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| **Philly CRM 311**  **Technical Design – Street Trees**  **V1.0** |
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# REVISION HISTORY

|  |  |  |  |
| --- | --- | --- | --- |
| **Revision Number** | **Revision Date** | **Summary of Changes** | **Author** |
| Draft | 04/30/2014 | Created Draft based on 1.2 of SR | Murugaboopathi |
| 1.0 | 05/01/2014 | Modified based on the Design Review | Murugaboopathi |

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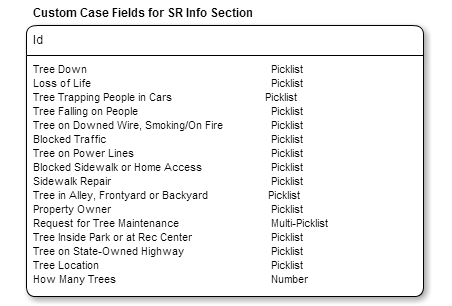
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# 2 – SERVICE REQUEST INFORMATION

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| **Case Record Type :** | Street Trees |
| **Service Request ID** | SR-PR08 Street Trees |
| **Service Request Type** | Street Trees |
| **Department** | Parks & Recreation |

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| 2.1 ENTITY RELATIONSHIP DIAGRAM |





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| 2.2.1 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,Mediuem and Low | Yes | No | Medium | No | None | Yes |  |

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| 2.2.2 CUSTOM FIELDS |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Field Label** | **Field Name** | **Data Type** | **Required** | **Unique** | **Default Value** | **External ID** | **Rule #** | **History** | **Help Text** |
| Tree Down | Tree\_Down\_\_c | Picklist  **Values:** Yes, No  **Default:** | Yes |  |  |  | None | No | Is the tree down? |
| Loss of Life | Loss\_of\_Life\_\_c | DEPENDENT Picklist  (Controlling field = *Tree Down*)  Values = Yes, No  All values are shown if *Tree Down* = ‘Yes’ | No |  |  |  | Workflow Rule #1 | No | Has the tree caused a loss of life? |
| Tree Trapping People in Cars | Tree\_Trapping\_People\_in\_Cars\_\_c | DEPENDENT Picklist  (Controlling field = *Tree Down*)  Values = Yes, No  All values are shown if *Tree Down* = ‘Yes’ | No |  |  |  | Workflow Rule #1 | No | Is the tree trapping people in cars? |
| Tree Falling on People | Tree\_Falling\_on\_People\_\_c | DEPENDENT Picklist  (Controlling field = *Tree Down*)  Values = Yes, No  All values are shown if *Tree Down* = ‘Yes’ | No |  |  |  | Workflow Rule #1 | No | Is the tree failing on people? |
| Tree on Downed Wire, Smoking/On Fire | Tree\_on\_Downed\_Wire\_Smoking\_On\_Fire\_\_c | DEPENDENT Picklist  (Controlling field = *Tree Down*)  Values = Yes, No  All values are shown if *Tree Down* = ‘Yes’ | No |  |  |  | Workflow Rule #1 | No | Is the tree on a downed wire which is smoking or on fire? |
| Blocked Traffic | Blocked\_Traffic\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #2, Workflow Rule #3 | No | Is the tree blocking traffic? |
| Tree on Power Lines | Tree\_on\_Power\_Lines\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #4 | No | Is the tree on power lines or did the tree knock down power lines? |
| Blocked Sidewalk or Home Access | Blocked\_Sidewalk\_or\_Home\_Access\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #5 | No | Are fallen trees or tree limbs blocking the sidewalk or access to a home? |
| Sidewalk Repair | Sidewalk\_Repair\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #6 | No | Is the request to repair a sidewalk disturbed by a street tree? |
| Tree in Alley, Frontyard or Backyard | Tree\_in\_Alley\_Frontyard\_or\_Backyard\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | None | No | Is the tree in an alley, frontyard, or backyard? |
| Property Owner | Property\_Owner\_\_c | DEPENDENT Picklist  (Controlling field = *Tree in Alley, Frontyard or Backyard*)  Values = Yes, No  All values are shown if *Tree in Alley, Frontyard or Backyard* = ‘Yes’ | No |  |  |  | Workflow Rule #7, Workflow Rule #8 | No | Is the customer the owner of the property on which the tree is located? |
| Request for Tree Maintenance | Request\_for\_Tree\_Maintenance\_\_c | Multi-Picklist  **Values:** New Tree, Pruning, Removal, Other | Yes |  |  |  | None | No | Is the customer requesting a tree to be planted, pruned, or removed? |
| Tree Inside Park or at Rec Center | Tree\_Inside\_Park\_or\_at\_Rec\_Center\_\_c | Picklist  **Values:** Yes, No | Yes |  | Autopopulated based on the service address and GIS. |  | Workflow Rule #9 | No | Is the request for a tree to be planted, pruned, or removed inside a park or at a recreation center? |
| Tree on State-Owned Highway | Tree\_on\_State\_Owned\_Highway\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #10 | No | Is the request for a tree to be plantned, pruned, or removed on a state-owned highway? |
| Tree Location | Tree\_Location\_\_c | Picklist  **Values:** Between Sidewalk and Curb, On Side Street, In Median, Private Property | Yes |  |  |  | Workflow Rule #11 | No | What is the location of the tree to be planted, pruned, or removed? |
| How Many Trees | How Many Trees | Number | Yes |  |  |  | None | No | How many trees are being reported? |

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| 2.2.3 Dependent Picklist |

**Dependent Picklist Rule #1:**

Controlling field Name: Tree Down

Dependent Field Name: Loss of Life

Values: Yes, No

All values are shown if Tree Down = ‘Yes’

**Dependent Picklist Rule #2:**

Controlling field Name: Tree Down

Dependent Field Name: Tree Trapping People in Cars

Values: Yes, No

All values are shown if Tree Down = ‘Yes’

**Dependent Picklist Rule #3:**

Controlling field Name: Tree Down

Dependent Field Name: Tree Falling on People

Values: Yes, No

All values are shown if Tree Down = ‘Yes’

**Dependent Picklist Rule #4:**

Controlling field Name: Tree Down

Dependent Field Name: Tree on Downed Wire, Smoking/On Fire

Values: Yes, No

All values are shown if Tree Down = ‘Yes’

**Dependent Picklist Rule #5:**

Controlling field Name: Tree in Alley, Frontyard or Backyard

Dependent Field Name: Property Owner

Values: Yes, No

All values are shown if Tree Down = ‘Yes’

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| 2.2.4 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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| 2.3 HIGH LEVEL SYSTEM PROCESS FLOW |



3 - NEW FUNCTIONALITY

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| 3.1 CONFIGURATION DETAILS |

**Case Record Type:** Street Trees

Label: Street Trees

Support Process: Street Trees Support Process

Support Process Selected Values:

* New (Default)
* In-Progress
* Escalated
* On-Hold
* Closed (Closed)

Record Type Name: Street Trees

**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 #** | **Rule Name** | **Workflow Action** | **Rule Criteria** | **Object** | **Evaluation Criteria** |
| 1 | Workflow Rule for *Tree Down* | Display Message: “Hot transfer the customer to 911.”  Automatically change the *Case Record Type* to “Emergency Transfer” and close case. | Loss of Life = ‘Yes’ OR Tree Trapping People in Cars = ‘Yes’ OR Tree Falling on People = ‘Yes’ OR Trees on Downed Wire, Smoking/On F = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 2 | Workflow Rule for *Blocked Traffic (911)* | Display Message: “Hot transfer the customer to 911.”  Automatically change the *Case Record Type* to “Emergency Transfer” and close case. | Blocked Traffic = ‘Yes’ AND << GIS specifies highway/major road | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 3 | Workflow Rule for *Blocked Traffic (Radio)* | Display the message: “Contact PECO at 800-84 1-4141 and describe the incident to them.”  Add the request to the Supervisor Queue for the supervisor to call Municipal Radio.  Automatically change *Service Request Type* to “Service Not Needed’ and save the case.  Automatically assign the case. Do NOT close the case. Leave the status Open. | Blocked Traffic = ‘Yes’ AND << GIS specifies this is NOT a highway/major road – | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 4 | Workflow Rule for *Tree on* *Power Lines* | Display the message: “Contact PECO at 800-841-4141 and describe the incident to them.”  Add the request to the Supervisor Queue for the supervisor to call Municipal Radio.  Automatically change *Service Request Type* to “Service Not Needed’ and save the case.  Automatically assign the case. Do NOT close the case. Leave the status Open. | *Tree on* *Power Lines* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 5 | Workflow Rule for *Blocked Sidewalk or Home Access* | Display Message: “Call Municipal Radio for assistance with dispatching Street Tree Crews.”  Add the request to the Supervisor Queue for the supervisor to call Municipal Radio.  Automatically change *Service Request Type* to “Service Not Needed’ and save the case.  Automatically assign the case. Do NOT close the case. Leave the status Open. | *Blocked Sidewalk or Home Access* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 6 | Workflow Rule for *Sidewalk Repair* | Display Message: “Sidewalk repair is the property owner’s responsibility. Change the case record type to Dangerous Sidewalk.”  Automatically change the *Case Record Type* to “Dangerous Sidewalk”. | *Sidewalk Repair* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 7 | Workflow Rule for *Property Owner (Yes)* | Display Message: “Trees that are located in a alley or in a frontyard/backyard are not the City's responsibility.  It is the responsibility of the property owner, regardless of the situation.”  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”. | *Tree in Alley, Frontyard or Backyard* = ‘Yes’ AND *Property Owner* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 8 | Workflow Rule for *Property Owner (No)* | Display Message: “If the tree is located in an alley or in a frontyard/backyard but do not belong to the property owner, submit a Maintenance Residential or Commercial service request.”  Automatically change the *Case Record Type* to “Maintenance Residential or Commercial”. | *Tree in Alley, Frontyard or Backyard* = ‘Yes’ AND *Property Owner* = ‘No’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 9 | Workflow Rule for *Tree Inside Park or at Rec Center* | Display Message: “If the tree is in a park or at a recreation center, submit a Parks and Rec Safety and Maintenance service request.”  Automatically change the *Case Record Type* to “Parks and Rec Safety and Maintenance”. | Workflow Rule for Tree *Inside Park or at Rec Center* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 10 | Workflow Rule for *Tree on State-Owned Highway* | Display the message: “Contact PennDOT at (717) 214-4035 and describe the tree maintenance request to them.”  Automatically change *Service Request Type* to “Service Not Needed’ and save the case.  Automatically assign the case. Do NOT close the case. Leave the status Open. | *Tree on State-Owned Highway* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 11 | Workflow Rule for *Tree Location* | Display Message: “A tree may be planted, pruned, or removed ONLY if it is located between the sidewalk an curb, in the grass planting strip immediately adjacent to curb, or in the median.”  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”. | *Tree Location* = ‘Other’ |  | Evaluate the rule when a record is created, and every time it’s edited. |

**Approval Processes:**  None

**Reports & Dashboards:** None

**Validation Rules**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Rule No** | **Rule Name** | **Conditions** | **Message** | **Comments** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Queue(s) :** Street Trees

**Queue Members : TBD**

**Email Notifications:** if the Agent is selected “Send Notification Email to Contact” checkbox then send Email to Contact using “Case Creation” template.

**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)**:

|  |
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| * Purpose: To request removing, pruning, or planting a tree beside a street. * Contact fields: Enter the the customer’s name, address and contact information.   + 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 department 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 address associated with the tree.   + Verify that you entered the address correctly by repeating the address back to the customer. * Description field: Enter any additional information about the location or problems with the tree, or the description of the tree. * For non-emergency situations, advise the customer:   + Once a request is entered into the system the Fairmount Park Street Tree Office will inspect the site within 15 business days.  All tree work is prioritized based on condition of tree, date added to the list as well as resources available. Removal: 12-18 months. Pruning: 18-24 months. Planting: Spring (between March and June) or Fall (between October and January) but no other time of the year.   + If the customer has already entered a case, the tree has already been inspected and they have received a letter confirming, Street Tree Management will provide no further follow up information, no exact dates and customer must wait until service takes place. Do not take another case for the same tree issue.   If escalation is required due to dissatisfaction with the street tree management service, or not receiving a confirmation, escalate to a Philly311 Supervisor. |

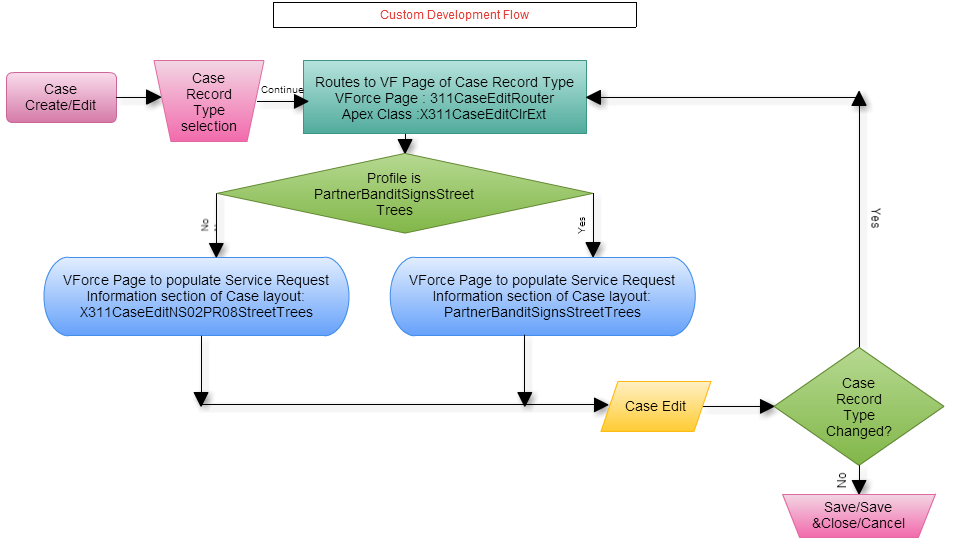
|  |
| --- |
| 3.2 DATA SHARING MODEL |

|  |  |  |  |
| --- | --- | --- | --- |
|  | ***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(X311CaseEditNS01Graffiti or PartnerGraffitiRemoval)..
      3. Redirect to the page with parameters.

}

**Visual Force Page : X311CaseEditNS02PR08StreetTrees**

<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 Street Trees 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 : PartnerPoliceDepartment**

<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 PartnerBanditSignsStreetTreesSPECEFIC 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:** 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  **Values:** Graffiti Removal | Y | Graffiti Removal | 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 |

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **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: