

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 displays a web application interface for 'Grainger PLC'. At the top, a 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 is also present. Below the navigation bar, a progress bar shows the case stages: 'Appeal Received-RR On Hold', 'Written Representation', 'FTT Hearing', 'FTT Decision' (highlighted in orange), and 'RR Reactivated'. The main content area is divided into three columns. The left column, titled 'Case Details', contains sections for '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), and 'Appeal Overview' (Customer informally appealed and reduction request was rejected, formal appeal then received). The middle column, titled 'Feed', includes a 'Post' section with a 'Write an email...' field and a 'Compose' button, and a 'Most Recent Activity' section with a search bar and tabs for 'All Updates', 'Emails', 'Call Logs', 'Text Posts', and 'Status Changes'. The right column, titled 'Reporter Details', shows the name 'Nick Nasty', unit address '101 End Street, London', phone '027364023476', and email 'Test@Test@gmail.com'. Below the main content area, there are sections for 'Open Activities (0)', 'Activity History (0)', 'Notes (0)', and 'Files (0)'. Callout boxes with orange borders point to various elements: 'Progress bar' points to the progress bar; 'Process Case Type KPI Traffic Light' points to the 'Process', 'Case Type', and 'KPI Tracker' fields; 'Key Data Audit Tracker' points to the 'Key Data' and 'Audit Tracker' sections; '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 'Activity History (0)' section; 'Email & Comms to be sent through the Case Functionality' points to the 'Emails' tab in the 'Feed' section; and 'Single or Multiple reporter contact Details to be recorded' points to the 'Reporter Details' section.

Progress bar

Process
Case Type
KPI Traffic Light

Key Data
Audit Tracker

High Level
Overview

Notes & Files to
the case

Any actions/Communication
Templates to be stored

Email & Comms to be sent
through the Case
Functionality

Single or Multiple
reporter contact
Details to be
recorded

00001032 | Case | Salesforce

https://graingerplc.lightning.force.com/lightning/r/Case/500Nz000001aHpulAE/view

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Search...

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Grainger PLC

Home

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End Of Tenancy Tasks

Opportunities

All

Tasks

Accounts

Notes

Cases

More

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.

Heath & 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...

🔍

🔄

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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GRAINGER PLC

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End Of Tenancy Tasks

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More

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...

Icons

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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More

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

EmailPostLog 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:

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Status: New

Case Number: 00001032

Open Activities (0)

Activity History (0)

Notes (0)

Files (0)

Upload Files

Applicant

Name: Mr D Lover

Application Address 1 Gilders Yard

Phone 027364023476

Email :Test@Test.gmail.com

Pet 1

Type: Dog

Type: Chihuahua

Name: Pete

Age: 2year +

Tag/Chop Reference: DG76534

Pet 2

Type: Dog

Type: Chihuahua

Name: Roger

Age: 2year +

Tag/Chop Reference: DG76534

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End Of Tenancies

End Of Tenancy Tasks

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All

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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

EmailPostLog a Call

Write an email...Compose

Most Recent Activity

Search this feed...

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All Updates

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Subject:

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🔗

Open Activities (0)

Activity History (0)

Notes (0)

Files (0)

Upload Files

Reporter Details

Name: Nick Nasty

Unit Address 101 End Street, London

Phone 027364023476

Email :Test@Test.gmail.com

Open Opportunity Contact Roles (0)

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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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Reporter Details

Name: [Nick Nasty](#)

Unit Address [101 End Street, London](#)

Phone [027364023476](#)

Email :[Test@Test.gmail.com](#)

Open Opportunity Contact Roles (0)