

User Guide:

Salesforce Tenancy Review

Version History

Version	Description of Change	Author	Date
1.0	First Version	Nikki Papenfus	08/09/2025

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1. Overview

Tenancy reviews are typically conducted when a fixed-term lease comes up for renewal, or annually for periodic tenancies. Rent will be increased on tenancy review.

The tenancy review process will be monitored according the following timeline:

Timeline Relative to the <i>Tenancy Review Date</i>	
Tenancy review opportunity is automatically created.	21 weeks prior
Asset managers receive reminder email to set the new rent.	16 weeks prior to the start of the rent review month
Deadline for asset managers to approve to new rent.	14 weeks prior
Deadline to send the 1 st offer / notification of upcoming rent increase to the tenant.	12 weeks prior
Deadline to send the renewal contract or formal notification of rent increase (e.g. Section 13) to the tenant.	9 weeks prior
Rent increase comes into effect.	Tenancy Review Date

2. Creating a Tenancy Review Opportunity

Tenancy Review opportunities will be automatically created 21 weeks prior to the next tenancy review date, however a tenancy review opportunity may be manually created if necessary.

- Navigate to the **tenancy** and select the '**Create Tenancy Review**' button. The button will only be available for current residential tenancies.

The next **Tenancy Review Date** is:

- The *Deferred Rent Review Date* if any, otherwise
- The *Next Rent Review Date* if any, otherwise
- The day after the *Tenancy End Date*.

- Update the default *Tenancy Review Date* if required, and select 'Next':

3. Rent Approval

Asset Managers will set the target & minimum rent review price for each tenancy review opportunity in the **Rent Approval** screen.

- **Filters** - The Rent Approval list can be filtered by selecting the required filter options and clicking on '**Apply Filter**'.
 - Select '**Reset Filter**' to remove all selected filter options, select new options, and then click on '**Apply Filter**' again.

Rent Approval Reviews In Progress Estate Performance Growth On Rent Reports Formal Challenges

Filters

Asset Manager

Opportunity Owner

Review Month

Block

Approval Due Urgently

Apply Filter Reset Filter

Click to hide & show the filter section.

Month in which the rent is due to increase.

Tick to only display tenancy reviews that need to be approved in the next week, or are already overdue.

- **Approval Due Urgently** - A red flag 🚨 in the first column indicates that rent approval is due today or is overdue. An amber flag 🟠 indicates that rent approval is due in the next week. Hover over the flag to see the exact due date.

Rent Approval Reviews In Progress Estate Performance Growth On Rent Reports Formal Challenges

Filters

Review Month

Portfolio

Estate

Unit

Agreement Type

Tenure

Current Rent

Previous ERV

Latest ERV

Current Rent / Latest ERV

Price Book Rent

Price Book / Current Rent

AM Rent Review Price

AM Rent Review / Current Rent

AM Rent Review / Latest ERV

AM Minimum Rent Review Price

Update Rent Review Price Approve Defer Tenancy Review

Hover over the unit to see additional unit information.

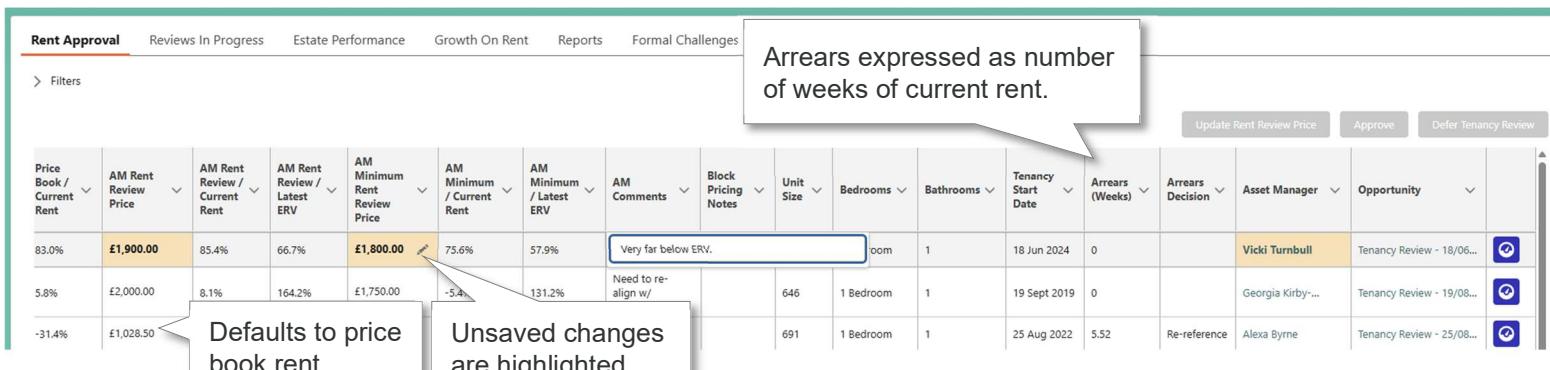
Hover over an urgent review flag to see the due date:

Rent Approval Due Date
07 May 2025

Hover over the latest or previous ERV values to see the applicable month & year:

Price Book Name
ERV Sept 2024

- Select the dashboard icon  to open the [Estate Performance Dashboard](#), pre-filtered by the corresponding estate, number of bedrooms & bathrooms, to see recent rent achieved on similar units.
- The following information can be updated in the Rent Approval list:
 - AM Rent Review Price** – Target rent; required to be set for every tenancy review. This value will default to the **Price Book Rent**, but can be updated.
 - AM Minimum Rent Review Price** – Required to be set for every tenancy review.
 - AM Comments** – Optional
 - Asset Manager** – Can be updated if an asset manager is on leave, for example.

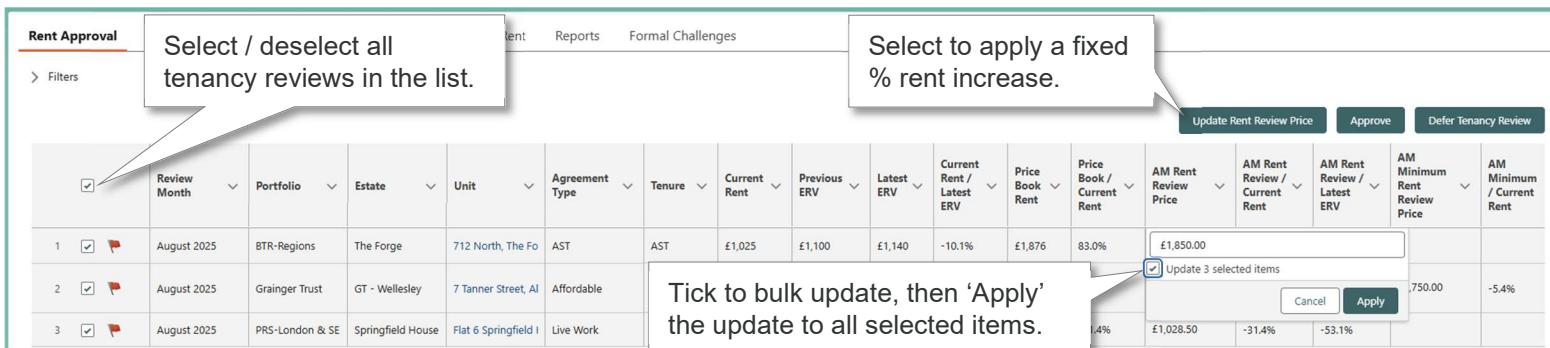


Arrears expressed as number of weeks of current rent.

Defaults to price book rent.

Unsaved changes are highlighted.

- Unsaved changes** are highlighted & are only saved when the user selects **Save** at the bottom of the screen, or approves the tenancy review (see below).
 - Unlike approval, when the user selects ‘Save’ the tenancy review will remain in the *Rent Approval* screen and the saved changes may be updated at a later time.
- Bulk Updates** – To update multiple tenancy reviews with the same value or comment:
 - Select some or all of the tenancy reviews listed using the checkboxes.
 - Update one of the values, tick the box to update the selected items, and ‘Apply’.
 - Save the changes.



Select / deselect all tenancy reviews in the list.

Select to apply a fixed % rent increase.

Tick to bulk update, then ‘Apply’ the update to all selected items.

- Apply a Fixed % Rent Increase** – To calculate the **AM Rent Review Price** as a percentage increase on current rent:
 - Select one or more of the tenancy reviews using the checkboxes.
 - Select the ‘**Update Rent Review Price**’ button.

- Enter the % increase on current rent.
- Select the values to update - *AM Rent Review Price*, or both *AM Rent Review Price & AM Minimum Rent Review Price*.
- Select 'Submit'.
- Save the changes.

Update Rent Review Price

*Increase on Current Rent
5.25%

Update AM Rent Review Price only
 Update AM Rent Review Price & AM Minimum Rent Review Price

Submit

- **Approval** – Once the *AM Rent Review* and *AM Minimum Rent Review Prices* are finalised, the tenancy review can be approved.
 - These prices must both be populated in order to approve.
 - Select one or more of the tenancy reviews using the checkboxes, and then click the '**Approve**' button.
 - Once a tenancy review is approved, it will no longer appear in the Rent Approval screen. The rent review amounts are committed and ready to be communicated to tenants.

	Review Month	Portfolio	Estate	Unit	Agreement Type	Tenure	Current Rent	Previous ERV	Latest ERV	Current Rent / Latest ERV	Price Book Rent	Price Book / Current Rent	AM Rent Review Price	AM Rent Review / Current Rent	AM Rent Review / Latest ERV	AM Minimum Rent Review Price
1	<input type="checkbox"/>	August 2025	BTR-Regions	The Forge	712 North, The Fo	AST	AST	£1,025	£1,100	£1,140	-10.1%	£1,876	83.0%	£1,876.00	83.0%	64.6%
2	<input checked="" type="checkbox"/>	August 2025	Grainger Trust	GT - Wellesley	7 Tanner Street, Al	Affordable	Aff Rent	£1,850	£698	£757	144.4%	£1,957	5.8%	£2,000.00	8.1%	164.2%
3	<input checked="" type="checkbox"/>	August 2025	PRS-London & SE	Springfield House	Flat 6 Springfield I	Live Work	Live Work	£1,500	£2,115	£2,195	-31.7%	£1,029	-31.4%	£1,028.50	-31.4%	-53.1% £950.00

- **Defer Tenancy Review** – Asset Managers will be able to defer tenancy reviews to a later month where required.
 - Select one or more of the tenancy reviews using the checkboxes.
 - Click the '**Defer Tenancy Review**' button.

Defer Tenancy Review

*Deferred Rent Review Date
1 Jan 2026

*Reason Rent Review Deferred
Arrears
Churn Management
Disrepair Issue
For Sale
Major Works

Enter the new rent review date that will be applied to all of the selected tenancies as well as the applicable reason(s), and 'Submit'

Submit

- Once deferred, any rent review prices or AM comments previously saved will be deleted. The tenancy review will be re-priced at the appropriate future time, based on the new rent review date, price book rent & ERVs at that time.

4. Growth on Rent

Asset Managers can use the **Growth on Rent** screen to evaluate rent review prices during the rent approval process. These figures incorporate both approved and unapproved tenancy review prices.

Note that this screen is intended to provide a worst-case scenario growth figures for use during the pricing process. It does not reflect the growth on current rent or growth on ERV that is actually achieved.

Select a **portfolio** and **review month** to see a summary of the growth on current rent and growth on ERV based on the following:

- **AM Minimum Rent Review Price** – Original minimum as set by the asset manager on the [Rent Approval](#) screen.
- **AM Minimum Rent to Offer** – The original minimum unless there is counteroffer lower than the minimum that has been approved by the Asset Manager, in which case the lower counteroffer value is used.

The screenshot shows the 'Tenancy Review' section of the Salesforce interface. The 'Growth On Rent' tab is selected. A callout box points to the 'Number of tenancy reviews per estate' section, which includes a table with columns: Record Count, f_x Growth on Latest ERV, f_x Growth on Passing/ Current Rent, f_x AM Min Growth on Latest ERV, and f_x AM Min Growth on Passing/Current Rent. Below this is a table for 'Minimum Growth on Rent' with columns: Primary Offer, Unit, Estate, Sum of Latest ERV, Sum of Passing/Current Rent, Sum of AM Minimum Rent to Offer, and Sum of AM Minimum Rent Review Price. The table includes data for The Copper Works, The Filaments, and The Forge, along with a total row. A 'View Report (Minimum Growth on Rent)' button is visible at the bottom left.

Record Count	f _x Growth on Latest ERV	f _x Growth on Passing/ Current Rent	f _x AM Min Growth on Latest ERV	f _x AM Min Growth on Passing/Current Rent
2	-57.03%	-43.59%	-57.03%	-43.59%
1	70.73%	5.00%	70.73%	5.00%
3	-54.73%	-65.31%	-54.73%	-65.31%
6	-34.77%	-44.30%	-34.77%	-44.30%

Primary Offer, Unit, Estate	Sum of Latest ERV	Sum of Passing/Current Rent	Sum of AM Minimum Rent to Offer	Sum of AM Minimum Rent Review Price
The Copper Works	2,560	1,950.00	1,100	£1,100.00
The Filaments	1,230	2,000.00	2,100	£2,100.00
The Forge	3,645	4,757.00	1,650	£1,650.00
Total	7,435	8,707.00	4,850	£4,850.00

- Select '[View Report](#)' to see more details.
 - Ensure that an *AM Minimum Rent Review Price* has been captured for all of the underlying tenancy reviews on the report. Missing minimums will result in incorrect growth percentages.

USER GUIDE (SALESFORCE TENANCY REVIEW)

grainger plc

Total Records	Total Reviews with no AM Minimum	Total Latest ERV	Total Passing/Current Rent	Total AM Minimum Rent to Offer	Total AM Minimum Rent Review ...	Growth on Latest ERV	Growth on Passing/ Current Rent	Record Count	f _x Growth on L
6	3	7,435	8,707.00	4,850	£4,850.00	-34.77%	-44.30%		
<input type="checkbox"/> Primary Offer: Unit: Portfolio ↑ ↓	Primary Offer: Unit: Estate ↑ ↓	Sum of Reviews with no AM Minimum	Sum of Latest ERV	Sum of Passing/Current Rent	Sum of AM Minimum Rent to Offer	Sum of AM Minimum Rent Review Price	Record Count	f _x Growth on L	
<input type="checkbox"/> BTR-Regions	The Copper Works	1	2,560	1,950.00	1,100	£1,100.00	2		
	The Filaments	0	1,230	2,000.00	2,100	£2,100.00	1		
	The Forge	2	3,645	4,757.00	1,650	£1,650.00	3		
	Subtotal	3	7,435	8,707.00	4,850	£4,850.00	6		
Total		3	7,435	8,707.00	4,850	£4,850.00	6		

Row Counts Detail Rows Subtotals Grand Total

Red indicates AM Minimum Rent Review Prices still need to be captured for some of the tenancy reviews.

- Toggle the 'Detailed Rows' option on, to see the values for each underlying tenancy review:

Total Records	Total Reviews with no AM Minimum	Total Latest ERV	Total Passing/Current Rent	Total AM Minimum Rent to Offer	Total AM Minimum Rent Review ...	Growth on Latest ERV	Growth on Passing/ Current Rent	Record Count	f _x Growth on L
6	3	7,435	8,707.00	4,850	£4,850.00	-34.77%	-44.30%		
<input type="checkbox"/> Primary Offer: Unit: Portfolio ↑ ↓	Primary Offer: Unit: Estate ↑ ↓	Reviews with no AM Minimum	Opportunity Name	f _x Latest ERV ↑ ↓	Passing/Current Rent	AM Minimum Rent t...	AM Minimum Rent Rev...		
<input type="checkbox"/> BTR-Regions (6)	The Copper Works (2)	0	Tenancy Review - 12/08/2025 - 212, 5 Capital Quarter, Tyndall St., Cardiff	1,254	1,000.00	1,100	£1,100.00		
		1	GREP-CoA Jessica Debono and Lydia Anne Tibbet - 401, 5 Capital Quarter, Tyndall St., Cardiff	1,306	950.00	0	-		
	Subtotal	1		2,560	1,950.00	1,100	£1,100.00		
	The Filaments (1)	0	GREP-CoA Karolina Nowak and Harry Feest - 202, Neon House, 207 Chapel St, Salford, M3 5	1,230	2,000.00	2,100	£2,100.00		
	Subtotal	0		1,230	2,000.00	2,100	£2,100.00		
	The Forge (3)	1	GREP-CoA Steven Headland - 302 West, The Forge, Newcastle, NE1 3AJ	1,080	1,035.00	0	-		
		1	Tenancy Review - 18/06/2025 - 712 North, The Forge, Newcastle, NE1 3AH	1,140	2,222.00	0	-		
		0	Tenancy Review - 1/08/2025 - 102 North, The Forge, Newcastle, NE1 3AA	1,425	1,500.00	1,650	£1,650.00		
	Subtotal	2		3,645	4,757.00	1,650	£1,650.00		
Subtotal		3		7,435	8,707.00	4,850	£4,850.00		
Total (6)		3		7,435	8,707.00	4,850	£4,850.00		

Row Counts Detail Rows Subtotals Grand Total

5. Estate Performance Dashboard

The **Estate Performance** screen provides information to support pricing decisions, such as recent rent achieved.

Rent Approval Reviews In Progress **Estate Performance** Growth On Rent

Dashboard Rental Performance by Estate
As of 4 Sept 2025, 11:59 Viewing as Vicki Turnbull

Estate Bedrooms Bathrooms
equals Abbeville Apartments equals 1 Bedroom equals 1

Open Refresh Subscribe

- Recent Rent Achieved on New Lets** - Lists the most recent new let opportunities that have been finalised (in 'Audit' or 'Closed Won') based on lease start date.
- Recent Rent Achieved on Tenancy Reviews** - Lists the most recent tenancy review & renewal opportunities that have been finalised (in 'Audit' or 'Closed Won') based on the date of rent increase.
- Available Units** – Shows the number of available live units by block and floor.

Recent Rent Achieved - New Lets

Unit Plot No.	Contract Start Date	Rent	Rental growth	Unit: Internal Space GIA ft ²	Unit: Floor...	Unit: View	Unit: Balcony Type
Apt 505, Abbeville Apts, 37 London Rd, Barkin	15/05/2025	£1,525	0%	538	5	Rear	-
Apt 303, Abbeville Apts, 37 London Rd, Barkin	30/04/2025	£1,360	0%	582	3	Rear	-
Apt 104, Abbeville Apts, 37 London Rd, Barkin	16/04/2025	£0	0%	538	1	Rear	-
Apt 208, Abbeville Apts, 37 London Rd, Barkin	14/04/2025	£1,275	0%	574	2	London Rd	-
Apt 113, Abbeville Apts, 37 London Rd, Barkin	11/04/2025	£0	0%	538	1	North St	Terrace
Apt 509, Abbeville Apts, 37 London Rd, Barkin	11/03/2025	£1,247	0%	538	5	Entrance	-

View Report (Recent Rent Achieved - New Lets) As of 4 Sept 2025, 11:59

Available Units

Building: Block	Unit: Floor Level	Average Rent (Default)	Average Unit: Internal Space GIA ft ²	Record Count
Abbeville - Apartments	1	£1,510	538	1
	6	£1,315	538	1
Total		£1,413	538	2

Number of available units

Recent Rent Achieved - Tenancy Reviews

Unit Plot No.	Contract Start Date	Rent	Rental growth	Rent / Latest E...	Unit: Internal ...	Unit: Floor...	Unit: View	Unit: Balcony T...
Apt 109, Abbeville Apts, 37 London Rd, Barkin	15/04/2025	£1,600	-84%	0%	538	1	Entrance	-
Apt 304, Abbeville Apts, 37 London Rd, Barkin	26/03/2025	£0	0%	0%	538	3	Rear	-
Apt 508, Abbeville Apts, 37 London Rd, Barkin	12/03/2025	£1,550	0%	0%	574	5	London Rd	-

View Report (Recent Rent Achieved - Tenancy Reviews) As of 4 Sept 2025, 11:59

View Report (Available Residential Units) As of 4 Sept 2025, 11:59

Click 'View Report' to see more information:

Report: Pricebook with PricebookEntries and Units (custom)
Available Residential Units

Total Records: 2 Total Unit: Internal Space GIA ft²: 1,076.00 Total Rent (Default): £2,825.00

Building: Block	Unit: Plot No.	Unit: Floor ...	Unit: Floorplan ...	Unit: Bedrooms	Unit: Bathrooms	Unit: Internal S...	Aspect	Unit: Balcony Type	Unit: View	Unit: Furnished	Rent (Default)	MRI Unit
Abbeville - Apartments (2)	Apt 113, Abbeville Apts, 37 London Rd, Barkin	1	A	1 Bedroom	1	538.00	West	Terrace	North St	Furnished	£1,510.00	Tenanted
	Apt 604, Abbeville Apts, 37 London Rd, Barkin	6	A	1 Bedroom	1	538.00	South	-	Rear	Furnished	£1,315.00	Tenanted
Total (2)						1,076.00						

6. Reviews in Progress

Negotiators can monitor tenancy review opportunities in the **Reviews In Progress** screen.

Tenancy review opportunities will only appear in this list once the rent review price has been approved by Asset Managers in the [Rent Approval](#) screen. Licences are the exception, they are not approved by Asset Management and will appear in the list immediately, once created.

- **Filters** - The list of tenancy reviews can be filtered by selecting the required filter options and clicking on '**Apply Filter**'.
 - Select '**Reset Filter**' to remove all selected filter options, select new options, and then click on 'Apply Filter' again.

The screenshot shows the 'Tenancy Review' page with the 'Reviews In Progress' tab selected. A callout box points to the 'Filters' button and says 'Click to hide & show the filter section.' Another callout box points to the 'Deadline Month' dropdown and says 'Filters by the deadline date for sending documents.' The filters section includes fields for Opportunity Owner (Sophie Farr), COS Opportunity (Yes), Deadline Month (set to August 2025), Stage (Informal Challenge), Agreement Type (AST), and various other filters like BTR-Regions and Estate. The main table lists tenancy reviews with columns for Deadline Date, Initial Offer Due Date, Opportunity, Account, Agreement Type, Stage, Sub Stage, COS, Arrears (Weeks Rent), Arrears Decision, RTR Outstanding, Tenancy Issues, Days Since Last Activity, Days Since Last Offer Sent, Days Since Offer Agreed, GPLC Notice Initiated, and Tenancy. A specific row is highlighted with a red border.

- **Deadline Date & Deadline Month** refer to the date by which the applicable document (renewal contract, Section 13, RHW12, etc.) must be sent to the tenant; i.e. 9 weeks prior to the tenancy review date.

The screenshot shows the 'Tenancy Review' page with the 'Reviews In Progress' tab selected. A callout box points to a column heading and says 'Click on column heading to sort.' Another callout box points to a note field and says 'Hover over for notes captured on the tenancy review.' A third callout box points to a flagged row and says "'Last Activity' includes user updates or online responses from a tenant.' The fourth callout box points to a flagged row and says 'Flagged on the tenancy.' The main table lists tenancy reviews with columns for Deadline Date, Initial Offer Due Date, Opportunity, Account, Agreement Type, Stage, Sub Stage, COS, Arrears (Weeks Rent), Arrears Decision, RTR Outstanding, Tenancy Issues, Days Since Last Activity, Days Since Last Offer Sent, Days Since Offer Agreed, GPLC Notice Initiated, and Tenancy. Some rows have red flags indicating activity or flagged status.

- **Deadline Date** is colour-coded:
 - **Red** = Deadline to send documents has been reached or overdue.
 - **Amber** = Documents are due in the next week.
 - **Green** = Documents have been sent.
- **Initial Offer Due Date** - The deadline for sending the 1st offer to the tenant; i.e. 9 weeks prior to the tenancy review date.
 - **Red** = Deadline has been reached or overdue.
 - **Amber** = Initial offer is due in the next week.
 - The date does not display at all once the initial offer has been sent.
- **Arrears (Weeks Rent)** – Displays any current arrears balance for the tenancy expressed as weeks' worth of current rent. This value is colour-coded where there are outstanding arrears:
 - **Red** = No *Arrears Decision* has been captured on the tenancy review.
 - **Amber** = Where *Arrears Decision* is 'Awaiting Credit Control Feedback'.
 - **Green** = Once any other *Arrears Decision* has been captured.
- **RTR Outstanding** – The overall Right-to-Rent status for the opportunity where the agreement type requires RTR information to be captured. See also [Right-to-Rent Information](#).
 -  - A new RTR is required from one or more tenants.
 -  - One or more tenants have a RTR in 'RTR Not Required' status.
 -  - All tenants have a RTR that is valid as at the tenancy review date.

Tenancy review opportunities will no longer appear on this screen once they progress to 'Audit' or when in 'Formal Challenge' stage. See the report of current [Formal Challenges](#).

7. Tenancy Review Opportunity Details

A tenancy review opportunity will progress through a series of stages:

Tenancy Review Opportunity Stages	
Rent Review Approval	Asset Management has not yet approved the new rent.
Send Rent Review	New rent has been approved. Negotiators can review the opportunity & send the offer.
Rent Review Sent <i>Sub stages:</i> <ul style="list-style-type: none">• <i>Not Viewed</i>• <i>Viewed</i>	Offer has been sent; no response has yet been received from the tenant. Sub stage updates automatically to 'Viewed' where a tenant views the offer online but doesn't respond.
Informal Challenge <i>Sub stages:</i> <ul style="list-style-type: none">• <i>Pending AM Approval</i>• <i>AM Approved</i>• <i>AM Rejected</i>	Tenant has made a counteroffer or asked a question. Stage updates automatically where the tenant responds online. Opportunity remains in this stage until the new offer is sent. Sub stages update automatically where a counteroffer below the AM minimum progresses through the asset manager approval process.
Rent Review Agreed	Tenant has accepted the offer. Stage updates automatically where the tenant responds online.
COS <i>Sub stages:</i> <ul style="list-style-type: none">• <i>Application form sent</i>• <i>With PM for approval</i>• <i>In referencing</i>• <i>Referencing complete</i>• <i>Right to Rent in progress</i>• <i>COS fail</i>	Tenant has requested a change or sharer & awaiting related approval, documents, or referencing. Sub stages must updated manually.
Documents Sent <i>Sub stages:</i> <ul style="list-style-type: none">• <i>All signatures outstanding</i>• <i>Landlord signature outstanding</i>• <i>All Signed both parties</i>	Documents have been sent. Waiting for signature where necessary, or waiting for period to see if tenant responds to Section 13 or RHW12.
Formal Challenge	Tenant has initiated legal proceedings to dispute the rent.
Audit	Tenancy review is finalised. Qube & direct debits can be updated with the new rent.
Closed	Closed Won / Closed Lost

Tenancy review date = date of rent increase

Opportunity Tenancy Review - 01/12/2025 - 2, Brooke Court, Newlands Ave, Waterlooville

Tenancy Review Date: 01/12/2025 Unit: 2, Brooke Court, Newlands Ave, Waterlooville Rent: £1,875.00 Passing/Current Rent: 1,750.00

Send Offer Defer Tenancy Review Estate Performance Create Offer Edit

Send Rent Review Rent Review Sent Informal Challenge Rent Review Agree... COS Documents Sent Formal Challenge Audit Closed Mark Stage as Complete

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

Offer Number	Offer Name	Primary Of...	Status	Date Offer ...	Latest Response Received	Latest Follow-Up D...	Rent
1 00085957	2, Brooke Court, Newlands Ave, Waterlooville - 12 Months	<input checked="" type="checkbox"/>	Draft				£1,875.00

View All

Agreements (0)

Contact Roles (3)
3 items • Sorted by Primary • Updated a few seconds ago

Contact Name	Active	Role	Relationship	RTR Status	Email
1 Person Four	<input checked="" type="checkbox"/>	Lead Tenant		Valid	test4@gmail.com
2 Person One	<input checked="" type="checkbox"/>	Tenant		RTR Not Required	one@mail.com
3 Person Three	<input checked="" type="checkbox"/>	Tenant		New RTR Required	three@mail.com

View All

Details Related Files Activity Chatter

Select the '**Estate Performance**' button on the opportunity screen to open the [Estate Performance Dashboard](#) and see recent rent achieved on similar units. When opened via this button, the dashboard will be pre-filtered by the same estate, number of bedrooms & bathrooms as the opportunity.

The opportunity's *Details* tab contains a lot of information, however much of this is prepopulated.

- **Opportunity Details** – are mostly set when the opportunity is created; the information highlighted below can be updated where necessary.
 - *Tenancy Review Date & Review Month* will update when a tenancy review is [deferred](#).

Opportunity Details

Opportunity Name	Tenancy Review - 01/12/2025 - 2, Brooke Court, Newlands Ave, Waterlooville	<input type="button" value="Edit"/>	Opportunity Owner	Sophie Farr	<input type="button" value="Edit"/>
Account Name	Person Four	<input type="button" value="Edit"/>	Second Opportunity Owner		<input type="button" value="Edit"/>
Stage	Rent Review Agreed	<input type="button" value="Edit"/>	Asset Manager	Vicki Turnbull	<input type="button" value="Edit"/>
Sub Stage		<input type="button" value="Edit"/>	Review Month	December 2025	<input type="button" value="Edit"/>
Tenancy Type	Renewal	<input type="button" value="Edit"/>	Tenancy Review Date	01/12/2025	<input type="button" value="Edit"/>
Agreement Type	Assured	<input type="button" value="Edit"/>	Suppress Automated Renewal Chase Emails	<input type="checkbox"/>	<input type="button" value="Edit"/>
Tenure	Affordable Rent	<input type="button" value="Edit"/>	Estate	GT - Berewood	<input type="button" value="Edit"/>
Pets	Yes	<input type="button" value="Edit"/>	Portfolio	Grainger Trust	<input type="button" value="Edit"/>

- **Current Tenancy Information** – is sourced from the tenancy.
 - *Passing/Current Rent* can be edited if incorrect.
 - All other information will update immediately if changed on the tenancy.

▼ Current Tenancy Information

Tenancy	00086068	GPLC Notice Initiated	<input type="checkbox"/>
Passing/Current Rent	1,750.00		
Start Date	01/07/2025		
Tenancy End Date	31/08/2025		
Tenancy Length (Months)	3	Special Clauses	Gas, Electricity inc. in Rent Clause
Contract Term (months)	24	Special Clause Free Text	
Current Payment Periodicity	Monthly	Security Deposit Amount	£593.03

- **Review Pricing** - Contains the rent review prices approved by the Asset Manager and a snapshot of ERVs & Price Book Rent at the time of approval. This should not need to be updated.

▼ Review Pricing

AM Rent Review Price	£1,875.00	Price Book	Price Book Rent Nov 2025	
AM Rent Review / Current Rent	7.1%	Price Book Rent	£1,758.00	
AM Rent Review / Latest ERV	2.7%	Price Book / Current Rent	0.5%	
AM Minimum Rent Review Price	£1,850.00	Latest ERV Price Book	ERV March 2025	
AM Minimum Price / Current Rent	5.7%	Latest ERV	£1,825.00	
AM Minimum Price / Latest ERV	1.4%	Current Rent / Latest ERV	-4.1%	
AM Comment	Far below ERV	Previous ERV Price Book	ERV Sept 2024	
		Previous ERV	£1,798.00	

- **Review Factors** – must be reviewed and updated where applicable.

- **Arrears** – The current arrears balance for the tenancy is updated daily and is also calculated as weeks' worth of current rent. Where there are arrears:
 - Use the *Arrears Decision* to record where 'Awaiting Credit Control Feedback' and then to record the final decision.
 - Capture additional *Comments* as required.
- **COS Opportunity** – Tick where the tenant has requested a change of sharer.
- **Tenancy Issues** – Flag where there are issues that may impact the tenancy review. Where checked, additional notes may be captured.
- **RTR Outstanding** – The overall Right-to-Rent status for the opportunity where the agreement type requires RTR information to be captured.
 - See [Right-to-Rent Information](#).

▼ Review Factors

Arrears	£500.00	COS Opportunity?	<input type="checkbox"/>	
Arrears (Weeks Rent)	1.24	Tenancy Issues	<input checked="" type="checkbox"/>	
Arrears Decision	No Action Required	Tenancy Issues Notes	ASB	
Arrears Comments	Always pays at the end of the month.	RTR Outstanding		

- **Primary Offer Information** – will update automatically from the primary offer.
 - *Contract Start Date* will update when a tenancy review is deferred.

▼ Primary Offer Information

Primary Offer	2, Brooke Court, Newlands Ave, Waterlooville - Revised Offer 08/09/2025
Unit	2, Brooke Court, Newlands Ave, Waterlooville
Contract Start Date	01/12/2025
Contract End Date	30/11/2026
Rental growth	4.57%
Rent / Latest ERV	0.27%

Rent	£1,830.00
Break Clause	2 at 4 to expire at 6
Break Clause (Long Text)	The earliest you can vacate is 6 months from the start of the tenancy provided you give 2 months notice from the 4th month
Agreed Terms	12 Months
Payment Periodicity	Monthly

Text displayed when tenants view the offer.

- **Milestones** – Displays the target milestone dates (due dates) as well as the actual date on which the milestone was achieved. These should automatically update as the opportunity progresses.

▼ Milestones

Rent Approval Due Date	25/08/2025
Initial Offer Due Date	08/09/2025
Latest Offer Sent Date	07/09/2025
Deadline Date	29/09/2025

AM Sign Off Date	01/09/2025
Initial Offer Sent Date	04/09/2025
Offer Agreed Date	
Initial Document Sent Date	

- **Unit Information** – Sourced from the unit as well as the current block pricing notes; cannot be directly updated.

▼ Unit Information

Internal Space GIA ft ²	540.00
Bedrooms	1 Bedroom
Bathrooms	1
Floorplan Type	1 Bed - Type H

Floor Level	8
View	Car Park Cleared
Balcony Type	
Pricing Notes	Lift out of order until 10/25

- **Opportunity Closed Lost Reason** – as captured when the opportunity is Closed Lost. Note that if an End of Tenancy is created for tenancy that has a tenancy review opportunity in progress:

- The opportunity will be automatically updated to 'Closed Lost', with *Lost Reason* of 'Tenant Gave Notice'.
- A task will be assigned to the negotiator to notify them that the tenant gave notice and prompting them to capture renewal feedback.
- The End of Tenancy will be linked to the opportunity.

▼ Opportunity Closed Lost Reason

Lost Reason	Tenant Gave Notice
Any Questions/Comments	

End Of Tenancy	EoT-01630
----------------	-----------

7.1 Right-to-Rent Information

RTR information can be viewed in several places. These flags are only displayed where the opportunity requires RTR information to be captured.

- **RTR Outstanding** – a summary of the overall RTR status for the opportunity can be viewed in the [Reviews in Progress](#) list and in the opportunity's *Review Factors*.
 - - A new RTR is required from one or more tenants.
 - - One or more tenants have a RTR in 'RTR Not Required' status.
 - - All tenants have a RTR that is valid as at the tenancy review date.

Arrears	£500.00	COS Opportunity?	<input type="checkbox"/>
Arrears (Weeks Rent)	1.24	Tenancy Issues	<input checked="" type="checkbox"/>
Arrears Decision	No Action Required	Tenancy Issues Notes	ASB
Arrears Comments	Always pays at the end of the month.	RTR Outstanding	

- **RTR Status** – is displayed for each tenant; calculated relative to the *Tenancy Review Date*.

Contact Name	Active	Role	Relationship	RTR Status	Email
Person Three	<input checked="" type="checkbox"/>	Tenant		New RTR Required	three@openboxsoftware.com
Person One	<input checked="" type="checkbox"/>	Tenant		RTR Not Required	one@mail.com
Person Four	<input checked="" type="checkbox"/>	Lead Tenant		Valid	test41@openboxsoftware.com

- **Right to Rents** – Displays all RTR records for the tenants that are completed or in progress. Use this list to view or update individual RTR records.
 - Note that the flag in this list does not consider the *Tenancy Review Date*. Therefore a RTR may be 'Completed' and display as green or amber in this list; however if the *Date Next RTR Required* is before the *Tenancy Review Date*, then the tenant will appear with a status of 'New RTR Required' in the *Contact Roles* list (above) and the opportunity cannot be completed until a new RTR is obtained.

Right to Re...	RTR Validity	Tenant	Status	Time Limited	RTR Expiry	Date Next R...
1 RTR-00022520		Person Three	Completed	<input checked="" type="checkbox"/>	17 Sept 2025	17 Sept 2025
2 RTR-00022518		Person One	RTR Not Required			
3 RTR-00022619		Person Four	Completed	<input checked="" type="checkbox"/>	14 Aug 2025	30 Jun 2026

7.2 Set Licence Prices

Tenancy reviews for **parking and shed licenses** are not priced by Asset Management. For these opportunities, the new rent must be set by either of the following methods:

- If price book rent has been saved in Salesforce for the unit:
 - Select the '**Update Rent**' button on the opportunity.
 - The price book rent for the tenancy review month will be saved on the opportunity and the offer.

Opportunity
Tenancy Review - 1/08/2025 - Parking U8, Solstice Apts, Silbury Blvd

Tenancy Review Date 01/08/2025	Unit Parking U8, Solstice Apts, Silbury Blvd	Rent £0.00	Passing/Current Rent 45.00
-----------------------------------	---	---------------	-------------------------------

Actions: Update Rent, Send Offer, Defer Tenancy Review, Estate Performance, Create Offer

Offers (1)
1 item • Sorted by Status • Updated a few seconds ago

Offer Number	Offer Name	Primary Offer	Status	Date Offer	Latest Resp...	Latest Follow-Up...	Rent	Cou...
1 00086438	Parking U8, Solstice Apts, Silbury Blvd - Initial Offer	<input checked="" type="checkbox"/>	Draft				£0.00	

Buttons: Send Rent R..., Rent Review..., Informal Ch..., Rent Review..., COS, Documents ..., Formal Chall..., Audit, Closed, Mark Stage as Complete

- Manually capture the rent on the **offer**:
 - Select the 'Edit Product's button on the offer's *Related* tab.

Offer
Parking U8, Solstice Apts, Silbury Blvd - Initial Offer

Status Draft	Rent £0.00	Opportunity Name Tenancy Review - 1/08/2025 - Parking U8, Solstice Apts, Silbury Blvd	Account Name Martin Isaacs
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Actions: Estate Performance, Edit, Respond to Counteroffer

Offer Responses (0)

Tab: Details **Related**

Offer Line Item (1)

Product	Rent (Offered)	Quantity	Subtotal
Parking U8, Solstice Apts, Silb...	£0.00	1.00	£0.00

Related: Tenancy Review Pricing

- Passing/Current Rent
45.00
- AM Rent Review Price
- AM Rent Review / Current Rent

- Enter the new rent as the 'Rent (Offered)' & save:

Edit All Offer Line Item

*Product	Rent (Default)	*Rent (Offered)	*Quantity	Discount (Percentage)
1 Parking U8, Solstice Apts, Silbury Blvd	£0.00	450.00	1.00	

7.3 Offer Details

The offer will progress through a series of **statuses**:

Draft	• Offer has not been sent to the tenant.
Presented	• Offer has been sent to the tenant; no response yet received.
Tenant Response	• Tenant has responded with a counteroffer or question.
Counteroffer	• Counteroffer is pending approval by Asset Manager. • Counteroffer has been accepted or rejected.
Accepted	• Tenant has accepted the offer.
Voided	• Offers are automatically voided and replaced by a new offer where a tenancy review is deferred.

- The offer status will update automatically when offers are sent through Salesforce, the tenant responds online, and when counteroffers are managed & approved in Salesforce.

An **initial offer** is automatically created when the tenancy review is generated.

- Offer information such as term, payment periodicity, break clause and special clause defaults to the current tenancy details.
- Rent is set when the Asset Manager approves the *AM Rent Review Price*.

Review the default offer information and update if necessary.

The screenshot shows the Salesforce interface for managing offers. At the top, there's a navigation bar with links for Home, Leads, Accounts, Tenancy Review, Contacts, and Tenancies. Below the navigation is a search bar and a message indicating it opens the Estate Performance Dashboard. The main area displays an offer for "2, Brooke Court, Newlands Ave, Waterlooville - 12 Months". A status bar at the top shows the offer's progression from Draft to Voided. On the left, there's a sidebar with "Offer Responses (0)" and tabs for Details and Related. The Details tab is active, showing sections for Offer Details and Offer Information. The Offer Details section contains fields for Offer Name, Opportunity Name, Account Name, Primary Offer (which is checked), and Tenancy Type (Renewal). The Offer Information section contains fields for Rent (£1,875.00), Term (12 Months), Payment Periodicity (Monthly), and Special Clause (Gas, Water, Electricity inc. in Rent Clause). A callout box points to the Offer Details section with the text "Offer details section should not need to be manually updated". Another callout box points to the Offer Information section with the text "Review & update". On the right, there's a panel for "Tenancy Review Pricing" which lists various rent-related fields: Passing/Current Rent (£1,750.00), AM Rent Review Price (£1,875.00), AM Rent Review / Current Rent (7.1%), AM Rent Review / Latest ERV (2.7%), AM Minimum Rent Review Price (£1,850.00), AM Minimum Price / Current Rent (5.7%), AM Minimum Price / Latest ERV (1.4%), AM Comment (Far below ERV), Price Book Rent (£1,758.00), Price Book / Current Rent (0.5%), and Latest ERV Price Book. A callout box on the right side of this panel states "Pricing information as seen by the Asset Manger when approving the new rent."

Where the offer is flagged as the '**Primary Offer**', updating the offer information will automatically update the 'Primary Offer Information' on the opportunity.

For a **periodic tenancies**, or where a tenancy is changing to periodic: Select 'N/A' for the *Term* and *Break Clause*:

The screenshot shows the Grainger PLC Salesforce interface. The top navigation bar includes links for Home, Leads, Accounts, Tenancy Review, Contacts, Tenancies, Opportunities, Units, Tasks, Reports, Dashboards, and More. A search bar is at the top right. Below the navigation is a breadcrumb trail: Offer > 2, Brooke Court, Newlands Ave, Waterlooville - N/A. On the right, there are buttons for Estate Performance and Edit. The main content area has tabs for Details and Related. Under Details, there are sections for Offer Details and Offer Information. The Offer Information section contains fields for Rent (£1,875.00), Uplift (4.00%), Term (N/A), Break Clause (N/A), Payment Periodicity (Monthly), Wish List, Special Clause Free Text, and Gas, Water, Electricity inc. in Rent Clause. The 'Term' and 'Break Clause' fields are highlighted with an orange border. To the right, a sidebar titled 'Tenancy Review Pricing' lists various rent-related metrics like Passing/Current Rent (£1,750.00) and AM Rent Review Price (£1,875.00).

It should generally not be necessary to **manually create a new offer** on a tenancy review opportunity, however if required:

- Select the 'Create Offer' button on the opportunity.
- Refresh the *Offers* related list to see the new offer.
- Update the previous primary offer: Untick the 'Primary Offer' box.
- Update the new offer as required and tick the 'Primary Offer' box.

The screenshot shows the Grainger PLC Salesforce interface. The top navigation bar includes links for Home, Tenancy Review, Leads, Accounts, Contacts, Opportunities, Tenancies, Blocks, Buildings, Units, Tasks, Notes, Reports, and More. A search bar is at the top right. Below the navigation is a breadcrumb trail: Opportunity > Tenancy Review - 10/10/2025 - 129 Millwrights Place, Temple Back, Bristol. On the right, there are buttons for Create Contract, Estate Performance, Create Offer, Edit, Log a Call, and a dropdown menu. The main content area shows details for the opportunity: Tenancy Review Date (10/10/2025), Unit (129 Millwrights Place, Temple Back, Bristol), Rent (£2,025.10), and Passing/Current Rent (£1,140.00). Below this is a timeline with stages: Rent Review Sent, Informal Challenge, Rent Review Agreed, COS, Documents Sent, Formal Challenge, Audit, and Closed. A 'Mark Stage as Complete' button is shown with an orange arrow pointing to it. At the bottom, there is a table for Offers (1) with columns for Offer Number, Offer Name, Primary Offer, Status, Date Offer Sent, Latest Response, Latest Follow-up, Rent, and Counteroffer. The first offer listed is for 129 Millwrights Place, Temple Back, Bristol - 1 Month, status Presented, sent on 08/09/2025, and rent £2,025.10. There is a 'View All' link at the bottom of the offers table.

8. Send an Offer

Once the offer details have been reviewed, the primary offer can be sent to the tenants.

- Select the 'Send Offer' button on the opportunity screen.

The screenshot shows the Grainger PLC Salesforce application. At the top, there's a navigation bar with links like Home, Leads, Tenancy Review, Accounts, Contacts, Tenancies, Opportunities, Blocks, Buildings, Units, Tasks, Notes, and More. Below the navigation bar, the main content area is titled 'Opportunity Tenancy Review - 01/12/2025 - 2, Brooke Court, Newlands Ave, Waterlooville'. It displays details such as 'Tenancy Review Date: 01/12/2025', 'Unit: 2, Brooke Court, Newlands Ave, Waterlooville', 'Rent: £1,875.00', and 'Passing/Current Rent: 1,750.00'. A prominent orange arrow points to the 'Send Offer' button in the top right corner of the main content area.

- Check the details. All tenants are listed and will receive notification of the tenancy review.
- Optional: Enter a message that will display to the tenants on the offer.

The screenshot shows the 'Send Offer' modal window. It lists tenants with their roles: Person One (Tenant), Person Three (Tenant), and Person Four (Lead Tenant). It also shows offer details: Agreement Type (AST), Contract Start Date (1 Dec 2025), Rent (£1,875.00), and Passing/Current Rent (1,750). A message box contains the text 'Please note the following...'. An attachment section shows a PDF file named 'Comparable Rent.pdf'. At the bottom, there are 'Send' and 'Cancel' buttons.

Contact Full Name	Role
Person One	Tenant
Person Three	Tenant
Person Four	Lead Tenant

Message Displayed on Offer:

Please note the following...

Add Attachments:

Or drop files

Comparable Rent.pdf

Send Cancel

- Optional: Drop / upload files that will be attached to the email sent to the tenants.
 - Note that **multiples files** may be uploaded, however they all need to be selected at the same time.
- Select 'Send'.
- Once sent, the files and the message (if any) will be saved on the offer.

Opportunity
Tenancy Review - 24/11/2025 - 2, Brooke Court, Newlands Ave, Waterloo

Tenancy Review Date: 01/12/2025
Unit: 2, Brooke Court, Newlands Ave, Waterloo

On sending an offer: The opportunity stage updates to 'Rent Review Sent'.

Offer Status: Presented
Offer Name: 2, Brooke Court, Newlands Ave, Waterloo - 04/09/2025
Offer Date: 04/09/2025, 13:46
Offer Value: £1,875.00

On sending an offer: The offer status updates to 'Presented' and the offer name updates to reflect the date sent.

8.1 Reminder SMS & Emails

An **SMS** (text message) reminding tenants to respond to the offer is sent the following afternoon, provided that none of the tenants have yet responded (i.e. the opportunity remains in the *Rent Review Sent* stage).

- An SMS is only sent where the tenant is person (not a company) with a valid UK mobile phone number, regardless of the *Suppress Automated Renewal Chase Emails* flag.

Chaser emails reminding tenants to respond to the offer will be sent after 3, 7 & 10 days until a response is received from any of the tenants (and the opportunity moves out of the 'Rent Review Sent' stage).

- Only fixed term offers that are sent via the above process are sent chaser emails.
- Chaser emails are not sent for parking or shed licences, regardless of whether they are fixed term or periodic.
- Chaser emails are not sent where the opportunity is flagged to *Suppress Automated Renewal Chase Emails*.

Opportunity
Tenancy Review - 01/12/2025 - 2, Brooke Court, Newlands Ave, Waterloo

Details Related Files

Opportunity Details

Opportunity Name	Tenancy Review - 01/12/2025 - 2, Brooke Court, Newlands Ave, Waterloo
Account Name	Person Four
Stage	Rent Review Sent
Sub Stage	Not Viewed
Tenancy Type	Renewal
Agreement Type	AST
Tenure	Affordable Rent
Pets	

Current Tenancy Information

Tenancy	00086068
Passing/Current Rent	1,750.00
Start Date	01/07/2025
Tenancy End Date	31/08/2025
Tenancy Length (Months)	3
Contract Term	24

Activity Chatter

Record of whether the SMS (text message) was successfully sent or not.

Offer emails, chaser emails & any tenant replies to these emails can be viewed in the opportunity's activity timeline.

Upcoming

September - 2025

- > SMS Sophie Farr had a task with Person One Today
- > SMS Sophie Farr had a task with Person Three Today
- > SMS Failed Sophie Farr had a task with Person Four Today
 - Customer Name: Person Four
 - Description: Tenant does not have a valid UK mobile number available. No SMS sent.

Important Update – Tenancy Review – ... 13:46 | Yesterday

9. Offer Responses

When a tenant views or responds to an offer online, a record of each the **offer response** can be seen on the offer.

- Each tenant is able to respond separately to an offer; each individuals response can be seen. Where multiple offers are sent over time, tenants can respond again to each new offer.

The tenancy review negotiator will be able to monitor responses in the [Reviews in Progress](#) list:

- Where the tenant views the offer online but does not respond, the opportunity sub stage updates to '**Viewed**'.
- Where the tenant responds online, the opportunity stage will update to '**Rent Review Agreed**' or '**Informal Challenge**' as applicable.

Offer stage updates when tenant responds

Offer Responses (2)

	Response Number	Contact Name	Last Viewed Date	Response Type	Counteroffer	Counteroffer Motivation	Query/Request Detail	Follow-Up Date
1	00000062	Person Four	04/09/2025	Counteroffer;Other Request	£1,800.00	There are similar flats for less across the road.	Are there any parking bays available?	
2	00000063	Person One	03/09/2025					

Click to see / add details.

Date the tenant last viewed the offer online, even if they did not respond.

A record of any conversations with the tenant can be saved on the offer response, if required:

Offer Response
00000062

Offer
[2, Brooke Court, Newlands Ave, Waterlooville - 04/09/2025](#)

Contact Name
Person Four

Date Response Received
04/09/2025

Details Related

Offer Response Details

Offer	2, Brooke Court, Newlands Ave, Waterlooville - 04/09/2025	Last Requested OTP Date	04/09/2025
Contact Name	Person Four	Last Viewed Date	04/09/2025
Response Channel	Email	Date Response Received	04/09/2025

Response

Response Type	Counteroffer;Other Request	Counteroffer	£1,800.00
Query/Request Detail	Are there any parking bays available?	Counteroffer Motivation	There are similar flats for less across the road.

Follow-Up

Follow-Up Comments

System Information

Created By
Helen Douglas-Teggart, 04/09/2025, 13:49

Last Modified By
Open box, 05/09/2025, 16:09

Click on the response number to open the offer response details.

Enter follow-up comments and date.

A full history of each time the tenant **viewed the offer details online** can be found on the offer response's 'Related' tab.

If a tenant responds via another channel, for example if the negotiator has a phone call with the tenant, the **response can be manually captured**:

- Select the 'New' button:

The screenshot shows a Salesforce interface for managing offer responses. At the top, it displays the offer details: "Offer 2, Brooke Court, Newlands Ave, Waterlooville - 04/09/2025". Below this is a navigation bar with buttons for "Tenant Response", "Counteroffer", "Accepted", and "Voided". To the right of the navigation are buttons for "Estate Performance", "Edit", and "Respond to Counteroffer". The main area is titled "Offer Responses (2)" and shows a table with two rows of data. The columns include "Response Number", "Contact Name", "Last Viewed Date", "Response Type", "Counteroffer", "Counteroffer Motivation", "Query/Request Detail", and "Follow-Up Date". The second row, for Person One, has a "New" button highlighted with an orange arrow. A "View All" link is at the bottom of the table.

- Select the tenant (contact name) and capture the response details.
 - Note that additional response options that are not available to the tenants online (i.e. *Requested to Terminate* and *Change of Sharer*) can be captured where necessary.

The screenshot shows a detailed view of the "New Offer Response: Residential Tenancy Renewal" form. It is divided into several sections: "Offer Response Details", "Response", and "Follow-Up". In the "Offer Response Details" section, fields include "Offer" (set to "Ave, Waterlooville - 04/09/2025"), "Contact Name" (with a search bar), "Response Channel" (set to "Email"), and "Date Response Received" (with a calendar icon). In the "Response" section, there are two main panels: "Available" (containing "Accepted", "Requested to Terminate", "Change of Sharer", "Counteroffer", and "Other Request") and "Chosen" (containing "Counteroffer" and "Counteroffer Motivation"). Below these panels is a "Query/Request Detail" field. At the bottom of the form are "Cancel", "Save & New", and "Save" buttons. A note at the bottom left says "LATEST FOLLOW-UP DATE". The "Save & New" button is highlighted with an orange arrow.

Remember to incorporate information provided in the tenant responses when capturing the renewal feedback.

10. Responding to Counteroffers & Asset Manager Approval

Where a tenant has made a counteroffer, the negotiator will enter their suggested price.

- On the offer screen, select 'Respond to Counteroffer'.

The screenshot shows the Grainger PLC Salesforce application. At the top, there's a navigation bar with various links like Home, Leads, Accounts, Tenancy Review, Contacts, Tenancies, Opportunities, Units, Tasks, Reports, Dashboards, Calendar, and more. Below the navigation is a specific offer record for 'Offer 2, Brooke Court, Newlands Ave, Waterlooville - 04/09/2025'. The main content area has tabs for Tenant Response, Counteroffer, Accepted, and Voided. A button 'Mark Status as Complete' is visible. On the left, there's a sidebar for 'Offer Responses (2)' with two items listed. The main body has sections for Details (Offer Details, Offer Information, Counteroffer), Tenancy Review Pricing, and a large central area labeled 'Counteroffer section now displays.' containing detailed financial data. A red arrow points to the 'Respond to Counteroffer' button in the top right corner of the main content area.

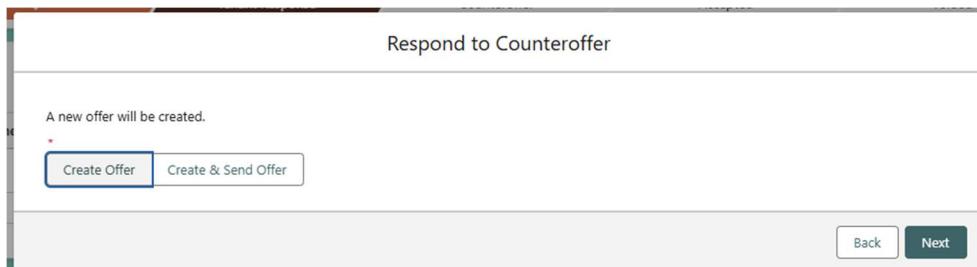
- Enter the suggested price (if different to the counteroffer) and enter reasoning.

The screenshot shows a modal dialog titled 'Respond to Counteroffer'. It contains fields for 'Counteroffer' (set to £1,800.00) and 'Suggested Price' (set to £1,850). There's also a required field 'Suggested Price Reasoning' with the text 'Is inline with other recent rent increases.' A 'Next' button is at the bottom right.

10.1 Suggested Price Above AM Minimum

If the suggested price is **not below the AM Minimum Rent Review Price**:

- A new offer is automatically created with the suggested price set as the rent.
- The negotiator can send the new offer to the tenants immediately by selecting '**Create & Send Offer**' & 'Next'.
 - This will open the same screen as per [Send an Offer](#), where the user can enter a message and upload attachments to the offer email if required.
- Otherwise, select '**Create Offer**' & 'Next'.
 - The new offer that is created can be sent at a later time; see [Send an Offer](#).

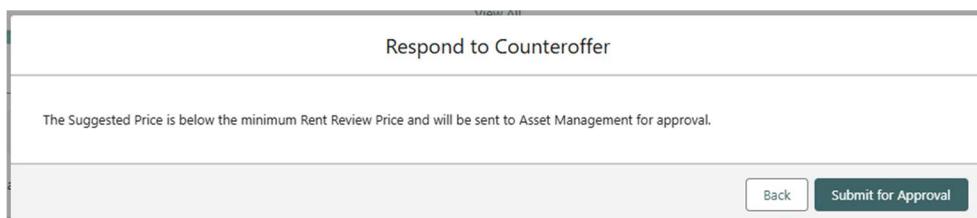


The new offer created is now the primary offer & has the same offer information (such as term and payment periodicity) as the previous offer.

Offer Number	Offer Name	Primary ...	Status	Date Offer Sent	Latest Respons...	Latest Follow...	Rent	Counteroffer
1	2, Brooke Court, Newlands Ave, Waterloo - 04/0...	<input type="checkbox"/>	Counteroffer	04/09/2025, 13:46	04/09/2025		£1,875.00	£1,800.00
2	2, Brooke Court, Newlands Ave, Waterloo - Revised Offer 05/09/2025	<input checked="" type="checkbox"/>	Draft				£1,850.00	

10.2 Suggested Price Below AM Minimum

If the suggested price is **below the AM Minimum Rent Review Price**, the user will be asked to confirm that the suggested price will be sent to the Asset Manager for approval.



- An approval request is sent to the Asset Manager, and can be viewed on the offer's *Related* tab:

Status Counteroffer Rent £1,875.00 Opportunity Name Tenancy Review - 01/12/2025 - 2, Brooke Court, Newlands Ave, Waterlooville

Status updates

Offer Responses (2)
2 items • Updated 2 minutes ago

	Response Number	Contact Name	Last Viewed Date	Response Type	Counteroffer	Counteroffer Motivation	Query/Request Detail	Follow-Up Date
1	00000062	Person Four	04/09/2025	Counteroffer/Other Request	£1,800.00	There are similar flats for less ac...	Are there any parking ba...	
2	00000063	Person One	03/09/2025					

Details **Related**

History of the approval request sent to the Asset Manager.

Approval History (2)

Step Name	Date	Status	Assigned To
Rent Review Negotiation Owner Ap...	08/09/2025, 08:25	Pending	Vicki Turnbull
Approval Request Submitted	08/09/2025, 08:25	Submitted	Helen Douglas-Teggart

Tenancy Review Pricing

- Passing/Current Rent £1,750.00
- AM Rent Review Price £1,875.00
- AM Rent Review / Current Rent 7.1%
- AM Rent Review / Latest ERV 2.7%
- AM Minimum Rent Review Price £1,850.00
- AM Minimum Price / Current Rent 5.7%
- AM Minimum Price / Latest ERV 1.4%

Click to open the approval request.

10.3 Asset Manager Approval

Asset Managers will be able to see offers pending their approval on their home page and as a notification.

Notifications

Helen Douglas-Teggart is requesting approval for offer Offer Name: 2, Brooke Court, Newlands Ave, Waterlooville - 04/09/2025 • Suggested Price Reasoning: In line with recent new lets. • Rent: £1,875.00 • Growth to Counteroffer: 2.9%
12 minutes ago

Today's Events
Looks like you're free and clear the rest of the day.
[View Calendar](#)

Today's Tasks
Nothing due today. Be a go-getter, and check back soon.
[View All](#)

Approval requests

Items to Approve

2, Brooke Court, Newlands Ave, Waterlooville - 04/09/2025 Offer • Submitted by Helen Douglas-Teggart
Friday Feeling Ltd Opportunity • Submitted by Lesley Richardson
Jacob's Bakery Opportunity • Submitted by Open box
Nadias Coffee Shop Opportunity • Submitted by Open box
Blackfords Buzz Cutz Opportunity • Submitted by Open box
Jacob's Bakery Opportunity • Submitted by Jacqui Dobson

[View All](#)

Open the approval request to see a summary of details, including:

- **Rent** – Rent offered to the tenant.
- **AM Minimum Rent Review Price** – as originally set by the Asset Manager.
- **Counteroffer** – by the tenant. Growth from current rent to the counteroffer as well as counteroffer price relative to the latest ERV is displayed.
- **Suggested Price** – by the Tenancy Review Negotiator, if they do not agree with the counteroffer. Growth from current rent to the suggested price as well as suggested price relative to the latest ERV is displayed.
- **Suggested Price Reasoning** – Negotiator's motivation for the suggested price (or to go with the counteroffer if there is no suggested price).

The screenshot shows a Salesforce page for an 'Approval Request Offer Approval' in a 'Pending' status. At the top, there are navigation links for Home, Tenancy Review, Leads, Accounts, Contacts, Opportunities, Tenancies, Blocks, Buildings, Units, and More. A search bar and various icons are also present. The main content area shows the following details:

Submitter	Date Submitted	Actual Approver	Assigned To
Helen Douglas-Teggart	8 Sept 2025	Vicki Turnbull	Vicki Turnbull

Details

Offer Name: 2, Brooke Court, Newlands Ave, Waterlooville - 04/09/2025

Rent: £1,875.00

AM Minimum Rent Review Price: £1,850.00

Counteroffer: £1,800.00

Suggested Price: £1,825.00

AM Approved Price: -100.0%

Suggested Price Reasoning: In line with recent new lets.

Growth to Counteroffer: 2.9%

Counteroffer / Latest ERV: -1.4%

Growth to Suggested Price: 4.3%

Suggested Price / Latest ERV: 0.0%

Growth to AM Approved Price: -100.0%

Owner Name: Grainger Automated Process

A callout box highlights the 'Reassign' button in the top right corner of the header. Another callout box on the right side states: 'The approval request can be reassigned to another AM if required.'

The Asset Manager has 3 options:

- **Reject** – The tenant will not be offered any further rent reductions.
 - Select the 'Reject' button on the approval request screen (above).
 - The AM will be prompted to enter a comment, which is required when rejecting.
 - The opportunity sub stage is updated to 'AM Rejected', which the tenancy review negotiator will be able to monitor in the [Reviews in Progress](#) list.
- **Approve the suggested price** (or the counteroffer if there is no suggested price)
 - Select the 'Approve' button on the approval request screen.
 - The AM will be prompted to enter a comment, which is optional when approving.
- **Approve an alternate price**
 - Open the offer details by clicking on the offer name.
 - On the offer screen (below), enter an alternate amount as the 'AM Approved Price'.
 - Then 'Approve' the approval request.

The screenshot shows the Salesforce Tenancy Review interface. In the center, there's a table for 'Offer Responses'. A callout box points to the 'Counteroffer Motivation' column, which contains a note about similar flats being available across the road. Another callout box points to the 'AM Approved Price' field, which is highlighted with a red border. A third callout box points to a detailed breakdown of growth percentages for the AM Approved Price.

	Response Num...	Contact Name	Last Viewed Date	Response Type	Counteroffer	Counteroffer Motivation	Query/Request Detail	Follow-Up Date
1	00000062	Person Four	04/09/2025	Counteroffer;Other Request	£1,800.00	There are similar flats for less across the road.	Are there any parking bays available?	

Details **Related**

Offer Details

Offer Information

Rent: £1,875.00
Term: 12 Months
Payment Periodicity: Monthly
Special Clause: Gas, Clause Free

Counteroffer

Optional: AM may enter an alternate price.

Counteroffer: £1,800.00
Suggested Price: £1,825.00
Suggested Price Reasoning: In line with recent new lets.
AM Approved Price: £1,830.00

Growth to Counteroffer: 2.9%
Counteroffer / Latest ERV: -1.4%
Growth to Suggested Price: 4.3%
Suggested Price / Latest ERV: 0.0%
Growth to AM Approved Price: 4.6%
AM Approved Price / Latest ERV: 0.3%

Tenancy Review Pricing

Passing/Current Rent: £1,750.00
AM Rent Review Price: £1,875.00
AM Rent Review / Current Rent: 7.19%
AM Rent Review / Latest ERV: 2.79%
AM Minimum Rent Review Price: £1,850.00
AM Minimum Price / Current Rent: 5.79%
AM Minimum Price / Latest ERV: 1.49%
AM Comment: Far below ERV
Price Book Rent: £1,758.00
Price Book / Current Rent: 0.56%
Latest ERV Price Book: Price Book Rent Mar 2025
Latest ERV: £1,825.00
Current Rent / Latest ERV: 1.49%

Pricing information as seen by the Asset Manager when originally approving the rent review price.

- Navigate back to the approval request from the **Approval History** on the offer's 'Related' tab in order to approve; or simply click on the 'Approve' button here:

The screenshot shows the Approval History section of the Salesforce Tenancy Review interface. It lists two steps: 'Rent Review Negotiation Owner...' and 'Approval Request Submitted'. A callout box points to the 'Approval History' tab, and another points to the 'Approve' button, which is highlighted with a red border.

Step Name	Date	Status	Assigned To
Rent Review Negotiation Owner...	08/09/2025, 08:25	Pending	Vicki Turnbull
Approval Request Submitted	08/09/2025, 08:25	Submitted	Helen Douglas-Teggart

Offer Line Item (1)

Approval History (2)

Tenancy Review Pricing

Passing/Current Rent: £1,750.00
AM Rent Review Price: £1,875.00
AM Rent Review / Current Rent: 7.19%
AM Rent Review / Latest ERV: 2.79%
AM Minimum Rent Review Price: £1,850.00
AM Minimum Price / Current Rent: 5.79%
AM Minimum Price / Latest ERV: 1.49%
AM Comment: Far below ERV

When the Asset Manager **approves** either the suggested price or an alternate price:

- A new (primary) offer is created with the approved price set as the rent.
- The opportunity sub stage is updated to 'AM Approved', which the tenancy review negotiator will be able to monitor in the **Reviews in Progress** list.
- The negotiator can send the new offer to the tenant; see [Send an Offer](#).

11. Renewal Feedback

Capture any positive or negative feedback from the tenants:

Opportunity
Tenancy Review - 01/12/2025 - 2, Brooke Court, Newlands Ave, Waterlooville

Defer Tenancy Review

Details Related Files

Right to Rents

	Right to Re...	RTR Validity	Tenant	Status	Time Limited	RTR Expiry	Date Next R...
1	<input type="checkbox"/> RTR-00022520	🚩	Person Three	Completed	✓	17 Sept 2025	17 Sept 2025
2	<input type="checkbox"/> RTR-00022518	🚩	Person One	RTR Not Required			
3	<input type="checkbox"/> RTR-00022619	🚩	Person Four	Completed	✓	14 Aug 2025	30 Jun 2026

Contracts (1)

1 item • Updated a few seconds ago

	Record Nu...	Record Type	Tenancy Type	Agreement Type	Unit	Record S...
1	<input type="checkbox"/> 00086318	Residential Contract	Renewal	Assured	2, Brooke Court, Newlands Ave, Waterlooville	Draft

Feedback (1)

1 item • Updated a few seconds ago

	Feedback ID	Record Type	Last Modified Date
1	<input type="checkbox"/> FB-007309	Renewal Feedback	08/09/2025, 14:21

From opportunity's related list:
Select 'New'
feedback and then
select 'Renewal
Feedback'.

New Feedback: Renewal Feedback

* = Required Information

Details

Feedback ID: Related Opportunity: Tenancy Review - 01/12/2025 - X Record Type: Renewal Feedback Owner:

Renewal Status:

Feedback

Positive Feedback

Available	Chosen
Rent – Fair	
Site- Community	
Site- Staff	
Site- Response Time	

Lost Reason - Term

Available	Chosen
Break Clause	
Shorter Contract - L...	
Shorter Contract - L...	
Fail References	

Lost Reason - Price

Available	Chosen
Reduce - Best Price	
Reduce - Midway	
No Neg	

Lost Reason - Unit, Site, and Service

Available	Chosen
Unit - Maintenance	
Unit - Size Of Unit	
Site - Litter & Dog ...	

Cost Of Living

Cancel Save & New Save

Capture the renewal outcome.

Capture all positive feedback or all reasons for not continuing the tenancy, as applicable.

12. Sending Documents

Once the tenant has agreed to the rent increase (or if not required to agree – has not made an informal challenge), then the contact & document can be generated:

- Select ‘Create Contract’.

The screenshot shows the Grainger PLC Salesforce application. The top navigation bar includes links for Home, Leads, Tenancy Review, Accounts, Contacts, Tenancies, Opportunities, Blocks, Buildings, Units, Tasks, Notes, Reports, and More. The current page is 'Tenancy Review - 01/12/2025 - 2, Brooke Court, Newlands Ave, Waterlooville'. Below the header, there's a summary table with fields: Tenancy Review Date (01/12/2025), Unit (2, Brooke Court, Newlands Ave, Waterlooville), Rent (£1,830.00), and Passing/Current Rent (£1,750.00). To the right of the summary table is a row of buttons: Defer Tenancy Review, Create Contract (which has a red arrow pointing to it), Estate Performance, Create Offer, and Edit. Below the summary table is a breadcrumb navigation: Tenancy Review → Rent Review Ag... → COS → Documents Sent → Formal Challenge → Audit → Closed. There's also a 'Mark Stage as Complete' button. Underneath the breadcrumb is a section titled 'Offers (2)' with a table showing two offers. The first offer is '2, Brooke Court, Newlands Ave, Waterlooville - 04/09/2025' with status 'Counteroffer' and date '04/09/2025, 13:46'. The second offer is '2, Brooke Court, Newlands Ave, Waterlooville - Revised Offer 08/09/2025' with status 'Accepted' and date '07/09/2025, 12:00'. At the bottom of the offers section is a 'View All' link.

- Select the applicable document type:

The 'Create Contract' dialog box is open. At the top, it says 'Create Contract'. Below that is a 'Special Clause' input field with a placeholder text: 'Please select the Special Clause so that it is highlighted in blue.' To the right of the input field is a dropdown menu labeled 'Break Clause' with the option '2 at 4 to expire at 6'. On the right side of the dialog, there's a 'Document Type' section. It has two panes: 'Available' on the left and 'Chosen' on the right. The 'Available' pane contains 'AST' and 'Section 13'. The 'Chosen' pane contains 'Section 13 for Post'. At the bottom right of the dialog is a 'Next' button.

- Open the newly created contract from the opportunity's *Related* tab:

Opportunity
Tenancy Review - 01/12/2025 - 2, Brooke Court, Newlands Ave, Waterlooville

Defer Tenancy Review

Details Related Files

Right to Rents

	Right to Ren...	RTR Validity	Tenant	Status	Time Limited	RTR Expiry	Date Next R...
1	<input type="checkbox"/> RTR-00022520	Person Three	Completed	✓	17 Sept 2025	17 Sept 2025	
2	<input type="checkbox"/> RTR-00022518	Person One	RTR Not Required				
3	<input type="checkbox"/> RTR-00022619	Person Four	Completed	✓	14 Aug 2025	30 Jun 2026	

Contracts (1)

1 item • Updated a few seconds ago

	Record Nu...	Record Type	Tenancy Type	Agreement Type	Unit	Re...
1	<input type="checkbox"/> 00086318	Residential Contract	Renewal	Assured	2, Brooke Court, Newlands Ave, Waterlooville	Dra...

[View All](#)

- Select 'Generate Documents':

Grainger PLC Home Leads Accounts Tenancy Review Contacts Tenancies Opportunities Units Tasks Reports Dashboards More

Tenancy 00086318 + Follow Change Record Type Generate Documents Declaration

Record Type Residential Contract Agreement Type Assured Opportunity Tenancy Review - 01/12/2025 - 2, Brooke Court, Newlands Ave, W... Unit 2, Brooke Court, Newlands Ave, Waterlooville Start Date 01/12/2025 End Date 30/11/2026

Details Related

Details

Tenancy Owner	Open box	Tenancy Type	Renewal
Account Name	Person Four	Agreement Type	Assured
Record Status	Draft	Document Type	Section 13 for Post
Contract Term (months)	12	Memorandum of Agreement Date	
Start Date	01/12/2025	Tenancy	00086068
End Date	30/11/2026	Opportunity	Tenancy Review - 01/12/2025 - 2, Brooke Court, Newlands Ave, Waterlooville
Actual Move Out Date			

Additional Information

Unit	2, Brooke Court, Newlands Ave, Waterlooville	Rent	1,830.00
Uplift %	4.00%	Payment Periodicity	Monthly
Break Clause	2 at 4 to expire at 6	Security Deposit Amount	£593.03
Tenant Break	In order to end the tenancy early you may serve on us written notice at any time after four months from the beginning of the tenancy as set out in Clause B5 of this agreement. The tenancy will come to an end on the date referred to in your notice, which must be at least two months from the date of service of the notice. For the avoidance of doubt the earliest date you can end your tenancy is six calendar months from the start date ...		
		Live Work Clause	You agree that we may end the tenancy by giving you written notice. The law requires us to give you two months' notice under Section 21 of the Housing Act 1988 if we wish to end the tenancy. In order to end the tenancy early we may serve on you a Section 21 notice at any time after four months from the beginning of the tenancy as set out in Clause B5 of

12.1 Section 13 for Post

Section 13 for Post documents for **Assured** agreement types are generated through Salesforce. The document includes a cover letter and the Form 4.

Note that the following information on the form is sourced from the **tenancy**; this information should be checked and updated, if necessary, before generating the document:

- First rent increase date after 11th February 2003
- Current rent
- Current payment periodicity

Field	Value
Unit	2, Brooke Court, Newlands Ave, Waterlooville
Uplift %	4.00%
Previous Rent	£1,650.00
Break Clause	No Break
Special Clauses	Gas, Electricity inc. in Rent Clause
Description	First Rent Increase Since 2003 - 01/01/2005

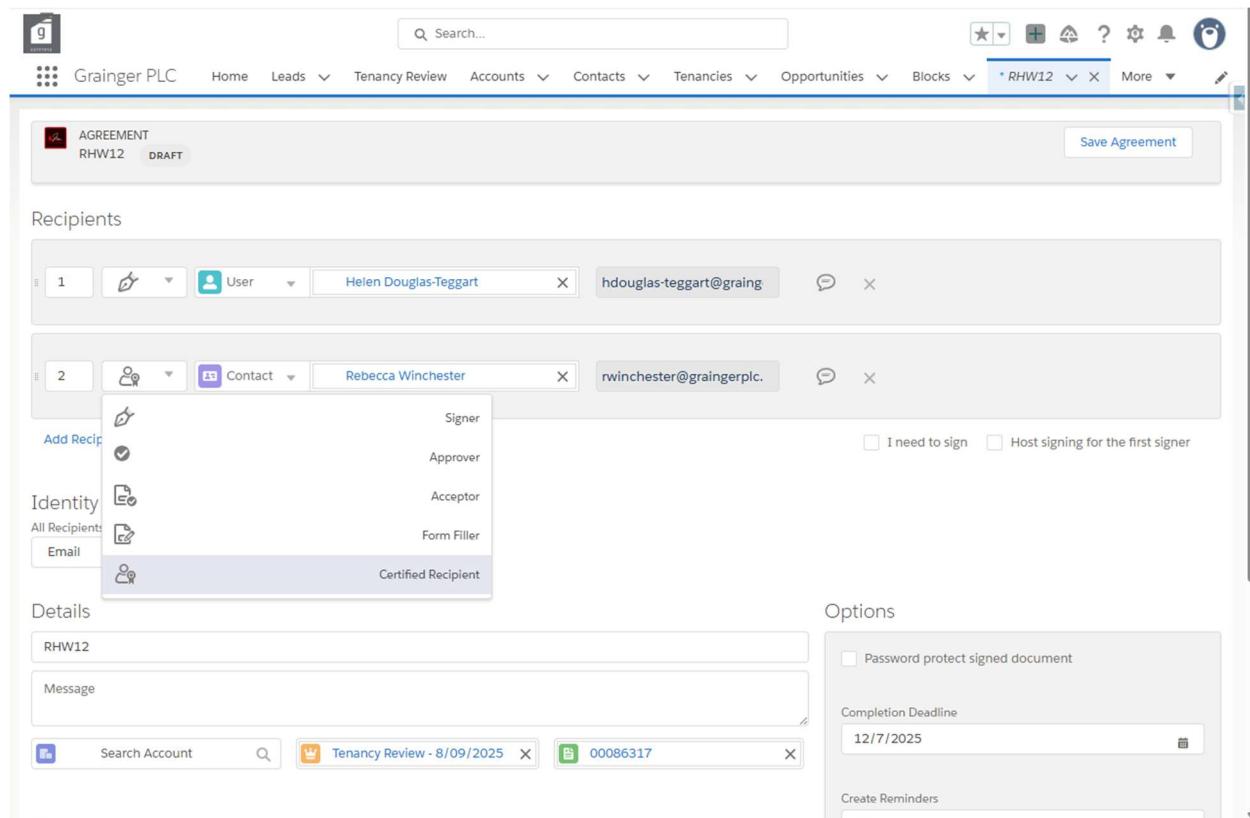
Once generated, the document can be opened, printed and posted:

12.2 RHW12

RHW12 (Notice of Variation of Rent) forms for Welsh occupation contracts are generated through Salesforce.

This document does not need to be signed by tenants.

- The user will be assigned as the sole **signer**, to sign on behalf of the landlord via Adobe Sign.
- The tenant(s) and any guarantor will be assigned as **certified recipients**.
 - Once the document is signed, they will receive an email via Adobe Sign from which they can access the signed document.



13. Defer Tenancy Review

A tenancy review can be deferred to a later date in several ways -

Before the tenancy review opportunity is created:

- Capture the *Deferred Rent Review Date* and *Reason Rent Review Deferred* on the tenancy:

Field	Value
Record Status	Current
Agreement Type	AST
Document Type	
Memorandum of Agreement Date	
Tenure	Discounted Market Rent- Non Social Housing
Arrears	£500.00
Reason Rent Review Deferred	Arrears;Disrepair Issue
GPLC Notice Initiated	
Grounds for Notice	

After the tenancy review opportunity has already been created:

- Asset Managers can defer one or more tenancy reviews from the [Rent Approval](#) screen.
- Tenancy Review Negotiators can defer an individual tenancy review opportunity.
 - When viewing the opportunity: Select the '[Defer Tenancy Review](#)' button.

- Enter the *Deferred Rent Review Date*, reason(s) and ‘Submit’:

The screenshot shows a 'Defer Tenancy Review' form. At the top, it says 'Defer Tenancy Review'. Below that is a field labeled '* Deferred Rent Review Date' containing '1 Jan 2026'. Underneath is a field labeled '* Reason Rent Review Deferred' with a list of options: 'Arrears', 'Churn Management', 'Disrepair Issue', 'For Sale' (which is highlighted in grey), and 'Major Works'. At the bottom right is a green 'Submit' button.

- No further updates are required. The tenancy is automatically updated with the *Deferred Rent Review Date* & reason. The opportunity is automatically pushed out to the new date; all previous pricing is deleted.

14. Block Pricing Notes

Pricing notes may be captured for an entire block.

This can be used to capture information that applies to all units in the block and that may affect pricing or require tenancy reviews to be deferred. Try to add dates for time-limited factors.

Pricing notes will be displayed to asset managers in the [Rent Approval](#) screen and to negotiators in the [tenancy review opportunity details](#) for any tenancy review in that block.

The screenshot shows the Grainger PLC Salesforce interface. The top navigation bar includes 'Grainger PLC', 'Home', 'Leads', 'Tenancy Review', 'Accounts', 'Contacts', 'Tenancies', 'Opportunities', 'Blocks' (which is the active tab), 'Buildings', 'Units', 'Tasks', 'Notes', 'More', and a search bar. Below the navigation is a block record for 'Abbeville - Apartments'. The 'Block Details' section contains fields: 'Block' (Abbeville - Apartments), 'Number of Buildings' (2), 'Amenities' (Communal Garden/Co-working Space), and a 'Pricing Notes' field (Scaffolding until 1/25). The 'Activity' section shows no upcoming or overdue activities.

15. Reports

15.1 Tenancy Review Dashboard

The **Reports** screen provides the following exception reports:

- **Tenancy Review Due in 3 Months & No Opportunity in Progress**
 - Most current tenancies that are due for rent review within the next 3-months should have a renewal or tenancy review opportunity in progress. Those that do not will appear in this report.
 - Ensure that all the exceptions in this list are valid, for example where the tenant has confirmed they will be moving out.
- **Tenancy Review Overdue or No Review Date & No Opportunity in Progress**
 - This report lists any current tenancies that:
 - Have **no tenancy review date** (i.e. no *Tenancy End Date*, *Next Rent Review Date*, or *Deferred Rent Review Date* is saved on the tenancy), or
 - Have a **tenancy review date in the past** and there is no renewal or tenancy review opportunity in progress.
 - **There should be no exceptions listed in this report.**

Record Number	Account Name	Unit	Agreement Type	Start Date	Tenancy End Date	Next Rent Review Date	Deferred Rent Review Date	GPLC Notice Initiated
00069368	Aaron Landess	11 Fraser Road, Wellesley, Aldershot, GU11 4B	Affordable	08/10/2020	07/10/2026	08/10/2025	-	<input type="checkbox"/>
00069493	Abdullah Aryubi	11 Bruneval Drive, Wellesley, Aldershot, Hant	Affordable	19/09/2019	18/09/2025	19/09/2025	-	<input type="checkbox"/>
00085721	Abigail Houghton	18 Pakenham Road, Waterlooville, PO7 3BY	Affordable	11/09/2023	10/09/2023	11/09/2025	-	<input type="checkbox"/>
00077236	Abigail Ryan	24 Albuhera Road, Wellesley, Aldershot GU11 4	Affordable	05/11/2020	04/11/2026	05/11/2025	-	<input type="checkbox"/>

Record Number	Account Name	Unit	Agreement Type	Start Date	Tenancy End Date	Next Rent Review Date	Deferred Rent Review Date	GPLC Notice Initiated
00078476	. Cantor	G7, Fernside Court, Holders Hill Road, Hendon	Licence	-	-	-	-	<input type="checkbox"/>
00063077	. Forster	SC - 4 Scarlets Road GU11 4AE	-	-	-	-	-	<input type="checkbox"/>
00080334	. Gonzalez	Shed 75, Dibdin Hse , Andover Place, W9 1QE	Licence	01/02/2020	31/01/2021	-	-	<input type="checkbox"/>
00070055	. Kinsella	Shed 56, Dibdin Hse , Andover Place, W9 1QE	Licence	01/02/2020	31/01/2021	-	-	<input type="checkbox"/>

Note that both of these reports exclude decants, occupation licences, and tenancies where the tenants have already moved out.

15.2 Formal Challenges

All tenancy review opportunities that are currently in a 'Formal Challenge' status can be viewed on the **Formal Challenges** screen.

The screenshot shows the Grainger PLC Salesforce application. At the top, there's a navigation bar with links like Home, Leads, Tenancy Review, Accounts, Contacts, Tenancies, Opportunities, Blocks, Buildings, Units, Tasks, Notes, and More. Below the navigation bar, a search bar says 'Search...'. On the left, there's a sidebar with icons for Rent Approval, Reviews In Progress, Estate Performance, Growth On Rent, Reports, and Formal Challenges. The 'Formal Challenges' icon is highlighted. The main content area has a title 'Tenancy Review Formal Challenges' and a subtitle 'Tenancy Review Formal Challenges'. It shows a table with three rows of data:

Opportunity Name ↑	Tenancy Review Date	Account Name	Tenancy	Unit	Agreement Type
Tenancy Review - 1/09/2025 - 1 Overlord House, Marrelsmoor Avenue, Waterloo	01/09/2025	Amy Farr	00076463	1 Overlord House, Marrelsmoor Avenue, Waterloo	Affordable
Tenancy Review - 14/10/2025 - 1601, 5 Capital Quarter, Tyndall St., Cardiff	14/10/2025	SVOT Manual 2025-06-02	00085973	1601, 5 Capital Quarter, Tyndall St., Cardiff	Occupation Contract
Tenancy Review - 17/10/2025 - FLAT 12, Hawkins Ln, Finzels Reach, Bristol	03/09/2025	Lori Grimes	00086020	FLAT 12, Hawkins Ln, Finzels Reach, Bristol,	AST

At the bottom of the page, there are two buttons: 'View Report (Tenancy Review Formal Challenges)' and 'As of 4 Sept 2025, 11:53 Viewing as Helen Douglas-Teggart'.

Note there is currently no system-based process to manage formal challenges.