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| **Philly CRM 311**  **Technical Design – Inlet Cleaning**  **V1.0** |
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# REVISION HISTORY

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| --- | --- | --- | --- |
| **Revision Number** | **Revision Date** | **Summary of Changes** | **Author** |
| Draft | 01/24/2014 | Created Draft | Murugaboopathi |
| 1.0 | 05/07/2014 | Based on SR 1.6 | Murugaboopathi |

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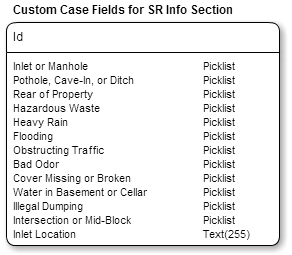
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# 2 – SERVICE REQUEST INFORMATION

|  |  |
| --- | --- |
| **Case Record Type :** | Inlet Cleaning |
| **Service Request ID** | SR-WD01 Inlet Cleaning |
| **Service Request Type** | Inlet Cleaning |
| **Department** | Water |

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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, Medium, 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** |
| Inlet or Manhole | Inlet\_or\_Manhole\_\_c | Picklist  **Values:** Inlet, Manhole | Yes |  | Inlet |  | Workflow Rule #1 | No | Is the report regarding an inlet or manhole? An inlet is on the curb. A manhole is in the middle of the right of way. |
| Pothole, Cave-In, or Ditch | Pothole\_Cave\_In\_or\_Ditch\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #2 | No | Is the report regarding an inlet or manhole? |
| Rear of Property | Rear\_of\_Property\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #3 | No | Is the problem in the rear of a property? |
| Hazardous Waste | Hazardous\_Waste\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #4 | No | Reports of oil or fuel dumping into an inlet or manhole, pumping of any fluids (including water) to the street/inlet, or any activity that may impact the waterways, collection system, sewage treatment plant, or drinking water supply. |
| Heavy Rain | Heavy\_Rain\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #5 | No | Is it raining heavily? |
| Flooding | Flooding\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #5 | No | Is it flooding at intersection? |
| Obstructing Traffic | Obstructing\_Traffic\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #5 | No | Is it obstructing traffic? |
| Bad Odor | Bad\_Odor\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #5 | No | Is there a bad odor coming from the inlet? |
| Cover Missing or Broken | Cover\_Missing\_or\_Broken\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #5 | No | Is the cover missing or broken? |
| Water in Basement or Cellar | Water\_in\_Basement\_or\_Cellar\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #5 | No | Is it causing water in the basement or the cellar? |
| Illegal Dumping | Illegal\_Dumping\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #5 | No | Is someone illegally dumping into a City inlet or sewer? |
| Intersection or Mid-Block | Intersection\_or\_Mid\_Block\_\_c | Picklist  **Values:** Intersection, Mid-Block. | Yes |  | Autopopulated based on service address and GIS information |  | None | No | Intersection or mid-block? |
| Inlet Location | Inlet\_Location\_\_c | Text(255)  . | Yes |  | Autopopulated based on service address and GIS information |  | None | No | Based on the GIS information, what is the location of the inlet(s) to be cleaned? |

|  |
| --- |
| 2.2.3 Dependent Picklist |

**None.**

|  |
| --- |
| 2.2.4 Force.com Objects |

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

|  |
| --- |
| 2.3 HIGH LEVEL SYSTEM PROCESS FLOW |



# 3 - NEW FUNCTIONALITY

|  |
| --- |
| 3.1 CONFIGURATION DETAILS |

**Case Record Type:** *Inlet Cleaning*

Label: Inlet Cleaning

Support Process: Inlet Cleaning

Support Process Selected Values:

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

Record Type Name: Inlet Cleaning

**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** | **Evaluation Criteria** |
| 1 | Workflow Rule for *Inlet or Manhole* | Display message: “The system has changed the Case Record Type to Manhole Cover.”  Automatically change the *Case Record Type* = ‘Manhole Cover’. | *Inlet or Manhole* = ‘Manhole” | Evaluate the rule when a record is created, and every time it’s edited. |
| 2 | Workflow Rule for *Pothole, Cave-In, or Ditch* | Display message: “The system has changed the Case Record Type to Pothole Repair.”  Automatically change the *Case Record Type* = ‘Pothole Repair’. | *Pothole, Cave-In, or Ditch* =’Yes’ | Evaluate the rule when a record is created, and every time it’s edited. |
| 3 | Workflow Rule for *Rear of Property* | Display message: “The system has changed the Case Record Type to Maintenance Residential or Commercial.”  Automatically change the *Case Record Type* = ‘Maintenance Residential or Commercial’. | *Rear of Property* = ‘Yes’ | Evaluate the rule when a record is created, and every time it’s edited. |
| 4 | Workflow Rule *Hazardous Waste* | Report the request to Municipal Radio (215) 686-4514 or 4515 for investigation by the Industrial Waste Unit. The report should include: (1) name and telephone number of the complainant, (2) street address of the incident, and (3) time the incident was witnessed. | *Hazardous Waste* = ‘Yes’ | Evaluate the rule when a record is created, and every time it’s edited. |
| 5 | Workflow Rule for Compliance Questions | Transfer the customer to PWD Customer Service at (215) 685-6300. | <Compliance criteria factor> = ‘Yes’ | 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** |
|  |  |  |  |

**Queue(s) :**

*Inlet Cleaning*

**Queue Conditions:**

**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)**:

|  |
| --- |
| Purpose: To request cleaning for a clogged inlet (sewer) or storm drain cleaning.  Contact fields: Enter 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 wants to remain anonymous, ask the customer, “Are you sure you want to submit this request anonymously?”  Service Address fields: Enter the location of the inlet. Add additional information in the Description field.  \* Verify that you entered the address correctly by repeating the address back to the customer.  Description field: Enter any additional information about the inlet location or problem. Please be as specific as possible in the description.  Advise the customer:  \* If the inlets are at a single intersection with multiple corners, enter one service request. If inlets are at different intersections, enter one service request for each intersection.  \* PWD will inspect the inlet within 3 business days. |

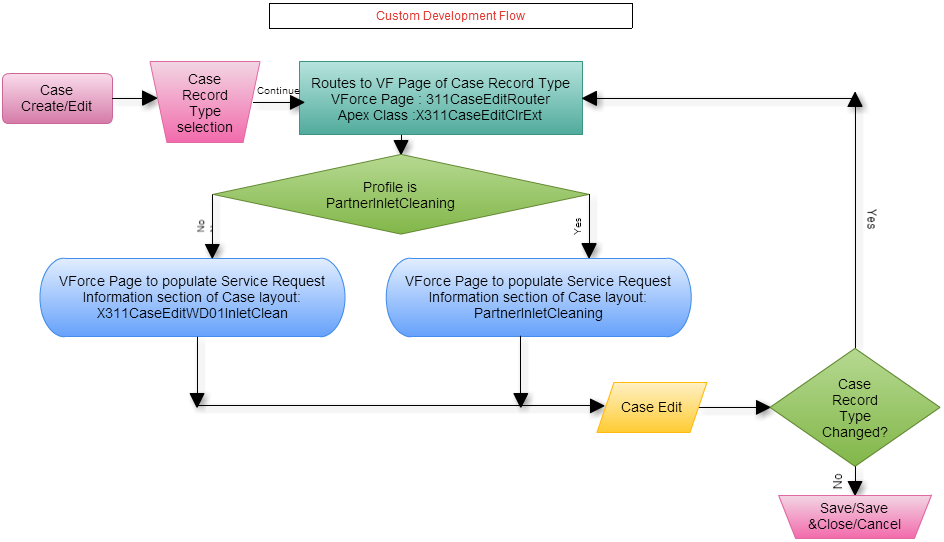
|  |
| --- |
| 3.2 DATA SHARING MODEL |

|  |  |  |  |
| --- | --- | --- | --- |
|  | ***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 : X311CaseEditWD01InletClean**

<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 Inlet Cleaning 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 : PartnerInletCleaning**

<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 Inlet Cleaning 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**

* **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: