Jun 28, 2022

Purpose:
Want to do 'Inspection' in Salesforce
To align on outcomes
- Tables, Objects, and fields
- If there's no API what to do?
- Roqel sofia agnes "what's giving you anxiety about integrations?"
  - Raquel : COM (Change of Occupancy Maintenance) is a subset - how to scale and be flexible? Design architecture for everything else. There are work orders that fall out of the COM process - how to address this?
  - Sofia: issues with ETL successfully importing - want the ETL to be successful with all dependencies. Voyagers? Have to resolve errors manually or have to get Yardi to go back in to do that.
  - Agnes: COM is such a small set from work orders - what is our goal? To create work orders from an app? Concerns around updates (bc of reasons they stated earlier). "Scaleable?" Start with COM and keep in mind while building everything out end goal should be for everything. Dont want confusion between yardi and sf mobile app for different orders (maintenance). Wanted to discuss error logging and debugging process.
  - Justin: integrations. API vs ETL. historically hire preferred consultants to build Yardi API's (Not preferred).
  - Dee: talk to Yardi and figure out ETL or API - don't want dirty data.
    - COM is a subset
    - ETL dependence/error handling
    - road/work - how
    - Mobile access

Work Order Process
- Created from Rent Cafe (where the residents can do on portal), Call center (is from Yardi), voyager (site staff enter WO's directly into voyager using service request or Add WO), maintenance app,
  - Same person could do COMS (Salesforce) and work order (Yardi app). They're both orders, but Yardi doesn't distinguish between the two. Not consistent.
  - There are priorities. SLA is 14 days.
  - TODAY: using Yardi app.
  - Trigger date is projected move out date. No COMS can start when residents are there. Pre move out service/cleaning.
  - Need a decision tree. To catch duplicate

- - Yardi app -> Work order table. Need same record doesn't matter the input method.
    - Voyager creates records into different tables.
    - HOME SPECIFIC REPAIRS ONLY. no hallway common areas etc. COMS is considered preventative maintenance.

- COM Phases: 14 days!
  - Pre-move out: Starts at Notice and ends when the COM work starts
  - COM: The COM Phase: begins at the start of COM work at the unit and is concluded when the unit is made ready in Voyager
    - Based on a series of pass
    - Digital inspection process. Data is emailed as reports to COMM supervisors. Looking at PDF and Yardi app manually entering data. No link.
    - Inspection records results to appropriately generate.
    - Dee: If Yardi "system of record" then link to COMs record then we need to talk to Yardi. Inspection and all the COMs related to it.
    - No photos stored in Yardi.
  - Post COM: The COM Phase starts when the unit is made ready in Voyager and
- User Types
  - Regional maintenance director
  -

General Pain Points
- Pain points
  - Lack of info on COM dashboard. In Yardi UI. Can you customize? No.
    - Team lead should see details and team member should see only tasks.
    - Analysis is wanted
      - Building robust tableau
  - No inspection data/tracking on COM Dashboard
    - Brendan: SF can do hierarchies - work orders in hierarchies
    - Mike Knight: don't want hierarchies? (maybe just in Yardi)
  - No Vendor Time Time Entry on WO's
    - Via 3rd party sometimes
    - Theres a product called 'vendor cafe' in yardi but they dont want to use it
    - Vendors dont want to do sign up

- - - No consistent process for someone to confirm and create that order. Sometimes handwriting. All over the place
    - Plan is to 'standardize'
  - No workflows or notifications for completed processes
    - There's no dependencies
    - There's no auto triggers

14 Tables populated when a new work order is created/modified. A lot of things can cause work orders creation to fail and lack of triggers.
  1. ACCT
  2. ChargTyp
  3. icInventoryLocation
  4. MM2EMPLRATES
  5. Mm2wostock
  6. Mm2wotempi
  7. MMASSET
  8. PREMPLOYEE
  9. Property
  10. Tenant
  11. Unit
  12. Vendor
- Mm2wo and mm2wodetail (parent and child)
  - Someone will always create child record. Many children to 1 parent.
  - Work order number that's in the detail that categorizes the items
- Database managers go in and create Property and make accessible for other users
- Dee: please put in department responsible for what table
- Brendan: Inventory? No
- Vendor records to pay $ and maintenance vendor for labor tracking
- VCM custom app being built on top of Yardi
  - Yardi UI for data entry currently
  - VCM custom app data should go into Yardi
  - Dee: why not just use SF for this purpose
  - Brendan: experience API in mule
- CJ: OCT gets new contract can we get this app
  - VCM is for now to store vendors until mulesoft is ready
  - Dee: Long term SF would be better

Admin Users can build custom tables they need to maintain it themselves TSQL.

Mobile Maintenance have key words

Integration: service orders need to happen ASAP but COM's can be less . Yardi integration is every 35 mins

CJ: compliance reports where it was generated and custom tables.

2 options to enter in but same table
- Create work order
- Create service request
- Category vs subcategory
- Priority for COM orders should be taken into consideration in SF

Agnes: ideally Inspection results should yield new work order template depending on what the inspection resulted.
- Select property/unit first and all the orders come up
- Tenant notifies leasing office, then puts vacate notice in yardi

Work orders > COM > Gov inspection > Leasing (can't show before gov inspec)
- Driven by 'available' date
- Custom fields on work orders : User defined dates

Working with air force - they probably won't change

Agnes: use workflow to force use certain things, and history tracking. Yardi is prone to corrupt data. Brendan: validation rules

Permissions By Group - Agnes: want more specific. Not granular to fields. COM's is with Work Orders and cannot restrict by line item.

Dee: certain stage 'Final QA' is checked off then to trigger gov inspection
- CJ and Raquel : final QA > gov inspec> available date
- Need email alerts

COM's are more complex than work orders. Gov inspections are specific to COM's.
Dee: Pass/Fail at the end of the process.

- CJ: what is the process of inspection feedback. Then they need to talk to military people to see if they are onboard
- If one thing fails the whole thing fails - should automatically generate new work order
    - Agnes: Want binary pass or fail
    - If pass > sub object under fail to explain why
- Gov inspection prob can't include rn bc they use their own

COM
- Resident Status to 'notice'
- 'Move out date' triggers creation

Military Resident
- MILT_Tenant table
- Action items for crew: notate whats core vs military

VCM
- Dashboard - vendors will expire on this date
- Always block non compliance vendors
    - Vendor compliance is very important

Styles:
- Similar to Yardi - but they don't like the colors
- UI/UX similar - customize

Work Orders
- 60 rows of details get created with values 0 and 1
- Some fields have triggers some don't
- ETL integrations with Yardi, they need to set up sftp. Dee: integration should fire enough but not lock up tables

2 types of housing
- Active duties (OET)
- Fully Conventional

Opportunities
- Leasing workflow: civilian vs military