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| **Philly CRM 311**  **Technical Design – Complaint**  **V1.7** |
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# REVISION HISTORY

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| --- | --- | --- | --- |
| **Revision Number** | **Revision Date** | **Summary of Changes** | **Author** |
| 1.7 | 03/11/2014 | This document is based off the requirements document “SR-ST08 Complaint Requirements Definition” | Anne Egan |

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# 2 – SERVICE REQUEST INFORMATION

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| **Case Record Type :** | Complaint |
| **Service Request ID** | SR-ST08: Complaint |
| **Service Request Type** | Complaint |
| **Department** | Streets |

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| 2.1 ENTITY RELATIONSHIP DIAGRAM |



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| 2.1.1 CASE STANDARD FIELDS FOR STREETS |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **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: 1,2,3,4,5,6,7,8,9 | Yes | No | 5 | No | None | Yes |  |

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| 2.1.2 CASE ADDITIONAL FIELDS |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Field Label** | **Field Name** | **Data Type** | **Required** | **Unique** | **Default Value** | **External ID** | **Rule #** | **History** | **Field Help Text** |
| Previous Case | PreviousCase\_\_c | Picklist  Values: Yes, No | Yes |  |  |  | Workflow Rule #1 | No | Does this relate to a previously submitted case? |
| Previous Case found | PreviousCasefound\_\_c | Dependent Picklist  (If *Previous Case* = ‘Yes’)  **Values**: Yes, No | Yes |  | No |  | Workflow Rule #2 | No | Can the previous Case be found? |
| Type of Feedback (Comments) | TypeofFeedback (Comments) \_\_c | Picklist  Values: Compliment, Complaint | Yes |  |  |  |  | No | Gather information on the feedback (Compliment/Complaint) |
| Rubbish Issue | RubbishIssue\_\_c | Dependent Picklist  (If *Type of Feedback* = ‘Yes’)  **Values**: No, Missed, Noise, Other |  |  |  |  | Workflow Rule #3  Workflow Rule #4  Workflow Rule #5 |  | Does the complaint involve a missed pickup, private dumpsters, sanitation vehicle noise, or another complaint dealing with sanitation? |
| Property Loss Claim | PropertyLossClaim\_\_c | Dependent Picklist  (If *Type of Feedback* = ‘Yes’)  **Values:** Yes, No | No |  |  |  | Workflow Rule #6 | No | Is this contact about a property loss claim? |

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| 2.1.3 Dependent Picklist |

**DEPENDENT Picklist Rule #1:**

Controlling field Name:

Dependent Field Name: Previous Case

Values = Yes, No

**DEPENDENT Picklist Rule #2:**

Controlling field Name: Type of Feedback (If *Type of Feedback* = ‘Yes’)

Dependent Field Name: Rubbish Issue

Values = No, Missed, Noise, Other

**DEPENDENT Picklist Rule #3:**

Controlling field Name: Type of Feedback (If *Type of Feedback* = ‘Yes’)

Dependent Field Name: Property Loss Claim

Values = Yes, No

|  |
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| 2.1.4 Force.com Objects |

|  |  |  |
| --- | --- | --- |
| **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 |

**Record Types :** *Complaint*

**Case Record Type:** *Complaint*

Label: Complaint

Support Process: Case Support Process

Support Process Selected Values:

* New
* In-Progress
* Escalated
* On-Hold
* Closed

Record Type Name: Complaint

**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** | **Action** | **Rule Criteria** | **Object** | **Evaluation Criteria** |
| --- | --- | --- | --- | --- | --- |
| 1 | Workflow Rule for *Previous Case* | Display Message: “Try to locate previous case based on Case Number, Contact Name, or Service Request Location amend the previous case. If the case has been closed but not resolved, change status to *Redress*” | *Previous Case* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 2 | Workflow Rule for *Previous Case found* | Display Message: “Proceed with previous case. This case will be closed.”  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”. | *Previous Case found* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 3 | Workflow Rule for *Rubbish Issue* = ‘Noise’ | Display Message: “Advise constituent to contact the Health Department at 215-685-7580.”  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”. | *Rubbish Issue* = ‘Noise’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 4 | Workflow Rule for *Rubbish Issue* = ‘Missed’ | Display message: “The system has changed the Case Record Type to Rubbish Collection.”  Automatically change the *Case Record Type* = ‘Rubbish Collection’ | *Rubbish Issue* = ‘Missed’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 5 | Workflow Rule for *Rubbish Issue* = ‘Other’ | Display message: “The system has changed the Case Record Type to Streets - Other.”  Automatically change the *Case Record Type* = ‘Streets - Other’ | *Rubbish Issue* = ‘Other’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 6 | Workflow Rule for *Property Loss Claim* | Display Message: “For a property loss claim, contact the Claims Unit in the Office of Risk Management (215) 683-1700--**NOT** the Law Department.”  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”. | *Property Loss Claim* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |

**Approval Processes:**

**Reports & Dashboards:**

**Validation Rules**: None

**Queues :** Streets – Other

311 Contact Center

**Queue Members :** TBD

**Public Groups:**

**Sharing Rules:**

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

**Custom Report Types:**

**Chatter Enabled Objects:**

**Documents And Attachments** :

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

|  |
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| * **Purpose**: To give the Streets Department feedback – either a compliment or a complaint. * **Contact fields**: Enter the customer’s name and contact information. * **Service Address fields**: Enter the address related to the compliment or complaint. Stress that these fields are required for the Streets Department to contact the caller. * **Description field**: Describe the complaint or compliment for the Streets Department. * **Advise the customer**:   + This information will be forwarded to the Streets department for review.   + If the Customer has left their Contact information, the Streets Department may contact them for further follow-up. |

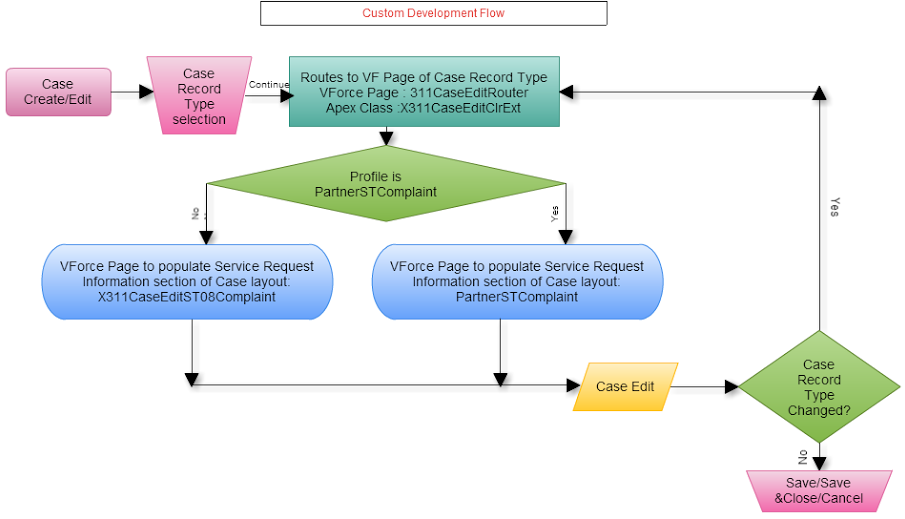
|  |
| --- |
| 3.2 DATA SHARING MODEL |

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| --- | --- | --- | --- |
|  | ***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(X311CaseEditST08Complaint or PartnerSTComplaint)..
      3. Redirect to the page with parameters.

}

**Visual Force Page : X311CaseEditST08Complaint**

<apex:page standardcontroller="Case">

<apex:composition template="X311CaseEdit">

<apex:define name="typeSpecific">

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

**COMPLAINT 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 : PartnerSTComplaint**

<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">

**COMPLAINT SPECEFIC FIELDS**

</apex:pageblocksection>

<apex:pageblocksection title="Description Information">

</apex:pageblocksection>

<apex:pageblock>

</apex:page>

|  |  |  |
| --- | --- | --- |
| **Trigger Name** | **Object** | **Description** |
| CalculateBusinessHoursAges | Case | 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 | 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 Hampton” to the Contact record |

**Apex Code:**

**Force.com sites:**

**Javascripts:**

**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 :

* Articles
* Related Cases
* 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:** Neighborhood Services | 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  **Value<>s:** | Y |  | 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. Otherwise, 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 |

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **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.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **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 |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 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: