Salesforce Tenant Lifecycle - Proposed High-Level Data Flow

KEY

Data Objects

- Salesforce (Existing)
- Salesforce (New)
- FSI
- Qube

Data Flow

- Existing
- Proposed or Planned Future

Property

Unit

Account
(Leads / Tenants / Guarantors / Occupants)

PVI Task

Maintenance / Wish List Tasks

Inventory Check Out Task

MiMo Task

Move In

Lead

Opportunity: New Lease

Tenancy

Opportunity: Renewal

Void

Lease

Charges

Payments

Tenants

Create

Update

Create, Update

Create Prior to Lease End

Renewal Denied or Unsuccessful

Create: Tenant Denied Renewal, NTQ Received Early

Create & Update

Available Date

Successful Renewal: Update

Tenant Rescinds NTQ

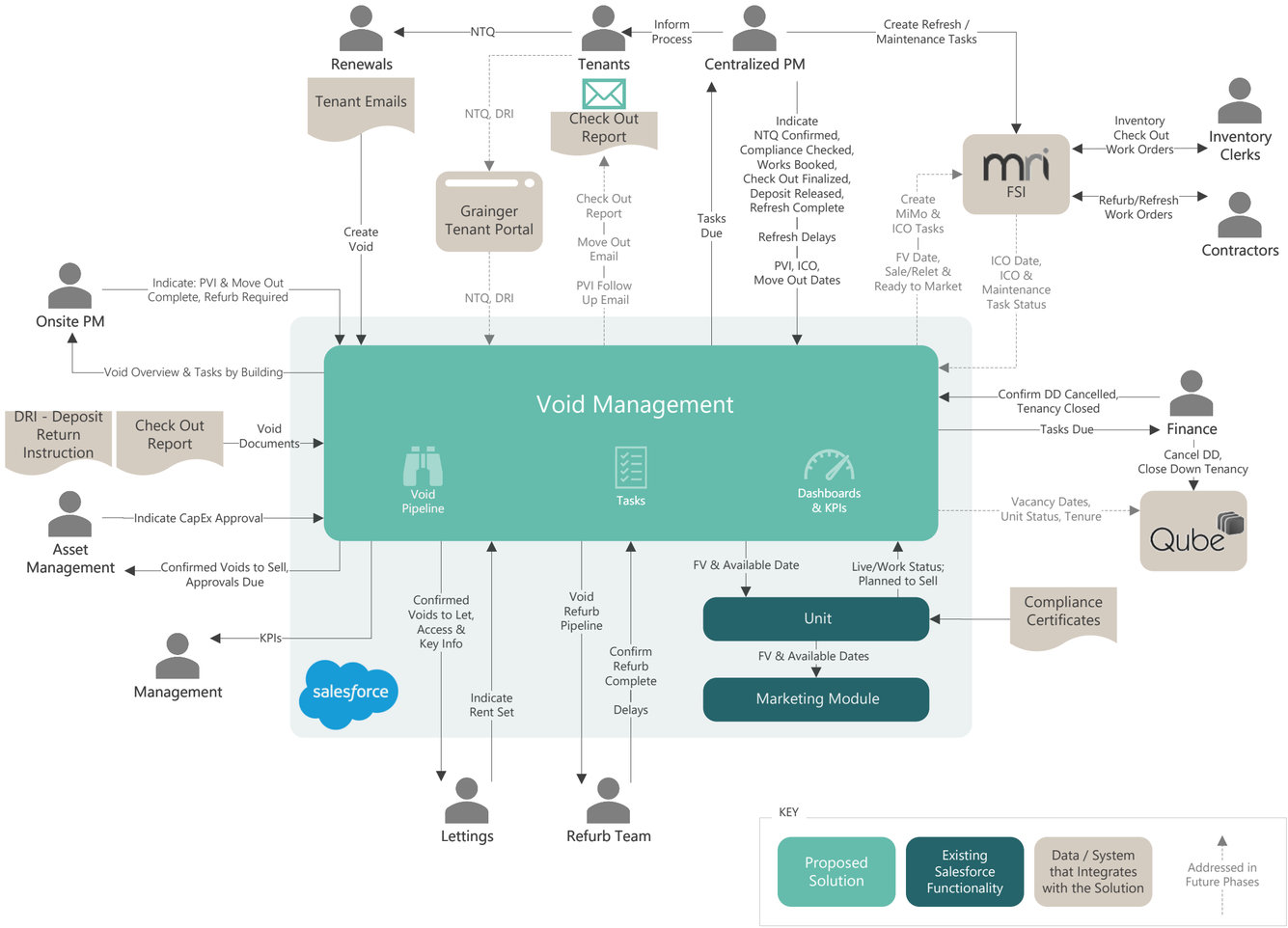
Holding Deposit

Link to Lease

Unit

Property

Void Management - Solution Context Diagram



KEY

Task Set (Related Void Tasks within a Phase)

High-Level Void Task (Details Tracked Outside VM Process)

Custom Start Dates

Milestone Dates

Data Updates (Release 1)

Data Updates (Future Phases)

Mid-Process Triggers: Updates, Set Milestones

Grainger – Void Management Process – Workflow: Unit Void where Tenant has not yet Vacated

	Phases:	Receive Notice	Notify Stakeholders	PVI	Book Works	Move Out	Refurb/Refresh	Close Tenancy	Complete
Renewals	Start - Receive NTQ from Tenant Create Void in Salesforce May also be created by Centralized or Onsite PM	Starts: Void Created		Starts: PVI Date		Starts: Future Vacate Date			
Finance / Cr Control			Starts: *Receive Notice* Phase Complete				Cancel Direct Debit	Close Down Tenancy	
Asset Managemt					Approve CapEx	Only displayed if unit to be refreshed or refurbed. R1: Set status to N/A if not required			
Centralized PM		Validate Notice Confirm Notice	Notify Stakeholders Check Compliance		Book Works		Review Check Out Finalize Check Out Starts: *Finalize Check Out* Complete	Deposit Release	
Letting		This phase & certain check out tasks are not included in the workflow where a tenant has already moved out	Set Rent						
Onsite Property Management			Tasks only displayed if unit to be relet	PVI		Check Property Condition Check Out		Most refresh tasks only displayed if unit to be refreshed. Only unit cleaning task required if no refresh/ refurb required. This may be updated after PVI.	
Mainte-nance Team							Refresh	Refurb tasks only displayed if unit to be refurbed. This may be updated after PVI.	
Refurb Team							Refurb		

Triggers Salesforce Marketing process

Refurb Required

Actual Move Out Date

Delays

Available Date

Integration / Updates

salesforce Unit

- Source Live/ Work Status, Planned to Sell
- Update Status, Reason, Future Vacant & Available Date
- Update Unit/ Lease Status, Tenure, Vacant Due Date
- Create MiMo & Inventory Check Out Tasks
- Update Status & Available Date
- Update Unit Status
- Update Lease Status/Tenure?, Vacant Due & Vacant Dates
- Update Available Date
- Mainte-nance Task(s) Status
- Update Unit Status
- Update MiMo Task: Ready to Market

Qube

mri FSI

Void Management – Proposed Functionality to Estimate & Measure Timelines

1) Create an estimated timeline of work on creation of a void

On creation of a void, phases and tasks are generated. An estimated start & end date is calculated for each task.
Each task is assigned to a team.

Phases automatically close once all underlying tasks are complete.

The next phase & underlying tasks (that do not have a custom start date) automatically start once the prior phases closes.

2) Update estimated timelines as additional information becomes available

Estimated dates (& unit available date) are recalculated as preceding tasks are completed & as key information (such as PVI & FV dates) are captured or updated.

Tasks specified as N/A for a particular void will not be included in timeline.

Expected delays can be captured & incorporated into estimated timeline.

3) Enable users to see when a task is ready to be worked on

Tasks are automatically updated from 'Pending' to 'To Do' status once they are ready to be worked on.
The actual task start date is set, from which KPIs can be measured.
And the estimated end date/due date is updated so that the user knows the timeframe in which they are expected to complete the task.

Tasks appear in user's task list based on the actual start date; not based on current phase.

Work can start on tasks in future phases.

4) Measure time actually taken & provide KPIs

Actual start & end dates for each task are saved and can be compared to the expected duration for key tasks, a set of related tasks or a phase.

The actual unit available date and void completion date can be compared to the original estimates.

Grainger – Void Management Process – Sample dates for a partially completed void

Phases: Receive Notice | Notify Stakeholders | PVI | Book Works | Move Out | Refurb/Refresh | Close Tenancy | Complete

1) Create Void
Refurb Type = Refresh
Relet = Yes
Sale = No
FV Date: 1 Mar 2024
Void Created: 1 Jan 2024

Void Start Date: 1 Jan

Estimated Void Completion Date: 18 Mar

Starts: Void Created → Estimated dates calculated forward from Void Start → Starts: PVI Date ← Estimated PVI date calculated backward from FV Date → Starts: FV Date → Estimated dates calculated forward from FV Date

2) Complete Receive Notice Phase
PVI Date: 5 Feb 2024

Tasks

	Receive Notice	Notify Stakeholders	PVI	Book Works	Move Out	Refurb/Refresh	Close Tenancy
	☑ Validate Notice Expected Duration: 3 Days	☐ Notify Stakeholders Expected Duration: 10 Days	☐ PVI Expected Duration: 7 Days	☐ Approve CapEx Expected Duration: 14 Days	☐ Check Unit Condition Expected Duration: 3 Days	☐ Review Check Out Rpt Expected Duration: 3 Days	☐ Close Down Tenancy Expected Duration: 7 Days
Estimated Task Start & Due Dates:	1 Jan – 4 Jan	~~11 Jan~~ – ~~21 Jan~~ 6 Jan – 16 Jan	~~8 Feb~~ – ~~15 Feb~~ 5 Feb – 12 Feb	~~15 Feb~~ – ~~1 Mar~~ 12 Feb – 26 Feb	1 Mar – 4 Mar	4 Mar – 7 Mar	11 Mar – 18 Mar
Actual Task Start & End Dates:	1 Jan – 5 Jan	6 Jan	5 Feb	1 Mar	1 Mar		
	☑ Confirm Notice Expected Duration: 10 Days	☐ Check Compliance Expected Duration: 10 Days		☐ Book Works Expected Duration: 14 Days	☐ Check Out Expected Duration: 1 Day	☐ Finalize Check Out Expected Duration: 4 Days	Starts: *Finalize Check Out* Complete ☐ Deposit Release Expected Duration: 5 Days
	1 Jan – 11 Jan 1 Jan – 6 Jan	~~11 Jan~~ – ~~21 Jan~~ 6 Jan – 16 Jan 6 Jan		~~15 Feb~~ – ~~1 Mar~~ 12 Feb – 26 Feb 1 Mar	1 Mar – 2 Mar	4 Mar – 8 Mar	8 Mar – 13 Mar
	KPI: Actual vs Expected Task Duration	☑ Set Rent Expected Duration: 5 Days				☐ Refresh Delay (Days): Expected Duration: 7 Days	Expected Available Date: 11 Mar
		~~11 Jan~~ – ~~16 Jan~~ 6 Jan – 11 Jan 6 Jan – 8 Jan				4 Mar – 11 Mar	
						Starts: *Receive Notice* Phase Complete ☑ Cancel Direct Debit Expected Duration: 4 Days	
						~~11 Jan~~ – ~~15 Jan~~ 6 Jan – 10 Jan 6 Jan – 8 Jan	

KEY

Key Events / Milestones | Void Data | Workflow Template Setup | Estimated Dates | Actual Dates | Custom Start Date

Void Management - Proposed Salesforce Data Model

KEY

- Salesforce (Existing)
- Salesforce (New)
- FSI / MRI Evolution
- Qube
- Addressed in Future Phases

Fund
- Fund Name

Estate
- Estate Name

Building
- Building Name
- Finance Queue
- Centralized PM Queue
- Onsite PM Queue
- Asset Management Queue
- Letting Queue
- Maintenance Queue
- Refurb Queue

Opportunity
- Agreed Unit (FK)
- Account (FK)
- Move In Date
- Tenancy End Date
- Term
- Stage (FK)
- Opportunity Type (New, Renewal)

Agreement (Lease Draft)
- Tenancy (FK)
- Agreement Status (FK)

Person Account
- Email
- Qube Tenant ID (Future)

Property

Lease History
- Unit Reference
- Descripton
- Unit Type
- Unit Status
- Tenure
- Lease Start Date
- Lease Term
- Lease End Date

Unit / Current Lease
- Unit Reference
- Descripton
- Unit Type
- Unit Status
- Tenure
- Lease Start Date
- Lease Term
- Lease End Date
- Vacant Due Date (FV)
- Date Vactual (actual move out)
- Letting Due (next move in date)

Unit
- Unit Status
- MRI Unit Status
- Reason
- Other Reason for not Viewing
- Live Work
- Marketing Rent
- Unit to be Sold??
- Future Vacant Date
- Available Date

Tenancy

Document
- Title
- Description
- Created By
- Created Date
- Tile Type
- Tags
- Expiration Date
- Document Type

Void
- Void Name
- Tenancy ID
- Unit ID
- Current Void Phase
- Void Workflow Type (Unit, Tenant Moved Out, Garage/Parking)
- Is Relet
- Is Sale
- Refresh Type (Refurb, Refresh, None)
- Void Status (Active, Complete, Cancelled, Closed-Tenant Retained)
- Void Start Date
- NTQ Date
- Target PVI Date
- PVI Date & Time
- Future Vacate Date & Time
- Actual Move Out Date
- Original Estimated Available Date
- Original Void Estimated End Date
- MiMo Task ID (Future)
- ICO Task ID (Future)
- ICO Date & Time (Future)
- Reason for Vacancy Type
- Void Owner
- Created By/Date
- Last Modified By/Date
- Record Type (Template, Void)

Comment

Unit Notes
- Note Type
- Description
- Details (incl. voids)

Tenant
- Reference
- Name
- Tenant Status
- Email
- Email 2
- Email 3
- Tenant Type
- Commenced (Date)
- Terminates (Date)

MiMo Task
- Building (FK)
- Unit (FK)
- Reporter (Tenant)
- Current Owner (FK)
- Contract (Task Type)
- Expected Vacant Date
- Sell / Relet Status
- Actual Move Out Date
- Ready to Market Status
- Task Status (FK)
- Due Date
- Scheduled Date

Void Phase
- Name
- Record Type (Template, Phase)

User / Queue

Inventory Check Out Task
- Building (FK)
- Unit (FK)
- Current Owner (FK)
- Task Status (FK)
- Due Date
- Scheduled Date

Maintenance / Works Task
- Building (FK)
- Unit (FK)
- Current Owner (FK)
- Task Status (FK)
- Due Date
- Scheduled Date

Void Task
- Name
- Subject
- Task Type (Confirm Notice, Check Out, etc)
- Task Status (Pending, To Do, In Progress, N/A, Complete)
- Queue Type
- Owner (Queue/User)
- Is Property Event
- Relet Task Type (Yes, No, All)
- Sale Task Type (Yes, No, All)
- Refresh Task Type (Refurb, Refresh, None, All)
- Expected Duration
- Estimated Start Date
- Estimated End Date
- Actual Start Date
- Actual End Date
- Comments
- Delay Days
- Delay Reason
- Created By User
- Created Date/Time
- Last Modified User
- Last Modified Date/Time
- Is Active
- Is Custom (Future)
- Record type (Template, Task)
- Custom Start Date Type (Void Start Date, PVI Date, FV Date)
- Predecessor Phase ID
- Successor Task ID