Type = ‘Property Used Without Proper Zoning’

**DEPENDENT Picklist Rule #2:**

Controlling field Name: Request Type

Dependent Field Name: Commercial or Residential

Values = Commercial, Residential

All values are shown if *Request Type* = ‘Property Used Without Proper Zoning’

**DEPENDENT Picklist Rule #3:**

Controlling field Name: Request Type

Dependent Field Name: Sign on Street Pole, Median or Curb

Values = Yes, No

All values are shown if *Request Type* = ‘Advertising Sign Complaint’

**DEPENDENT Picklist Rule #4:**

Controlling field Name: Request Type

Dependent Field Name: Honor Box Outside Regulated Area

Values = Yes, No

All values are shown if *Request Type* = ‘Honor Box Problem’

**DEPENDENT Picklist Rule #5:**

Controlling field Name: Request Type

Dependent Field Name: Honor Box Improperly Maintained

Values = Yes, No

All values are shown if *Request Type* = ‘Honor Box Problem’

**DEPENDENT Picklist Rule #6:**

Controlling field Name: Request Type

Dependent Field Name: Seeking Refund for Vehicle Not Released

Values = Yes, No

All values are shown if *Request Type* = ‘Towing Company Complaint’

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| 2.1.4 Force.com Objects |

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| --- | --- | --- |
| **Custom/Standard** | **Existing Objects** | **New Objects** |
| Standard | Case |  |
| Standard | Account |  |
| Standard | Contact |  |
| Custom | PKB Article Deflection |  |

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| 2.2 HIGH LEVEL SYSTEM PROCESS FLOW |



# 3 - NEW FUNCTIONALITY

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| 3.1 CONFIGURATION DETAILS |

**Case Record Type:** *Zoning Business*

Label: Zoning Business

Support Process: Zoning Business

Support Process Selected Values:

* New (Default)
* Open
* In-Progress
* Follow-up
* Closed

Record Type Name: Zoning Business

**Buttons:**

* Case Edit
  + Save
  + Save & Close
  + Cancel
* Case Detail
  + Edit
  + Delete
  + Close Case
  + Clone

**Tab Setup:**

**App Setup:**  Call Center Console

**User Profile Setup:**

* 311 Agents
* 311 Supervisors
* Case Workers
* System Administrators

**Permission Set Setup:** Please refer Profile & Permission Setup and Profile technical design.

**Role Hierarchy Considerations:** TBD

**Workflows:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Rule No** | **Rule Name** | **Workflow Action** | **Rule Criteria** | **Object** | **Evaluation Criteria** |
| 1 | Workflow Rule for *Property Improperly Used as Residential* | Display Message: “For a commercial property being used as RESIDENTIAL without proper zoning permits, submit a Zoning Residential service request.”  Automatically change the *Case Record Type* = ‘Zoning Residential’. | *Property Improperly Used as Residential* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 2 | Workflow Rule for *Sign on Street Pole, Median or Curb* | Display Message: “The City currently does not take these requests.”  Automatically change *Service Request Type* to “Service Not Needed’ and save the case.  Automatically assign the case and then close it with a *Close Reason* = “Service Not Needed”. | *Sign on Street Pole, Median or Curb* = ‘Yes’  Change Workflow Rule #2 to If “Yes” The City currently does not take requests for this” goes to Service Not needed.  You can remove Illegal Bandit Signs question from the pick list if the City is not handling because any signage on a pole, street or curb is considered illegal. | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 3 | Workflow Rule for *Honor Box Outside Regulated Area* | Display Message: “L&I only regulates honor boxes in certain locations.”  Automatically change *Service Request Type* to “Service Not Needed’ and save the case.  Automatically assign the case and then close it with a *Close Reason* = “Service Not Needed”. | *Honor Box Outside Regulated Area* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 4 | Workflow Rule for *Honor Box Improperly Maintained* | Display Message: “To file a complaint regarding improper maintenance, unlicensed or improperly placed honor boxes, enter an LI Request at 311HelpDesk so it can be processed by an L&I Subject Matter Expert.” | *Honor Box Improperly Maintained* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 5 | Workflow Rule for *Seeking Refund for Vehicle Not Released* | Display Message: “The Office of Consumer Affairs (OCA) receives complaints of consumer abuse and unfair commercial practices. Contact Consumer Advocate Lance Haver, City Hall Rm 167 215-686-7599.”  Automatically change *Service Request Type* to “Service Not Needed’ and save the case.  Automatically assign the case and then close it with a *Close Reason* = “Service Not Needed”. | *Seeking Refund for Vehicle Not Released* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 6 | Workflow Rule for *L&I* *Address (NULL)* | Display Message: “A zoning violation case can be submitted only if the exact L&I address key is validated.”  Automatically change *Service Request Type* to “Service Not Needed’ and save the case.  Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | *Address Key* returned from GIS is NULL | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |

**Approval Processes:**  None

**Reports & Dashboards:** None

**Validation Rules**

|  |  |  |  |
| --- | --- | --- | --- |
| **Rule #** | **Rule Name** | **Conditions** | **Message** |
| 1 | *Property Improperly Used as Residential* | Validation Rule for *Property Improperly Used as Residential* | The *Sign on Street Pole, Median or Curb* field must be populated (not NULL) if *Request Type* = ‘Property Used Without Proper Zoning’ |
| 2 | *Commercial or Residential* | Validation Rule for *Commercial or Residential* | The *Commercial or Residential* field must be populated (not NULL) if *Request Type* = ‘Property Used Without Proper Zoning’ |
| 3 | *Current Property Use* | Validation Rule for *Current Property Use* | The *Current Property Use* field must be populated (not NULL) if *Request Type* = ‘Property Used Without Proper Zoning’ |
| 4 | *Business Hours of Operation* | Validation Rule for *Business Hours of Operation* | The *Business Hours of Operation* field must be populated (not NULL) if *Request Type* = ‘Business Operating Without Proper License’ |
| 5 | *Business Type* | Validation Rule for *Business Type* | The *Business Type* field must be populated (not NULL) if *Request Type* = ‘Advertising Sign Complaint’ OR ‘Business Operating Without Proper License’ |
| 6 | *Sign on Street Pole, Median or Curb* | Validation Rule for *Sign on Street Pole, Median or Curb* | The *Sign on Street Pole, Median or Curb* field must be populated (not NULL) if *Request Type* = ‘Advertising Sign Complaint’ |
| 7 | *Sign Location* | Validation Rule for *Sign Location* | The *Sign Location* field must be populated (not NULL) if *Historical Building* = ‘Advertising Sign Complaint’ |
| 8 | *Honor Box Outside Regulated Area* | Validation Rule for *Honor Box Outside Regulated Area* | The *Honor Box Outside Regulated Area* field must be populated (not NULL) if *Request Type* = ‘Honor Box Problem’ |
| 9 | *Honor Box Improperly Maintained* | Validation Rule for *Honor Box Improperly Maintained* | The *Honor Box Improperly Maintained* field must be populated (not NULL) if *Request Type* = ‘Honor Box Problem’ |
| 10 | *Seeking Refund for Vehicle Not Released* | Validation Rule for *Seeking Refund for Vehicle Not Released* | The *Seeking Refund for Vehicle Not Released* field must be populated (not NULL) if *Request Type* = ‘Towing Company Complaint’ |
| 11 | *Towing Business Name* | Validation Rule for *Towing Business Name* | The *Towing Business Name* field must be populated (not NULL) if *Request Type* = ‘Towing Company Complaint’ |
| 12 | *Location Vehicle Towed From* | Validation Rule for *Location Vehicle Towed From* | The *Location Vehicle Towed From* field must be populated (not NULL) if *Request Type* = ‘Towing Company Complaint’ |
| 13 | *Towing Fees Complaint* | Validation Rule for *Towing Fees Complaint* | The *Towing Fees Complaint* field must be populated (not NULL) if *Request Type* = ‘Towing Company Complaint’ |
| 14 | *Towing Company Hours of Operation* | Validation Rule for *Towing Company Hours of Operation* | The *Towing Company Hours of Operation* field must be populated (not NULL) if *Request Type* = ‘Towing Company Complaint’ |

**Queue(s) :** *Zoning Business*

311 Contact Center

**Queue Members :** Zoning Business - **Hansen**

**Public Groups:** None

**Sharing Rules:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Rule Name** | **Criteria** | **Shared With** | **Access Level** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Custom Report Types:** None Defined

**Chatter Enabled Objects:** NONE

**Documents And Attachments** :

**Flow/Agent Instructions(Left side of the Layout)**:

|  |
| --- |
| * Purpose: To do any of the following: * Complain about advertising signs. * Complain about a towing company operating illegally. * Report honor boxes with maintenance issues or in an unauthorized location. * Report a sign erected without a zoning permit. * Report a zoning poster not posted as required by L&I. * Report a commercial property being used for other than what it is legally zoned. * Contact fields: Enter the name and contact information of the customer reporting the problem.   + Advise the customer that this information is requested in the event the department needs to obtain more information to follow up on this request.   + If the customer does not wish to leave their contact information, advise the customer that if the inspector cannot locate the issues identified, the case will have to be closed out.  Ask the customer, “Are you sure you want to submit this request anonymously?” * Service Address fields: Enter the exact, legal address of the property; the exact location or intersection where the honor box is located; the exact location of the sign; the exact, valid address of the towing business; or property address where the zoning poster should be posted.   + Verify that you entered the address correctly by repeating the address back to the customer. If the address does not verify in Hansen, advise the customer that “The system is unable to locate the property address. I am sorry this request cannot be processed if the system cannot find it.” * Description field: Describe the problem in detail. (Advertising sign complaint, business operating without proper license, honor box problem, property used without proper zoning, sign without permit attached to property, towing company complaint, zoning poster not posted.) * Advise the customer:   + Once a request is entered into the system the business should be inspected within 30 business days and if appropriate a violation(s) issued by L&I.   + Once a report about a zoning poster is entered into the system, the building should be inspected within 45 days and, if appropriate, violations will be issued.   + Accessory signs and advertising signs attached to buildings require a permit from L&I. Signs of this type without a permit are in violation of City Code.   + Honor boxes are vend racks or stands designed to hold FREE distribution publications such as newspapers, pamphlets and magazines. L&I regulates honor boxes ONLY in the following locations: The area bounded by and including the south side of Bainbridge street, the east side of Columbus boulevard, the north side of Vine street and the west side of the Schuylkill River; the entire length of the Benjamin Franklin Parkway; 1700 block of Cottman Avenue; Frankford Avenue from the 5900 block to the 7600 block, inclusive; Torresdale Avenue from the 5000 block to the 7600 block, inclusive; The Manayunk Area bounded by and including the Schuylkill River, the Wissahickon Creek between the Schuylkill River and the SEPTA Norristown Railroad line, the SEPTA Norristown Railroad line between the Wissahickon Creek and Cresson street, Cresson street, Baker street and Leverington avenue extended to the Schuylkill River.   + To get money back or if tow company will not release vehicle, Information Request: Advise Customer: The responsibilities of the Office of Consumer Affairs (OCA) include receiving complaints of consumer abuse and unfair commercial practices, working with the City's Law Department to determine which matters deserve investigation and referring those that do to the appropriate authorities; The OCA will also study issues related to insurance rates, utility rates and consumer prices and practices in Philadelphia; The Automobile Insurance Task Force will report to the OCA and the Office will have the authority to intervene in legal proceedings for the establishment or approval of changes in insurance rates; For help with a consumer affairs issue or to see if the office can help, contact Consumer Advocate Lance Haver, City Hall Rm 167 215-686-7599.   The following complaints regarding towing companies can be reported to L&I for inspection: Towing companies operating without a valid Commercial Activity License or valid Towing License; towing companies charging fees over what was set by City Council in towing legislation; towing companies that accept Cash Only, no credit cards; towing companies whose sign does not meet the standard set by new towing legislation. |

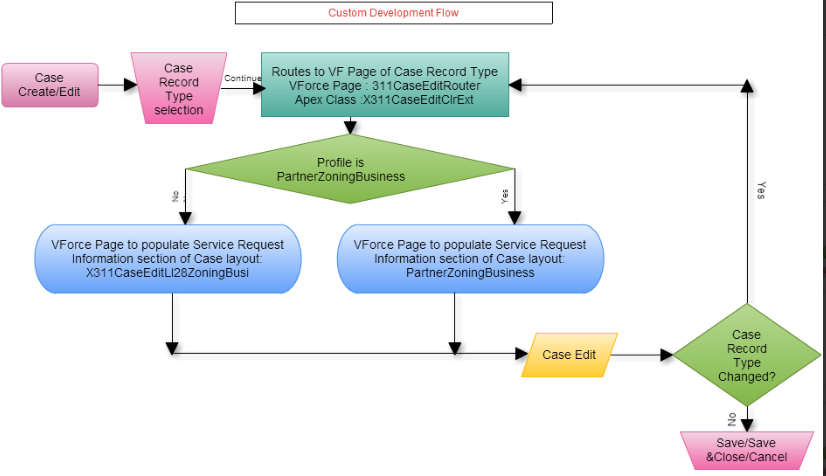
|  |
| --- |
| 3.2 DATA SHARING MODEL |

|  |  |  |  |
| --- | --- | --- | --- |
|  | ***User Types*** | ***Permission Sets*** | ***Public Groups*** |
| *LEVEL 1* |  |  |  |
| *LEVEL 2* |  |  |  |
| *LEVEL 3* |  |  |  |

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| 3.3 CUSTOM DEVELOPMENT DETAILS |

**Visualforce Pages**

* For Case Location Section in Case Detail: Create a VF Page which will use SR Location to depict Street,City,State in a Map.



**Custom Flow :** For standard button New/Edit button is replaced with a custom Visualforce Page **X311CaseEditRouter**. All the Visual force pages and related extensions are defined as follows.

**Visual Force Page : X311CaseEditRouter**

**Purpose:**  To route to SR specific Visual force page.

<apex:page standardcontroller="Case" extensions="X311CaseEditClrExt" action="{!redir}">

</apex:page>

**Apex Class : X311CaseEditClrExt**

public PageReference redir() {

* + - 1. Get current page parameters.
      2. Get the relevant Page depending on the Profile and Record Type(X311CaseEditLI28ZoningBusi or PartnerZoningBusiness)..
      3. Redirect to the page with parameters.

}

**Visual Force Page : X311CaseEditLI28ZoningBusiness**

<apex:page standardcontroller="Case">

<apex:composition template="X311CaseEdit">

<apex:define name="typeSpecific">

<apex:pageblocksection title="Service Request Information" showheader="true" collapsible="true" columns="2">

**SR ZONING BUSINESS SPECEFIC FIELDS**

</apex:pageblocksection>

</apex:define>

</apex:composition>

</apex:page>

**Visual Force Page : X311CaseEdit**

<apex:page standardcontroller="Case" extensions="X311CaseEditClrExt">

<apex:pageblock mode="edit">

<apex:pageblocksection title="Department Details">

</apex:pageblocksection>

<apex:pageblocksection title="Case Information">

</apex:pageblocksection>

<apex:pageblocksection title="Service Request Location">

</apex:pageblocksection>

<apex:inputTextArea id="caseInternalComments" >

</apex:pageblocksection>

<apex:pageblocksection title="Description Information">

</apex:pageblocksection>

<apex:pageblock>

</apex:page>

**Visual Force Page : PartnerZoningBusiness**

<apex:page standardcontroller="Case" extensions="X311CaseEditClrExt">

<apex:pageblock mode="edit">

<apex:pageblocksection title="Department Details">

</apex:pageblocksection>

<apex:pageblocksection title="Case Information">

</apex:pageblocksection>

<apex:pageblocksection title="Service Request Location">

</apex:pageblocksection>

<apex:inputTextArea id="caseInternalComments" >

</apex:pageblocksection>

<apex:pageblocksection title="Service Request Information" showheader="true" collapsible="true" columns="2">

SR ZONING BUSINESS SPECEFIC FIELDS

</apex:pageblocksection>

<apex:pageblocksection title="Description Information">

</apex:pageblocksection>

<apex:pageblock>

</apex:page>

**Triggers**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Trigger Name** | **Parent**  **Object** | **Child**  **Object** | **Trigger**  **Event** | **Operation**  **Type** | **Description** |
| CalculateBusinessHoursAges | Case |  | Before update | Insert | Calculates the total business hours between when a case was opened and when it was closed and then populates “Case Age in Business Hours” field, which is displayed in the “Age to Close in Business Hours” field shown within the “Resolution Information” section of the case |
| Account\_Name\_Update | Contact |  | Before update | Insert | When a new Contact is created during the case creation process, the system does not allow for an Account to be associated to the Contact, yet Account is a required field for a Contact. Whenever a new Contact is created without an Account, this trigger will associate the Account record with Name = “City of Philadelphia” to the Contact record |

**Apex Code:**

**Force.com sites:**

**Javascript:**

**Web Service/API Code:**

**Customer Portals:**

**Communities:** Community Partner Self-Service Portal

**Site.com:**

**Third Party Applications:**  Survey Force, Sales for Social Media & Call Center Console

**Other**

**Layout:** TBD

<>

Related Lists :

* Solutions
* Open Activities
* Activity History
* Case Comments
* Case History
* Attachments

# 4 – STANDARD CASE FIELDS

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| 4.1 DEPARTMENT DETAILS SECTION |

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Unique** | **Read Only** | **External ID** | **Validation** | **History** | **Comments** |
| Type | Type | Picklist  **Values:** Service Request Type, Information Request Type, Directory Services | N | Service Request Type | Y |  | N | N | None | Y | Field is initially auto-populated based on the Case Record Type being created. If this value is manually changed, it will result in a new Field Layout based on the new Case Record Type. |
| Department | Department\_\_c | Picklist  **Values:** License & Inspection | Y | Service Request Type | Y |  | N |  | None | N | Department will be automatically set based on Service Request Type. For an Information Request, this field will be automatically populated by the article. For Directory Services the field will default to 311 Services. |
| Service Request Type | Service\_Request\_Type\_\_c | Picklist  **Values:** | Y | None | Y |  | N |  | None | Y | This field is initially auto-populated based on the Case Record Type chosen when creating the case. If this value is changed, it could result in a new Field Layout based on the new Case Record Type chosen.  If any value in the Other Case Information systems indicates that this should not be forwarded to another department as a Service Request, a value of “Request Not Required” will be assigned to this field, which will indicate that the Case should be closed upon save without being assigned to a queue. |

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| 4.2 CASE DETAIL/INFORMATION SECTION |

**NOTE :** Section Header has to be “Case Information” in the layout when case is created or opened for modification. Other wise, Section Header is “Case Detail” .

| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Unique** | **Read Only** | **External ID** | | **Validation** | **History** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Case Owner | Owner | Lookup(User,Queue) | N |  | N |  | N | N | None | | Y | When a case is created this field is set to the User creating the case. Upon save, the Standard Case Assignment Rule is executed and this field is updated to a Queue based on the case’s Service Request Type. Once the case is saved this field can be manually changed by a user. |
| Case Number | CaseNumber | Auto Number | N |  | N | Y | Y | N | None | | N | The system automatically populates this field when a case is created. |
| Caller Zip Code | Caller\_zip\_code\_\_c | Lookup(Contact) | Y |  | Y |  | N | N | None | | Y | This field will be populated by the Zip Code in the Contact record if one is associated with the case, otherwise the agent may populate it with a number from the caller. |
| Contact Name | Contact | Lookup(Account) | N |  | N |  | N | N | None | | Y | This field contains the Contact requesting the service. Ideally every case should have an associated contact. |
| Account Name | Account | Lookup(Account) | N |  | N |  | N | N | None | | N | This field contains the Account associated with the Contact record. |
| Parent Case | Parent | Lookup(Account) | N |  | N |  | N | N | None | | N | Two cases can be associated to each other via a parent/child relationship. This field identifies the “Parent” case. “Child” cases are displayed in the “Related Cases” Related List section for the “Parent” case. |
| Case Origin icon | Origin | Formula(Text) | Y |  | N |  | Y | N | None | | N | Shows an image representing the value in the Case Origin field. The formula for this field is: IMAGE(  CASE( Origin,  "Email", "https://<SalesforceOrg>.content.force.com/servlet/servlet.FileDownload?file=015K0000000238q",  "Phone", "https://<SalesforceOrg>.content.force.com/servlet/servlet.FileDownload?file=015K0000000238R",  "Web", "https://<SalesforceOrg>.content.force.com/servlet/servlet.FileDownload?file=015K000000023QL",  "/s.gif"),  "Origin Flag") |
| Contact Phone | ContactPhone | Phone | N |  | N |  | Y | N | None | | N | This display-only field is from the “Phone” field on the Contact record associated to the case. |
| Contact Email | ContactEmail | Email | N |  | N |  | Y | N | None | | N | This display-only field is from the “Email” field on the Contact record associated to the case. |
| Status | Status | Picklist  **Values:** On Hold, Escalated, Closed, New, In-Progress | N | New | Y |  | N | N | None | | Y | This required field defines the status of the case.   * “New” is the default value when creating a case. * All values except “Closed” are available when creating or editing a case.   “Closed” is the only value that can be selected when the “Close Case” button is used. |
| Case Origin | Origin | Picklist  **Values:** Email, Phone, Web | N | Phone |  | Y | N | N | None | | Y | This optional field provides the in-depth description of the case. |
| Priority | Priority | Picklist  **Values:** 1,2,3,4,5,6,7,8,9 | N | 5 |  | N | N | N | None | | N | This field allows a user to easily create a Comment while creating or editing a case. The data entered in this field will be used by the system to create a Comment record that will be displayed in the “Case Comments” Related List section of the case. |

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| 4.3 SERVICE REQUEST LOCATION SECTION |

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| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Unique** | **Read Only** | **External ID** | **Validation** | **History** | **Comments** |
| Street | Street\_\_c | Text(255) | Y |  | N |  | N |  |  |  | Street of the Service Request Location. Also see Standard Workflow Rules. |
| City | City\_\_c | Text(255) | Y |  | N |  | N |  |  |  | City of the Service Request Location. Also see Standard Workflow Rules. |
| State | State\_\_c | Text(255) | Y |  | N |  | N |  |  |  | State of the Service Request Location. Also see Standard Workflow Rules. |

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| 4.4 CASE LOCATION SECTION |

Defined in GIS Integration Detailed Design Document.

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| 4.5 DESCRIPTION INFORMATION SECTION |

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| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Read Only** | **External ID** | **Validation** | **History** | **Comments** |
| Subject | Subject | Text(255) | N |  | Y | N |  |  | Y | If this field is populated when creating a new case, the system will find and display Knowledgebase Articles using the content in the “Subject” field. |
| Description | Description | Long Text Area(32000) | N |  | Y | N |  |  | Y | This optional field provides the in-depth description of the case. |
| Internal Comments | Comments | Text Area(4000) | N |  | N | N |  |  | N | This field allows users to enter a Comment while creating or editing a case. Data entered in this field will be used by the system to create a Comment record that will be displayed in the “Case Comments” Related List section of the case. |

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| 4.6 RESOLUTION INFORMATION SECTION |

NOTE: Case Detail page have these fields only be populated if the case is “closed”.

| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Read Only** | **External ID** | **Validation** | **History** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Close Reason | Close\_Reason\_\_c | Formula (Text) Formula : TEXT(Reason) | Y |  | N | Y |  |  | N |  |
| Resolution Description | Resolution\_Description\_\_c | Formula (Text) Formula : TEXT(Issue\_Resolution\_\_c) | Y |  | N | Y |  |  | N |  |
| Date/Time Closed | ClosedDate | Date/Time | N |  | N | Y |  |  | N |  |
| Age to Close in Business Hours | Age\_to\_Close\_in\_Business\_Hours\_\_c | Formula(Number) | Y |  | N | Y |  |  | N | CalculateBusinessHoursAges trigger would update this field |
|  |  |  |  |  |  |  |  |  |  |  |

NOTE: Following fields is shown in Resolution Info section.

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| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Read Only** | **External ID** | **Validation** | **History** | **Comments** |
| Case Age in Business Hours | Case\_Age\_In\_Business\_Hours\_\_c | Number(15,3) | N |  | N | Y |  |  | Y | CalculateBusinessHoursAges trigger would update this field |
| Case Reason | Reason | Picklist Values: Emergency Call, Invalid, Other, Question Answered | N | Question Answered | Y | N |  |  | Y |  |
| Issue Resolution | Issue\_Resolution\_\_c | Text Area(255) | Y |  | N | N |  |  | Y |  |

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| 4.6 WEB INFORMATION SECTION |

NOTE: Section is shown only when the case is created through social media channels.

| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Read Only** | **External ID** | **Validation** | **History** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Web Email | SuppliedEmail | Email | N |  | N | Y |  |  | N |  |
| Web Name | SuppliedName | Text(80) | N |  | N | Y |  |  | N |  |
| Web Company | SuppliedCompany | Text(80) | N |  | N | Y |  |  | N |  |
| Web Phone | SuppliedPhone | Text(40) | N |  | N | Y |  |  | N |  |

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| 4.7 SYSTEM INFORMATION SECTION | | | | | | | |
| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Read Only** | **External ID** | | **Validation** | **History** | **Comments** |
| Created By | CreatedBy | Lookup(User) | N |  | N | Y |  | |  | N |  |
| Last Modified By | LastModifiedBy | Lookup(User) | N |  | N | Y |  | |  | N |  |

Additional comments: