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| **Philly CRM 311**  **Technical Design – SR-LI06 Construction Site Task Force**  **V1.5** |
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# REVISION HISTORY

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| --- | --- | --- | --- |
| **Revision Number** | **Revision Date** | **Summary of Changes** | **Author** |
| 1.5 | 03/20/2014 | This document was created based off requirements document “SR-LI06 Construction Site Task Force Requirements Definition” | Anne Egan |

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# 2 – SERVICE REQUEST INFORMATION

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| **Case Record Type :** | Construction Site Task Force |
| **Service Request ID** | SR-LI06 Construction Site Task Force |
| **Service Request Type** | Construction Site Task Force, Demolition, License Contractor, Service not needed |
| **Department** | License & Inspection |

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| 2.1 ENTITY RELATIONSHIP DIAGRAM |



Id

**Custom Case Fields for LI Info Section**

Building Collapsing Picklist

Building Under Construction or Demolition Picklist

Vallid Permit Picklist

Unlicensed Contractors Performing Work Picklist

Threatening Public Safety Picklist

Construction or Demolition Debris Causing Mess Picklist

Sidewalk Blocked Without Permission Picklist

Work Performed Before/After Hours Without Permission Picklist

Permit Visible And/Or Displayed Picklist

Type of Work Being Done Text

Contractor/Company Name Text

Demolition or Construction Picklist

Private Demolition Dependent Read Only

 Demolition Occurred More Than Year Ago Dependent Picklist

Demolition State Dependent Picklist

L&I District Text

L&I Address Text

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| 2.1.1 CASE STANDARD FIELDS |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Field Label** | **Field Name** | **Data Type** | **Required** | **Unique** | **Default Value** | **External ID** | **Rule #** | **History** | **Help Text** |
| Status | Status | Picklist  **Values:** New, In-Progress, Escalated, On Hold, and Closed | Yes | No | New | No | None | Yes |  |
| Case Origin | Origin | Picklist  **Values:** Phone, Email, Web, 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** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Building Collapsing | BuildingCollapsing\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #1 | No | Is the building collapsing? |
| Building Under Construction or Demolition | BuildingUnderConstruction orDemolition\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #2 | No | Is the building currently under construction? |
| Valid Permit | VallidPermit\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #3 | No | Review the Philly map. Based on the entered service address, is there a current construction or demolition permit? |
| Unlicensed Contractors Performing Work  If No, and no other conditions apply, then License Contractors service request rather than Construction Site Task Force service request? | UnlicensedContractorsPerformingWork\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #3 | No | Are unlicensed contractors, subcontractors, or independent contractors hired as 1099 employees doing the work? |
| Threatening Public Safety | ThreateningPublicSafety\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #3 | No | Are the construction or demolition activities threatening public safety, including adjacent properties? |
| Construction or Demolition Debris Causing Mess | ConstructionorDemolitionDebriCausingMess\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #3 | No | Is construction or demolition debris causing a mess? |
| Sidewalk Blocked Without Permission | SidewalkBlockedWithoutPermission\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #3 | No | Is the sidewalk blocked without permission to close the right of way? |
| Work Performed Before/After Hours Without Permission | WorkPerformedBefore/AfterHoursWithoutPermission\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #3 | No | Are the construction or demolition activities conducted after hours without permission? |
| Permit Visible And/Or Displayed | PermitVisibleAnd/OrDisplayed\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #3 | No | Is the permit visible and/or displayed? |
| Type of Work Being Done | TypeofWorkBeingDone\_\_c | Text(255) | Yes |  |  |  | None | No | What type of work is being done? |
| Contractor/Company Name | Contractor/CompanyName\_\_c | Text(100)  See Action Item #2. | Yes |  |  |  | None | No | The name of contractor or company doing the work (if known). |
| Demolition or Construction | DemolitionorConstruction\_\_c | Picklist  **Values:** Construction, Demolition, Both | Yes |  |  |  | None | No | Is the work being done construction, demolition, or both? |
| Private Demolition | PrivateDemolition\_\_c | Dependent Read-Only Picklist  (Controlling field = *Demolition or Construction*)  Values = Yes, No  All values are shown if *Demolition or Construction* = ‘Demolition’ OR ‘Both’ | No |  | This read-only field will be automatically populated using the open Private Demolition Permits from the GIS record associated with the Service Request Location. |  | Validation Rule #1, Workflow Rule #4 | No | Is the demolition a private demolition? |
| Demolition Occurred More Than Year Ago | DemolitionOccurredMoreThanYearAgo\_\_c | Dependent Picklist  (Controlling field = *Demolition or Construction*)  Values = Yes, No  All values are shown if *Demolition or Construction* = ‘Demolition’ OR ‘Both’  See Action Item #3. | No |  |  |  | Validation Rule #2, Workflow Rule #5 | No | Did the demolation occur more than one year ago? |
| Demolition State | DemolitionState\_\_c | Dependent Picklist  (Controlling field = *Demolition or Construction*)  Values = Yes, No  All values are shown if *Demolition or Construction* = ‘Demolition’ OR ‘Both’  See Action Item #4. | No |  |  |  | Validation Rule #3 | No | Is the demolition in progress or is it already completed? |
| 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 #6 | No | 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: Demolition or Construction

Dependent Field Name: Private Demolition

Values = Yes, No

All values are shown if Demolition or Construction = ‘Demolition’ OR ‘Both’

Note: This read-only field will be automatically populated using the open Private Demolition Permits from the GIS record associated with the Service Request Location.

**Dependent Picklist Rule #2:**

Controlling Field Name: Demolition or Construction

Dependent Field Name: Demolition Occurred More Than Year Ago

Value = Yes, No

All values are shown if Demolition or Construction = ‘Demolition’ OR ‘Both’

**Dependent Picklist Rule #3:**

Controlling Field Name: Demolition or Construction

Dependent Field Name: Demolition State

Value = Yes, No

All values are shown if Demolition or Construction = ‘Demolition’ OR ‘Both’

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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:** *Construction Site Task Force*

Label: Construction Site Task Force

Support Process: Construction Site Task Force

Support Process Selected Values:

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

Record Type Name: Construction Site Task Force

**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](https://cs18.salesforce.com/00e11000000LwrN)
* 311 Supervisors - [311 Contact Center Supervisor/Manager](https://cs18.salesforce.com/00e11000000Lws6)
* 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 *Building Collapsing* | Hot transfer the customer to 911.  Close this case. | *Building Collapsing* = ‘Yes’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 2 | Workflow Rule for *Building Dangerous* | Display message: “The system has changed the *Case Record Type* Building Dangerous.”    Automatically change the *Case Record Type* = ‘Building Dangerous. | *Building Under Construction or Demolition* = ‘No’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 3 | Workflow Rule for *Building Construction* | Display message: “The system has changed the Case Record Type to Building Construction.”    Automatically change the *Case Record Type* = ‘Building Construction. | *Valid Permit = ‘No’ AND Unlicensed Contractors Performing Work* = ‘No’ and  *Threatening Public Safety* = ‘No’ AND *Construction or Demolition Debris Causing Mess* = ‘No’ AND *Sidewalk Blocked Without Permission* = ‘No’ AND *Work Performed Before/After Hours Without Permission* = ‘No’ AND *Permit Visible And/Or Displayed* = ‘No’ AND *Demolition or Construction* = ‘Construction’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 4 | Workflow Rule for *Private Demolition* | Display message: “The system has changed the Case Record Type to Building Construction.”    Automatically change the *Case Record Type* = ‘Building Construction’. | *Private Demolition* = ‘Yes’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 5 | Workflow Rule for *Demolition Occurred More Than Year Ago* | Display Message: “for demolition that occurred more than a year ago, refer the report to Risk Management at 215-683-1713.”  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”. | *Demolition Occurred More Than Year Ago* = ‘Yes’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 6 | 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 | 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 *Private Demolition* | The *Private Demolition* field must be populated (not NULL) if *Demolition or Construction* = ‘Yes’ OR ‘Both’. |  |
| 3 | Validation Rule for *Demolition Occurred More Than Year Ago* | The *Demolition Occurred More Than Year Ago* field must be populated (not NULL) if *Demolition or Construction* = ‘Yes’ OR ‘Both’. |  |
| 4 | Validation Rule for *Demolition State* | The *Demolition State* field must be populated (not NULL) if *Demolition or Construction* = ‘Yes’ OR ‘Both’. |  |

**Queue(s) :** *L&I CSTF*

*L&I CSTF*

*L&I CSTF*

*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 any of the following: * Maintenance or safety issues with the city-ordered demolition of a building or home. [Demolition] * That someone is doing license contractor work without a permit. [License Contractor] * Construction or demolition conducted after hours, without authorization. L&I will inspect for complaints of work performed after hours at a construction/demolition site. [Construction Site Task Force 7669] * Construction or demolition work obstructing a sidewalk, that is not authorized by the City. L&I will inspect for complaints at a construction/demolition site where the sidewalk is blocked without permission to close the right of way. [Construction Site Task Force 7668] * Construction or demolition site with unposted licenses and permits. [Construction Site Task Force 7691] * Construction or demolition activities that threaten public safety, including to adjacent properties. [Construction Site Task Force 7690] * An unlicensed contractor or subcontractor and independent contractors hired as 1099 employees. L&I will inspect for complaints of unlicensed contractors performing work at a construction site. [Construction Site Task Force 7667] * A contractor making a mess or construction or demolition debris. [Construction Site Task Force 7693]   + 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: “In the event the inspector is unable to locate the issues identified, the case will have to be closed out. Are you sure you want to submit this request anyway?” * 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 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 any additional information about the problem being reported. * Advise the customer:   + - * Construction/demolition work can be done from 7 AM to 8 PM on weekdays or Saturday, and after 8 AM on Sundays or holidays. Emergency construction work, such as water main breaks or gas leaks, can be conducted as needed.       * Once an inspector is assigned, the building/site should be inspected within 10 business days.       * If violations are found, a stop work order will be issued immediately.       * The owner usually has up to 5 days to comply with violations. Thereafter, up to 3 re-inspections may be conducted to ensure violations were complied or resolved. If not complied at last inspection, property will be referred to court for judgment from the court demanding the owner to resolve the problems.       * If a customer is trying to report construction or demolition being done without a permit refer to topic 2430.   + Private demolition: If the demolition is privately done by the owner, permits would be issued for demolition and found in Hansen. If the customer is reporting issues or no permits at a private demolition, refer to Building Construction (Topic ID 2430). * A demolition inspection will occur within 48 hours. |

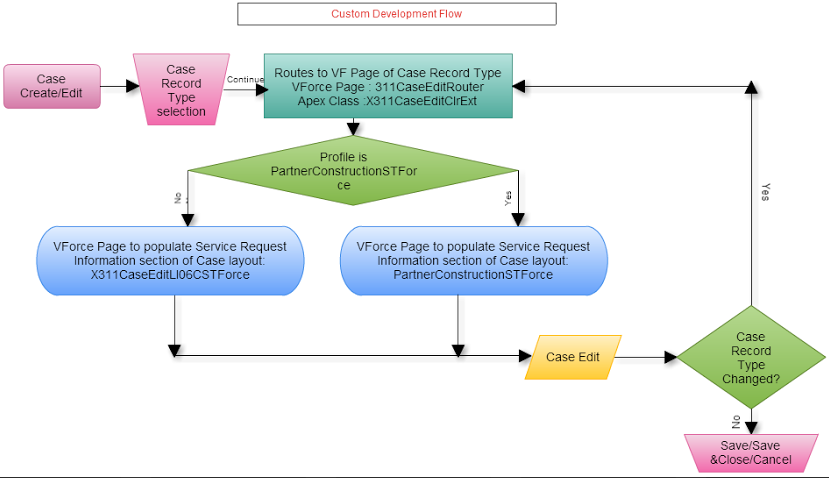
|  |
| --- |
| 3.2 DATA SHARING MODEL |

|  |  |  |  |
| --- | --- | --- | --- |
|  | ***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(X311CaseEditLI06CSTForce or PartnerConstructionSTForce)..
      3. Redirect to the page with parameters.

}

**Visual Force Page : X311CaseEditLI06CSTForce**

<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 CONSTRUCTION SITE TASK FORCE 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 : PartnerConstructionSTForce**

<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 CONSTRUCTION SITE TASK FORCE 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 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:**  Construction Site Task Force  Demolition  License Contractor  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. Otherwise, Section Header is “Case Detail” .

| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Unique** | **Read Only** | **External ID** | | **Validation** | **History** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Case Owner | Owner | Lookup(User,Queue) | N |  | N |  | N | N | None | | Y | When a case is created this field is set to the User creating the case. Upon save, the Standard Case Assignment Rule is executed and this field is updated to a Queue based on the case’s Service Request Type. Once the case is saved this field can be manually changed by a user. |
| Case Number | CaseNumber | Auto Number | N |  | N | Y | Y | N | None | | N | The system automatically populates this field when a case is created. |
| Caller Zip Code | Caller\_zip\_code\_\_c | Lookup(Contact) | Y |  | Y |  | N | N | None | | Y | This field will be populated by the Zip Code in the Contact record if one is associated with the case, otherwise the agent may populate it with a number from the caller. |
| Contact Name | Contact | Lookup(Account) | N |  | N |  | N | N | None | | Y | This field contains the Contact requesting the service. Ideally every case should have an associated contact. |
| Account Name | Account | Lookup(Account) | N |  | N |  | N | N | None | | N | This field contains the Account associated with the Contact record. |
| Parent Case | Parent | Lookup(Account) | N |  | N |  | N | N | None | | N | Two cases can be associated to each other via a parent/child relationship. This field identifies the “Parent” case. “Child” cases are displayed in the “Related Cases” Related List section for the “Parent” case. |
| Case Origin icon | Origin | Formula(Text) | Y |  | N |  | Y | N | None | | N | Shows an image representing the value in the Case Origin field. The formula for this field is: IMAGE(  CASE( Origin,  "Email", "https://<SalesforceOrg>.content.force.com/servlet/servlet.FileDownload?file=015K0000000238q",  "Phone", "https://<SalesforceOrg>.content.force.com/servlet/servlet.FileDownload?file=015K0000000238R",  "Web", "https://<SalesforceOrg>.content.force.com/servlet/servlet.FileDownload?file=015K000000023QL",  "/s.gif"),  "Origin Flag") |
| Contact Phone | ContactPhone | Phone | N |  | N |  | Y | N | None | | N | This display-only field is from the “Phone” field on the Contact record associated to the case. |
| Contact Email | ContactEmail | Email | N |  | N |  | Y | N | None | | N | This display-only field is from the “Email” field on the Contact record associated to the case. |
| Status | Status | Picklist  **Values:** On Hold, Escalated, Closed, New, In-Progress | N | New | Y |  | N | N | None | | Y | This required field defines the status of the case.   * “New” is the default value when creating a case. * All values except “Closed” are available when creating or editing a case.   “Closed” is the only value that can be selected when the “Close Case” button is used. |
| Case Origin | Origin | Picklist  **Values:** Email, Phone, Web, 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 |

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

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