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| **Philly CRM 311**  **Technical Design – SR-LI01 Boarding Room House**  **V1.5** |
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# REVISION HISTORY

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| --- | --- | --- | --- |
| **Revision Number** | **Revision Date** | **Summary of Changes** | **Author** |
| 1.5 | 04/07/2014 | This document was created based off requirements document “SR-LI01 Boarding Room House Requirements Definition” | Anne Egan |

# 1 - TABLE OF CONTENTS

[REVISION HISTORY 2](#_Toc390638939)

[1 - TABLE OF CONTENTS 3](#_Toc390638940)

[2 – SERVICE REQUEST INFORMATION 4](#_Toc390638941)

[2.1 ENTITY RELATIONSHIP DIAGRAM 5](#_Toc390638942)

[2.1.1 CASE STANDARD FIELDS 5](#_Toc390638943)

[2.1.2 CUSTOM FIELDS 7](#_Toc390638944)

[2.1.3 Dependent Picklist 12](#_Toc390638945)

[2.1.4 Force.com Objects 12](#_Toc390638946)

[2.2 HIGH LEVEL SYSTEM PROCESS FLOW 13](#_Toc390638947)

[3 - NEW FUNCTIONALITY 14](#_Toc390638948)

[3.1 CONFIGURATION DETAILS 14](#_Toc390638949)

[3.2 DATA SHARING MODEL 17](#_Toc390638950)

[3.3 CUSTOM DEVELOPMENT DETAILS 17](#_Toc390638951)

[3.3.1 Integration with Hansen 20](#_Toc390638952)

[4 – STANDARD CASE FIELDS 21](#_Toc390638953)

[4.1 DEPARTMENT DETAILS SECTION 21](#_Toc390638954)

[4.2 CASE DETAIL/INFORMATION SECTION 22](#_Toc390638955)

[4.3 SERVICE REQUEST LOCATION SECTION 24](#_Toc390638956)

[4.4 SERVICE REQUEST INFORMATION SECTION 24](#_Toc390638957)

[4.5 DESCRIPTION INFORMATION SECTION 25](#_Toc390638958)

[4.6 RESOLUTION INFORMATION SECTION 25](#_Toc390638959)

[4.6 WEB INFORMATION SECTION 26](#_Toc390638960)

[4.7 SYSTEM INFORMATION SECTION 26](#_Toc390638961)

# 2 – SERVICE REQUEST INFORMATION

|  |  |
| --- | --- |
| **Case Record Type :** | Boarding Room House |
| **Service Request ID** | SR-LI01 Boarding Room House |
| **Service Request Type** | Boarding Room House  Service Not Needed |
| **Department** | License & Inspection |

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| 2.1 ENTITY RELATIONSHIP DIAGRAM |



Id

**Custom Case Fields for LI Info Section**

Number of Unrelated Tenants Number

Rental License Picklist

Zoning Permit Picklist

Customer is a Tenant Picklist

Does Owner Reside at Property Picklist

Property Owner Name Text (255)

Property Owner Phone Number Phone Number

L&I District Text (50)

L&I Address Text (100)

|  |
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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,  Mobile, Text,Facebook,Twitter,Communities | Yes | No | Phone | No | None | Yes |  |
| Priority | Priority | Picklist  **Values:** 1,2,3,4,5,6,7,8,9 | Yes | No | Medium | No | None | Yes |  |

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| 2.1.2 CUSTOM FIELDS |

| **Field Type** | **Field Name** | **Data Type** | **Required** | **Unique** | **Default Value** | **External ID** | **Rule #** | **History** | **Help Text** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Number of Unrelated Tenants | NumberofUnrelatedTenants\_\_c | Number | Yes |  |  |  | None | Yes | How many unrelated tenants reside in the property? |
| Rental License | RentalLicense\_\_c | Picklist  **Values:** Yes, No | Yes |  | This read-only field will be automatically populated from the GIS Zoning layer associated with the GIS record selected as the Service Request Location. |  | Workflow Rule #1 |  | Does the property have a rental license? |
| Zoning Permit | ZoningPermit\_\_c | Picklist  **Values:** Yes, No | Yes |  | This read-only field will be automatically populated from the GIS Zoning layer associated with the GIS record selected as the Service Request Location. |  | Workflow Rule #2 |  | Does the property have the proper zoning permit? |
| Customer is a Tenant | CustomerisaTenant\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | None | Yes | Is the customer reporting the problem a tenant of the property? |
| Does Owner Reside at Property | DoesOwnerResideatProperty\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | None | Yes | Does the owner of the property reside there? |
| Property Owner Name | PropertyOwnerName\_\_c | Text(255) | Yes |  | This read-only field will be automatically populated from the Address Validation Service based on the Service Request Location. |  | None | Yes | The name of the property’s owner. |
| Property Owner Phone Number | PropertyOwnerPhoneNumber\_\_c | Phone Number | No |  |  |  | None | Yes | Information for contacting the property’s owner (if known). |
| 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 #3 | No | The L&I address key, based on the entered service address. |

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| 2.1.3 Dependent Picklist |

None.

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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 |

**Case Record Type:** *Boarding Room House*

Label: Boarding Room House

Support Process: Boarding Room House

Support Process Selected Values:

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

Record Type Name: Boarding Room House

**Buttons:**

* Case Edit
  + Save
  + Save & Close
  + Cancel
* Case Detail
  + Edit
  + Delete
  + Close Case
  + Clone -
    - Override Properties
      * With Visualforce Page “311CaseEditRouter”

**Tab Setup:**

**App Setup:**  Call Center Console

**User Profile Setup:**

* 311 Agents - 311 Contact Center Agents
* 311 Supervisors - 311 Contact Center Supervisor/Manager
* System Administrators - SFDC 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 *Rental License* | Display message: “The system has changed the *Case Record Type* to License Residential.”    Automatically change the *Case Record Type* = ‘License Residential’. | *Rental License* = ‘No’ | If there is no rental license, submit a License Residential service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 2 | Workflow Rule for *Zoning Permit* | Display Message: “If there is both a rental license and a valid zoning permit, there is no violation.”  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”. | *Rental License* = ‘Yes’ AND *Zoning Permit* = ‘Yes’ | If there is both a rental license and a valid zoning permit, there is no violation. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 3 | 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 | The system will change the case to a Service Not Needed if the Address Key returned from GIS is NULL. | 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**: None

**Queue(s) :** *L&I Operations North District*

*L&I Operations South District*

*L&I Operations East District*

*L&I Operations West District*

*L&I Operations Central District*

*311 Contact Center*

**Queue Members :** TBD

311 Contact Center - **None**

**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 report an illegal boarding or rooming house.   + Boarding house: The rental of rooms where meals are provided.   + Rooming house: Rented residential premises where an individual shares a kitchen and bathroom with others. * Contact fields: Enter the name and contact information of the person making the report.   + 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, valid address of the reported boarding/rooming house.   + 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: Enter a description of the boarding/rooming house. * Advise the customer:   + For an interior residential inspection, an adult (over 18) must be present. The L&I inspector will use the customer’s contact information to schedule an inspection time if the customer requests an interior inspection.   Once a case is entered into the system the property should be inspected by L&I within 30 business days. |

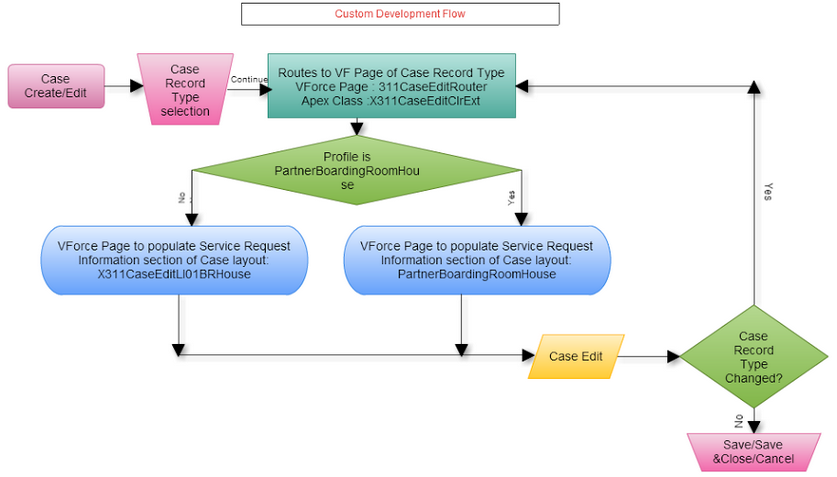
|  |
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| 3.2 DATA SHARING MODEL |

|  |  |  |  |
| --- | --- | --- | --- |
|  | ***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(X311CaseEditLI01BRHouse or PartnerBoardingRoomHouse)..
      3. Redirect to the page with parameters.

}

**Visual Force Page : X311CaseEditLI01BRHouse**

<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 BRHouse 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 : BoardingRoomHouse**

<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 BOARDING ROOM HOUSE 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 |
| triggerOnCases | Case |  | before insert, before update, after insert, after update | Insert / update | Closing the Case to Service Not Needed and updated other fields.  Update the Case Owner of the Case according to the Case Assignment Rule. |

**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, Case Age in Business hours & Call Center Console

**Other**

**Layout:** TBD

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Related Lists :

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

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| 3.3.1 Integration with Hansen |

This SR will be integrated with Hansen and Please see Philly CRM 311 Technical Design - Hansen Integration for more details.

# 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 | Depends on the case record type selected | 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:**  -Boarding Room House  -Service Not Needed | 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, Mobile,Text,Facebook,Twitter,Communities | 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. |

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| 4.4 SERVICE REQUEST INFORMATION SECTION |

Refer to Section 2.1.2.

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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 |  |
| Date/Time Closed | ClosedDate | Date/Time | N |  | N | Y |  |  | N |  |

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: