

# User Guide:

## Salesforce End of Tenancy

### Version History

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

## Table of Contents

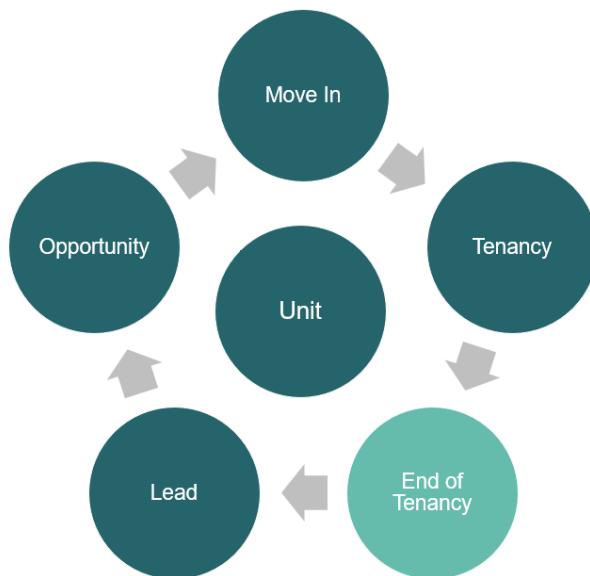
1.	Overview .....	3
2.	How to Create an EOT .....	7
3.	The EOT at a Glance .....	8
3.1	Key EOT Details.....	9
4.	End of Tenancy Tasks.....	10
4.1	Where Do I Find My Tasks?.....	10
4.2	The Task at a Glance.....	11
4.3	Task Statuses.....	12
4.4	Starting a Task .....	12
4.5	Completing a Task .....	13
(a)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

## 1. Overview

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

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

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



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

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

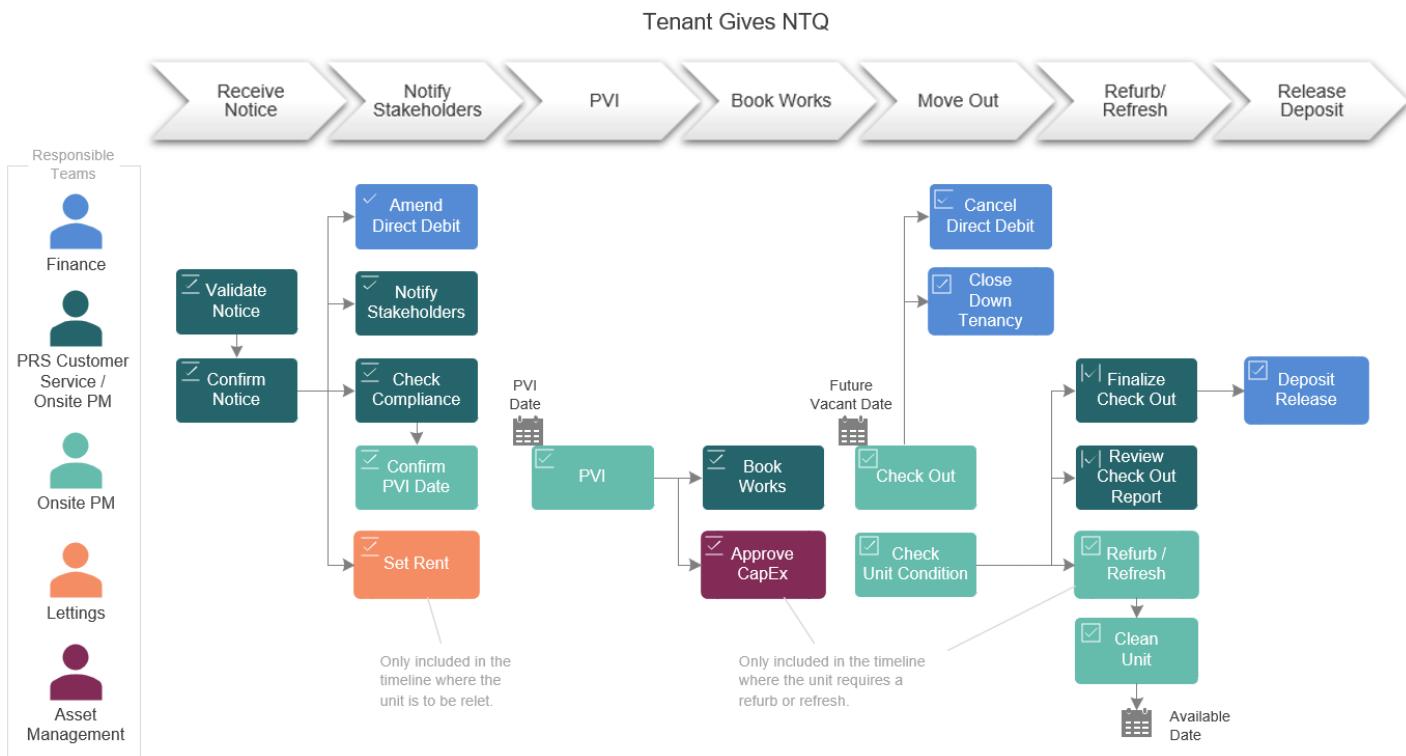
When initially created, an **estimated timeline** is calculated for the End of Tenancy, based on the information available at the time. Each task will have an estimated start date & target end date, and the resultant available date for the unit will be projected.

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

## End of Tenancy Phases & Tasks

The following illustrates the sequence of phases and tasks.

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



The estimated task dates are automatically updated when:

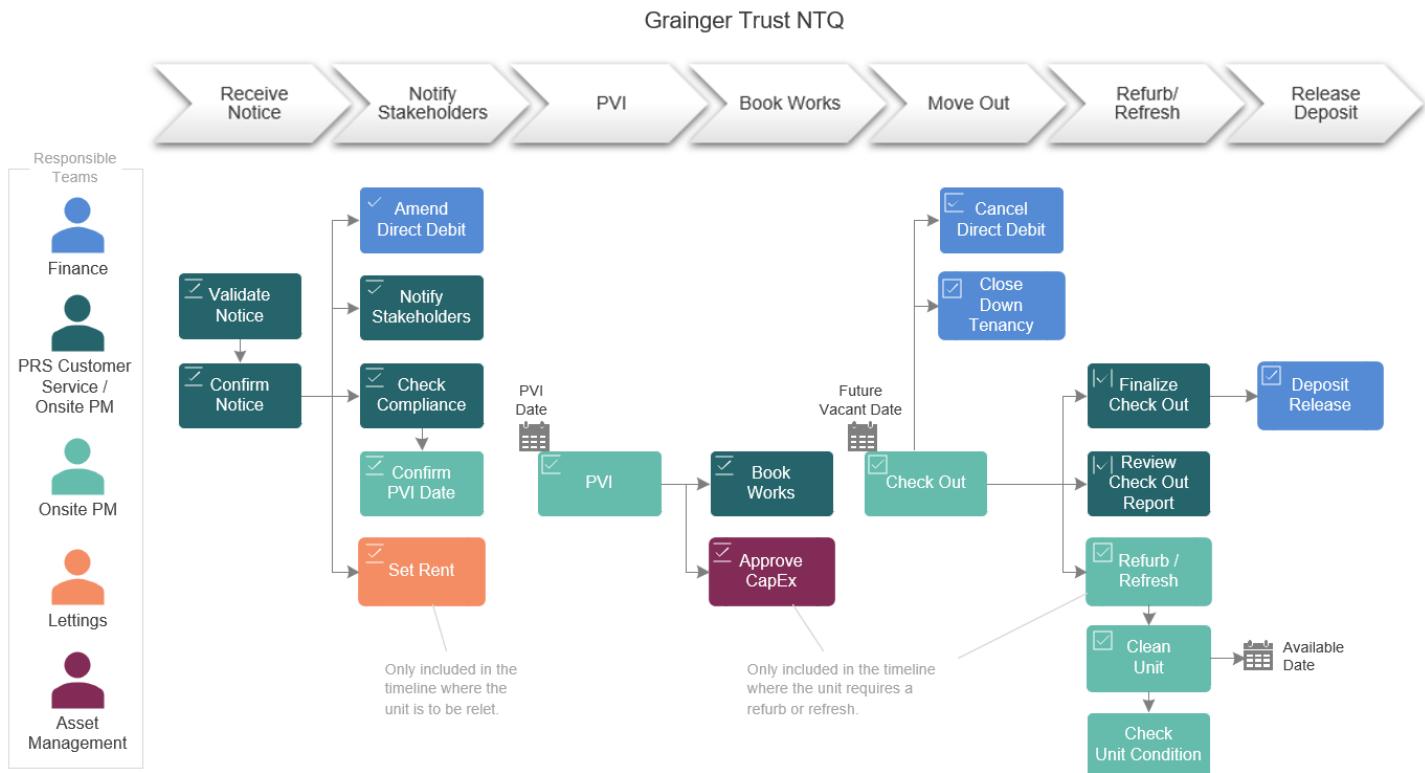
- The *PVI Date* and *Future Vacant Date* are updated and confirmed.
- Prerequisite tasks are completed.
- Any expected delays are captured.

Tasks will be added or removed from the timeline when:

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

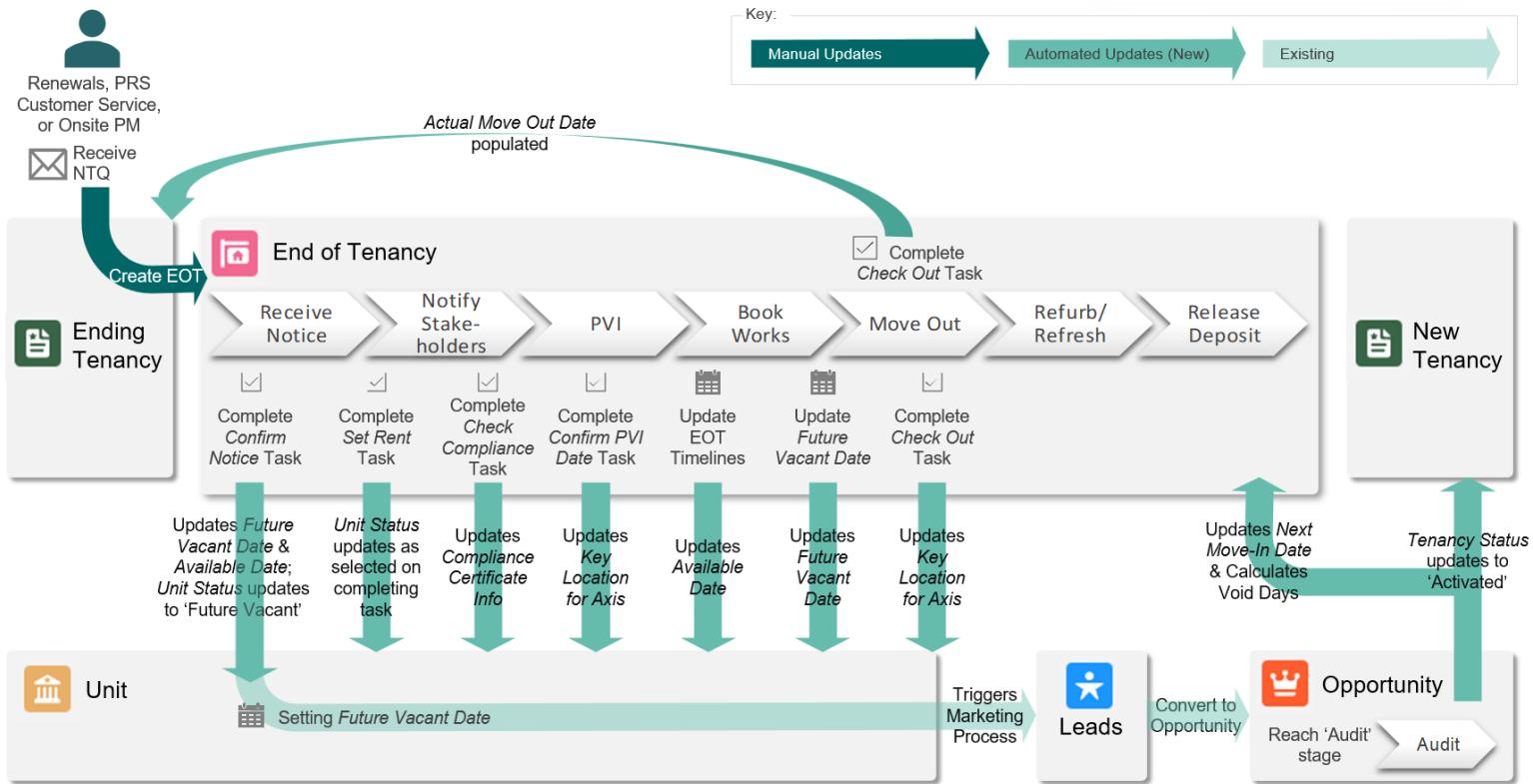
A slightly different sequence of tasks is available for **Grainger Trust** units.

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



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

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



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

## 2. How to Create an EOT

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

The screenshot shows the Salesforce interface for a 'Tenancy Person Account Test' record. At the top, there is a navigation bar with various tabs like Home, Tenancy Review, Leads, Accounts, Contacts, Opportunities, Tenancies, Blocks, Buildings, Units, Tasks, Notes, Reports, Dashboards, and More. A red arrow points to the 'Create End of Tenancy' button in the Tenancies tab menu.

**Related Tab:** This section shows existing End of Tenancies. A callout box states: "Any existing End of Tenancies can be seen on the *Related* tab."

**Form Fields:**

- \* Notice to Quit Date: 5 Jun 2025
- \* Future Vacant Date: 7 Jul 2025
- Future Vacant Date is Confirmed
- \* PVI Date: 9 Jun 2025
- Unit to be Relet
- \* EoT Template: Tenant Gives NTQ
- \* Owner: Louise Spooner
- Reason for Vacancy: --None--
- Notes: [Empty text area]

A callout box for the PVI Date field says: "The **PVI Date** will default to 4 weeks prior to *Future Vacant Date* but can be changed if required. The PVI Date can also be updated at a later time once the *Future Vacant Date* is confirmed."

A callout box for the Owner field says: "For Grainger Trust units: Select '**Grainger Trust NTQ**' as the EoT Template. This will create an End of Tenancy with tasks & timelines that have been customized for Grainger Trust units."

A callout box for the Reason for Vacancy field says: "The **Unit Manager** is responsible for the overall End of Tenancy."

**Create New End of Tenancy** button is located at the bottom right of the form.

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

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

## 3. The EOT at a Glance

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

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

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

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

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

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

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

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

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

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

Detailed description: The screenshot shows the Salesforce End of Tenancy (EOT) page for a unit. At the top, a banner states: 'End of Tenancy phases will automatically close once all the tasks within a phase are complete.' Below this, a timeline sidebar lists 'Outstanding Tasks' with their status and last updated time. The main content area shows the 'Details' tab of an EOT record for 'EOT - 406, 82 Upper Allen St, Sheffield'. It includes sections for 'Information' (with fields like End of Tenancy Name, Tenant ID, Status, and End of Tenancy Template) and 'Important Dates' (with fields like Start Date, PVI Date, PVI Time, PVI Date & Time is Confirmed, PVI Completed Date, Works Start Date, Works End Date, and Available Date). A callout highlights the 'Available Date' field. Another callout highlights the 'Completion Date' field, which is set to '16/05/2024'. A third callout highlights the 'Task Owner' section in the timeline sidebar. At the bottom, there's a 'Related' tab, a file upload section, and tables for 'End Of Tenancy Phase (6+)' and 'End Of Tenancy Tasks (6+)'. The 'End Of Tenancy Phase' table shows phases like 'Receive Notice', 'Notify Stakeholders', 'PVI', etc., with their task counts and statuses. The 'End Of Tenancy Tasks' table shows specific tasks like 'Validate Notice' and 'Confirm Notice' with their status, start date, and target end date.

## 3.1 Key EOT Details



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

The screenshot shows the Salesforce 'End of Tenancy' details page. It includes sections for 'Information', 'Important Dates', 'Additional Details', and 'Timeline'. Annotations highlight specific fields:

- PVI Date & Time is Confirmed**: A checkbox in the 'Important Dates' section. A callout notes that the PVI task only appears ready to be worked on when this is checked.
- Future Vacant Date is Confirmed**: A checkbox in the 'Timeline' section. A callout notes that updating the Future Vacant Date after this task is completed will re-open the task.
- Unit to be Relet**: A checkbox in the 'Timeline' section. A callout notes that the Set Rent task only appears when this is checked.
- End of Tenancy Works Type**: A dropdown in the 'Additional Details' section set to 'Clean Only'. A callout notes that Approve Capex & Refresh / Refurb tasks only appear when the Works Type is set to 'Refurb' or 'Refresh'.
- Unit to be Sold**: A checkbox in the 'Timeline' section. A callout notes that this determines whether Asset Management sees the unit on the AM Portfolio Dashboard as confirmed for sale.

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

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

#### 4. End of Tenancy Tasks

##### 4.1 Where Do I Find My Tasks?

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

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

**My EoT Tasks for Today**

Showing 20 of 20 items

Search this list...

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

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

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

**My Team's Unassigned EoT Tasks for Today**

Showing 4 of 4 items • 2 items selected

Search this list...

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

Assign Selected Tasks to Me

Filter by task name or unit.  
Add a comma to search for multiple names, e.g.: "ancoats, headline".

Shortcut to assign one or more tasks to yourself.

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

End Of Tenancy Tasks

My Open Tasks

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

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

## 4.2 The Task at a Glance

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

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

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

**Files:** Documents & emails can be linked to a task in the **Related** tab.

**Owner:** Person responsible for completing the task.

Tasks are initially assigned to a **Task Team** and should be allocated to an individual as start date approaches.

**Notes:** Capture any relevant notes about task progress; these may appear in reports.

**Information:** Guidance on what needs to be done before the task can be marked as complete.

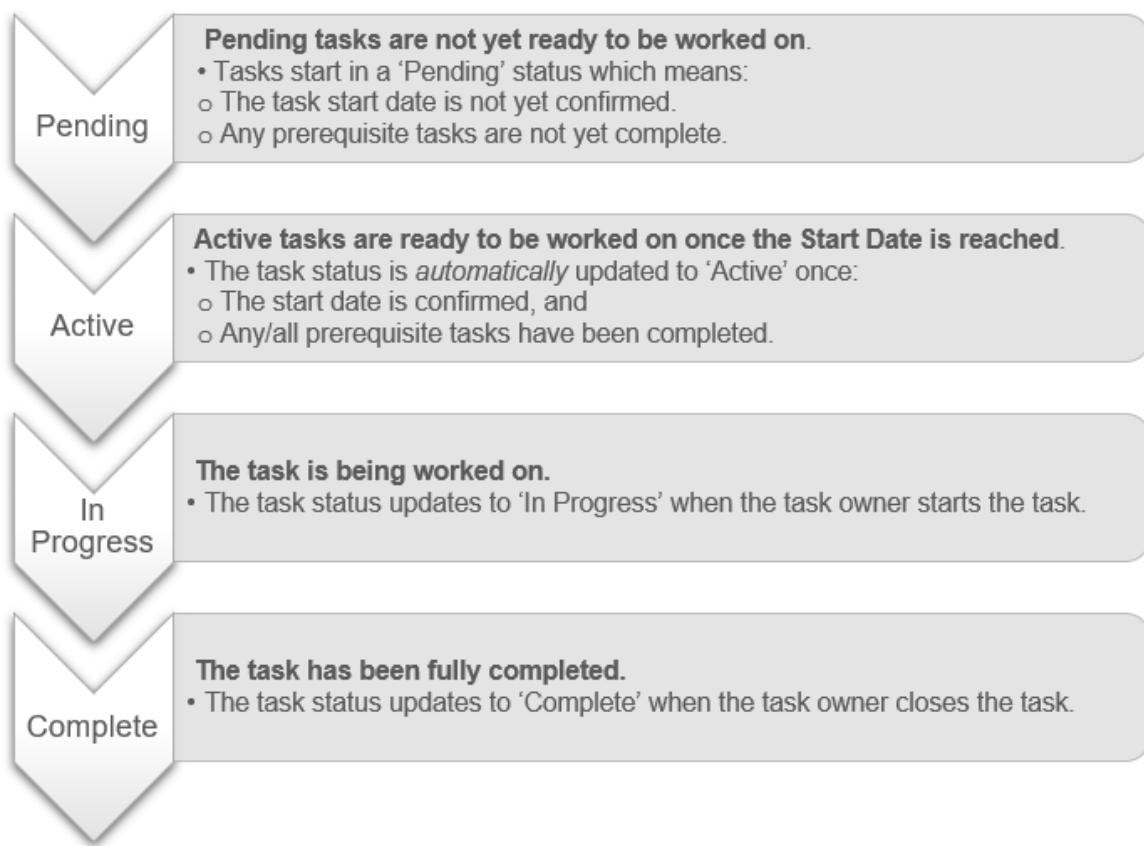
Details		Related	
End Of Tenancy Task Name	Confirm Notice	Owner	Hazel Armstrong
End Of Tenancy	EoT-00287	Task Status	Active
End Of Tenancy Phase	Receive Notice	Task Overdue	<input checked="" type="checkbox"/>
Unit	Apt 314, Abbeville Apts, 37 London Rd, Barkin	Task Team	Abbeville Apartments
<a href="#">Timing</a> <a href="#">Delay Details</a>			
<b>Additional Information</b> <p>Notes <a href="#">i</a></p> <p>Closure Reason <a href="#">i</a></p> <p>Information</p> <p>In order to complete this task:</p> <ul style="list-style-type: none"> <li>Notify residents that notice has been accepted or denied via phone call and email.</li> <li>Send DRI and Steps to Vacating forms to tenant for them to complete.</li> <li>Update key location on Unit.</li> <li>Update Qube.</li> </ul>			
Created By	Hazel Armstrong, 01/12/2023, 15:09	Last Modified By	Open box, 12/12/2023, 15:01

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

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

#### 4.3 Task Statuses

Tasks progress through a sequence of statuses:



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

#### 4.4 Starting a Task

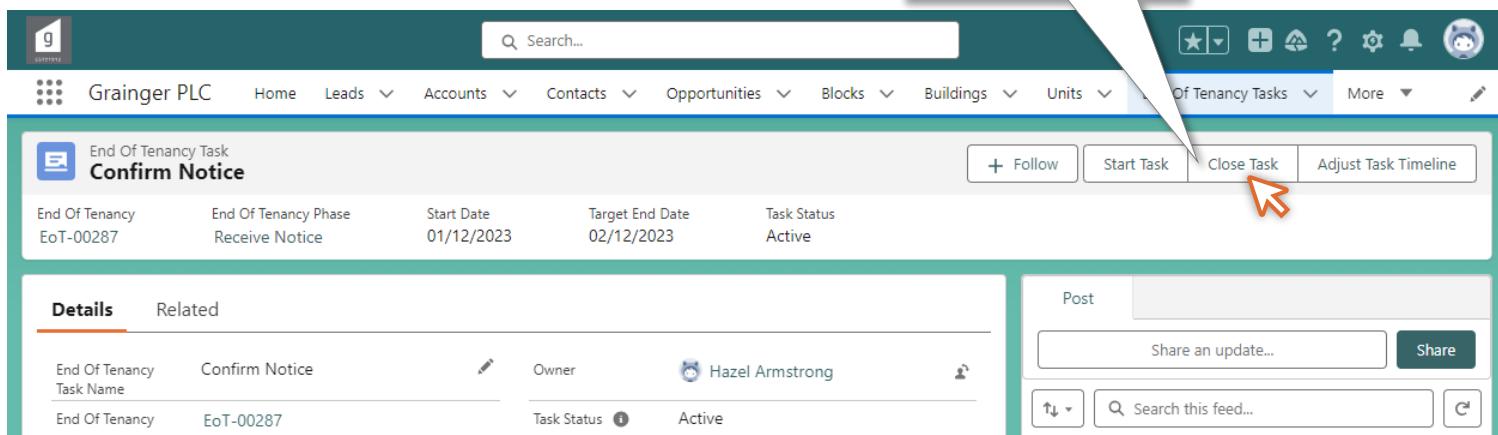
If you have started working on a task, but it is not yet complete:

Select '[Start Task](#)'

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

## 4.5 Completing a Task

Once a task is complete:



Select 'Close Task'

**End Of Tenancy Task**  
**Confirm Notice**

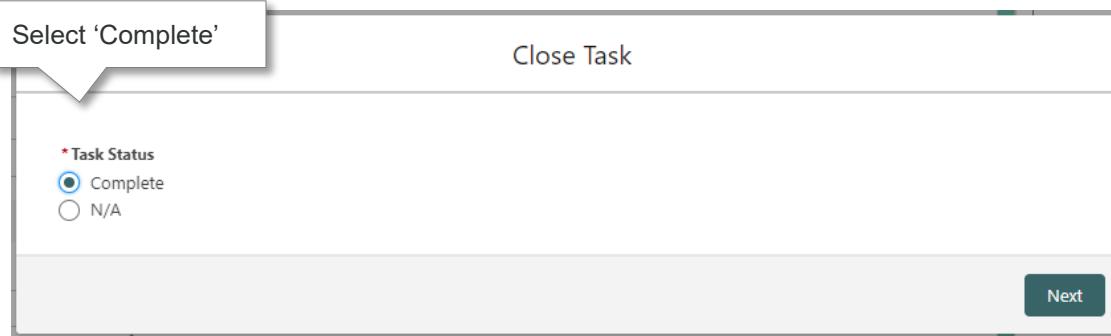
End Of Tenancy EoT-00287	End Of Tenancy Phase Receive Notice	Start Date 01/12/2023	Target End Date 02/12/2023	Task Status Active
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**Details**      Related

End Of Tenancy Task Name	Confirm Notice	Owner	Hazel Armstrong
End Of Tenancy	EoT-00287	Task Status	Active

Post  
Share an update...  
Share

Search this feed...  
Next

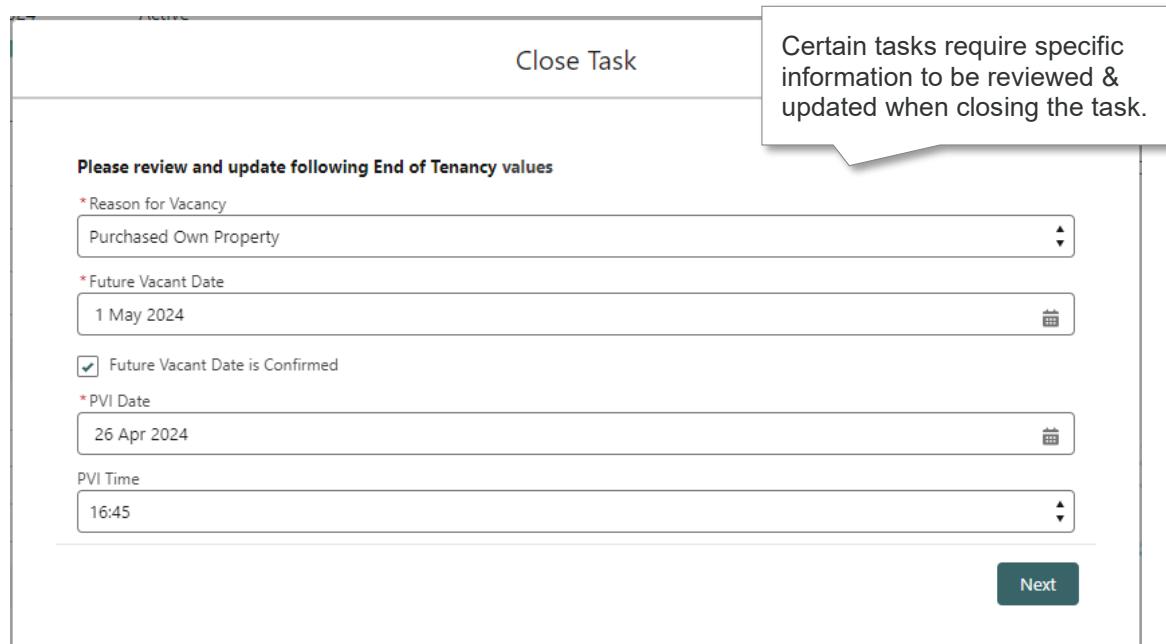


Select 'Complete'

**Close Task**

\* Task Status  
 Complete  
 N/A

Next



**Close Task**

Certain tasks require specific information to be reviewed & updated when closing the task.

Please review and update following End of Tenancy values

\* Reason for Vacancy  
Purchased Own Property

\* Future Vacant Date  
1 May 2024

Future Vacant Date is Confirmed

\* PVI Date  
26 Apr 2024

PVI Time  
16:45

Next

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

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

## (a) Axis Voids

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

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

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

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

Notify Stakeholders PVI Book Works Move Out Refurb/Refresh Release Deposit Complete

Current Phase: Notify Stakeholders

**Details** Related

> Information  
> Important Dates  
▼ Additional Details

Monthly Passing Rent: £0.00  
Reason for Vacancy: Relocation within City  
End of Tenancy Works Type: Refresh

Unit to be Relet  
Unit to be Sold

**PVI Notes for Axis**

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

#### 4.6 Setting Tasks to N/A

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

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

The screenshot shows the Salesforce 'End Of Tenancy Tasks' page. A specific task titled 'Approve Capex' is selected. The task details are as follows:

End Of Tenancy	EoT-00132	End Of Tenancy Phase	Book Works	Start Date	08/12/2023	Target End Date	11/12/2023	Task Status	Pending
----------------	-----------	----------------------	------------	------------	------------	-----------------	------------	-------------	---------

At the top right of the task card, there are several buttons: '+ Follow', 'Start Task', 'Close Task' (which has a red arrow pointing to it), and 'Adjust Task Timeline'. A callout bubble labeled 'Select 'Close Task'' points to the 'Close Task' button.

A modal window titled 'Select 'N/A'' is open, showing a single radio button option for 'N/A' under 'Task Status'. A 'Next' button is at the bottom right of the modal.

#### 4.7 Reopening a Closed Task

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

The screenshot shows the Salesforce 'End Of Tenancy Tasks' page. A specific task titled 'Close Down Tenancy' is selected. The task details are as follows:

End Of Tenancy	EoT-00247	End Of Tenancy Phase	Move Out	Start Date	13/12/2023	Target End Date	18/12/2023	Task Status	Complete
----------------	-----------	----------------------	----------	------------	------------	-----------------	------------	-------------	----------

At the top right of the task card, there are several buttons: '+ Follow', 'Open Task' (which has a red arrow pointing to it), and other standard buttons. A callout bubble labeled 'Select 'Open Task'' points to the 'Open Task' button.

A modal window titled 'Open Task' is open, showing a note: 'Set the task back to the previous status. See [Task Statuses](#) for more information.' Below this, a section titled 'Select Task Status' has three radio button options: 'Active', 'In Progress' (which is selected), and 'Pending'. A 'Next' button is at the bottom right of the modal.

#### 4.8 Expected Delays

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

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

Select 'Adjust Task Timeline'

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

End Of Tenancy Task Refresh

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

+ Follow Start Task Close Task Adjust Task Timeline

Select 'Adjust Timeline'

Adjust Task Timeline

\* Task Timeline  
 Adjust Timeline  
 Reset Timeline

Next

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

Adjust Task Timeline

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

\* Adjust Task Timeline Options  
 Expected Duration  
 Expected End Date

Days  
10

Note duration includes weekends & bank holidays.

Previous Next

The screenshot shows a Salesforce page for an 'End Of Tenancy Task' named 'Refurb'. Key details include:

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

**Details** tab selected.

**Timeline Fields:**

- Start Date:** 30/12/2023
- Actual Start Date:** (not visible)
- Expected Duration:** 20
- KPI Duration:** 15
- Target End Date:** 19/01/2024
- Actual End Date:** (not visible)

**Delay Details:**

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

Annotations explain the timeline fields:

- Expected Duration:** The task's **Expected Duration** is updated based on the adjustment entered, and the **Target End Date** is updated accordingly.
- KPI Duration:** KPI Duration reflects the original task duration before any adjustments were made to the task timeline.
- Expected Delay Days:** The number of days by which the task is delayed.
- The reason a task is delayed or overdue.

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

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

To **remove** an expected delay:

Select 'Adjust Task Timeline'

The screenshot shows the 'Adjust Task Timeline' modal. It includes:

- Task Timeline Options:**
  - Reset Timeline** (radio button selected)
  - Adjust Timeline**
- Confirmation Message:** Resetting the timeline will update task's expected duration to the original, KPI duration. Any delay reason and delay detail previously entered will be deleted.
- Checkboxes:**
  - I confirm that I want to reset task's timeline
- Next Button:** A green button labeled 'Next'.

Annotations explain the process:

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

#### 4.9 Overdue Tasks & Task Duration

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

The screenshot shows the 'End Of Tenancy Task' details for 'Book Works'. Key fields include:

- End Of Tenancy Task Name:** Book Works
- End Of Tenancy:** EoT-00172
- End Of Tenancy Phase:** Book Works
- Start Date:** 30/11/2023
- Target End Date:** 04/12/2023
- Task Status:** Complete
- Owner:** [Profile Icon]
- Task Overdue:**
- Task Team:** Centralised PM - Test

**Actual Duration:** Number of days from when the task should have started, to when it was completed.

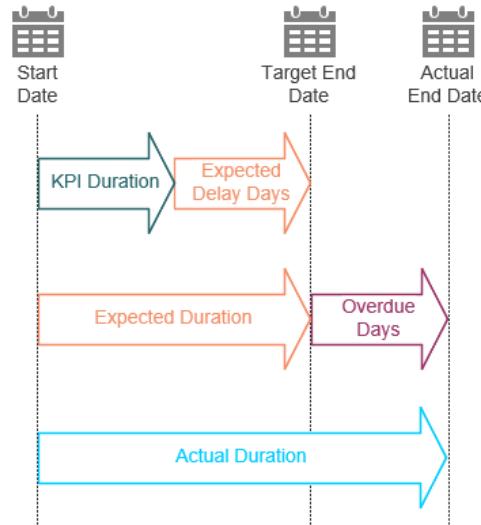
**KPI Duration:** Number of days this type of task is typically expected to take.

**Overdue Days:** Number of days by which the task is/was overdue.

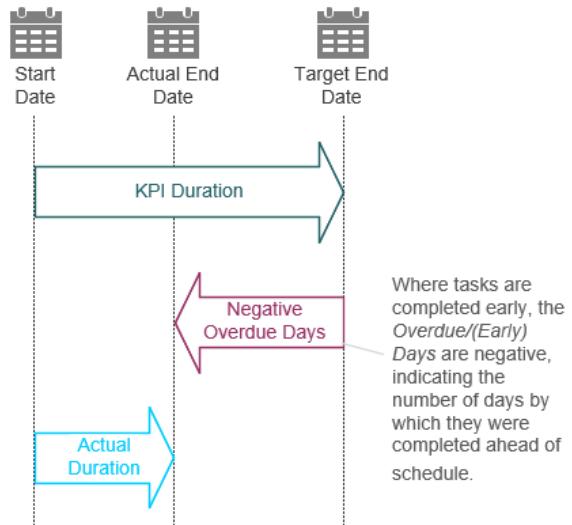
**Delay Reason:** Contractor Delays

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

A Delayed Task is Completed Late



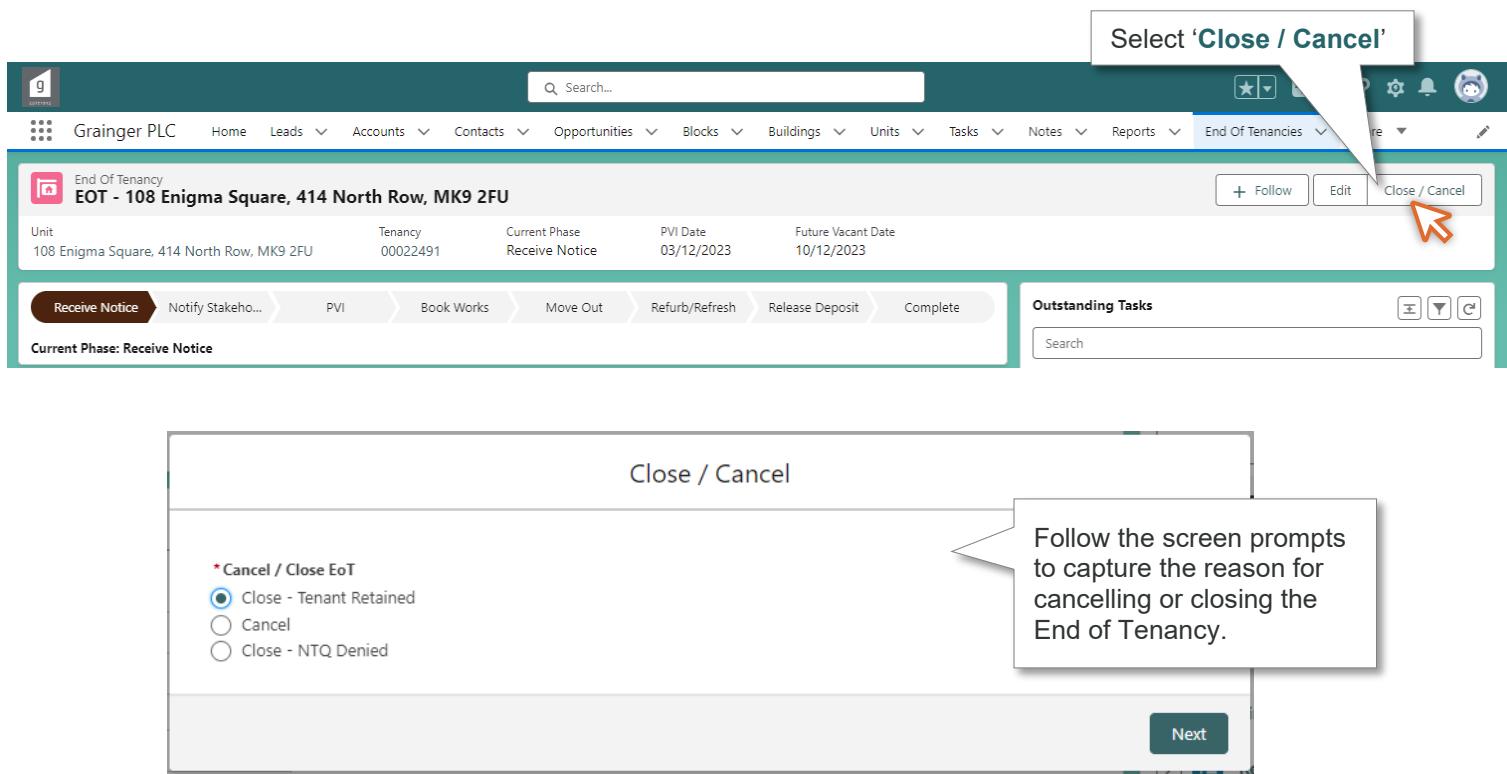
A Task is Completed Early



## 5. Cancel or Close an End of Tenancy

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

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



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

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

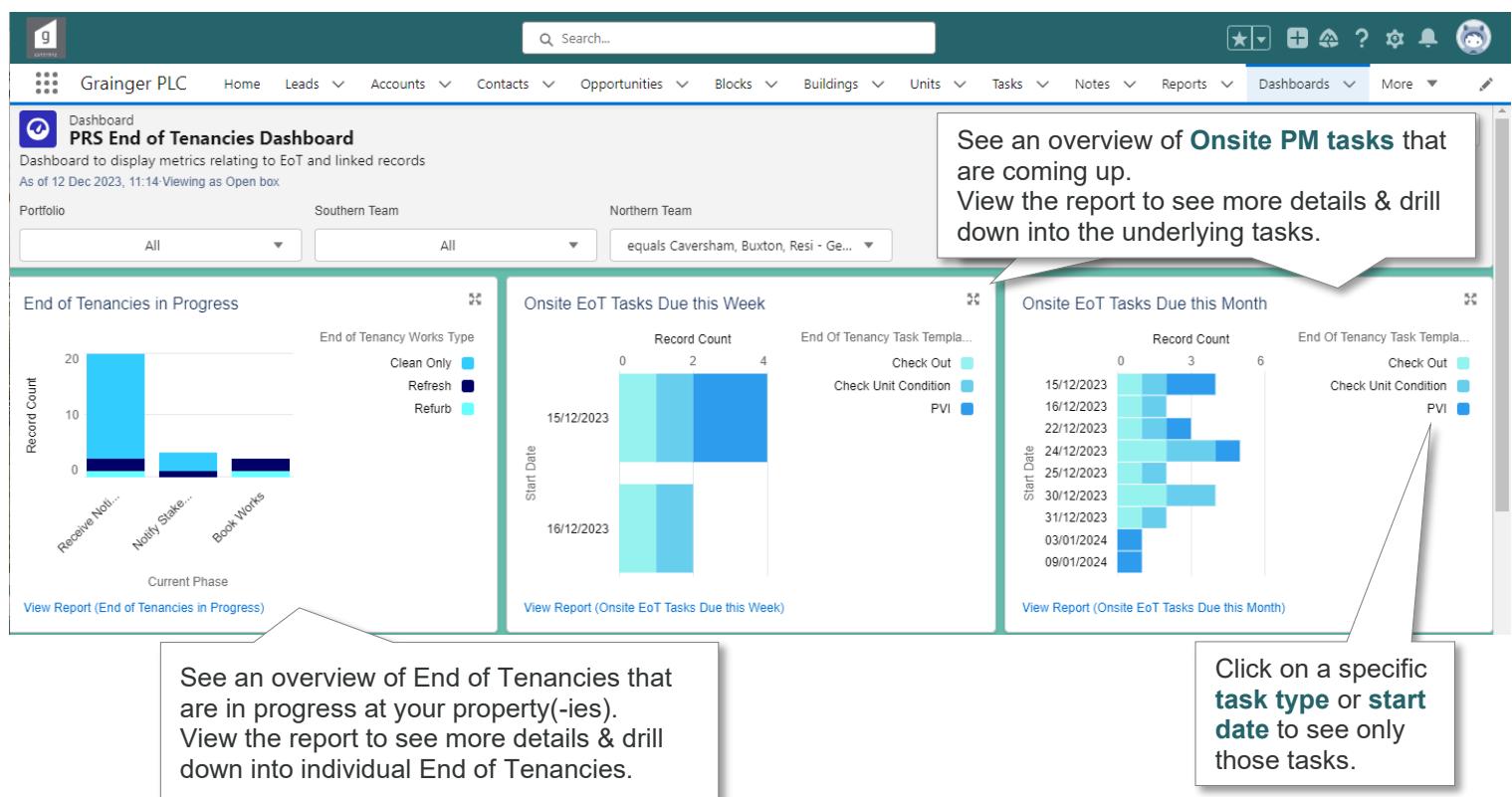
## 6. Reports & Dashboards

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

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

### 6.1 Onsite Property Management Reports

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

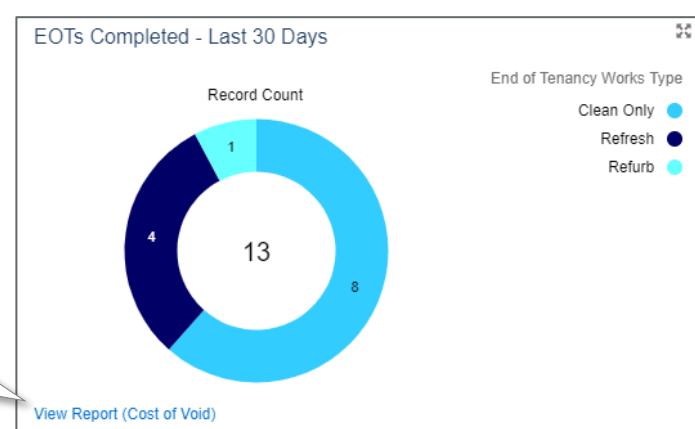


### 6.2 Cost of Void Report

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

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

[Generate the Cost of Void Report](#)



### 6.3 Asset Management Reports

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

Access the underlying report

Units Confirmed to be Sold

4

[View Report \(Units Confirmed to be Sold\)](#)

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

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

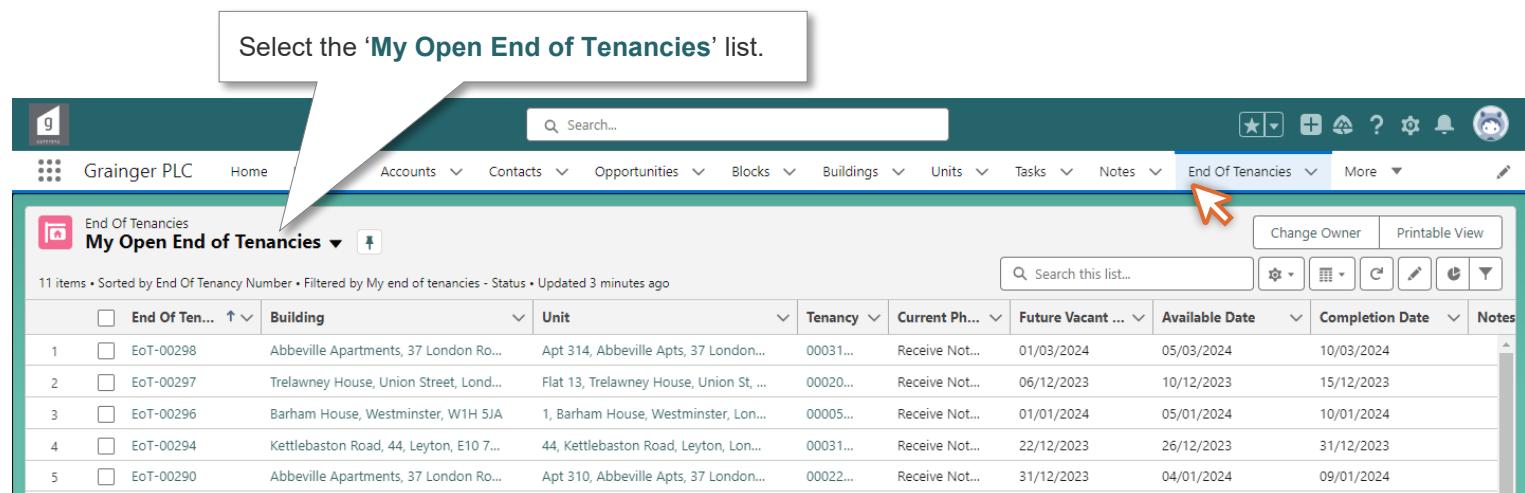
Total Records  
4

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

## 7. End of Tenancy Owners

### 7.1 Finding My End of Tenancies

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



Select the '**My Open End of Tenancies**' list.

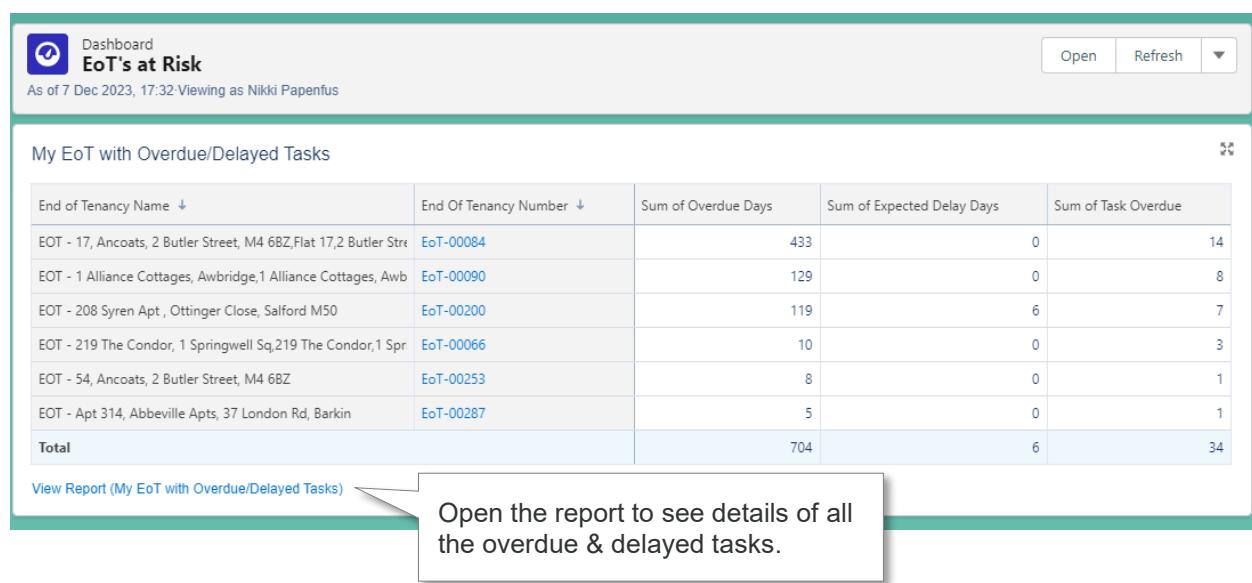
The screenshot shows the Salesforce home page with the 'Grainger PLC' logo. The top navigation bar includes links for Accounts, Contacts, Opportunities, Blocks, Buildings, Units, Tasks, Notes, and 'End Of Tenancies'. A callout box highlights the 'End Of Tenancies' link. Below the navigation bar, a search bar and various icons are visible. The main content area displays a list titled 'My Open End of Tenancies' with 11 items. The columns include End Of Tenancy Number, Building, Unit, Tenancy, Current Phase, Future Vacant Date, Available Date, Completion Date, and Notes. The data shows various properties and their current status.

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

### 7.2 End of Tenancies at Risk

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

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



**Dashboard EoT's at Risk**  
As of 7 Dec 2023, 17:32 Viewing as Nikki Papenfus

**My EoT with Overdue/Delayed Tasks**

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

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

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

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

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

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

**Items to Approve**

EoT-00084  
End Of Tenancy · Submitted by Hazel Armstrong

[View All](#)

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

Approval Request  
**End Of Tenancy Approval** Pending

Submitter Hazel Armstrong	Date Submitted 28 Nov 2023	Actual Approver Nikki Papenfus	Assigned To Nikki Papenfus
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**Details**

Approval Details

End Of Tenancy Number EoT-00084	End of Tenancy Name EOT - 17, Ancoats, 2 Butler Street, M4 6BZ.Flat 17.2 Butler Street,Manchester,M4 6BZ
Requested Close Status Closed - Tenant Retained	Close Detail Replacing damaged kitchen countertops
Close Reason Repair/Improvement Offered	Owner Nikki Papenfus

No Comments

**Approve or Reject the request.**

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