

[CJR-393] SVOT - Keep Tenancies Updated & Synced with Qube Created: 09/Apr/25 Updated: 09/Apr/25

Status:	To Do		
Project:	Customer Journey - Renewals Project		
Components:	None		
Affects versions:	None		
Fix versions:	None		

Type:	Epic	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Issue links:	Cloners clones	CJR-392	SVOT - Provide Single View of Tenancy	To Do
Rank:	2 j01gfr:r			

Description

Grainger - Renewals - Project Proposal v4.0 > Proposed Solution:

- Align Salesforce & Qube Tenancy Data Model – Create the concept of a tenancy in Salesforce that maps directly to existing Qube tenancies.
 - While Qube remains the system of record for tenancies, aligning the data model will provide a single view of all tenants, related parties, associated opportunities and the existing tenancy version history within Salesforce.
 - The solution will maintain an accurate record in Salesforce of which tenancies and tenants are current/active and which have vacated, as well as move in and move out dates for each tenant, that is consistent with Qube.

Features:

- When viewing a master tenancy, users can see a full history of tenants and associated parties.
 - Current & previous tenants are displayed separately.
 - Tenancy contact roles will be created and updated from Qube.
 - New Successor (Regulated), Successor (Assured Periodic) & Power of Attorney contact roles added.
- Unit > *Tenants Contact Details* screen will be updated to display all current tenancy contact roles (as imported from Qube) for residential units.
 - Commercial units: Will display all opportunity contact roles from the most recent, completed opportunity.
- Tenancies created directly in Qube will be pushed to Salesforce via GREP integration.
 - Tenancy fields populated from Qube: PMS Reference ID, Account Name, Unit, Status, Record Status, Latest Contract Start Date (tenancy start date in Qube)
 - If the newly created tenancy has the same PMS Reference ID as any existing opportunities: Automatically link the tenancy to those opportunities & any associated contracts.
- Existing tenancies in Salesforce will be updated from Qube via GREP integration:
 - Fields updated from Qube: Account Name, Unit, Record Status, Latest Contract Start Date (tenancy start date in Qube; may be different to original start date)
 - New tenancies created in Salesforce will be in 'Draft' status. The tenancy will be set to current via the Qube/GREP integration.
- 'Create End of Tenancy' button is accessed from a current tenancy, and no longer from a contract.
 - Available on decant tenancies.
- When actual vacate date is captured via EOT process:
 - The tenancy's *Actual Move Out* date is populated.
 - The activated contract is ended & *Actual Move Out* date is populated
- 'Create Renewal' button is moved from opportunity to tenancy screen.
 - Available to Renewals negotiators.
 - The 'Renewed From' (parent) opportunity is derived from the opportunity that resulted in the currently activated contract.
- A new 'Create Mid-Term COS Opportunity' button is available on the tenancy.
 - The 'Renewed From' (parent) opportunity is derived from the opportunity that resulted in the currently activated contract.
 - A new opportunity will be created with identical logic to the existing 'Create Renewal' function, except with 'Mid Term Change of Sharer' tenancy type.
- A once-off data migration to create all existing, active residential tenancies in Salesforce based on an extract from Qube (excluding *Grnd Rent* tenures):
 - Link the tenancies to any existing opportunities with the same PMS reference ID, as well as any associated contracts.
 - For all remaining tenancies: Link the tenancy to the most recent new lease opportunity for the unit (in Audit or Closed Won status), as well as any subsequent renewal opportunities for the unit (in any status), as well as all associated contracts.
 - Update the status of all signed contracts for 'Closed Won' opportunities that have been linked to a tenancy. Set the last such contract for the tenancy to 'Activated' and any previously signed contracts to 'Ended'.
 - Update tenancy details from its most recent, activated contract: Tenancy Owner, Agreement Type, Document Type, Memorandum of Agreement Date, Tenancy End Date, Actual Move Out Date, Uplift %
 - Update tenancy details from its first contract: Security Deposit Amount
 - Update tenancy details from its most recent contract, if there are any values, otherwise from the first contract: Break Clause, Special Clauses, Special Clause Free Text, Vehicle Make, Vehicle Model, Vehicle Registration
 - If an account has only one tenancy that is not a decant or licence, as well as one or more decants or licenses: Link the decant/license tenancies to the main tenancy.

- Reassign any EOTs in progress from the contract to the tenancy.
- New reports to assist data clean up:
 - Active Tenancies with no Active Contract
 - Active Contracts not linked to a Tenancy
 - Residential Units with no active Tenancy

Exclusions:

- Release 1 will not include any updates to GREP integration or GREP data (including the XREF mapping table).
- Historical tenancy data in Salesforce will not be updated; no master tenancies will be created for former tenancies.

[CJR-392] SVOT - Provide Single View of Tenancy Created: 09/Apr/25 Updated: 09/Apr/25

Status:	To Do
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	None

Type:	Epic	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Issue links:	Cloners			
	clones	CJR-389	SVOT - Create Tenancies in Salesforce...	To Do
	is cloned by	CJR-393	SVOT - Keep Tenancies Updated & Sync...	To Do
Rank:	2 j01gfr:i			

Description**Grainger - Renewals - Project Proposal v4.0 > Proposed Solution:**

- Align Salesforce & Qube Tenancy Data Model – Create the concept of a tenancy in Salesforce that maps directly to existing Qube tenancies.
 - While Qube remains the system of record for tenancies, aligning the data model will provide a single view of all tenants, related parties, associated opportunities and the existing tenancy version history within Salesforce.
 - The solution will maintain an accurate record in Salesforce of which tenancies and tenants are current/active and which have vacated, as well as move in and move out dates for each tenant, that is consistent with Qube.

Features:

- Add 'Tenancies' menu option & a list view of 'All Active Residential Tenancies'
- When viewing a residential tenancy, users can view an overview of all related tenancies as well as the underlying contracts .
- Decants & Parking
 - New 'Create Decant Opportunity' & 'Create License Opportunity' buttons are available on the tenancy screen which create a new lease opportunity.
 - Available to Renewals negotiators, TPT & Lettings.
 - The opportunity is linked to the 'originating tenancy'.
 - When the tenancy for the new decant or license agreement is created, this new tenancy is linked to (is a child of) the originating tenancy.
 - When a new license opportunity is created from another (live unit) opportunity (per the existing process): When the license contract is activated, the new license tenancy is linked to (is a child of) the live unit tenancy.
 - Limitation: The live unit contract should be activated first, thereby creating the live unit tenancy before the license tenancy.
 - Users can manually add/update the link between two tenancies if required.
- When viewing a tenancy, users can see:
 - A full history of contracts
 - A full history of associated opportunities
 - Any opportunities for new decant and license agreements that were created from the tenancy.
- When viewing a unit, the existing *Tenancies* related list is updated to only display residential tenancies & commercial contracts.
- When viewing an account, the existing *Tenancies* related list is updated to only display residential tenancies & commercial contracts.
 - Additional columns displayed to provide more information.

[CJR-389] [SVOT - Create Tenancies in Salesforce that Map to Qube](#) Created: 08/Apr/25 Updated: 09/Apr/25

Status:	To Do
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	None

Type:	Epic	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Attachments:			
Issue links:	Cloners is cloned by CJR-392	SVOT - Provide Single View of Tenancy	To Do
Rank:	2 j01gfr:		

Description

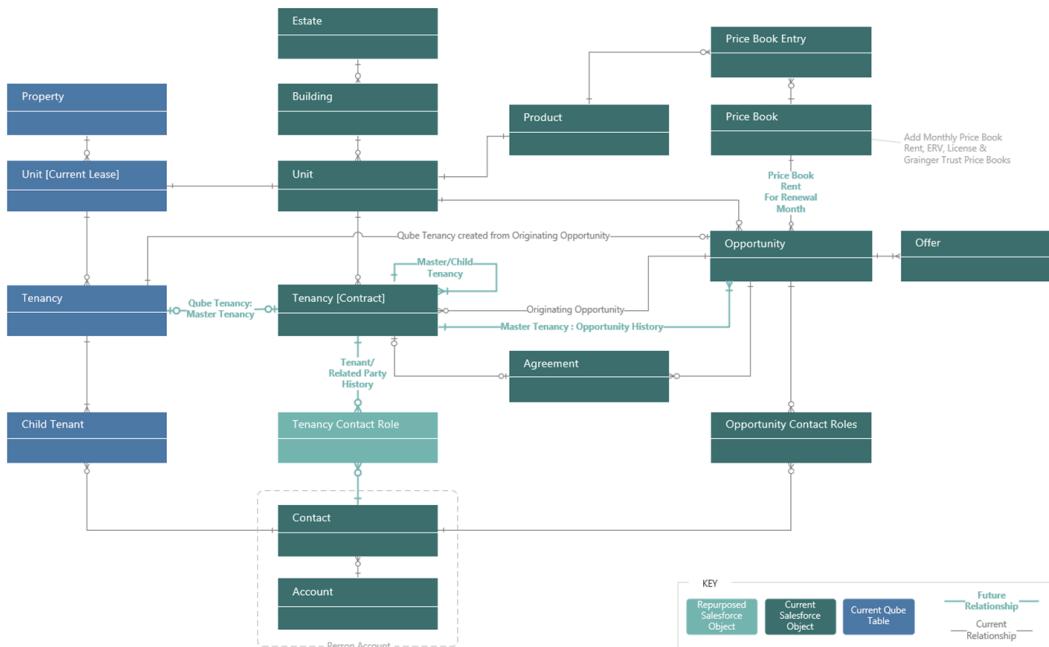
Grainger - Renewals - Project Proposal v4.0 > Proposed Solution:

- **Align Salesforce & Qube Tenancy Data Model – Create the concept of a tenancy in Salesforce that maps directly to existing Qube tenancies.**
 - While Qube remains the system of record for tenancies, aligning the data model will provide a single view of all tenants, related parties, associated opportunities and the existing tenancy version history within Salesforce.
 - The solution will maintain an accurate record in Salesforce of which tenancies and tenants are current/active and which have vacated, as well as move in and move out dates for each tenant, that is consistent with Qube.

Features:

- Create a residential tenancy in Salesforce that maps to a Qube tenancy while maintaining the existing contract version history on the current “tenancy” records.
 - Create new ‘tenancy’ record types: *Residential Contract & Residential Tenancy*.
 - New contracts created from a residential opportunity will have record type ‘Residential Contract’.
- Tenancy statuses in Salesforce will reflect those in Qube: Draft, Future, Current, Previous
- Link opportunities to tenancies: Add un-editable tenancy field to opportunity screen.
- Link contracts to tenancies: Add a tenancy field to the contract screen.
- Create a tenancy on activation of a new lease opportunity’s contract (either on moving to *Audit* stage or manually):
 - Validate that the PMS Reference is saved on an opportunity before it moves to Audit.
 - Save contract details on the new tenancy record.
 - Save the PMS Reference ID on the tenancy.
 - Link the opportunity & all associated contracts to the new tenancy.
- Accommodate new lease opportunities moving back from *Audit* to *Signing* stage:
 - Set any activated contract back to ‘Draft’.
 - When the opportunity moves back to *Audit* and the then signed contract is activated: Update the new tenancy record that has already been created with the activated contract’s details.
- When an agreement is signed, set any previously signed agreements to ‘invalid’.
- Automatically link a renewal created from the ‘Renewal’ button to the previous opportunity’s tenancy.
 - Validate that all renewal opportunities are linked to a tenancy.
 - All contracts created from a renewal opportunity are automatically linked to the tenancy.
- Update tenancies on activation of a *renewal* or *mid term change of sharer* opportunity’s contract (at Closed Won):
 - When a renewal opportunity moves to Closed Won, activate the signed contract.
 - Update tenancy details based on the activated contract; but keeping the original start date & security deposit.
 - Save the new contract’s end date as the tenancy end date. Calculate the tenancy length (from start date until the later of tenancy end date or today; unless it is a previous tenancy then calculate until move out date (if any) otherwise tenancy end date).
 - Update the previously activated contract linked to the tenancy to ‘Ended’.
- Clean up the residential contract page layout / fields displayed.
 - Only display the vehicle details section for parking licences.
- Remove ‘tenancy’ terminology where possible when viewing or referring to a contract.
 - Users should be able to see at a glance when they are viewing a tenancy or a contract: Display record type in the compact layout.
 - Contract screen:
 - Change the label of the “Tenancy Start Date” field to “Start Date” & “Tenancy End Date” field to “End Date”
 - Change the label of the ‘Tenancy Term’ to ‘Contract Term’
 - Change the label of the “Tenancy Status” field to “Record Status”
 - Change the label of the “Tenancy Number” field to “Record Number”

- Opportunity screen:
 - Change 'Create Tenancy' button to 'Create Contract'.
 - Agreement Related list: Change 'Tenancy' column to 'Contract'



[CJR-345] SVOT - Import Current & Passing Rent from Qube Created: 02/Apr/25 Updated: 10/Apr/25

Status:	To Do
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	None

Type:	Epic	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Rank:	2j01gft:
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Description

Grainger - Renewals - Project Proposal v4.0 > Proposed Solution:

Import Passing Rent, renewal denied flag and other relevant tenancy data from Qube into Salesforce which would be visible as part of tenancy information.

Features:

- Passing and current rent will be imported daily from the data warehouse..
 - Note this development is still to be completed by Grainger.*
- The latest passing/previous and current rent can be viewed on each unit.
- Passing/previous and current rent can be viewed on the tenancy, reflecting the latest values while the tenancy is current and final values once the tenancy has ended. <https://graingerplc.atlassian.net/browse/CJR-129>
- Renewal denied flag will be managed on the tenancy.**
 - Replaced by:* Eviction Initiated flag will be managed on the tenancy.
- Source the latest passing rent from the tenancy on creation of an EOT. [Dependent on completion of data warehouse integration.]
- Users can still edit passing/previous and current rent on the unit, until completion of data warehouse integration.

Points: 1

[CJR-336] SVOT - See Current Tenancy Arrears Created: 01/Apr/25 Updated: 10/Apr/25

Status:	To Do
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	None

Type:	Epic	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Unassigned
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Issue color:	purple
Rank:	2 j01gfs:

Description

Grainger - Renewals - Project Proposal v4.0 > Proposed Solution:

See Current Tenancy Arrears – as part of tenancy information.

Features:

- Add a new field to store arrears balance on the tenancy which users can see when viewing a tenancy. <https://graingerplc.atlassian.net/browse/CJR-45>
- A single value will be imported from the data warehouse per tenancy and overwritten on a daily basis.
 - Note this development is still to be completed by Grainger.

Exclusions / Limitations:

- Salesforce will not contain a history of tenancy arrears data or any arrears details. A single value will be imported per tenancy and overwritten on a daily basis.
- Tenant/account-level arrears will not be saved in Salesforce.

Points: 1

Comments

Comment by Nikki [08/Apr/25]

Implementation Approach

- Add a new currency (16,2) field to tenancy , label "Current Arrears"
- Add to Residential Tenancy LRP

[CJR-560] Stop Populating Opportunity ID on Residential Tenancy Created: 30/Apr/25 Updated: 01/May/25 Resolved: 01/May/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Sub-tasks:	Key	Summary	Type	Status	Assignee
	CJR-563	QA	Subtask	Done	
Story point estimate:	1				
Sprint:	CJR Sprint 4				
Rank:	2 j01hoj:				

Description

Issue: Roll up summary errors on the opportunity

Solution: Do not set the Opportunity_c field on tenancy records where _Record Type = 'Residential Tenancy'

A/C 1 - Create a Tenancy when a Contract for a New Lease is Activated

Updates to existing functionality implemented in <https://graingerplc.atlassian.net/browse/CJR-46> & <https://graingerplc.atlassian.net/browse/CJR-194>

GIVEN a contract has a Record Type of 'Residential Contract'

AND the Tenancy Type is 'New'

AND Tenancy is null

WHEN the Status changes to 'Activated'

THEN a new tenancy record will be created with identical details to the activated contract except that:

- Record Type = 'Residential Tenancy'
- Status = Draft
- Tenancy_Statusc = Draft
- Opportunity_c = null

AND the Tenancy field on the activated contract will be updated with the new tenancy record's ID

AND the Tenancy field on the linked opportunity will be updated with the new tenancy record's ID

AND the PMS Reference on the new tenancy record will be populated with the PMS Reference on the linked opportunity

AND the the Tenancy field on the new tenancy record will be populated:

- If the linked opportunity's Originating Tenancy is populated => Use that tenancy ID
- If the linked opportunity's Originating Tenancy is null AND the linked opportunity's Parent Opportunity is populated => Use the _Parent Opportunity's T_enancy ID (if any)
- Otherwise: Null

A/C 2 - Update a Tenancy when a Contract for a New Lease is Activated

Updates to existing functionality implemented in <https://graingerplc.atlassian.net/browse/CJR-194>

GIVEN a contract has a Record Type of 'Residential Contract'

AND the Tenancy Type is 'New'

AND Tenancy is not null

WHEN the Record Status changes to 'Activated'

THEN the Tenancy's record will be updated with identical details to the contract, except for the following fields which will not be updated:

- Record Type
- PMS Reference
- Tenancy_Statusc
- Status
- Latest Contract Start Date
- Opportunity_c - will remain null

AND the Tenancy field on the activated contract will be updated with the tenancy record's ID

AND the Tenancy field on the linked opportunity will be updated with the tenancy record's ID

AND the the Tenancy field on the tenancy record will be populated:

- If the linked opportunity's Originating Tenancy is populated => Use that tenancy ID
- If the linked opportunity's Originating Tenancy is null AND the linked opportunity's Parent Opportunity is populated => Use the _Parent Opportunity's T_enancy ID (if any)
- Otherwise: Null

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

↳ [CJR-520] Data Migration - Update PMS Reference on opportunities in progress Created: 24/Apr/25 Updated: 30/Apr/25

Status:	To Do
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2

Parent:	SVOT - Keep Tenancies Updated & Synced with Qube		
Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Deborah Stein
Resolution:	Unresolved	Votes:	0
Labels:	UAT, UAT_Feedback		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Issue links:	Relates		
	relates to	CJR-479	Data Migration- Missing PMS reference...
Sprint:	CJR Sprint 4		Done
Rank:	2 01i33:		

Description

Provide a report of opps with no PMS ref & have been linked to a tenancy & what the PMS Ref should be.

Update once confirmed.

Comments

Comment by [Jacob Smycz](#) [29/Apr/25]

Hi Deborah Stein assigning this bug back to you as it was a duplicate of one you raised. You can mark the "Grainger Testing" appropriately.

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

[↳ \[CJR-519\] Check/update existing bulk renewal opportunity creation process](#) Created: 24/Apr/25 Updated: 29/Apr/25 Resolved: 24/Apr/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Unassigned
Resolution:	Done	Votes:	0
Labels:	UAT, UAT_Feedback		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Attachments:

Issue links:	Relates		
	relates to	BSS-84	Copy the PMS Reference in the Current...
Grainger Testing:	Pass		UAT Approved
Sprint:	CJR Sprint 3		
Rank:	2 01i37:		

Description

New opportunities created via bulk creation job must be created with PMS reference number and be linked to the tenancy

Comments

Comment by [Jacob Smycz](#) [24/Apr/25]

This was tied up in a support ticket <https://graingerplc.atlassian.net/browse/BSS-84> and will be deployed with the rest of the changes from the CJR project (could not be tied in with work completed for release 1)

cc Nikki Anjali Salecha

Comment by Jacob Smycz [24/Apr/25]

Confirmed with Anjali that this has already been picked up in the project and will be released with the rest of Release 1

Comment by Helen Douglas-Teggart [29/Apr/25]

Pass manually: -

The screenshot shows a software application for managing tenancies. At the top, there's a navigation bar with links for Home, Leads, Accounts, Contacts, Tenancies, Opportunities, Blocks, Buildings, Units, and Task. A search bar is also at the top right.

The main area displays a form for an opportunity named "Test for PMS inclusion". The form fields include:

- Stage:** Post Viewing
- Tenancy Type:** Renewal
- COS Opportunity?**:
- Agreement Type:** Live Work
- Parent Opportunity:** GREP-CoA Kieran Trippier - Flat 17 Eagle House, Eagle Wharf Road, London
- Tenancy:** 00055201
- Processed By GREP:** Not Processed
- Passing Rent Checked In Qube:**
- Passing Rent:**
- Close Date:** 30/04/2025
- Lead Source:**
- Adverse Credit?:**
- Household income at least 30x rent**
- Is Guarantor Required**
- Number of occupants**
- Opt out of Green Lease**:
- Suppress Automated Renewal Chase Emails**:
- PMS Reference:** 418575017003

Pass bulk:

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings Units Task

Opportunity
Renewal Parking 32 - Level 0, Gatehouse Apartments 2024-05-08

Create Offers Edit Log

Renewal Parking 32 - Level 0, Gatehouse Apartments 2024-05-08	Sophie Farr
Account Name i	Second Opportunity Owner
Herbert Chen	TPT / Renewal User
Stage	Close Date
Post Viewing	03/07/2025
Sub Stage	Lead Source
Tenancy Type	Adverse Credit?
Renewal	Household income at least 30x rent
COS Opportunity? i	Is Guarantor Required
<input type="checkbox"/>	Number of occupants
Agreement Type	Opt out of Green Lease
Parking Licence	<input type="checkbox"/>
Parent Opportunity i	Suppress Automated Renewal Chase Emails i
GREP-CoA Herbert Chen - Parking 32 - Level 0	<input type="checkbox"/>
Tenancy	PMS Reference i
Processed By GREP i	222661032003
Not Processed	
Passing Rent Checked In Qube	
<input type="checkbox"/>	
Passing Rent	

Upcoming
Get started
No past activity

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings

Opportunity **Renewal Parking 32 - Level 0, Gatehouse Apartments 2024-05-08** **Create C**

Payments (0) **New**

Opportunity Field History (1)

Date	Field	User	Original Value	New Value
03/04/2025, 08:00	Created.	Grainger Automated Process		

[View All](#)

Stage History (1)

Stage	Amount	Probability (%)	Expected Revenue	Close Date	Last Modified By	Last Modified
Post Viewing	£0.00	30%		03/07/2025	Grainger Automat...	03/04/2025, 08...

[View All](#)

Files (0) **Add Files**

[Upload Files](#)
Or drop files

Tenancy Payment Schedules (0) **New**

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

[\[CJR-516\] Data Migration - Tenancy Contact Roles](#) Created: 24/Apr/25 Updated: 29/Apr/25 Resolved: 29/Apr/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Matthew Cornfield
Resolution:	Done	Votes:	0
Labels:	Scope_Creep, UAT, UAT_Feedback		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Attachments:	
Sprint:	CJR Sprint 4
Rank:	2 j01hy7:

Description

Name	Status	unit_referral	unit_description	unit_status	unit_tenure	Unit_Type	tenancy_commenced	tenancy_terminated	tenant_info	tenant_type
Khyer Mohammad Khairkhw	Current	107520007	50, Mayford Road, Manchester	Tenanted	ChiefRent	Mid Terrace	25 Dec 1899	24-Dec-89	003Nz00000BNkOrIAl	Tenant
Deborah Jane Kelly & Stever	Current	110744001	49, Queens Place, Ramsbottom, Lancashire	Tenanted	ChiefRent	Mid Terrace	10 May 1898	n/a		Lead Tenant
Deborah Jane Kelly	Current	110744001	49, Queens Place, Ramsbottom, Lancashire	Tenanted	ChiefRent	Mid Terrace	10 May 1898	9-May-97	003Nz00000x0dmIA	Tenant
Steven John Woodward	Current	110744001	49, Queens Place, Ramsbottom, Lancashire	Tenanted	ChiefRent	Mid Terrace	10 May 1898	n/a	003Nz00000x4j0IA	Tenant
Hannah Marie Paterson	Current	104400001	85, Godstone Road, Twickenham, Middlesex	Tenanted	Grnd Rent	Flat PB	2025-12-13	18-Jan-25	003Nz000000TVkQJAX	Tenant
Carlos Montes Toyo	Current	222648191	2006, Neon House, 207 Chapel St, Salford, M3	Tenanted	AST	Flat PB	2025-04-01	n/a	003Nz00000WQG1IAH	Tenant
Daniel Christopher Harrisson	Current	217371088	Apt 152, Kings Dock Mill, Liverpool, L1	Tenanted	AST	Flat PB	2025-03-27	n/a	003Nz00000UwFF4IA	Tenant
Murat Kurut	Current	217371055	Apt 104, Kings Dock Mill, Liverpool, L1	Tenanted	AST	Flat PB	2025-03-26	n/a	003Nz00000WV2BEIA	Tenant
Frances Hewitt Asquith	Current	222799006	Flat 6, The Astley, 61 Houldsworth St, Manc	Tenanted	AST	Flat PB	2025-03-24	n/a	003Nz00000W6ZtQIAF	Tenant
Connor Elliot Dean	Current	222580004	104 Tayleur Apt, Waterman Wlk, Salford M50	Tenanted	AST	Flat PB	2025-03-23	n/a	003Nz00000VwXMMIAN	Tenant
Moshe Shen and Li Guo	Current	103086002	28, Amwell St, Flat 2, London EC1	Tenanted	Grnd Rent	Flat PB	1-Jan-12	n/a		
Moshe Shen	Current	103086002	28, Amwell St, Flat 2, London EC1	Tenanted	Grnd Rent	Flat PB	1-Jan-12	n/a	0034J00000a4Yy4QAE	
Li Guo	Current	103086002	28, Amwell St, Flat 2, London EC1	Tenanted	Grnd Rent	Flat PB	1-Jan-12	n/a	0034J00000a4Z42QAE	
Mr Ronuk Vassant	Current	103086003	28, Amwell St, Flat 3, London EC1	Tenanted	Grnd Rent	Flat PB	26-Jan-15	n/a		
Mr Ronuk Vassant	Current	103086003	28, Amwell St, Flat 3, London EC1	Tenanted	Grnd Rent	Flat PB	26-Jan-15	n/a	0034J00000a4Z47QAE	
Ms Carol Ann Parker	Current	103086004	28, Amwell St, Flat 4, London EC1	Tenanted	Grnd Rent	Flat PB	1-Jan-12	n/a		
Ms Carol Parker	Current	103086004	28, Amwell St, Flat 4, London EC1	Tenanted	Grnd Rent	Flat PB	1-Jan-12	n/a	0034J00000a4Z4uQAE	
Ms Noa Burger	Current	103086005	28, Amwell St, Flat 5, London EC1	Tenanted	Grnd Rent	Flat PB	20-Dec-12	n/a		
Ms Noa Burger	Current	103086005	28, Amwell St, Flat 5, London EC1	Tenanted	Grnd Rent	Flat PB	20-Dec-12	n/a	0034J00000a4Z4GQAU	

[CJR-450] Change Full Name on Units Tenants Contact Details to come from Contact ID instead of the Tenancy Contact

Role Name Created: 15/Apr/25 Updated: 17/Apr/25 Resolved: 17/Apr/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2

Type:	Story	Priority:	Priority 3
Reporter:	Sarah Jessiman	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	UAT, UAT_Feedback		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:											
Sub-tasks:	<table border="1"> <tr> <th>Key</th> <th>Summary</th> <th>Type</th> <th>Status</th> <th>Assignee</th> </tr> <tr> <td>CJR-454</td> <td>QA</td> <td>Subtask</td> <td>Done</td> <td>Mudzunga Khonani Davhana</td> </tr> </table>	Key	Summary	Type	Status	Assignee	CJR-454	QA	Subtask	Done	Mudzunga Khonani Davhana
Key	Summary	Type	Status	Assignee							
CJR-454	QA	Subtask	Done	Mudzunga Khonani Davhana							
Grainger Testing:	Pass										
Sprint:	CJR Sprint 3										
Rank:	2 j012pb:000000zx00004										

Description

At the moment when Tenancy Contact Roles are added from Grep, Tenancy Contact Role Name Field gets populated with an Id

Hence the Full Name is the Id and not the actual Name

Unit
105 North, The Forge, Newcastle, NE1 3AA

Building The Forge Apts, North, Newcastle, NE1 3AA	Block Forge - North Apartments	Unit Status Tenanted	Bedrooms 2 Bedrooms	Bathrooms 2
---	-----------------------------------	-------------------------	------------------------	----------------

Unit Details Lettings And Marketing Property Management **Tenants Contact Details** Key Documents More

Role: Permitted Occupier **Full Name:** a2iPv00000Cwdjy **Phone / Mobile:** 07000000014/ **Email:** lewishallnufc@graingerplc.com

Could we change this so that Full Name comes from the Contact Id instead of the Tenancy Contact Role Name since its populated as just an Id when it comes from G

You're welcome
Sarah Jessiman, 13:51

Tenancy Contact Role
a2iPv00000Cwdjy

Details

Tenancy Contact Role Name	a2iPv00000Cwdjy	Start Date
Contact ID	Lewis Hall	End Date
Role	Permitted Occupier	Contract ID
Other		
Relationship		

System Information

Created By	GREP Integration User, 10/04/2025, 13:40	Last Modified By
External Id	222676005005_003Pv00000laFlmIAE	

Relates to: <https://graingerplc.atlassian.net/issues/CJR-180?filter=10991@>

Comments

Comment by Sarah Jessiman [15/Apr/25]

Discussed with Jacob and Khonani on this possibly been an enhancement/ update to this existing flow

Comment by Elisabeta Mihalache [17/Apr/25]

Unit
9 Hugo Hse, Purkis Rd, Waterlooville, PO7 3DZ

Building Hugo Hse, Purkis Rd, Waterlooville, PO7 3DZ	Block GT - Berewood 9a	Unit Status Tenanted	Bedrooms 1 Bedroom	Bathrooms	Priority Flag
---	---------------------------	-------------------------	-----------------------	-----------	---------------

Unit Details Lettings And Marketing Property Management **Tenants Contact Details** Key Documents Related

Role:
Lead Tenant

Full Name:
Rodney Blind

Phone / Mobile:
07777777777/07777777777

Email:
003pv00000le7kkia

Tenancy
Rodney Blind

Record Type Residential Tenancy	Agreement Type	Unit 9 Hugo Hse, Purkis Rd, Waterlooville, PO7 3DZ	Start Date	Tenancy End Date
------------------------------------	----------------	---	------------	------------------

Details Related **Tenants**

Current Tenancy Contact Roles (1)

1 item • Filtered by End Date • Updated a few seconds ago

<input type="checkbox"/> Contact ID	Role
1 <input type="checkbox"/> Rodney Blind	Lead Tenant

[View All](#)

Previous Tenancy Contact Roles (0)

[Details](#)
[Related](#)
[Tenants](#)
 Contracts (0)

 End Of Tenancies (0)

 Opportunities (1)

1 item • Updated a few seconds ago

Opportunity Name

1 GREP-CoA Rodney Blind - 9 Hugo Hse, Purkis Rd, Waterlooville, PO7 3DZ

[View All](#)
 Tenancy History (1)

Date	Field	User
11/04/2025, 16:53	Created.	GREP Integration User

[View All](#)

Tenants Contact Details, Current Tenancy Contact Roles Contact ID display the full name

Comment by Elisabeta Mihalache [17/Apr/25]

this ticket passes, however, Helen Douglas-Teggart could you please confirm if this is what you wanted to see in [CJR-180?](#)
Jacob Smycz Sarah Jessiman Mudzunga Khonani Davhana

[SVOT - Keep Tenancies Updated & Synced with Qube \(CJR-393\)](#)[\[CJR-418\] Data Migration - Include Ground Rent Tenancies](#) Created: 10/Apr/25 Updated: 23/Apr/25 Resolved: 14/Apr/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, UAT, UAT_Feedback		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Attachments:			
Issue links:	Blocks is blocked by	CJR-47 Data Migration - Create Tenancy for a...	Done
Grainger Testing:	Pass		
Story point estimate:	2		
Sprint:	CJR Sprint 3		
Rank:	2 012pb:000000zx01		

Description

Ground rent tenures should not be excluded from data migration.

Remove this exclusion from <https://graingerplc.atlassian.net/browse/CJR-47> :

A/C 1 - Create Residential Tenancies in Salesforce from Qube Extract

CREATE one new Contract record for each unique Qube Tenancy ID provided in the Qube data extract (regardless of whether or not it maps to any existing opportunities or contracts in Salesforce)

- WHERE Con Tran = 'Sharer'
- AND exclude Unit Tenure = 'Gmd Rent'

Comments

Comment by Helen Douglas-Teggart [23/Apr/25]

Ground Rent tenancies created - pass

The screenshot shows a Salesforce page for a residential tenancy record. The top navigation bar includes links for Add Successor & POA, Report Builder, 00057343 | Tenancy | Salesforce, 00081574 | Tenancy | Salesforce, Home, Leads, Accounts, Contacts, Tenancies, Opportunities, Blocks, Buildings, Units, Tasks, Reports, Dashboards, and a search bar. The main content area displays the details for a tenancy record for Charlotte Thompson, with fields for Record Type (Residential Tenancy), Agreement Type, Unit (63 Woodleigh Gardens, Streatham, London), Start Date (25/01/2018), and Tenancy End Date. Below this, the Details tab is selected, showing sections for Tenancy Overview, Details, and Additional Information. The Details section contains fields for Tenancy Owner (Open box), Account Name (Charlotte Thompson), Tenancy Length (Months) (87), Start Date (25/01/2018), Latest Contract Start Date, Tenancy End Date, Actual Move Out Date, Record Status (Current), Agreement Type, Document Type, Memorandum of Agreement, Arrears, GPLC Notice Initiated, Current Rent, Security Deposit Amount, and TDS Reference.

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

↳ [CJR-415] Undo - Update Data Migration to Populate Qube Tenure as Agreement Type Created: 10/Apr/25 Updated: 15/Apr/25 Resolved:

15/Apr/25

Status:	Done
Project:	Customer Journey - Renewals Project

Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Matthew Cornfield
Resolution:	Done	Votes:	0
Labels:	OpenBox, Scope_Creep		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Issue links:	Blocks	BAU - Add New Agreement Types - Sprint 2	To Do
	is blocked by	CJR-413	
	Relates		
	relates to	CJR-47	Data Migration - Create Tenancy for a...
Story point estimate:	1		Done
Sprint:	CJR Sprint 3		
Rank:	2 j012pb:000000zx0009		

Description

Update <https://graingerplc.atlassian.net/browse/CJR-47> A/C 1 - Create Residential Tenancies in Salesforce from Qube Extract

WHEN creating the new residential tenancy records in Salesforce
 THEN populate the *Agreement Type* with the exact Qube tenure value
 AND it is not longer necessary to populate the *Description* with the Qube tenure.

Comments

Comment by Nikki [15/Apr/25]
Matthew Cornfield hold on this - it's likely going to change. sorry.
Comment by Matthew Cornfield [15/Apr/25]
Nikki do we have an ETA on when it will change as it will affect the Qube extract migration today
Comment by Nikki [15/Apr/25]
Matthew Cornfield trying to get a meeting with Grainger today to discuss & resolve. Will likely go back to the old Agreement Type logic & create a new field for Tenure Type.
Comment by Matthew Cornfield [15/Apr/25]
Nikki Okay cool, for now have reverted to the old logic
Comment by Nikki [15/Apr/25]
Matthew Cornfield Confirmed we should keep the old logic.
Comment by Matthew Cornfield [15/Apr/25]
Nikki Are we still populating the description with the Qube tenure?
Comment by Nikki [15/Apr/25]
Matthew Cornfield Yes please

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)			
↳ [CJR-391] Add Successor & POA Contact Roles Created: 09/Apr/25 Updated: 23/Apr/25 Resolved: 10/Apr/25			
Status:	Done	Priority:	Priority 3
Project:	Customer Journey - Renewals Project	Assignee:	Sarah Jessiman
Components:	None	Votes:	0
Affects versions:	None		
Fix versions:	Sprint 2		
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube		

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Sarah Jessiman
Resolution:	Done	Votes:	0

Labels:	OpenBox, UAT, UAT_Feedback			
Σ Remaining Estimate:	Not Specified		Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified		Time Spent:	Not Specified
Σ Original Estimate:	Not Specified		Original estimate:	Not Specified
Attachments:				
Issue links:	Relates relates to CJR-118 Create & Update Tenancy Contact Roles... To Do			
Sub-tasks:	Key	Summary	Type	Status
	CJR-420	QA	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	0.5			
Sprint:	CJR Sprint 3			
Rank:	2 j012pb:000000zx0r			

Description

UAT Feedback: For Tenancies where the Tenure is "regulated" then the tenant may have an occupier type of "successor reg". For tenancies where the tenure is Assd per (assured periodic), the tenant may have the occupier type of "Successor Assd Per". We also have "tenants" listed in Qube as POA (Power of Attorney). As we are now passing all of the tenants to Salesforce including the Regulated and Assured Periodic in order to see a SVOT, should we not be capturing these contact roles in Salesforce and mapping them from Qube to SF via the GREP mapping. The mapping table above did not include them because we have never set up tenancies for these tenure types on Salesforce until now.

A/C 1 - Add New Contact Roles

Add new Roles to the **tenancy contact role** and **opportunity contact role** objects:

- Successor (Regulated)
- Successor (Assured Periodic)
- Power of Attorney

Comments

Comment by [Matthew Pitcairn](#) [10/Apr/25]

[Nikki](#) I see the relationship field on both objects is dependant on the Role value choice

Tenancy Contact Role
test test 45 6

Details

Tenancy Contact Role Name test test 45 6	Start Date 21/02/2025
Contact ID test test 45	End Date
Role Successor (Regulated)	Contract ID 00043949
Other	
Relationship	

Do we know if these new role options need to show the same relationships?

Showing Columns: 1 - 8 (of 8) View sets of 5						
Role:	<u>Lead Tenant</u>	<u>Tenant</u>	<u>Permitted Occupier</u>	<u>Guarantor</u>	<u>Relevant Person</u>	<u>Successor</u>
Relationship:	Spouse	Spouse	Spouse	Spouse	Spouse	S
	Partner	Partner	Partner	Partner	Partner	P
	Other	Other	Other	Other	Other	O
	Company Employee	Company Employee	Company Employee	Company Employee	Company Employee	C
	Child	Child	Child	Child	Child	C

Showing Columns: 1 - 8 (of 8) [View sets of 5](#)

Comment by [Nikki](#) [10/Apr/25]

Hi [Matthew Pitcairn](#) , yes I think that makes sense to keep the same relationship options. Tx

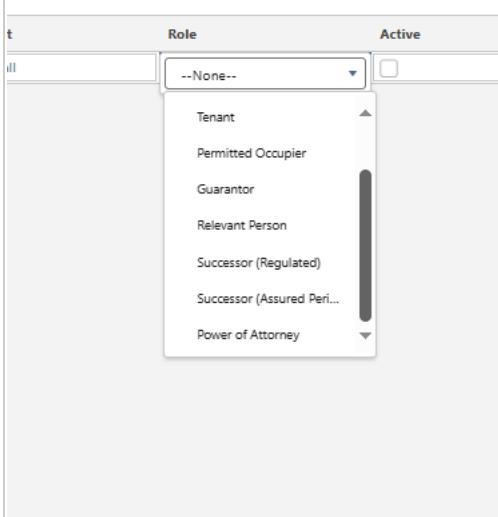
Comment by [Nikki](#) [10/Apr/25]

[Matthew Pitcairn](#) please remember to ask Shaun about deploying this to SIT sooner rather than later. Grainger need it for their GREP integration. Tx

Comment by [Matthew Pitcairn](#) [11/Apr/25]

Nikki Thanks for the reminder

Comment by Helen Douglas-Teggart [23/Apr/25]



Pass

--

[See a History of Price Book Rent & ERVs \(CJR-390\)](#)

↳ [CJR-378] Add ERV Fields back to Unit Created: 07/Apr/25 Updated: 22/Apr/25 Resolved: 17/Apr/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	See a History of Price Book Rent & ERVs

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, UAT, UAT_Feedback		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Issue links:	Relates			
	relates to	CJR-379	See Latest ERV Values & Dates on Unit	To Do
	relates to	CJR-60	Identify the relevant ERVs & Price Books	Done
Sub-tasks:	Key	Summary	Type	Status
	CJR-396	QA	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	0.25			
Sprint:	CJR Sprint 3			
Rank:	2 j012pb:000000zx0000b			

Description

Users need to be able to see the existing ERV fields on the unit until the ERV values are uploaded/imported.

Undo the below change from <https://graingerplc.atlassian.net/browse/CJR-60> :

A/C 2 - Hide Existing ERV fields on the Unit

WHEN a user is viewing a unit (any record type)

THEN the existing fields will no longer be visible: ERV Date, ERV, ERV MONTHLY, March 23 ERV

Unit
41 Adlay Apartments, E16 2YG

Building Adlay Apartments, 3 Millet Place, London E16	Block Adlay Apartments	Unit Status Future Vacant	Bedrooms 3 Bedrooms	Bathrooms 2	Priority Flag
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Unit Details Lettings And Marketing Property Management Tenants Contact Details Key Documents Related

Availability and Pricing

Available Date 09/08/2024	Marketing Rent £3,200.00
Future Vacant Date 03/08/2024	Passing Rent 3,135
Marketing Launch Date	ERV Date 30/09/2023
Lettings Priority No	ERV £37,856.00
Active Listings? No	ERV MONTHLY £3,154.67
Access Availability	March 23 ERV
Key location - Lettings Marketing	

Comments

Comment by Matthew Pitcairn [08/Apr/25]

Jacob Smycz looks like this was done manually in Dev, QA, SIT and UAT unless I am being slow, can you confirm?

Unit
0, Fernside Court, Holders Hill Road, Hendon,

Building Fernside Court, Holders Hill Road, Hendon, NW	Block Brent	Unit Status On the Market Available to View	Bedrooms Studio
---	----------------	--	--------------------

Unit Details Lettings and Marketing Property Management Tenants Contact Details More

Availability and Pricing

Available Date Available Date	Marketing Rent Marketing Rent
Future Vacant Date Future Vacant Date	Previous Rent (Monthly) Previous Rent (Monthly)
Marketing Launch Date Marketing Launch Date	Current Rent (Monthly) Current Rent (Monthly)
Lettings Priority Lettings Priority	
Active Listings? Active Listings?	
Access Availability Access Availability	
Key location - Lettings Marketing Key location - Lettings Marketing	

Unit Status

Comment by Elisabeta Mihalache [22/Apr/25]

ERV Fields visible on units

Availability and Pricing

Available Date	02/07/2024	
Future Vacant Date	14/05/2026	
Marketing Launch Date		
Lettings Priority		
Active Listings?	No	
Access Availability		
Key location - Lettings Marketing		

Marketing Rent	
Previous Rent (Monthly)	
Current Rent (Monthly)	
ERV Date	
30/09/2023	
ERV	
£24,000.00	
ERV MONTHLY	
£2,000.00	
March 23 ERV	
£23,928.01	

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

↳ [CJR-335] Only Show Vehicle Section for Parking Licences Created: 01/Apr/25 Updated: 22/Apr/25 Resolved: 03/Apr/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Sarah Jessiman
Resolution:	Done	Votes:	0
Labels:	IA_Done, OpenBox, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Sub-tasks:	Key	Summary	Type	Status
	CJR-361	QA	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	1			
Sprint:	CJR Sprint 3			
Rank:	2 j012pb:01uhzv			

Description

GIVEN a tenancy has record type 'Residential Tenancy' or Residential Contract'

WHEN a user views the tenancy details screen

THEN the "Vehicle Details (Parking License Only)" section will only display where **Document Type** includes 'Parking Licence' or 'Parking Licence Oxford'

Comments

Comment by [Matthew Pitcairn](#) [03/Apr/25]

Nikki Document Type is a multiselect picklist so it is possible to have multiple different values, I assume we want this story check if the necessary values are included \

Comment by [Nikki](#) [03/Apr/25]

Matthew Pitcairn , can we say where document type includes one of those?

Comment by [Matthew Pitcairn](#) [03/Apr/25]

Nikki yup, my logic atm is if document type includes either values — just wanted to confirm that made sense

Comment by Elisabeta Mihalache [22/Apr/25]

Tenancy **00070924**

Details

Tenancy Owner	Jessica Howe	Tenancy Type	New
Account Name	Phoebe Buffay	Agreement Type	Licence
Record Status	Activated	Document Type	Parking Licence
Contract Term (months)	12	Memorandum of Agreement Date	
Start Date	16/04/2025	Tenancy	00070925
End Date	15/04/2026	Opportunity	GREP-CoA Phoebe Buffay - C
Actual Move Out Date			

Additional Information

Unit	Car Space 1(D), New Islington, M4 6BY	Rent	45.00
Uplift %	6.00%	Security Deposit Amount	£0.00
Break Clause	No Break	Live Work Clause	
Tenant Break		Landlord Break	
Special Clauses		Special Clause Free Text	
Description			

Vehicle Details (Parking License Only)

Vehicle Make	
Vehicle Model	
Vehicle Registration	

System Information

Activated By	Jessica Howe	Record Number	00070924
Tenancy	Phoebe Buffay		
Account Name	Phoebe Buffay	Agreement type	Licence
Tenancy Length (Months)	12	Document Type	Parking Licence
Start Date	16/04/2025	Memorandum of Agreement Date	
Latest Contract Start Date	16/04/2025	Arrears	
Tenancy End Date	15/04/2026	GPLC Notice Initiated	
Actual Move Out Date			

Additional Information

Unit	Car Space 1(D), New Islington, M4 6BY	Current Rent	£0.00
Uplift %	6.00%	Security Deposit Amount	£0.00
Previous Rent		TDS Reference	
Break Clause	No Break	Live Work Clause	
Special Clauses		Special Clause Free Text	
Description			

Vehicle Details (Parking License Only)

Vehicle Make	
Vehicle Registration	

System Information

Record Type
Residential TenancyAgreement Type
AST

Unit

Apt 402, Abbeville Apts, 37 London Rd, Barkin

Start Date
15/04/2025Tenancy End Date
14/05/2026[Details](#) [Related](#) [Tenants](#)**Tenancy Overview**[\(D\) *Residential Tenancy Jelly Cat](#)

Current AST Apt 402, Abbeville Apts, 37 London Rd, Barkin

[▼ Details](#)

Tenancy Owner



Jessica Howe

Record Status

Current

Account Name

Jelly Cat

Agreement Type

AST

Tenancy Length (Months)

13

Document Type

AST

Start Date

15/04/2025

Memorandum of Agreement Date

Latest Contract Start Date

14/04/2025

Arrears

Tenancy End Date

14/05/2026

GPLC Notice Initiated

Actual Move Out Date

[▼ Additional Information](#)

Unit

Apt 402, Abbeville Apts, 37 London Rd, Barkin

Current Rent

£1,815.00

Uplift %

4.00%

Security Deposit Amount

£1,815.00

Previous Rent

No Break

TDS Reference

Special Clauses

Live Work Clause

Description

[▼ System Information](#)

 00062161

Record Type Residential Contract	Agreement Type AST	Opportunity GREP-CoA Jelly Cat - Apt 402, Abbeville Apts, 37 London Rd, Barkin	Unit Apt 402, Abbeville Apts, 37 London Rd, Barkin	Start Date 15/04/2025	End Date 14/05/2026
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Details Related

▼ Details

Tenancy Owner  Jessica Howe	Tenancy Type New
Account Name Jelly Cat	Agreement Type AST
Record Status Activated	Document Type AST
Contract Term (months) 13	Memorandum of Agreement Date
Start Date 15/04/2025	Tenancy 00062161
End Date 14/05/2026	Opportunity GREP-CoA Jelly Cat - Apt 402
Actual Move Out Date	

▼ Additional Information

Unit Apt 402, Abbeville Apts, 37 London Rd, Barkin	Rent 1,815.00
Uplift % 4.00%	Security Deposit Amount £1,815.00
Break Clause No Break	Live Work Clause
Tenant Break	Landlord Break
Special Clauses	Special Clause Free Text
Description	

▼ System Information

Activated By  Jessica Howe	Record Number 00062161
Record Type Residential Contract	Status Activated
Created By	Last Modified By

Vehicle Details only visible on Parking Licence

SVOT - Import Current & Passing Rent from Qube (CJR-345)
↳ [CJR-333] Rename Passing Rent Created: 31/Mar/25 Updated: 22/Apr/25 Resolved: 01/Apr/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Import Current & Passing Rent from Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, Show_Me_Complete, UAT, UAT_Feedback		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:	 image-20250331-085936.png	 image-20250331-090031.png	 image-20250422-083320.png	 image-20250422-083320.png
Sub-tasks:	Key	Summary	Type	Status
	CJR-337	QA	Subtask	Done
Grainger Testing:	Pass			

Story point estimate:	0.5
Sprint:	CJR Sprint 3
Rank:	2 j012pb:01

Description

On the Residential Tenancy screen:

- Rename the "Passing Rent" field to "Previous Rent".

The screenshot shows a table with columns: Record Type (Residential Tenancy), Agreement Type, Unit (Apt 101, Abbeville Apts, 37 London Rd, Barkin), Start Date, and Tenancy End Date. Below the table are tabs for Details and Related, and a section titled 'Tenancy Overview' with a note about the record type and unit information.

Record Type Residential Tenancy	Agreement Type	Unit Apt 101, Abbeville Apts, 37 London Rd, Barkin	Start Date	Tenancy End Date
------------------------------------	----------------	---	------------	------------------

Details Related

Tenancy Overview

**Residential Tenancy js tpt test 1
Current Apt 101, Abbeville Apts, 37 London Rd, Barkin

> Details

▼ Additional Information

Unit <i>i</i>	Apt 101, Abbeville Apts, 37 London Rd, Barkin	
Uplift %		
Passing Rent <i>i</i>		

On the Unit screen:

- Rename the "Passing Rent (Monthly)" field to "Previous Rent (Monthly)".

The screenshot shows a table with columns: Building (Abbeville Apartments, 37 London Road, Barking), Block (Abbeville - Apartments), Unit Status (Reserved), Bedrooms (2 Bedrooms), Bathrooms (1), and Priority Flag. Below the table are tabs for Unit Details, Lettings And Marketing (which is selected), Property Management, Tenants Contact Details, Key Documents, and Related. A section titled 'Availability and Pricing' is expanded, showing fields for Available Date (05/11/2023), Future Vacant Date, Marketing Rent, and Passing Rent (Monthly) (1,495).

Building Abbeville Apartments, 37 London Road, Barking	Block Abbeville - Apartments	Unit Status Reserved	Bedrooms 2 Bedrooms	Bathrooms 1	Priority Flag
---	---------------------------------	-------------------------	------------------------	----------------	---------------

Unit Details **Lettings And Marketing** Property Management Tenants Contact Details Key Documents Related

▼ Availability and Pricing

Available Date	05/11/2023		Marketing Rent
Future Vacant Date			Passing Rent (Monthly) <i>i</i>
			1,495

Comments

Comment by [Elisabeta Mihalache](#) [22/Apr/25]

 **Tenancy**
Justin Bieber

Justin Bieber		Decant Agreement
Tenancy Length (Months)		Document Type
2		Decant Agreement
Start Date		Memorandum of Agree
11/04/2025		
Latest Contract Start Date		Arrears
11/04/2025		
Tenancy End Date		GPLC Notice Initiated
10/06/2025		
Actual Move Out Date		
17/04/2025		

▼ Additional Information

Unit		Current Rent	
Apt 113, Abbeville Apts, 37 London Rd, Barkin			
Uplift %		Security Deposit Amou	
4.00%		£0.00	
Previous Rent		TDS Reference	
Break Clause		Live Work Clause	
No Break			
Special Clauses		Special Clause Free Tex	
Description			

 **Unit**
Apt 113, Abbeville Apts, 37 London Rd, Barkin

Building	Block	Unit Status	Bedrooms	Bathrooms	Pri
Abbeville Apartments, 37 London Road, Bar	Abbeville - Apartments	On the Market Available to View	1 Bedroom	1	

Unit Details	Lettings And Marketing	Property Management	Tenants Contact Details	Key Documents	Related
▼ Availability and Pricing					
Available Date			Marketing Rent		
18/04/2025			£1,510.00		
Future Vacant Date			Previous Rent (Monthly)		
17/04/2025			1,390		
Marketing Launch Date			Current Rent (Monthly)		
Lettings Priority			ERV Date		
			30/09/2023		
Active Listings?			ERV		
No			£17,796.00		
Access Availability			ERV MONTHLY		
Thursday 11 May 12 - 5pm			£1,483.00		
Key location - Lettings Marketing			March 23 ERV		
			£16,896.00		
field name updated to Previous Rent					

[\[CJR-332\] Rename Tenancy Term](#) Created: 31/Mar/25 Updated: 22/Apr/25 Resolved: 01/Apr/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Sarah Jessiman
Resolution:	Done	Votes:	0
Labels:	OpenBox, Show_Me_Complete, UAT, UAT_Feedback		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Sub-tasks:	Key	Summary	Type	Status
	CJR-338	QA	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	0.5			
Sprint:	CJR Sprint 3			
Rank:	2 j012pb:01uhx			

Description

Rename "Tenancy Term (Months)" field to "Tenancy Length (Months)".

Tenancy js.tpt.test.1

Record Type	Residential Tenancy	Agreement Type	Unit	Start Date	Tenancy End Date						
Apt 101, Abbeville Apts, 37 London Rd, Barkin											
Tenancy Overview **Residential Tenancy js.tpt.test.1 Current Apt 101, Abbeville Apts, 37 London Rd, Barkin											
Details <ul style="list-style-type: none"> Details <table border="1"> <tr> <td>Tenancy Owner</td> <td>GREP Integration User</td> </tr> <tr> <td>Account Name</td> <td>js.tpt.test.1</td> </tr> <tr> <td>Tenancy Term (Months)</td> <td>1</td> </tr> </table>						Tenancy Owner	GREP Integration User	Account Name	js.tpt.test.1	Tenancy Term (Months)	1
Tenancy Owner	GREP Integration User										
Account Name	js.tpt.test.1										
Tenancy Term (Months)	1										

Comments

Comment by [Elisabeta Mihalache](#) [22/Apr/25]

Tenancy **Justin Bieber**

▼ Details

Tenancy Owner	Jessica Howe	R
Account Name	Justin Bieber	C
Tenancy Length (Months)	2	A
Start Date	11/04/2025	D
Latest Contract Start Date	11/04/2025	D
Tenancy End Date	10/06/2025	M
Actual Move Out Date	17/04/2025	Ai
		G

Field name updated

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

↳ [CJR-331] Display Current & Previous Tenants Separately Created: 31/Mar/25 Updated: 22/Apr/25 Resolved: 01/Apr/25

Status:	Done				
Project:	Customer Journey - Renewals Project				
Components:	None				
Affects versions:	None				
Fix versions:	Sprint 2				
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube				
Type:	Story	Priority:	Priority 3		
Reporter:	Nikki	Assignee:	Nadia Swarts		
Resolution:	Done	Votes:	0		
Labels:	OpenBox, Show_Me_Complete, UAT, UAT_Feedback				
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified		
Σ Time Spent:	Not Specified	Time Spent:	Not Specified		
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified		
Attachments:					
Sub-tasks:	Key	Summary	Type	Status	Assignee
	CJR-340	QA2	Subtask	Done	
Grainger Testing:	Pass				
Story point estimate:	0.5				
Sprint:	CJR Sprint 3				
Rank:	2 012pb:000000z00d				

Description

When viewing record type 'residential tenancy':

- Remove the 'Tenancy Contact Roles' related list from the 'Related' tab
- Add a new tab "Tenants" after 'Details' with 2 related lists:
 - Current Tenancy Contact Roles** - displays the same records and columns as the 'tenancy contact roles' related list, except only show records where **End Date is null**.
 - Previous Tenancy Contract Roles** - displays the same records and columns as the 'tenancy contact roles' related list, except only show records where **End Date is not null**.

Tenancy
Nikki Stephen

Record Type Residential Tenancy	Agreement Type AST	Unit Flat 6, Corbar Hill House, Buxton, SK17	Start Date 01/04/2025	Tenancy 31/03/
------------------------------------	-----------------------	---	--------------------------	-------------------

Details **Related**

Tenancy Contact Roles (2)
2 items • Updated a few seconds ago

<input type="checkbox"/> Contact ID	Role
1 <input type="checkbox"/> Nikki Stephen	Lead Tenant
2 <input type="checkbox"/> John Huthwaite	Tenant

CommentsComment by [Matthew Pitcairn](#) [01/Apr/25]

Nikki UX question — if End Date is always Null for the new Current list, do we need to show that column? Or are we making it explicit for the user?

Comment by [Nikki](#) [01/Apr/25]Hi [Matthew Pitcairn](#), I think let's leave it in just to be explicit. TxComment by [Nadia Swarts](#) [01/Apr/25]

Matthew Pitcairn Happy with this in QA 😊

Comment by [Elisabeta Mihalache](#) [22/Apr/25]

displaying as expected

Tenancy
Yusuf Akhalwaya

Record Type Residential Tenancy	Agreement Type AST	Unit 418, Solstice Apts, Silbury Boulevard	Start Date 24/02/2023	Tenancy End Date 23/02/2025
------------------------------------	-----------------------	---	--------------------------	--------------------------------

Details **Related** **Tenants**

Current Tenancy Contact Roles (1)
1 item • Filtered by End Date • Updated a few seconds ago

<input type="checkbox"/> Contact ID	Role
1 <input type="checkbox"/> Yusuf Akhalwaya	Lead Tenant

[View All](#)

Previous Tenancy Contact Roles (1)
1 item • Filtered by End Date • Updated a few seconds ago

<input type="checkbox"/> Contact ID	Role	Start Date
1 <input type="checkbox"/> Faatimah Patel	Tenant	24/02/2023

[View All](#)

[\[CJR-320\] Residential Tenancy > Contract Related List - add columns](#) Created: 28/Mar/25 Updated: 10/Apr/25 Resolved: 28/Mar/25

Status:	Done		
Project:	Customer Journey - Renewals Project		
Components:	None		
Affects versions:	None		
Fix versions:	Sprint 2		
Parent:	SVOT - Provide Single View of Tenancy		

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Sub-tasks:	Key	Summary	Type	Status
	CJR-324	QA2	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	0.5			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:0000001mi			

Description

Residential Tenancy > Contract Related List:

- Please add *Rent* and *Uplift %* columns at the end

[Tenancy](#) [Nikki Stephen](#)

Contracts (5)						
5 items • Sorted by Start Date • Updated 4 minutes ago						
Record Number	Tenancy Type	Start Date ↑	End Date	Record Status	Opportunity	
1 00038695	New	01/04/2025	31/03/2027	Ended	Nikki Stephen New Lease	
2 00038693	New	01/04/2025	31/03/2027	Draft	Nikki Stephen New Lease	
3 00038716	New	02/04/2025	01/04/2027	Current	New Decant - Nikki Stephan - 33 Agate Mews	
4 00038700	New	01/05/2025	30/04/2026	Current	New - Nikki Stephen - Parking 37	
5 00038703	Renewal	01/04/2027	31/03/2029	Activated	Renewal - Nikki Stephen - 1/4/2027	

[View All](#)

Comments

Comment by [Anjali Salecha](#) [28/Mar/25]

Mudzunga Khonani Davhana , this has been deployed to QA.

Comment by [Elisabeta Mihalache](#) [10/Apr/25]

Rent and Uplift columns visible as expected

 **Tenancy**
Gavin McLoughlin

Record Type Residential Tenancy	Agreement Type AST	Unit 328, Solstice Apts, Silbury Boulevard	Start Date 03/06/2021	Tenancy End Date 02/06/2025
------------------------------------	-----------------------	---	--------------------------	--------------------------------

[Details](#) **Related** [Tenants](#)
 **Contracts (4)**

4 items • Updated 18 minutes ago

Record Number	Tenancy Type	Start Date	End Date	Record Sta...	Opportunity
1 00012575	New	03/06/2021	02/06/2022	Draft	Gavin McLoughlin - 328 Solstice Apartment
2 00015041	Renewal	03/06/2022	02/06/2023	Draft	RENEWAL - 328 Solstice Apartments - 03.06
3 00025273	Renewal	03/06/2023	02/06/2024	Draft	RENEWAL - 328, Solstice - 03/06/2023
4 00036806	Renewal	03/06/2024	02/06/2025	Draft	Renewal - 328, Solstice 03/06/2024

[View All](#)
 **End Of Tenancies (0)**
SVOT - Provide Single View of Tenancy (CJR-392)
[↳ \[CJR-319\] User access - Residential Tenancy > Tenancy field](#) Created: 28/Mar/25 Updated: 15/Apr/25 Resolved: 28/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Provide Single View of Tenancy

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Issue links:	Relates			
	relates to	CJR-443	Not required	
Done				
Sub-tasks:	Key	Summary	Type	Status
	CJR-325	QA2	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	0.5			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:000000em			

Description

Users should have access to edit the **Tenancy field** on the Residential Tenancy record in order to clean up migrated data & reassign parkings if there is an internal move, etc.

graingerplc--sit.sandbox.lightning.force.com/lightning/r/Contract/800Pv00000fdnRIIAJ/view

Projectworks Maps Gmail Templates Grainger SC Miro Keeper Grainger PLC Note... BA Time&Date SC - MRI Impl SC - Requirements SC - OneDrive SC - Smi

Logged in as Helen Douglas-Teggart (hteggart@graingerplc.co.uk) | Sandbox SIT | Log out as Helen Douglas-Teggart

Search...

Grainger PLC Home Leads Accounts Contacts Opportunities Tenancies Blocks Buildings Units Tasks Reports Dashboards Calendar

Tenancy Nikki Stephen

Record Type Residential Tenancy Agreement Type Licence Unit Heysmoor Heights, Parking 37, Liverpool, L8 Start Date 01/05/2025 Tenancy End Date 30/04/2026

Details Related

Tenancy Overview

- > Residential Tenancy Nikki Stephen
Current AST Flat 6, Corbar Hill House, Buxton, SK17
- > Details
- > Additional Information
- > Vehicle Details (Parking License Only)

System Information

PMS Reference	QUBEParking37	Record Number	00038700
Record Type	Residential Tenancy	Status	Activated
Tenancy	00038696	Created By	Open box, 27/03/2025, 11:56
Last Modified By	Open box, 27/03/2025, 15:18		

Comments

Comment by Jacob Smycz [28/Mar/25]

Nikki should this be all users or just some subset, like renewals and TPT?

Comment by Nikki [28/Mar/25]

Jacob Smycz I leave it to your discretion, your suggestion sounds good to me.

Comment by Jacob Smycz [28/Mar/25]

Have updated PS_Renewals CRUD and PS_Tenancy_Progression CRUD to allow the field Tenancy__c to be editable

Comment by Helen Douglas-Teggart [14/Apr/25]

Pass but search function would be more useful if it searched for linked addresses/opportunities rather than tenancy numbers?

Comment by Helen Douglas-Teggart [15/Apr/25]

Pass- function works but is limited

Unit	1403, Lamp House, 215 Chapel St, Salford, M3		Current Rent	
Uplift %	4.00%		Security Deposit Amount	£1,250.00
Previous Rent			TDS Reference	
Break Clause	No Break		Live Work Clause	
Special Clauses			Special Clause Free Text	
Description	AST			

System Information

PMS Reference	222649060002	Record Number	00042934
Record Type	Residential Tenancy	Status	Activated
Tenancy		Created By	Open box, 07/04/2025, 14:21
Last Modified By	Open box, 11/04/2025, 15:37		

SVOT - Import Current & Passing Rent from Qube (CJR-345)↳ [CJR-318] **Tenancy Passing Rent - Update help text** Created: 28/Mar/25 Updated: 10/Apr/25 Resolved: 28/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Import Current & Passing Rent from Qube
Type:	Story
Priority:	Priority 3

Reporter:	Nikki	Assignee:	Sarah Jessiman
Resolution:	Done	Votes:	0
Labels:	OpenBox, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Sub-tasks:	Key	Summary	Type	Status
	CJR-323	QA	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	0.5			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:000000zx			

Description

Please update the help text to:

"Previous rent for the unit, while the tenancy was active."

Additional Information

Unit	Flat 6, Cobham Hill House, Buxton
Uplift %	Previous rent, while the contract was active.
Passing Rent	

"Current rent, while the tenancy was active"

Current rent, while the contract was active.

Current Rent

Comments

Comment by [Anjali Salecha](#) [28/Mar/25]

Hi [Mudzunga Khonani Davhana](#) , this has been deployed to QA environment.

Comment by [Sarah Jessiman](#) [28/Mar/25]

Hi [Anjali Salecha](#) QA is complete - this can be deployed to SIT

Comment by [Elisabeta Mihalache](#) [10/Apr/25]

Help Text displaying correctly

Current rent, while the tenancy was active.

Current Rent i

Security Deposit Amount

TDS Reference

Live Work Clause

Special Clause Free Text

Record Number

00054837

Static



Tenancy

Gavin McLoughlin

▼ Additional Information

Unit i

Parking U29, Solstice Apts, Silbury Blvd

Uplift %

Previous monthly rent, while the contract was active.

Previous Rent i

Break Clause

Check Contract

Special Clauses

Description

Licence

SVOT - Provide Single View of Tenancy (CJR-392)

↳ [CJR-316] **Tenancy Hierarchy - Remove orange highlight** Created: 28/Mar/25 Updated: 10/Apr/25 Resolved: 28/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Provide Single View of Tenancy

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Sarah Jessiman
Resolution:	Done	Votes:	0
Labels:	OpenBox, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified

Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified
Attachments:			
Issue links:	Relates relates to CJR-145	View Tenancy Hierarchy	Done
Sub-tasks:	Key CJR-329	Summary QA	Type Subtask
Grainger Testing:	Pass	Status Done	Assignee
Story point estimate:	1		
Sprint:	CJR Sprint 2		
Rank:	2 j012pb:000000zl		

Description

Tenancy Overview

- ✓ Residential Tenancy-show me 46
Decant Agreement Wales-58a, Redbrick Crescent, Barry I...
- ✓ Residential Tenancy-show me 46
Licence-Car Park Bay 25, Fielding House, Carey Lane,-...
- Add two ** for current record (if decant make it bold)
 - ✓ Residential Tenancy-show me 46
AST-Car Space 108, The Rock, Bury, BL9-Current
 - ✓ Residential Tenancy-show me 46 [This is current record]
Licence-Flat 24, Cooke Place, Block E, Salford, M...
- Put Record Status here

Order so that "child tenancy" comes after child contracts

Fix truncation

Remove time component

Residential Contract-00044418
New-2025-03-21 00:00:00

Residential Contract-00044415
New-2025-03-01 00:00:00

Residential Contract-00044413
New-2025-03-24 00:00:00

Residential Contract-000444283
New-2025-04-05 00:00:00

Residential Contract-00044443
New-2025-04-01 00:00:00

Residential Contract-00044448

Investigate if we can link as below

Details**Related****Tenancy Overview**

- ✓ Residential Tenancy-show me 46 [This is current record]
Decant Agreement Wales-58a, Redbrick Crescent, Barry I...
- ✓ Residential Tenancy-show me 46 [\[open in new tab\]](#)
Licence-Car Park Bay 25, Fielding House, Carey Lane,-...
- ✓ Residential Tenancy-show me 46 [\[open in new tab\]](#)
AST-Car Space 108, The Rock, Bury, BL9-Current
- Residential Tenancy-show me 46
Licence-Flat 24, Cooke Place, Block E, Salford, M...
- Residential Contract-00044450
Mid Term Change Of Sharer-2027-03-01 00:00:00
- Residential Contract-00044415
New-2025-03-01 00:00:00
- Residential Contract-00044413
New-2025-03-24 00:00:00
- Residential Contract-000444283
New-2025-04-05 00:00:00
- Residential Contract-00044443
New-2025-04-01 00:00:00
- Residential Contract-00044448

Grainger PLC Home Leads Accounts Contacts Opportunities Tenancies Blocks

Tenancy show me 46

Record Type Residential Tenancy	Agreement Type Decant Agreement Normal	Unit 8, Cooke Place, Block E, Salford, M5	Start Date 03/04/2025
------------------------------------	---	--	--------------------------

Details Related

Tenancy Overview

- ▼ Residential Tenancy-show me 46
 - Decant Agreement Wales-58a, Redbrick Crescent, Barry Island
- ▼ Residential Tenancy-show me 46
 - Licence-Car Park Bay 25, Fielding House, Carey Lane,-...
- ▼ Residential Tenancy-show me 46
 - AST-Car Space 108, The Rock, Bury, BL9-Current
- ▼ Residential Tenancy-show me 46
 - Leicester Place 24, Bowdon Place, Bowdon, Cheshire, M...
- ▼ Residential Tenancy-show me 46 [This is current]
 - Decant Agreement Normal-8, Cooke Place, Block E, Salford, M...

Remove highlight on click
If not possible, can we remove the orange strip at left?

Residential Contract-000444410
New-2025-03-20 00:00:00

Residential Contract-000444450
Mid Term Change Of Sharer-2027-03-01 00:00:00

Residential Contract-000444415
New-2025-03-01 00:00:00

Residential Contract-000444413
New-2025-03-24 00:00:00

Residential Contract-000444283
New-2025-04-05 00:00:00

Comments

Comment by Anjali Salecha [28/Mar/25]

Hi Mudzunga Khonani Davhana , following 2 fixes have been deployed to QA environment:

1. Remove orange highlight
2. Fix truncation

Nikki and Sam Duncan , it seems that "[Open in new tab]" is not a simple fix. It needs research and more efforts.

Comment by Nikki [28/Mar/25]

Anjali Salecha , I can't remember what the 'open in a new tab' request was. I think it great as is. I think we can close this if Mudzunga Khonani Davhana is happy with the changes. cc Sam Duncan

Comment by Sarah Jessiman [28/Mar/25]

Hi Anjali Salecha QA complete. Please deploy to SIT, thanks

Comment by Elisabeta Mihalache [10/Apr/25]

Orange highlight not visible

Details Related Tenants**Tenancy Overview**

**Residential Tenancy errorr test jacob

Activated AST (Affordable) 44, Kettlebaston Road, Leyton, London

Residential Contract 00038894

New 24/03/2025

▼ Details

Tenancy Owner



Open box

Account Name

errorr test jacob

SVOT - Provide Single View of Tenancy (CJR-392)

↳ [CJR-314] Update Account > Tenancy Related List Created: 28/Mar/25 Updated: 10/Apr/25 Resolved: 28/Mar/25

Status: Done

Project:	Customer Journey - Renewals Project		
Components:	None		
Affects versions:	None		
Fix versions:	Sprint 2		
Parent:	SVOT - Provide Single View of Tenancy		

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:					
Issue links:	Relates				
	relates to	CJR-143 Update Contract / Tenancy Related Lists			
		Done			
Sub-tasks:	Key	Summary	Type	Status	Assignee
	CJR-322	QA	Subtask	Done	
Grainger Testing:	Pass				
Story point estimate:	0.5				
Sprint:	CJR Sprint 2				
Rank:	2 j012pb:0000006i2				

Description

Person Account
Nikki Stephen

Tenancies (4)

4 items • Sorted by Record Number • Filtered by Record Type • Updated a minute ago

	Record ...	Record Type	Tenancy Ty...	Agreement...	Unit	Tenancy St...	Tenancy En...	Status	
1	<input type="checkbox"/> 00038726	Residential Tenancy	New	AST	Flat 30, Juniper House, Salford, MS	07/04/2025	06/10/2025	Draft	<input type="button" value="View All"/>
2	<input type="checkbox"/> 00038716	Residential Tenancy	New	Decant Agreem...	Flat 33, Agate Mews, Block D, Salf...	02/04/2025	01/04/2027	Activated	<input type="button" value="View All"/>
3	<input type="checkbox"/> 00038700	Residential Tenancy	New	Licence	Heysmoor Heights, Parking 37, Lv...	01/05/2025	30/04/2026	Activated	<input type="button" value="View All"/>
4	<input type="checkbox"/> 00038695	Residential Tenancy	New	AST	Flat 6, Corbar Hill House, Buxton, ...	01/04/2025	31/03/2029	Activated	<input type="button" value="View All"/>

Please update the **tenancies related list** that displays on the 'Person Account' or 'B2B Company account':

- Remove the *Tenancy Type* column
- Replace the 'Status' column with 'Record Status'

Comments

Comment by [Anjali Salecha](#) [28/Mar/25]

Mudzunga Khonani Davhana , this has been deployed to QA environment.

Comment by [Mudzunga Khonani Davhana](#) [28/Mar/25]

Hi [Anjali Salecha](#) , you can deploy this to SIT

Comment by [Elisabeta Mihalache](#) [10/Apr/25]

columns updated

Tenancies (1)
1 item • Sorted by Record Number • Filtered by Record Type • Updated a few seconds ago
<input type="checkbox"/> Record N... ▾ <input type="checkbox"/> Record Type ▾ <input type="checkbox"/> Agreement... ▾ <input type="checkbox"/> Unit ▾ <input type="checkbox"/> Tenancy Start ... ▾ <input type="checkbox"/> Tenancy En... ▾ <input type="checkbox"/> Re
1 <input type="checkbox"/> 00038895 Residential Tenancy AST (Affordable) 44, Kettlebaston Road, Leyton, London 24/03/2025 <input type="button" value="View All"/>

[SVOT - Create Tenancies in Salesforce that Map to Qube](#) (CJR-389)

[\[CJR-294\] Update Tenancy End Date field](#) Created: 25/Mar/25 Updated: 14/Apr/25 Resolved: 26/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, UAT, UAT_Feedback		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Sub-tasks:	Key	Summary	Type	Status
	CJR-297	QA2	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	0.5			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:000000d04i			

Description

Tenancy End Date is no longer being updated by Qube:

1. Remove the existing help text.
2. Field should be editable.

Comments

Comment by Matthew Pitcairn [26/Mar/25]

Jacob Smycz , does it make sense to give edit permission to the Contract PS and remove all access from the GREP PS?

	PS_Commercial_Leettings_CRUD	Provides CRUD access to objects used by Commercial Leettings users https://graingerplc.atlassian.net/browse/CJR-159
	PS_GEN_Contracts_Read	Read access to Contracts/Tenancies, Contract/Tenancy Contact Roles, and Agreements https://graingerplc.atlassian.net/browse/CJR-45
	PS_GREP_Integration_CRUD	https://graingerplc.atlassian.net/browse/CJR-159

Comment by Jacob Smycz [26/Mar/25]

Matthew Pitcairn yes to removing from the GREP permset, No to adding to the Contract PS

Nikki who within grainger is expected to update this? ie will it be manually or via the most recent contract?

Comment by Nikki [26/Mar/25]

Jacob Smycz , it will be set by the most recent contract, but I think users will need the ability to edit it to fix up the data migration.

Comment by Jacob Smycz [26/Mar/25]

Matthew Pitcairn in that case, please add edit FLS for that field to these two PermSets:

PS_Renewals_CRUD & PS_Tenancy_Progression_CRUD

Comment by Matthew Pitcairn [26/Mar/25]

Add IAs to the story based on what Jacob shared below

Comment by Helen Douglas-Teggart [10/Apr/25]

Box is editable but no permissions to save this.

The screenshot shows a Salesforce page for a tenancy record. At the top, there's a navigation bar with links like Home, Leads, Accounts, Contacts, Tenancies, Opportunities, Blocks, Buildings, Units, Tasks, Reports, and Dashboards. The current page is under the 'Tenancies' tab. The main header information includes:

- Tenancy**: Leah Ogilvie
- Record Type**: Residential Tenancy
- Agreement Type**: AST
- Unit**: Flat 33 Grove House, 11-20 Tudor Grove, Londo
- Start Date**: 04/11/2021
- Tenancy End Date**: 03/11/2024

Below the header, there are three tabs: **Details** (selected), **Related**, and **Tenants**.

Tenancy Overview section:

- **Residential Tenancy Leah Ogilvie
- Current AST Flat 33 Grove House, 11-20 Tudor Grove, Londo

Details section (expanded):

- Tenancy Owner**: Jemma Herring
- *Account Name**: Leah Ogilvie
- Tenancy Length (Months)**: 42 (Note: This field is calculated upon save)
- Start Date**: 04/11/2021
- Latest Contract Start Date**: 26/09/2025
- Tenancy End Date**: 26/09/2025
- Actual Move Out Date**: (empty)
- Record Status**: (empty)
- Agreement Type**: (empty)
- Document Type**: (empty)
- Memorandum of Agreement Date**: (empty)
- Arrears**: (empty)
- GPLC Notice Initiated**: (empty)

Additional Information section (expanded):

- Unit**: Flat 33 Grove House, 11-20 Tudor Grove, Londo
- Uplift %**: 6.00%
- Previous Rent**: (empty)
- Review the errors on this page.** (A red box with an exclamation mark contains this message and a link to review errors.)
- Deposit Amount**: (empty)
- Work Cause**: (empty)
- Cancel** and **Save** buttons

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

↳ [CJR-269] Update Tenancy Term Formula Created: 20/Mar/25 Updated: 10/Apr/25 Resolved: 25/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:	
Issue links:	Relates

	relates to	CJR-302	Tenancy Term calc	Done
	relates to	CJR-129	Users can see Qube Tenancy Details	Done
Sub-tasks:	Key	Summary	Type	Status
	CJR-285	QA	Subtask	Done
	CJR-288	QA2	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	1			
Sprint:	CJR Sprint 2			
Rank:	2 j01fnz:			

Description

The **Tenancy Term (Months)** formula does not cater for ended tenancies.

I may have specified 'End Date' instead of 'Tenancy End Date' originally.

A/C 1 - Update Tenancy Term (Months) formula

Field	Data Type	Help Text
Tenancy Term (Months)	Where Tenancy_Status_c is one of Draft, Future or Current = The number of months from [Start Date] to the later of [<u>Tenancy End Date</u> _ or Today] Where Tenancy_Status_c = Previous If <u>Actual Move Out Date</u> is populated = The number of months from [Start Date] to [Actual Move Out Date]; If <u>Actual Move Out Date</u> is null = The number of months from [Start Date] to [Tenancy End Date]	Months from tenancy start until the later of tenancy end date or the current date. Previous tenancies: Months from tenancy start until move out (if known), otherwise tenancy end date.

Comments

Comment by [Elisabeta Mihalache](#) [10/Apr/25]

Contract Term (months) formula works as expected

Contract Term (months)	60
Start Date	21/05/2024
End Date	20/05/2029
Actual Move Out Date	

Memorandum of Agreement Date

Tenancy [i](#)

[00045790](#)

Opportunity

[DMR: Renewal 3, Great Plant House, Woods Sq, Wate](#)

[SVOT - Keep Tenancies Updated & Synced with Qube](#) (CJR-393)[\[CJR-254\] Remove Create End Of Tenancy Button On Residential Contract](#) Created: 19/Mar/25 Updated: 10/Apr/25 Resolved: 20/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Mudzunga Khonani Davhana	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Sub-tasks:	Key	Summary	Type	Status
	CJR-259	QA	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	0.25			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:00000m			

Description

Remove Create End Of Tenancy Button On Residential Contract. Button is already in Residential Tenancy as per <https://graingerplc.atlassian.net/browse/CJR-193>

The screenshot shows a Salesforce Lightning page for a tenancy record with ID 00044382. The page has a red box highlighting the 'Record Type' field, which is set to 'Residential Contract'. Other visible fields include 'Agreement Type' (Decant Agreement Normal), 'Opportunity' (CJR 193 resi nani), and 'Unit' (1604, Neon House, 207). The 'Details' tab is selected, showing sections for 'Tenancy Owner' (Nikki Parkinson), 'Record Status' (Draft), 'Contract Term (months)' (24), 'Start Date' (01/04/2025), and 'End Date' (21/03/2027). A 'Comments' section at the bottom contains a single comment from Elisabeta Mihalache dated 10/Apr/25, stating: 'create end of tenancy button only present in Tenancy object'.

 **Tenancy**
Peter Collis

Record Type Residential Tenancy	Agreement Type AST	Unit 3, Great Plant House, Woods Sq, Waterlooville	Start Date 21/05/2024	Tenancy End Date 20/05/2029
------------------------------------	-----------------------	---	--------------------------	--------------------------------

[Details](#) [Related](#) [Tenants](#)
Tenancy Overview

**Residential Tenancy Peter Collis
Current AST 3, Great Plant House, Woods Sq, Waterlooville

▼ Details

Tenancy Owner
 Sophie Farr

Record Status
Current

 **Tenancy**
00035718

Record Type Residential Contract	Agreement Type AST	Opportunity DMR: Renewal 3, Great Plant House, Woods Sq, Waterlooville - 21/05/2024	Unit 3, Great Plant House, Woods Sq
-------------------------------------	-----------------------	--	--

[Details](#) [Related](#)

▼ Details

Tenancy Owner
 Sophie Farr

Tenancy Type
Renewal
Agreement Type

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)[↳ \[CJR-237\] Update Tenancy End Date on Renewal/COS](#) Created: 17/Mar/25 Updated: 17/Apr/25 Resolved: 25/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:			
Issue links:	Cloners clones CJR-159	Contract/Tenancy Start Date, End Date...	Done
	Relates relates to CJR-284	COS: Contract with Tenancy Type "Mi..."	Done
	relates to CJR-306	{Not a bug}Tenancy End Date not Updat...	Done

	relates to	CJR-46	Create/Update Tenancies			Done
Sub-tasks:	Key	Summary	Type	Status	Assignee	
	CJR-278	QA	Subtask	Done	Mudzunga Khonani Davhana	
Grainger Testing:	Pass					
Story point estimate:	1					
Sprint:	CJR Sprint 2					
Rank:	2 j012pb:000000d9					

Description

Updates to <https://graingerplc.atlassian.net/browse/CJR-159>

A/C 4 - Set Tenancy End Date for New Tenancy

WHEN a new contract record is created with *Residential Tenancy* record type
 THEN the *Start Date* will be populated from the activated Residential Contract's *Start Date*
 AND the *Tenancy End Date* will be populated from the activated Residential Contract's *End Date*.

A/C 5 - Updating a Tenancy

WHEN a *Residential Tenancy* contract record is updated on the activation of a renewal contract
 THEN the *Start Date* will not be updated
 AND the *Tenancy End Date* will be updated with the activated contract's end date.

Field	Field Type	New Commercial Contract is Created [Existing]	New Residential Contract is Created [Existing]	New Residential Tenancy is Created	Residential Tenancy is Updated on Activation of Renewal Contract	Residential Tenancy is Updated by GREP
Start Date	Date	Opportunity Move-In Date	Opportunity Move-In Date	New Contract Start Date	No Change	No Change
Contract Term (Months)	Integer	Derived from Opportunity Agreed Terms; e.g."3 Years" = 36	Opportunity Agreed Terms	n/a	n/a	n/a
End Date	Date	Opportunity Tenancy End Date	= Start Date + Contract Term (Months)	n/a	n/a	n/a
Tenancy End Date	Date	n/a	n/a	Contract End Date	Contract End Date	Qube-Tenancy End Date
Contract Term (Years)	Formula	= Contract Term (Months) / 12	n/a	n/a	n/a	n/a
Tenancy Term (Months)	Formula	n/a	n/a	= Number of months from [Start Date] to later of [End Date or Today]	= Number of months from [Start Date] to later of [End Date or Today]	= Number of months from [Start Date] to later of [End Date or Today]

Updates to <https://graingerplc.atlassian.net/browse/CJR-46> A/C 4 - Update Tenancy when a Mid-Term Contract is Activated

GIVEN a contract record has a *Record Type* of 'Residential Contract' AND the *Tenancy Type* is not 'New'
 WHEN the *Tenancy Status* changes to 'Activated'
 THEN the below fields (only) on the linked *Tenancy* record will be updated:

Field	Updated Value	Comments
Account Name	As per newly activated residential contract	
Unit	As per newly activated residential contract	
Agreement Type	As per newly activated residential contract	
Document Type	As per newly activated residential contract	
Tenancy End Date	As per newly activated residential contract	
Break Clause	If Break Clause on the residential contract is 'Check Contract': Do not update Otherwise: As per newly activated residential contract	
Special Clauses	If Break Clause on the residential contract is 'Check Contract' AND no Special Clauses are selected on the residential contract: Do not update Otherwise: As per newly activated residential contract	
Special Clause Free Text	If Break Clause on the residential contract is 'Check Contract' AND Special Clause Free Text on the residential contract is null: Do not update Otherwise: As per newly activated residential contract	
Uplift %	As per newly activated residential contract	
Description	As per newly activated residential contract	Is not currently populated on any tenancy.
Vehicle Make	If Vehicle Make on the residential contract is null: Do not update Otherwise: As per newly activated residential contract	
Vehicle Model	If Vehicle Model on the residential contract is null: Do not update Otherwise: As per newly activated residential contract	

Vehicle Registration	If Vehicle Registration on the residential contract is null: Do not update Otherwise: As per newly activated residential contract
----------------------	---

Comments

Comment by [Elisabeta Mihalache](#) [17/Apr/25]

[SVOT - Create Tenancies in Salesforce that Map to Qube \(CJR-389\)](#)↳ [CJR-236] [Tenancy Page Layout](#) Created: 17/Mar/25 Updated: 10/Apr/25 Resolved: 24/Mar/25

Status:	Done		
Project:	Customer Journey - Renewals Project		
Components:	None		
Affects versions:	None		
Fix versions:	Sprint 2		
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube		

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0

Labels:	OpenBox, REFINED, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:			
Issue links:	Blocks is blocked by CJR-281 Move "Latest Contract Start Date" Done Cloners clones CJR-152 Contract & Tenancy Page Layout Done Relates relates to CJR-55 Create/Update Tenancy from Qube [Grai... Done		
Sub-tasks:	Key	Summary	Type
	CJR-275	QA2	Subtask
Story point estimate:	0.5		
Sprint:	CJR Sprint 2		
Rank:	2 j01e0t:l		

Description

A/C 1 - Update Contract Page Layout for 'Residential Tenancy' Record Type

1. Hide the following fields:
 1. Latest Contract Term (Months)
 2. First Break Clause Date
 3. Break Clause Notice (Months)
2. Update the page layout for the first 2 sections:

Residential Tenancy	
Details	
Tenancy Owner	Record Status
Account Name	Agreement Type
Tenancy Term (Months)	Document Type
Start Date	Memorandum of Agreement Date
Latest Contract Start Date	Arrears
Tenancy End Date	GPLC Notice Initiated
Actual Move Out Date	
Additional Information	
Unit	Current Rent
Uplift %	Security Deposit Amount
Passing Rent	TDS Reference
Break Clause	Live Work Clause
Special Clauses	Special Clause Free Text
Description	

Comments

Comment by [Elisabeta Mihalache](#) [10/Apr/25]

Fields displaying correctly

Tenancy Overview

**Residential Tenancy Peter Collis
Current AST 3, Great Plant House, Woods Sq, Waterlooville

Details

Tenancy Owner	 Sophie Farr	Record Status	Current
Account Name	Peter Collis	Agreement Type	AST
Tenancy Length (Months)	60	Document Type	AST
Start Date	21/05/2024	Memorandum of Agreement Date	
Latest Contract Start Date		Arrears	
Tenancy End Date	20/05/2029	GPLC Notice Initiated	<input type="checkbox"/>
Actual Move Out Date			

Additional Information

Unit	3, Great Plant House, Woods Sq, Waterlooville	Current Rent	 £0.00
Upfront %	400%	Security Deposit Amount	£0.00
Previous Rent		TDS Reference	
Break Clause	2 at 4 to expire at 6	Live Work Clause	
Special Clauses		Special Clause Free Text	
Description	Gr Lets		

System Information

PLMS Reference	120245003001	Record Number	00045790
Record Type	Residential Tenancy	Status	Activated
Tenancy		Created By	 Open box - 07/04/2025, 14:23
Last Modified By	 Open box		

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

 [CJR-222] Create a Mid Term COS from a Tenancy Created: 13/Mar/25 Updated: 14/Apr/25 Resolved: 24/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Jacob Smycz	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:			
Labels:	Dev_Reviewed, OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:	 image-20250313-110513.png  image-20250414-141953.png  image-20250414-141739.png  image-20250414-141819.png  image-20250414-141933.png  image-20250414-141919.png										
Issue links:	Relates relates to CJR-277 Residential Contract: Remove "MTC (Mi... Done relates to CJR-308 MTC COS Opportunity - No offer, offer... Done										
Sub-tasks:	<table border="1"><thead><tr><th>Key</th><th>Summary</th><th>Type</th><th>Status</th><th>Assignee</th></tr></thead><tbody><tr><td>CJR-280</td><td>QA</td><td>Subtask</td><td>Done</td><td>Mudzunga Khonani Davhana</td></tr></tbody></table>	Key	Summary	Type	Status	Assignee	CJR-280	QA	Subtask	Done	Mudzunga Khonani Davhana
Key	Summary	Type	Status	Assignee							
CJR-280	QA	Subtask	Done	Mudzunga Khonani Davhana							
Grainger Testing:	Pass										
Story point estimate:	1										
Sprint:	CJR Sprint 2										
Rank:	2 j012pb:000000h										

Description

When on a Residential Tenancy, users should create a Mid Term Change of Sharer opportunity from the tenancy.

AC - Add 'Create Mid Term COS' Button

GIVEN a user has access to create Mid Term COS

WHEN the user views a tenancy that has a *record type* 'Residential Tenancy'

AND *Tenancy Status* is 'Current'

THEN a 'Create Mid-Term COS Opportunity' button will be visible.

AC - Update Renewal Screen Flow

WHEN a user clicks on the 'Create Mid-Term COS Opportunity' button

THEN the existing *Create Renewal* screen will display

AND he '**Renewed From**' field will be prepopulated as follows:

- Populate with the *Opportunity* that is saved on the **contract** record which meets the following criteria:

- The contract is linked to the current *Tenancy*, and
- The contract's *Tenancy Status* is 'Current'

AND the 'Tenancy Type' will be '**Mid Term Change of Sharer**'

AC - Create Mid Term COS

WHEN a user successfully selects 'Save' on the *Create Renewal* screen above

THEN a new Mid Term Change of Sharer opportunity will be created from the 'Renewed From' opportunity as per the existing 'Create Renewal' Quick Action functiona

- Prepopulating opportunity details, including:
 - Populating the **Tenancy** field on the new renewal opportunity with the 'Renewed From' opportunity's *Tenancy*, as per <https://graingerplc.atlassian.net/browse/>
- Creating an offer & offer line item
- Creating opportunity contact roles
- Creating new RTR records and tasks where required, as per <https://graingerplc.atlassian.net/browse/RTR-59>

IA

- Screenflow

Tenancy
Jacob Smycz

Type	Agreement Type	Unit	Start Date	Tenancy End Date	Created
Residential Tenancy	AST	31 Kersley Street, GF, London SW11 4PR	06/04/2025	05/04/2027	

Details

Tenancy Owner	Record Status
Open box	Activated
Document Name	Document Type
Jacob Smycz	
Agreement Type	Actual Move Out Date
AST	09/11/2025
Start Date	Latest Contract Start Date
04/2025	09/11/2025
Tenancy Term (Months)	Latest Contract Term (Months)
1	1
Tenancy End Date	
04/2027	

Additional Information

- Create custom permission 'Create Mid-Term COS Opportunity Button Visibility'
- Add this custom permission to the following permsets
 - PS_Renewal_Administrator_User_Permissions
 - PS_Renewal_Negotiator_User_Permissions
 - PS_Renewal_Manager_User_Permissions

- Have the button conditionally displayed based on this custom permission

Comments

Comment by Jacob Smycz [21/Mar/25]

Anjali Salecha have added details in the IA in ORANGE for the button visibility

Comment by Elisabeta Mihalache [14/Apr/25]

Create Mid-Term COS Opportunity

*Opportunity Name

Renewed From

Tommy Hilfiger - 22 Adlay

*Close Date

Tenancy Type

Mid Term Change Of Sharer

Agreement Type

Available

AST
AST (Affordable)
Non-Housing (Company)
Live Work
Parking Licence

Chosen

Save



Offers (1)

1 item • Sorted by Offer Number • Updated 3 minutes ago

	Offer Nu...	Offer Name	Status	Rent	Uni
1	<input type="checkbox"/> 00085523	22 Adlay Apartments, E16 2YG - 24 Months	Draft	£0.00	22 A

[View All](#)

Agreements (0)

Opportunity test 2.0

test 2.0	
Account Name i	
Tommy Hilfiger	
Stage	
Post Viewing	
Sub Stage	
Tenancy Type	
Mid Term Change Of Sharer	
COS Opportunity? i	
<input checked="" type="checkbox"/>	
Agreement Type	
AST	
Parent Opportunity i	
Tommy Hilfiger - 22 Adlay	
Tenancy	
00049523	
Processed By GREP i	
Not Processed	
Passing Rent Checked In Qube	
<input type="checkbox"/>	
Passing Rent	

Elisabeta Mihalache

Second Opportunity Owner	
TPT / Renewal User	
Close Date	30/09/2025
Lead Source	
Adverse Credit?	
Household income at least 30x rent	
Is Guarantor Required	
Number of occupants	
Opt out of Green Lease	<input type="checkbox"/>
Suppress Automated Renewal Chase Emails i	<input type="checkbox"/>
PMS Reference i	

Opportunity test 2.0

Agreements (0)

Details		Related																									
<p>Contact Roles (2)</p> <p>2 items • Sorted by Primary • Updated 4 minutes ago</p> <table border="1"> <thead> <tr> <th></th> <th>Contact Name</th> <th>Active</th> <th>Role</th> <th>Email</th> <th>Relationship</th> <th>Direct Debit ...</th> <th>Reference Ch...</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Tommy Hilfiger</td> <td><input checked="" type="checkbox"/></td> <td>Lead Tenant</td> <td>hilfigerdummy@graingerplc.com</td> <td></td> <td></td> <td></td> </tr> <tr> <td>2</td> <td>Clair Habgood</td> <td><input checked="" type="checkbox"/></td> <td>Tenant</td> <td>chabgood@graingerplc.com</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>View All</p>					Contact Name	Active	Role	Email	Relationship	Direct Debit ...	Reference Ch...	1	Tommy Hilfiger	<input checked="" type="checkbox"/>	Lead Tenant	hilfigerdummy@graingerplc.com				2	Clair Habgood	<input checked="" type="checkbox"/>	Tenant	chabgood@graingerplc.com			
	Contact Name	Active	Role	Email	Relationship	Direct Debit ...	Reference Ch...																				
1	Tommy Hilfiger	<input checked="" type="checkbox"/>	Lead Tenant	hilfigerdummy@graingerplc.com																							
2	Clair Habgood	<input checked="" type="checkbox"/>	Tenant	chabgood@graingerplc.com																							

Right to Rents

	Right to Rent ID	RTR Validity	Tenant	Status	Time Limited	RTR Expiry
1	<input type="checkbox"/> RTR-00005487		Clair Habgood	Completed	<input checked="" type="checkbox"/>	2 Feb 2025
2	<input type="checkbox"/> RTR-00021927		Tommy Hilfiger	Completed		

Feedback (0)

SVOT - Provide Single View of Tenancy (CJR-392)

[View Decant & License Opportunities from Tenancy](#) Created: 12/Mar/25 Updated: 14/Apr/25 Resolved: 24/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Provide Single View of Tenancy

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:			
Issue links:	Blocks is blocked by	CJR-266	License & Decant Opportunities Relate... Done
Sub-tasks:	Key	Summary	Type
	CJR-256	QA	Subtask
	CJR-257	QA2	Subtask
Grainger Testing:	Pass		
Story point estimate:	1		
Sprint:	CJR Sprint 2		
Rank:	2 j01daf:i		

Description

Currently when you create a decant opportunity from a tenancy, the opportunity is not displayed in any of the tenancy's related lists.

A/C 1 - Add New Related List

GIVEN a tenancy has record type 'Residential Tenancy'

AND Agreement Type is one of: AST, AST (Affordable), Non-Housing (Company), Live Work, Occupation Contract

WHEN a user views the tenancy's 'Related' tab

THEN a new related list will display below the Opportunities related list:

- Name: **License & Decant Opportunities**
- List all opportunity records where the *Originating Tenancy* is the tenancy being viewed
- Display the same columns as the *Opportunities* related list

The screenshot shows the Grainger PLC software interface with three related lists:

- End Of Tenancies (0)**: Shows two items: 1. 00044232 (Renewal, 06/04/2027, 05/04/2029, Draft, CJR-159 renewal) and 2. 00044225 (New, 03/04/2025, 02/04/2027, Activated, CJR-159).
- Opportunities (4)**: Shows four items: 1. CJR-159 (Audit, New, 03/04/2025, 02/04/2027, £910.00). 2. CJR-159 renewal (Audit, Renewal, 06/04/2027, 05/04/2029, £0.00). 3. test renewal_2 (Post Viewing, Renewal, 29/03/2025, 28/03/2027, £0.00). 4. test renewal_3 (Post Viewing, Renewal, 29/03/2025, 28/03/2027, £0.00).
- Decant & License Opportunities**: Shows two items: 1. CJR-159 (Audit, New, 03/04/2025, 02/04/2027, £910.00). 2. CJR-159 renewal (Audit, Renewal, 06/04/2027, 05/04/2029, £0.00).

I

Dynamic related list

Conditional visibility based on agreement type of tenancy

Comments

Comment by Sam Duncan [13/Mar/25]

Nikki are you happy to have a second related list as below?

Grainger PLC		Home	Leads	Accounts	Contacts	Opportunities	Tenancies	Blocks	Buildings	Units
 Tenancy	Tesco									
1	00044232	Renewal		06/04/2027		05/04/2029		Draft		
2	00044225	New		03/04/2025		02/04/2027		Activated		
View All										

End Of Tenancies (0)

Opportunities (4)

4 items • Updated a minute ago

Opportunity Name	Stage	Tenancy Type	Move-In Date
1 CJR-159	Audit	New	03/04/2025
2 CJR-159 renewal	Audit	Renewal	06/04/2027
3 test renewal 2	Post Viewing	Renewal	
4 test renewal 3	Post Viewing	Renewal	29/03/2025

[View All](#)

Decant & License Opportunities

Opportunity Name	Stage	Tenancy Type	Move-In Date
1 CJR-159	Audit	New	03/04/2025
2 CJR-159 renewal	Audit	Renewal	06/04/2027

Comment by Nikki [13/Mar/25]

Sam Duncan that will look strange if you are looking at a decant or license tenancy. Will think of another name.

Comment by Sam Duncan [13/Mar/25]

WE can hide this list for decant/license agreements. Their related opps should appear in the existing "Opportunities" list. Make sense?

Comment by Elisabeta Mihalache [14/Apr/25]

 End Of Tenancies (0)									
 Opportunities (2) 2 items • Updated a minute ago									
<table border="1"> <thead> <tr> <th>Opportunity Name</th> <th>Stage</th> <th>Tenancy Type</th> </tr> </thead> <tbody> <tr> <td>1 Tommy Hilfiger - 22 Adlay</td> <td>Closed Won</td> <td>New</td> </tr> <tr> <td>2 test 2.0</td> <td>Post Viewing</td> <td>Mid Term Change Of Sharer</td> </tr> </tbody> </table> <p>View All</p>	Opportunity Name	Stage	Tenancy Type	1 Tommy Hilfiger - 22 Adlay	Closed Won	New	2 test 2.0	Post Viewing	Mid Term Change Of Sharer
Opportunity Name	Stage	Tenancy Type							
1 Tommy Hilfiger - 22 Adlay	Closed Won	New							
2 test 2.0	Post Viewing	Mid Term Change Of Sharer							

 License & Decant Opportunities (1) 1 item • Updated a few seconds ago						
<table border="1"> <thead> <tr> <th>Opportunity Name</th> <th>Stage ↑</th> <th>Tenancy Ty</th> </tr> </thead> <tbody> <tr> <td>1 Test 3.0</td> <td>Post Viewing</td> <td>New</td> </tr> </tbody> </table> <p>View All</p>	Opportunity Name	Stage ↑	Tenancy Ty	1 Test 3.0	Post Viewing	New
Opportunity Name	Stage ↑	Tenancy Ty				
1 Test 3.0	Post Viewing	New				

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)					
[CJR-194] Update Contracts & Tenancies when Opportunity set back from Audit Created: 06/Mar/25 Updated: 16/Apr/25 Resolved: 27/Mar/25					
Status:	Done				
Project:	Customer Journey - Renewals Project				
Components:	None				
Affects versions:	None				
Fix versions:	Sprint 2				
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube				
Type:	Story	Priority:	Priority 3		
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana		
Resolution:	Done	Votes:	0		
Labels:	Dev_Reviewed, OpenBox, REFINED, Show_Me_Complete, UAT, UAT_Feedback				
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified		
Σ Time Spent:	Not Specified	Time Spent:	Not Specified		
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified		
Attachments:					
Issue links:	Blocks is blocked by CJR-296 Update: Prepopulate Tenancy ID on Con... Done Relates relates to CJR-295 {Salesforce Limit}Residential Contrac... Done relates to CJR-301 Residential Contract: Contract does n... Done relates to CJR-193 Change 'Record Status' Options for Re... Done				
Sub-tasks:	Key	Summary	Type	Status	Assignee
	CJR-293	QA	Subtask	Done	Mudzunga Khonani Davhana
Grainger Testing:	Pass				
Story point estimate:	5				
Sprint:	CJR Sprint 2				
Rank:	2 j012pb:000000d0i				

Description

When an opportunity moves back from 'Audit' to 'Signing' and then moves to 'Audit' again, I want (only) the correct contract to be activated and for the tenancy to contain the signed contract details.

A/C 1 - Set Contract to Draft when Opportunity is moved back from Audit

GIVEN an **opportunity** has *record type* 'Residential Opportunity'

AND **Tenancy Type** is 'New'

AND the **Stage** is 'Audit'

AND there is a **contract** record that is linked to the **Opportunity**:

- AND has *Record Type* 'Residential Contract'
- AND *Record Status* is 'Activated'

WHEN the opportunity **Stage** is updated to 'Signing'

THEN the contract's *Record Status* will be updated to 'Draft'.

A/C 2 - Create/Update a Tenancy on Contract Activation

Updates to functionality implemented in <https://graingerplc.atlassian.net/browse/CJR-46> &<https://graingerplc.atlassian.net/browse/CJR-148>

A/C 1 - Create a Tenancy when a Contract for a New Lease is Activated

GIVEN a contract has a *Record Type* of 'Residential Contract'

AND the **Tenancy Type** is 'New'

~~AND there is no existing contract record with the same PMS Reference as the the linked Opportunity's PMS Reference~~

AND **Tenancy** is null

WHEN the **Record Status** changes to 'Activated'

THEN a new **Tenancy record** will be created with identical details to the activated contract except that:

- *Record Type* = 'Residential Tenancy'
- *Status* = Draft
- *Tenancy_Status* = Draft

AND the **Tenancy** field on the activated **contract** will be updated with the new tenancy record's ID

AND the **Tenancy** field on the linked **opportunity** will be updated with the new tenancy record's ID

AND the **PMS Reference** on the new **Tenancy record** will be populated with the **PMS Reference** on the linked **opportunity**

AND the the **Tenancy** field on the new **Tenancy record** will be populated:

- If the linked opportunity's *Originating Tenancy* is populated => Use that tenancy ID
- If the linked opportunity's *Originating Tenancy* is null AND the linked opportunity's *Parent Opportunity* is populated => Use the *_Parent Opportunity's T_enancy ID* (if any)
- Otherwise: Null

A/C 3

GIVEN a contract has a *Record Type* of 'Residential Contract'

AND the **Tenancy Type** is 'New'

~~AND there is an existing contract record with the same PMS Reference as the the linked Opportunity's PMS Reference (i.e. the "tenancy record")~~

AND **Tenancy** is not null

WHEN the **Record Status** changes to 'Activated'

THEN the **Tenancy's record** will be updated with identical details to the contract, except for the following fields which will not be updated:

- *Record Type*
- *PMS Reference*
- *Tenancy_Status*
- *Status*
- *Latest Contract Start Date*

AND the **Tenancy** field on the activated **contract** will be updated with the tenancy record's ID

AND the **Tenancy** field on the linked **opportunity** will be updated with the **new** tenancy record's ID

AND the the **Tenancy** field on the **new tenancy record** will be populated:

- If the linked opportunity's *Originating Tenancy* is populated => Use that tenancy ID
- If the linked opportunity's *Originating Tenancy* is null AND the linked opportunity's *Parent Opportunity* is populated => Use the *_Parent Opportunity's T_enancy ID* (if any)
- Otherwise: Null

Implementation Approach

- A/C 1 - new flow
- A/C 2
 - Upsert using PMS reference
 - Update existing flow

Comments

Comment by **Nikki** [06/Mar/25]

New Lease Opportunity

GIVEN an Opportunity has (only) one associated Agreement that is:

In a 'Signed' Agreement Status, and

Is linked to a Tenancy with a Tenancy Type 'New'

WHEN the Opportunity's Current Stage is updated to 'Audit'

THEN Tenancy Status & Status are updated to 'Activated'

Comment by Nikki [11/Mar/25]

When opportunity moves to Audit:

- Contract is activated
- Tenancy is created

When opportunity is moved back from Audit:

- Contract should be invalidated (set to draft)

When opportunity moves back to Audit:

- New / same contract should be activated
- Tenancy should be updated

Comment by Matthew Pitcairn [18/Mar/25]

Nikki , AC1; Is it possible for multiple Contracts to meet those criteria?

Comment by Nikki [18/Mar/25]

Matthew Pitcairn , going forward - no; only one active contract. Please note I have added a tenancy type to the logic as well, to limit the scenarios in which that update

Comment by Matthew Pitcairn [18/Mar/25]

Nikki upon reading the further ACs of this story, I see that restriction is being applied — I will endeavour to read the whole story before asking questions 😊

Comment by Matthew Pitcairn [20/Mar/25]

Nikki , 1. which status field should trigger AC2? I see record status but the existing logic references the standard status field

2. In the second half of AC2, I assume you meant existing tenancy as we have not created a new one

Comment by Nikki [20/Mar/25]

Matthew Pitcairn I think I have fixed it?

Comment by Matthew Pitcairn [20/Mar/25]

Nikki looks good, thanks

Comment by Matthew Pitcairn [20/Mar/25]

Nikki and are we looking to copy over values like Rent, Security Deposit Amount , Live Work Clause or Memorandum of Agreement Date?

Comment by Nikki [20/Mar/25]

Hi Matthew Pitcairn

Rent = ideally not, but we don't display the field

Security Deposit Amount = must NOT be updated

Live Work Clause = is a formula?

Memorandum of Agreement Date= Yes should copy over

Comment by Jessica Howe [15/Apr/25]

Opportunity progressed to audit stage -

Opportunity Jelly Cat - CJR194					HomeLet Portal	Edit	Log a Call
Account Name Jelly.Cat	Contract Start Date 17/04/2025	Tenancy End Date 16/04/2026	Agreed Terms 12 Months	Agreed Unit 607 Syren Apt , Ottinger Close, Salford M50	Ren £1,0		
✓	✓	✓	✓	✓	✓	✓	Audit

contract then becomes activated

Contracts (2)						Settings	Print	New
2 items • Sorted by Created Date • Updated a few seconds ago								
Record Number	Record Type	Tenancy Type	Agreement Type	Unit	Record Status			
00062155	Residential Contract	New	AST	607 Syren Apt , ...	Activated			
00062156	Residential Tenancy	New	AST	607 Syren Apt , ...	Draft			

back to signing stage and new contract created, original and new now change to draft

Opportunities > Jelly Cat - CJR194

Contracts

s • Sorted by Created Date • Updated a few seconds ago

<input type="checkbox"/> Record Num... ▾	Record Type ▾	Tenancy Ty... ▾	Agreemen... ▾	Unit	Record
<input type="checkbox"/> 00062155	Residential Contract	New	AST	607 Syren Apt , Ottinger Close, Salford M50	Draft
<input type="checkbox"/> 00062156	Residential Tenancy	New	AST	607 Syren Apt , Ottinger Close, Salford M50	Draft
<input type="checkbox"/> 00062157	Residential Contract	New	AST	607 Syren Apt , Ottinger Close, Salford M50	Draft

new agreement signed, previously signed goes to invalid

Agreements (2)

is • Sorted by Agreement Name • Updated a few seconds ago

<input type="checkbox"/> Agreement Name ↑	Contract	Document ... ▾	Agreement St
<input type="checkbox"/> Adobe Sign Agreement	00062155	AST	Invalid
<input type="checkbox"/> Adobe Sign Agreement	00062157	AST	Signed

stage history:

Opportunities > Jelly Cat - CJR194

Stage History

12 items • Sorted by Last Modified • Updated a few seconds ago

	Stage	Amount	Probability (%)	Expected Rev...	Close Date	Last Modified By
1	Audit	£0.00	95%		15/04/2025	Jessica Howe
2	Signing	£0.00	90%		15/04/2025	Jessica Howe
3	Audit	£0.00	95%		15/04/2025	Jessica Howe

newest contract is now activated

Opportunities > Jelly Cat - CJR194

Contracts

s • Sorted by Created Date • Updated a few seconds ago

<input type="checkbox"/> Record Num... ▾	Record Type ▾	Tenancy Ty... ▾	Agreemen... ▾	Unit	Record
<input type="checkbox"/> 00062155	Residential Contract	New	AST	607 Syren Apt , Ottinger Close, Salford M50	Draft
<input type="checkbox"/> 00062156	Residential Tenancy	New	AST	607 Syren Apt , Ottinger Close, Salford M50	Draft
<input type="checkbox"/> 00062157	Residential Contract	New	AST	607 Syren Apt , Ottinger Close, Salford M50	Activate

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

[CJR-193] Change 'Record Status' Options for Residential Tenancy

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, Show_Me_Complete, UAT, UAT_Feedback		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified

Σ Time Spent:	Not Specified	Time Spent:	Not Specified		
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified		
Attachments:					
Issue links:	Blocks				
	blocks	CJR-53	Import Passing Rent & Current Rent in...		
	blocks	CJR-55	Create/Update Tenancy from Qube [Grai...		
	Relates				
	relates to	CJR-194	Update Contracts & Tenancies when Opp...		
	relates to	CJR-258	Residential Tenancy showing incorrect...		
Sub-tasks:	Key	Summary	Type	Status	Assignee
	CJR-253	QA2	Subtask	Done	
	CJR-265	QA	Subtask	Done	Sarah Jessiman
Grainger Testing:	Pass				
Story point estimate:	5				
Sprint:	CJR Sprint 2				
Rank:	2 j012pb:0000019				

Description

Acceptance Criteria:

A/C 1 - Update Tenancy_Status_c Options for Tenancies

GIVEN a contract record has a record type of 'Residential Tenancy'

THEN the Tenancy_Status__c options will be changed to:

- Draft
- Future
- Current
- Previous

GIVEN a contract record has a record type of 'Commercial Contract' or 'Residential Contract'

THEN the existing Tenancy_Status__c options will remain as:

- Draft
- In Approval Process
- Activated
- Ended - per current functionality cannot be selected directly from the front-end.

Updates to existing SVOT functionality:

<https://graingerplc.atlassian.net/browse/CJR-57> A/C 3 - Add 'All Active Residential Tenancies' List View

WHEN a user selects the 'Tenancies' menu option

THEN a list view of 'All Active Residential Tenancies' will be available

AND the list will display all tenancy records that meet the following criteria:

- Record Type is 'Residential Tenancy'
- AND Tenancy Status Tenancy_Status__c is 'Activated Current'

<https://graingerplc.atlassian.net/browse/CJR-56> A/C 3 - Validation to Ensure Mid-Term Opportunities have a Tenancy

GIVEN an opportunity has record type 'Residential Opportunity'

AND opportunity's Tenancy Type is 'Renewal'

WHEN the opportunity is created or updated

THEN new validation will require the Tenancy field -

- Is populated, and
- The tenancy has a record type 'Residential Tenancy, and
- The tenancy's Tenancy_Status Tenancy_Status__c is 'Activated'

AND the following error message will display: Please create a renewal from the associated tenancy.

AND the Tenancy field will be highlighted / in focus.

<https://graingerplc.atlassian.net/browse/CJR-147> A/C 1 - Initiate EOT from a Decant Tenancy

GIVEN a contract record has a record type 'Residential Tenancy'

AND Tenancy Status Tenancy_Status__c is 'Activated Current'

AND has any Agreement Type including 'Decant Agreement Normal' or 'Decant Agreement Wales'

WHEN a user views the tenancy details screen

THEN a 'Create End of Tenancy' button will be available.

<https://graingerplc.atlassian.net/browse/CJR-119> A/C 2 - Add 'Create Renewal' Button to Tenancy

WHEN the user views a tenancy that has a record type 'Residential Tenancy'

AND Tenancy Status Tenancy_Status__c is 'Activated Current'

THEN a 'Create Renewal Opportunity' button will be visible.

<https://graingerplc.atlassian.net/browse/CJR-123> A/C 2 - Create New License Opportunity from a Tenancy: Add Button

GIVEN a user has access to the existing 'Create License' button on the opportunity

WHEN the user views a tenancy that has a *record type* 'Residential Tenancy'

AND *Tenancy Status* *Tenancy_Status__c* is '**Activated Current**'

THEN a 'Create License Opportunity' button will be available.

<https://graingerplc.atlassian.net/browse/CJR-122> A/C 1 - Add 'Create Decant Opportunity' button to Tenancy.

GIVEN a contract record has a *record type* 'Residential Tenancy'

AND *Tenancy Status* *Tenancy_Status__c* is '**Activated Current**'

WHEN a user views the tenancy details screen

THEN a 'Create Decant Opportunity' button will be visible.

<https://graingerplc.atlassian.net/browse/CJR-71> A/C 2 - Update Tenants Contact Details displayed for a Residential Unit

GIVEN a unit has a record type that is not 'Commercial_Unit'

WHEN a user views the 'Tenants Contact Details' screen for the unit

THEN the contact details will display for any/all **contacts** that meet the following criteria:

- If there is a **contract** record
 - Where the *record type* is 'Residential Tenancy'
 - And the *Unit* is the unit being viewed
 - And the *Tenancy Status* *Tenancy_Status__c* is '**Activated Current**'
- Then identify any linked **tenancy contact role** record(s) where the *End Date* is null

<https://graingerplc.atlassian.net/browse/CJR-146>

Report 1 - Residential Tenancies with no Active Child Contracts / Report Name: Active Tenancies with no Active Contract

Create a report of each *Contract* record that meets all of the following criteria:

- Record type = 'Residential Tenancy'
- Record Status *Tenancy_Status__c* = '**Activated Current**'
- The record has **no child records** where *Record Status* = Activated

Extract 3 - Identify Residential Units with no associated Tenancy / Report Name: Residential Units with no active Tenancy

Create a list of *Unit* records that meet all of the following criteria:

- Unit *record type* is not 'Commercial Unit'
- The unit is **not** linked to a *Contract* record:
 - with *Record Type* 'Residential Tenancy' [*Contract.Unit__c*]
 - AND *Record Status* *Tenancy_Status__c* = '**Activated Current**'

Comments

Comment by [Anjali Salecha](#) [18/Mar/25]

Hi [Nikki](#) , For your review, attached is the list of existing logic where *Tenancy_Status__c* is being referred. I believe, we will need to update the Tenancy (Contract) PB Handler's implementation(specified on row # 7)

Also, as discussed with [Sam Duncan](#) , Since *Tenancy_Status__c* value changes are done by system processes so it should be read only on the front end. Please confirm.

S. No.	Reference Type	Reference Label	JIRA Reference
1	ApexClass	TenancyHierarchyController	https://graingerplc.atlassian.net/browse/CJR-145
2	FlexiPage	Unit_Record_Page	CJR-57
3	FlexiPage	Opportunity_Record_Page	CJR-56
4	FlexiPage	Residential_Tenancy_Record_Page	
5	FlexipageFieldInstance	Commercial Contract Record Page	
6	FlexipageFieldInstance	Residential Contract Record Page	
7	Flow	Tenancy_(Contract) PB Handler	When <i>Tenancy_Status__c</i> is changed to Activated then (Node - Tenancy Activated) (i) Update related unit's Future Vacant Date (ii) Stamp Tenancy End Date on Opportunity Contact Role records
8	Flow	EoT- Check Out (Task Subflow)	FVVP-140
9	Flow	EoT - Update Tenancy When Opportunity Stage Changes	FVVP-172
10	Flow	Activate Tenancy When Opportunity Stage Changes to Closed Won	https://graingerplc.atlassian.net/browse/CJR-44
11	Flow	EoT - Update Tenancy When Opportunity Stage Changes	FVVP-172
12	Flow	Tenancy After Update	https://graingerplc.atlassian.net/browse/CJR-43
13	Flow	AVM Create End of Tenancy	AVM-14
14	Flow	RTF Commercial Lease Update	https://graingerplc.atlassian.net/browse/CLTL-18
15	Flow	Tenancy - Manage Tenancy and Contact Roles - After Save	https://graingerplc.atlassian.net/browse/CJR-46
16	Flow	Tenant Contact Details	https://graingerplc.atlassian.net/browse/CJR-71
17	Flow	Tenancy - Create Renewal	https://graingerplc.atlassian.net/browse/CJR-119
18	Report	Active_Tenancies_with_no_Active_Contract_BJK	CJR-146

19	Report	Active_Contracts_with_No_Tenancy_cBw	CJR-146
20	Report	South_Team_Current_And_Future_Move_Ins	existing
21	Report	Residential_Units_wo_associated_Tenancy_r1d	existing
22	ValidationRule	Ensure_Mid_Term_Opps_have_Tenancy	CJR-56

Comment by [Nikki](#) [18/Mar/25]

Anjali Salecha , there is a known scenario in which Tenancy_Status__c will need to be manually updated. <https://graingerplc.atlassian.net/browse/CJR-132>

I think realistically, Grainger will also need to update / activate contracts when they review the data migration.

cc [Sam Duncan](#)

Comment by [Anjali Salecha](#) [19/Mar/25]

Hi [Nikki](#) , there is existing current implementation - When Tenancy_Status__c is changed to Activated then

- (i) Update related unit's Future Vacant Date
- (ii) Stamp Tenancy End Date on Opportunity Contact Role records

Do we need to make changes to above implementation?

Comment by [Nikki](#) [19/Mar/25]

Hi [Anjali Salecha](#) , What update is made to the FV Date? Is it deleted?

If we don't make changes, will changing the Tenancy_Status__c on the Residential Contract record still trigger these updates?

I don't think we should be updating the unit or the OCRs from a tenancy; so I don't think we should change it.

Comment by [Anjali Salecha](#) [19/Mar/25]

Hi [Nikki](#) , Yes, It is an existing implementation. If we don't make changes, changing the Tenancy_Status__c on the Residential Contract record will trigger the updates on Unit and OCRs.

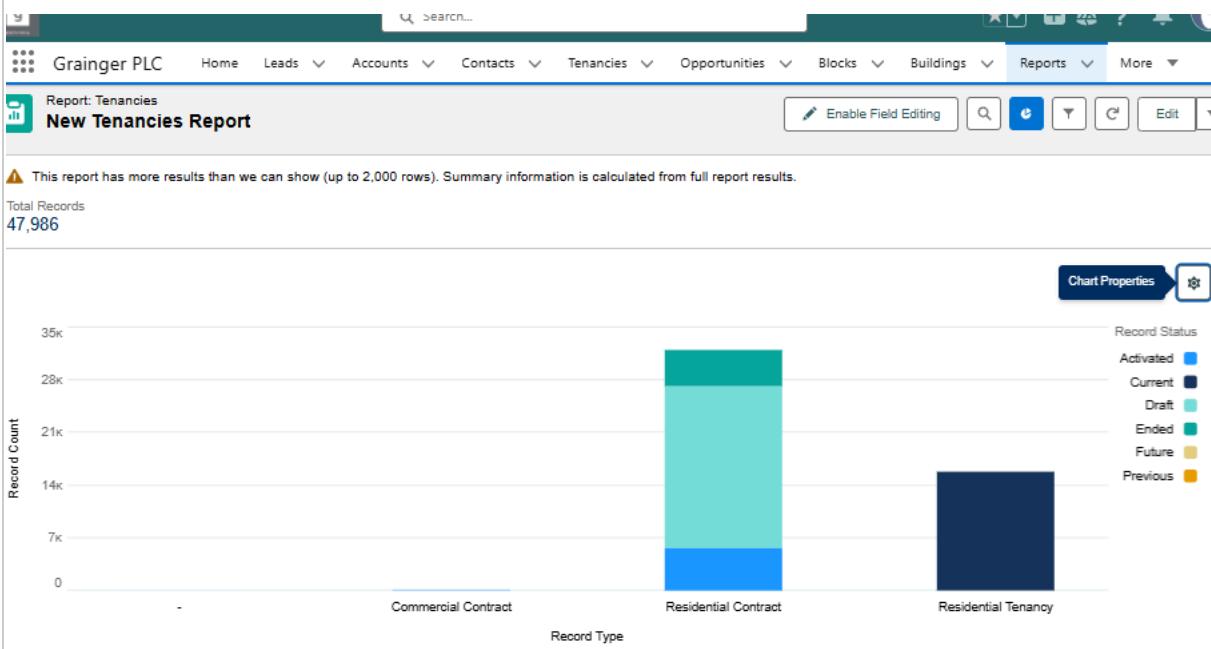
Comment by [Nikki](#) [20/Mar/25]

Demo Feedback Request:

- Tenancies should have status: Future, Current, Previous
- Contracts should have status: Draft, Current, Previous

Comment by [Helen Douglas-Teggart](#) [15/Apr/25]

Pass



SVOT - Provide Single View of Tenancy (CJR-392)

↳ [CJR-183] [Rename Tenancy List](#) Created: 06/Mar/25 Updated: 14/Apr/25 Resolved: 11/Mar/25

Status: Done

Project:	Customer Journey - Renewals Project		
Components:	None		
Affects versions:	None		
Fix versions:	Sprint 2		
Parent:	SVOT - Provide Single View of Tenancy		

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Sub-tasks:	Key	Summary	Type	Status
	CJR-207	QA	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	0.5			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:0009			

Description

Rename 'All Active Tenancies' list to "All Active Residential Tenancies"

The screenshot shows a Jira interface with a sidebar on the left containing a pinned list titled "All Active Tenancies". The list has 5 items, with the first item being "All Active Tenancies (Pinned list)" which is checked. Other items include "All Activated Contracts", "All Contracts", "All Draft Contracts", "All In Approval Contracts", and "Commercial Tenancies".

Comments

Comment by [Helen Douglas-Teggart](#) [14/Apr/25]

Pass

The screenshot shows the Grainger PLC Jira interface. At the top, there's a navigation bar with links for Home, Leads, Accounts, Contacts, Tenancies (which is currently selected), Opportunities, and Blocks. Below the navigation is a search bar labeled 'Search...'. The main content area is titled 'Recently Viewed' and lists 50+ items. The items are categorized under 'LIST VIEWS' and include various contract types: All Activated Contracts, All Active Residential Tenancies, All Contracts, All Draft Contracts, All In Approval Contracts, Commercial Tenancies, My Activated Contracts, My Draft Contracts, My In Approval Contracts, and Recently Viewed (Pinned list). Below this list are three specific contract entries: 00021302 (Eloise Jephson), 00014425 (Eloise Jephson), and 00053914 (Letizia Mattanza).

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

[↳ \[CJR-181\] Update Validations on Contract to Exclude Residential Tenancy Record Type](#) Created: 05/Mar/25 Updated: 25/Apr/25

Resolved: 17/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Sarah Jessiman
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:																
Issue links:	Relates relates to CJR-235 Can't edit Residential Contract field... Done															
Sub-tasks:	<table border="1"> <thead> <tr> <th>Key</th> <th>Summary</th> <th>Type</th> <th>Status</th> <th>Assignee</th> </tr> </thead> <tbody> <tr> <td>CJR-229</td> <td>QA2</td> <td>Subtask</td> <td>Done</td> <td>Nadia Swarts</td> </tr> <tr> <td>CJR-233</td> <td>QA</td> <td>Subtask</td> <td>Done</td> <td>Sarah Jessiman</td> </tr> </tbody> </table>	Key	Summary	Type	Status	Assignee	CJR-229	QA2	Subtask	Done	Nadia Swarts	CJR-233	QA	Subtask	Done	Sarah Jessiman
Key	Summary	Type	Status	Assignee												
CJR-229	QA2	Subtask	Done	Nadia Swarts												
CJR-233	QA	Subtask	Done	Sarah Jessiman												
Grainger Testing:	Pass															
Story point estimate:	0.5															
Sprint:	CJR Sprint 2															
Rank:	2 j012pb:000004															

Description

A/C 1 - Update Contract Term Validation

This validation needs to be updated; it should only apply to *Contract* records with record type 'Residential Contract'.

Contract Validation Rule

[Back to Contract Validation Rules](#)

Validation Rule Detail	
Rule Name	Tenancy_Term_for_Welsh_Properties
Error Condition Formula	<pre>CONTAINS(Opportunity__r.RecordType.DeveloperName, "Residential_Opportunity") && ISPICKVAL(Agreement_Type__c, "Occupation Contract") && (ContractTerm <= 1 && ContractTerm <= 2 && ContractTerm <= 3 && ContractTerm <= 4 && ContractTerm <= 5 && ContractTerm <= 6 && ContractTerm <= 7 && ContractTerm <= 8 && ContractTerm <= 9 && ContractTerm <= 10 && ContractTerm <= 11 && ContractTerm <= 12 && ContractTerm <= 18 && ContractTerm <= 24 && ContractTerm <= 30 && ContractTerm <= 36)</pre>
Active	<input checked="" type="checkbox"/>
Error Message	The Tenancy Term (months) can only be one of the following values: 6, 7, 8, 9, 10, 11, 12, 18, 24, 30, 36.
Description	TSW - The Tenancy Term for a Tenancy with 'Occupation Contract' as the Agreement Type should have only one of the following values: 6, 7, 8, 9, 10, 11, 12, 18, 24, 30, 36. RSW - 10/25 - add 1to5 months-renewal team CLTL 69
Created By	Open box , 22/02/2024, 10:20
Modified By	Open box , 25/02/2025, 16:51
Edit Clone	

A/C 2 - Update MOA Validation

This validation needs to be updated; it should only apply to *Contract* records with record type 'Residential Contract'.

Contract Validation Rule

[Back to Contract Validation Rules](#)

Validation Rule Detail	
Rule Name	New_Tenancy_cannot_have_MOA
Error Condition Formula	<pre>AND(NOT(Setup.Configuration__c.Are_Validations_Off__c), ISPICKVAL(Tenancy_Type__c, "New"), INCLUDES(Document_Type__c, "Memo of Agreement (any change of)"), CONTAINS(Opportunity__r.RecordType.DeveloperName, "Residential_Opportunity"))</pre>
Active	<input checked="" type="checkbox"/>
Error Message	"Memo of Agreement (any change of)" cannot be selected for a new Tenancy
Description	CI-6488 "Memo of Agreement (any change of)" cannot be selected if Tenancy Type is NEW https://graingerplc.atlassian.net/browse/CLTL-69 (Record Type Check)
Created By	David Picklesley, 20/07/2020, 16:43
Modified By	Open box , 25/02/2025, 08:32
Edit Clone	

Comments

Comment by [Matthew Pitcairn](#) [11/Mar/25]

Nikki , currently these validations also check the related Opportunity record type, do we want to retain the part of the validation or replace with only checking the Tenancy record type?

```
INCLUDES(Document_Type__c, "Memo of Agreement (any change of)"),
CONTAINS(Opportunity__r.RecordType.DeveloperName, "Residential_Opportunity")
```

Comment by [Nikki](#) [11/Mar/25]

Hi Matthew Pitcairn , I don't think we need the opportunity record type to be checked as well. Seems redundant.

Comment by [Matthew Pitcairn](#) [11/Mar/25]

Nikki , makes sense, thanks

Comment by [Matthew Pitcairn](#) [17/Mar/25]

Nadia Swarts Nikki for AC2: some of the layouts for non Residential Contract records don't have the necessary MoA fields to test the negative case for this AC — are you fine with us passing just the positive case?

Comment by [Nikki](#) [17/Mar/25]

Matthew Pitcairn Nadia Swarts , yes. Thanks

Comment by Helen Douglas-Teggart [16/Apr/25]

No privilege's to edit activated tenancy.

Draft tenancy able to change term to 1000 months.

▼ Details

Tenancy Owner	Helen Douglas-Teggart	Tenancy Type	Renewal
Account Name	Holly Whittaker	Agreement Type	AST
Record Status	Draft	Document Type	AST
Contract Term (months)	1,000	Memorandum of Agreement Date	
Start Date	16/04/2025	Tenancy	00055309
End Date	15/08/2108	Opportunity	45 Ancoats test
Actual Move Out Date			

▼ Additional Information

Comment by Sarah Jessiman [17/Apr/25]

Helen Douglas-Teggart Could we please have the link to the activated tenancy record you were having edit issues with so that we can check this on our side. Thanks

Comment by Helen Douglas-Teggart [23/Apr/25]

Sarah Jessiman <https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Contract/800Pv00000G7RohIAF/view>

Hi Sarah - linked above. Might be because it's draft?

Might need a quick permission change set to pass this one [Jacob Smycz](#)

Comment by Jacob Smycz [23/Apr/25]

Helen Douglas-Teggart Hi Helen - have tried and seems all is working correctly for non-Welsh ones. Please could you try another test with an Occupation Contract and a term of some random amount

cc Sarah Jessiman

Comment by Helen Douglas-Teggart [25/Apr/25]

Tenancy Owner: Jessica Howe

* Account Name: Arsh Deep Waris

Record Status: Draft

Contract Term (months): 1,000

The Contract Term (months) can only be one of the following values: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 18, 24, 30, 36.

Start Date: 22/07/2024

End Date: 21/07/2025

Actual Move Out Date:

Tenancy: 00055309

Opportunity: Waris - 1413 Copper W...

We hit a snag.

Review the following fields

- Contract Term

Cancel Save

Grainger PLC Home Leads Accounts Contacts Tenancies Reports More

Tenancy 00005180

Anita Masters

* Account Name Keeley Winter

Record Status Draft

Contract Term (months) 12

Start Date 14/04/2021

End Date 13/04/2022

Actual Move Out Date

Document Type

Available AST Prescribed Information

Chosen Memo of Agreement (an...)

"Memo of Agreement (any change of)" cannot be selected for a new Tenancy

View all dependencies

Memorandum of Agreement Date 30/04/2025

Tenancy

Opportunity GREP-CoA Miss Keeley Winter & Mr Rhys Shirley - 18 Brac X

Both pass

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

[\[CJR-180\] Add External ID to Tenancy Contact Role](#) Created: 05/Mar/25 Updated: 23/Apr/25 Resolved: 07/Mar/25

Status:	Done		
Project:	Customer Journey - Renewals Project		
Components:	None		
Affects versions:	None		
Fix versions:	Sprint 2		
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube		

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	Integrations, OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:																
Issue links:	Blocks blocks CJR-118 Create & Update Tenancy Contact Roles...															
Sub-tasks:	<table border="1"> <thead> <tr> <th>Key</th> <th>Summary</th> <th>Type</th> <th>Status</th> <th>Assignee</th> </tr> </thead> <tbody> <tr> <td>CJR-186</td> <td>QA2</td> <td>Subtask</td> <td>Done</td> <td>Nadia Swarts</td> </tr> </tbody> </table>		Key	Summary	Type	Status	Assignee	CJR-186	QA2	Subtask	Done	Nadia Swarts	To Do			
Key	Summary	Type	Status	Assignee												
CJR-186	QA2	Subtask	Done	Nadia Swarts												
Grainger Testing:	Pass															
Story point estimate:	0.5															
Sprint:	CJR Sprint 2															
Rank:	2 j0193g:67qi															

Description

The GREP integration will upsert Tenancy Contact Role records using an external id: <PMS Reference Number>_<Salesforce Contact Id> - e.g. 103385001006_003Nz0000053rg3IAA

A/C 1 - Add External ID to Tenancy Contact Role

Add a new field to the Tenancy Contact Role object:

- [Tenancy_Contact_Role__c].[External_Id__c]
- Label: External Id
- type text (255 characters), external Id, Unique,
- FLS: editable by GREP and visible to GEN-Contract permission set.
- Help Text: <PMS Reference Number>_<Salesforce Contact Id>

A/C 2 - View External ID

Add the field to the system information section:

Edit a2iPv00000CnpTt

* = Required Information

Tenancy Contact Role Name	a2iPv00000CnpTt	* Start Date	01/01/2024
* Contact ID	Edward Simons	End Date	
* Role	Lead Tenant	* Contract ID	00038310
Other		View all dependencies	
Relationship	--None--	View all dependencies	

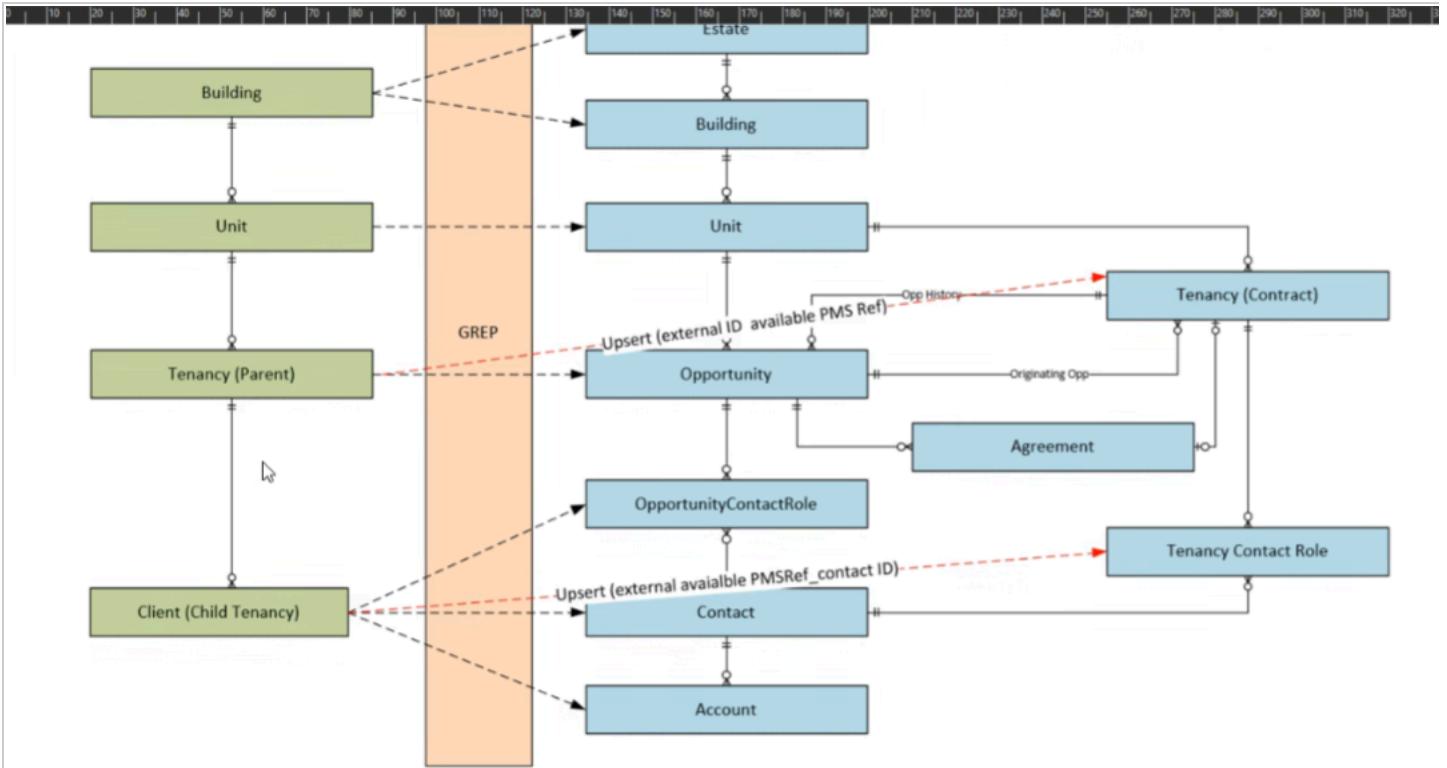
System Information

Created By	Open box, 28/02/2025, 11:14	Last Modified By	Open box, 28/02/2025, 13:05
------------	-----------------------------	------------------	-----------------------------

Cancel Save & New Save

Comments

Comment by Nikki [05/Mar/25]



Comment by Nikki [05/Mar/25]

Matthew Pitcairn , thanks for picking up so quickly! please note I just added the field name they are expecting:

- External_Id__c

Comment by Matthew Pitcairn [05/Mar/25]

Nikki , no problem — the field API name matches what you noted below

Comment by Helen Douglas-Teggart [14/Apr/25]

Need to retest - issues with contact details and below:-

Unit Details					
Building	Block	Unit Status	Bedrooms	Bathrooms	Priority Flag
The Forge Apts. North, Newcastle, NE1 3AA	Forge - North Apartments	Tenanted	2 Bedrooms	2	

Tenants Contact Details			
Role: Permitted Occupier	Full Name: a2IPv00000Cwdjy	Phone / Mobile: 0700000014/	Email: leuishallnufc@graingerplc.com

Comment by Sarah Jessiman [15/Apr/25]

Helen Douglas-Teggart Jacob will be in touch regarding this issue. Thanks

cc: Jacob Smycz

Comment by Helen Douglas-Teggart [23/Apr/25]

Cannot see External ID

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings Units Tasks Reports Dashboards

Person Account Brad Pitt

Account Information

Account Name	Brad Pitt	18 digit Contact
Birthdate		003Pv00000ItuyZIAQ
		Pets

Right to Rent Information

RTR Time Limited	Date Next RTR Required
RTR Expiry Date	Reported to Home Office

Contact Information

Phone	Mobile
07000000025	07000000014
Email	Different WhatsApp Number?
bradpitt@graingerplc.com	<input type="checkbox"/>
Opt into Marketing	<input type="checkbox"/>

Address Information

Billing Address	Shipping Address
Current Address	Future Address

System Information

Created By	Last Modified By
Jessica Howe, 16/04/2025, 10:53	GREP Integration User, 23/04/2025, 11:32

Sandbox: UAT | [Log out](#)

Contact Information

Phone	Mobile
07000000025	07000000014
Email	Different WhatsApp Number?
bradpitt@graingerplc.com	<input type="checkbox"/>
Opt into Marketing	
<input type="checkbox"/>	

Address Information

Billing Address		Shipping Address	
Billing Street		Shipping Street	
Billing City	Billing State/Province	Shipping City	Shipping State/Province
Billing Zip/Postal Code	Billing Country	Shipping Zip/Postal Code	Shipping Country
Current Address		Future Address	
Current Street		Future Street	
Current City	Current State/Province	Future City	Future State/Province
Current Zip/Postal Code	Current Country	Future Zip/Postal Code	Future Country

System Information

Created By	Last Modified By
Jessica Howe, 16/04/2025, 10:53	GREP Integration User, 23/04/2025, 11:32

Future Address

[Cancel](#) [Save & New](#) [Save](#)

Jacob Smycz

Comment by Jacob Smycz [23/Apr/25]

Helen Douglas-Teggart these are the accounts - to get to the tenancy contact role you need to click here

Tenancy
Jacob Smycz

Record Type	Agreement Type	Unit	Start Date	Tenancy End Date
Residential Tenancy	AST	Apt 503, Abbeville Apts, 37 London Rd, Barkin	01/03/2025	

Details Related **Tenants**

Current Tenancy Contact Roles (1)

1 item • Filtered by End Date • Updated a few seconds ago

<input type="checkbox"/> Contact ID	Role	Start Date
1 <input type="checkbox"/> Jacob Smycz	Lead Tenant	01/03/2025

[View All](#)

and then click edit

SVOT - Provide Single View of Tenancy (CJR-392)

[CJR-176] Update Tenancy Related Lists Created: 04/Mar/25 Updated: 11/Apr/25 Resolved: 06/Mar/25

Status:	Done		
Project:	Customer Journey - Renewals Project		
Components:	None		
Affects versions:	None		
Fix versions:	Sprint 2		
Parent:	SVOT - Provide Single View of Tenancy		

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Issue links:	Cloners clones CJR-145		View Tenancy Hierarchy	Done
Sub-tasks:	Key	Summary	Type	Status
	CJR-195	QA	Subtask	Done
Assignee:				Mudzunga Khonani Davhana
Grainger Testing:	Pass			
Story point estimate:	0.5			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:001			

Description

A/C 1 - Update Related List of Contracts linked to a Tenancy

GIVEN a contract record has a record type 'Residential Tenancy'

WHEN a user views the tenancy's existing **Related > Contracts** list for a 'Residential Tenancy' contract record

THEN the following columns will be displayed:

- Record number
- Tenancy Type
- Start Date
- End Date
- Record Status
- Opportunity name

The screenshot shows two related lists for a 'Residential Tenancy' record. At the top, there is a summary of the tenancy details: Record Type (Residential Tenancy), Agreement Type (AST), Unit (Flat 7, Crofton Mansion, Liverpool, L17), Start Date (01/03/2025), and End Date (30/06/2025). Below this, the 'Tenancy Contact Roles' list displays two items, both labeled 'Test Person Account'. The 'Contracts' list shows six items, all labeled 'Test 1', with columns for Record Number, Account Name, Record Type, Record Status, and Status.

A/C 2 - Update Tenancy > Opportunity Related List

GIVEN a contract record has a record type 'Residential Tenancy'

WHEN a user views the tenancy's existing **Related > Opportunities** for a 'Residential Tenancy' contract record

THEN the following columns will be displayed:

- Opportunity name
- Stage
- Tenancy Type
- Move In Date
- Tenancy End Date
- Rent

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Tenancy Shaun Baldwin

Opportunities (1)
1 item • Updated 5 minutes ago

Opportunity Name	Stage	Close Date	Amount
Shaun Baldwin - New Lease - 808 Halogen	Audit	31/03/2025	

Create End of Tenancy Edit Change Owner Delete

View All

Comments

Comment by Helen Douglas-Teggart [11/Apr/25]

AC1 - displaying correctly + rent and uplift

Tenancy
Xiaozheng Li

Record Type	Agreement Type	Unit	Start Date	Tenancy End Date
Residential Tenancy	AST	712 Torrens Apt, Waterman Wlk, Salford M50	18/11/2024	26/09/2024

Details Related Tenants

Contracts (1)

1 item • Sorted by Record Number • Updated a minute ago

Record Num...	Tenancy Ty...	Start Date	End Date	Record Status	Opportunity
1 00035359	New	27/03/2024	26/09/2024	Activated	GREP-CoA Lai Man Kit and Ngai Fan Kwong -

View All

End Of Tenancies (0)

AC2 - displaying correctly

Opportunities (1)

1 item • Updated 2 minutes ago

Opportunity Name

1 GREP-CoA Lai Man Kit and Ngai Fan Kwong - 712 Torrens Apt, Waterman Wlk, Salford M50

View All

License & Decant Opportunities (0)

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

[CJR-174] Data Migration: Link Parking & Decant Tenancies to Live Unit Tenancy Created: 04/Mar/25 Updated: 23/Apr/25 Resolved: 14/Apr/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, UAT		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Attachments:	
Issue links:	Blocks is blocked by CJR-47 Data Migration - Create Tenancy for a... Done Relates relates to CJR-403 Data Migration - tenancies not linked Done
Grainger Testing:	Pass
Story point estimate:	3
Sprint:	CJR Sprint 3
Rank:	2 012pb:000000zx00i

Description

When all active tenancies are migrated from Qube, I want any license and decent agreement tenancies to be linked to the live unit tenancy in Salesforce, so that users can easily find related tenancies.

- Limitation: The account will be used as the means to link tenancies. Where there are many live unit tenancies (e.g. Mears) these will not be accommodated by the data migration.
- Update can only run after: <https://graingerplc.atlassian.net/browse/CJR-47>

Grainger plc		QUBE - Current Tenants and Units											
		QUBE UNIT DATA					QUBE TENANT DATA						
Unit	SFDC Unit ID	Unit address	Unit tenure	Unit Type	Unit Status	Tenancy Ref	Name	Status	Parent/Child ref	SFDC coi	Tenants	Tenant Address	address for garages/sheds etc
108940001_a1G4J00000025uzm UAA	9, Brierley Green, Marton in Cleveland, Middleton-in-Teesdale, Cleveland, North Yorkshire, TS10 0LH	AST	Mid Terrace	Tenanted	1089540010001	Francis Brian Doublett	Current	Multi-party lease	Tenant	9 Brierley Green			
108940001_a1G4J00000025uzm UAA	9, Brierley Green, Marton in Cleveland, Middleton-in-Teesdale, Cleveland, North Yorkshire, TS10 0LH	AST	Mid Terrace	Tenanted	1089540010502	Mr Francis Doublett	Current	Sharer	0034J000000	Tenant	9 Brierley Green		
108954003_a1G4J00000025v1j UAA	69, Brierley Green, Cleveland, Middlesbrough, Cleveland, North Yorkshire, TS10 0LH	Licence	Garage	Tenanted	108954003001	Francis Brian Doublett	Current	Multi-party lease	Tenant	9 Brierley Green			
108954003_a1G4J00000025v1j UAA	69, Brierley Green, Cleveland, Middlesbrough, Cleveland, North Yorkshire, TS10 0LH	Licence	Garage	Tenanted	108954003601	Mr Francis Doublett	Current	Sharer	0034J000000	Tenant	9 Brierley Green		10894001

A/C 1 - Link License & Decant Tenancies to the Main Tenancy.

GIVEN an **account** has one (and only one) contract record (aka the "primary tenancy") where:

- *Record Type* = Residential tenancy
- **AND Record Status** = Activated
- **AND Agreement Type** is **not** Licence, Decant Agreement Normal, or Decant Agreement Wales

AND the same account has one or more contract records where:

- *Record Type* = Residential tenancy
- **AND Record Status** = Activated
- **AND Agreement Type** is Licence, Decant Agreement Normal, or Decant Agreement Wales

WHEN the data migration runs

THEN the **licence record(s)** will be updated:

- Tenancy ID = the primary tenancy

Comments

Comment by [Nikki](#) [13/Mar/25]

[Matthew Cornfield](#), I removed the status criteria.

Comment by [Matthew Cornfield](#) [10/Apr/25]

[Nikki](#) Can I move this story back into done and work on the UAT feedback ticket rather?

Comment by [Nikki](#) [10/Apr/25]

[Matthew Cornfield](#) back into testing!

Comment by [Helen Douglas-Teggart](#) [23/Apr/25]

Linked parking:

Sandbox Environment

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings Units Tasks Reports Dashboards C

Search...

Tenancy Daniel Bellis

Actual Move Out Date

Additional Information

Unit i	Parking 100 Enigma Square	Current Rent i
Uplift %	6.00%	Security Deposit Amount
Previous Rent i		£0.00
Break Clause		TDS Reference
Renewal 1 month		Live Work Clause
Special Clauses		Special Clause Free Text
Description		
Licence		

Vehicle Details (Parking License Only)

Vehicle Make	Vehicle Model
Vehicle Registration	

System Information

PMS Reference i	222710100001	Record Number	00085769
Record Type	Residential Tenancy	Status	Draft
Tenancy i	00085765	Created By	 Open box, 22/04/2025
Last Modified By	 Open box, 22/04/2025, 19:45		

Primary tenancy:

Important Shared D... Customer Analytics... UPDATED Lease End... Grainger homes MAP STAGING SF Grainger PLC ReSource Projects - Jira X 2

Sandbox: UAT | Log out

Search...

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings Units Tasks Reports Dashboards Cal

Tenancy
Daniel Bellis

24 AST
Start Date Memorandum of Agreement C
27/04/2023
Latest Contract Start Date Arrears
Tenancy End Date GPLC Notice Initiated
26/11/2024
Actual Move Out Date

Additional Information

Unit Current Rent
807 Enigma Square, 414 North Row, MK9 2FU
Uplift % Security Deposit Amount
6.00% £1,320.00
Previous Rent TDS Reference
Break Clause Live Work Clause
No Break
Special Clauses Special Clause Free Text
Description AST

System Information

PMS Reference Record Number
222708247001 00085765
Record Type Status
Residential Tenancy Draft
Tenancy Created By
Last Modified By Open box, 22/04/2025, 19:40

Tenancies:

2	RTR-00004833	Not started
View All		

Tenancies (2)

2 items • Sorted by Record Number • Filtered by Record Type • Updated a few seconds ago

Record ...	Record Type	Agreement Type	Unit	Tenancy Start D...	Tenancy En...	Record Sta...	
1	00085769	Residential Tenancy	Licence	Parking 100 Eni...	27/04/2023	26/11/2024	Current
2	00085765	Residential Tenancy	AST	807 Enigma Squ...	27/04/2023	26/11/2024	Current

Authorisations (2)

Authorisation Number	Status	Payment Route Selected	Last Modified Date
AUTH-000045245	In Force	Direct Debit	25/05/2024, 06:15
AUTH-000045537	Awaiting submission	Direct Debit	03/05/2023, 12:22

View All

Would be good to flag primary tenancies in future sprint

SVOT - Provide Single View of Tenancy (CJR-392)

[\[CJR-172\] Access Control: Create Renewal / License / Decant](#) Created: 04/Mar/25 Updated: 17/Apr/25 Resolved: 18/Mar/25

Status:	Done		
Project:	Customer Journey - Renewals Project		
Components:	None		
Affects versions:	None		
Fix versions:	Sprint 2		
Parent:	SVOT - Provide Single View of Tenancy		

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, UAT, UAT_Feedback		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Sub-tasks:	Key	Summary	Type	Status
	CJR-246	QA	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	0.5			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:000002			

Description

The following users should have access to buttons on the *Residential Tenancy* screen:

- *Create Renewal Opportunity* - Renewals negotiators
- *Create Parking License Opportunity* - Renewals negotiators, TPT, Lettings
- *Create Decant Agreement Opportunity* - Renewals negotiators, TPT, Lettings
- *Create End of Tenancy* - Majority of users; added to PSG already

[Jacob Smycz](#) to add permission sets

Renewal Perm Sets

PS_Renewal_Administrator_User_Permissions
PS_Renewal_Negotiator_User_Permissions
PS_Renewal_Manager_User_Permissions

Resi Lettings Perm Sets

PS_Residential_Lettings_User_Permissions
PS_Residential_Lettings_Senior_User_Permissions
PS_Residential_Lettings_Manager_User_Permissions

TPT Perm Sets

PS_Tenancy_Progression_User_Permissions
PS_Tenancy_Progression_Manager_User_Permissions

Comments

Comment by [Jacob Smycz](#) [17/Mar/25]

Hi [Mudzunga Khonani Davhana](#) the permission Set Groups to check are as follows:

- Lettings_User
- Lettings_Senior_Negotiator
- Lettings_Manager
- Renewal_Administrator
- Renewal_Negotiator
- Renewal_Manager
- Tenancy_Progression_User
- Tenancy_Progression_Manager

The Create Renewal Button should be visible to all the renewal PSGs

The Create Parking and Create Decant should be visible to all the above PSGs

Let me know if there are any further questions

Comment by [Mudzunga Khonani Davhana](#) [17/Mar/25]

Hi Jacob Smycz , thank you 😊

Comment by Elisabeta Mihalache [17/Apr/25]

Lettings set works

A screenshot of a software interface. At the top, there is a toolbar with several buttons: 'Create End of Tenancy', 'Create Licence Opportunity', 'Create Decant Opportunity', 'Edit' (with a dropdown arrow), and 'Change Owner'. Below the toolbar, there is a large, mostly empty white area with some horizontal grey bars near the top. A small blue pencil icon is located on the right side of the main area.

renewals works

A screenshot of a software interface. At the top, there is a toolbar with buttons: 'Create End of Tenancy', 'Create Renewal Opportunity', 'Create Licence Opportunity', 'Create Decant Opportunity', and a dropdown arrow. Below the toolbar, there is a large, mostly empty white area with some horizontal grey bars near the top. A context menu is open, showing options: 'Create Mid-Term COS Opportunity', 'Edit', and 'Change Owner'. The 'Change Owner' option is highlighted with a blue border. A small blue pencil icon is located on the right side of the main area.

us

Type

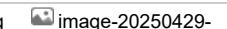
Type

TPT works

Create End of Tenancy | Create Licence Opportunity | Create Decant Opportunity | Edit ▾

[Change Owner](#)

status

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)														
↳ [CJR-171] Link Tenancies created to Opportunities & Contracts <small>Created: 04/Mar/25 Updated: 02/May/25 Resolved: 17/Mar/25</small>														
Status:	Done													
Project:	Customer Journey - Renewals Project													
Components:	None													
Affects versions:	None													
Fix versions:	Sprint 2													
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube													
Type:	Story	Priority:	Priority 3											
Reporter:	Nikki	Assignee:	Nadia Swarts											
Resolution:	Done	Votes:	0											
Labels:	OpenBox, REFINED, Show_Me_Complete, UAT, UAT_Feedback													
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified											
Σ Time Spent:	Not Specified	Time Spent:	Not Specified											
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified											
Attachments:	   													
Issue links:	Relates relates to CJR-46 Create/Update Tenancies Done relates to CJR-55 Create/Update Tenancy from Qube [Grai... Done relates to CJR-165 [Not Required] - Tenancy created in d... Done													
Sub-tasks:	<table border="1"> <thead> <tr> <th>Key</th><th>Summary</th><th>Type</th><th>Status</th><th>Assignee</th></tr> </thead> <tbody> <tr> <td>CJR-231</td><td>QA2</td><td>Subtask</td><td>Done</td><td>Nadia Swarts</td></tr> </tbody> </table>	Key			Summary	Type	Status	Assignee	CJR-231	QA2	Subtask	Done	Nadia Swarts	
Key	Summary	Type	Status	Assignee										
CJR-231	QA2	Subtask	Done	Nadia Swarts										
Grainger Testing:	Fail													
Story point estimate:	3													
Sprint:	CJR Sprint 2													
Rank:	2 j01duw:d													

Description

Where a residential tenancy is created in Salesforce via the GREP integration, I want the tenancy to be linked to associated opportunities and contracts, so that there will be a single view of tenancy within Salesforce.

Process:

- Existing: Any tenancies captured in Qube directly are pushed to Salesforce as an opportunity via the GREP integration.
- New: GREP will also create a new Salesforce tenancy record per: <https://graingerplc.atlassian.net/browse/CJR-55>

Examples:

- Shared ownership

- License with no advance payment

A/C 1 - Update New Tenancies created via GREP Integration & Link to the corresponding Opportunity

WHEN a new record with *record type* 'Residential Tenancy' is inserted into the *Contract* table **by the GREP integration**

AND the *PMS Reference ID* is populated

THEN identify any opportunities with the same *PMS Reference ID* AND *Tenancy ID* is not populated

AND update the **Opportunity** record: *TenancyID* = the newly created residential tenancy.

A/C 2 - Linked Any Contracts to New Tenancies created via GREP Integration

WHEN a new *residential tenancy* record is created via the GREP integration AND successfully linked to an opportunity as per A/C 1

THEN identify any other contract records linked to the same opportunity:

- Where contract *record type* is 'Residential Contract'
- AND *Opportunity* = the residential tenancy's OpportunityID

AND update any/all contract records identified:

- Update *TenancyID* = the newly created residential tenancy's ID

Implementation Approach

- After insert trigger on contract object.

Comments

Comment by [Nikki](#) [06/Mar/25]

According to Deb the opportunity is created in a draft status.

Comment by [Matthew Pitcairn](#) [14/Mar/25]

[Nadia Swarts](#) story is ready for QA testing

Comment by [Elisabeta Mihalache](#) [17/Apr/25]



Tenancy

Susan May

▼ Additional Information

Unit (i)

11, Harley Hse, Brunswick Pl, London NW1 4PR

Current Rent (i)

Security Deposit Amou

Uplift %

Previous Rent (i)

TDS Reference

Break Clause

Live Work Clause

Special Clauses

Special Clause Free Tex

Description

▼ System Information

PMS Reference (i)

103094001002

Record Number

00070944

Record Type

Residential Tenancy

Status

Draft

Tenancy (i)

Created By

GREP Integratio

Last Modified By

GREP Integration User, 17/04/2025, 15:36



Opportunity

GREP-CoA Susie May - 11, Harley Hse, Brunswick Pl, London NW1 4PR

Tenancy Type

New

Household income at least 30x rent

COS Opportunity?

Is Guarantor Required

Agreement Type

Other

Number of occupants

Parent Opportunity Opt out of Green Lease

Tenancy

00070944

Suppress Automated Renewal Chase Emails Processed By GREP PMS Reference

Processed - Current Tenancy

103094001002

Passing Rent Checked In Qube



Passing Rent

Is there an Inventory Clerk

No

Inventory Clerk

18 digit OPP ID

006Pv00000Fsr9xLAB

Created by Current User



Referrer Account



Opportunity

GREP-CoA Susie May - 11, Harley Hse, Brunswick Pl, London NW1 4PR

1 item • Sorted by Created Date • Updated a few seconds ago

<input type="checkbox"/> Record Num...	Record Type	Tenancy Ty...	Agreemen...	Unit	Record St
1 <input type="checkbox"/> 00070944	Residential Tenancy			11, Harley Hse, Brunswick Pl, London NW1 4PR	Current

[View All](#)**Payments (0)****Opportunity Field History (1)**

Date	Field	User	Original Value	New Value
17/04/2025, 15:36	Created.	GREP Integration User		

[View All](#)**Stage History (1)**

Stage	Amount	Probability (%)	Expected Revenue	Close Date	Last Modified By
Closed Won	£0.00	100%		17/04/2025	GREP Integration User

[View All](#)

This test passes, however, the integration creates the tenancy instantaneously so I was unable to capture the PMS reference only before the tenancy was created

Comment by [Helen Douglas-Teggart](#) [29/Apr/25]

Only linking lead tenant on person account.

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings Units Tasks

Person Account
Essyrose Mathew

GREP-CoA Jack Deazley & Essyrose Ben Mathew - 63, A... ▾ RENEWAL- 63 Ancoats- 20/03/2024 ▾

Agreement Type: AST
Agreed Unit: 63, Ancoats, 2 Butler Street, M4 6BZ
Rent: £1,100.00

Agreement Type: AST
Agreed Unit: 63, Ancoats, 2 Butler Street, M4 6BZ
Rent: £1,100.00

[View All](#)

Right to Rents (1)
1 item • Sorted by Date Next RTR Required • Updated a few seconds ago

<input type="checkbox"/> Right to Rent ID	RTR Validity	Status	Time Limited	RTR Expiry	De
1 <input type="checkbox"/> RTR-00022292		Not started	<input type="checkbox"/>		

[View All](#)

Tenancies (0)

Authorisations (2)

Authorisation Number	Status	Payment Route Selected	Last Modified Date
AUTH-000042900	In Force	Direct Debit	25/05/2024, 05:56
AUTH-000042964	Awaiting submission	Direct Debit	13/02/2023, 09:58

[View All](#)

Comment by Jacob Smycz [02/May/25]
Helen Douglas-Teggart as discussed this is not related to this ticket - so just want to check that this ticket should be a pass (it was passed by Elisabeta) as we have ac
Is there anything else we can do here?
cc Sarah Jessiman Mudzunga Khonani Davhana

SVOT - Provide Single View of Tenancy (CJR-392)**[CJR-170] Residential Tenancy & Contract - Related List Buttons** Created: 03/Mar/25 Updated: 14/Apr/25 Resolved: 06/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Provide Single View of Tenancy

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Sub-tasks:	Key	Summary	Type	Status
	CJR-190	QA	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	0.5			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:004			

Description

When viewing a **Residential Tenancy**, the following **related list** buttons should not be visible:

- Contracts > New
- EOT > New
- Opportunities> New, Create License, Create Renewal

Record Type Residential Tenancy	Agreement Type AST	Unit 1005, Halogen House, 217 Chapel St, Salford.	Start Date 01/04/2024	End Date 31/03/2025
------------------------------------	-----------------------	--	--------------------------	------------------------

Details **Related**

Tenancy Contact Roles (0)

Contracts (2)
2 items • Sorted by Record Number • Filtered by Record Type • Updated a few seconds ago

	Record Number ↑	Account Name	Record Type
1	<input type="checkbox"/> 00038307	Nikki Parkinson	Residential Contract
2	<input type="checkbox"/> 00038308	Nikki Parkinson	Residential Contract

[View All](#)

End Of Tenancies (0)

Opportunities (1)
1 item • Updated a few seconds ago

	Opportunity Name	Stage	Close Date
1	<input type="checkbox"/> Nikki Parkinson - New Lease - 1005 Halogen 1/4/2025	Audit	30/04/2025

[View All](#)

When viewing a **Residential Contract**, the following **related list** buttons should not be visible:

- EOT > New

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings Units Tasks

Tenancy
00038307

Agreement Contact Role (0)

Contact Roles for Parent Opportunity (0)

End Of Tenancies (0)

Cases (0)

Tenancy History (6+)

Date	Field	User
03/03/2025, 09:20	Record Status	Helen Douglas-Teggart
03/03/2025, 08:15	Record Status	Open box
03/03/2025, 07:44	Record Status	Helen Douglas-Teggart
03/03/2025, 07:16	Record Status	Open box
03/03/2025, 07:08	Record Status	Helen Douglas-Teggart
28/02/2025, 14:46	Record Status	Open box

[View All](#)

Files (0)

Upload Files

Or drop files

Special Clauses (1)

```
avascriptvoid(0)
```

Lightning App Builder | Pages ▾ | Residential Tenancy Record Page

Fields

(35)

n
auncher
& Recommendations

Trace

Related List - Single

Next Best Action

Predictions

Registration Work Guide

ts Panel

ad

/

Associated Documents

Document

ifications

ems

Contracts (6)
6 items • Updated a few seconds ago

	Record Number	Account Name	Record Type	Record Status
1	Sample Text			Sample Text
2	Sample Text			Sample Text
3	Sample Text			Sample Text
4	Sample Text			Sample Text
5	Sample Text			Sample Text
6	Sample Text			Sample Text

View All

End Of Tenancies (0)

Opportunities (6)
6 items • Updated a few seconds ago

	Opportunity Name	Stage	Close Date
1	Sample Text		Sample Text
2	Sample Text		Sample Text
3	Sample Text		Sample Text
4	Sample Text		Sample Text
5	Sample Text		Sample Text
6	Sample Text		Sample Text

View All

Comments

Comment by Helen Douglas-Teggart [14/Apr/25]

All pass

Grainger PLC Home Leads Accounts Contacts **Tenancies** Opportunities More

Tenancy David Cooke

[Create End of Tenancy](#) [Create Renewal Opportunity](#) [Create Licence Opportunity](#)

Contracts (1)

1 item • Sorted by Record Number • Filtered by Record Type • Updated 3 minutes ago

Record ... ↑ ↓	Tenancy Ty... ↓	Start Date ↓	End Date ↓	Record Sta... ↓	Opportunity ↓	Rent ↓
1 00036816	Renewal	13/06/2024	12/06/2029	Activated	AFF: Renewal 21...	782.12

[View All](#)

End Of Tenancies (0)

[Change Owner](#)

Opportunities (2)

2 items • Updated 3 minutes ago

Opportunity Name ↓	Stage ↓	Tenancy Ty... ↓	Contract St... ↓	Tenancy En... ↓	Rent ↓
1 GREP-CoA David Cooke and...	Closed Won	New	13/06/2018	12/06/2035	£642.34
2 AFF: Renewal 21 Beatty Gard...	Closed Won	Renewal	13/06/2024	12/06/2029	£782.12

[View All](#)

License & Decant Opportunities (1)

1 item • Updated 3 minutes ago

Opportunit... ↓	Stage ↓	Tenancy Type ↓	Contract St... ↓	Tenancy En... ↓	Rent ↓
1 cooke test	Post Viewing	New			£0.00

[View All](#)

Grainger PLC Home Leads Accounts Contacts **Tenancies** Opportunities More

Tenancy 00036816

[Change Record Type](#) [Generate Documents](#) [Declaration](#)

Contact Roles for Parent Opportunity (2)

2 items • Sorted by Primary • Updated a few seconds ago

Contact Name ↓	Active ↓	Role ↓	Email ↓	Relationship ↓
1 David Cooke	<input checked="" type="checkbox"/>	Lead Tenant	david.cooke1988@graingerplc...	
2 Paige Roy	<input checked="" type="checkbox"/>	Tenant	paige.roy666@graingerplc.com	

[View All](#)

End Of Tenancies (0)

[Change Owner](#)

Cases (0)

Tenancy History (3)

Date	Field	User	Original Value	New Value
11/04/2025, 14:15	Record Status	Open box	Draft	Activated
07/04/2025, 14:37	Contract Activated.	Open box		

[\[CJR-169\] Set Previously Signed Agreements to Invalid](#) Created: 03/Mar/25 Updated: 16/Apr/25 Resolved: 20/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Sarah Jessiman
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, UAT, UAT_Feedback		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Issue links:	Relates				
	relates to	SFDC-698	Prevent Agreements from Expiring		Released
	relates to	CJR-44	Activate Contracts on COS & Renewal		Done
Sub-tasks:	Key	Summary	Type	Status	Assignee
	CJR-270	QA	Subtask	Done	
Grainger Testing:	Pass				
Story point estimate:	2				
Sprint:	CJR Sprint 2				
Rank:	2 j01eo:y				

Description

When a new agreement is signed for an opportunity, I want any previously signed agreements to be updated to be 'Invalid', so that there is only one signed agreement for a lease.

A/C 1 - Update Signed Agreements to a new 'Invalid' Agreement Status when another Agreement is subsequently signed

GIVEN an **opportunity** with **Record Type** 'Residential Opportunity' has one or more linked **agreements** in **Agreement Status** 'Signed**'

WHEN another agreement linked to the opportunity is updated to **Agreement Status** 'Signed**'

THEN the previously signed agreements will be updated to a new 'Invalid' **Agreement Status**

AND the **Status** (*echosign_dev1StatusVisible*) will also reflect as 'Invalid'.

Implementation Approach

- Add new Agreement status "Invalid"
- After save record triggered flow on Agreement to update all other signed agreements from same opp to have agreement status = "invalid"

Comments

Comment by Nikki [05/Mar/25]

New Lease Opportunity

GIVEN an Opportunity has (only) one associated Agreement that is:

In a 'Signed' Agreement Status, and

Is linked to a Tenancy with a Tenancy Type 'New'

WHEN the Opportunity's Current Stage is updated to 'Audit'

THEN Tenancy Status & Status are updated to 'Activated'

Activate Contract Records for COS & Renewal Opportunities

GIVEN an **opportunity** has a record type of 'Residential Opportunity'

AND has a **Tenancy Type** of 'Renewal'

AND

- The opportunity has (only) one associated **agreement that is in a 'Signed' Agreement Status**
- OR the opportunity does **not** have any agreements in a 'Signed' **Agreement Status**
AND the opportunity has (only) one associated **agreement in a 'Draft' Agreement Status**

WHEN the opportunity's **Stage** is updated to 'Closed Won'

THEN the contract record linked to the above agreement will be updated:

- **Status** = 'Activated'
- **Tenancy Status** = 'Activated'

Comment by Jessica Howe [15/Apr/25]

this test is completed as part of <https://graingerplc.atlassian.net/browse/CJR-194> - pass Helen Douglas-Teggart

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

↳ [CJR-160] Validate PMS Reference when Opportunity moves to Audit Created: 27/Feb/25 Updated: 14/Apr/25 Resolved: 06/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	Dev_Reviewed, OpenBox, REFINED, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Issue links:	Relates relates to CJR-313 [Not a bug] PMS validation not always... Done			
Sub-tasks:	Key	Summary	Type	Status
	CJR-189	QA	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	0.5			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:002			

Description

GIVEN the *PMS Reference* is not populated on an opportunity

WHEN the user changes the opportunity *Stage* to 'Audit'

THEN new validation will require the *PMS Reference* field to be populated.

Error Message: "Please ensure the PMS Reference field is populated before moving to the Audit stage"

Error Location: Top of Page

IAs:

Create a new validation rule with the appropriate name and suffix

Ensure the validation rule respects the Configuration.Are_Validations_Off__c custom checkbox setting as a bypass

Comments

Comment by [Matthew Pitcairn](#) [05/Mar/25]

[Nikki](#) , added some additional details around the error message and location for this validation — you can thumbs up if you are happy

Comment by [Nikki](#) [05/Mar/25]

[Matthew Pitcairn](#) , I'm not quite sure when to use validations that show on the field & validations that show at the top of the screen. It would make sense to show the e then that is fine.

Comment by [Matthew Pitcairn](#) [05/Mar/25]

[Nikki](#) , what I find is that linking the validation to a field on the layout is only useful if the field is visible to the user when the rule triggers so it has something to highlight rule was checked when saving a record therefore a field is in front of a user and highlighting makes sense.

In the case where it is not, you end up with the below screenshot that is pretty redundant where Salesforce prints the field name in front of the error message – so my

Search...

Grainger PLC

[Home](#)[Leads](#) ▾[Accounts](#) ▾[Contacts](#) ▾[Opps](#)

 You encountered some errors when trying to save this record
PMS Reference: Please ensure the PMS Reference field is populated before n

 Opportunity
Test Renewal

Account Name Test 1	Move-In Date 02/03/2025	Tenancy End Date 01/03/2028	Agreed Terms 24 Months	Agreed Unit Flat 7, Crofton Mansion, Liverpool, L17	Rent £30.00
--	----------------------------	--------------------------------	---------------------------	--	----------------


 Offers (1)

1 item • Sorted by Offer Name • Updated 2 minutes ago

<input type="checkbox"/> Offer Number	Offer Name ↑	Status	Rent	Unit
1 <input type="checkbox"/> 00087473	Flat 7, Crofton Mansion, Liverpool, L17 - 24 Months	Accepted	£30.00	Flat 7, Crof

[View All](#)
 Agreements (1)

1 item • Sorted by Agreement Name • Updated 2 minutes ago

<input type="checkbox"/> Agreement Name ↑	Contract	Document Type	Agreement Status
1 <input type="checkbox"/> Adobe Sign Agreement	00044135		Draft

[View All](#)**Details**[Related](#)

Opportunity Name
[Test Renewal](#)

Opportunity Owner
 [John Doe](#)

Comment by [Helen Douglas-Teggart](#) [14/Apr/25]

Pass

Comment by [Helen Douglas-Teggart](#) [14/Apr/25]

Sandbox: UAT | [Log out](#)

Grainger PLC Home  More 

Opportunity **Test Gemma Rogers Renewal**      

Account Name: **Gemma Rodgers** Contract Start Date: **15/04/2025** Tenancy End Date: **15/04/2028** Agreed Terms: **36 Months** Agreed Unit: **Villa 10, Lakeside Rise, Manchester, M9**

Mark as Current Stage

Offers (1)  

1 item • Sorted by Offer Number • Updated a few seconds ago

<input type="checkbox"/>	Offer Number ↑	Offer Name	Status	Rent
1	<input type="checkbox"/> 00085524	Villa 10, Lakeside Rise, Manchester, M9 - 36 Months	Draft	£0.00

[View All](#)

Agreements (0)  

SVOT - Create Tenancies in Salesforce that Map to Qube (CIR-389)

[CJR-159] Contract/Tenancy Start Date, End Date & Term Created: 27/Feb/25 Updated: 29/Apr/25 Resolved: 11/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	Integrations, OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:	
Issue links:	Blocks blocks GJR-55 Create/Update Tenancy from Qube [Gra... Done blocks GJR-143 Update Contract / Tenancy Related Lists Done is blocked by GJR-129 Users can see Qube Tenancy Details Done Cloners is cloned by GJR-237 Update Tenancy End Date on Renewal/COS Done

	Relates						
	relates to	CJR-64	Automatically Create New Tenancy Rev...		Done		
	relates to	CJR-509	Not a bug - Residential Tenancy being...		Done		
	relates to	CJR-46	Create/Update Tenancies		Done		
Sub-tasks:		Key	Summary	Type	Status		
		CJR-209	QA	Subtask	Done		
				Mudzunga Khonani Davhana			
Grainger Testing:		Pass					
Sprint:		CJR Sprint 2					
Rank:		2 j012pb:0002					

DescriptionA/C 1 - Add a New 'Tenancy End Date' Field

Create a new field on the contract object: **Tenancy End Date**

- Optional, date field
- Help text: Updated from Qube
- The field should not be editable by users.
 - FLS: Visible to General Contract R/O ; editable: GREP Integration (ask Jacob)

A/C 2 - Display 'Tenancy End Date' on the Residential Tenancy

On the **Residential Tenancy** page layout (and compact layout):

- Replace the "End Date" field with "Tenancy End Date".

A/C 3 - Set End Date for Contracts [Existing Functionality]

WHEN a new contract record is created with *Residential Contract* or *Commercial Contract* record type

THEN the contract *Start Date* and *Contract Terms (months)* will be updated per the opportunity

AND the contract *End Date* will be calculated as: *Start Date + Contract Term (Months)*

A/C 4 - Set Tenancy End Date for New Tenancy

WHEN a new contract record is created with *Residential Tenancy* record type

THEN the *Start Date* will be populated from the activated Residential Contract's *Start Date*

AND the *Tenancy End Date* will be populated from the activated Residential Contract's *End Date*.

A/C 5 - Updating a Tenancy

WHEN a *Residential Tenancy* contract record is updated on the activation of a renewal contract

THEN neither the *Start Date* or *Tenancy End Date* will be updated.

Field	Field Type	New Commercial Contract is Created [Existing]	New Residential Contract is Created [Existing]	New Residential Tenancy is Created	Residential Tenancy is Updated on Activation of Renewal Contract	Residential Tenancy is Updated by GREP
Start Date	Date	Opportunity Move-In Date	Opportunity Move-In Date	New Contract Start Date	No Change	No Change
Contract Term (Months)	Integer	Derived from Opportunity Agreed Terms; e.g."3 Years" = 36	Opportunity Agreed Terms	n/a	n/a	n/a
End Date	Date	Opportunity Tenancy End Date	= Start Date + Contract Term (Months)	n/a	n/a	n/a
Tenancy End Date	Date	n/a	n/a	Contract End Date	No Change	Qube Tenancy End Date
Contract Term (Years)	Formula	= Contract Term (Months) / 12	n/a	n/a	n/a	n/a
Tenancy Term (Months)	Formula	n/a	n/a	= Number of months from [Start Date] to later of [End Date or Today]	= Number of months from [Start Date] to later of [End Date or Today]	= Number of months from [Start Date] to later of [End Date or Today]

Implementation Approach

APEX trigger or flow in system context

Comments

Comment by [Nikki](#) [27/Feb/25]

Anjali Salecha Mudzunga Khonani Davhana , as discussed.

Comment by [Anjali Salecha](#) [03/Mar/25]

Hi Nikki , we will need to disable the setting "Auto Calculation of Contract End Date". It will be applicable for all contract types. This is the only way to be able to specify cc - Sam Duncan

Comment by [Nikki](#) [03/Mar/25]

Hi [Anjali Salecha](#) Shall we discuss with [Sam Duncan](#) in refinement tomorrow before making any changes?

Comment by [Sam Duncan](#) [03/Mar/25]

yes, let's discuss [Nikki Anjali Salecha](#)

Comment by [Nikki](#) [04/Mar/25]

[Anjali Salecha](#) I have updated the A/Cs

Comment by [Helen Douglas-Teggart](#) [14/Apr/25]

A/C1 - working. editable but I don't have permission to edit.

Sandbox: UAT | [Log out](#)

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities

Tenancy [Create End of Tenancy](#) [Create Renewal](#)

Anthony Currie

Actual Move Out Date [Calendar icon](#)

Memorandum of Date

Arrears [Info icon](#)

GPLC Notice Init

Additional Information

Unit [Info icon](#) 619, Brook Place Apts

Uplift % 4.00%

Previous Rent [Info icon](#)

Break Clause 2 at 4 to expire at 6

We hit a snag.

Review the errors on this page.

- Oops...you don't have the necessary privileges to edit this record. See your administrator for help.

[Cancel](#) [Save](#)

Phone

AC2 - pass



Search...



Tenancy

Anthony Currie

Create End of Tenancy

Create Renewal

Account Name	Anthony Currie		
Tenancy Length (Months)	12		Document Type
Start Date	28/05/2024		Memorandum of Date
Latest Contract Start Date			Arrears
Tenancy End Date	27/05/2025		GPLC Notice Initiation
Actual Move Out Date			

Additional Information

Unit	619, Brook Place Apts, Sheffield, S11 8DA		Current Rent
Uplift %	4.00%		Security Deposit
Previous Rent			TDS Reference
Break Clause	2 at 4 to expire at 6		Live Work Clause
Special Clauses			Special Clause Frequency

Comment by Helen Douglas-Teggart [14/Apr/25]

AC3 and 4 - not happening automatically

Tenancy Owner  Helen Douglas-Teggart Record Status

Agreement Type 

Opportunity **Ginger Rogers-** Related Opportunities

Right to Rents

- Right to... ▼
- RTR-00022351

Feedback (0)

Contracts (0)

Payments (0)

Tenancy Details

* Account Name 

Tenancy Length (Months) This field is calculated upon save

Start Date **We hit a snag.**

Latest Contract Start Date

Tenancy End Date

Actual Move Out Date

Review the errors on this page.

- dlrsls_ContractTrigger: execution of AfterInsert caused by: System.DmlException: Update failed. First exception on row 0 with id 006Pv00000Fp2NNIAZ; first error: FIELD_CUSTOM_VALIDATION_EXCEPTION, Please ensure 'Tenancy End Date' is populated on the related Live Unit Tenancy record: [] (dlrsls_ContractTrigger: line 7, column 1)

 Cancel  Save & New 

Comment by Sarah Jessiman [15/Apr/25]

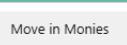
Helen Douglas-Teggart

AC 3 - This issue could be happening because the contract was not created via the "Create Contract" button, hence the fields were not auto populating

Logged in as Helen Douglas-Teggart (hteggart@graingerplc.co.uk.uat) | Sandbox: UAT | Log out as Helen Douglas-Teggart

Opportunity **Test Opp** Create I

Account Name Strawberry Shortcake	Contract Start Date 01/05/2025	Tenancy End Date 30/04/2027	Agreed Terms 24 Months	Agreed Unit 140a, Tanfield Avenue, Neasden, London	Rent £0.00
--------------------------------------	-----------------------------------	--------------------------------	---------------------------	---	---------------

 On Referring  Signing

Tenancy **00062168**

Record Type Residential Contract	Agreement Type AST	Opportunity Test Opp	Unit 140a, Tanfield Avenue, Neasden, London	Start Date 01/05/2025	End Date 30/04/2027
-------------------------------------	-----------------------	-------------------------	--	--------------------------	------------------------

Details Related

Details

Tenancy Owner  Helen Douglas-Teggart	Tenancy Type New
Account Name Strawberry Shortcake	Agreement Type AST
Record Status Activated	Document Type
Contract Term (months) 24	Memorandum of Agreement Date
Start Date 01/05/2025	Tenancy  00062169
End Date 30/04/2027	Opportunity Test Opp
Actual Move Out Date	

AC 4 - When it comes to creating the *Residential Tenancy* we also need to ensure the correct process is followed upon creation. The agreement needs to be added and then trigger the auto population of those tenancy fields

Strawberry Shortcake

Record Type Residential Tenancy	Agreement Type AST	Unit 140a, Tanfield Avenue, Neasden, London	Start Date 01/05/2025	Tenancy End Date 30/04/2027	Create End of Tenancy	Create Rel.
------------------------------------	-----------------------	--	--------------------------	--------------------------------	---------------------------------------	-----------------------------

Details [Related](#) [Tenants](#)

Tenancy Overview

- > **Residential Tenancy Strawberry Shortcake
Current AST 140a, Tanfield Avenue, Neasden, London

▼ Details

Tenancy Owner Helen Douglas-Teggart	Record Status Current
Account Name Strawberry Shortcake	Agreement Type AST
Tenancy Length (Months) 24	Document Type
Start Date 01/05/2025	Memorandum of Agreement Date
Latest Contract Start Date 1	Arrears 1
Tenancy End Date 30/04/2027	GPLC Notice Initiated
Actual Move Out Date	

<https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Opportunity/006Pv00000FqDTaIAN/view>

Please feel free to reach out to myself or Jacob if you need clarification on anything above.

Comment by [Helen Douglas-Teggart](#) [23/Apr/25]

3 and 4 now working fine- thanks [Sarah Jessiman Jacob Smycz](#)

Comment by [Helen Douglas-Teggart](#) [23/Apr/25]

AC 5 - fail - tenancy end date changing [Sarah Jessiman Jacob Smycz](#)

Ksenia Kovalenko

Record Type Residential Tenancy	Agreement Type AST	Unit 507, Solstice Apts, Silbury Boulevard	Start Date 07/10/2022	Tenancy End Date 22/04/2026	
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Details [Related](#) [Tenants](#)

Tenancy Overview

- > **Residential Tenancy Ksenia Kovalenko
Current AST 507, Solstice Apts, Silbury Boulevard

▼ Details

Tenancy Owner Sarah Nolan	Record Status Current
Account Name Ksenia Kovalenko	Agreement Type AST
Tenancy Length (Months) 43	Document Type
Start Date 07/10/2022	Memorandum of Agreement Date
Latest Contract Start Date 1	Arrears 1
Tenancy End Date 22/04/2026	GPLC Notice Initiated
Actual Move Out Date	

▼ Additional Information

Unit 507, Solstice Apts, Silbury Boulevard	Current Rent 1
Uplift % 4.00%	Security Deposit Amount £1,220.00
Previous Rent 1	TDS Reference
Break Clause	Live Work Clause

Tenancy
Ksenia Kovalenko

Record Type Residential Tenancy	Agreement Type AST	Unit 507, Solstice Apts, Silbury Boulevard	Start Date 07/10/2022	Tenancy End Date 06/10/2024
------------------------------------	-----------------------	---	--------------------------	--------------------------------

Details Related Tenants

Tenancy Overview

- Residential Tenancy Ksenia Kovalenko
Current AST 507, Solstice Apts, Silbury Boulevard

Details

Tenancy Owner  Sarah Nolan	Record Status Current
Account Name Ksenia Kovalenko	Agreement Type AST
Tenancy Length (Months) 31	Document Type AST
Start Date 07/10/2022	Memorandum of Agreement
Latest Contract Start Date	Arrears
Tenancy End Date 06/10/2024	GPLC Notice Initiated
Actual Move Out Date	

Additional Information

Unit 507, Solstice Apts, Silbury Boulevard	Current Rent
Uplift % 6.00%	Security Deposit Amount £1,220.00
Previous Rent	TDS Reference

Comment by Jacob Smycz [28/Apr/25]
Helen Douglas-Teggart as mentioned on <https://graingerplc.atlassian.net/browse/CJR-509> AC 5 has been considered in <https://graingerplc.atlassian.net/browse/CJR-2>

Comment by Helen Douglas-Teggart [29/Apr/25]
Jacob Smycz Thank you

SVOT - Import Current & Passing Rent from Qube (CJR-345)

[\[CJR-152\] Contract & Tenancy Page Layout](#) Created: 26/Feb/25 Updated: 14/Apr/25 Resolved: 19/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Import Current & Passing Rent from Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Sarah Jessiman
Resolution:	Done	Votes:	0
Labels:	IA_Done, OpenBox, REFINED, Show_Me_Complete, UAT, UAT_Feedback		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:							
Issue links:	Blocks	is blocked by	CJR-254	Unable To Edit New Fields on Resident...	Cloners	Done	

	is cloned by	CJR-236	Tenancy Page Layout	Done
	Relates			
	relates to	CJR-156	Feature: Manage Eviction Initiated Fl...	Done
Sub-tasks:	Key	Summary	Type	Status
	CJR-245	QA	Subtask	Done
	CJR-249	QA2	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	2			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:0a			

Description**A/C 0 - Update Permission Set Access to TDS Reference Field**

1. Ensure that the following permissions are granted to the listed Permission Sets:

- Read - PS_GEN_Contracts_Read
- Read and Edit - PS_Tenancy_Progression CRUD

A/C 1 - Update Contract Page Layout for 'Residential Tenancy' Record Type

1. Delete the "Renewal Denied" field. [Demo Feedback]
2. Add a new field (checkbox) "GPLC Notice Initiated" and display in details section. [Demo Feedback]
3. Remove *Landlord Break* and *Tenant Break* fields. [Demo Feedback]
4. Display the *TDS Reference* field.
5. Display *Tenancy* in the *System Information* section.
6. *Memorandum of Agreement Date*: Display all the time; not conditionally [MP: was previously not on the page at all --- have added]
7. Update the page layout for the first 2 sections to align with contract layout:

Residential Tenancy	
Details	
Tenancy Owner	Agreement Type
Account Name	Document Type
Record Status	Memorandum of Agreement Date
Tenancy Term (Months)	Latest Contract Term (Months)
Start Date	Latest Contract Start Date
Tenancy End Date	Arrears
Actual Move Out Date	GPLC Notice Initiated
Additional Information	
Unit	Current Rent
Uplift %	Security Deposit Amount
Passing Rent	TDS Reference
Break Clause	Live Work Clause
Special Clauses	Special Clause Free Text
First Break Clause Date	Break Clause Notice (Months)
Description	

A/C 2 - Update Contract Page Layout for 'Residential Contract' Record Type

1. Remove the *TDS Reference* field.
2. Update the page layout for the first 2 sections to align with tenancy layout:

Residential Contract	
Details	
Tenancy Owner	Tenancy Type
Account Name	Agreement Type
Record Status	Document Type
Contract Term (months)	Memorandum of Agreement Date
Start Date	Tenancy
End Date	Opportunity
Actual Move Out Date	
Additional Information	
Unit	Rent
Uplift %	Security Deposit Amount
Break Clause	Live Work Clause
Tenant Break	Landlord Break
Special Clauses	Special Clause Free Text
Description	

A/C 3 - Update Contract Page Layout for 'Commercial Contract' Record Type

1. Ensure the *TDS Reference* field is not visible.

Opportunity	Account Name	Agreement Type	Unit	Tenancy Start Date	Tenancy End Date
Jessu arm-	Jessu arm	Occupation Contract	1011, 5 Capital Quarter, Tyndall St., Cardiff	10/02/2025	09/05/2025

Details		Related	
Tenancy Owner	Saji Gunasekaran	Tenancy Type	MTC (Mid-Term Change)
Tenancy Number	00038663	Agreement Type	Occupation Contract
Opportunity	Jessu arm-	Document Type	Occupation Contract
Account Name	Jessu arm	Memorandum of Agreement Date	
Tenancy Status	Draft	Tenancy Term (months)	3
TDS Reference		Actual Move Out Date	
		Tenancy Start Date	10/02/2025
		Tenancy End Date	09/05/2025

Implementation Approach

- Update lightning record page / dynamic forms as per AC's
 - Create new field "GPLC Notice Initiated"
 - Checkbox
 - FLS: Editable by **PS_Operations CRUD** permission sets
 - FLS: Viewable by **PS GEN Contracts Read, PS System Support User Permissions** permission sets

Comments

Comment by Jacob Smycz [13/Mar/25]

Nikki to confirm the 'GPLC Notice Initiated' field is to be checked if Grainger have served Section 8 on the tenants only?

Comment by Nikki [13/Mar/25]

Jacob Smycz , Yes or have at least decided to serve the S8.

Comment by Jacob Smycz [13/Mar/25]

Update IAs with Perm Sets Sam Duncan Nikki

Comment by Matthew Pitcairn [17/Mar/25]

Sam Duncan Nikki The Renewal Denied field is referenced in a number of flows (and/or flow versions) when they manually insert a tenancy, do you think it is worth the

Unable to Complete the Requested Change

Your changes could not be completed for the following reasons:

Comment by Matthew Pitcairn [19/Mar/25]

Jacob Smycz Sam Duncan if we give the PS_System_Support_User_Permissions PS read access to the 'GPLC Notice Initiated' field, it also has edit access as th

Comment by Jacob Smycz [19/Mar/25]

Matthew Pitcairn yes thats fine, the SysSupport users are essentially Admins (without the ability to edit/setup users) so should be able to view/edit these fields.

Comment by Helen Douglas-Teggart [14/Apr/25]

All Pass

**Tenancy
00038887**

Record Type Commercial Contract	Agreement Type Commercial License	Account Name Smile2Impress Clinics Ltd	Unit Car Space 5 (RHS) Grove House, Tudor Grove	Start Date 08/03/2025
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Details Related

▼ Details

Tenancy Owner	Deborah Stein	Start Date	08/03/2025
Opportunity	GREP-CoA BLS International Services (UK) Ltd - Car Space 5 (RHS) Grove House, Tudor Grove	End Date	07/03/2027
Account Name	Smile2Impress Clinics Ltd	Actual Move Out Date	
Unit	Car Space 5 (RHS) Grove House, Tudor Grove	Rent	1,600.00
Record Status	Activated	Break Clause	No Break
Tenancy Type	New		
Agreement Type	Commercial License		
Contract Term (months)	24		

▼ Rent Review

▼ Additional Information

Description	Car Space 5 (RHS) Grove House, Tudor Grove
-------------	--

Eloise Jephson

[Create End of Tenancy](#) | [Create Renewal Opportunity](#) | [Create Licence Opportunity](#) | ▾

Details Related Tenants

Tenancy Overview

**Residential Tenancy Eloise Jephson
Current Live Work Flat 2 Grove House, 11-20 Tudor Grove, Londo

▼ Details

Tenancy Owner	Jemma Herring	Record Status	Current
Account Name	Eloise Jephson	Agreement Type	Live Work
Tenancy Length (Months)	47	Document Type	Live Work Agreement;Simple Declaration
Start Date	01/07/2021	Memorandum of Agreement Date	
Latest Contract Start Date		Arrears	
Tenancy End Date	24/05/2025	GPLC Notice Initiated	
Actual Move Out Date			

▼ Additional Information

Unit	Flat 2 Grove House, 11-20 Tudor Grove, Londo	Current Rent	£2,821.15
Uplift %	4.00%	Security Deposit Amount	

Details Related

▼ Details

Tenancy Owner	Jemma Herring		Tenancy Type	Renewal	
Account Name	Eloise Jephson		Agreement Type	Live Work	
Record Status	Activated		Document Type	Live Work Agreement:Simple Declaration	
Contract Term (months)	12		Memorandum of Agreement Date		
Start Date	25/05/2024		Tenancy	00049082	
End Date	24/05/2025		Opportunity	RENEWAL - Flat 2 Grove House - 25.05.2024	
Actual Move Out Date					

▼ Additional Information

Unit	Flat 2 Grove House, 11-20 Tudor Grove, Londo		Rent	3,000.00	
Uplift %	4.00%		Security Deposit Amount	£2,821.15	
Break Clause	Live Work		Live Work Clause	The parties agree that either party has the right to terminate the Tenancy after the first SIX (6) months by giving the other party not less than TWO (2) months PRIOR notice in writing. For the avoidance of doubt between the parties it is agreed that the notice period cannot expire any earlier than 6 months from the start date of the Lease as detailed	
Tenant Break					
Special Clauses					
Description					

SVOT - Provide Single View of Tenancy (CJR-392)

↳ [CJR-148] Create Decant or License Tenancy Linked to the Originating Tenancy Created: 25/Feb/25 Updated: 16/Apr/25 Resolved: 20/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Provide Single View of Tenancy

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Issue links:				
is blocked by	CJR-122	Create a Tenancy for a Decant Agreement	Done	
is blocked by	CJR-123	Create a New License from an Opportun...	Done	
Relates				
relates to	CJR-247	Error when Creating Contract on Licens...	Done	
Sub-tasks:	Key	Summary	Type	Status
	CJR-224	QA2	Subtask	Done
Grainger Testing:	Nadia Swarts			
Story point estimate:	3			
Sprint:	CJR Sprint 2			

Rank:	2 012pb:00f
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Description

A/C 1 - Create Decant or License Tenancy Linked to the Originating Tenancy.

Updates to functionality implemented in <https://graingerplc.atlassian.net/browse/CJR-46> :

A/C 1 - Create a Tenancy when a Contract for a New Lease is Activated

GIVEN a contract has a Record Type of 'Residential Contract'

AND the Tenancy Type is 'New'

AND the Agreement Type is not 'Decant Agreement Normal' or 'Decant Agreement Wales'

WHEN the Record Status changes to 'Activated'

THEN a new tenancy record will be created with identical details and a Record Type of 'Residential Tenancy'

AND the Tenancy field on the activated contract will be updated with the new tenancy record's ID

AND the Tenancy field on the linked opportunity will be updated with the new tenancy record's ID

AND the PMS Reference on the new tenancy record will be populated with the PMS Reference on the linked opportunity

AND the the Tenancy field on the new tenancy record will be populated:

- If the linked opportunity's Originating Tenancy is populated => Use that tenancy ID
- If the linked opportunity's Originating Tenancy is null AND the linked opportunity's Parent Opportunity is populated => Use the Parent Opportunity's Tenancy ID (if any)
- Otherwise: Null

A/C 2 - Link Other Draft Contracts to the Tenancy [no change]

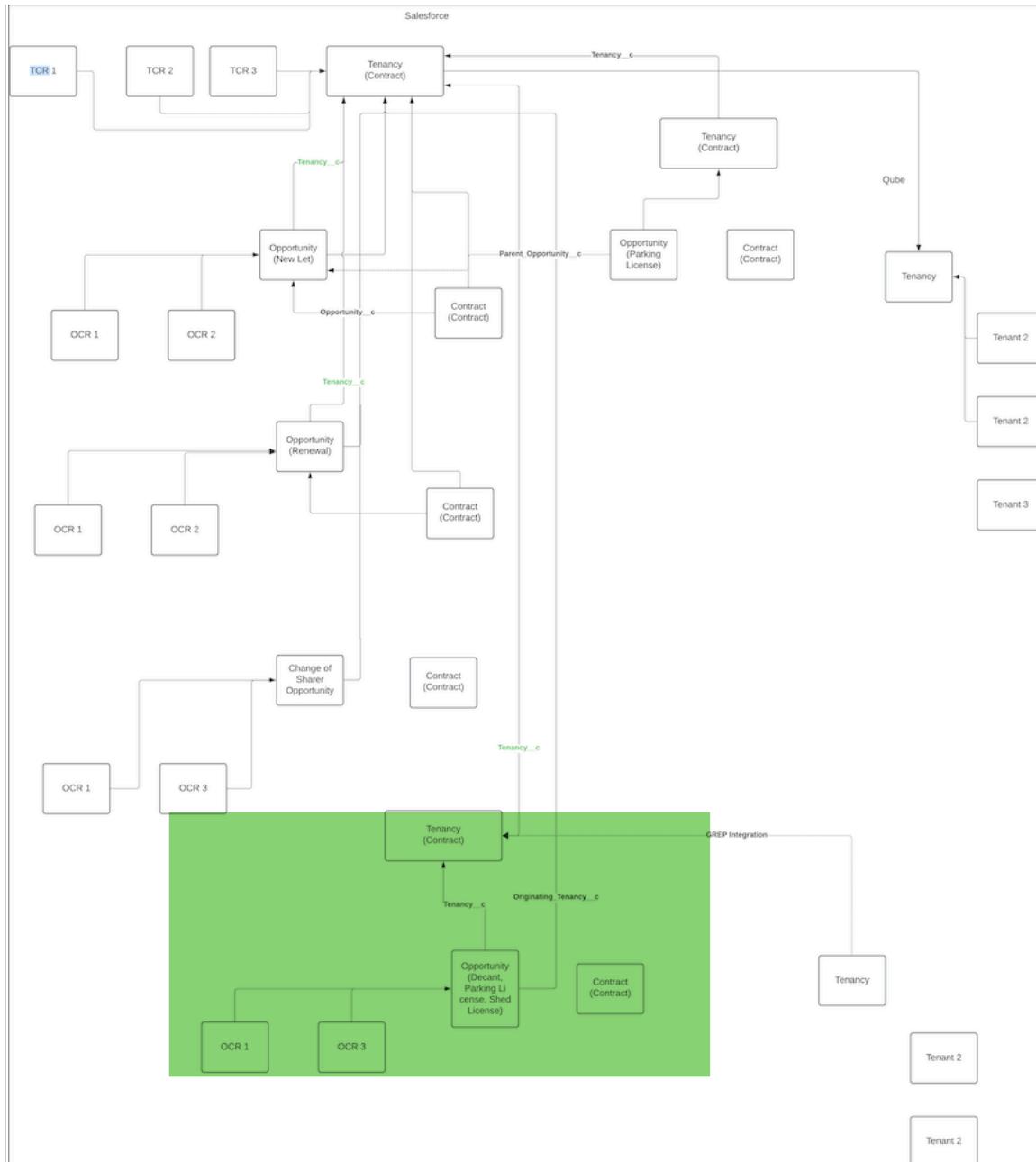
GIVEN the contract in A/C1 has a Record Type of 'Residential Contract'

AND the linked opportunity has multiple agreement records

AND those agreement records are not all linked to the same tenancy/contract [see example below]

WHEN the residential contract is activated in A/C1

THEN the other tenancy/contract records linked to the opportunity via an agreement will also be updated: Their Tenancy field will be updated with the new residential tenancy record's ID.



Test for:

- Decant agreement opportunity
- License opportunity created from a unit opportunity
- License opportunity created from a tenancy

Comments

Comment by Helen Douglas-Teggart [16/Apr/25]

1+ 2 - Pass

Record Type: Residential Tenancy | Agreement Type: AST | Unit: 45, Ancoats, 2 Butler Street, M4 6BZ | Start Date: 11/07/2022 | Tenancy End Date: 09/07/2024

Details	Related	Tenants			
Contracts (5) 5 Items • Sorted by Record Number • Filtered by Record Type • Updated 3 minutes ago					
Record Number	Tenancy Type	Start Date	End Date	Record Status	Opportunity
1 00016368	New	11/07/2022	10/07/2023	Ended	GREP-CoA Holly Whittaker & Lucia Milone - 45, Ancoats, 2 Butler Street, M4 6BZ
2 00026203	Renewal	10/07/2023	09/07/2024	Activated	RENEWAL - 45, Ancoats - 10/07/2023
3 00070934	Renewal	11/07/2024	10/07/2025	Draft	45 Ancoats test
4 00070935	Renewal	11/07/2024	10/07/2025	Draft	45 Ancoats test
5 00070936	Renewal	16/04/2025	15/04/2026	Draft	45 Ancoats test

End Of Tenancies (0)

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

↳ [CJR-147] Create EOT for a Decant Agreement Created: 25/Feb/25 Updated: 17/Apr/25 Resolved: 13/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Issue links:	Relates			
	relates to	CJR-192	"Create End of Tenancy" Button is no...	
Sub-tasks:	Key	Summary	Type	Status
	CJR-191	QA	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	1			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:00004			

Description

A/C 1 - Initiate EOT from a Decant Tenancy [Check existing functionality <https://graingerplc.atlassian.net/browse/CJR-43>]

GIVEN a contract record has a *record type* 'Residential Tenancy'

AND *Tenancy Status* is 'Activated'

AND has any *Agreement Type* including 'Decant Agreement Normal' or 'Decant Agreement Wales'

WHEN a user views the tenancy details screen

THEN a 'Create End of Tenancy' button will be available.

A/C 2 - End the Decant Contract from EOT Check Out: *Updates* to existing logic implemented in <https://graingerplc.atlassian.net/browse/CJR-43>] A/C 3

GIVEN a contract record has a *record type* of 'Residential Tenancy'

AND has a child *contract* record with *Tenancy Status* is 'Activated'

AND the child contract's Agreement Type is not 'Decant Agreement Normal' or 'Decant Agreement Wales'

WHEN the *Actual Move Out Date* is populated on the **tenancy** record

- Either edited directly on the tenancy details screen, or
- Populated via the EOT process

THEN the **child contract** will be updated:

- *Actual Move Out Date* = tenancy's *Actual Move Out Date*
- *Tenancy Status* = 'Ended'

Comments

Comment by [Elisabeta Mihalache](#) [17/Apr/25]

Sandbox UAT | Log Out

Tenancy Justin Bieber

Record Type: Residential Tenancy Agreement Type: Decant Agreement Normal Unit: Apt 113, Abberville Apts, 37 London Rd, Barkin Start Date: 11/04/2025 Tenancy End Date: 10/06/2025

Details Related Tenants

Tenancy Overview

Residential Tenancy Justin Bieber Current Decant Agreement Normal Apt 113, Abberville Apts, 37 London Rd, Barkin

Details

Tenancy Owner: Jessica Herring Account Name: Justin Bieber Tenancy Length (Months): 2 Start Date: 11/04/2025 Letted Contract Start Date: 11/04/2025 Tenancy End Date: 10/06/2025 Actual Notice Out Date: 17/04/2025

Record Status: Current Agreement Type: Decant Agreement Normal Document Type: Memorandum of Agreement Date: 11/04/2025 Amount: 0 GPO Notice Initiated:

Additional Information

Unit: Apt 113, Abberville Apts, 37 London Rd, Barkin Upfront Rent: 4.00% Previous Rent: Break Cause: No Break Special Causes: Description:

Current Rent: Security Deposit Amount: £0.00 TDS Reference: Live Work Causes: Special Causes Free Text:

System Information

PMS Reference: 1234567890 Record Number: 00055389 Record Type: Residential Tenancy Status: Activated

Sandbox UAT | Log Out

Tenancy EOFT - Apt 113, Abberville Apts, 37 London Rd, Barkin

Current Phase Complete

Details Related

Information

End of Tenancy Name: EOFT - Apt 113, Abberville Apts, 37 London Rd, Barkin End of Tenancy Number: 887-07890 Tenant: 20005229 Status: Complete End of Tenancy Reason: Straight Lease NTO

Important Dates

Start Date:	11/04/2025	Notice to Quit Date:	21/04/2025
End Date:	10/06/2025	Future Vacant Date:	15/06/2025
Notices in Place:	0	Future Vacant Date Confirmed:	<input checked="" type="checkbox"/>
Notices in Place Confirmed:	<input checked="" type="checkbox"/>	Actual Vacant Date:	11/06/2025
Contract Start Date:	11/04/2025	Conversion Date:	11/04/2025
Contract End Date:	11/06/2025	Handover in Date:	11/06/2025
Move In Date:	11/04/2025	Move Out Date:	18/04/2025
Available Date:	18/04/2025		

Additional Details

Identical Renting Term: £1200 Reasons for Vacancy: Tenant Deceased End of Tenancy Reason Type: Clear Only Deposit Deduction Type: No Deductions Deposit Deduction Amount: £0.00 Deposit Return Date: 11/06/2025

Outstanding Tasks

Search: Post: Share on update: Search my feed: Collaborate here:  Here's where you start talking with your colleagues about this record.

Sandbox UAT | Log Out

Tenancy Justin Bieber

Record Type: Residential Tenancy Agreement Type: Decant Agreement Normal Unit: Apt 113, Abberville Apts, 37 London Rd, Barkin Start Date: 11/04/2025 Tenancy End Date: 10/06/2025

Details Related Tenants

Contracts (1)

1 item filtered by record type - Updated a few seconds ago

Record Number	Tenancy Type	Start Date	End Date	Record Status	Opportunity	Rent	Upfront %
00055322	Hire	11/04/2025	10/06/2025	Ended	2025-CJA-Justin Bieber - Apt 113, Abberville Apts, 37 London Rd, Barkin	£0.00	4.00%

View All

End of Tenancies (1)

1 item - Updated a few seconds ago

End of Tenancy Number	EOFT
887-07890	<input checked="" type="checkbox"/>

Opportunities (0)

0 items - Updated a few seconds ago

Opportunity Name	Stage	Tenancy Type	Contract Start Date	Tenancy End Date	Rent
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Tenancy History (5)

Date	Field	User	Original Value	New Value
11/04/2025, 12:48	Actual Notice Out Date	Elisabeth Mihaische	17/04/2025	
11/04/2025, 10:38	Current Archived	GSEF Integration User		
11/04/2025, 10:38	Status	GSEF Integration User	Draft	Activated
11/04/2025, 10:38	Record Status	GSEF Integration User	Draft	Current
11/04/2025, 10:32	Created	Elisabeth Mihaische		

Files (0)

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

↳ [CJR-146] Include Decant Tenancies & New Fields in the Data Extracts Created: 25/Feb/25 Updated: 16/Apr/25 Resolved: 17/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None

Affects versions:	None		
Fix versions:	Sprint 2		
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube		

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Sarah Jessiman
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Issue links:	Blocks	CJR-239	User Unable to Access Report	Done
	is blocked by			
	Relates	CJR-50	Data Extracts - Identify Tenancy Data...	Done
Sub-tasks:	Key	Summary	Type	Status
	CJR-238	QA	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	1			
Sprint:	CJR Sprint 2			
Rank:	2 012pb:000009			

Description

A/C - Updates to existing reports implemented in <https://graingerplc.atlassian.net/browse/CJR-50>

Report 1 - Residential Tenancies not linked to an Account and/or with no Active Child Contracts

Report Name: Active Tenancies with no Active Contract

Create a report of each *Contract* record that meets all of the following criteria:

- Record type = 'Residential Tenancy'
- Record Status** = Activated
- The record has **no child records** that meet the all of following criteria:
 - Record Status** = Activated
 - Agreement Type** is not 'Deeant Agreement Normal' or 'Deeant Agreement Wales'

The list of *Contract* records should include the following fields:

- Record** number
- Record Type
- PMS Reference Id
- Account Name
- Unit
- Opportunity
- Tenancy Type
- Agreement Type
- Start Date
- Latest Contract Start Date**
- Tenancy Term (months)**
- Tenancy End Date - new field added in <https://graingerplc.atlassian.net/browse/CJR-159>
- Actual Move Out Date
- Record Status**
- Description
- Record Owner**

Extract 2 - Identify Active Contracts with Future End Date & No Associated Tenancy

Report Name: Active Contracts not linked to a Tenancy

Create a report of each *Contract* record that meets all of the following criteria:

- Record type = 'Residential Contract'
- Tenancy** is not populated
- Record Status** = Activated
- Tenancy End Date** > [today]
- Actual Move Out Date is not populated
- Agreement Type** is not 'Deeant Agreement Normal' or 'Deeant Agreement Wales'

The list of *Contract* records should include the following fields:

- Record** number
- PMS Reference Id
- Account Name

- Unit
- Opportunity
- Tenancy Type
- Agreement Type
- Start Date
- **Contract** Term (months)
- End Date
- Actual Move Out Date
- Record Type
- **Record** Status
- **Description**
- **Record Owner**

Extract 3 - Identify Residential Units with no associated Tenancy

Report Name: Residential Units with no active Tenancy

Create a list of *Unit* records that meet all of the following criteria:

- Unit record type is not 'Commercial Unit'
- The unit is **not** linked to a *Contract* record:
 - with Record Type 'Residential Tenancy' [Contract.Unit__c]
 - **AND Record Status = Activated**

The list of *Unit* records should include the following fields:

- Plot No.
- Building
- Block
- Estate
- Unit Status
- MRI Unit Status
- Property Type
- Record Type

Comments

Comment by Nikki [04/Mar/25]

Mudzunga Khonani Davhana This story has the full report requirements. I added report names; let me know if they are still too long.

Comment by Helen Douglas-Teggart [16/Apr/25]

All pass -

[Active Tenancies with no Active Contract | Salesforce|https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Report/00OPv000005jPgMAE/view?queryScope=userFolders]

[Active Contracts not linked to a Tenancy | Salesforce|https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Report/00OPv000005VkgbMAK/view?queryScope=userFolders]

[Residential Units with no active Tenancy | Salesforce|https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Report/00OPv000005VkgdMAK/view?queryScope=userFolders]

SVOT - Provide Single View of Tenancy (CJR-392)

↳ [CJR-145] [View Tenancy Hierarchy](#) Created: 25/Feb/25 Updated: 14/Apr/25 Resolved: 28/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Provide Single View of Tenancy

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Anjali Salecha
Resolution:	Done	Votes:	0
Labels:	IA_Done, OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:											
Issue links:	Cloners is cloned by CJR-176 Update Tenancy Related Lists Done Relates relates to CJR-315 Tenancy Hierarchy - Date Format Done relates to CJR-316 Tenancy Hierarchy - Remove orange hig... Done										
Sub-tasks:	<table border="1"> <thead> <tr> <th>Key</th> <th>Summary</th> <th>Type</th> <th>Status</th> <th>Assignee</th> </tr> </thead> <tbody> <tr> <td>CJR-268</td> <td>QA</td> <td>Subtask</td> <td>Done</td> <td></td> </tr> </tbody> </table>	Key	Summary	Type	Status	Assignee	CJR-268	QA	Subtask	Done	
Key	Summary	Type	Status	Assignee							
CJR-268	QA	Subtask	Done								
Grainger Testing:	Pass										
Story point estimate:	8										
Sprint:	CJR Sprint 2										
Rank:	2 01e0u:r										

Description

As a user, I want to see all decent agreements and licenses associated to a tenancy, so that I have a single view of all Qube tenancies linked to a live unit tenancy.

A/C 1 - See a Tenancy Hierarchy

GIVEN a contract has *Record Type* of '_ Residential Tenancy'

WHEN a user views the residential tenancy

THEN a new section will display at the top of the *Details* tab named: **Tenancy Overview**

AND the *Tenancy Overview* will contain a tree view that displays:

- All contract records (of any *Record Type*) that are **above or below** the current record in the tenancy hierarchy.
 - i.e. all parent records, and their parent and child records, AND all child records and their child records.
- AND exclude contract records with *Record Type* '_ Residential Contract' AND *Record Status* Tenancy_Status_c of 'Draft'

AND within a hierarchy grouping, contracts will be ordered by *Start Date*

AND each contract will be hyperlinked (clicking on a contract will open that record in a new tab)

AND [nice to have] the current tenancy being viewed is highlighted

AND where the *Record Type* is '_ Residential Tenancy', display the following details: Record Type, Account Name, Agreement Type, Unit, Record Status

AND where the *Record Type* is '_ Residential Contract', display the following details: Record Type, Record Number, Tenancy Type, Start Date

AND the tree view will default to collapsed, but may be expanded.

The screenshot shows the Grainger PLC software interface. At the top, there's a navigation bar with various tabs like Home, Leads, Accounts, Contacts, Tenancies, Opportunities, Blocks, Buildings, Units, Tasks, Notes, and More. Below the navigation bar, a specific tenancy record for 'Nikki Parkinson' is displayed. The record details include:

- Record Type: Residential Tenancy
- Agreement Type: AST
- Unit: 1005, Halogen House, 217 Chapel St, Salford
- Start Date: 01/04/2024
- End Date: 31/03/2025

Below the record details, there are two tabs: 'Details' (which is selected) and 'Related'. The 'Details' tab shows the 'Tenancy Overview' section, which contains a tree view of contracts and licenses. One license item is highlighted, showing its details: 'License - 00038387' and 'Contract Type - Decant Agreement'. The 'Related' tab is also visible but currently empty.

Implementation Approach

Use LWC tree <https://developer.salesforce.com/docs/component-library/bundle/lightning-tree/example>

example "metatext.js" below:

```
import { LightningElement } from 'lwc';

export default class TreeMetatext extends LightningElement {
  items = [
    {
      label: 'Residential Tenancy - Shaun Baldwin',
      children: [
        {
          label: 'Contract - 00038314',
          children: [
            {
              label: 'Contract Type - New'
            },
            {
              label: 'Contract - 00038355',
              children: [
                {
                  label: 'Contract Type - Renewal'
                }
              ]
            },
            {
              label: 'Contract - 00038399',
              children: [
                {
                  label: 'Contract Type - Change of Sharer'
                }
              ]
            }
          ]
        },
        {
          label: 'License - 00038387',
          children: [
            {
              label: 'Contract Type - Parking License'
            }
          ]
        }
      ]
    }
  ]
}
```

```

name: '1',
metatext: '808, Halogen House, 217 Chapel St, Salford',
expanded: true,
items: [
  {
    label: 'Contract - 00038314',
    name: '2',
    metatext: 'Contract Type - New',
    expanded: true,
  },
  {
    label: 'Contract - 00038355',
    name: '2',
    metatext: 'Contract Type - Renewal',
    expanded: true,
  },
],
}

```

The tree should be generated by starting from the ID of the current Residential Tenancy record and finding the top level parent Contract record based on `TENANCY_C` lookup. i.e. go up the hierarchy until `Contract.TENANCY_C == null`. Then start with the top level Contract record and find all child Contract records where `Contract.TENANCY_C == $TopLevelTenancy`. Then recursively find all child Contract records that belong to these records until there are no more children. When finding these contract records, the selection criteria should exclude as above

Nodes should display fields as per logic in AC's, shown below for clarity

The screenshot shows a software interface for Grainger PLC. A 'Tenancy' record for 'Nikki Parkinson' is displayed. The 'Related' tab is active, showing a list of contracts. Annotations highlight specific fields:

- 'where the Record Type is 'Residential Tenancy'' points to the 'Record Type' field in the header.
- 'where the Record Type is 'Residential Contract'' points to the 'Record Type' field for the first contract in the list.
- 'Record type' points to the 'Record Type' field for the first contract.
- 'Record number' points to the 'Record Number' field for the first contract.
- 'Record status' points to the 'Record Status' field in the header.
- 'Record type, Record Number' points to the 'Record Type' and 'Record Number' fields for the first contract.
- 'Tenancy Type, Start Date' points to the 'Tenancy Type' and 'Start Date' fields for the first contract.

On click of any node, the contract LRP should open in a new tab

Comments

Comment by **Nikki** [04/Mar/25]

TBD if we are going to do a tree view instead?

Comment by **Nikki** [04/Mar/25]

A/C 1 - See a Related List of Licenses linked to the Originating Tenancy.

GIVEN a contract record has a record type 'Residential Tenancy'

WHEN a user views the tenancy's Related tab

THEN a new related list will be displayed: **Licenses**

AND the list will display any contract records that meet the following criteria:

- Record type = 'Residential Tenancy'
- Tenancy ID = Tenancy currently being viewed

AND the following columns will be displayed:

- Record number
- Agreement Type
- Unit
- Start Date
- End Date
- Record Status
- Record Type

Comment by **Nikki** [05/Mar/25]

Search...

- Grainger PLC
- Home
- Leads
- Tenancies
- Accounts
- Contacts
- Opportunities
- Cases
- Blocks
- Buildings
- Units
- Tasks
- Notes
- Reports

Tenancy Residential Tenancy

Tenancy Number	Opportunity	Account Name	Agreement Type	Unit	Tenancy Start Date
00035650		Joe Bloggs		7D, Webber Street, London, SE1 8PZ	01/04/2023

- Details**
- Related

Tenancy Hierarchy

- Residential Tenancy - Shaun Baldwin
 - 808, Halogen House, 217 Chapel St, Salford
 - Contract - 00038314
 - Contract Type - New
 - Contract - 00038355
 - Contract Type - Renewal
 - Contract - 00038399
 - Contract Type - Change of Sharer
 - > License - 00038387
 - Contract Type - Parking License
 - > License - 00038387
 - Contract Type - Decant Agreement

Tenancy Information

Tenancy Owner		Tenancy Record Type	Residential Tenancy
Tenancy Record Type	Residential Tenancy	Tenancy Type	
Tenancy		Agreement Type	
Tenancy Number	00035650	Document Type	
Opportunity		Memorandum of Agreement	
Account Name	Joe Bloggs	Date	
Tenancy Status	Draft	Tenancy Term (months)	12
		Actual Move Out Date	
		Tenancy Start Date	01/04/2023
		Tenancy End Date	31/03/2024

Residential Tenancy - Shaun Baldwin

- ✓ Residential Tenancy - Shaun Baldwin
808, Halogen House, 217 Chapel St, Salford
- Contract - 00038314
Contract Type - New
- Contract - 00038355
Contract Type - Renewal
- Contract - 00038399
Contract Type - Change of Sharer
- > License - 00038387
Contract Type - Parking License
- > License - 00038387
Contract Type - Decant Agreement

Comment by Sam Duncan [19/Mar/25]

Hi Akshat Jain I did some research and I think the formula field (same as we did for Hines) is the best way to do this. i.e. get the very top level Contract using a formula per [https://help.salesforce.com/s/articleView?id=release-notes.rn_apex_5level_SOQLqueries.htm&language=en_US&release=250&type=5#:~:text=Salesforce%20Release%20Notes-,Support%20for%20Five%2DLevel%20Contract,id=release-notes.rn_apex_5level_SOQLqueries.htm&language=en_US&release=250&type=5#:~:text=Salesforce%20Release%20Notes-,Support%20for%20Five%2DLevel%20Contract]

Comment by Sam Duncan [25/Mar/25]

As discussed on review with Nikki Sarah Jessiman and Akshat Jain pls make changes as below

Tenancy Overview

- ✓ Residential Tenancy-show me 46
Decant Agreement Wales-58a, Redbrick Crescent, Barry I...
- ✓ Residential Tenancy-show me 46
Licence-Car Park Bay 25, Fielding House, Carey Lane,-...
- ✓ Residential Tenancy-show me 46
AST-Car Space 108, The Rock, Bury, BL9-Current
- ** Residential Tenancy-show me 46 [This is current record]
Licence-Flat 24, Cooke Place, Block E, Salford, M...
- Residential Tenancy-show me 46
Decant Agreement Normal-8, Cooke Place, Blo...
- Residential Contract-00044418
New-2025-03-21 00:00:00
- Residential (Space instead of dash)
Mid Term Change Of Sharer-2027-03-01 00:00:00
- Residential Contract-00044415
New-2025-03-01 00:00:00

Put Record Status here

Order so that "child tenancy" comes after child contracts

Add two ** for current record (if decant' make it bold)

Fix truncation

Remove time component

Investigate if we can link as below

Details Related

Tenancy Overview

- ✓ Residential Tenancy-show me 46 [This is current record]
Decant Agreement Wales-58a, Redbrick Crescent, Barry I...
- ✓ Residential Tenancy-show me 46 [open in new tab]
Licence-Car Park Bay 25, Fielding House, Carey Lane,-...
- ✓ Residential Tenancy-show me 46
Licence-Car Park Bay 25, Fielding House,
AST-Car Space 108, The Rock, BL9-Current
- Residential Tenancy-show me 46
Licence-Flat 24, Cooke Place, Block E, Salford, M...
- Residential Contract-00044450
Mid Term Change Of Sharer-2027-03-01 00:00:00
- Residential Contract-00044415
New-2025-03-01 00:00:00
- Residential Contract-00044413
New-2025-03-24 00:00:00
- Residential Contract-00044283
New-2025-04-05 00:00:00
- Residential Contract-00044443
New-2025-04-01 00:00:00
- Residential Contract-00044448

 Tenancy
show me 46

Record Type Residential Tenancy Agreement Type Decant Agreement Normal Unit 8, Cooke Place, Block E, Salford, M5 Start Date 03/04/2025

Details Related

Tenancy Overview

- ▼ Residential Tenancy-show me 46
Decant Agreement Wales-58a, Redbrink Crescent, Barry I...
▼ Residential Tenancy-show me 46
Licence-Car Park Bay 25, Fielding House, Carey Lane,...
▼ Residential Tenancy-show me 46
AST-Car Space 108, The Rock, Bury, BL9-Current
▼ Residential Tenancy-show me 46
Licence Fl 1, Cooke Place, Block E, Salford, M5...

Remove highlight on click
If not possible, can we
remove the orange strip
at left?

Residential Tenancy-show me 46 [This is curre...
Decant Agreement Normal-8, Cooke Place, Blo...

Residential Contract-00044418
New-2025-03-20 00:00:00

Residential Contract-00044450
Mid Term Change Of Sharer-2027-03-01 00:00:00

Residential Contract-00044415
New-2025-03-01 00:00:00

Residential Contract-00044413
New-2025-03-24 00:00:00

Residential Contract-00044283
New-2025-04-05 00:00:00

Comment by Nikki [28/Mar/25]

Anjali Salecha , I'm closing this story and creating separate stories for the updates

Comment by Helen Douglas-Teggart [14/Apr/25]

All pass -

Tenancy
Eloise Jephson

Record Type Residential Tenancy	Agreement Type Live Work	Unit Flat 2 Grove House, 11-20 Tudor Grove, Londo	Start Date 01/07/2021	Tenancy End Date 24/05/2025
------------------------------------	-----------------------------	--	--------------------------	--------------------------------

[Details](#) [Related](#) [Tenants](#)
Tenancy Overview

**Residential Tenancy Eloise Jephson
Current Live Work Flat 2 Grove House, 11-20 Tudor Grove, Londo

Residential Contract 00035294
Renewal 25/05/2024

Residential Contract 00032323
Renewal 25/12/2023

Residential Contract 00027538
Renewal 01/08/2023

Residential Contract 00024434
Renewal 25/05/2023

Residential Contract 00021302
Renewal 01/12/2022

Residential Contract 00014425
Renewal 25/05/2022

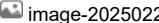
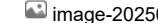
▼ Details

Tenancy Owner	 Jemma Herring		Record Status
Account Name	Eloise Jephson		Agreement Type
Tenancy Length (Months)	47		Document Type
Start Date	01/07/2021		Memorandum of Agree Date
Latest Contract Start Date	01/07/2021		Arrears 
	24/05/2025		

SVOT - Provide Single View of Tenancy (CJR-392)**[CJR-143] Update Contract / Tenancy Related Lists** Created: 25/Feb/25 Updated: 10/Apr/25 Resolved: 12/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Provide Single View of Tenancy

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:	 image-20250225-130150.png	 image-20250226-093401.png	 image-20250226-093717.png	 image-20250410-150005.png	 image-20250410-150129.png	 image-20250410-150034.png
--------------	---	---	--	---	---	---

Issue links:	Blocks is blocked by CJR-159	Contract/Tenancy Start Date, End Date...	Done		
	Relates relates to CJR-314	Update Account > Tenancy Related List	Done		
	relates to GLTL-254	Contracts related list for commercial...	Done		
Sub-tasks:	Key	Summary	Type	Status	Assignee

	CJR-208	QA2	Subtask	Done	Nadia Swarts
Grainger Testing:	Pass				
Story point estimate:	1				
Sprint:	CJR Sprint 2				
Rank:	2 j01dag:6				

Description

A/C 1 - Update Opportunity > Contract Related List

GIVEN an opportunity has record type 'residential'

WHEN user is viewing the **Contracts** related list for the opportunity

THEN the contract record's *Record Type* should be displayed in a new column immediately after Record Number:

Record Number	Tenancy Type	Agreement Type	Unit	Record Status	Created Date
00044117	New	AST	1005, Halogen House, 217 Chapel St, Salford,	Activated	25/02/2025, 12:35
00044131	New	AST	1005, Halogen House, 217 Chapel St, Salford,	Draft	26/02/2025, 09:25
00044132	New	AST	1005, Halogen House, 217 Chapel St, Salford,	Activated	26/02/2025, 09:56

A/C 2 - Update to Unit > Tenancies <https://graingerplc.atlassian.net/browse/CJR-57> A/C 1 - Only Display Tenancies on the Unit

Record Number	Account Name	Record Status	Start Date	End Date	Actual Month
00044132	Nikki Parkinson	Activated	01/03/2025	28/02/2027	

WHEN a user is viewing the 'Tenancies' related list for a unit under the Property Management tab on the record page

THEN the list of tenancies will be updated to only display records where *record type* is 'Residential Tenancy' or 'Commercial Contract'

A/C 3 - Update Account > Tenancy Related List

GIVEN an account has record type 'Person Account' or 'B2B Company'

WHEN user is viewing the **Tenancies** related list for the account

THEN the related list columns will be updated:

- Add *Record Type*, *Tenancy Type*, *Agreement Type* & *Unit* immediately after Record Number
- Remove *Tenancy Name*

AND the list of tenancies will only display records where *record type* is 'Residential Tenancy' or 'Commercial Contract'

Record Number	Tenancy Name	Tenancy Start Date	Tenancy End Date	Status
00044094		01/03/2025		Draft
00044117		01/03/2025	28/02/2027	Draft

Comments

Comment by [Matthew Pitcairn](#) [05/Mar/25]

[Nikki](#) , I have questions around the first line of AC1 and 3, can we chat on next stand up? Thanks

Comment by [Matthew Pitcairn](#) [06/Mar/25]

[Nadia Swarts](#) [Mudzunga Khonani Davhana](#) This story is blocked by #159, will deploy to QA when able

Comment by [Matthew Pitcairn](#) [11/Mar/25]

[Mudzunga Khonani Davhana](#) [Nadia Swarts](#) this story is unblocked and deployed to QA

Comment by [Matthew Pitcairn](#) [11/Mar/25]

[Nikki](#) for AC 3, do you mean the list should show for Accounts with the record type 'Person Account'?

Comment by [Nikki](#) [11/Mar/25]

[Matthew Pitcairn](#) , I tried to update the record types correctly.

Comment by [Helen Douglas-Teggart](#) [10/Apr/25]

AC1 + 2 working

AC 3 - doesn't have Tenancy Type but think it's a mistype for Record Type.

Otherwise- all pass.

Comment by [Helen Douglas-Teggart](#) [10/Apr/25]



Feedback (0)



Contracts (2)

2 items • Sorted by Created Date • Updated a few seconds ago



	<input type="checkbox"/> Record Nu...	Record Type	Tenancy Ty...	Agreemen...	Unit	Record Sta...	Creat
1	<input type="checkbox"/> 00055190	Residential Contract	New	AST	Apt 401, Abbevil...	Activated	09/04
2	<input type="checkbox"/> 00055191	Residential Tenancy	New	AST	Apt 401, Abbevil...	Current	09/04

[View All](#)

RTR Not Required

[Update Ten](#)[View All](#)

Tenancies (1)

1 item • Sorted by Record Number • Filtered by Record Type • Updated a minute ago



	<input type="checkbox"/> Record ... ↓	Record Type	Agreement Type	Unit	Tenancy Start D...	Tenancy En...
1	<input type="checkbox"/> 00055191	Residential Tenancy	AST	Apt 401, Abbevil...	09/04/2025	08/04/2026

[View All](#)

Authorisations (1)

Authorisation Number

Status

Document Route Selected

Last Modified Date



Tenancies (2)

2 items • Sorted by Created Date • Filtered by Record Type • Updated a few seconds ago

Record Number	Account Name	Record Status	Start Date	End Date	Actual I
1 00055191	Justin Bieber	Current	09/04/2025	08/04/2026	
2 00045811	Johanna Ledwaba	Current	12/06/2021		

[View All](#)

End Of Tenancies (0)

Two current tenancies- data issue?

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

↳ [CJR-142] Rename 'Tenancy' Fields Created: 25/Feb/25 Updated: 02/May/25 Resolved: 27/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
-------	-------	-----------	------------

Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, Prod_Approved, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:			
Issue links:	Cloners clones	CJR-140 Move/Rename Tenancy Number	Done
Sub-tasks:	Key CJR-144	Summary QA2	Type Subtask
Sprint:	CJR Sprint 1		
Rank:	2 j01dae:i		

Description

For ALL contract record types: Residential contract, commercial contract & residential tenancy:

1. Change the label of the "Tenancy Start Date" field to "Start Date"
2. Change the label of the "Tenancy End Date" field to "End Date"
3. Change the label of the "Tenancy Status" field to "Record Status"

[SVOT - Create Tenancies in Salesforce that Map to Qube](#) (CJR-389)

[\[CJR-140\] Move/Rename Tenancy Number](#) Created: 25/Feb/25 Updated: 02/May/25 Resolved: 26/Feb/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, Prod_Approved, UAT		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Attachments:			
---------------------	--	--	--

Issue links:	Cloners			
	is cloned by	CJR-142	Rename 'Tenancy' Fields	Done
Story point estimate:	0.5			
Sprint:	CJR Sprint 1			
Rank:	2 0193g:9			

Description

For ALL contract record types: Residential contract, commercial contract & residential tenancy:

1. Change the label of the "Tenancy Number" field to "Record Number"
2. Move the field to the System Information Section

The screenshots illustrate the modification of tenancy record numbers across three different contract record types:

- Tenancy Record Type:** Residential Contract. The original record number is 00043987, which has been changed to 00043939.
- Tenancy Record Type:** Residential Tenancy. The original record number is 00043987, which has been changed to 00043939.
- Tenancy Record Type:** Commercial Contract. The original record number is 00043988, which has been changed to 00043988.

In each view, the "Details" tab is selected, showing the updated record number in the "Tenancy Number" field.

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

[\[CJR-132\] QA - Create a Tenancy for a New Grainger Trust](#) Created: 24/Feb/25 Updated: 17/Apr/25 Resolved: 18/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Sarah Jessiman
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:													
Issue links:	Relates												
	relates to	CJR-46	Create/Update Tenancies										
Sub-tasks:	<table border="1"> <thead> <tr> <th>Key</th> <th>Summary</th> <th>Type</th> <th>Status</th> <th>Assignee</th> </tr> </thead> <tbody> <tr> <td>CJR-243</td> <td>QA</td> <td>Subtask</td> <td>Done</td> <td></td> </tr> </tbody> </table>			Key	Summary	Type	Status	Assignee	CJR-243	QA	Subtask	Done	
Key	Summary	Type	Status	Assignee									
CJR-243	QA	Subtask	Done										
Grainger Testing:	Pass												
Story point estimate:	1												
Sprint:	CJR Sprint 2												
Rank:	2 01e0s:c												

Description

New Grainger Trust Lease - Scenario to Test:

1. Create an opportunity with *Agreement Type* 'AST Affordable' and *Tenancy Type* 'New'
2. Create a contract via the 'Create Contract' button.
 1. No agreement is created.
3. Capture a *PMS Reference ID* on the opportunity. [to mimic GREP integration on live]
4. Move the opportunity to 'Audit' stage.
5. Open the contract record and update *Record Status* to 'Activated'.

THEN per <https://graingerplc.atlassian.net/browse/CJR-46> :

- A new **tenancy record** will be created with identical details to the activated contract, with a *Record Type* of 'Residential Tenancy'
- The *Tenancy* field on the activated **contract** will be updated with the new tenancy record's ID
- The *Tenancy* field on the linked **opportunity** will be updated with the new tenancy record's ID
- The *PMS Reference* on the new tenancy record will be populated with the *PMS Reference* on the linked *opportunity*.

Comments

Comment by Helen Douglas-Teggart [16/Apr/25]

[00070938 | Tenancy | Salesforce|https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Contract/800Pv00000G7V7VIAV/view] - permissions issue

Comment by Elisabeta Mihalache [17/Apr/25]

Opportunity Helena 2.0	
Opportunity Name Helena 2.0	Opportunity Owner
Account Name Helena Lalogianni	Second Opportunity Owner
Stage Audit	TPT / Renewal User
Sub Stage	Close Date 31/08/2025
Tenancy Type New	Lead Source
COS Opportunity? <input checked="" type="checkbox"/>	Adverse Credit?
Agreement Type AST (Affordable)	Household income at least 30x rent
Parent Opportunity <input checked="" type="checkbox"/>	Is Guarantor Required
Tenancy 00070942	Number of occupants
Processed By GREP <input checked="" type="checkbox"/> Not Processed	Opt out of Green Lease <input checked="" type="checkbox"/>
Passing Rent Checked In Qube <input checked="" type="checkbox"/>	Suppress Automated Renewal Chase Emails <input checked="" type="checkbox"/>
Passing Rent	PMS Reference <input checked="" type="checkbox"/> 122659

 Tenancy	Helena Lalogianni		
Tenancy Owner			Record Status
 Elisabeta Mihalache			Draft
Account Name			Agreement Type
Helena Lalogianni			AST (Affordable)
Tenancy Length (Months)	4		Document Type
Start Date	30/04/2025		Memorandum of Agreement
Latest Contract Start Date			Arrears
Tenancy End Date	29/08/2025		GPLC Notice Initiated
Actual Move Out Date			
Additional Information			
Unit	113 Argo Apts, 4 Silvertown Way, London, E16 1YD		Current Rent
Uplift %	4.00%		Security Deposit Amount
Previous Rent			£0.00
Break Clause			TDS Reference
Check Contract			Live Work Clause
Special Clauses			Special Clause Free Text
Description			
System Information			
PMS Reference	122659		Record Number
Record Type			00070942
Status			

▼ Details

Tenancy Owner	Elisabeta Mihalache	Tenancy Type	New
Account Name	Helena Lalogianni	Agreement Type	AST (Affordable)
Record Status	Activated	Document Type	Memorandum of Agreement
Contract Term (months)	4	Tenancy	00070942
Start Date	30/04/2025	Opportunity	Helena 2.0
End Date	29/08/2025		
Actual Move Out Date			

▼ Additional Information

Unit	113 Argo Apts, 4 Silvertown Way, London, E16 1YD	Rent	1,910.00
Uplift %	4.00%	Security Deposit Amount	£0.00
Break Clause	Check Contract	Live Work Clause	
Tenant Break		Landlord Break	
Special Clauses		Special Clause Free Text	
Description			

▼ System Information

Activated By	Record Number	00070941
--------------	---------------	----------

URL: <https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Opportunity/006Pv00000FsbjWIAR/view>
Pass

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

↳ [CJR-129] Users can see Qube Tenancy Details Created: 24/Feb/25 Updated: 23/Apr/25 Resolved: 05/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	Dev_Reviewed, Integrations, OpenBox, REFINED, SVOC, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:															
Issue links:	<table border="1"> <tr><td>Blocks</td><td>CJR-53</td><td>Import Passing Rent & Current Rent in...</td><td>To Do</td></tr> <tr><td>blocks</td><td>CJR-49</td><td>EXCLUDE - Update EOT to Source Latest...</td><td>Done</td></tr> <tr><td>blocks</td><td>CJR-55</td><td>Create/Update Tenancy from Qube [Grai...</td><td>Done</td></tr> </table>			Blocks	CJR-53	Import Passing Rent & Current Rent in...	To Do	blocks	CJR-49	EXCLUDE - Update EOT to Source Latest...	Done	blocks	CJR-55	Create/Update Tenancy from Qube [Grai...	Done
Blocks	CJR-53	Import Passing Rent & Current Rent in...	To Do												
blocks	CJR-49	EXCLUDE - Update EOT to Source Latest...	Done												
blocks	CJR-55	Create/Update Tenancy from Qube [Grai...	Done												

	blocks	CJR-159	Contract/Tenancy Start Date, End Date...	Done
	blocks	CJR-187	Update EOT to Source Latest Passing R...	Done
	Cloners			
	clones	CJR-45	Users can see Tenancy & Tenancy Conta...	Done
	Relates			
	relates to	CJR-269	Update Tenancy Term Formula	Done
	relates to	CJR-448	Contract Term (Years) Not Visible To ...	Done
Sub-tasks:				
	Key	Summary	Type	Status
	CJR-158	QA2	Subtask	Done
	CJR-182	QA1	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	2			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:00g			

DescriptionA/C 1 - Rename existing Tenancy Term fields

WHEN a user views the contract details

THEN the following fields will be renamed:

- Tenancy Term (months) => Contract Term (months)
 - currently displayed for record type 'Residential Contract' or 'Commercial Contract'
- Tenancy Term (years) => Contract Term (years)
 - Note this field is only visible on Commercial Contracts

Tenancy Term (months)	300
Tenancy Term (years)	25.00

A/C 2 - Add New Tenancy Fields

GIVEN a tenancy record has a record type of 'Residential Tenancy'

WHEN a user views the tenancy details

THEN the following fields will be displayed

AND the fields will be visible to all users:

Field	New/Existing	Data Type	Help Text	Required	Editable	Section / Location
Latest Contract Start Date	New	Date	Qube Start Date	No	No	Details section > Move Tenancy Start Date above Tenancy/Contract Terms & display this field to the right of Tenancy Start Date
Latest Contract Term (Months)	New	Numeric, zero decimals	Qube Lease Term	No	No	Details section > Display this field to the right of Tenancy Term (months)
Tenancy Term (Months)	New	Numeric, zero decimals Formula = The number of months from [Start Date] to the later of [End Date or Today]	Months from the tenancy start date until the later of tenancy end date or the current date.	No	No	Replace the existing Contract Term (months) field on the page layout.
Current Rent	New	Currency; 2 decimals	Current rent, while the contract was active.	No	No	Additional Information > Under Unit
Passing Rent	New	Currency; 2 decimals	Previous rent, while the contract was active.	No	No	Additional Information > Under Uplift
First Break Clause Date	Existing	Date	Residential tenancies: Sourced from Qube	No	No	Additional Information > Under existing Break fields
Break Clause Notice (Months)	Existing	Numeric	Residential tenancies: Sourced from Qube	No	No	Additional Information > Under existing Break fields

Implementation Approach

Visible to TBD PERMISSION SET

CommentsComment by [Helen Douglas-Teggart](#) [14/Apr/25]

AC1 - Contract Term in months - pass

Contract Term in years- not visible on Commercial contract - possible permission issue?

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings Units Tasks Reports Dashboards Calendar Right to Rents Feed

Tenancy 00038349

Record Type Commercial Contract	Agreement Type Commercial License	Account Name Jacob's Bakery	Unit Clippers - Unit 1 Zerega Way M50	Start Date 04/03/2025	End Date
------------------------------------	--------------------------------------	--------------------------------	--	--------------------------	----------

Details Related

▼ Details

Tenancy Owner  Vicki Turnbull	Start Date 04/03/2025
Opportunity Commercial UAT Test	End Date
Account Name Jacob's Bakery	Actual Move Out Date
Unit  Clippers - Unit 1 Zerega Way M50	Rent  3,125.10
Record Status Activated	Break Clause Tenant Break
Tenancy Type New	First Break Clause Date  04/07/2025
Agreement Type Commercial License	Break Clause Notice  (Months) 4
Contract Term (months)	

▼ Rent Review

▼ Additional Information

Description 233 Maida Vale Bsmnt/Grnd Flr
--

▼ System Information

AC2 - Pass - passing is now previous but happy with that

Comment by Sarah Jessiman [15/Apr/25]

Helen Douglas-Teggart Thanks - we are looking into this issue with Contract Term (Years) not visible on Commercial contract with your user.

Comment by Sarah Jessiman [15/Apr/25]

Helen Douglas-Teggart This issue has now been fixed in <https://graingerplc.atlassian.net/jira/software/projects/CJR/boards/237?selectedIssue=CJR-448> and is ready

Comment by Helen Douglas-Teggart [23/Apr/25]

pass

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings Units Tasks

Tenancy 00038350

Record Type Commercial Contract	Agreement Type Commercial Lease	Account Name BLS International Services (UK) Ltd	Unit Unit 4, Juniper House	Start Date 05/03/2025	End Date 04/03/2030
------------------------------------	------------------------------------	---	-------------------------------	--------------------------	------------------------

Details Related

▼ Details

Tenancy Owner  Deborah Stein	Start Date 05/03/2025
Opportunity GREP-CoA BLS International Services (UK) Ltd - Unit 4, Juniper House	Rent Start Date
Account Name BLS International Services (UK) Ltd	End Date 04/03/2030
Unit  Unit 4, Juniper House	Actual Move Out Date
Record Status Activated	Rent  0.00
Tenancy Type New	Deposit to be Paid 
Agreement Type Commercial Lease	Break Clause Rolling Break
Contract Term (months) 60	First Break Clause Date  05/08/2025
Contract Term (years) 5.00	Break Clause Notice  2

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

↳ [CJR-127] Remove Tenancy Contact Roles updates from EOT Created: 21/Feb/25 Updated: 17/Apr/25 Resolved: 06/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, SVOC, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Issue links:	Relates	Assignee:	Nadia Swarts	To Do
	relates to	CJR-118	Create & Update Tenancy Contact Roles...	
Sub-tasks:	Key	Summary	Type	Status
	CJR-175	QA2	Subtask	Done
Grainger Testing:	Pass			
Story point estimate:	1			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:008			

Description

The following functionality implemented in <https://graingerplc.atlassian.net/browse/CJR-43> will be **removed**:

A/C 4 - End Tenancy Contact Roles from EOT Check Out

GIVEN a contract record has a *record type* of 'Residential Tenancy'
AND has one or more **tenancy contact roles** with no end date

WHEN the *Actual Move Out Date* is populated on the tenancy record
THEN those tenancy contact role(s) will be updated:

- *End Date* = tenancy's *Actual Move Out Date*

Comments

Comment by Elisabeta Mihalache [17/Apr/25]

Tenancy
Justin Bieber

Record Type Residential Tenancy	Agreement Type Decant Agreement Normal	Unit Apt 113, Abbeville Apts, 37 London Rd, Barkin	Start Date 11/04/2025	Tenancy End Date 10/06/2025
------------------------------------	---	---	--------------------------	--------------------------------

Details Related **Tenants**

Current Tenancy Contact Roles (1)
1 item • Filtered by End Date • Updated a few seconds ago

Contact ID	Role
1 <input type="checkbox"/> Justin Bieber	Lead Tenant

[View All](#)

Previous Tenancy Contact Roles (0)

Tenancy
Justin Bieber

Details Related **Tenants**

Tenancy Overview

- **Residential Tenancy Justin Bieber
Current Decant Agreement Normal Apt 113, Abbeville Apts, 37 London Rd, Barkin

Details

Tenancy Owner  Jessica Howe	Record Status Current
Account Name Justin Bieber	Agreement Type Decant Agreement Normal
Tenancy Length (Months) 2	Document Type Decant Agreement Normal
Start Date 11/04/2025	Memorandum of Agree
Latest Contract Start Date 11/04/2025	Arrears <input type="checkbox"/>
Tenancy End Date 10/06/2025	GPLC Notice Initiated <input type="checkbox"/>
Actual Move Out Date 17/04/2025	

Additional Information

Unit Apt 113, Abbeville Apts, 37 London Rd, Barkin	Current Rent <input type="checkbox"/>
Lease %	Security Deposit Amour <input type="checkbox"/>

End of tenancy field on contact role not populated

Comment by [Elisabeta Mihalache](#) [17/Apr/25]
Sarah Jessiman Nadia Swarts Mudzunga Khonani Davhana this seems to have failed. Would you be able to please look into it. Link for Tenancy used: https://graingerplc.atlassian.net/sr/jira.issueviews:searchrequest-fullcontent/11684/SearchRequest-11684.html?atl_token=3128993d352c8cd...

Comment by [Nadia Swarts](#) [17/Apr/25]
Elisabeta Mihalache Just to clarify, the intent of the story is to remove the functionality where the **Actual Move Out Date** auto-populates the **Contact Role's End Date**

Comment by [Elisabeta Mihalache](#) [17/Apr/25]
Thanks [Nadia Swarts](#). I didn't actually see that the functionality was supposed to be **removed**. In that case, this is a pass 😊

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

[CJR-124] Rename 'Create Tenancy' button to 'Create Contract' Created: 21/Feb/25 Updated: 02/May/25 Resolved: 25/Feb/25

Status:	Done		
Project:	Customer Journey - Renewals Project		
Components:	None		
Affects versions:	None		
Fix versions:	Sprint 2		
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube		

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, Prod_Approved, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Sub-tasks:	Key	Summary	Type	Status
	CJR-141	QA2	Subtask	Done
Story point estimate:	0.5			
Sprint:	CJR Sprint 1			
Rank:	2 j01d0n:			

Description

GIVEN an opportunity has record type 'Residential'
AND meets the existing criteria to display the 'Create Tenancy' button
AND the user has access to the existing 'Create Tenancy' button

WHEN a user is viewing opportunity details
THEN the 'Create Tenancy' button will display as '**Create Contract**'
AND clicking on the button will open the existing screen, renamed 'Create Contract'.

Opportunity Action
Create Tenancy

SVOT - Provide Single View of Tenancy (CJR-392)

[\[CJR-123\] Create a New License from an Opportunity or Tenancy](#) Created: 20/Feb/25 Updated: 15/Apr/25 Resolved: 17/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Provide Single View of Tenancy

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:											
Issue links:	Blocks blocks CJR-148 Create Decant or License Tenancy Link... Done is blocked by CJR-122 Create a Tenancy for a Decant Agreement Done Relates relates to CJR-225 "Move in Movies Exempt" should be Fal... Done relates to CJR-111 Users cannot edit Tenancy and Parent ... Done relates to CJR-119 Create a Renewal from a Tenancy Done										
Sub-tasks:	<table border="1"> <thead> <tr> <th>Key</th> <th>Summary</th> <th>Type</th> <th>Status</th> <th>Assignee</th> </tr> </thead> <tbody> <tr> <td>CJR-220</td> <td>QA</td> <td>Subtask</td> <td>Done</td> <td>Mudzunga Khonani Davhana</td> </tr> </tbody> </table>	Key	Summary	Type	Status	Assignee	CJR-220	QA	Subtask	Done	Mudzunga Khonani Davhana
Key	Summary	Type	Status	Assignee							
CJR-220	QA	Subtask	Done	Mudzunga Khonani Davhana							
Grainger Testing:	Pass										
Story point estimate:	3										
Sprint:	CJR Sprint 2										
Rank:	2 j012pb:00001										

Description

When a user creates a new license opportunity from a lease opportunity or from an existing tenancy, then the license opportunity should not be linked to the lease's tenancy, so that the license can be linked to its own tenancy on completion.

A/C 1 - Create New License Opportunity from an Opportunity:

GIVEN an opportunity has a record type 'Residential Opportunity'

WHEN a user selects the existing 'Create License' button from the opportunity screen

THEN the existing *Create License* screen will display

AND the *Tenancy Type* "New" will not be editable

AND the list of *Agreement Types* available for selection will be limited to: Parking License, Shed License, Parking license Oxford

AND, on saving, a new license opportunity will be created as per existing logic:

- Opportunity details will be prepopulated, including:
 - *Parent Opportunity* = the opportunity from which the license is created
 - *Tenancy* = null
 - *Originating Tenancy* = null
- Opportunity contact roles will be created.

Opportunity Action Create Licence

Predefined Field Values

Action Detail		View Layout	
Label	Create Licence	Object Name	Opportunity
Standard Label Type		Action Type	Create a Record
Name	Create_Licence	Relationship Field	Parent_Opportunity
Description	Create a Licensed Opportunity	Icon	
Target Object	Opportunity	Created By	David Picklesley, 20/07/2020, 16:44
Record Type	Residential Opportunity	Modified By	Open_box, 11/02/2025, 15:04
Create Feed Item	<input checked="" type="checkbox"/>	View Layout	
Success Message			
Created By	David Picklesley, 20/07/2020, 16:44		

Predefined Field Values

Action	Field Name	API Name	Field Type	Value
Account Name	AccountName	Account	Lookup	Opportunity.AccountId
Advance Payment Exempt	Advance_Payment_Exempt_c		Checkbox	true
Exempt from Referencing	Exempt_from_Refencing_c		Checkbox	true
Parent Opportunity	Parent_Opportunity_c		Lookup	Opportunity.Id
Pull OCRs Hidden	Pull_OCRs_Hidden_c		Checkbox	true
Stage	StageName		Picklist	Post Viewing
Tenancy Type	Tenancy_Type_c		Picklist	New

A/C 2 - Create New License Opportunity from a Tenancy: Add Button

GIVEN a user has access to the existing 'Create License' button on the opportunity

WHEN the user views a tenancy that has a record type 'Residential Tenancy'

AND Tenancy Status is 'Activated'

THEN a 'Create License Opportunity' button will be available

AND selecting the button will open the Create License screen above.

A/C 3 - Create License Opportunity from a Tenancy

GIVEN a user selected the a 'Create License Opportunity' button from the tenancy screen

WHEN the user successfully 'Saves' the Create License screen above

THEN a new license opportunity will be created with the following default values:

- Opportunity details will be prepopulated, including:
 - Parent Opportunity = null
 - Tenancy = null
 - Originating Tenancy = Tenancy from which the opportunity is created
 - Opportunity name: As entered above
 - Close Date: As entered above
 - Tenancy Type: New
 - Agreement Type: As selected above
 - Account Name: Tenancy's account
 - Advance Payment Exempt: True
 - Exempt from Referencing: True
 - Pull OCRs Hidden: True
 - Stage: Post Viewing

AND opportunity contact role records will be created for each tenancy contact role that has no End Date. **TBD if any additional filters need to be applied as per current logic.****Implementation Approach**

- Quick action ideally, else screen flow

Comments

Comment by Nikki [28/Febr/25]

Sam Duncan , Will these 'Create Renewal' and 'Create License' buttons on the opportunity related list be updated automatically?

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings Units Tasks Notes Report

Tenancy
Shaun Baldwin

1	<input type="checkbox"/> 00038312	Shaun Baldwin	Residential Contract
2	<input type="checkbox"/> 00038311	Shaun Baldwin	Residential Contract
View All			

End Of Tenancies (0)

Opportunities (1)
1 item • Updated 5 minutes ago

<input type="checkbox"/> Opportunity Name	Stage	Close Date
1 <input type="checkbox"/> Shaun Baldwin - New Lease - 808 Halogen	Audit	31/03/2025

[View All](#)

<https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Contract/800Pv00000ExRydiAF/view>

Comment by Sam Duncan [28/Feb/25]

Nikki we control which buttons display here. At the moment they're the same "create renewal" and "create license" buttons that show on the opportunity page. I think we can do better with tenancy?

graingerplc--uat.sandbox.lightning.force.com/visualEditor/appBuilder.app?&retUrl=https%3A%2F%2Fgraingerplc--uat.sandbox.lightning.force.com%2Flightning App Builder Pages Residential Tenancy Record Page

Desktop Shrink To View

Contracts (6)
6 items • Updated a few seconds ago

<input type="checkbox"/> Record Number	Account Name	Record Type	Record Status
1 <input type="checkbox"/> Sample Text			Sample Text
2 <input type="checkbox"/> Sample Text			Sample Text
3 <input type="checkbox"/> Sample Text			Sample Text
4 <input type="checkbox"/> Sample Text			Sample Text
5 <input type="checkbox"/> Sample Text			Sample Text
6 <input type="checkbox"/> Sample Text			Sample Text

[View All](#)

End Of Tenancies (0)

Opportunities (6)
6 items • Updated a few seconds ago

<input type="checkbox"/> Opportunity Name	Stage	Close Date
1 <input type="checkbox"/> Sample Text	Sample Text	
2 <input type="checkbox"/> Sample Text	Sample Text	
3 <input type="checkbox"/> Sample Text	Sample Text	
4 <input type="checkbox"/> Sample Text	Sample Text	
5 <input type="checkbox"/> Sample Text	Sample Text	
6 <input type="checkbox"/> Sample Text	Sample Text	

[View All](#)

Tenancy History (5)

Date	Field	User	Original Value

Comment by Nikki [03/Mar/25]

Thanks Sam Duncan . Added a new story <https://graingerplc.atlassian.net/browse/CJR-170>

Comment by Helen Douglas-Teggart [15/Apr/25]

All pass - create licence button not visible in closed won opportunity

Sandbox: UAT | Log out

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings Units More

Opportunity Test 8 Temple linked licence

Create Offers Edit Log a Call New Task New Event New Note

Account Name	Contract Start Date	Tenancy End Date	Agreed Terms	Agreed Unit	Rent £0.00
--------------	---------------------	------------------	--------------	-------------	------------

Post View... Send Offer Offer Sele... Reference... On Refere... Move in ... Signing ✓ Mark Stage as Complete

Offers (0)

Agreements (0) New Change Owner

Details Related

Opportunity Name	Test 8 Temple linked licence	Opportunity Owner	Helen Douglas-Teggart
Account Name	Benjamin Lewis	Second Opportunity Owner	
Stage	Post Viewing	TPT / Renewal User	
Sub Stage		Close Date	30/04/2025
Tenancy Type	New	Lead Source	
COS Opportunity?	Not applicable	Adverse Credit?	
Agreement Type	Parking Licence	Household income at least 30x rent	
Parent Opportunity	RENEWAL - 8 Temple Dwellings - 01.07.2024 - AWAITING GAS CERTIFICATE	Is Guarantor Required	
Tenancy		Number of occupants	
Processed By	Not Processed	Opt out of Green Lease	
		Suppress Automated Renewal Chase Emails	
		PMS Reference	

Activity Chatter

Filters: All time • All activities • All types Refresh • Expand All • View All

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

SVOT - Provide Single View of Tenancy (CJR-392)**[CJR-122] Create a Tenancy for a Decant Agreement** Created: 20/Feb/25 Updated: 25/Apr/25 Resolved: 14/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Provide Single View of Tenancy

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:									
Issue links:	<table> <tr> <td>Blocks</td> <td>GJR-123</td> <td>Create a New License from an Opportun...</td> <td>Done</td> </tr> <tr> <td>blocks</td> <td>GJR-148</td> <td>Create Decant or License Tenancy Link...</td> <td>Done</td> </tr> </table>	Blocks	GJR-123	Create a New License from an Opportun...	Done	blocks	GJR-148	Create Decant or License Tenancy Link...	Done
Blocks	GJR-123	Create a New License from an Opportun...	Done						
blocks	GJR-148	Create Decant or License Tenancy Link...	Done						

Relates					
	relates to	GJR-111	Users cannot edit Tenancy and Parent ...	Done	
	relates to	GJR-305	Create decant - Update agreement types	Done	
	relates to	GJR-441	{ Not a bug} Create a Tenancy for a D...	Done	
	relates to	GJR-43	Update/End Tenancy, Contract & Tenanc...	Done	
Sub-tasks:	Key	Summary	Type	Status	Assignee
	CJR-216	QA2	Subtask	Done	Nadia Swarts
Grainger Testing:	Pass				
Story point estimate:	5				
Sprint:	CJR Sprint 2				
Rank:	2 j01dbh:				

Description

As a user, I want to create a decant agreement opportunity from an existing tenancy, so that the decant tenancy is associated to the original tenancy.

A/C 1 - Add 'Create Decant Opportunity' button to Tenancy

GIVEN a contract record has a *record type* 'Residential Tenancy'

AND *Tenancy Status* is 'Activated'

WHEN a user views the tenancy details screen

THEN a 'Create Decant Opportunity' button will be visible.

A/C 2 - Select Values on 'Create Decant' Screen

WHEN a user clicks on the 'Create Decant Opportunity' button

THEN a *Create Decant* screen will display (similar to the *Create Renewal* screen below) with the following fields:

- Opportunity name - editable; required
- Close Date - editable; required
- Agreement Type - editable; required
 - If the current tenancy has an *Agreement Type* of "Occupation Contract": Then default to "Decant Agreement Wales"
 - Otherwise, default to "Decant Agreement Normal"
- Originating Tenancy - not editable; current tenancy
- Tenancy Type - not editable; "New"

A/C 3 - Add 'Originating Tenancy' field to Opportunity

- Add a new field to the **opportunity** object:
 - Originating Tenancy*: Optional, tenancy/contract lookup
- The field is not displayed on any opportunity record/page layouts.

A/C 4 - Create Decant Opportunity Record

WHEN a user successfully saves the 'Create Decant' screen above

THEN a new opportunity record will be created with the following default values:

- Opportunity name: As entered above
- Close Date: As entered above
- Tenancy Type: New
- Agreement Type: As selected above
- Originating Tenancy: Current tenancy
 - Note *Tenancy* must be: Null
- Account Name: Tenancy's account
- Advance Payment Exempt: True
- Exempt from Referencing: True
- Move in Monies Exempt: True
- Stage: Post Viewing

AND opportunity contact role records will be created for each **tenancy contact role** that has no *End Date*

~~AND an offer and offer line item records will be created:~~

- Opportunity name: New decent opportunity created
- Account name: Tenancy's account
- Primary offer: True
- Tenancy type: New
- Agreement Type: As selected above
- Status: Draft

Implementation Approach

- Use same / similar screen flow to <https://graingerplc.atlassian.net/browse/CJR-119> ?

Comments

Comment by Anjali Salecha [07/Mar/25]

Hi Nikki, what should be the source data for creating offer line items?

Comment by Nikki [07/Mar/25]

Anjali Salecha , I don't think we can create the line item if we don't have the unit - let's just leave out the offer record for now. I removed it from the A/C

Comment by Helen Douglas-Teggart [14/Apr/25]

AC 1-3 pass

AC4 - no opportunity contact roles created

Comment by Helen Douglas-Teggart [14/Apr/25]

Opportunity
cooke test

Account Name	Contract Start Date	Tenancy End Date	Agreed Terms	Agreed Unit	Rent
David Cooke					£0.00

Post Viewing Send Offer Offer Sele... Reference... On Refere... Move in ... Signing

Mark Stage as Complete

Offers (0)

Agreements (0)

New Change Owner

Details Related

Contact Roles (0) Add Contact Roles Edit Contact Roles

Related Opportunities (0)

Right to Rents Enter search term ...

No activities to show.
Get started by sending an email, scheduling a task, and more.

Comment by Mudzunga Khonani Davhana [15/Apr/25]

Hi Helen Douglas-Teggart , The Tenancy from which the Decant opportunity is created needs to have Tenancy Contact roles with no End Date in order to have the contact have any Tenancy Contact Roles. Link to Tenancy: [00045768 | Tenancy | Salesforce|https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Contract/800Pv00000Fsyg6lAB/view]

Tenancy with Contact Roles without an End Date

<https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Contract/800Pv00000Fsyg6lAB/view>

Import favourites | Open Box Intranet ... | Activity Feed - Team... | My Dashboard | Azure DevOps | ABN AMRO Capital... | [OB_Sprint UAT It...

Sandbox: UAT | Log out

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings

Tenancy Nikki Parkinson

Create End of Tenancy Create Ren...

Record Type Residential Tenancy	Agreement Type Parking license Oxford	Unit 6, Fernside Court, Holders Hill Road, Hendon,	Start Date 01/05/2025	Tenancy End Date 30/04/2027
------------------------------------	--	---	--------------------------	--------------------------------

Details Related **Tenants**

Current Tenancy Contact Roles (1)
1 item • Filtered by End Date • Updated a few seconds ago

Contact ID	Role	Start Date
1 Nikki Parkinson	Tenant	01/04/2025

[View All](#)

Previous Tenancy Contact Roles (1)
1 item • Filtered by End Date • Updated a few seconds ago

Contact ID	Role	Start Date
1 Person-Acc Test	Tenant	01/05/2025

[View All](#)

Decant Opportunity with Contact Roles

← ⏪ https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Opportunity/006Pv00000Fq5sbIA/view

Import favourites | Open Box Intranet -... | Activity Feed - Team... | My Dashboard | Azure DevOps | ABN AMRO Capital... | IOB_Sprint UAT

Sandbox: UAT | [Log out](#)

 Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings

Opportunity **test decent 2**

Account Name Nikki Parkinson	Contract Start Date	Tenancy End Date	Agreed Terms	Agreed Unit	Rent £0.00
---------------------------------	---------------------	------------------	--------------	-------------	---------------

Post Viewing Send Offer Offer Selected References R... On Referenc... Move in Mon...

Offers (0)

Agreements (0)

Details **Related**

Contact Roles (1)

Contact Name	Active	Role	Email	Relationship	Di
Nikki Parkinson	<input checked="" type="checkbox"/>	Tenant	new@003nz0000...		

View All

Comment by Helen Douglas-Teggart [25/Apr/25]

Thanks Mudzunga Khonani Davhana - makes sense!

Pass

Opportunity
DECant on Jellycat

Account Name Jelly Cat	Contract Start Date	Tenancy End Date	Agreed Terms	Agreed Unit	Rent £0.00
---------------------------	---------------------	------------------	--------------	-------------	---------------

Post Viewing → Send Offer → Offer Selected → References Requested → On Referencing →

Offers (0)

Agreements (0)

Related

Contact Roles (4)

4 items • Sorted by Primary • Updated a few seconds ago

Contact Name	Active	Role	Email	Relationship	Direct Debit...	Referenc...
Dan Burn	<input checked="" type="checkbox"/>	Tenant	danburn@graingerplc.com			
Jelly Cat	<input checked="" type="checkbox"/>	Lead Tenant	jellycat@graingerplc.com			
Lewis Hall	<input checked="" type="checkbox"/>	Tenant	lewhallnufc@graingerplc.com			
Eddie Howe	<input checked="" type="checkbox"/>	Guarantor	eddiehowe@graingerplc.com			

[View All](#)

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

[\[CJR-119\] Create a Renewal from a Tenancy](#) Created: 20/Feb/25 Updated: 29/Apr/25 Resolved: 12/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	Dev_Reviewed, OpenBox, REFINED, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:	
Issue links:	Blocks blocks CJR-199 UAT - J HOWE - Can't see renewal button Done blocks CJR-201 UAT - J HOWE - Unable to create renewal Done blocks CJR-204 UAT - J HOWE - Unsure what child cont... Done is blocked by CJR-47 Data Migration - Create Tenancy for a... Done is blocked by CJR-109 Link renewal opportunity to tenancy Done

	is blocked by	CJR-548	Test bug	Done
	Relates			
	relates to	CJR-549	GREP passing back null Tenancy End Da...	In Review
	relates to	CJR-63	Manually Create a New Tenancy Review ...	To Do
	relates to	CJR-123	Create a New License from an Opportun...	Done
	relates to	CJR-202	Can't Renew an Opportunity	Done
	relates to	CJR-205	Toast Message and Move-in date from r...	Done
Sub-tasks:	Key	Summary	Type	Status
	CJR-196	QA	Subtask	Done
				Mudzunga Khonani Davhana
Grainger Testing:	Retest			
Story point estimate:	5			
Sprint:	CJR Sprint 2			
Rank:	2 j012pb:0000i			

Description

When manually creating a renewal opportunity, users should create the opportunity from the tenancy and no longer from the last opportunity.

Acceptance Criteria:A/C 1 - Hide Existing 'Create Renewal' button on Opportunity

GIVEN an opportunity has a record type 'Residential Opportunity'

WHEN a user views the opportunity screen

THEN the 'Create Renewal' button will no longer be displayed.

A/C 2 - Add 'Create Renewal' Button to Tenancy

GIVEN a user has access to the existing 'Create Renewal' button on the opportunity

WHEN the user views a tenancy that has a record type 'Residential Tenancy'

AND Tenancy Status is 'Activated'

THEN a 'Create Renewal Opportunity' button will be visible.

A/C 3 - Update 'Create Renewal' Screen

WHEN a user clicks on the 'Create Renewal Opportunity' button

THEN the existing *Create Renewal* screen will display (below)

AND the 'Renewed From' field will be prepopulated as follows:

- Populate with the Opportunity that is saved on the **contract** record which meets the following criteria:
 - The contract is linked to the current *Tenancy*, and
 - The contract's *Tenancy Status* is 'Activated'

AND *Renewed From* is required in order to continue.

The screenshot shows the 'Create Renewal' dialog box. It includes fields for 'Opportunity Name' (marked with an asterisk), 'Renewed From' (set to 'RENEWAL COS- 910 Torrens- 14/01/2023'), 'Close Date' (with a calendar icon), 'Tenancy Type' (set to 'Renewal'), and an 'Agreement Type' section. The 'Available' list in the 'Agreement Type' section contains 'AST', 'AST (Affordable)', 'Non-Housing (Company)', 'Live Work', and 'Parking Licence'. The 'Chosen' list is currently empty. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

A/C 4 - Create Renewal Opportunity

WHEN a user successfully selects 'Save' on the *Create Renewal* screen above

THEN a new renewal opportunity will be created from the 'Renewed From' opportunity as per the existing 'Create Renewal' Quick Action functionality, including:

- Prepopulating opportunity details, including:
 - Populating the **Tenancy** field on the new renewal opportunity with the 'Renewed From' opportunity's **Tenancy**, as per <https://graingerplc.atlassian.net/browse/CJR-109>
- Creating an offer & offer line item
- Creating opportunity contact roles
- Creating new RTR records and tasks where required, as per <https://graingerplc.atlassian.net/browse/RTR-59>

Opportunity Action Create Renewal

[Predefined Field Values \[10\]](#)

Action Detail		View Layout	Object Name	Opportunity
Standard Label Type	Label	Name	Action Type	Create a Record
		Create_Renewal	Relationship Field	Renewed From
Description		Create a Renewal BSS-84 - Add PMS Reference field CJR-109 - Add Tenancy field		
Target Object	Opportunity		Icon	
Record Type	Residential_Opportunity			
Create Feed Item	<input checked="" type="checkbox"/>			
Success Message			Modified By	Open box 18/02/2025, 12:50
Created By	David Picksley, 20/07/2020, 16:44			

[View Layout](#)

Predefined Field Values

Action	Field Name	API Name	Field Type	Value
Account Name	AccountName	Accountid	Lookup	Opportunity AccountId
Advance Payment Exempt	Advance_Payment_Exempt__c	Advance_Payment_Exempt__c	Checkbox	true
Exempt from Referencing	Exempt_from_Refrencing__c	Exempt_from_Refrencing__c	Checkbox	true
Move in Monies Exempt	Move_in_Monies_Exempt__c	Move_in_Monies_Exempt__c	Checkbox	true
Move-In Date	Move_In_Date__c	Move_In_Date__c	Date	Opportunity.Tenancy_End_Date__c + 1
Parent Opportunity	Parent_Opportunity__c	Parent_Opportunity__c	Lookup	Opportunity Id
PMS Reference	PMS_Reference__c	PMS_Reference__c	Text	Opportunity PMS_Reference__c
Stage	StageName	StageName	Picklist	Post Viewing
Tenancy	Tenancy__c	Tenancy__c	Lookup	Opportunity.Tenancy__c
Tenancy Type	Tenancy_Type__c	Tenancy_Type__c	Picklist	Renewal

Implementation Approach

- Create a new screen flow that recreates the existing quick action logic.

Comments

Comment by Helen Douglas-Teggart [10/Apr/25]

A/C 1 - pass

A/C 2- pass

A/C 3 - error message :- tenancy is activated

[00039046 | Tenancy | Salesforce|https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Contract/800Pv00000FtDDAIa3/view]

Important Shared D... Customer Analytics... UPDATED Lease End... Grainger homes MAP STAGING SF

Sandbox: UAT | Log out

Grainger PLC Home Leads Accounts Contacts Tenancies Opportunities Blocks Buildings

Tenancy Sarah Gifford

Latest Contract Start Date: 10/03/2026

Tenancy End Date: 10/03/2026

Actual Move Out Date:

[Create End of Tenancy](#)

Arrears ⓘ GPLC Notice Initiated

Additional Information

Unit: Apt 509, Abbeville Apts, 37 London Rd, Barkin

Uplift %: 4.00%

Previous Rent: ⓘ

Break Clause: No Break

Special Clauses: ⓘ

Description: AST

Live Work Clause: ⓘ

Special Clause Free Tex: ⓘ

Create Renewal Opportunity

YOUR FLOW FINISHED

System Information

PMS Reference: 122486079001

Record Type: Residential Tenancy

Tenancy: ⓘ

Last Modified By: Open box, 10/04/2025, 09:48

Record Number: ⓘ

Status: ⓘ

Created By: ⓘ

Comment by Sarah Jessiman [15/Apr/25]

Helen Douglas-Teggart this could be because the related contract on this tenancy is in "Draft" status.

The contract needs to have record status = Activated for us to successfully create a renewal opp on the tenancy.

Tenancy Sarah Gifford

Create End of Tenancy Create Rel...

Record Type: Residential Tenancy	Agreement Type: AST	Unit: Apt 509, Abbeville Apts, 37 London Rd, Barkin	Start Date: 11/03/2025	Tenancy End Date: 10/03/2026
----------------------------------	---------------------	---	------------------------	------------------------------

Details Related Tenants

Contracts (1)

1 item • Sorted by Record Number • Filtered by Record Type • Updated 2 minutes ago

Record Number ↑	Tenancy Ty...	Start Date	End Date	Record Sta...	Opportunity
1 00038889	New	11/03/2025	10/03/2026	Draft	GREP-CoA Bailey Sarian - Apt 509, Abbeville Apts, 37 London Rd, Barkin

[View All](#)

Comment by Helen Douglas-Teggart [28/Apr/25]

Thanks Sarah Jessiman this works in this situation but we're having errors completing the renewal.

We can't close won the opportunity on a standard renewal with no changes to the tenants: it works up to this point with the integration working correctly too.

GREP-CoA Mr Bilkan Ince, Miss Cristina Villena Munoz - 418, Solstice Apts, Sibury Boulevard

Offered: 28/04/2025 | Tenancy End Date: 28/04/2025 | Agreed Terms: 12 Months | Agreed Unit: 418, Solstice Apts, Sibury Boulevard | Rent: £1,400.00

Offers (1)

Offer Number	Offer Name	Status	Rent	Unit	Term	Move in (St...)	Move in (E...)
00085580	418, Solstice Apts, Sibury Boulevard - 12 Months	Accepted	£1,400.00	418, Solstice Apts, Sibury Boulevard	12 Months	28/04/2025	28/04/2025

Agreements (0)

Details **Related**

Opportunity Name: GREP-CoA Mr Bilkan Ince, Miss Cristina Villena Munoz - 418, Solstice Apts, Sibury Boulevard
Account Name: Bilkan Ince
TFT / Renewal User: Close Date: 08/06/2025

Activity **Chatter**

Filters: All time • All activities • All types

No activities to show. Get started by sending an email, scheduling a task, and more.

When completing a renewal with a COS - we're getting an error on adding contact roles but can't see the reason for the fail:-

RENEWAL 421 Solstice 28/04/2025

Agreements (0)

Contact Roles (1)

Contact	Role	Active	Other
Lainy Tester	Tenant	<input checked="" type="checkbox"/>	

Add Contact Roles

PRIMARY CONTACT (OPTIONAL)

Solario Roberts

Can't save records with errors.
+ Item 1 has errors in these fields: Contact.

RENEWAL 421 Solstice 28/04/2025

Agreements (0)

Contact Roles (1)

Contact	Role	Active	Other
Dan Burn	Tenant	<input checked="" type="checkbox"/>	

Add Contact Roles

PRIMARY CONTACT (OPTIONAL)

Solario Roberts

Can't save records with errors.
+ Item 1 has errors in these fields: Contact.

The screenshot shows a Salesforce Lightning page for an opportunity named "Renewal 421, Solstice Apt - 12/08/2024". A modal window titled "Add Contact Roles" is open, listing a contact named "Levin Hall" with a role of "Tenant". Below the modal, a red error box displays the following message:

Can't save records with errors.
Error 1 has occurred: OpportunityContactRole trigger execution of AfterInsert caused by System.DmlException: Update failed. First exception on row 0 with id 000F000000G3gkfAB: first error: FIELD_CUSTOM_VALIDATION_EXCEPTION, Please create a renewal from the associated tenancy.:Renency_c1 (0) triggerName:OpportunityContactRole triggerLine 7, column 1

We're also getting another error here:

The screenshot shows a Salesforce Lightning page for an opportunity named "GREP-CoA Jules Kegeleers & Pere Garriga Sánchez - 422, Solstice Apts, Silbury Boulevard". A red error banner at the top right states: "You encountered some errors when trying to save this record. Please ensure 'Tenancy End Date' is populated on the related Li...".

The opportunity details section includes:

- Account Name: Pere Sanchez
- Contract Start Date: 28/04/2025
- Tenancy End Date: (Missing)
- Agreed Terms: 12 Months
- Agreed Unit: 422, Solstice Apts, Silbury Boulevard
- Rent: £1,500.00

The "Offers" section shows one offer:

	Offer Number	Offer Name	Status	Rent	Unit
1	<input type="checkbox"/> 00085582	422, Solstice Apts, Silbury Boulevard - 12 Months	Accepted	£1,500.00	422, Solstice Apts, Silbury Boulevard

[View All](#)

The "Agreements" section shows zero agreements.

The "Details" tab is selected in the opportunity header. The details include:

- Opportunity Name: GREP-CoA Jules Kegeleers & Pere Garriga Sánchez - 422, Solstice Apts, Silbury Boulevard
- Opportunity Owner: Lacey Urwin
- Second Opportunity Owner: (Missing)
- TPT / Renewal User: (Missing)
- Close Date: 08/06/2025

Comment by Sarah Jessiman [29/Apr/25]

Helen Douglas-Teggart Hi Helen - thanks for the feedback.

1. "We can't close won the opportunity on a standard renewal with no changes to the tenants: it works up to this point with the integration working correctly too."

This record seems to be one of the migrated tenancies which we are currently working on a fix due to end date issues. In the mean time you can try retest with this rec

2. "When completing a renewal with a COS - we're getting an error on adding contact roles but can't see the reason for the fail"

If you click on the block that is highlighted red then it should expand on the reason for that error. This error was firing due to **'Cannot add a new Contact Role after the Opportunity Stage is 'Move in Monies'**

The screenshot shows the Grainger PLC Salesforce interface. On the left, there's a navigation bar with 'Grainger PLC' and links for Home, Leads, Accounts, and Contacts. Below that, an 'Opportunity' record for 'RENEWAL 421 Solstice 28/04/2025' is displayed. Under 'Offers (1)', there's one item with Offer Number 00085581 and Offer Name '421, Solstice Apts, Silbury Boulevard - 12 Mo'. Under 'Agreements (0)', there's a 'Contact Roles (1)' section. The 'Related' tab is selected. It shows a table with one row for 'Beatriz Ribeiro' with 'Role' set to 'Lead Tenant'. A red box highlights the error message 'Cannot add a new Contact Role after the Opportunity Stage is 'Move in Monies''. The 'Add Contact Roles' screen is also visible, showing a table with columns for Contact, Role, Active, and Other. A row for 'Dan Burn' is selected, and the 'Role' column shows 'Tenant'.

1. "We're also getting another error here"

When the Opportunity meets this criteria then this validation is fired:

- Tenancy Type on Opp = Renewal
- Tenancy field is empty

To avoid this validation firing we need to ensure we create a the Renewal Opp from the Tenancy screen and not via the New button.

Here is a record that has a renewal created via the Tenancy: <https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Opportunity/006Pv00000G58zqlAB/view>

Please reach out if you have any further questions

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

[CJR-118] Create & Update Tenancy Contact Roles from Qube [Grainger] Created: 20/Feb/25 Updated: 01/May/25

Status:	To Do
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Venkat Ag
Resolution:	Unresolved	Votes:	0
Labels:	GREP, OpenBox, Salesforce, UAT		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		

Original estimate:	Not Specified		
Attachments:			
Issue links:	Blocks is blocked by CJR-494 Qube Occupier Types are not correctly... To Do is blocked by CJR-45 Users can see Tenancy & Tenancy Conta... Done is blocked by CJR-180 Add External ID to Tenancy Contact Role Done Relates relates to CJR-47 Data Migration - Create Tenancy for a... Done relates to CJR-127 Remove Tenancy Contact Roles updates ... Done relates to CJR-391 Add Successor & POA Contact Roles Done		
Grainger Testing:	Fail		
Story point estimate:	0		
Sprint:	CJR Sprint 3, CJR GREP		
Rank:	2 j01ioj:		

Description

Grainger to add integration to add / update tenancy contact roles in Salesforce based on current Qube data, on a daily basis.

Acceptance Criteria - Daily Tenancy Contact Role Import [Grainger to do]

GIVEN a Salesforce **Contract** record has a *record type* of 'Residential Tenancy'

AND the Contract.PMS_Reference__c maps to a Qube Tenancy ID

WHEN the tenant details are created or updated in Qube

THEN the *Tenancy_Contact_Rolec* object will be updated:

- Where there is a *child tenant* record in Qube that does not have a corresponding *tenancy contact role* record in Salesforce: A new *Tenancy_Contact_Rolec* record will be created in Salesforce
- Where there is a *child tenant* record in Qube that has a corresponding *tenancy contact role* record in Salesforce: The *Tenancy_Contact_Rolec* record will be updated with any changes.

Tenancy_Contact_Role_c Field	Populate from Qube
Tenancy__c	Salesforce ContractID where Contract.PMS_Reference__c = Qube Tenancy ID
Contact__c	Salesforce ContactID that maps to the Qube child tenant; i.e. tenant-reference
Start_Date__c	Commenced Date
End_Date__c	Terminates Date
Role__c	Qube Occupier Type maps to Salesforce Role as per the table below
External_Id__c	<PMS Reference Number>_<Salesforce Contact Id> - e.g. 103385001006_003Nz0000053rg3IAA

Qube Occupier Type	Canonical	Maps to: Salesforce Tenancy Contact Role
Lead Tenant	Lead Tenant	Lead Tenant
Tenant, null or "-"	Sub Tenant	Tenant
Additional occupier	Permitted Occupier	Permitted Occupier
Guarantor	Guarantor	Guarantor
Alternative contact	Relevant Person	Relevant Person
successor reg		Successor (Regulated)
Successor Assd Per		Successor (Assured Periodic)
POA		Power of Attorney

Comments

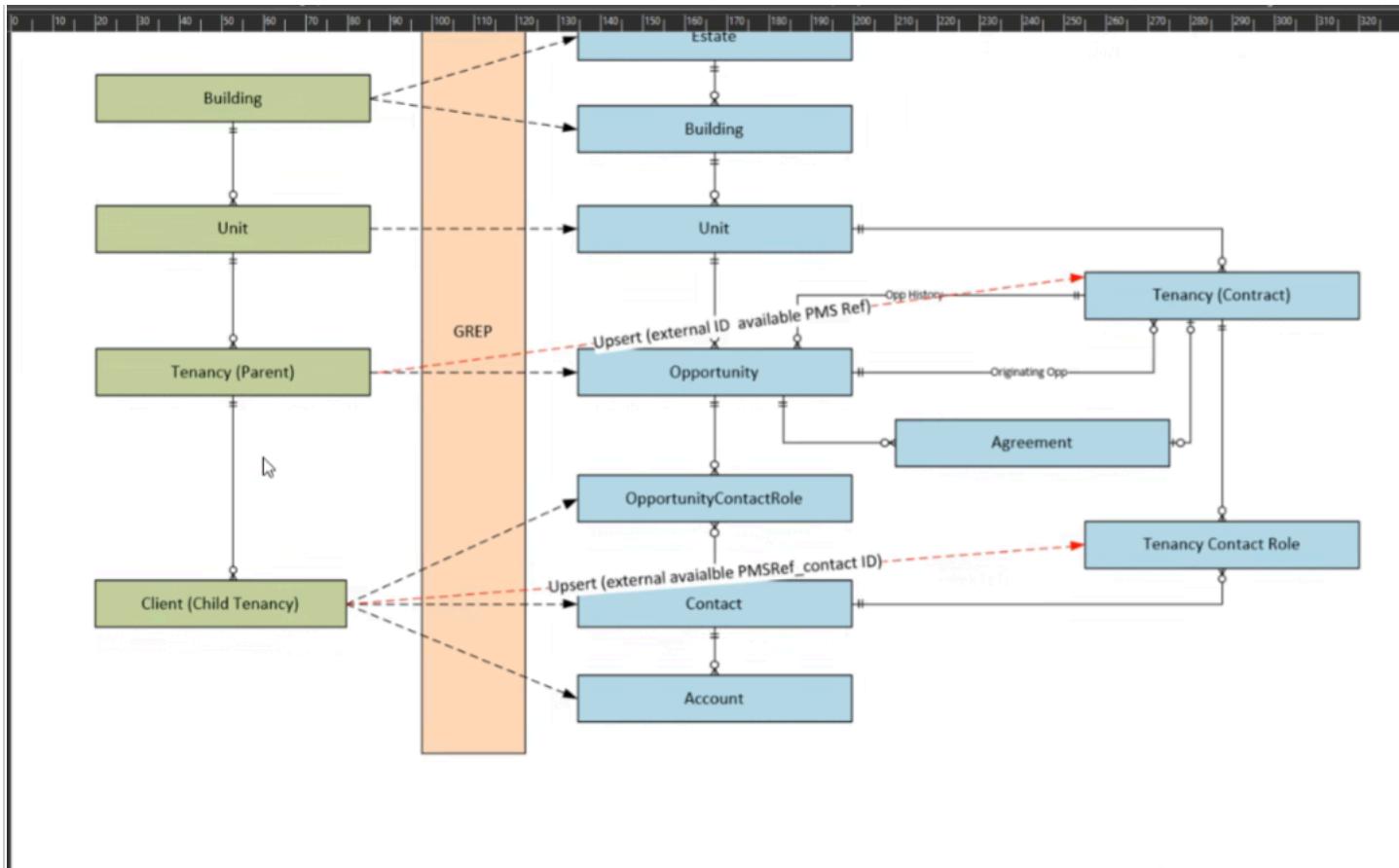
Comment by [Sam Duncan](#) [04/Mar/25]

Hi Nikki I had a call with Jaic and Valorem Reply on the integration. We agreed that the integration would upsert Tenancy records (using PMS reference as external id) Number>_<Salesforce Contact Id> - e.g. 103385001006_003Nz0000053rg3IAA

When you get a chance please can you create (or update) a user story to cover the creation of a new field on the Tenancy Contact Role object which should be as below:
label: External Id

type text (255 characters), external Id, Unique,

FLS: editable by GREP and visible to GEN-COntract permission set.



Comment by Nikki [05/Mar/25]

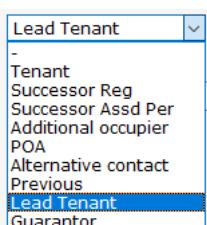
Story added: <https://graingerplc.atlassian.net/browse/CJR-180>

Comment by Sam Duncan [12/Mar/25]

Jaic George as discussed, this integration should have the ability to do a "Bulk load" where we can do an initial load into Salesforce to upsert all active tenancies and t

Comment by Jaic George [17/Mar/25]

Nikki Do we need to map anything to Salesforce for this additional Occupier type in Qube



Comment by Nikki [17/Mar/25]

Hi Jaic George I don't think we need to import the successors or POA, unless you disagree?

Can we just leave the Salesforce role unchanged if someone changes to "Previous"? I assume there would also be an end date populated as well, so we can easily detect this.

Comment by Deborah Stein [31/Mar/25]

Jaic George Nikki

There are currently circa 11k active tenants where the occupier type is not populated in Qube.

How will the data migration handle these tenants/contacts where there is data missing in Qube and the Qube occupier type > SF Tenancy contact role cannot be adopted?

Thanks

Deb

Comment by Deborah Stein [31/Mar/25]

Jaic George Nikki please note that there are also circa 12k tenants with a status of previous on current tenancies that do not have a SFDC contact id entered in Qube opportunity/tenancy

Comment by Sam Duncan [31/Mar/25]

Jaic George Deborah Stein Sam Duncan

Based on Deb's comment below that occupier type is not always populated in Qube, I'd suggest we update our mapping table as below. This mapping table would be

Qube Occupier Type	Canonical	Maps to: Salesforce Tenancy Contact Role
Lead Tenant	Lead Tenant	Lead Tenant
Tenant	Sub Tenant	Tenant
Additional occupier	Permitted Occupier	Permitted Occupier
Guarantor	Guarantor	Guarantor
Alternative contact	Relevant Person	Relevant Person
Any other value, including Blank		Other

Comment by Deborah Stein [02/Apr/25]

Sam Duncan Hi Sam : only comment is that this might be out of kilter with what is being mapped in other systems. For example, in Evolution there must be a lead tenant mapped to Evolution, AXIS, Proactis and Spike systems.

Thanks

Deb

Comment by Deborah Stein [03/Apr/25]

Sam Duncan Here is the logic currently used when the Qube data is passed to Salesforce:

Comment by Jaic George [03/Apr/25]

Deborah Stein i tested this scenario yesterday in SIT and it is creating as tenant in Salesforce , so we wont be making any changes in the integration

<https://graingerplc--sit.sandbox.lightning.force.com/lightning/r/Contract/800Pv00000FmFtmIAF/view>

Tenancy Contact Roles (1)

1 item • Updated a few seconds ago

<input type="checkbox"/> Contact ID	<input type="checkbox"/> Role
1 <input type="checkbox"/> Alexandra Claire Ear	Tenant

[View All](#)

Comment by Deborah Stein [08/Apr/25]

Jaic GeorgeNikki

For Tenancies where the Tenure is "regulated" then the tenant may have an occupier type of "successor reg".

For tenancies where the tenure is Assd per (assured periodic) , the tenant may have the occupier type of "Successor Assd Per".

We also have "tenants" listed in Qube as POA (Power of Attorney)

As we are now passing all of the tenants to Salesforce including the Regulated and Assured Periodic in order to see a SVOT, should we not be capturing these contacts?

The mapping table above did not include them because we have never set up tenancies for these tenure types on Salesforce until now.

We also have an occupier type of Previous in Qube which identifies when a tenant has left the tenancy. I am assuming that a contact is deactivated in Salesforce if the occupier type to identify old tenants for the tenancies that pass from Qube to Salesforce ? Please can you confirm.

Thanks

Deb

Comment by Nikki [09/Apr/25]

Hi Deborah Stein , we can add new tenancy contact role options to Salesforce:

- Successor (Regulated)
- Successor (Assured Periodic)
- Power of Attorney

With regards to the "Previous" tenants - yes, you are correct. We will determine whether someone has moved out based on the End Date populated by Qube. We would

cc Jaic George , Jacob Smycz

Comment by Deborah Stein [10/Apr/25]

Jaic George once Open Box have added the new contract role to salesforce, could you update GREP mapping table to include the 3 new roles and I will test this early

Thanks

Deb

Comment by Deborah Stein [30/Apr/25]

I've re opened this ticket because the test failed due to the new occupier types not being added to the GREP mapping table-see linked ticket [CJR-494](#) TO DO

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

↳ [CJR-111] Users cannot edit Tenancy and Parent Opportunity fields on Opportunity Created: 18/Feb/25 Updated: 02/May/25 Resolved:

26/Feb/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Sam Duncan	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, Prod_Approved, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:														
Issue links:	Blocks is blocked by CJR-56 Add Tenancy to Opportunity Done is blocked by CJR-114 Stewart Blackford does not see 'Creat... Done Relates relates to CJR-107 Validation Error for Renewal Opportunity Done relates to CJR-123 Create a New License from an Opportun... Done relates to CJR-122 Create a Tenancy for a Decant Agreement Done													
Sub-tasks:	<table border="1"> <thead> <tr> <th>Key</th> <th>Summary</th> <th>Type</th> <th>Status</th> <th>Assignee</th> </tr> </thead> <tbody> <tr> <td>CJR-150</td> <td>QA</td> <td>Subtask</td> <td>Done</td> <td>Mudzunga Khonani Davhana</td> </tr> </tbody> </table>				Key	Summary	Type	Status	Assignee	CJR-150	QA	Subtask	Done	Mudzunga Khonani Davhana
Key	Summary	Type	Status	Assignee										
CJR-150	QA	Subtask	Done	Mudzunga Khonani Davhana										
Story point estimate:	1													
Sprint:	CJR Sprint 1													
Rank:	2 j0193g:8i													

Description

Tenancy and Parent Opportunity fields should be read only on *opportunity* page layout

When creating a new opp from "New" button on opportunity tab, users should not be able to edit the tenancy or parent opp fields. These will be automatically set for renewals and licenses when they use the "Create Renewal" or "Create License" button on the opp page layout.

Implementation approach:

Make fields read only on opp page layout

Check if Tenancy field can be made read only for all permission sets (i.e. check if quick action field can still work)

Comments

Comment by [Anjali Salecha](#) [19/Feb/25]

Hi [Mudzunga Khonani Davhana](#) , the PMS Reference and Tenancy fields are read only for users. Edit permission not needed for 'Create Renewals'

Comment by [Mudzunga Khonani Davhana](#) [19/Feb/25]

Hi [Anjali Salecha](#) , Parent Opportunity is not editable. Are you putting it on hold because of <https://graingerplc.atlassian.net/browse/CJR-56> AC2?

← C https://graingerplc--qa.sandbox.lightning.force.com/lightning/r/Opportunity/006TA00000CznWNYAZ

Import favourites | Open Box Intranet ... | Activity Feed - Team... | My Dashboard | Azure DevOps | ABN AMR

Logged in as Stewart Blackford (sblackford@graingerplc.co.uk)

Search...

Grainger PLC Home Leads Accounts Contacts Opportunities Tenancies

Opportunity Test with Nadia

Test with Nadia		Open box
Account Name		Second Opportunity Owner
Test 1		TPT / Renewal User
Stage		Close Date
Move in Monies		2/11/2025
Sub Stage		Lead Source
		Adverse Credit?
Tenancy Type		Household income at least 30x rent
Renewal		Is Guarantor Required
Agreement Type		Number of occupants
AST		Opt out of Green Lease
Parent Opportunity		Suppress Automated Renewal Chase Emails
Test Residential		
Tenancy		
00043939		
Processed By GREP		
Not Processed		

Comment by Anjali Salecha [20/Feb/25]

Hi Mudzunga Khonani Davhana , yes we need confirmation on <https://graingerplc.atlassian.net/browse/CJR-56> from Nikki and Sam Duncan

Comment by Sam Duncan [20/Feb/25]

Will discuss with Nikki today

Comment by Nikki [20/Feb/25]

Jacob Smycz , should users be able to link an opportunity for a new decant agreement to an existing tenancy?

Comment by Jacob Smycz [20/Feb/25]

Hi Nikki yes they should be able link an opportunity for a new decant to an existing tenancy. Grainger are talking about having a 'Decant' process which would go thro

Comment by Mudzunga Khonani Davhana [24/Feb/25]

Hi Anjali Salecha , am sending this one back to you as no changes were made to make Parent Opportunity read only. I believe it has been decided that it should be re

Comment by Anjali Salecha [24/Feb/25]

Hi Jacob Smycz , this issue is happening because user Stewart Blackford had edit permission on the fields:

1. Parent Opportunity
2. Tenancy

The permission set group assigned to user is - Renewal Negotiator.

The 'Renewal Negotiator' permission set group has a permission set called 'PS_Renewals CRUD' which is providing edit access to both the above fields.

Assigning this one to you so that permissions can be updated to read only on above two fields.

Following are other permission sets giving edit access to above fields. Not sure if we need to remove permissions from everywhere.

- PS_Commercial_Lettings CRUD
- PS_Customer_Service_Advisor CRUD
- PS_Residential_Lettings CRUD
- PS_Renewals CRUD
- PS_Tenancy_Progression CRUD

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

↳ [CJR-109] Link renewal opportunity to tenancy Created: 18/Feb/25 Updated: 02/May/25 Resolved: 24/Feb/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Sam Duncan	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, Prod_Approved, REFINED, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:			
Issue links:	Blocks blocks CJR-119	Create a Renewal from a Tenancy	Done
	Relates relates to CJR-107	Validation Error for Renewal Opportunity	Done
	relates to CJR-199	UAT - J HOWE - Can't see renewal button	Done
Sub-tasks:	Key	Summary	Type
	CJR-121	QA2	Subtask
Story point estimate:	2		Status
Sprint:	CJR Sprint 1		Assignee
Rank:	2 j0193h:0001		

Description

AC 1:

Given a user is on the Opportunity page with record type of "Residential Opportunity" click on the "Renewal" button

When a user clicks on the "Renewal" button and successfully creates the renewal opportunity.

Then the newly created opportunity must be linked to the tenancy via the Opportunity.Tenancy__c field.

Implementation Approach

Add predefined value to quick action as below

SETUP **Object Manager**

Opportunity Action Create Renewal

[Predefined Field Values \[9\]](#)

Action Detail			
Label	Create Renewal	Object Name	Opportunity
Standard Label Type		Action Type	Create a Record
Name	Create_Renewal	Relationship Field	Renewed From
Description	Create a Renewal	Icon	
Target Object	Opportunity		
Record Type	Residential Opportunity		
Create Feed Item	<input checked="" type="checkbox"/>		
Success Message			
Created By	David Picksley, 20/07/2020, 17:44	Modified By	Open box, 17/02/2025, 15:01
		Edit Delete Edit Layout	Edit Delete Edit Layout

Set Tenancy__c = Opportunity.Tenancy__c

Predefined Field Values		New		
Action	Field Name	API Name	Field Type	Value
Edit Del	Account Name	AccountId	Lookup	Opportunity.AccountId
Edit Del	Advance Payment Exempt	Advance_Payment_Exempt__c	Checkbox	true
Edit Del	Exempt from Referencing	Exempt_from_Refencing__c	Checkbox	true
Edit Del	Move in Monies Exempt	Move_in_Monies_Exempt__c	Checkbox	true
Edit Del	Move-in Date	Move_In_Date__c	Date	Opportunity.Tenancy_End_Date__c + 1
Edit Del	Parent Opportunity	Parent_Opportunity__c	Lookup	Opportunity.Id
Edit Del	PMS Reference	PMS_Reference__c	Text	Opportunity.PMS_Reference__c
Edit Del	Stage	StageName	Picklist	Post Viewing
Edit Del	Tenancy Type	Tenancy_Type__c	Picklist	Renewal

Adjust existing renewals batch class to set same value on newly created renewal opportunities

Add lookup filter to Opportunity.Tenancy__c

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[▼ Hide Filter Settings](#)

Filter Criteria	Insert Suggested Criteria	Clear Filter Criteria
Field	Operator	Value / Field
Tenancy: Contract Record Type	equals	Value <input type="text" value="Residential Tenancy"/>
AND	Value / Field	<input type="text"/>
Begin typing to search for a field...	--None--	Value <input type="text"/>
Add Filter Logic...		

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

[\[CJR-94\] Update field label on Agreement](#) Created: 12/Feb/25 Updated: 02/May/25 Resolved: 20/Feb/25

Status:	Done		
Project:	Customer Journey - Renewals Project		
Components:	None		
Affects versions:	None		
Fix versions:	Sprint 2		
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube		

Type:	Story	Priority:	Priority 3
Reporter:	Sam Duncan	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, Prod_Approved, REFINED, UAT		

Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Sub-tasks:	Key	Summary	Type	Status
	CJR-120	QA2	Subtask	Done
Story point estimate:	0.25			
Sprint:	CJR Sprint 1			
Rank:	2 j0193h:0004			

Description

A/C 1

Given a user is on the opportunities page with a Record Type of "Residential Opportunity"**When** the user navigates to Agreements**Then** the field label on agreements should be updated from "Tenancy" to "Contract."

The screenshot shows the Grainger PLC Opportunities page. A specific opportunity record is selected, titled "Test Agreement link". The record details include:

- Account Name: Jacob saji test
- Move-In Date: 12/02/2025
- Tenancy End Date: 11/02/2027
- Agreed Terms: 24 Months
- Agreed Unit: 44, Kettlebaston Road, Leyton, London
- Rent: £0.00

Below the record details, there is a section for "Offers (1)" which lists one offer entry:

Offer Nu...	Offer Name	Status	Rent	Unit	Term
1	00084398	Presented	£0.00	44, Kettlebaston Road, Leyton, London	24 Month

At the bottom of the screenshot, there is a red arrow pointing to the word "Tenancy" in the "Offers" table header, with the text "Change field label to 'Contract'" written above it.

Agreements (1)

1 item · Sorted by Created Date · Updated 2 minutes ago

Agreement Name	Document T...v	Agre...
AST 2020 - 00038266	00038266	AST

I/A

remove translation workbench as below

Setup Home Object Manager

transl

SETUP Override

Package: Adobe Acrobat Sign Language: English Setup Component: Custom Field Object: Agreement Aspect: Field Label

Master Field Label	Field Label Override
Account	
Additional Options	
Additional Recipient 1 (Contact)	
Additional Recipient 1 (Lead)	
Additional Recipient 1 (User)	
Additional Recipient 2 (Contact)	
Additional Recipient 2 (Lead)	
Additional Recipient 2 (User)	
Additional Recipient 3 (Contact)	
Additional Recipient 3 (Lead)	
Additional Recipient 3 (User)	
Additional Recipients (Email)	
Agreement Status	
Agreement Type	
Attachment ID Order	
Attachment Service Invocation Count	
Attachment Workflow Index	
Auto Update	
Background Action	
Cancel Delete Reason	
Contract	
Tenancy	Tenancy

remove

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

[CJR-77] Set Record Type on Creating a New Contract Created: 29/Jan/25 Updated: 02/May/25 Resolved: 14/Feb/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	Dev_Reviewed, OpenBox, Prod_Approved, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Issue links:	Relates			
	relates to	GJR-04	"Tenancy field" missing on the Reside...	Done
	relates to	GJR-02	Flow Error when trying to create a re...	Done
Sub-tasks:	Key	Summary	Type	Status

	CJR-90	QA	Subtask	Done	
	CJR-168	QA2	Subtask	Done	
Story point estimate:	1				
Sprint:	CJR Sprint 1				
Rank:	2 j0193h:009				

DescriptionA/C 1 - Set Record Type when creating Residential TenanciesGIVEN an opportunity has the *Record Type* 'Residential Opportunity'

WHEN a new contract record is created from the opportunity/agreement per the existing process

- Either on generating a contract for signing
- When creating an End of Tenancy from the Unit screen

THEN the contract record will be created with a *record type* of 'Residential Contract'.

Please note the process for creating a Commercial Contract & set the record type is handled here:

<https://graingerplc.atlassian.net/browse/CLTL-9>A/C 2 - Prepopulate Tenancy ID on Mid-Term ContractsGIVEN an opportunity has the *Record Type* 'Residential Opportunity'AND the opportunity's *Tenancy Type* is not 'New'WHEN a new *Contract* record is created from the opportunity/agreement per the existing processTHEN the *Tenancy* field on the new *Contract* record will be populated with the *Tenancy* on the opportunity record.**Comments**

Comment by Nikki [29/Jan/25]

Akshat Jain I have added this story; this A/C was in the CLTL project's next sprint!

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)[↳ \[CJR-71\] Update Tenant Contact Details displayed on the Unit](#) Created: 28/Jan/25 Updated: 22/Apr/25 Resolved: 11/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	Dev_Reviewed, OpenBox, REFINED, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:																
Issue links:	Relates relates to CLTL-26 Create Tenant, Tenant Contact & Guara... Done															
Sub-tasks:	<table border="1"> <thead> <tr> <th>Key</th><th>Summary</th><th>Type</th><th>Status</th><th>Assignee</th></tr> </thead> <tbody> <tr> <td>CJR-197</td><td>QA2</td><td>Subtask</td><td>Done</td><td>Nadia Swarts</td></tr> <tr> <td>CJR-198</td><td>QA2</td><td>Subtask</td><td>Done</td><td></td></tr> </tbody> </table>	Key	Summary	Type	Status	Assignee	CJR-197	QA2	Subtask	Done	Nadia Swarts	CJR-198	QA2	Subtask	Done	
Key	Summary	Type	Status	Assignee												
CJR-197	QA2	Subtask	Done	Nadia Swarts												
CJR-198	QA2	Subtask	Done													
Grainger Testing:	Pass															
Story point estimate:	2															
Sprint:	CJR Sprint 2															
Rank:	2 j01db3:															

Description

Unit 28 Poppy Apartments, E16 2YH

Building Poppy Apartments, 11 Millet Place, London E16	Block GT - Poppy Apts	Unit Status Tenanted	Bedrooms 2 Bedrooms	Bathrooms 1	Priority Flag
---	--------------------------	-------------------------	------------------------	----------------	---------------

Unit Details Lettings And Marketing Property Management **Tenants Contact Details** Key Documents Related

Tenant Full Name:
Shahina Begum
Sufyan Secretary

Phone / Mobile:
1234567890 / 1234567890
1234567890 / 1234567890

Email:
shahinabegum96@0034j00000a4elfqayadd.invalid
sufyan.secretary@0034j00000a4ecbqayadd.invalid

A/C 1 - Add Role to *Tenants Contact Details*

WHEN a user views the 'Tenants Contact Details' screen for the unit

THEN the 'Tenant Full Name' field will be renamed "Full Name"

AND a new column "Role" will be displayed before full name.

A/C 2 - Update Tenants Contact Details displayed for a Residential Unit

GIVEN a unit has a record type that is not 'Commercial_Unit'

WHEN a user views the 'Tenants Contact Details' screen for the unit

THEN the contact details will display for any/all **contacts** that meet the following criteria:

- If there is a **contract** record
 - Where the *record type* is 'Residential Tenancy'
 - And the *Unit* is the unit being viewed
 - And the *Tenancy Status* is 'Activated'
- Then identify any linked **tenancy contact role** record(s) where the *End Date* is null

A/C 3 - Update Tenants Contact Details displayed for a Commercial Unit

GIVEN a unit has a record type that is 'Commercial_Unit'

WHEN a user views the 'Tenants Contact Details' screen for the unit

THEN the contact details will display for any/all contact(s) that meet the following criteria:

- Then identify the **Opportunity** linked to the unit
 - Where Stage is 'Closed/Won' or 'Fit Out'
 - With the latest *Tenancy End Date*
- Then identify any linked **opportunity contact role** record where *Active* = true

Comments

Comment by [Nikki](#) [05/Mar/25]

[Akshat Jain](#) A/Cs updated

Comment by [Elisabeta Mihalache](#) [11/Apr/25]

Unit 2001, 5 Capital Quarter, Tyndall St., Cardiff

Building The Copper Works - Apartments	Block Copper Works - Apartments	Unit Status On the Market Available to View	Bedrooms 1 Bedroom	Bathrooms 1
---	------------------------------------	--	-----------------------	----------------

Unit Details Lettings And Marketing Property Management **Tenants Contact Details** More ▾

Can't find a unit with active tenant contact details

Comment by [Helen Douglas-Teggart](#) [11/Apr/25]

Unit 105 North, The Forge, Newcastle, NE1 3AA					
Building	Block	Unit Status	Bedrooms	Bathrooms	Priority Flag
The Forge Apts, North, Newcastle, NE1 3AA	Forge - North Apartments	Reserved	2 Bedrooms	2	
Unit Details	Lettings And Marketing	Property Management	Tenants Contact Details	Key Documents	Related

Role: Permitted Occupier **Full Name:** a2iPv00000Cwdjy **Phone / Mobile:** 07000000014/ **Email:** lewishallnufc@graing

Found one unit with this visible but difficult to find units.

Comment by Sarah Jessiman [15/Apr/25]

Helen Douglas-Teggart Could you please clarify on the issue here? Are you needing a unit with more tenant contacts? If so there is this unit https://graingerplc--uat.sandbox.lightning.force.com/lightning/r/Unit__c/a1G4J0000025wRDUAY/view

Comment by Elisabeta Mihalache [22/Apr/25]

Unit Apt 402, Abbeville Apts, 37 London Rd, Barkin

Building	Block	Unit Status	Bedrooms	Bathrooms	Priority Flag
Abbeville Apartments, 37 London Road, Bar	Abbeville - Apartments	Reserved	3 Bedrooms	2	

Unit Details	Lettings And Marketing	Property Management	Tenants Contact Details	Key Documents	Related
Role: Lead Tenant Tenant Tenant Tenant Guarantor Lead Tenant Tenant Tenant	Full Name: Mandy-Liza Lehnert Eunice Brenya Janice Sowah Elletina Mekkaoui Eddie Howe Jelly Cat Dan Burn Lewis Hall		Phone / Mobile: 07849585331/ 07857279168/ 07950834212/ 07449046315/ 0700000009/0700000007 0700000013/0700000032 0700000015/0700000012 0700000014/		Email: mandyliza.lehnert@gr. eunice.brenya@graing janice.ayor@graingerp elletina@graingerplc.c eddiehowe@graingerp jellycat@graingerplc.o danburn@graingerplc lewishallnufc@grainge

All tenants from current tenancies display correctly on unit (unit used has two current tenancies hence the number of tenants) [402 Abbeville Apartments](#)

[See a History of Price Book Rent & ERVs \(CJR-390\)](#)

↳ [CJR-60] Identify the relevant ERVs & Price Books Created: 17/Jan/25 Updated: 02/May/25 Resolved: 29/Jan/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	See a History of Price Book Rent & ERVs

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, Prod_Approved, Refinement_Internal, SVOC, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Issue links:	Blocks blocks	CJR-31	TBD - Import / Upload ERVs into Sales...	To Do
	Relates relates to	EJR-167	Fix User Access to Price Books & Pric...	Done
	relates to	EJR-378	Add ERV Fields back to Unit	Done
Sub-tasks:	Key	Summary	Type	Status
	CJR-69	QA	Subtask	Done
	CJR-157	QA2	Subtask	Done
Story point estimate:	1			
Sprint:	CJR Sprint 1			
Rank:	2 0193h:5			

Description

Acceptance Criteria:

A/C 1 - Add Price Book Type & Date

WHEN a user is viewing a **price book** record

THEN two new fields will display:

- **Type:** Single-select picklist; optional
 - Initial values: ERV, Price Book Rent
- **Effective Date:** Optional date field
 - Help text: 1st day of the month for which the price book values are applicable.

Price Book Name	Standard Price Book	Active	<input checked="" type="checkbox"/>
Description		Is Standard Price Book	<input checked="" type="checkbox"/>
Created By	Scott Knight, 18/10/2019, 16:44	Last Modified By	Saji Gunasekaran, 04/10/2024, 14:35

A/C 2 - Hide Existing ERV fields on the Unit

WHEN a user is viewing a unit (any record type)

THEN the existing fields will no longer be visible: ERV Date, ERV, ERV MONTHLY, March 23 ERV

Building	Adlay Apartments, 3 Millet Place, London E16	Block	Adlay Apartments	Unit Status	Future Vacant	Bedrooms	3 Bedrooms	Bathrooms	2	Priority Flag
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Implementation Approach

AC1. For new fields created for AC1, create new permission set "GEN - Product Pricebook R". Add view permissions for the new pricebook fields. Add "GEN - Product R" permission set to the permission set groups below.

API Name ↑	Label	Description	Last Modified	Created	St... ↓
Asset_Manager	Asset Manager	https://graingerplc.atlassian.net/browse/SFDC-452 To...	22/01/2025, 15...	05/11/2024, 16...	Updat...
Commercial_Lettings_Team	Commercial Lettings Team	https://graingerplc.atlassian.net/browse/CLTL-16	22/01/2025, 15...	23/12/2024, 15...	Updat...
CopilotSalesforceAdminPSG	CopilotSalesforceAdminPSG		05/01/2025, 0...	30/10/2024, 02...	Updat...
CopilotSalesforceUserPSG	CopilotSalesforceUserPSG		31/10/2024, 02...	30/10/2024, 02...	Updat...
Customer_Service_Advisor	Customer Service Advisor	https://graingerplc.atlassian.net/browse/SFDC-424 To...	22/01/2025, 15...	05/11/2024, 16...	Updat...
Lettings_Manager	Lettings Manager	https://graingerplc.atlassian.net/browse/SFDC-422 To...	22/01/2025, 15...	05/11/2024, 15...	Updat...
Lettings_Senior_Negotiator	Lettings Senior Negotiator	https://graingerplc.atlassian.net/browse/SFDC-420 To...	22/01/2025, 15...	05/11/2024, 16...	Updat...
Lettings_User	Lettings User	https://graingerplc.atlassian.net/browse/SFDC-414 To...	22/01/2025, 15...	05/11/2024, 16...	Updat...
Portfolio_Manager	Portfolio Manager	https://graingerplc.atlassian.net/browse/SFDC-456 To...	22/01/2025, 15...	05/11/2024, 16...	Updat...
Property_Management_User	Property Management User	https://graingerplc.atlassian.net/browse/SFDC-457 To...	22/01/2025, 15...	05/11/2024, 16...	Updat...
PRS_Head	PRS Head	https://graingerplc.atlassian.net/browse/SFDC-455 To...	22/01/2025, 15...	05/11/2024, 16...	Updat...
Renewal_Administrator	Renewal Administrator	https://graingerplc.atlassian.net/browse/SFDC-412 To...	22/01/2025, 15...	05/11/2024, 16...	Updat...
Renewal_Manager	Renewal Manager	https://graingerplc.atlassian.net/browse/SFDC-421 To...	22/01/2025, 15...	05/11/2024, 16...	Updat...
Renewal_Negotiator	Renewal Negotiator	https://graingerplc.atlassian.net/browse/SFDC-411 To ...	22/01/2025, 15...	05/11/2024, 16...	Updat...
Report_and_Dashboard_Gr...	Report and Dashboard Gr...	https://graingerplc.atlassian.net/browse/SFDC-423 To...	05/11/2024, 16:...	16/09/2024, 2...	Updat...
Resident_Service_User	Resident Service User	https://graingerplc.atlassian.net/browse/SFDC-454 To...	22/01/2025, 15...	05/11/2024, 16...	Updat...
Resident_Services_Head	Resident Services Head	https://graingerplc.atlassian.net/browse/SFDC-453 To...	22/01/2025, 15...	05/11/2024, 16...	Updat...
Tenancy_Progression_Man...	Tenancy Progression Man...	https://graingerplc.atlassian.net/browse/SFDC-391 To...	22/01/2025, 15...	05/11/2024, 16...	Updat...
Tenancy_Progression_User	Tenancy Progression User	https://graingerplc.atlassian.net/browse/SFDC-392 To...	22/01/2025, 15...	05/11/2024, 16...	Updat...

Create new permission set "GEN - Admin". Add edit permissions for new pricebook fields. Create post deployment step to assign this permission set to all users with "admin" and "system support" profiles.

For AC2: remove FLS for Pricebook fields below from all profiles and permission (GEN - Unit R, etc) sets except sys admin profile. Also remove from page layout (and record page if dynamic forms are being used)

ERV Date, ERV, ERV MONTHLY, March 23 ERV

Comments

Comment by Sam Duncan [27/Jan/25]

Akshat Jain I've added ipmlmentation approach for permission sets etc.

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

↳ [CJR-59] Populate New 'Uplift %' & 'Security Deposit Amount' Fields on Tenancy Created: 06/Jan/25 Updated: 02/May/25 Resolved: 19/Feb/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, Prod_Approved, SVOC, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Issue links:	Blocks		
	blocks	CJR-47	Data Migration - Create Tenancy for a...
	is blocked by	CJR-45	Users can see Tenancy & Tenancy Conta...
	is blocked by	CLTL-9	Create Commercial Contracts in Sales...

	Relates				
	relates to	CJR-86	Security Deposit Amount from Commerci...		Done
	relates to	CJR-113	Fields Missing on commercial contract		Done
Sub-tasks:	Key	Summary	Type	Status	Assignee
	CJR-74	QA	Subtask	Done	Mudzunga Khonani Davhana
Story point estimate:	3				
Sprint:	CJR Sprint 1				
Rank:	2 0193h:99				

DescriptionA/C 1 - Populate New 'Uplift %' Field When Creating a New Residential ContractGIVEN an opportunity has a *Record Type* 'Residential Opportunity'WHEN the existing process runs to create a **new Contract record** for the opportunity that has the *Record Type* 'Residential Contract'

THEN the following fields will be populated on the new contract record:

Field	Populate with
Uplift %	Opportunity_r.Primary_Offer.Uplift_c

A/C 2 - Populate New 'Security Deposit Amount' Field when creating a New ContractWHEN the existing processes run to create a **new Contract record** that has the *Record Type* 'Residential Contract' or 'Commercial Contract'

THEN the following fields will be populated on the new contract record:

Field	Populate with
Security Deposit Amount	Opportunity_r.Security_Deposit_c

A/C 3 - Once-Off Data Migration to Populate New 'Uplift %' & 'Security Deposit Amount' Field

WHEN the enhancements go live

THEN all existing Contract records will be updated:

- The new *Uplift %* field will be populated with any value in the existing *Uplift* field.
- The new *Security Deposit Amount* field will be populated with any value in the existing *Security Deposit* field.

SVOT - Provide Single View of Tenancy (CJR-392)↳ [CJR-57] Users Can Easily Access Tenancies Created: 20/Dec/24 Updated: 02/May/25 Resolved: 06/Feb/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Provide Single View of Tenancy

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, Prod_Approved, SVOC, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:		
Issue links:	Blocks is blocked by CJR-45	Users can see Tenancy & Tenancy Conta... Done
	Relates relates to CJR-84	Permissions Issue Done
	relates to CJR-126	Can't drill into a tenancy from the t... Done
	relates to CJR-200	UAT - J HOWE - Query on creation of t... Done
Sub-tasks:	Key	Summary
	CJR-83	QA Subtask Done Mudzunga Khonani Davhana

Story point estimate:	1
Sprint:	CJR Sprint 1
Rank:	2 j0193h:7

DescriptionA/C 1 - Only Display Tenancies on the Unit

WHEN a user is viewing the 'Tenancies' related list for a unit

THEN the list of tenancies will be updated to only display records where *record type is 'Residential Tenancy'*

The screenshot shows a unit details page for '14, Canal House, Calverley, Leeds, LS13'. Below the unit details, there is a 'Property Management' tab which is selected. Under this tab, there is a 'Tenancies' section. The section title is 'Tenancies (3)' and it says '3 items · Sorted by Created Date · Updated a few seconds ago'. The table contains three rows of tenancy data:

Tenancy Number	Account Name	Tenancy Status	Tenancy Start Date	Tenancy End Date	Actual Move Out Date
1 00038146	Jacob Smycz	Draft	15/01/2025	14/01/2026	
2 00022518	Jacob Smycz	Ended	14/01/2023	13/01/2025	12/05/2024
3 00010953	Jonathan Howes	Draft	20/12/2021	19/12/2022	

A/C 2 - Add a Tenancy Menu Option

WHEN a user is viewing the Grainger PLC app

THEN the 'Tenancies' tab will be available after 'Opportunities'.

The screenshot shows the navigation bar of the Grainger PLC app. The tabs are: Home, Leads, Accounts, Contacts, Opportunities, and Tenancies. The 'Opportunities' tab is currently selected.

A/C 3 - Add 'All Active Tenancies' List View

WHEN a user selects the 'Tenancies' menu option

THEN a list view of 'All Active Tenancies' will be available

AND the list will display all tenancy records that meet the following criteria:

- *Record Type* is 'Residential Tenancy'
- AND *Tenancy Status* is 'Active'

AND the list view will display the following columns: Unit, Account Name, Agreement Type, Tenancy Start Date, Tenancy End Date, Tenancy Status

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)[CJR-56] Add Tenancy to Opportunity Created: 20/Dec/24 Updated: 02/May/25 Resolved: 24/Feb/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	Dev_Reviewed, OpenBox, Prod_Approved, SVOC, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Issue links:	Blocks		
	blocks	CJR-47	Data Migration - Create Tenancy for a...
	blocks	CJR-114	Users cannot edit Tenancy and Parent ...
	is blocked by	CJR-45	Users can see Tenancy & Tenancy Conta...

Relates					
relates to	CJR-84	Permissions Issue			Done
relates to	CJR-87	Tenancy field is not updated with the...			Done
relates to	CJR-128	Can't Create Tenancy as Stewart Black...			Done
relates to	CJR-137	Can't see Tenancy field on resi opp			Done
relates to	CJR-201	UAT - J HOWE - Unable to create renewal			Done
relates to	GLTL-206	Validation Error on RTR records when ...			Done

Sub-tasks:	Key	Summary	Type	Status	Assignee
	CJR-70	QA	Subtask	Done	

Story point estimate:	3
Sprint:	CJR Sprint 1
Rank:	2 j0193h:0000i

Description

A/C 1 - Add New Opportunity Fields

WHEN a user is viewing an **opportunity** with *record type* 'Residential Opportunity'

THEN the following new field will be displayed on the *Details* tab below the existing *Parent Opportunity* field:

Field	Data Type	Editable	Required	Help Text
Tenancy	Tenancy Lookup	Yes No	<< removed	No

A/C 2 - Prepopulate Tenancy for Mid-Term Opportunities << removed

WHEN a user enters or updates the *Parent Opportunity* field on an opportunity record

THEN the *Tenancy* field will be updated with the *Parent Opportunity's Tenancy* value (which may be null).

SD: We need to discuss above. I'm not sure it makes sense to set tenancy based on parent as this might cause issues when license opps are created (see <https://graingerplc.atlassian.net/browse/CJR-110>). Ideally the parent opp and tenancy fields will be set automatically when the renewal/license is created via the quick action. i.e users will never be manually editing these fields.

A/C 3 - Validation to Ensure Mid-Term Opportunities have a Tenancy

GIVEN an opportunity has *record type* 'Residential Opportunity'

AND opportunity's *Tenancy Type* is 'Renewal'

AND the *Agreement Type* is not 'Decant Agreement Normal' or 'Decant Agreement Wales' << removed

WHEN the opportunity is created or updated

THEN new validation will require the *Tenancy* field -

- Is populated, and
- The tenancy has a *record type* 'Residential Tenancy', and
- The tenancy's *Tenancy Status* is 'Activated', and
- ~~If the opportunity's Primary_Offer_Live_Unit_c is populated: The tenancy's _Unit is the same.~~ << removed

AND the following error message will display: Please create a renewal from the associated tenancy. ~~Please link the opportunity to an active tenancy for the same unit.~~ << new text

AND the *Tenancy* field will be highlighted / in focus.

Comments

Comment by [Nikki](#) [20/Feb/25]

Moved back to 'in progress'; some A/Cs removed and updated.

[SVOT - Keep Tenancies Updated & Synced with Qube](#) (CJR-393)

[CJR-55] Create/Update Tenancy from Qube [Grainger]

Created: 20/Dec/24 Updated: 17/Apr/25 Resolved: 03/Apr/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Venkat Ag
Resolution:	Done	Votes:	0

Labels:	GREP, OpenBox, SVOC, UAT		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		
Attachments:			
Issue links:	Blocks is blocked by CJR-272 Bulk data migration of existing activ... To Do is blocked by CJR-465 An activated tenancy's account can't ... To Do is blocked by CJR-129 Users can see Qube Tenancy Details Done is blocked by CJR-159 Contract/Tenancy Start Date, End Date... Done is blocked by CJR-193 Change 'Record Status' Options for Re... Done Relates relates to CJR-47 Data Migration - Create Tenancy for a... Done relates to CJR-171 Link Tenancies created to Opportuniti... Done relates to CJR-236 Tenancy Page Layout Done		
Story point estimate:	0		
Sprint:	CJR Sprint 3		
Rank:	2 j012pb:000001		

Description

Grainger to add integration to add or update current residential tenancy details from Qube into Salesforce when the record is created or updated in Qube

Acceptance Criteria 1 - Daily Tenancy Update

GIVEN a Salesforce **Contract** record has a *record type* of 'Residential Tenancy'

AND the Contract.PMS_Reference__c maps to a Qube Tenancy ID

WHEN the record is created or updated in Qube

THEN the following fields will be updated based on current Qube data:

Tenancy Details	Contract Object Field API Name	Update Based on Qube Data
Record Status	Tenancy_Status__c	One of: <ul style="list-style-type: none"> “Draft” for a future tenancy or tenancy that never came into effect “Activated” “Ended” the tenant has moved out Map Qube tenancy status to one of: Future, Current or Previous
Account Name	AccountId	
Unit	Unit__c	
Status	Status	'Activated'
Start Date	StartDate	Tenancy's original start date
Latest Contract Start Date	Latest_Contract_Start_Date__c	Unit's <i>Start Date</i>
Agreement Type		Tenure

Acceptance Criteria 2 - Create New Tenancy Record in Salesforce

GIVEN there is an tenancy in Qube for a residential unit [Including live units, parking/garage and sheds; but excluding commercial units]

AND the tenancy is active [Note: Excludes future tenancies]

AND there is no existing Salesforce **Contract** record with PMS_Reference__c = Qube Tenancy Id

WHEN the tenancy record is created or updated in Qube

THEN a new **Contract** record will be created in Salesforce, populated with the following data:

Field	Contract Object Field API Name	Populate
Record Type	RecordTypeId	'Residential Tenancy'
PMS Reference ID	PMS_Reference__c	Qube Tenancy ID
Account Name	AccountId	Same logic as as used to populate Opportunity.AccountID
Unit	Unit__c	Salesforce unit that maps to the Qube unit.
Tenancy Owner	OwnerId	GREP Integration User
Status	Status	'Activated' [or may need to be inserted as 'Draft' and updated to 'Activated' via A/C1?]
Record Status	Tenancy_Status__c	Map Qube tenancy status to one of: Future, Current or Previous
Start Date	StartDate	Tenancy's original start date
Latest Contract Start Date	Latest_Contract_Start_Date__c	Unit's <i>Start Date</i>
Agreement Type		Tenure

Comments

Comment by Nikki [24/Feb/25]

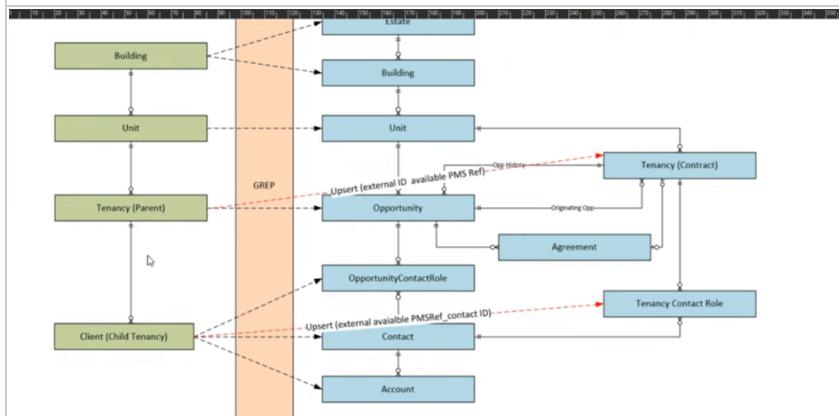
Note therefore, the following residential tenancy fields are **not updated** Qube:

Field	Editable	Comments
Tenancy Number	No	Salesforce ID
PMS Reference ID	No	Not updated after initial tenancy creation.
Record Type	No	Must never change
Status	Yes	Record status will remain 'Activated' even after the tenancy ends?
Tenancy Owner	Yes	Salesforce owner
Account Name	Yes	?
Unit	Yes	?
Tenancy Start Date	Yes	This is the original start date; Qube contains the latest contract start date only.
Actual Move Out Date	Yes	Updated from EOT.
Renewal Denied	Yes	Will be maintained in SF going forwards.
Document Type	Yes	Not aware of this being in Qube
Uplift %	Yes	Not aware of this being in Qube, in this format.
Security Deposit Amount	Yes	Will never change; previously agreed with Grainger there is no need to sync.
Break Clause	Yes	Salesforce contains more detailed break clause info than Qube; not all break clauses in SF are mapped to Qube. Unless we import additional break fields?
Tenant Break	Yes	Not aware of this being in Qube.
Landlord Break	Yes	Not aware of this being in Qube
Special Clauses	Yes	Not aware of this being in Qube
Special Clause Free Text	Yes	Not aware of this being in Qube
Live Work Clause	No	Calculated field; Not aware of this being in Qube
Vehicle Model	Yes	Not aware of this being in Qube
Vehicle Registration	Yes	Not aware of this being in Qube
Vehicle Make	Yes	Not aware of this being in Qube
Description	Yes	

Note, the following residential tenancy data is not imported from Qube:

- Current / last rent for the tenancy. [_Current rent_ and _passing/prior rent_ for the UNIT will be imported and displayed]

Comment by Nikki [05/Mar/25]



Comment by Nikki [05/Mar/25]

SD Sam Duncan March 4, 2025 at 3:56 PM Edited

Hi @Nikki I had a call with Jaic and Valorem Reply on the integration. We agreed that the integration would upsert Tenancy records (using PMS reference as external id) and would upsert Tenancy Contact Role records using an external id created by <PMS Reference Number>_<Salesforce Contact Id> - e.g. 103385001006_003Nz0000053rg3IAA

Comment by Nikki [17/Apr/25]

RE: [JIRA] (CJR-55) Create/Update Tenancy from Qube [Grainger]



Jaic George <JGeorge@graingerplc.cc>

To Nikki Papenfus

Cc Sam Duncan

Reply
Reply All
Forward

Mon 2025

(i) You replied to this message on 2025/03/17 13:08.

Hi Nikki

Qube doesn't return below information in the Qube Service to GREP

Latest Contract Term (Months)

Tenancy End Date

First Break Clause Date

Break Clause Notice (Months)

SVOT - Import Current & Passing Rent from Qube (CJR-345)

↳ [CJR-54] Users can see Passing Rent & Current Rent for a Unit Created: 19/Dec/24 Updated: 02/May/25 Resolved: 20/Mar/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Import Current & Passing Rent from Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Nadia Swarts
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, SVOC, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:											
Issue links:	Blocks blocks CJR-30 Data Migration - Upload Price Book Re... To Do blocks CJR-53 Import Passing Rent & Current Rent in... To Do										
Sub-tasks:	<table border="1"> <thead> <tr> <th>Key</th><th>Summary</th><th>Type</th><th>Status</th><th>Assignee</th></tr> </thead> <tbody> <tr> <td>CJR-184</td><td>QA2</td><td>Subtask</td><td>Done</td><td>Nadia Swarts</td></tr> </tbody> </table>	Key	Summary	Type	Status	Assignee	CJR-184	QA2	Subtask	Done	Nadia Swarts
Key	Summary	Type	Status	Assignee							
CJR-184	QA2	Subtask	Done	Nadia Swarts							
Grainger Testing:	Pass										
Story point estimate:	1										
Sprint:	CJR Sprint 2										
Rank:	2 j01dag:2										

Description

As a user, I want to see the latest passing (prior) rent & current rent for a unit, so that I do not have to check Qube for this information.

A/C 1 - Update Unit Passing Rent FieldWHEN a user is viewing the ~~unit details screen~~ Lettings and Marketing tabTHEN the *Passing Rent* [Unit.Passing_Rent__c] field will be read-only for all users

EXCEPT Grep Integration Profile AND Lettings Managers

AND the field label will be changed to: **Passing Rent (Monthly)**

AND help text will be added: Unit's previous rent.

A/C 2 - Add Unit Current Rent Field

WHEN a user is viewing the **unit details screen** Lettings and Marketing tab

THEN a new **Current Rent (Monthly)** field will be displayed below 'Passing Rent'

- Optional field
- Currency field (2 decimal places)

AND the field will be read-only

AND help text will be added: Unit's current rent.

IA

- Add fields to **property read** permission set.
- Set FLS for passing rent for Grep Integration Profile and PS_Lettings_Manager CRUD to be edit
- Set field as Editable on Page Layout

Comments

Comment by [Nikki](#) [29/Jan/25]

Hi Jacob Smycz , do you happen to know if this existing "Passing Rent" field on the unit is referring to current rent or prior rent?

I believe the data team refer to the prior rent as 'passing rent' but the Renewals team referring to current rent as 'passing rent'.

Comment by [Matthew Pitcairn](#) [04/Mar/25]

Jacob Smycz , this the correct permission based on IAs?

PS_GEN_Property_Read	PS_GEN_Property_Read	Provides read access to Block, Building, and Unit fields as well as Listings
		Provides CRUD access to objects used by Resident Service Teams and Portfolio Manager

Comment by [Jacob Smycz](#) [04/Mar/25]

Matthew Pitcairn yes that is correct

Comment by [Matthew Pitcairn](#) [04/Mar/25]

Cheers

Comment by [Matthew Pitcairn](#) [06/Mar/25]

Nikki I have edited to be explicit where the fields should be found on the unit page based on the attached screenshot, please let me know if that is correct - thanks.

Comment by [Jacob Smycz](#) [20/Mar/25]

Added update notes in **ORANGE** based on RBAC requirements

Comment by [Jacob Smycz](#) [20/Mar/25]

Nadia Swarts moving this into QA again after the changes made in orange.

Comment by [Nadia Swarts](#) [20/Mar/25]

Jacob Smycz Thanks, will get to it shortly

Comment by [Helen Douglas-Teggart](#) [10/Apr/25]

Fields are present but not populated

The Astley - Apartments

The Kimmeridge - Apartments

Tenanted

2 Bedrooms

1

Unit Details	Lettings And Marketing	Property Management	Tenants Contact Details	Key Documents	Re
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Availability and Pricing

Available Date



Marketing Rent

Future Vacant Date

Previous Rent



(Monthly)

Marketing Launch Date

Current Rent (Monthly)



Lettings Priority



Active Listings?

No

Access Availability

Key location - Lettings
Marketing**Unit Status**

Comment by Jacob Smycz [14/Apr/25]

Helen Douglas-Teggart Hi - these will need to manually input by a lettings manager / admin to have a value in

Comment by Elisabeta Mihalache [22/Apr/25]

Unit
Apt 402, Abbeville Apts, 37 London Rd, Barkin

Building	Block	Unit Status	Bedrooms	Bathrooms	Priority Flag
Abbeville Apartments, 37 London Road, Bar	Abbeville - Apartments	Reserved	3 Bedrooms	2	

Unit Details	Lettings And Marketing	Property Management	Tenants Contact Details	Key Documents	Related
--------------	-------------------------------	---------------------	-------------------------	---------------	---------

Availability and Pricing

Available Date

02/07/2024

Marketing Rent

Future Vacant Date

14/05/2026

Previous Rent (Monthly)



Marketing Launch Date

Current Rent (Monthly)



Lettings Priority



ERV Date



30/09/2023

No

ERV



£24,000.00

Access Availability

ERV MONTHLY

£2,000.00

Key location - Lettings Marketing

March 23 ERV

£23,928.01


Unit
Apt 402, Abbeville Apts, 37 London Rd, Barkin

Building Abbeville Apartments, 37 London Road, Bar	Block Abbeville - Apartments	Unit Status Reserved	Bedrooms 3 Bedrooms	Bathrooms 2	Priority Flag
---	---------------------------------	-------------------------	------------------------	----------------	---------------

Unit Details	Lettings And Marketing	Property Management	Tenants Contact Details	Key Documents	Related
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Availability and Pricing

Available Date 02/07/2024	Marketing Rent
Future Vacant Date 14/05/2026	Previous Rent (Monthly) 1,000
Marketing Launch Date	Current Rent (Monthly)
Lettings Priority <input type="checkbox"/>	ERV Date 30/09/2023
Active Listings? No	ERV £24,000.00
Access Availability	ERV MONTHLY £2,000.00
Key location - Lettings Marketing	March 23 ERV £23,928.01

Marketing Rent

Previous Rent (Monthly)

1,000

Current Rent (Monthly)

ERV Date

30/09/2023

ERV

£24,000.00

ERV MONTHLY

£2,000.00

March 23 ERV

£23,928.01

Lettings manager permission set able to edit Previous Rent and fields read-only for other permission sets. Before I can mark as Pass, Nadia Swarts Sarah Jessiman J configured to pull the data from elsewhere?

Comment by Jacob Smycz [23/Apr/25]

Elisabeta Mihalache Hello - yes the 'Current Rent' field will be used in the later release. For now these will be empty

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

[CJR-47] Data Migration - Create Tenancy for all Current Residential Tenancies Created: 10/Dec/24 Updated: 28/Apr/25 Resolved: 15/Apr/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, REFINED, SVOC, UAT		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Attachments:	Grainger Tenancies - Spot Check Bulk Update Logic (2).xlsx	image-20250106-155938.png	image-20250313-133249.png
Issue links:	Blocks		

blocks	CJR-50	Data Extracts - Identify Tenancy Data...	Done
blocks	CJR-119	Create a Renewal from a Tenancy	Done
blocks	CJR-174	Data Migration: Link Parking & Decant...	Done
blocks	CJR-418	Data Migration - Include Ground Rent ...	Done
is blocked by	CJR-550	Rollup summary is setting End Date on...	To Do

	is blocked by	CJR-45	Users can see Tenancy & Tenancy Conta...	Done
	is blocked by	CJR-56	Add Tenancy to Opportunity	Done
	is blocked by	CJR-59	Populate New 'Uplift %' & 'Security D...	Done
	Relates			
	relates to	CJR-518	Data Migration - Migrate Tenancy End ...	To Do
	relates to	CJR-404	Data Migration - Tenancy not linked t...	Done
	relates to	CJR-415	Undo - Update Data Migration to Popul...	Done
	relates to	CJR-430	Creating Activated/Current Tenancies	Done
	relates to	CJR-517	Data Migration - Exclude Commercial T...	Done
	relates to	CJR-118	Create & Update Tenancy Contact Roles...	To Do
	relates to	CJR-43	Update/End Tenancy, Contract & Tenanc...	Done
	relates to	CJR-51	[Replaced by CJR-47] Activate & End H...	Done
	relates to	CJR-55	Create/Update Tenancy from Qube [Grai...	Done

Story point estimate:

13

Sprint:	CJR Sprint 3
Rank:	2 j012pb:000000zx000i

Description**Principles:**

- All current, residential Qube tenancies must be migrated, regardless of whether or not there are any opportunities or contracts in SF.
- We must never overwrite the opportunity PMS reference already saved in SF. We can only create a new link to an opp to a residential tenancy if the PMS Reference ID is null.

Exclusion: Former tenancies will not be migrated into Salesforce.

When the SVOT changes go live, I want the parent / child tenant records and relationships to be created for each current residential tenancy, so that accurate contract and tenancy data can be maintained in Salesforce for current and future tenancies.

Dependency: Grainger to provide a data extract from Qube that contains all **active, residential** tenancies

A/C 1 - Create Residential Tenancies in Salesforce from Qube Extract

CREATE **one** new **Contract** record for **each** unique **Qube Tenancy ID** provided in the Qube data extract (regardless of whether or not it maps to any existing opportunities or contracts in Salesforce)

- WHERE *Con Tran* = 'Sharer'
- AND exclude *Unit Tenure* = 'Grnd Rent'
- AND exclude where *Contact ID/Info s[6]* is null

AND the contract record will be populated with the following data:

Field	Populate	Comments
Record Type	'Residential Tenancy'	
PMS Reference ID	<i>Qube Tenancy ID</i> from extract	
Status	'Draft'	
Record Status	'Draft' 'Current'	
Unit	<i>Salesforce Unit ID</i> from extract	If there is none, or the ID does not exist in Salesforce, then no record can be created.
Start Date	<i>Tenancy Commenced</i> from Unit extract	Grainger (Deb) provided separate extract with tenancy start/end at Unit level
Tenancy End Date	<i>Tenancy Terminates</i> from Unit extract	Grainger (Deb) provided separate extract with tenancy start/end at Unit level
Account Name	If there is a single record for the Qube tenancy in the data extract: <i>Account</i> linked to the <i>Contact ID</i> (as provided on the spreadsheet). If there are multiple records for the Qube tenancy in the data extract: <i>Account</i> linked to the <i>Contact ID</i> for the <i>Lead Tenant</i> (as provided on the spreadsheet).	If there is no 'Lead Tenant' provided on the data extract, then no record can be created. Account could be a person or company account.
Agreement Type	If <i>Unit Type</i> is 'Garage', 'ParkingSpac' or 'Shed' => Licence For all other unit types, use the <i>Unit Tenure</i> : 'AST' => AST 'Aff Rent' => AST (Affordable) 'Live Work' => Live Work 'Comp-Let' => Non-Housing (Company) 'Occ Con' => Occupation Contract 'Licence' => Decant Agreement Normal	Will not be complete. GREP cannot populate this via the integration.
Description	Qube unit tenure type ; i.e. the value from the Qube extract used in agreement type mapping above.	

A/C 2 - Identify Opportunities for the Most Recent Tenancy per Unit**New Lease Opportunities**

For each unit [Primary Offer Unit]:

IDENTIFY the opportunity with the **latest Move In Date**

WHERE the **record type** is 'Residential_Opportunity'

AND **tenancy type** is 'New'

AND **stage** is 'Audit' or 'Closed Won'.

Renewal Opportunities

For each "new" opportunity identified above:

IDENTIFY **all** opportunities for the same unit [Primary Offer Unit]

WHERE the **Move In Date** is after the new opportunity's **Move In Date**

AND **record type** is 'Residential_Opportunity'

AND **tenancy type** is 'Renewal'.

- AND **all stages** should be included => NB all completed renewals and renewals in progress need to be linked to the tenancy below.

A/C 3 - Link Opportunities & Contracts to a Tenancy where the PMS ID Matches

GIVEN a new opportunity (identified in A/C2) has a **PMS Reference ID** that matches a **residential tenancy [contract]** record's **PMS Reference ID** (created in A/C1)

THEN update the new **opportunity** **AND all subsequent renewal opportunities for that unit**:

- Populate opportunity's **Tenancy ID** = residential tenancy [contract] record ID

AND update all **contracts** linked to those opportunities (i.e. where Contract.OpportunityID = the new opportunity or any subsequent renewal opportunities for that unit)

(note there may be multiple contract records linked to one opportunity):

- Populate contract's **Tenancy ID** = residential tenancy [contract] record ID

AND update the **residential tenancy [contract]** record:

- Contract's **opportunity ID** = the **new** opportunity's ID

GIVEN a new opportunity (identified in A/C2) has a **PMS Reference ID** that does **not match** a residential tenancy record's **PMS Reference ID** (created in A/C1)

THEN there are no updates & **none** of the opportunities identified for that unit will be linked to a residential tenancy.

A/C 4 - Link Opportunities & Contracts to a Tenancy where there is no PMS ID

GIVEN a new opportunity (identified in A/C2) does not have a **PMS Reference ID**

AND there is **no** residential tenancy [contract] record (created in A/C1) for the same unit

THEN there are no updates.

GIVEN a new opportunity (identified in A/C2) does not have a **PMS Reference ID**

AND there is a **residential tenancy [contract]** record (created in A/C1) for the **same unit**

THEN update the new **opportunity** **AND** any subsequent renewal opportunities for that unit:

- Populate opportunity's **Tenancy ID** = residential tenancy [contract] record ID

AND update all **contracts** linked to those opportunities (i.e. where Contract.OpportunityID = the new opportunity & subsequent renewal opportunities for that unit)

(note there may be multiple contract records linked to one opportunity):

- Populate contract's **Tenancy ID** = residential tenancy [contract] record ID

AND update the **residential tenancy [contract]** record:

- Contract's **opportunity ID** = the new opportunity's ID

A/C 5 - Activate Draft Contracts for Closed Won Opportunities that are Linked to a Residential Tenancy

GIVEN an **opportunity's Tenancy** field is populated

AND the Stage is 'Closed Won'

THEN identify the final **agreement** linked to the opportunity:

- If there is only one associated agreement that is in a 'Signed' **Agreement Status** → use the signed agreement, else
- If there are multiple agreements in a 'Signed' **Agreement Status** → use the one with the last **Created Date**, else
- If there are no agreements in a 'Signed' **Agreement Status** and there is only one agreement in a 'Draft' **Agreement Status** → use the draft agreement, else
- Use the agreement with last **Created Date**.

AND then identify the **contract** linked to the final agreement

AND if that contract's **Record Status** is 'Draft': Update the contract's **Status** and **Record Status** to 'Activated'.

Opportunities > COS @ RENEWAL - 127, Gatehouse Apts - 13/09/23					
Agreements					
4 items • Sorted by Created Date • Updated a few seconds ago					
Agreement Name	Tenancy	Document ...	Agreement Sta...	Created Date ↑	
127 Gatehouse - renewal agreement to sign	00028468	AST	Expired	27/07/2023, 11:00	
127 Gatehouse - change of sharer at renewal agreement to sign ASAP	00029974	AST	Cancelled / Declined	06/09/2023, 10:24	
127 Gatehouse - renewal agreement to sign	00029977	AST	Cancelled / Declined	12/09/2023, 10:28	
127 Gatehouse - agreement to sign asap	00030716	AST	Signed	28/09/2023, 16:07	

- See spot check file with examples attached.

- Replaces <https://graingerplc.atlassian.net/browse/CJR-51>

A/C 6 - End Activated Contracts that are not the Latest Version of the Contract

GIVEN a **Contract** record has a **record type** of 'Residential Tenancy'

AND has more than one child **Contract** record with **Tenancy Status** 'Activated' (after A/C 5 has run)

THEN those activated child contracts will be updated:

- The *Tenancy Status* of the child contract that has the **last** *Tenancy Start Date* will remain unchanged (i.e. will remain 'Activated').
- The *Tenancy Status* of all others will be updated to 'Ended'.

A/C 7 - Update Residential Tenancy Information based on Child ContractsGIVEN a *Contract* record has a *record type* of 'Residential Tenancy'AND has one or more child *Contract* records with *Tenancy Status* 'Activated' or 'Ended'

THEN identify the activated or ended child record which:

- Has the earliest *Tenancy Start Date* (aka "First Child Record")
- Has the last *Tenancy Start Date* (aka "Last Child Record") - Note this may be the same record if only one child record meets the criteria.

AND update the below fields on the **Residential Tenancy contract** record:

Field	Value Populated
Tenancy Owner	From last child record
Agreement Type	From last child record
Document Type	From last child record
Memorandum of Agreement Date	From last child record
Start Date	
Tenancy End Date	End Date from last child record [note this is a different field]
Actual Move Out Date	From last child record
Uplift %	From last child record
Security Deposit Amount	From first child record
Break Clause	If this field is populated on the last child record with any value other than 'Check Contract': Use this value. Otherwise populate from the first child record.
Special Clauses	If this field is populated on the last child record: Use this value. Otherwise populate from the first child record
Special Clause Free Text	If this field is populated on the last child record: Use this value. Otherwise populate from the first child record
Vehicle Make	If this field is populated on the last child record: Use this value. Otherwise populate from the first child record.
Vehicle Model	If this field is populated on the last child record: Use this value. Otherwise populate from the first child record.
Vehicle Registration	If this field is populated on the last child record: Use this value. Otherwise populate from the first child record.

A/C 8 - Link any EOTs in Progress to the Tenancy (and no longer the Contract)GIVEN an *End of Tenancy* record is in an 'Active' or 'Pending Cancel/Close' StatusAND the linked *Tenancy* record itself has a *Tenancy* value populated (i.e. with a parent Residential Tenancy)THEN the *End of Tenancy* record's *Tenancy* value will be updated to the parent Residential Tenancy's ID.A/C 9 - Exception Report of Tenancies that could not be created in Salesforce

Provide an Excel sheet of all Qube tenancies provided in the Qube extract that were NOT converted to a Salesforce Residential Tenancy ID.

Comments

Comment by [Nikki](#) [13/Jan/25]

Sam Duncan , Please can you review this data migration logic for SVOT.

Comment by [Matthew Cornfield](#) [19/Jan/25]

Sam Duncan any movement on getting access to Grainger's server?

Comment by [Nikki](#) [21/Jan/25]

Hi Matthew Cornfield , Please can you add the new logic for A/C 3 [Link Existing Contracts to Residential Tenancy Records] & A/C 4 [Link Existing Opportunities to Residential Tenancy Records] to the story.

Also, when linking opportunities to tenancies, the logic should link any 'new' opportunity that is in an 'Audit' or 'Closed Won' stage, as well as subsequent 'renewal' opportunities in *any* stage.

cc Sam Duncan

Comment by [Matthew Cornfield](#) [23/Jan/25]

A/C 8

```
select Agreement_Type__c, ContractId
from Opportunity
where Contract.RecordType.DeveloperName = 'Residential_Contract'
and StageName = 'Closed Won'
```

Comment by [Matthew Cornfield](#) [24/Jan/25]

Nikki Please can you review the updated logic for AC 3 and 4, I have also Updated the Opportunity data to include Opps in Both the "Closed Won" and "Audit" stage

Comment by [Nikki](#) [24/Jan/25]A/C 2 - Create Tenancy Contract Roles from Qube Extract << Replaced by <https://graingerplc.atlassian.net/browse/CJR-118>

GIVEN a contract record was successfully created from the Qube Tenancy ID in A/C 1

WHEN the once-off data migration runs

THEN create a new Tenancy Contact Role record for each each associated row in the Qube data extract:

Field	Data Type	Comment
Contract ID	Residential Tenancy Contract ID created in A/C 1	
Contact ID	Salesforce Contact ID from data extract	
Role	If Child Tenant Occupier Type is 'Lead Tenant' => Lead Tenant If Child Tenant Occupier Type is 'Tenant' => Tenant If Child Tenant Occupier Type is 'Additional occupier' => Permitted Occupier If Child Tenant Occupier Type is 'Guarantor' => Guarantor Any other value => Relevant Person	
Relationship	Null	
Other	Null	
Start Date	Child Tenant Start Date	
End Date	Child Tenant End Date	May be null

Comment by Nikki [05/Mar/25]

Matthew Cornfield Updated agreement type mapping in A/C 1

Comment by Nikki [07/Mar/25]

Matthew Cornfield , can you confirm - there were no license tenancies in that Qube data extract?

We are going to need an updated extract from Qube that includes parking and decants. We can discuss in Monday's refinement.

Comment by Nikki [13/Mar/25]

Sam Duncan , should the data migration also create tenancies in draft Status and Tenancy Status? Or is there a reason to set them to Activated / Current from the beginning?

Comment by Matthew Cornfield [13/Mar/25]

Nikki This story is ready for review, I would like to review before i do the exception report as any changes post review will have an effect on the exception report.

Comment by Sam Duncan [13/Mar/25]

 Nikki 1 hour ago 

@Sam Duncan , should the data migration also create tenancies in draft Status and Tenancy Status? Or is there a reason to set them to Activated / Current from the beginning?



Nikki I think we should create them in draft status. They will get activated once the GREP integration runs in "full load mode" and "locks onto" all the Tenancy records. This way we know that a tenancy in draft status hasn't yet been update from Qube.

Comment by Nikki [13/Mar/25]

Matthew Cornfield Jacob Smycz , did we get an updated list of Qube Tenancies from Grainger?

Comment by Nikki [13/Mar/25]

Matthew Cornfield I updated the tenancy status logic in A/C1

Comment by Matthew Cornfield [13/Mar/25]

Nikki Not that I am aware of yet.

Jacob Smycz

Comment by Jacob Smycz [13/Mar/25]

Matthew Cornfield Nikki - not yet, I will reach out again to Trish

Comment by Matthew Cornfield [13/Mar/25]

Nikki Will adjust logic accordingly

Comment by Matthew Cornfield [14/Mar/25]

Nikki They have sent the new Qube extract.

Looks like I will need to restructure my tables to fit the extract.

Will make the required changes.

[Copy of SVOT - Qube Current Tenants and Units - 130325.xlsx](#)

Comment by Nikki [14/Mar/25]

Matthew Cornfield , let's review the data they have provided and discuss before you make any changes to the migration logic.

cc Sam Duncan

Comment by Nikki [17/Mar/25]

Matthew Cornfield , I updated the logic in blue in A/C 1 & 7.

Comment by Nikki [19/Mar/25]

Matthew Cornfield , I updated the logic in purple in A/C 1 & 7, and I don't think we need the exception report anymore.

Comment by Jacob Smycz [11/Apr/25]

Matthew Cornfield as per this ticket: <https://graingerplc.atlassian.net/browse/CJR-430> and a previous discussion, when creating new Residential Tenancies, the Record Status should be set to 'Current'. We will then need to do a bulk update to change the Status to 'Activated'. (This alters AC 1 edited in GREEN)

cc Nikki

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)**[CJR-46] Create/Update Tenancies** Created: 10/Dec/24 Updated: 02/May/25 Resolved: 27/Feb/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	Dev_Reviewed, OpenBox, Prod_Approved, SVOC, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:				
Issue links:	Blocks blocks CJR-149 {Not a bug}Renewal Contracts are not ... Done is blocked by CJR-44 Activate Contracts on COS & Renewal Done is blocked by CJR-45 Users can see Tenancy & Tenancy Conta... Done Relates relates to CJR-230 Add N/A to Contract Break Clause Options To Do relates to CJR-128 Can't Create Tenancy as Stewart Black... Done relates to CJR-132 QA - Create a Tenancy for a New Grain... Done relates to CJR-139 {Not a bug}Error when activating more... Done relates to CJR-153 Residential Tenancy fields got update... Done relates to CJR-154 Incorrect Start Date and End Date on ... Done relates to CJR-159 Contract/Tenancy Start Date, End Date... Done relates to CJR-165 [Not Required] - Tenancy created in d... Done relates to CJR-171 Link Tenancies created to Opportunit... Done relates to CJR-237 Update Tenancy End Date on Renewal/COS Done relates to CJR-436 Not Required Done relates to RTR-11 Delete RTR Info for Former Tenants & ... To Do			
Sub-tasks:	Key	Summary	Type	Status
	CJR-76	QA	Subtask	Done
Story point estimate:	8			
Sprint:	CJR Sprint 1			
Rank:	2 j0193g:80r			

Description

When a new lease contract is finalized, I want a tenancy to be created, so that we have a record of the overall tenancy that is aligned with the tenancy in Qube.

A/C 1 - Create a Tenancy when a Contract for a New Lease is Activated

GIVEN a contract has a Record Type of 'Residential Contract'

AND the Tenancy Type is 'New'

AND the Agreement Type is not 'Decant Agreement Normal' or 'Decant Agreement Wales'

WHEN the Tenancy Status changes to 'Activated'

- Either directly on the tenancy details screen
- OR via existing trigger: GIVEN a residential opportunity has (only) one associated agreement that is in a 'Signed' Agreement Status AND is linked to a Tenancy with a Tenancy Type 'New' WHEN the opportunity's Stage is updated to 'Audit' THEN the tenancy status is updated to 'Activated'
- OR where a Grainger Trust contract is created from the create EOT process

THEN a new tenancy record will be created with identical details and a Record Type of 'Residential Tenancy'

AND the Tenancy field on the activated contract will be updated with the new tenancy record's ID

AND the Tenancy field on the linked opportunity will be updated with the new tenancy record's ID

AND the PMS Reference on the new tenancy record will be populated with the PMS Reference on the linked opportunity.

A/C 2 - Link Other Draft Contracts to the Tenancy

GIVEN the contract in A/C1 has a *Record Type* of 'Residential Contract'

AND the linked *opportunity* has multiple **agreement** records

AND those agreement records are not all linked to the same *tenancy/contract* [see example below]

WHEN the residential contract is activated in A/C1

THEN the **other tenancy/contract** records linked to the opportunity via an **agreement** will also be updated: Their *Tenancy* field will be updated with the new **residential tenancy** record's ID.

Agreements (3)					
3 items • Sorted by Created Date • Updated 14 minutes ago					
	Agreement Name	Tenancy	Document ...	Agreement Status	Created Date ↑
1	Adobe Sign Agreement	00008751	AST	Cancelled / Declined	26/08/2021, 16:59
2	Adobe Sign Agreement	00008751	AST	Cancelled / Declined	26/08/2021, 17:20
3	Adobe Sign Agreement	00008756	AST	Signed	26/08/2021, 18:37

A/C 3 - Create Tenancy Contact Roles when a New Tenancy is Created << REMOVE

WHEN a new 'Residential Tenancy' *Contract* record is created as per A/C 1

THEN a new **tenancy contact role** [*ContractContactRole*] record will be created for each active opportunity contact role that is linked to the tenancy's *Opportunity*, as follows:

Field	Default Value	Comments
Contract ID	Tenancy ID	ID of the new Residential Tenancy record.
Contact ID	As per the Opportunity Contact Role	
Role	As per the Opportunity Contact Role	
Relationship	As per the Opportunity Contact Role	
Other	As per the Opportunity Contact Role	
Start Date	Activated contract's <i>Tenancy Start Date</i>	From the Residential Contract record. In this scenario, it is the same as the Residential Tenancy's <i>Tenancy Start Date</i>
End Date	Null	

When a renewal or mid-term change of lease contract is finalized, I want the associated tenancy to be updated, so that we have up-to-date tenancy information in Salesforce.

A/C 4 - Update Tenancy when a Mid-Term Contract is Activated

GIVEN a contract record has a *Record Type* of 'Residential Contract'

AND the *Tenancy Type* is not 'New'

AND the *Agreement Type* is not 'Decant Agreement Normal' or 'Decant Agreement Wales'

WHEN the *Tenancy Status* changes to 'Activated' (either directly on the tenancy details screen OR via <https://graingerplc.atlassian.net/browse/CJR-44>)
THEN the below fields (only) on the linked *Tenancy* record will be updated:

Field	Updated Value	Comments
Account Name	As per newly activated residential contract	
Agreement Type	As per newly activated residential contract	
Unit	As per newly activated residential contract	
Document Type	As per newly activated residential contract	
Tenancy End Date	As per newly activated residential contract	
Tenancy Term (months)	= Number of months (rounded to nearest integer) between <i>Tenancy Start Date</i> that is already populated on the tenancy record & the new <i>Tenancy End Date</i> .	
Break Clause	If <i>Break Clause</i> on the residential contract is 'Check Contract': Do not update Otherwise: As per newly activated residential contract	
Tenant Break	If <i>Break Clause</i> on the residential contract is 'Check Contract' AND <i>Tenant Break</i> on the residential contract is null: Do not update Otherwise: As per newly activated residential contract	
Landlord Break	If <i>Break Clause</i> on the residential contract is 'Check Contract' AND <i>Landlord Break</i> on the residential contract is null: Do not update Otherwise: As per newly activated residential contract	
Special Clauses	If <i>Break Clause</i> on the residential contract is 'Check Contract' AND no <i>Special Clauses</i> are selected on the residential contract: Do not update Otherwise: As per newly activated residential contract	
Special Clause Free Text	If <i>Break Clause</i> on the residential contract is 'Check Contract' AND <i>Special Clause Free Text</i> on the residential contract is null: Do not update Otherwise: As per newly activated residential contract	
Uplift %	As per newly activated residential contract	
Description	As per newly activated residential contract	Is not currently populated on any tenancy.

Vehicle Make	If <i>Vehicle Make</i> on the residential contract is null: Do not update Otherwise: As per newly activated residential contract	
Vehicle Model	If <i>Vehicle Model</i> on the residential contract is null: Do not update Otherwise: As per newly activated residential contract	
Vehicle Registration	If <i>Vehicle Registration</i> on the residential contract is null: Do not update Otherwise: As per newly activated residential contract	

A/C 5 - End the Previous Contract when a Mid-Term Contract is Activated

GIVEN one or more contract records [with record type of 'residential contract'] have the **same Tenancy** as the contract that was activated in A/C 4
AND their *Tenancy Status* is 'Activated'
AND their *Agreement Type* is not 'Decant Agreement Normal' or 'Decant Agreement Wales'

WHEN the residential contract is activated in A/C 4

THEN these other tenancy record(s) will be updated with *Tenancy Status* of 'Ended'.

A/C 6 - Add New Tenancy Contact Roles when a Mid-Term Contract is Activated << REMOVE

GIVEN the **residential contract** that was activated in A/C 4 is linked to an *opportunity* with an active opportunity contact role
AND the linked **residential tenancy** record does not have a **tenancy contact role** with no *End Date* AND the same *Contact ID* AND the same *Role*

WHEN the residential contract is activated in A/C 4

THEN a new tenancy contact role will be created:

Field	Default Value	Comments
Contract ID	Residential Tenancy ID	Activated contract's <i>Tenancy</i>
Contact ID	As per the Opportunity Contact Role	
Role	As per the Opportunity Contact Role	
Relationship	As per the Opportunity Contact Role	
Other	As per the Opportunity Contact Role	
Start Date	Activated contract's <i>Tenancy Start Date</i>	From the residential contact record. In this scenario, the date will be different to the residential tenancy's <i>Tenancy Start Date</i>
End Date	Null	

A/C 7 - End Tenancy Contact Roles when a Mid-Term Tenancy is Activated << REMOVE

GIVEN the **residential tenancy** record that is updated in A/C 4 has a **tenancy contact role** with no end date
AND the **residential contract** that was activated is linked to an *opportunity* that does not have an active opportunity contact role with the same *Contact ID* and *Role*

WHEN the residential contract is activated in A/C 4

THEN the tenancy contact role will be updated:

- *End Date* = [One day before the Tenancy Start Date of the activated residential contract record]

Comments

Comment by Nikki [20/Feb/25]

Moved back to 'in progress'; some A/Cs removed.

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)

[CJR-45] Users can see Tenancy & Tenancy Contact Role Information Created: 10/Dec/24 Updated: 02/May/25 Resolved: 26/Feb/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	Integrations, OpenBox, Prod_Approved, SVOC, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:					
Issue links:	Blocks blocks CJR-42 Import Arrears into Salesforce [Grain... To Do blocks CJR-118 Create & Update Tenancy Contact Roles... To Do blocks GJR-46 Create/Update Tenancies Done blocks GJR-47 Data Migration - Create Tenancy for a... Done blocks GJR-56 Add Tenancy to Opportunity Done blocks GJR-57 Users Can Easily Access Tenancies Done blocks GJR-59 Populate New 'Uplift %' & 'Security D... Done blocks GJR-93 "Residential Contract" and "Resident... Done is blocked by GJR-309 Contract.PMS_Reference__c must be def... Done is blocked by GLTL-9 Create Commercial Contracts in Salesf... Done Cloners is cloned by GJR-120 Users can see Qube Tenancy Details Done Relates relates to CJR-551 Remove Tenancy Contact Role fields To Do relates to GJR-85 Compact Layout: Fields missing Done relates to GJR-100 Tenancy Contact Roles related list mi... Done relates to GJR-105 Fields Missing & Incorrect Field Edit... Done relates to GJR-112 Opportunity Related List on Residenti... Done relates to GJR-113 Fields Missing on commercial contract Done relates to GJR-115 Cosmetic: Rename "Tenancy Record Type..." Done relates to GJR-130 Section headers Done relates to GJR-134 Remove Renewal Denied Help Text Done relates to GJR-155 "Memorandum of Agreement Date" missin... Done relates to GJR-307 Contract Related list on Resi Tenancy... Done				
Sub-tasks:	Key	Summary	Type	Status	Assignee
	CJR-72	QA	Subtask	Done	Mudzunga Khonani Davhana
Story point estimate:	3				
Sprint:	CJR Sprint 1				
Rank:	2 j0193g:84				

DescriptionA/C 1 - Add/Update **Tenancy** FieldsAdd / update the following fields on the *Contract* object:

Field	Field API Name	Data Type	New / Existing Field	Req- uired	Help Text	Add to Permission Sets	Comments
Record Type		Existing options: Commercial Contract, Residential Contract New options: Commercial Tenancy , Residential Tenancy	Existing	Yes			
Tenancy		Tenancy/contract lookup	New	No	Overall tenancy of which this contract forms part.	Jacob to add	
PMS Reference	PMS_Reference__c	Text ; must be unique	New	No	Qube Tenancy ID		
Arrears Balance	Arrears__c	Currency	New	No	Current arrears balance for the tenancy. sourced from Qube		
Passing Rent		Currency	New	No	Current passing rent; sourced from Qube.		
Renewal Denied		Boolean / checkbox	New	No	Sourced from Qube		
Uplift %		Percentage	New	No			Replace the existing <i>Uplift</i> field that is a formula = Opportunity_.r. <i>Primary_Offer_Uplift_c</i>

Security Deposit Amount		Currency	New	No			Replace the existing <i>Security Deposit</i> field that is a formula = Opportunity_r. <i>Security_Deposit_c</i>
-------------------------	--	----------	-----	----	--	--	---

A/C 2 - Add/Update Tenancy Contact Role Fields

Add the following fields on the *Tenancy_Contact_Role* object:

Field	Data Type	New / Existing Field	Required	Help Text
Contract ID		New	Yes	
Contact ID		New	Yes	
Role	Picklist: Same options as the <i>Role</i> field on the Opportunity Contact Role	New	Yes	
Relationship	Dependent picklist: Same options as the <i>Relationship</i> field on the Opportunity Contact Role	New	No	
Other	Short Text	New	No	
Start Date	Date	New	Yes	
End Date	Date	New	No	

- It should be possible for a single contact to have multiple *Tenancy Contact Role* records for the same tenancy/contract over time; e.g. where:
 - A person vacates a unit and then moves back in at a later date.
 - A person changes from being a tenant to a guarantor over time.

A/C 3 - Update Page Layout for Residential Contracts

GIVEN a tenancy record has a record type of '**Residential Contract**'

WHEN a user views the tenancy details

THEN the *Record Type* will be added to the compact layout

Section	Field	Editable
Details	Tenancy Owner	Yes
	Opportunity	Yes
	Account Name	Yes
	Tenancy	No
	Tenancy Status	Yes
	Tenancy Type	Yes
	Agreement Type	Yes
	Document Type	Yes
	Memorandum of Agreement Date	Yes
	Tenancy Term (months)	Yes
	Tenancy Start Date	Yes
	Tenancy End Date	No
	Actual Move Out Date	Yes
Details > Additional Information	Unit	Yes
	Rent	No
	Uplift % << New field	Yes
	Security Deposit Amount << New field	Yes
	Break Clause	Yes
	Tenant Break	Yes
	Landlord Break	Yes
	Special Clauses	Yes
	Special Clause Free Text	Yes
	Live Work Clause	No
	Description	Yes
Details > Vehicle Details (Parking License Only)	Vehicle Make	Yes
	Vehicle Model	Yes
	Vehicle Registration	Yes
Details > System Information	Tenancy Number	No
	Status	Yes
	Record Type	No
	Activated By	No
	Created By	No
	Last Modified By	No

A/C 4 - Update Page Layout for Commercial Contracts

This a/c updates the layout already implemented in <https://graingerplc.atlassian.net/browse/CLTL-159>

GIVEN a tenancy record has a record type of '**Commercial Contract**'

WHEN a user views the tenancy details

THEN the *Record Type* will be added to the compact layout

AND the existing *Security Deposit* field will be replaced with the new *Security Deposit Amount* field

AND the following additional fields will be added to the page layout:

Field	Location	Editable	Comments
Tenancy Details		No	Clickable link

A/C 5 - New Record Layout for Residential Tenancies

GIVEN a tenancy record has a *record type* of '**Residential Tenancy**'

WHEN a user views the tenancy details

THEN the following **buttons** will be displayed: Edit, Change Owner, Delete,

AND the following fields will be displayed in the **compact layout**: Account Name, Agreement Type, Unit, Tenancy Start Date, Tenancy End Date, Record Type

AND the following fields will be displayed on the **Details** tab:

Section	Field	Editable	Comments
Details	Tenancy Owner	Yes	
	Tenancy Number	No	
	Account Name	Yes	
	Tenancy Status	No	Imported from Qube
	Agreement Type	Yes	
	Document Type	Yes	
	Tenancy Term (months)	Yes	
	Tenancy Start Date	Yes	
	Tenancy End Date	No	Calculated
	Actual Move Out Date	Yes	
	Renewal Denied	Yes	
Details > Additional Information	Unit	Yes	
	Passing Rent	No	Imported from Qube
	Uplift %	Yes	
	Arrears	No	Imported from Qube
	Security Deposit Amount	Yes	
	Break Clause	Yes	
	Tenant Break	Yes	
	Landlord Break	Yes	
	Special Clauses	Yes	
	Special Clause Free Text	Yes	
	Live Work Clause	No	Calculated field
	Description	Yes	
Details > Vehicle Details (Parking License Only)	Vehicle Make	Yes	
	Vehicle Model	Yes	
	Vehicle Registration	Yes	
Details > System Information	PMS Reference ID	No	Imported from Qube
	Status	Yes	
	Record Type	No	
	Created By	No	
	Last Modified By	No	

AND the following will display in the **Related** tab:

- Tenancy Contact Roles = All ContractContactRole records linked to the current record's ContractID
- Contracts = All tenancy records where the *Tenancy ID* = the current record's ContractID AND record type is 'Commercial Contract' or 'Residential Contract'
- End of Tenancies
- Opportunities = All opportunity records where the *Tenancy ID* = the current record's ContractID.
- Tenancy History
- Files

A/C 6 - New Record Layout for Commercial Tenancies

GIVEN a tenancy record has a *record type* of '**Commercial Tenancy**'

WHEN a user views the tenancy details

THEN the following **buttons** will be displayed: Edit, Change Owner, Delete

AND the following fields will be displayed in the **compact layout**: Account Name, Agreement Type, Unit, Tenancy Start Date, Tenancy End Date, Record Type

AND the same fields will be displayed on the **Details** tab as the 'Commercial Contract' record type, except for the following:

- Tenancy – will not be displayed

Section	Field to Display	Editable
Details > Replace Rent field	Passing Rent	No
Details	Arrears	No
Details > System Information	PMS Reference ID	No

AND the following will display in the **Related** tab:

- **Tenancy Contact Roles** = All ContractContactRole records linked to the current ContractID
- **Contracts** = All tenancy records where the **Tenancy** = the current record's ContractID AND record type is 'Commercial Contract' or 'Residential Contract'
- **Opportunities** = All opportunity records where the **Tenancy** = the current record's ContractID
- **Tenancy History**
- **Files**

Implementation Approach

- Try delete the existing Uplift & Security Deposit fields. Else remove all field level security.
- For AC 2, Create new Tenancy Contact Role object with settings as below.

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	<input type="text" value="Tenancy Contact Role"/>	Example: Account
Plural Label	<input type="text" value="Tenancy Contact Roles"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="Tenancy_Contact_Role"/>	Example: Account
-------------	---	------------------

Description

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a custom s-control
<input type="radio"/> Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name is displayed here.

Record Name	<input type="text" value="Tenancy Contact Role N: Example: Account Name"/>
-------------	--

Data Type **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

- Give CRUD access to the object to <permission set to be confirmed>
Create lightning record page with "Header and Right Sidebar" layout. Set as org default. Add fields as shown in AC2.
- Add related list for this object to the Tenancy lightning record page (add to all lightning pages if there are different pages for different Tenancy record types)

Comments

Comment by Anjali Salecha [27/Jan/25]

Hi Nikki , there are no existing record type for Tenancy (Contract) . Shall I enable the new record types - "Commercial Tenancy" and "Residential Tenancy" ?

Record Types
0 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION

No items to display

Comment by Nikki [27/Jan/25]

Hi Anjali Salecha , you might as well add all 4. The record type addition and update of existing records is part of this CLTL story:

<https://graingerplc.atlassian.net/browse/CLTL-9>

Comment by Nikki [28/Jan/25]

Anjali Salecha please note I made minor changes to A/C 1 (in blue) and removed A/C 6. Also made Renewal Denied editable.

Comment by Anjali Salecha [28/Jan/25]

Hi Sam Duncan , looks like it is not possible to add custom fields to Tenancy Contact Role object. cc - Nikki

graingerplc--devxrenew.sandbox.my.salesforce-setup.com/lightning/setup/ObjectManager/

Sandbox: DEVxRenew | Log out

Setup Home Object Manager

SETUP > OBJECT MANAGER

Tenancy Contact Role

Details

Fields & Relationships

Page Layouts

Buttons, Links, and Actions

Unable to Access Page

The value of the "entity" parameter contains a character that is not allowed or the val parameter value or reduce the value length and resubmit. If the error still persists, re requesting as well as any other related information.

[Back](#)

Comment by Jacob Smycz [30/Jan/25]
Hi Anjali Salecha for custom permissions and record type access for Residential please add to this perm set: 'Residential Leasing User'. For FLS for an object please Unit RE for fields on the unit that only Renewals need. Feel free to reach out if you need

Comment by Jacob Smycz [04/Feb/25]
Hi Anjali Salecha please provide Read access in this perm set - PS_GEN_Contracts_Read and then provide Edit access in these perm sets:
PS_Residential_Lettings CRUD
PS_Commercial_Lettings CRUD
PS_Renewals CRUD
PS_Tenancy_Progression CRUD
PS_Operations CRUD
PS_Credit_Control CRUD
PS_Asset_Management CRUD

Comment by Sam Duncan [18/Feb/25]
Nikki I'm not following why a residential tenancy would ever have commercial contracts as related records?

AND the following will display in the **Related** tab:

- Tenancy Contact Roles = All ContractContactRole records linked to the current record's ContractID
- Contracts = All tenancy records where the *Tenancy ID* = the current record's ContractID AND record type is 'Commercial Contract' or 'Residential Contract'
- End of Tenancies
- Opportunities = All opportunity records where the *Tenancy ID* = the current record's ContractID.
- Tenancy History
- Files

Comment by Nikki [20/Feb/25]
Sam Duncan , agreed - a residential tenancy should never have commercial contracts as related records. I just saw us creating a generic 'Contract' related list that co changed if required.

cc Mudzunga Khonani Davhana

Comment by Sam Duncan [24/Feb/25]
Nikki FYI I added the "external id" so that this field can be used by an integration for UPSERT operations

DescriptionA/C 1 - Add/Update Tenancy Fields

Add / update the following fields on the Contract object:

Field	Field API Name	Data Type	New / Existing Field	Req- uired	Help Text	Add to Permission Sets	Comments
Record Type		Existing options: Commercial Contract, Residential Contract New options: Residential Tenancy	Existing	Yes			
Tenancy		Tenancy/contract lookup	New	No	Overall tenancy of which this contract forms part.	Jacob to add	
PMS Reference	PMS_Reference__c	Text ; must be unique; External ID	New	No	Qube Tenancy ID		
Arrears	Arrears__c	Currency	New	No	Current arrears balance for the tenancy.		

SVOT - Create Tenancies in Salesforce that Map to Qube (CJR-389)[↳ \[CJR-44\] Activate Contracts on COS & Renewal](#) Created: 24/Sep/24 Updated: 02/May/25 Resolved: 11/Feb/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Create Tenancies in Salesforce that Map to Qube

Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	OpenBox, Prod_Approved, REFINED, SVOC, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Issue links:	Blocks			
	blocks CJR-46	Create/Update Tenancies		
	Relates			
	relates to SFDC-698	Prevent Agreements from Expiring		
	relates to CJR-51	[Replaced by CJR-47] Activate & End H...		
	relates to CJR-169	Set Previously Signed Agreements to I...		
	relates to CJR-204	UAT - J HOWE - Unsure what child cont...		
Sub-tasks:	relates to RTR-27	[Replaced by CJR-46] Save Effective E...		
	Key	Summary	Type	Status
	CJR-75	QA	Subtask	Done
Story point estimate:	2			
Sprint:	CJR Sprint 1			
Rank:	2 j0193h:0i			

Description

When a renewal or COS opportunity is completed, I want the associated contract to be updated with a status of 'Activated', so that there is an accurate record of current contracts in Salesforce.

- Note: Not all COS & renewals opportunities will have signed agreements.

Acceptance Criteria

A/C 1 - Activate Contract Records for COS & Renewal Opportunities

GIVEN an **opportunity** has a record type of 'Residential Opportunity'
AND has a *Tenancy Type* of 'Renewal'
AND

- The opportunity has (only) one associated **agreement** that is in a 'Signed' *Agreement Status*
- OR the opportunity does **not** have any agreements in a 'Signed' *Agreement Status*
AND the opportunity has (only) one associated **agreement** in a 'Draft' *Agreement Status*

WHEN the opportunity's *Stage* is updated to 'Closed Won'

THEN the contract record linked to the above agreement will be updated:

- *Status* = 'Activated'
- *Tenancy Status* = 'Activated'

Implementation Approach

- Update existing automation to active new lease contracts (dev'd during EOT)

Comments

Comment by **Nikki** [26/Sep/24]

Updates to Tenancy from EOT process:

Comment by **Nikki** [07/Oct/24]

Originally refined:

A/C 3 - End the Current Tenancy on Renewal or COS

GIVEN an opportunity has a *Tenancy Type* of 'Renewal' [Opp2]
AND the *Renewed From* field is populated [Opp1]
AND there is a tenancy [Ten1] linked to the *Renewed From* opportunity [Opp1] with a *Tenancy Status* of 'Activated'

WHEN the tenancy [Ten2] linked to the renewal opportunity [Opp2] is updated to 'Activated' per A/C1 or A/C2

THEN additionally, the tenancy [Ten1] that is linked to the *Renewed From* opportunity [Opp1] will be updated:

- The *Tenancy Status* will be updated to 'Ended'
- The *Effective End Date* will be updated to the day before the renewal opportunity's [Opp1] *Move-In Date*

Comment by **Nikki** [10/Dec/24]

Previously refined during RTR project.

Comment by **Nikki** [20/Dec/24]

Original Acceptance Criteria from RTR Project:

A/C 1 - Activate Tenancy Records for New Leases where there is a Signed Agreement (update existing functionality) [No Longer Required]

GIVEN an **opportunity** has a record type of 'Residential'
AND has (only) one associated **agreement** that is in a 'Signed' *Agreement Status*
AND the agreement is linked to a **tenancy** with a *Tenancy Type* 'New'
AND the opportunity's *Agreement Type* is not 'Decant Agreement Normal' or 'Decant Agreement Wales'

WHEN the opportunity's *Stage* is updated to 'Audit'

THEN the tenancy linked to the signed agreement is updated: *Status* and *Tenancy Status* are updated to 'Activated'

A/C 2 - Activate Tenancy Records for COS Opportunities where there is no Signed Agreement

GIVEN an **opportunity** has a record type of 'Residential'
AND has a *Tenancy Type* of 'Renewal'
AND the opportunity's *Agreement Type* is not 'Decant Agreement Normal' or 'Decant Agreement Wales'
AND

- The opportunity has (only) one associated agreement that is in a 'Signed' *Agreement Status*
- OR the opportunity does **not** have any agreements in a 'Signed' *Agreement Status*
AND the opportunity has (only) one associated agreement in a 'Draft' *Agreement Status*

WHEN the opportunity's *Stage* is updated to 'Closed Won'

THEN the tenancy linked to the above agreement is updated: *Status* and *Tenancy Status* are updated to 'Activated'.

A/C 3 - Add 'Effective End Date' to Prior Tenancies

GIVEN a renewal opportunity and linked agreement meet all the pre-conditions in A/C 2
AND the agreement's tenancy's *Unit* is linked to one or more **other** tenancy records:

- With *Tenancy Status* of 'Activated'
- AND *Agreement Type* is not 'Decant Agreement Normal' or 'Decant Agreement Wales'

WHEN the tenancy linked to the renewal opportunity is 'Activated' per A/C2

THEN additionally, the **other** activated tenancy record(s) for the unit will be updated:

- The *Effective End Date* will be populated with the day before the renewal tenancy's *Tenancy Start Date*

A/C 4 - End the Current Tenancy on Renewal or COS

GIVEN a tenancy has a *Tenancy Status* of 'Activated'
AND the *Effective End Date* is populated with a date that falls in the past
WHEN the daily process runs
THEN the *Tenancy Status* will be updated to 'Ended'.

SVOT - Keep Tenancies Updated & Synced with Qube (CJR-393)

[CJR-43] Update/End Tenancy, Contract & Tenancy Contact Roles on EOT Check Out Created: 08/Oct/24 Updated: 02/May/25 Resolved:

13/Feb/25

Status:	Done
Project:	Customer Journey - Renewals Project
Components:	None
Affects versions:	None
Fix versions:	Sprint 2
Parent:	SVOT - Keep Tenancies Updated & Synced with Qube

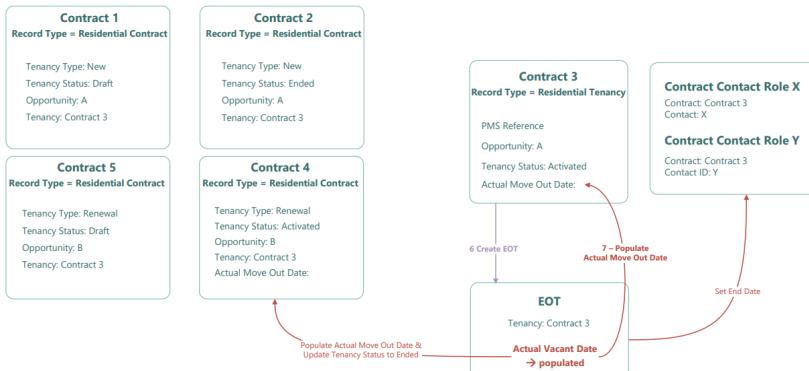
Type:	Story	Priority:	Priority 3
Reporter:	Nikki	Assignee:	Mudzunga Khonani Davhana
Resolution:	Done	Votes:	0
Labels:	Dev_Reviewed, OpenBox, Prod_Approved, SVOC, Show_Me_Complete, UAT		
Σ Remaining Estimate:	Not Specified	Remaining Estimate:	Not Specified
Σ Time Spent:	Not Specified	Time Spent:	Not Specified
Σ Original Estimate:	Not Specified	Original estimate:	Not Specified

Attachments:					
Issue links:	Blocks				
	blocks	CJR-49	EXCLUDE - Update EOT to Source Latest...	Done	
	blocks	CJR-187	Update EOT to Source Latest Passing R...	Done	
	Relates				
	relates to	CJR-47	Data Migration - Create Tenancy for a...	Done	
	relates to	CJR-95	'Decant Agreement Normal' or 'Decant...	Done	
	relates to	CJR-96	{Not a bug}End Date not updated when ...	Done	
	relates to	CJR-122	Create a Tenancy for a Decant Agreement	Done	
	relates to	CJR-203	UAT - H TEGGART - Tenancy remains act...	Done	
Sub-tasks:	Key	Summary	Type	Status	Assignee
	CJR-88	QA	Subtask	Done	
Story point estimate:	5				
Sprint:	CJR Sprint 1				
Rank:	2 j0193h:8i				

Description

As a user, I want to create an EOT for the tenancy, so that I am not creating an EOT for an old contract that has already ended.

End of Tenancy



A/C 1 - EOT can only be created for Active Tenancies

GIVEN a tenancy has a *record type* of 'Residential Tenancy'

AND has the *Tenancy Status* of 'Activated'

WHEN a user is viewing the tenancy screen then the existing '**Create End of Tenancy**' button will be available. [subject to existing permissions]

GIVEN a tenancy has a *Tenancy Status* of 'Draft', 'In Approval Progress' or 'Ended'

OR a *record type* that is not 'Residential Tenancy'

WHEN a user is viewing the tenancy screen then the existing 'Create End of Tenancy' button will **not** be visible.

A/C 2 - Update Existing Logic to End Tenancy from EOT

WHEN the EOT *Check Out* task is completed (i.e. the *Actual Vacant Date* is populated) [for any EOT Template]

THEN (per existing logic) the *Actual Move Out Date* on the linked tenancy will be updated with the EOT's *Actual Vacant Date*

AND the linked tenancy's *Tenancy Status* will no longer be updated.

A/C 3 - End the Contract from EOT Check Out

GIVEN a contract record has a *record type* of 'Residential Tenancy'

AND has a child *contract* record with *Tenancy Status* is 'Activated'

AND the child contract's *Agreement Type* is not 'Decant Agreement Normal' or 'Decant Agreement Wales' [this criteria to be removed in <https://graingerplc.atlassian.net/browse/CJR-122>]

WHEN the *Actual Move Out Date* is populated on the **tenancy** record

- Either edited directly on the tenancy details screen, or
- Populated via A/C 2.

THEN the **child contract** will be updated:

- *Actual Move Out Date* = tenancy's *Actual Move Out Date*
- *Tenancy Status* = 'Ended'

A/C 4 - End Tenancy Contact Roles from EOT Check Out [to be removed in <https://graingerplc.atlassian.net/browse/CJR-118>]

GIVEN a contract record has a *record type* of 'Residential Tenancy'

AND has one or more **tenancy contact roles** with no end date

WHEN the *Actual Move Out Date* is populated on the tenancy record (per A/C 3)

THEN those tenancy contact role(s) will be updated:

- *End Date* = tenancy's *Actual Move Out Date*

Comments

Comment by **Nikki** [10/Dec/24]

Previously refined during RTR project.

Comment by **Akshat Jain** [05/Feb/25]

Hi, Sam Duncan As per our discussion in A/C 3 these two values are not present on Contract object's Agreement Type field, so adding 'Decant Agreement Normal' and 'Decant Agreement Wales' on Agreement Type picklist on Contract object for 'Residential Contract' and 'Residential Tenancy' record types.

cc: Nikki

Comment by **Akshat Jain** [07/Feb/25]

Hi, Sam Duncan A/C 1 is not clear to me regarding the visibility of '**Create End Of Tenancy**' button for 'Residential Contract' and 'Commercial Contract' record types.

Comment by **Sam Duncan** [07/Feb/25]

Akshat Jain I've updated to remove "AND/OR" with "OR" - does that help?

A/C 1 - EOT can only be created for Active Tenancies

GIVEN a tenancy has a *record type* of 'Residential Tenancy'

AND has the *Tenancy Status* of 'Activated'

WHEN a user is viewing the tenancy screen then the existing '**Create End of Tenancy**' button will be available. [subject to existing permissions]

GIVEN a tenancy has a *Tenancy Status* of 'Draft', 'In Approval Progress' or 'Ended'

OR a *record type* that is not 'Residential Tenancy'

WHEN a user is viewing the tenancy screen then the existing 'Create End of Tenancy' button will **not** be visible.

Comment by **Akshat Jain** [07/Feb/25]

Sam Duncan according to the updated A/C the '**Create End of Tenancy**' button will be available on 'Residential Tenancy' record type only and not on 'Residential Contract' or 'Commercial Contract' record types, Is that correct?

Comment by **Sam Duncan** [07/Feb/25]

Akshat Jain yes, correct. The user has to view the Tenancy (not the "child contract") when creating an End of Tenancy.

Comment by **Akshat Jain** [07/Feb/25]

Sam Duncan Noted! I will make the changes.

cc: Mudzunga Khonani Davhana