

Business Optimisation / Opportunity Outline Commercial Units (Salesforce)

4th December 2023

Opportunity Name: Commercial Units & Salesforce

Business Owner/
Sponsor: Hanna Thompson

Submitted by: Lesley Richardson Business area: Accounts Receivable

Problem Statement

Development type property does not integrate without manual intervention.

When we have a property with a Property Type of Development, Any new units do not integrate to Salesforce without manipulation from Andrea Cockbain.

I believe the steps she needs to take are:

Create the Unit ref/Amend unit description.

Property Type needs to be changed to Residential from Development.

RV code on the unit needs to be changed to 1 for each unit.

Once the tenant is applied to the unit we then needs to make some change to trigger the integration of the unit, and then again to trigger the integration for the tenant.

Andrea then needs to change the Property and unit fields back to their original settings, I believe by close of business that day.

Aldershot – under development for property level. No integration to Salesforce (due to these being development).

Aldershot units classed as Development – not populated in Salesforce currently.

Business Objective

More efficient process/solution needs to be outlined as we are seeing more of these with the bring on of the new properties.

That said it is not a daily action by any stretch.

Business Outcome

Hanna and I have considered if new salesforce/Qube process will alleviate the issue, however this does not seem to be the case as:

1. Will not resolve the fact that the unit is not in salesforce.
2. Payments would not be able to be actioned as require a unit to attach to.
3. Opportunities are linked to a unit.
4. Will only potentially fix the issue using the 18 digit Contact Ref when we create a Tenant/Contact in Salesforce, if the unit is already in Salesforce, otherwise we are back to point 2

Suggestion of a new Property Type heading which would allow integration to take place.

Benefits

Saves time having all required live units in Salesforce.
No risk of amended fields being left in the wrong status.
No delays in setting up tenant's payments/direct debits – commercial units are often large amounts.
Reduces risk of manual error.

Is this a compliance/ regulatory impact for consideration

This is a process issue with BAU – no compliance or regulatory impact.
Process issue due to property type that we have chosen to use for these units.

Risks

Delay in taking payments/ setting up direct debits.
Property and Unit level amended fields being left in the wrong status.
Confusion if usual players are out of office.

Additional Information

Commercial payments have payment options against Contact rather than Person Account.

Not a daily occurrence but increasing as Commercial units increase with new blocks.
Exact number not known but will increase rather than decrease.

Discussed on 22/11 and agreed to take forward.

Thank you