

Key Principles

- Each Case should have the same construct with progress bar relevant to the case type
- Each Case should have a Process/Case Type and KPI Traffic Light for reporting
- Each Case should hold Key Date and Audit Data for reporting purpose

The screenshot shows a web-based Case Management System for Grainger PLC. The top navigation bar includes links for Home, Units, Tenancies, Contacts, Blocks, Buildings, Dashboards, Reports, End Of Tenancies, End Of Tenancy Tasks, Opportunities, All, Tasks, Accounts, Notes, Cases, and More. A search bar and a user menu are also present.

The main content area displays a case titled "Appeal Received-RR On Hold". A horizontal progress bar at the top indicates the case's status: "Appeal Received-RR On Hold" (grey), "Written Representation" (grey), "FTT Hearing" (orange), "FTT Decision" (orange), and "RR Reactivated" (grey). Below the progress bar, the "Case Details" section shows the process is "Rent Review Process", the case type is "Formal Rent Challenge", and the KPI Tracker is "Green / Amber / Red". It also lists "Key Data" such as Stage/Status, Date Received, and Informal Rent Challenge Received, along with a link to 1267 linked cases.

The "Audit Tracker" section contains details about the appeal decision, including Date Reply Form Submitted, Date Written Rep Returned, Date of FTT Hearing, Current Rent, Rent Applied for, Rent Increase Percentage, FTT Decision (Won/Lost), Reason for Decision, Comparable data / Repairs, Appeal Decision, Appeal Decision Percentage, Time Taken from Appeal to Decision (4 Weeks, 2 Days), and Rent Loss.

The "Appeal Overview" section states: "Customer informally appealed and reduction request was rejected, formal appeal then received".

The "Feed" section allows users to Email, Post, or Log a Call, with a text input field for writing an email. It also displays the most recent activity, which is a case creation by Lynn Robson on 1 August 2023 at 16:30.

The "Reporter Details" section provides contact information for Nick Nasty, including Name, Unit Address, Phone, and Email. It also includes an "Open Opportunity Contact Roles (0)" button.

On the left side, there are sections for "Open Activities (0)", "Activity History (0)", "Notes (0)", and "Files (0)".

Orange callouts provide additional context:

- "Progress bar" points to the top navigation bar.
- "Process Case Type KPI Traffic Light" points to the "Case Details" section.
- "Key Data Audit Tracker" points to the "Audit Tracker" section.
- "High Level Overview" points to the "Appeal Overview" section.
- "Notes & Files to the case" points to the "Notes (0)" and "Files (0)" sections.
- "Any actions/Communication Templates to be stored" points to the "Notes (0)" and "Files (0)" sections.
- "Email & Comms to be sent through the Case Functionality" points to the "Feed" section.
- "Single or Multiple reporter contact Details to be recorded" points to the "Reporter Details" section.

Notes & Files to the case

Any actions/Communication Templates to be stored

Email & Comms to be sent through the Case Functionality

Progress bar

Process Case Type KPI Traffic Light

Key Data Audit Tracker

High Level Overview

Single or Multiple reporter contact Details to be recorded

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https://graingerplc.lightning.force.com/lightning/r/Case/500Nz000001aHpuIAE/view

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Case Reported Passed to H&S H&S Audit Closure + Follow

Case Details

Process: Incident Management
Case Type: Incident
KPI Tracker: Green / Amber / Red

Key Data

Stage/Status : Incident Injury
Date of Incident: Date Selector
Other/Previous Incidents Linked: No
Linked Incident Cases: 0
Was the Incident a result of ABS: Yes/No selector

Non - ABS Incidents

Location of Incident: Grainger Office
Incident Category: Slip/Trip/Fall
What caused the incident: falling Object
Person Involved: Employee

Case Overview

Ongoing incidents of ASB behaviours with resident being abusive and causing disruption to other residents with late night parties and signs of drug use.

Health & Safety Audit

Fire Safety Report: No
Escalate or Information Only: Information Only
RIDDOR Reportable: No

Feed

Email Post Log a Call Write an email... Compose

Most Recent Activity ▾ Search this feed... U C

All Updates Emails Call Logs Text Posts Status Changes

Lynn Robson 1 August 2023 at 16:30 Case created

Subject: Priority: Medium Status: New Case Number: 00001032

Open Activities (0) Activity History (0) Notes (0) Files (0)

Upload Files

Reporter Details 1

Name: Office Manager
Unit Address: 100 End Street, London
Phone: 027364023476
Email: Test@Test.gmail.com

Person Affected

Name: Mr Upset
Unit Address: 100 End Street, London
Phone: 027364023476
Email: Test@Test.gmail.com

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Case Fundamental Stage 1 Stage 2 Stage 3 S8 Proceedings + Follow

Case Details

Process: Incident Management
Case Type: ASB Possession
KPI Tracker: Green / Amber / Red

Key Data

Stage/Status : Category 3 – Possession Notice Issues
Incident reported: Date Selector
Other/Previous Incidents Linked: Yes
Linked Incident Cases: 1267 / 1345 / 1645

Section 8 Audit Tracker

Grounds for Possession: S8/Ground 14
Date Notice Served: Date Selector
Arrears at time of Notice : Value Figure
Date of Notice Expiry: Date Selector
Court Issued to: Free Text
Date of Hearing: Date Selector
Bailiffs Required: Y/N option
Date of Possession: Date Selector
Time Taken from Notice to Decision: 9 Weeks, 2 Days
Rent Loss: Value

Case Overview

Ongoing incidents of ASB behaviours with resident being abusive and causing disruption to other residents with late night parties and signs of drug use.

Feed

Email Post Log a Call

Write an email... Compose

Most Recent Activity ▾ Search this feed...

All Updates Emails Call Logs Text Posts Status Changes

Lynn Robson 1 August 2023 at 16:30 Case created

Subject: Priority: Medium Status: New Case Number: 00001032

Open Activities (0) Activity History (0) Notes (0) Files (0)

Upload Files

Perpetrator Details

Name: Nick Nasty
Unit Address: 101 End Street, London
Phone: 027364023476
Email: Test@Test.gmail.com

Reporter Details 1

Name: Mr Upset
Unit Address: 100 End Street, London
Phone: 027364023476
Email: Test@Test.gmail.com

Reporter Details 2

Name: Not Happy
Unit Address: 103 End Street, London
Phone: 027364023476
Email: Test@Test.gmail.com

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Case Request Open Review Approval Policy Sign Closure + Follow

Case Details

Process: Pet Management
Case Type: New Applicant Request
KPI Tracker: Green / Amber / Red

Key Data

Stage/Status: Request Accepted Policy Issued for sign
Unit Applied for: 1 Gilders Yard, Birmingham.
Move In Date: Date Selector
Unit marked as Pet Friendly: Yes/No
Building Capacity: 10%
Floor Capacity: 25%

Audit Tracker

Date of Application: Date Selector
Date Acknowledge: Date Selector
Approved/Rejected by: Named User
Date Approved/Rejected: Date Selector
Reason for rejection (if app): Selection List
Application Retained/Lost: Selection List
Complaint Raised: Y/N option

Request Overview

Applicant has 2 small dogs and both within the permitted pet range

Feed

Email Post Log a Call Write an email... Compose

Most Recent Activity Search this feed...

All Updates Emails Call Logs Text Posts Status Changes

Lynn Robson 1 August 2023 at 16:30 Case created Subject: Priority: Medium Status: New Case Number: 00001032

Open Activities (0) Activity History (0) Notes (0) Files (0)

Applicant

Name: Mr D Lover
Application Address: 1 Gilders Yard
Phone: 027364023476
Email: Test@Test.gmail.com

Pet 1

Type: Dog
Type: Chiwawa
Name: Pete
Age: 2 year +
Tag/Chop Reference: DG76534

Pet 2

Type: Dog
Type: Chiwawa
Name: Roger
Age: 2 year +
Tag/Chop Reference: DG76534

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Case Informal Challenge received Approval (outside of scope) Negotiation Won/Lost Closure + Follow

Case Details

Process: Rent Review Process
Case Type: Informal Rent Challenge
KPI Tracker: Green / Amber / Red

Key Data

Stage/Status : At Rent Increase notification
Date Received: Date Selector

Audit Tracker

Current Rent: Value
Rent Applied for: Value
Rent Increase Percentage: %

Asset Man Approval: N/A within tolerance
Reason for Decision: Comparable data
Appeal Rent: Value
Appeal Decision Percentage: %

Appeal Overview

Customer called to challenge rent due to outstanding repairs & Lack of Service, threatened to hand notice if rent increased.

Feed

Email Post Log a Call Write an email... Compose

Most Recent Activity Search this feed...

All Updates Emails Call Logs Text Posts Status Changes

Lynn Robson 1 August 2023 at 16:30 Case created

Subject: Priority: Medium Status: New Case Number: 00001032

Reporter Details

Name: Nick Nasty
Unit Address: 101 End Street, London
Phone: 027364023476
Email: Test@Test.gmail.com

Open Opportunity Contact Roles (0)

Open Activities (0)
Activity History (0)
Notes (0)
Files (0)

Upload Files

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Grainger PLC Home Units Tenancies Contacts Blocks Buildings Dashboards Reports End Of Tenancies End Of Tenancy Tasks Opportunities All Tasks Accounts Notes Cases More

Case Appeal Received-RR On Hold Written Representation FTT Hearing FTT Decision RR Reactivated + Follow

Case Details

Process: Rent Review Process
Case Type: Formal Rent Challenge
KPI Tracker: Green / Amber / Red

Key Data

Stage/Status: Awaiting FTT Hearing
Date Received: Date Selector
Informal Rent Challenge Received: Yes
Linked Cases: [1267](#)

Audit Tracker

Date Reply Form Submitted: Date Selector
Date Written Rep Returned: Date Selector
Date of FTT Hearing: Value Figure
Current Rent: Value
Rent Applied for: Value
Rent Increase Percentage: %
FTT Decision: Won/Lost
Reason for Decision: Comparable data / Repairs
Appeal Decision: Value
Appeal Decision Percentage: %
Time Taken from Appeal to Decision: 4 Weeks, 2 Days
Rent Loss: Value

Appeal Overview

Customer informally appealed and reduction request was rejected, formal appeal then received

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Lynn Robson 1 August 2023 at 16:30 Case created Subject: Priority: Medium Status: New Case Number: 00001032

Open Activities (0) Activity History (0) Notes (0) Files (0)

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Reporter Details

Name: Nick Nasty
Unit Address: 101 End Street, London
Phone: 027364023476
Email: Test@Test.gmail.com

Open Opportunity Contact Roles (0)