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| **Philly CRM 311**  **Technical Design – SR-LI02 Building Construction**  **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-LI02 Building Construction Requirements Definition” | Anne Egan |

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# 2 – SERVICE REQUEST INFORMATION

|  |  |
| --- | --- |
| **Case Record Type :** | Building Construction |
| **Service Request ID** | SR-LI02 Building Construction |
| **Service Request Type** | Building Construction  Electrical Construction  Plumbing Construction  Zoning Construction  Service Not Needed |
| **Department** | License & Inspection |

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| 2.1 ENTITY RELATIONSHIP DIAGRAM |



Id

**Custom Case Fields for LI Info Section**

Type of Work Being Done Multi-Picklist

Valid Permit Picklist

Unsafe Conditions Picklist

Where is Work Being Done Text

Day of Week Work Being Done Text

Time of Day Work Being Done Text

Contractor/Company Name Text

Sparking Wires or Illegal Hookups Depedent Picklist

Fence, Paved Area, or Shed Depedent Picklist

Fence Location Depedent Picklist

Fence Height (Feet) Depedent Picklist

Storage Shed Location Depedent Picklist

Storage Shed Size (Square Feet) Depedent Picklist

Paved Area to Create Parking Space Depedent Picklist

L&I District Text

L&I Address Text

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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 Label** | **Field Name** | **Data Type** | **Required** | **Unique** | **Default Value** | **External ID** | **Rule #** | **History** | **Help Text** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Type of Work Being Done | TypeofWork BeingDone\_\_c | Picklist  Values: Building, Electrical, Plumbing, Zoning | Y |  |  |  | Workflow Rule #1, Workflow Rule #2, Workflow Rule #3, Workflow Rule #4 | No | What type of construction work is being done (building, electrical, plumbing, zoning, or a combination of these)? |
| Valid Permit | ValidPermit\_\_c | Picklist  Values: Yes, No, Unsure | Y |  |  |  | Validation Rule #1, Workflow Rule #5 | No | Is there a valid permit for the work being done? Select “Unsure” if the permit may be exceeded or may be invalid. |
| Unsafe Conditions | UnsafeConditions\_\_c | Picklist  Values: Yes, No | Y |  |  |  | Workflow Rule #6 | No | Are there unsafe conditions at the site? |
| Where is Work Being Done | Whereis WorkBeingDone\_\_c | Text(255) | Y |  |  |  | None | No | Where is the work being done on the property (front, rear, right side, left side, interior, exterior, specific floors, basement, front yard, back yard, etc.). |
| Day of Week Work Being Done | Dayof WeekWorkBeingDone\_\_c | Text(100) | Y |  |  |  | None | No | On what day(s) of the week is the work being done? |
| Time of Day Work Being Done | Timeof DayWorkBeingDone\_\_c | Text(100) | Y |  |  |  | None | No | At what time(s) of day is the work being done? |
| Contractor/Company Name | Contractor/CompanyName\_\_c | Text(255) | N |  |  | ` | None | N | The name of the contractor or company doing the construction work (if it is known). |
| Sparking Wires or Illegal Hookups | SparkingWires orIllegalHookups\_\_c | DEPENDENT Picklist  (Controlling field = Type of Work Being Done)  Values = Yes, No  All values are shown if Type of Work Being Done = ‘Electrical’ | N |  |  |  | Workflow Rule #7 | N | Are there issues with sparking wires or illegal electrical hookups while electrical construction is NOT in progress? |
| Fence, Paved Area, or Shed | Fence,Paved Area,orShed\_\_c | DEPENDENT Picklist  (Controlling field = Type of Work Being Done)  Values = Fence, Paved Area, Storage Shed  All values are shown if Type of Work Being Done = ‘Zoning’ | N |  |  |  | None | N | Is the customer reporting a fence that is too high, an area paved to be a parking space, or a storage shed that is too big? |
| Fence Location | FenceLocation\_\_c | DEPENDENT Picklist  (Controlling field = Fence, Paved Area, or Shed)  Values = Front, Back  All values are shown if Fence, Paved Area, or Shed = ‘Fence’ | N |  |  |  | None | N | Where is the fence located (front or back of property)? |
| Fence Height (Feet) | FenceHeight(Feet) \_\_c | DEPENDENT Picklist  (Controlling field = Fence, Paved Area, or Shed)  Values = Under 4, 4, 5, 6, Above 6, Unknown  All values are shown if Fence, Paved Area, or Shed = ‘Fence’ | N |  |  |  | Workflow Rule #8, Workflow Rule #9 | N | What is the height of the fence (in feet)? |
| Storage Shed Location | StorageShedLocation\_\_c | DEPENDENT Picklist  (Controlling field = Fence, Paved Area, or Shed)  Values = Front, Back  All values are shown if Fence, Paved Area, or Shed = ‘Storage Shed’ | N |  |  |  | None | N | Where is the storage shed located (front or back of property)? |
| Storage Shed Size (Square Feet) | StorageShedSize(SquareFeet) \_\_c | DEPENDENT Picklist  (Controlling field = Fence, Paved Area, or Shed)  Values = 120 or Less, More than 120  All values are shown if Fence, Paved Area, or Shed = ‘Storage Shed’ | N |  |  |  | Workflow Rule #10 | N | What is the size of the storage shed (in square feet)? |
| Paved Area to Create Parking Space | PavedAreato CreateParkingSpace\_\_c | DEPENDENT Picklist  (Controlling field = Fence, Paved Area, or Shed)  Values = Yes, No  All values are shown if Fence, Paved Area, or Shed = ‘Paved Area’ | N |  |  |  | Workflow Rule #11 | N | Was an area at the site paved to create a parking space? |
| L&I District | L&IDistrict\_\_c | Text(50) | Y |  | 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 | N | The L&I district in which the property is located. |
| L&I Address | L&IAddress\_\_c | Text(100) | Y |  | 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 |  | The L&I address key, based on the entered service address. |

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| 2.1.3 Dependent Picklist |

**DEPENDENT Picklist Rule #1:**

Controlling field Name: Type of Work Being Done

Dependent Field Name: Sparking Wire or Illegal Hookups

Values = Yes, No

All values are shown if Type of Work Being Done = ‘Electrical’

**Dependent Picklist Rule #2:**

Controlling Field Name: Type of Work Being Done

Dependent Field Name: Fence, Paved Area, or Shed

Value = Fence, Paved Area, Storage Shed

All values are shown if Type of Work Being Done = ‘Zoning’

**Dependent Picklist Rule #3:**

Controlling Field Name: Fence, Paved Area, or Shed

Dependent Field Name: Fence Location

Value = Front, Back

All values are shown if Fence, Paved Area, or Shed = ‘Fence’

**Dependent Picklist Rule #4:**

Controlling Field Name: Fence, Paved Area, or Shed

Dependent Field Name: Fence Height (Feet)

Value = Under 4, 4, 5, 6, Above 6, Unknown

All values are shown if Fence, Paved Area, or Shed = ‘Fence’

**Dependent Picklist Rule #5:**

Controlling Field Name: Fence, Paved Area, or Shed

Dependent Field Name: Storage Shed Location

Value = Front, Back

All values are shown if Fence, Paved Area, or Shed = ‘Storage Shed’

**Dependent Picklist Rule #6:**

Controlling Field Name: Fence, Paved Area, or Shed

Dependent Field Name: Storage Shed Size (Square Feet)

Value = 120 or Less, More than 120

All values are shown if Fence, Paved Area, or Shed = ‘Storage Shed’

**Dependent Picklist Rule #7:**

Controlling Field Name: Fence, Paved Area, or Shed

Dependent Field Name: Paved Area to Create Parking Space

Value = Yes, No

All values are shown if Fence, Paved Area, or Shed = ‘Paved Area’

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| 2.1.4 Force.com Objects |

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

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| 2.2 HIGH LEVEL SYSTEM PROCESS FLOW |



# 3 - NEW FUNCTIONALITY

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| 3.1 CONFIGURATION DETAILS |

**Case Record Type:** *Building Construction*

Label: Building Construction

Support Process: Building Construction

Support Process Selected Values:

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

Record Type Name: Building Construction

**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 *Type of Work Being Done (Building)* | Automatically change the *Case Record Type* = ‘Building Construction’. | *Type of Work Being Done* = ‘Building’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 2 | Workflow Rule for *Type of Work Being Done (Electrical)* | Automatically change the *Case Record Type* = ‘Electrical Construction’. | *Type of Work Being Done* = ‘Electrical’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 3 | Workflow Rule for *Type of Work Being Done (Plumbing)* | Automatically change the *Case Record Type* = ‘Plumbing Construction’. | *Type of Work Being Done* = ‘Plumbing’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 4 | Workflow Rule for *Type of Work Being Done (Zoning)* | Automatically change the *Case Record Type* = ‘Zoning Construction‘. | *Type of Work Being Done* = ‘Zoning’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 5 | Workflow Rule for *Valid Permit* | Display message: “The system has changed the *Case Record Type* to Construction Site Task Force.”    Automatically change the *Case Record Type* = ‘Construction Site Task Force’. | *Valid Permit* = ‘Yes’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 6 | Workflow Rule for *Unsafe Conditions* | Display message: “The system has changed the *Case Record Type* to Construction Site Task Force.”    Automatically change the *Case Record Type* = ‘Construction Site Task Force’. | *Unsafe Conditions* = ‘Yes’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 7 | Workflow Rule for *Sparking Wires or Illegal Electrical Hookups* | Display message: “The system has changed the Case Record Type to Fire Residential.”    Automatically change the *Case Record Type* = ‘Fire Residential’. | *Sparking Wires or Illegal Electrical Hookups = ‘Yes’* | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 8 | Workflow Rule for *Fence Height* | Display Message = “If a fence is 4 feet high or lower and in the front of the property or along a street, no case will be submitted.”  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”. | *Fence Height* = ‘Under 4’ OR ‘4’ AND *Fence Location* = ‘Front’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 9 | Workflow Rule for *Fence Height* | Display Message = “If a fence 6 feet high or lower and in the rear of the property, no case will be submitted.”  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”. | *Fence Height* = ‘Under 4’ OR ‘4’ OR ‘5’ OR ‘6’ AND *Fence Location* = ‘Rear’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 10 | Workflow Rule for *Storage Shed Size (Square Feet)* | Display Message: “Only sheds greater than 120 square feet and more than 8 feet in height require building and zoning permits. These sheds can only be installed in the rear of a property.”  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”. | *Storage Shed Size (Square Feet)* = 120 or Less | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 11 | Workflow Rule for *Paved Area to Create Parking Space* | Display Message: “A zoning violation service request can be submitted only if the paved area is being used for a parking space.”  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”. | *Paved Area to Create Parking Space* = ‘No’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 12 | Workflow Rule for *L&I* *Address (NULL)* | Display Message: “A Building Construction case can be submitted only if the exact L&I address key is validated.”  Automatically change *Service Request Type* to “Service Not Needed’ and save the case.  Automatically assign the case and then close it with a *Close Reason* = “Service Not Needed”. | *Address Key* returned from GIS is NULL | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |

**Approval Processes:**  None

**Reports & Dashboards:** None

**Validation Rules**

|  |  |  |  |
| --- | --- | --- | --- |
| **Rule No** | **Rule Name** | **Conditions** | **Message** |
| *1* | Validation Rule for *Permit Number* | *Permit Number* <> Permit Number returned from GIS. | “The entered permit number is not a valid permit number.” |
| *2* | Validation Rule for *Sparking Wires or Illegal Hookups* | The *Sparking Wires or Illegal Hookups* field must be populated (not NULL) if *Type of Work Being Done* = ‘Electrical’ |  |
| *3* | Validation Rule for *Fence, Paved Area, or Shed* | The *Fence, Paved Area, or Shed* field must be populated (not NULL) if *Type of Work Being Done* = ‘Zoning’ |  |
| *4* | Validation Rule for *Fence Location* | The *Fence Location* field must be populated (not NULL) if *Type of Work Being Done* = ‘Zoning’ |  |
| *5* | Validation Rule for *Fence Height (Feet)* | The *Fence Height (Feet)*field must be populated (not NULL) if *Type of Work Being Done* = ‘Zoning’ |  |
| *6* | Validation Rule for *Shed Size (Square Feet)* | The *Shed Size (Square Feet)*field must be populated (not NULL) if *Type of Work Being Done* = ‘Zoning’ |  |
| *7* | Validation Rule for *Paved Area to Create Parking Space* | The *Paved Area to Create Parking Space* field must be populated (not NULL) if *Type of Work Being Done* = ‘Zoning’ |  |

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

*South L&I Construction District*

*East L&I Construction District*

*West L&I Construction District*

*Central L&I Construction District*

*311 Contact Center*

**Queue Members :** TBD

**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 one of the following:   + Someone doing building construction work without a permit.   + Someone doing electrical construction work without a permit or possible unsafe electrical work.   + Someone doing plumbing construction work without a license or without the proper permits, such as installing new plumbing.   + A fence over 6 feet in the rear of a property or over 4 feet in the front of a property without a permit.   + A storage container or shed without the required permits.   + A paved area that is used as a parking space. * Contact fields: Enter the name and phone number of the customer reporting the problem.   + Advise the customer that this information is requested in the event the department needs to obtain more information to follow up on this request.   + If the customer does not wish to leave their contact information, advise the customer that if the inspector cannot locate the issues identified, the case will have to be closed out.  Ask the customer, “Are you sure you want to submit this request anonymously?” * Service Address fields: Enter the property address.   + 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 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 detailed description of the construction work being done. * Advise the customer:   + - * L&I will inspect for complaints at a construction site including: possible unsafe work, no permits on file, work performed outside of the scope of the issued permit, mess affecting neighboring properties, refusal to post permits (after being asked).   An inspection should occur within 10 business days. |

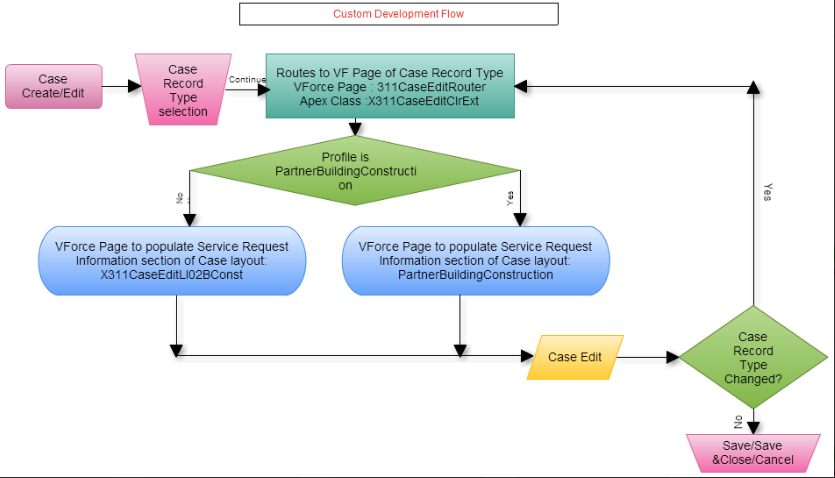
|  |
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| 3.2 DATA SHARING MODEL |

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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(X311CaseEditLI02BConst or PartnerBuildingConstruction)..
      3. Redirect to the page with parameters.

}

**Visual Force Page : X311CaseEditLI02BConst**

<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 BUILDING CONSTRUCTION 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 : PartnerBuildingConstruction**

<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 Building Construction 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

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 Case record 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:**  Building construction  Electrical Construction  Plumbing Construction  Zoning Construction  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 | 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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| 4.5 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 |  |

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

Additional comments: