

# User Guide: Salesforce End of Tenancy

## Version History

Version	Description of Change	Author	Date
0.1	First Draft	Nikki Papenfus	12/12/2023
0.2	Axis & Grainger Trust Changes	Nikki Papenfus	29/04/2024
3.0	Single View of Tenancy Release	Nikki Papenfus	05/06/2025
4.0	Tenancy Review opportunity automatically closed on EoT creation.	Nikki Papenfus	07/08/2025

## Table of Contents

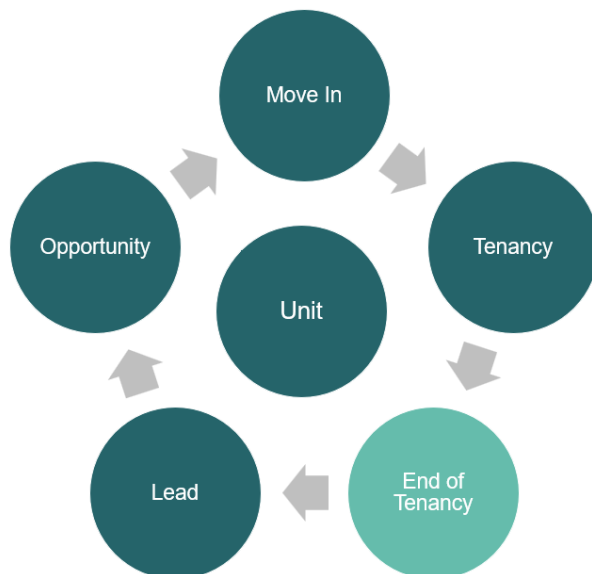
1. Overview .....	3
2. How to Create an EOT .....	7
3. The EOT at a Glance .....	8
3.1 Key EOT Details.....	9
4. End of Tenancy Tasks.....	10
4.1 Where Do I Find My Tasks?.....	10
4.2 The Task at a Glance.....	11
4.3 Task Statuses.....	12
4.4 Starting a Task .....	12
4.5 Completing a Task .....	13
(a) Axis Voids .....	14
4.6 Setting Tasks to N/A.....	15
4.7 Reopening a Closed Task.....	15
4.8 Expected Delays.....	16
4.9 Overdue Tasks & Task Duration .....	18
5. Cancel or Close an End of Tenancy .....	19
6. Reports & Dashboards .....	20
6.1 Onsite Property Management Reports .....	20
6.2 Cost of Void Report .....	20
6.3 Asset Management Reports .....	21
7. End of Tenancy Owners .....	22
7.1 Finding My End of Tenancies.....	22
7.2 End of Tenancies at Risk .....	22
7.3 Approving Requests to Cancel or Close an End of Tenancy .....	23

## 1. Overview

The **End of Tenancy process** takes place from the time it is known that a tenant will be vacating a unit until all activities required to wind down the tenancy and make the unit ready for the next tenant are complete. These activities include:

- Notifying the relevant persons that the unit is becoming vacant.
- The pre-vacation inspection (PVI).
- Tenant move out.
- Works to refurbish, refresh or clean the unit.
- Closing down the tenancy & returning the tenant's deposit.

Note that End of Tenancy does not include move-in or activities related to the *following* tenancy.



As soon as a tenant provides their **notice to quit** (NTQ), an End of Tenancy should be created in Salesforce.

- Each End of Tenancy contains a sequence of **phases** that the process will progress through.
- Each phase contains **tasks** that must be completed.
- Each task is automatically assigned to a **responsible team**.
- Thereafter, tasks are assigned to individual person within the team, the **task owner**, who can monitor the tasks that are ready to be worked on within Salesforce.

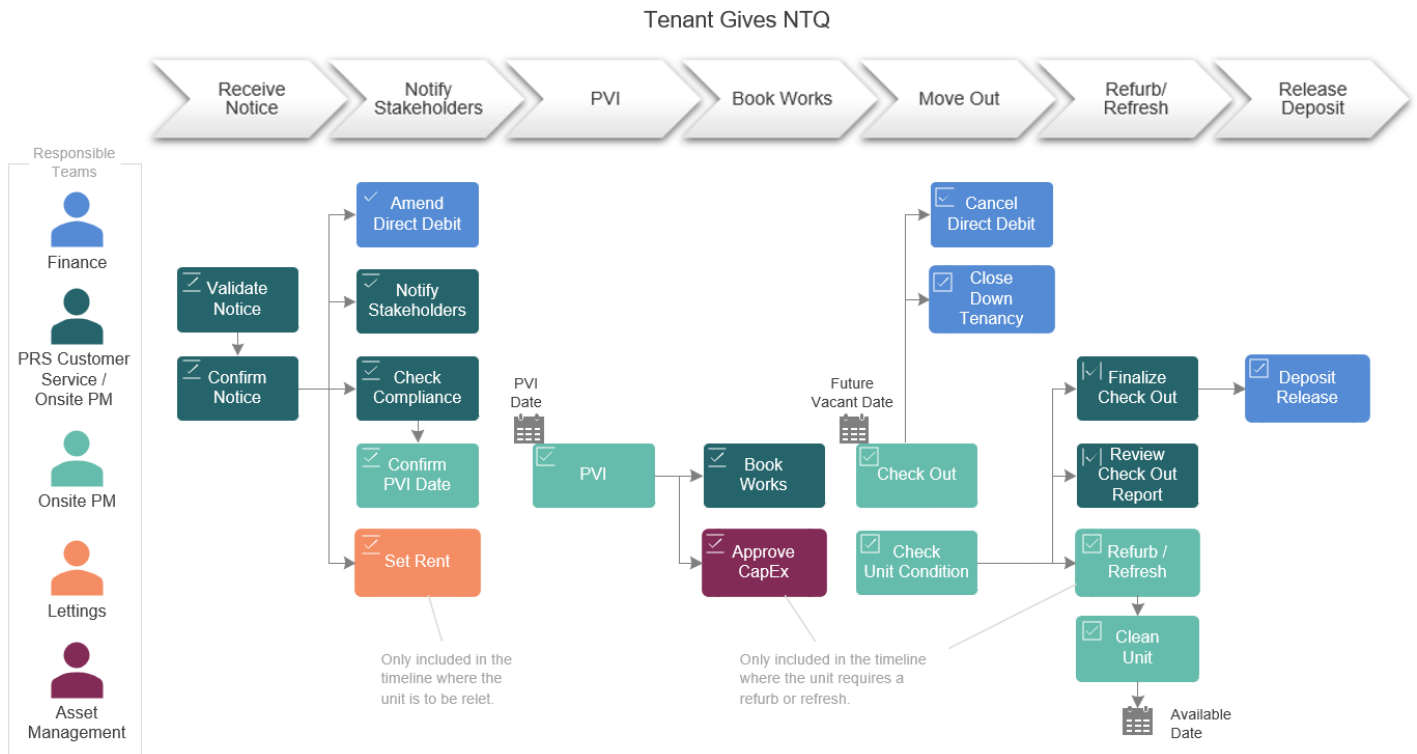
When initially created, an **estimated timeline** is calculated for the End of Tenancy, based on the information available at the time. Each task will have an estimated start date & target end date, and the resultant available date for the unit will be projected.

Any **expected delays** may also be incorporated into the timeline.

## End of Tenancy Phases & Tasks

The following illustrates the sequence of phases and tasks.

- Some tasks will start on the *PVI Date* or on the *Future Vacant Date*.
- Other tasks may be dependent on previous, prerequisite tasks being completed.



The estimated task dates are automatically updated when:

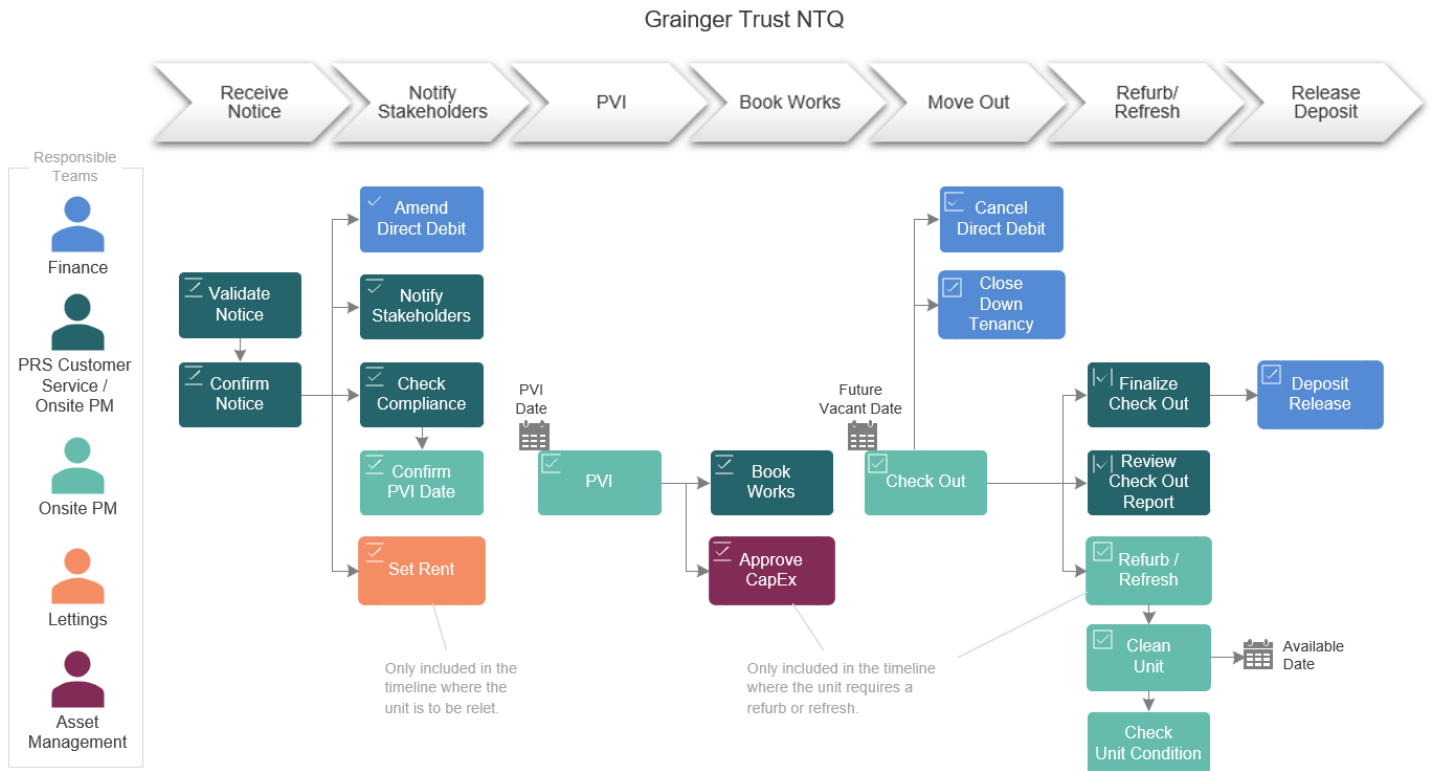
- The *PVI Date* and *Future Vacant Date* are updated and confirmed.
- Prerequisite tasks are completed.
- Any expected delays are captured.

Tasks will be added or removed from the timeline when:

- The unit is flagged to be relet.
- The works type required for the unit (i.e. refurbishment, refresh or clean only) is updated.

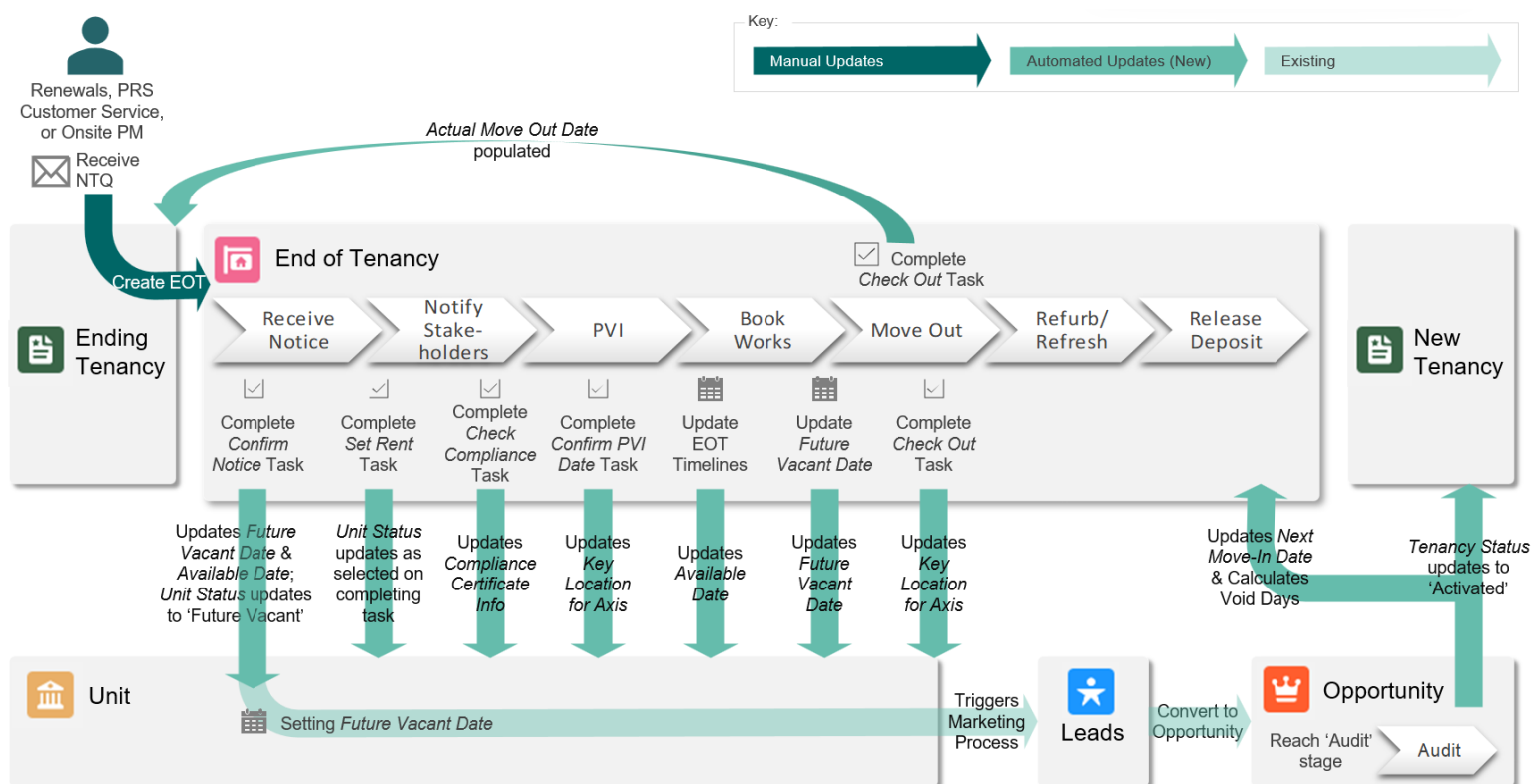
A slightly different sequence of tasks is available for **Grainger Trust** units.

In this timeline, the task to *Check Unit Condition* will only take place after all works are complete:



## Interaction between End of Tenancy & other Tenancy-Related Objects in Salesforce

The integration between the End of Tenancy and related information in Salesforce is illustrated below:



- The following **unit** details will be automatically updated from the End of Tenancy:
  - The unit's **Future Vacant Date** and estimated **Available Date** will be updated at the end of the *Receive Notice* phase, i.e. once the notice to quit has been validated and confirmed. Any subsequent changes to the *Future Vacant Date* or the *Available Date* in the End of Tenancy will immediately update the unit.
  - The **unit status** will be updated to 'Future Vacant' at the end of the *Receive Notice* phase, and again to either 'On the Market Available to View' or 'On the Market - No Access' based on the information entered by Lettings on completing the *Set Rent* task.
  - Compliance certificate** information will be reviewed & updated on completion of the *Check Compliance* task.
  - Where a unit is under full Axis contract: The **key location for Axis voids** will be reviewed & updated when completing the *Confirm PVI Date* task, and again on completing the *Check Out* task.
- On completion of the *Check Out* task, the **Actual Move Out Date** will be saved on the **ending tenancy**. The activated **contract** associated to the tenancy will be ended.
- Once the **new tenancy** for the unit is confirmed (i.e. the associated **opportunity** reaches the 'Audit' stage), the number of days which the unit stood vacant and the associated **void cost** can be calculated.

## 2. How to Create an EOT

An End of Tenancy is created from the vacating tenant's **Tenancy**.

The screenshot shows the Salesforce interface for a 'Person Account Test' under the 'Tenancies' tab. The 'Create End of Tenancy' button is highlighted with an orange arrow. Below the main header, there is a table of 'Contracts (2)' with columns for Record Number, Tenancy Type, Start Date, End Date, Record Status, Opportunity, and Rent. The table shows two records with start dates of 01/05/2025 and end dates of 30/04/2027. Below the table, there are sections for 'End Of Tenancies (0)' and 'Opportunities (1)'. A callout box points to the 'Create End of Tenancy' button, stating: 'To create a new End of Tenancy, open the **Tenancy** for the vacating tenant and select **'Create End of Tenancy'**'.

Record Number	Tenancy Ty...	Start Date	End Date	Record Status	Opportunity	Rent
1 00044586	New	01/05/2025	30/04/2027	Draft	Nadia test	1,025.00
2 00044585	New	01/05/2025	30/04/2027	Activated	Nadia test	1,025.00

The screenshot shows the 'Create New End of Tenancy' form. It includes fields for Notice to Quit Date (5 Jun 2025), Future Vacant Date (7 Jul 2025), PVI Date (9 Jun 2025), and EoT Template (Tenant Gives NTQ). A callout box points to the 'Future Vacant Date' field, stating: 'If the **Future Vacant Date** is not known or not confirmed, enter an estimated date; this can be changed later.' Another callout box points to the 'PVI Date' field, stating: 'The **PVI Date** will default to 4 weeks prior to *Future Vacant Date* but can be changed if required. The PVI Date can also be updated at a later time once the *Future Vacant Date* is confirmed.' A third callout box points to the 'EoT Template' field, stating: 'For Grainger Trust units: Select **'Grainger Trust NTQ'** as the EoT Template. This will create an End of Tenancy with tasks & timelines that have been customized for Grainger Trust units.' A fourth callout box points to the 'Unit Manager' field, stating: 'The **Unit Manager** is responsible for the overall End of Tenancy.' The form also includes a 'Create New End of Tenancy' button at the bottom right.

- i** A unit cannot have more than one End of Tenancy in progress at a time.
- A summary of all active & complete End of Tenancy's for a particular unit can be found on the Unit's Related screen.

If there is an open **Tenancy Review opportunity** for the tenancy at the time that the End of Tenancy is created, the opportunity will be automatically closed and a task will be created notifying the tenancy review negotiator.

## 3. The EOT at a Glance

End of Tenancy **phases** will automatically close once all the tasks within a phase are complete.

A timeline of all **outstanding tasks**. Click on a task name to open the task details.

The **EOT Owner** is responsible for the overall EOT

The End of Tenancy will automatically update to '**Complete**' once all tasks are complete.

**Task Owner:** Person / team responsible for an individual task.

**Completion Date:** Date on which the EOT process is expected to be complete. Automatically updates as timelines change.

**Available Date:** Date the unit is expected to be available (i.e. any works are completed & the unit is cleaned). Automatically updates as EOT timelines change.

Relevant **emails** and **documents** can be attached to the End of Tenancy, these may include:

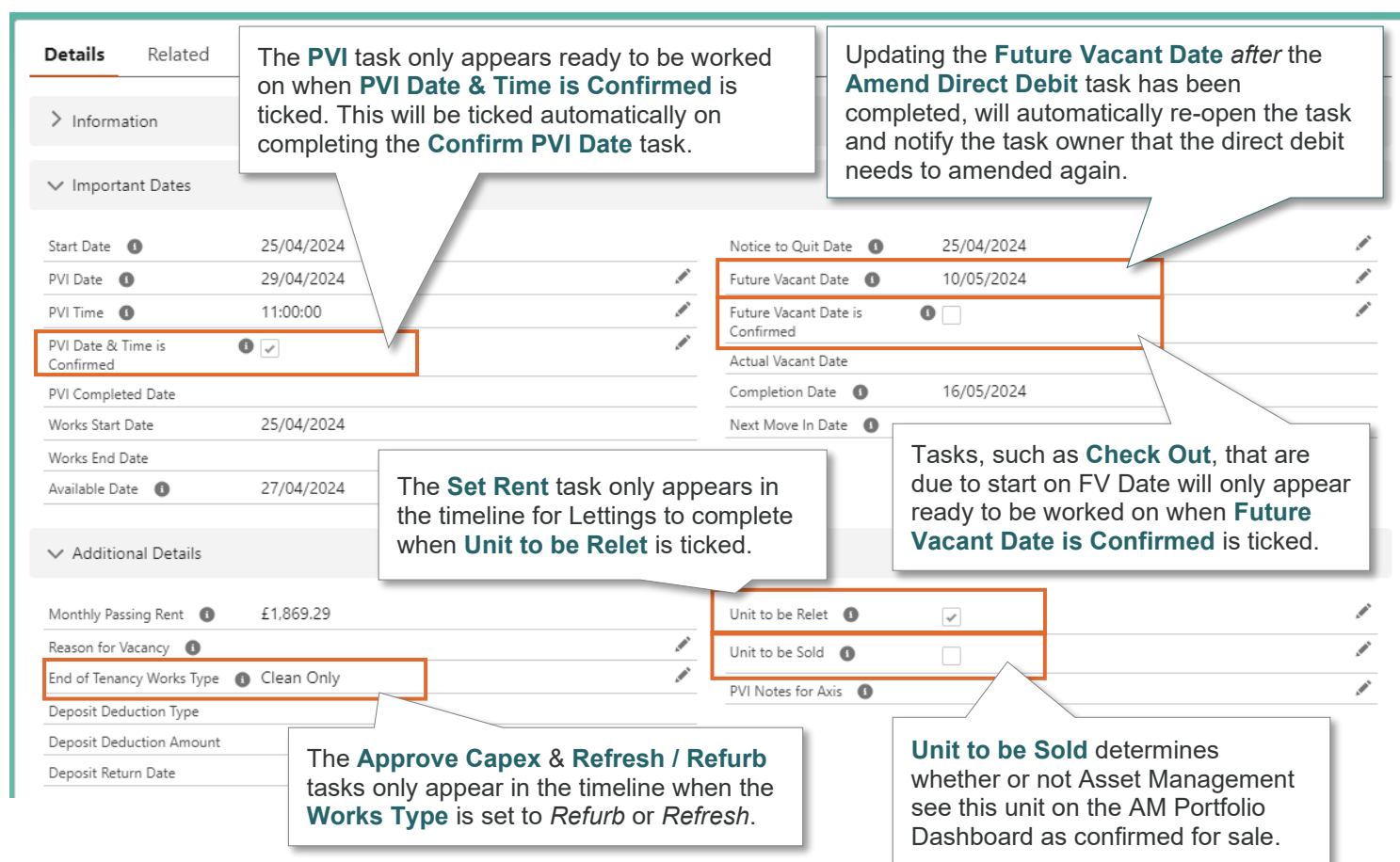
- Notice to quit & related emails from the tenant.
- Deposit Return Instruction
- Check Out Report

Access the full list of associated tasks, including completed tasks, here.



## 3.1 Key EOT Details

 Note that some of the End of Tenancy details will **affect timelines and tasks**:



The **PVI** task only appears ready to be worked on when **PVI Date & Time is Confirmed** is ticked. This will be ticked automatically on completing the **Confirm PVI Date** task.

Updating the **Future Vacant Date** after the **Amend Direct Debit** task has been completed, will automatically re-open the task and notify the task owner that the direct debit needs to be amended again.

The **Set Rent** task only appears in the timeline for Lettings to complete when **Unit to be Relet** is ticked.

Tasks, such as **Check Out**, that are due to start on FV Date will only appear ready to be worked on when **Future Vacant Date is Confirmed** is ticked.

The **Approve Capex & Refresh / Refurb** tasks only appear in the timeline when the **Works Type** is set to **Refurb** or **Refresh**.

**Unit to be Sold** determines whether or not Asset Management see this unit on the AM Portfolio Dashboard as confirmed for sale.

**Details** Related

> Information

Important Dates

Start Date 25/04/2024

PVI Date 29/04/2024

PVI Time 11:00:00

PVI Date & Time is Confirmed ☒

PVI Completed Date

Works Start Date 25/04/2024

Works End Date

Available Date 27/04/2024

Additional Details

Monthly Passing Rent £1,869.29

Reason for Vacancy

End of Tenancy Works Type Clean Only

Deposit Deduction Type

Deposit Deduction Amount

Deposit Return Date

Notice to Quit Date 25/04/2024

Future Vacant Date 10/05/2024

Future Vacant Date is Confirmed ☐

Actual Vacant Date

Completion Date 16/05/2024

Next Move In Date

Unit to be Relet ☒

Unit to be Sold ☐

PVI Notes for Axis

Note that the following End of Tenancy details cannot be entered directly; these will display on the **Details** screen as the information becomes available:

End of Tenancy Details that are Automatically Calculated	
Start Date	Date End of Tenancy was created.
Available Date	Day after the <i>Clean Unit</i> task is due to be completed / was completed. Updates automatically as the End of Tenancy timelines change.
Completion Date	Date the last End of Tenancy task is due to be completed / was completed. Updates automatically as the End of Tenancy timelines change.
PVI Completed Date	Date on which the <i>PVI</i> task is completed.
Works Start Date	Date on which the <i>Check Out</i> task is completed.
Deposit Return Date	Date on which the the <i>Deposit Release</i> is completed.
Monthly Passing Rent	Sourced from the ending tenancy's details in Salesforce.
Next Move In Date	<i>Tenancy Start Date</i> for the next tenancy for the unit.

## 4. End of Tenancy Tasks

### 4.1 Where Do I Find My Tasks?

End of Tenancy tasks that ready to be worked on can be found on the Salesforce [Home page](#).

- **My EoT Tasks for Today** displays all tasks that are assigned to you & ready to be worked on.

**My EoT Tasks for Today**  
Showing 20 of 20 items

Search this list...

Task Name	Task Status	Target End Date	Overdue Days
Confirm Notice	In Progress	31 Oct 2023	36
Validate Notice	In Progress	31 Oct 2023	36
Check Unit Condition	In Progress	4 Nov 2023	32
Confirm Notice	Active	9 Nov 2023	27
Amend Direct Debit	Active	11 Nov 2023	25
Amend Direct Debit	Active	12 Nov 2023	24
Cancel Direct Debit	Active	23 Nov 2023	13
Amend Direct Debit	Active	23 Nov 2023	13
Cancel Direct Debit	Active	23 Nov 2023	13
Amend Direct Debit	Active	23 Nov 2023	13

The most urgent tasks are displayed at the top of the list.

- **My Team's Unassigned EoT Tasks for Today** displays all tasks for which your team is responsible and are ready to be worked on, but have not yet been assigned to anyone.

**My Team's Unassigned EoT Tasks for Today**  
Showing 4 of 4 items • 2 items selected

Search: barham house

<input type="checkbox"/>	Task Name	Unit	Target End Date	Overdue Days
<input checked="" type="checkbox"/>	Validate Notice	1, Barham House, ...	6 Dec 2023	6
<input checked="" type="checkbox"/>	Notify Stakeholders	1, Barham House, ...	6 Dec 2023	6
<input type="checkbox"/>	Validate Notice	7, Barham House, ...	9 Dec 2023	3
<input type="checkbox"/>	Check Compliance	1, Barham House, ...	12 Dec 2023	0

Assign Selected Tasks to Me

Filter by task name or unit.

Add a comma to search for multiple names, e.g.: "ancoats, headline".

Shortcut to assign one or more tasks to yourself.

Task lists for each team can also be found under the *End of Tenancy Tasks* menu item.

Grainger PLC Home Leads Accounts Contacts Opportunities Blocks Buildings Units Tasks Notes End Of Tenancy Tasks More

End Of Tenancy Tasks  
**My Open Tasks**

50+ items • Sorted by End Of Tenancy • Filtered by My end of tenancy tasks - Task Status • Updated a few seconds ago

Search this list...

Change Owner Printable View

	End Of Tenancy Task Name	End Of Tenancy	Unit	Task Status	Start Date	Target End Date	Overdue Days	Expected Delay Days	Delay Reason	Notes
1	<input type="checkbox"/> Amend Direct Debit	EoT-00330	7, Barham House...	Pending	14/12/20...	16/12/2023	0	0		
2	<input type="checkbox"/> Cancel Direct Debit	EoT-00330	7, Barham House...	Pending	29/12/20...	31/12/2023	0	0		
3	<input type="checkbox"/> Close Down Tenancy	EoT-00330	7, Barham House...	Pending	29/12/20...	03/01/2024	0	0		

## 4.2 The Task at a Glance

**Start Date:** Date when work should begin on the task.

**Target End Date:** Date by which the task should be completed.

**Task Status:** Active tasks are ready to be worked on once the start date is reached.

The screenshot shows the Salesforce interface for an 'End Of Tenancy Task' titled 'Confirm Notice'. The top navigation bar includes 'Grainger PLC', 'Home', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Blocks', 'Tasks', 'Notes', 'End Of Tenancy Tasks', and 'More'. The task details are as follows:

End Of Tenancy	End Of Tenancy Phase	Start Date	Target End Date	Task Status
EoT-00287	Receive Notice	01/12/2023	02/12/2023	Active

Below the task details, there are sections for 'Details' and 'Related'. The 'Details' section includes:

- End Of Tenancy Task Name:** Confirm Notice
- End Of Tenancy:** EoT-00287
- End Of Tenancy Phase:** Receive Notice
- Unit:** Apt 314, Abbeville Apts, 37 London Rd, Barkin
- Owner:** Hazel Armstrong
- Task Status:** Active
- Task Overdue:** ☒
- Task Team:** Abbeville Apartments

There are also sections for 'Timing', 'Delay Details', and 'Additional Information'. The 'Additional Information' section includes 'Notes' and 'Closure Reason'. The 'Notes' section contains the following information:

In order to complete this task:

- Notify residents that notice has been accepted or denied via phone call and email.
- Send *DRI* and *Steps to Vacating* forms to tenant for them to complete.
- Update key location on Unit.
- Update Qube.

The 'Created By' field shows 'Hazel Armstrong, 01/12/2023, 15:09' and the 'Last Modified By' field shows 'Open box, 12/12/2023, 15:01'.

Callouts provide additional context:

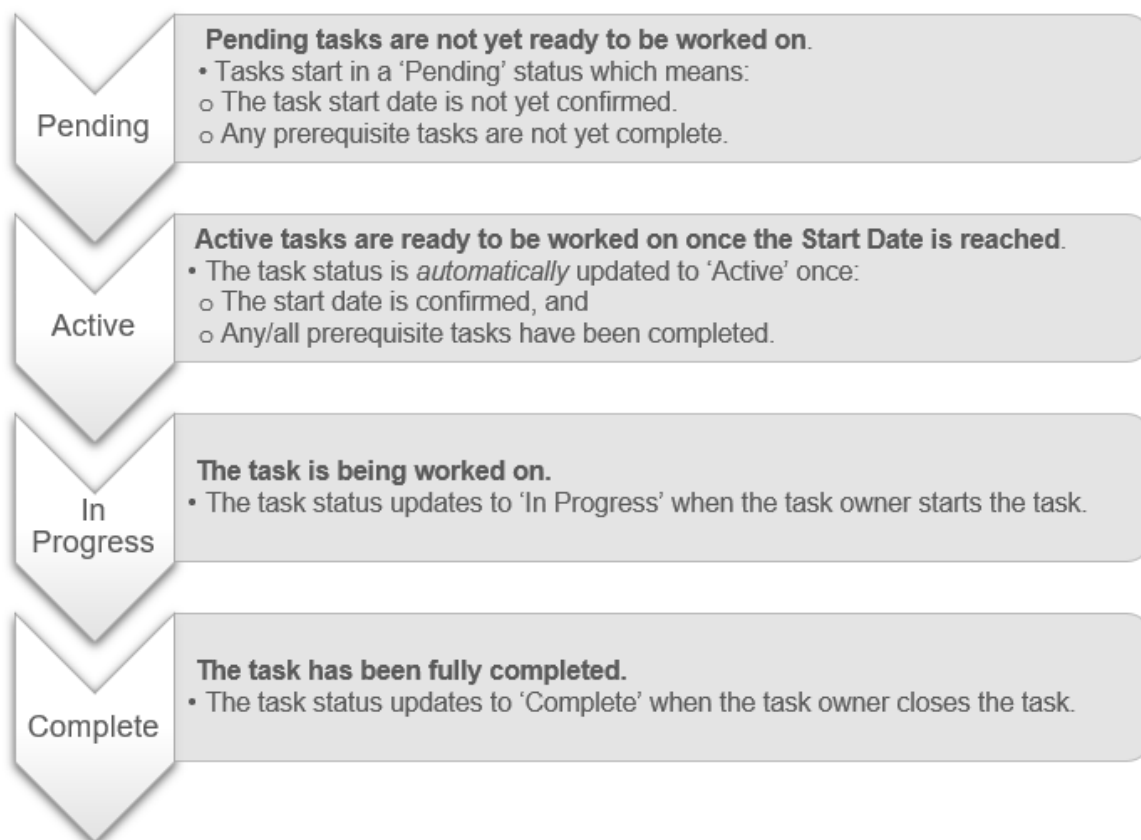
- Files:** Documents & emails can be linked to a task in the **Related** tab.
- Owner:** Person responsible for completing the task. Tasks are initially assigned to a **Task Team** and should be allocated to an individual as start date approaches.
- Notes:** Capture any relevant notes about task progress; these may appear in reports.
- Information:** Guidance on what needs to be done before the task can be marked as complete.

A task's **Start Date** and **Target End Date** will automatically update as work progresses on the End of Tenancy.

- Where a task is dependent on the **Future Vacate Date** or **PVI Date**, the task dates will automatically update when these dates changes.
- Where a task is dependent on other **prerequisite tasks** being completed, the task dates will automatically update as preceding tasks are completed or where any expected delays are captured.

### 4.3 Task Statuses

Tasks progress through a sequence of statuses:



Alternately, where a task is not applicable for a particular End of Tenancy, the task status can be set to '**N/A**'. See [Setting Tasks to N/A](#).

### 4.4 Starting a Task

If you have started working on a task, but it is not yet complete:

Select 'Start Task'

You will be automatically assigned as the task **Owner** & the task status will be set to '**In Progress**'.

**End Of Tenancy Task**  
**Validate Notice**

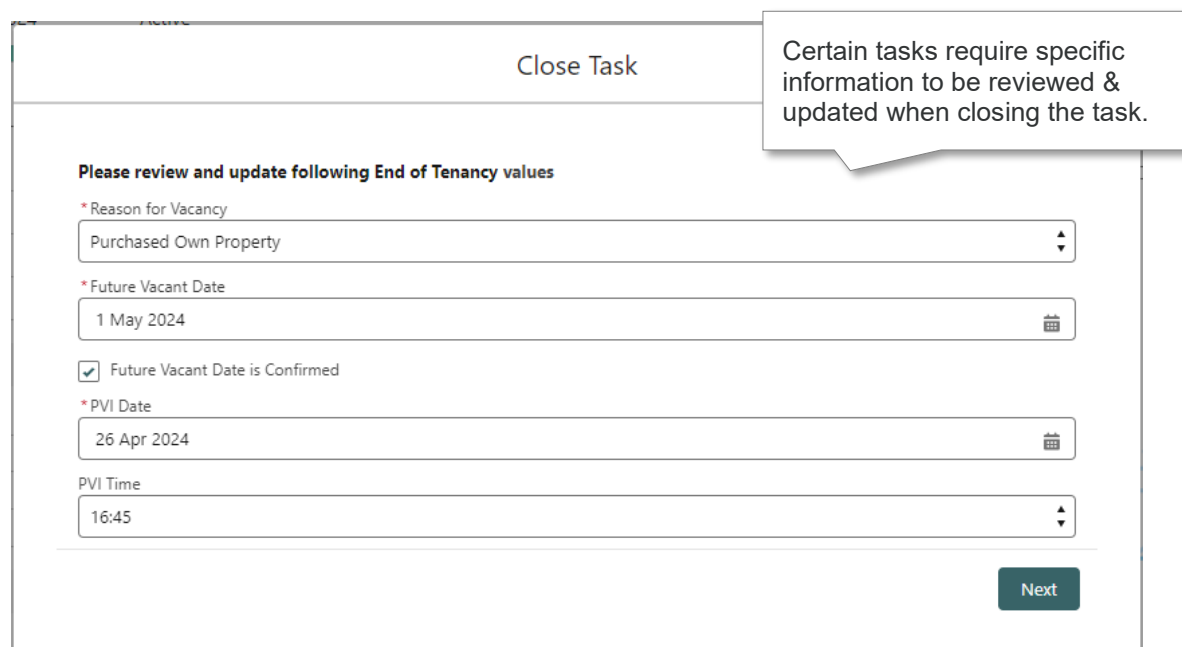
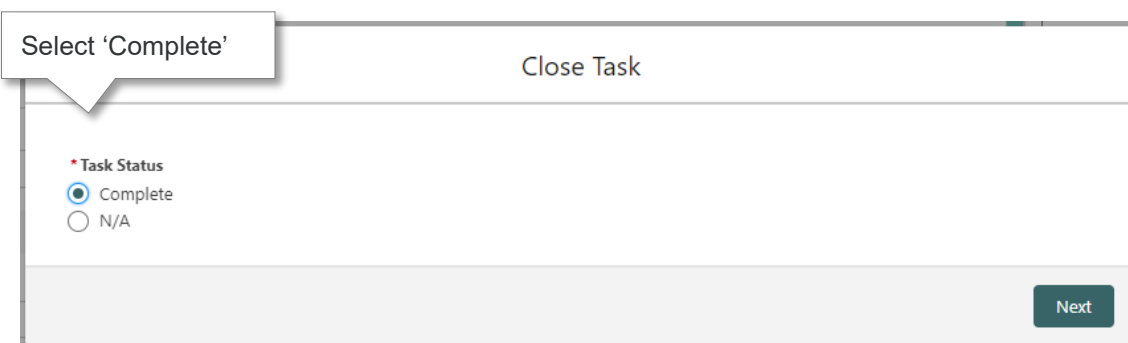
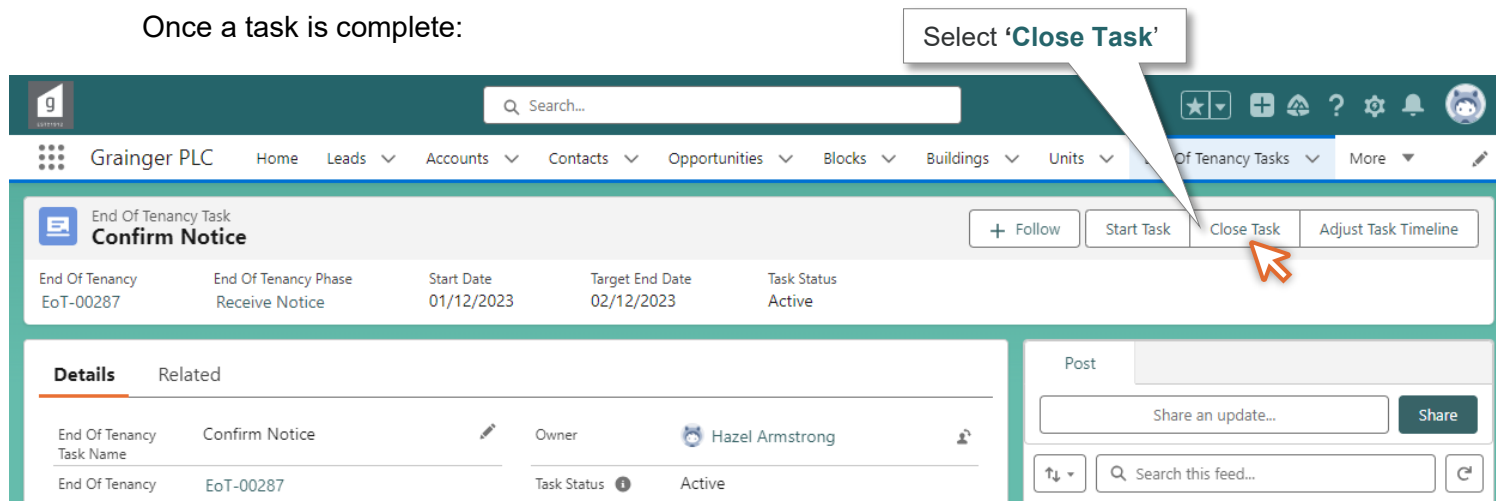
End Of Tenancy: EoT-00290  
End Of Tenancy Phase: Receive Notice  
Start Date: 04/12/2023  
Target End Date: 05/12/2023  
Task Status: Active

**Details** | Related

End Of Tenancy Task Name	Validate Notice	Owner	Abbeville Apartments
End Of Tenancy	EoT-00290	Task Status	Active
End Of Tenancy Phase	Receive Notice	Task Overdue	<input type="checkbox"/>

## 4.5 Completing a Task

Once a task is complete:



If a task is completed 2 or more days late (i.e. after the *Target Due Date*), then a reason for the delayed completion will also be required when completing the task.

**i** You don't need to **start** a task before **completing** it; tasks can be set straight to complete.

(a) Axis Voids

Where an estate is under full Axis contract, users will be prompted to provide additional details that will be sent to Axis ahead of the PVI:

- When the *Confirm PVI Date* task is completed, the user will be required to provide **key location** details for Axis as well as, optionally, enter **PVI-related notes for Axis**.
- When the *Check Out* task is completed, the user will be given the option to update the **key location** details for Axis.

End Of Tenancy  
**EOT - 11 Market Garden, Aldershot, GU11 4BP**

Unit 11 Market Garden, Aldershot, GU11 4BP	Tenancy 00024865	Current Phase Notify Stakeholders	PVI Date 04/06/2024	Future Vacant Date 01/07/2024
---	---------------------	--------------------------------------	------------------------	----------------------------------

✓

Notify Stakeholders

PVI

Book Works

Move Out

Refurb/Refresh

Release Deposit

Complete

Current Phase: Notify Stakeholders

Details

Related

> Information

> Important Dates

▼ Additional Details

Monthly Passing Rent ⓘ	£0.00	Unit to be Relet ⓘ	
Reason for Vacancy ⓘ	Relocation within City	Unit to be Sold ⓘ	
End of Tenancy Works Type ⓘ	Refresh	PVI Notes for Axis ⓘ	

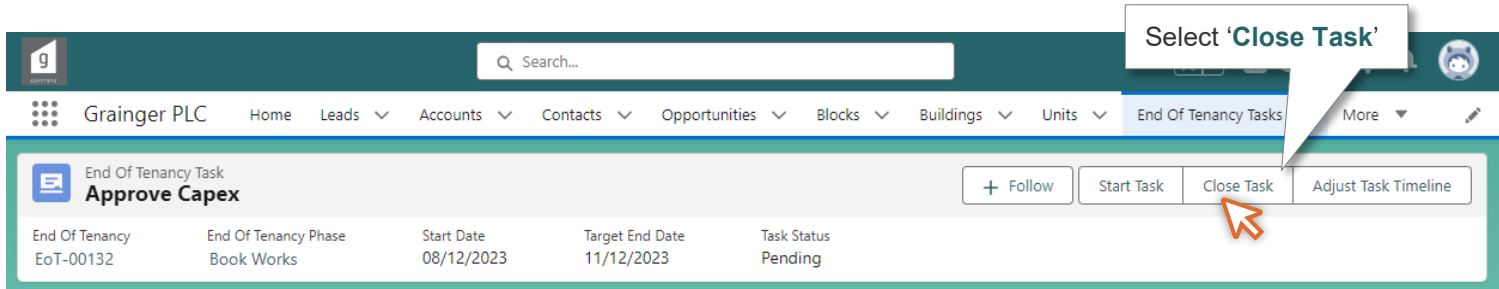
PVI Notes for Axis – This field is only displayed where the estate is under full Axis contract.

Add any information Axis should be aware of prior to the PVI, such as access arrangements.

#### 4.6 Setting Tasks to N/A

Where a task is not relevant for a particular End of Tenancy, the task status can be set to 'N/A'.

- For example, *Approve Capex* tasks may be set to 'N/A' if the refurb or refresh costs are below the threshold requiring approval.
- Tasks set to 'N/A' are not included in the End of Tenancy timeline.



Select 'N/A'

### Close Task

\*Task Status

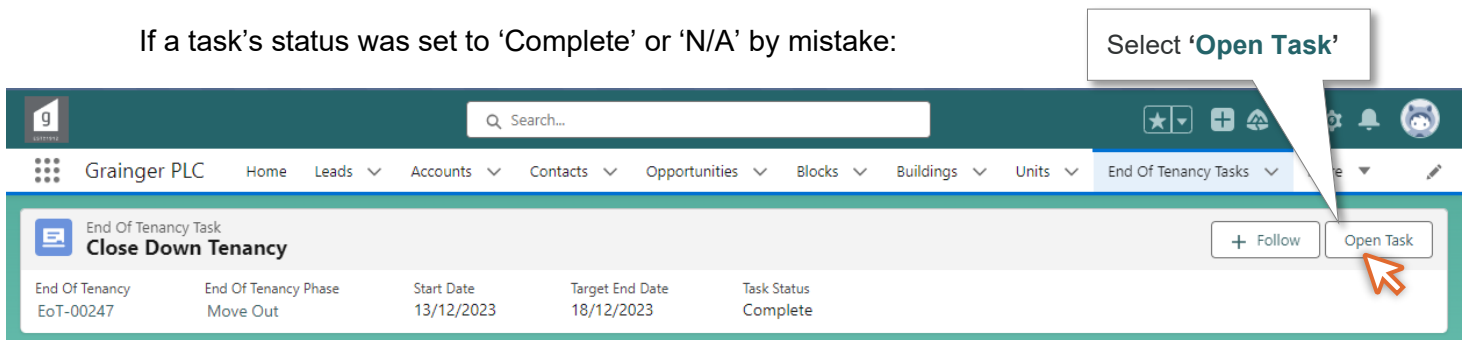
☐ Complete

☒ N/A

Next

#### 4.7 Reopening a Closed Task

If a task's status was set to 'Complete' or 'N/A' by mistake:



Set the task back to the previous status. See [Task Statuses](#) for more information.

### Open Task

\*Select Task Status

☐ Active

☒ In Progress

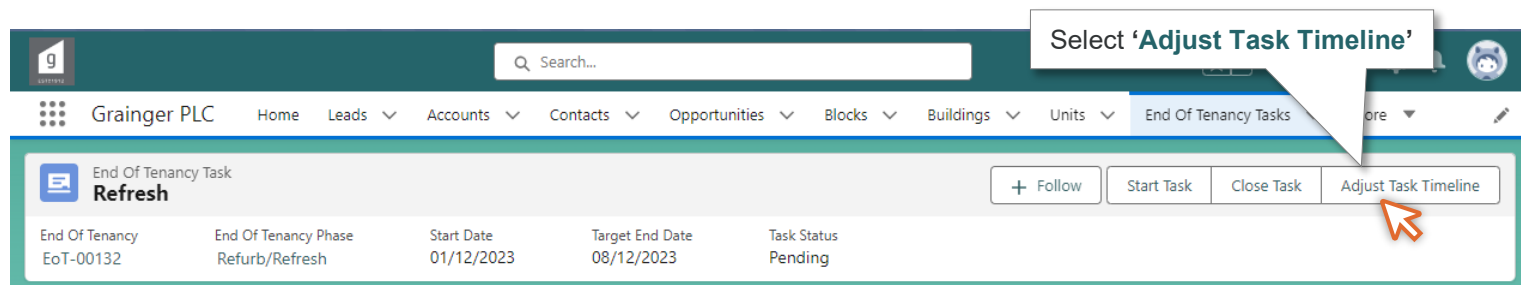
☐ Pending

Next

## 4.8 Expected Delays

Where a task is likely to be delayed, the **expected delay** can be incorporated into the task dates by **adjusting the task timeline**.

- The End of Tenancy's *Available Date*, *Completion Date* as well as any other tasks that are dependent on the delayed task, will be automatically updated to reflect the delayed timelines.



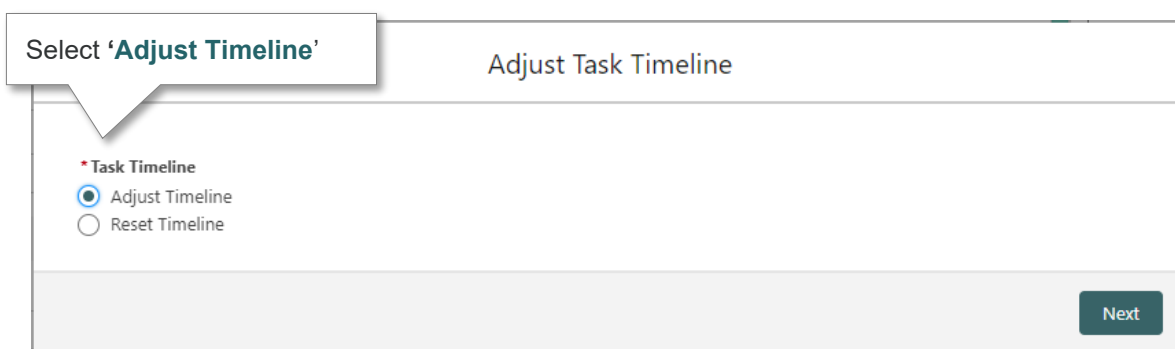
Select 'Adjust Task Timeline'

Grainger PLC Home Leads Accounts Contacts Opportunities Blocks Buildings Units End Of Tenancy Tasks

End Of Tenancy Task Refresh

+ Follow Start Task Close Task Adjust Task Timeline

End Of Tenancy	End Of Tenancy Phase	Start Date	Target End Date	Task Status
EoT-00132	Refurb/Refresh	01/12/2023	08/12/2023	Pending



Select 'Adjust Timeline'

### Adjust Task Timeline

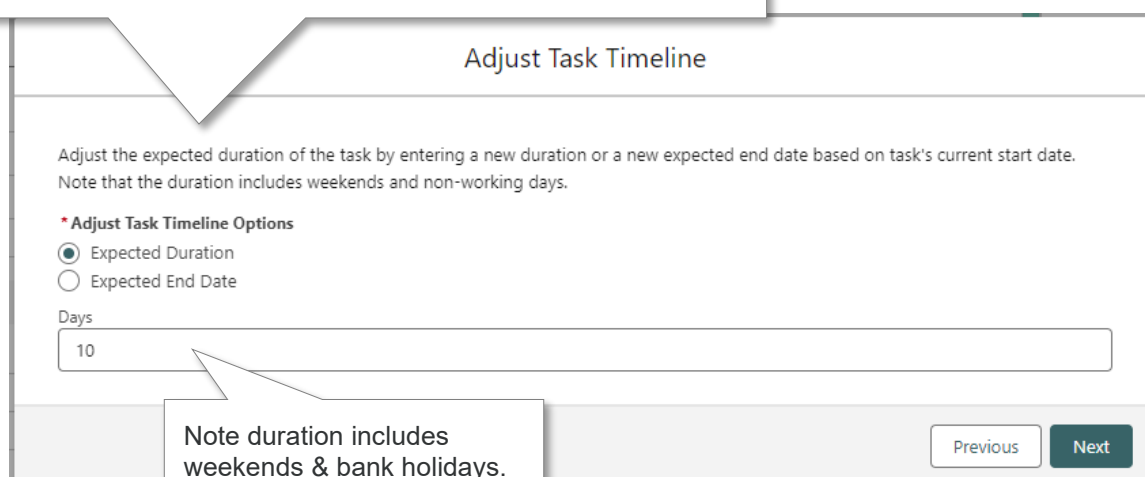
\* Task Timeline

☒ Adjust Timeline

☐ Reset Timeline

Next

The task duration (i.e. number of days that the task is expected to take to complete) can be updated by selecting either a new **Expected Duration** or a new **Expected End Date**.



### Adjust Task Timeline

Adjust the expected duration of the task by entering a new duration or a new expected end date based on task's current start date. Note that the duration includes weekends and non-working days.

\* Adjust Task Timeline Options

☒ Expected Duration

☐ Expected End Date

Days

10

Note duration includes weekends & bank holidays.

Previous Next



**End Of Tenancy Task Refurb**

End Of Tenancy	End Of Tenancy Phase	Start Date	Target End Date	Task Status
EoT-00330	Refurb/Refresh	30/12/2023	19/01/2024	Pending

**Details** Related

End Of Tenancy Task Name	Refurb
End Of Tenancy	EoT-00330
End Of Tenancy Phase	Refurb/Refresh
Unit	7, Barham House, Westminster, London

The task's **Expected Duration** is updated based on the adjustment entered, and the **Target End Date** is updated accordingly.

**Timing**

Start Date	30/12/2023	Expected Duration	Target End Date	19/01/2024
Actual Start Date			Actual End Date	
Expected Duration	20			
KPI Duration	15			

**KPI Duration** reflects the original task duration before any adjustments were made to the task timeline.

**Delay Details**

Expected Delay Days	5	Delay Detail	Overbooked & cannot start on time
Overdue Days	0	Delay Reason	Contractor Delays

**Expected Delay Days:** The number of days by which the task is delayed.

The reason a task is delayed or overdue.

**i** A task's timeline can also be adjusted to be completed **ahead of schedule**. No delay reason needs to be entered when shortening a task's timeline.

To **update** any of the expected delay information: Select 'Adjust Task Timeline' again & follow the above screens again to update the delay information already entered.

To **remove** an expected delay:

Select 'Adjust Task Timeline'

Select 'Reset Timeline'

**Adjust Task Timeline**

**\*Task Timeline**

☐ Adjust Timeline

☒ Reset Timeline

Resetting the timeline will update task's expected duration to the original, KPI duration. Any delay reason and delay detail previously entered will be deleted.

☒ I confirm that I want to reset task's timeline

All delay information is removed from the task on selecting 'Next'. The task's expected duration is reset to the original, **KPI Duration**.

Next

## 4.9 Overdue Tasks & Task Duration

Information about task **timing** & **delays** is displayed as part of the task details. This is derived from how long the task should have taken, any expected delays, as well as how long the task actually took to complete.

**End Of Tenancy Task Details**

End Of Tenancy: EoT-00172 | End Of Tenancy Phase: Book Works | Start Date: 30/11/2023 | Target End Date: 04/12/2023 | Task Status: Complete

**Details** | Related

End Of Tenancy Task Name: Book Works | Owner: [User Icon]

End Of Tenancy: EoT-00172 | Task Status: Complete

End Of Tenancy Phase: [Blank] | Task Overdue: ☒

Unit: [Blank] | Task Team: Centralised PM - Test

**Timing**

Start Date: 30/11/2023 | Target End Date: 04/12/2023

Actual Start Date: 06/12/2023 | Actual End Date: 06/12/2023

Expected Duration: 4 | Actual Duration: 6

KPI Duration: 4 | Start Date Type: Predecessor Task

**Delay Details**

Expected Delay Days: 0

Overdue Days: 2

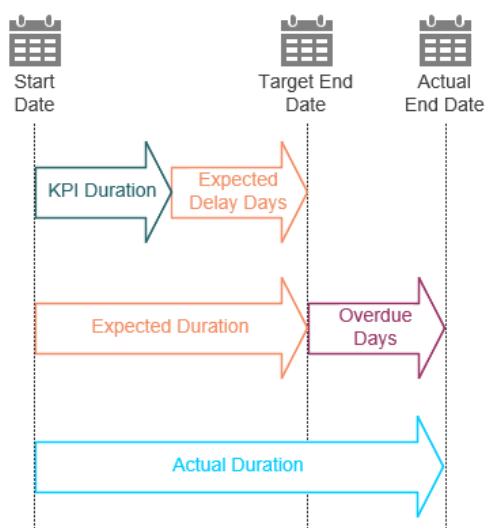
Delay Detail: [Blank] | Delay Reason: Contractor Delays

**Annotations:**

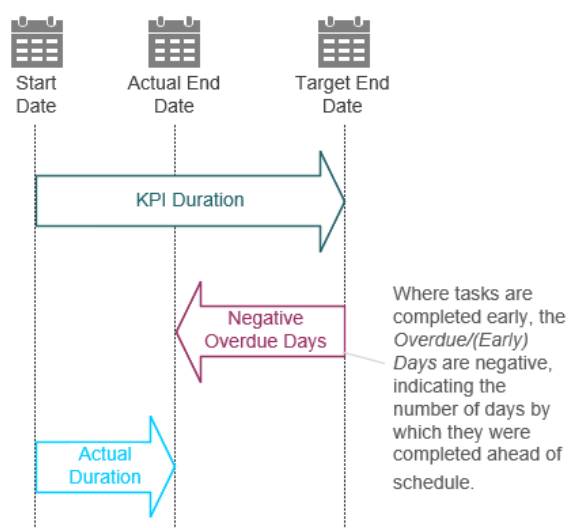
- Actual Duration:** Actual Duration of a task is the number of days from when the task should have started, to when it was completed.
- Overdue:** If a task is not completed by the Target End Date, then it becomes **overdue**.
- KPI Duration:** Number of days this type of task is typically expected to take.
- Overdue Days:** Number of days by which the task is/was overdue.
- Delay Reason:** The reason a task is delayed or overdue.

Below are some examples of how the task dates and durations relate to each other:

### A Delayed Task is Completed Late



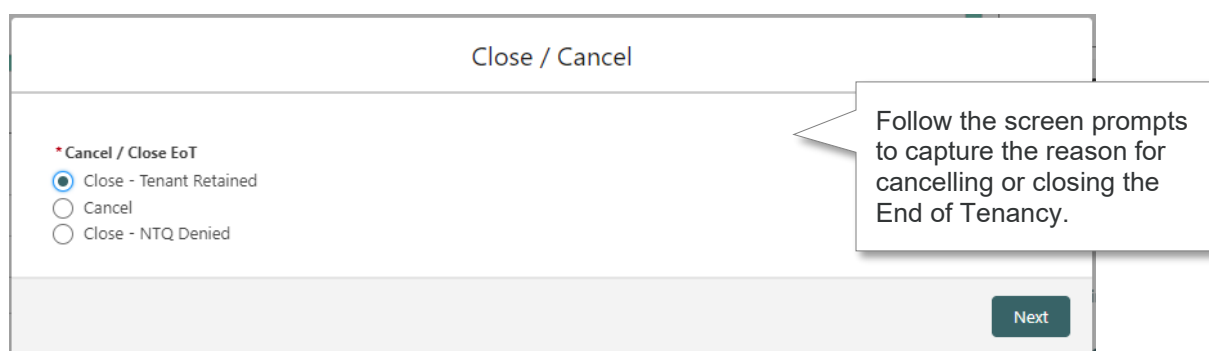
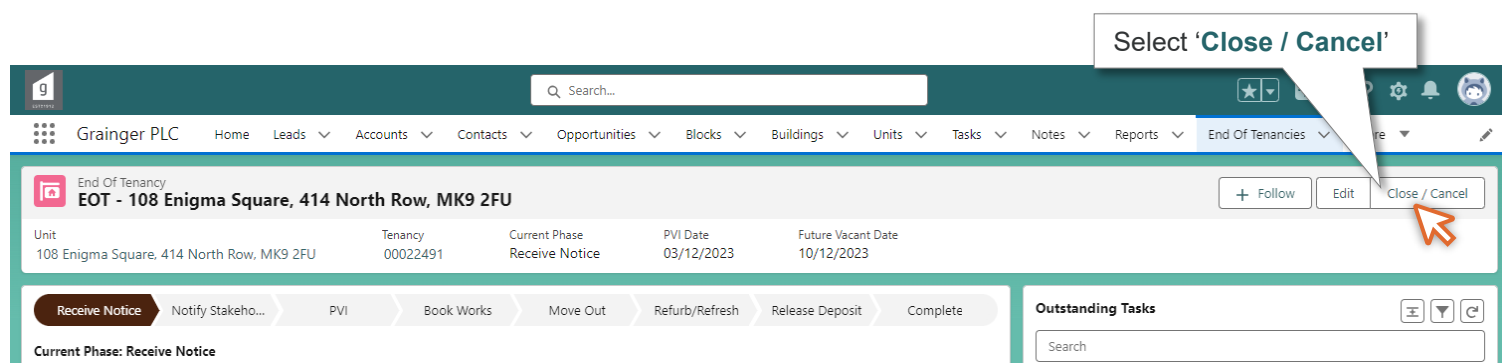
### A Task is Completed Early



## 5. Cancel or Close an End of Tenancy

Once an End of Tenancy has been created, it may be **cancelled** (for example, where created for the wrong unit) or **closed** (for example, if the tenant rescinds their notice to quit).

- Once cancelled or closed, the End of Tenancy & associated tasks can no longer be updated or worked on. The remaining tasks will no longer appear in team/user task lists.



Once the initial **Receive Notice** phase is complete –

- It is possible that the unit may have already been reserved.
- If anyone other than the End of Tenancy Owner follows the above steps after the initial phase, then the End of Tenancy will not be closed immediately; instead a request to close the End of Tenancy will be submitted to the Owner for approval.
  - See [Approving Requests to Cancel or Close an End of Tenancy](#).
- While the request is pending approval, the End of Tenancy will be updated to a **'Pending Cancel/Close'** status and users will not be able to update the End of Tenancy or any associated tasks.
- The requestor will be notified when the request is approved or rejected.

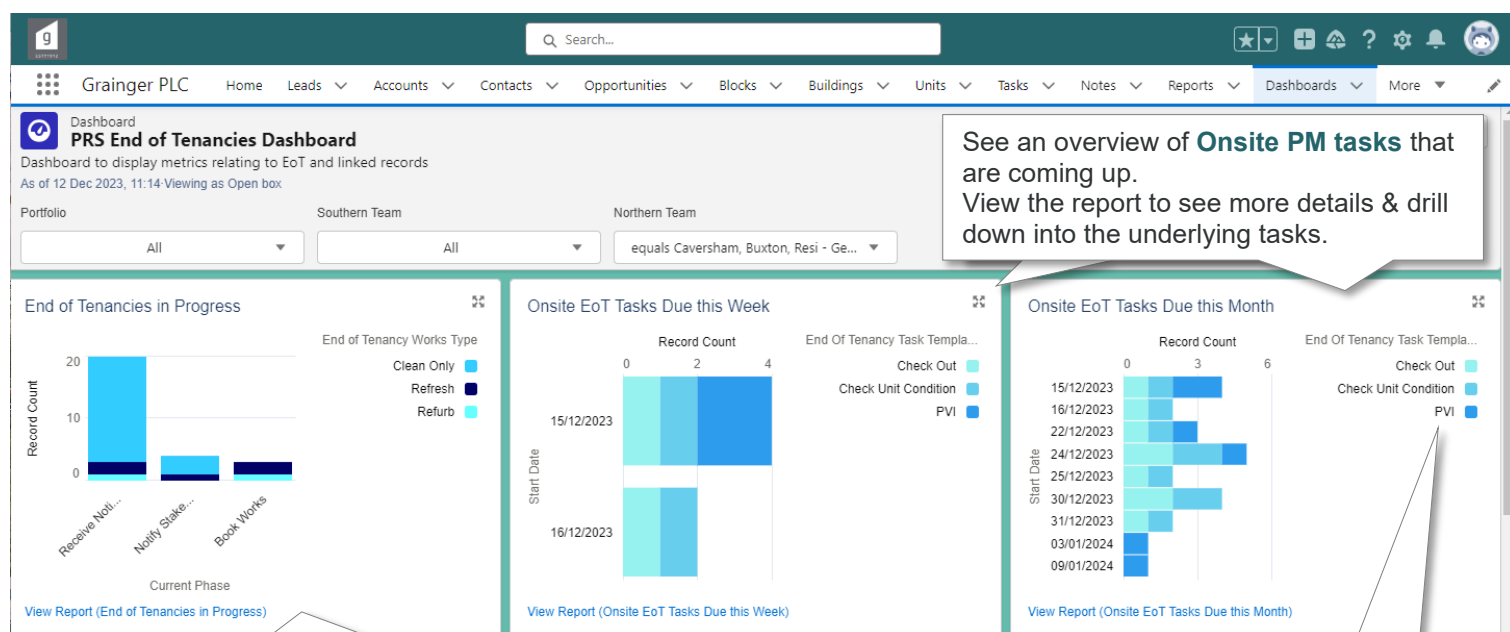
## 6. Reports & Dashboards

Metrics and reports related to End of Tenancies can be found on the following dashboards:

- *PRS End of Tenancy Dashboard*
- *BTR/Vesta End of Tenancy Dashboard*

### 6.1 Onsite Property Management Reports

The following charts and underlying reports can be found on the End of Tenancy dashboards. These may be useful for Onsite Property Management users.

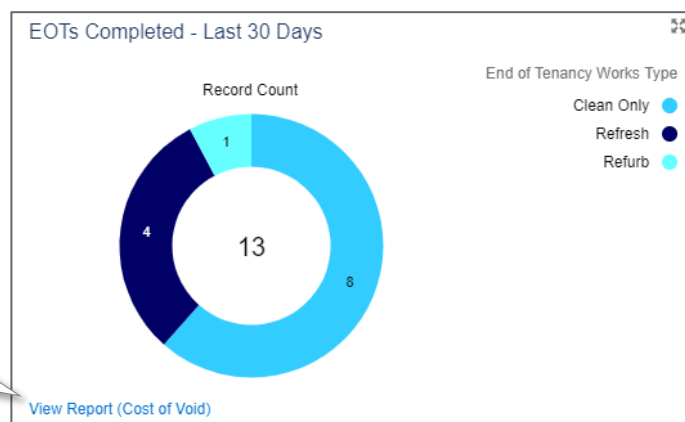


### 6.2 Cost of Void Report

The **Cost of Void Report** can be accessed from the End of Tenancy dashboards.

This report contains key dates in the EOT process, **KPIs** as well as the **void cost** (rent lost) for the time that the unit stood vacant.

Generate the **Cost of Void Report**



### 6.3 Asset Management Reports

A report of **Units Confirmed to be Sold** can be accessed from the **Asset Management: Portfolio Dashboard**.

Access the underlying report



The report displays all units where the notice to quit has already been *validated & confirmed* with the tenant, the unit has been identified as to be sold, and the End of Tenancy is currently in progress.

Report: End of Tenancies with Units  
**Units Confirmed to be Sold**  
Confirmed End of Tenancies in progress where the unit is to be sold

Total Records  
4

<input type="checkbox"/> Start Date ↑	Building Name	Plot No.	End Of Tenancy Number	Owner: Full Name	Current Phase	Available Date
<input type="checkbox"/> 03/11/2023 (1)	Ancoats, Manchester, M4 6BZ	21, Ancoats, 2 Butler Street, M4 6BZ	EoT-00110	Mark Weeden	Notify Stakeholders	20/01/2024
<b>Subtotal</b>						
<input type="checkbox"/> 15/11/2023 (1)	The Headline Apts, Wellington Park Way, Leeds	903, The Headline, Wellington Park Way, Leeds	EoT-00187	James Robertson	Notify Stakeholders	19/11/2023
<b>Subtotal</b>						
<input type="checkbox"/> 21/11/2023 (2)	Solstice Apts, 801 Silbury Boulevard, MK9	207, Solstice Apts, Silbury Boulevard	EoT-00224	James Bell	Close Tenancy	22/11/2023
	The Spectrum, 72-76 Duke St, Liverpool, L1	Apt 30 Spectrum, 72-76 Duke St, Liverpool, L1	EoT-00226	Louise Spooner	Notify Stakeholders	25/11/2023
<b>Subtotal</b>						
<b>Total (4)</b>						

The unit's **Available Date** is **estimated** prior to the completion of works.

## 7. End of Tenancy Owners

### 7.1 Finding My End of Tenancies

All End of Tenancies that are in progress and for which you are the **owner**, can be found under the **End of Tenancies** menu item.

Select the 'My Open End of Tenancies' list.

End of Tenancies  
My Open End of Tenancies

11 items • Sorted by End Of Tenancy Number • Filtered by My end of tenancies - Status • Updated 3 minutes ago

	End Of Ten...	Building	Unit	Tenancy	Current Ph...	Future Vacant ...	Available Date	Completion Date	Notes
1	<input type="checkbox"/> EoT-00298	Abbeville Apartments, 37 London Ro...	Apt 314, Abbeville Apts, 37 London...	00031...	Receive Not...	01/03/2024	05/03/2024	10/03/2024	
2	<input type="checkbox"/> EoT-00297	Trelawney House, Union Street, Lond...	Flat 13, Trelawney House, Union St, ...	00020...	Receive Not...	06/12/2023	10/12/2023	15/12/2023	
3	<input type="checkbox"/> EoT-00296	Barham House, Westminster, W1H 5JA	1, Barham House, Westminster, Lon...	00005...	Receive Not...	01/01/2024	05/01/2024	10/01/2024	
4	<input type="checkbox"/> EoT-00294	Kettlebaston Road, 44, Leyton, E10 7...	44, Kettlebaston Road, Leyton, Lon...	00031...	Receive Not...	22/12/2023	26/12/2023	31/12/2023	
5	<input type="checkbox"/> EoT-00290	Abbeville Apartments, 37 London Ro...	Apt 310, Abbeville Apts, 37 London...	00022...	Receive Not...	31/12/2023	04/01/2024	09/01/2024	

### 7.2 End of Tenancies at Risk

A list of **EoTs at Risk**, for which you are the owner, can be found on the Salesforce **Home** page.

This displays all End of Tenancies which have [overdue tasks](#) and/or [tasks with expected delays](#).

Dashboard  
EoT's at Risk

As of 7 Dec 2023, 17:32 Viewing as Nikki Papenfus

Open Refresh

My EoT with Overdue/Delayed Tasks

End of Tenancy Name ↓	End Of Tenancy Number ↓	Sum of Overdue Days	Sum of Expected Delay Days	Sum of Task Overdue
EOT - 17, Ancoats, 2 Butler Street, M4 6BZ, Flat 17,2 Butler Stre	<a href="#">EoT-00084</a>	433	0	14
EOT - 1 Alliance Cottages, Awbridge,1 Alliance Cottages, Awb	<a href="#">EoT-00090</a>	129	0	8
EOT - 208 Syren Apt , Ottinger Close, Salford M50	<a href="#">EoT-00200</a>	119	6	7
EOT - 219 The Condor, 1 Springwell Sq,219 The Condor,1 Spr	<a href="#">EoT-00066</a>	10	0	3
EOT - 54, Ancoats, 2 Butler Street, M4 6BZ	<a href="#">EoT-00253</a>	8	0	1
EOT - Apt 314, Abbeville Apts, 37 London Rd, Barkin	<a href="#">EoT-00287</a>	5	0	1
<b>Total</b>		704	6	34

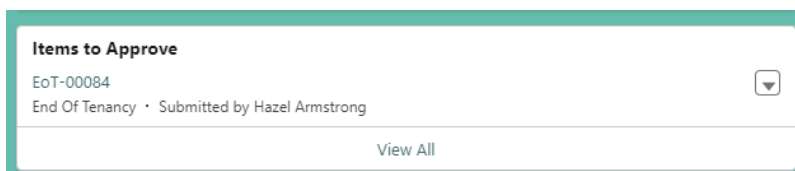
[View Report \(My EoT with Overdue/Delayed Tasks\)](#)

Open the report to see details of all the overdue & delayed tasks.

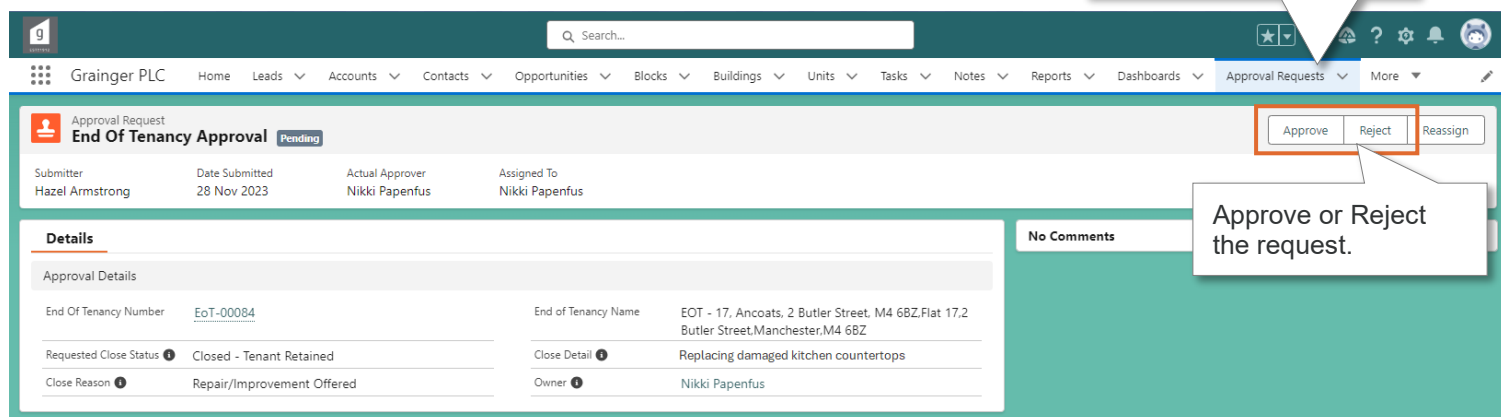
## 7.3 Approving Requests to Cancel or Close an End of Tenancy

Once the initial *Receive Notice* phase is complete, the End of Tenancy owner will be required to **approve** any requests from other users to **cancel or close** an End of Tenancy that is in progress. See [Cancel or Close an End of Tenancy](#) for more detail about this process.

- In addition to receiving email notifications, you can access a list of requests requiring your approval on the Salesforce **Home page**:



Or select the **Approval Requests** menu option to access a list of outstanding requests.



- On **approving** a request, the End of Tenancy will be immediately closed and remaining tasks will no longer appear in team/user task lists.
- On **rejecting** a request, the End of Tenancy will be set back to active and teams will be able to continue working on the tasks.
- The person who submitted the request will be automatically notified of the approval or rejection.