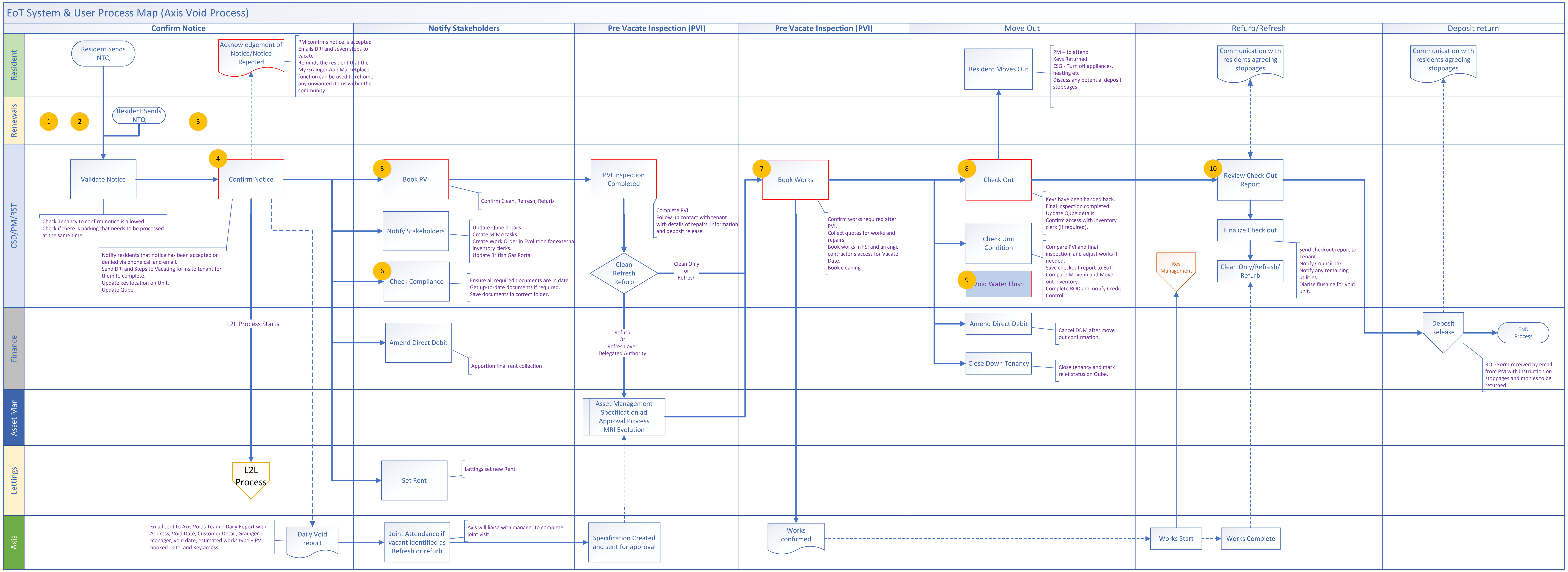

1

The ability to Provide Notice through the Grainger App

A customer can create the request to end their tenancy from the Grainger App

The form has validations to ensure the customer has the right to terminate, the notice to vacate must be a minimum of two months under Renters rights, and the comms are clear that Grainger will confirm in writing

Using a link in the app to a form assembly form, this creates an EOT task and a Parking EOT if additional parking is rented

- Content and task details to be agreed

2

New EOT Template – Garage/Parking EOT

A greatly reduced template to allow parking/Garage accounts to be closed down.
- Content and task details to be agreed

3

RBAC Controls

Check with Dan Snelling as role based controls are being looked at as a separate piece or if this would be controlled within the task

System Requirements – to stop users completing tasks outside of their remit/department tasks

Reporting -

As you revie the task requirements, think of how we can develop the dashboard further to support the process

The dashboard should make it easy for a user to see what stage the move out is at, where we are overdue and prioritise actions needed from the users to progress the EOT tasks

4

Confirm Notice –
Task Steps
1- Enter Resident Notice accepted and future vacant date
When the user updates the confirm notice task an auto responder should be created and sent to the task owner to be updated and sent out to the resident (NOTE: the email should be sent from Salesforce not a user outlook account to ensure this is recorded). (Comms Template to be created)
This includes:
- 10 steps to move out guide
- link to Form Assembly to complete the DRI (Deposit Return Instruction)
- A copy of the Move In Inventory
- confirmation that Grainger will be attending to complete a PVI
- Confirmation of the date the resident move out will be completed
- Confirmation of any linked Parking/Garage tenancies will be terminated at the same time
- Instructions on how/where to return the keys if not an RST building with on site-team

2 – Enter Key Location

3 – Workflow integration should update Qube Future Vacant Date

Workflow Requirements
- Form assembly to be used for the resident t complete the DRI, upon completion the data populates back into the Return of Deposit Task
- DRI - If resident does not open and complete the DRI form within 5 days, an auto responder is sent chasing
- DRI - If resident does not open and complete the DRI form within 10 days, a 2nd auto responder is sent chasing
- Identification of a linked Garage/Paring creates a new template for Garage/Parking EOT's

Integration Requirements
- On completion of the expected Vacant Date – Salesforce should integrate and update the Qube Future Void Date
- There is a separate integration requirements document collating all integration work into one deliverable

5

Booking the PVI and Completing the PVI tasks to be reduced into 1 task

Task steps
1 - Enter a scheduled/booked date – this then sends a responder to the resident to confirm that Grainger will be attending to inspect the property (Comms template to be created)

2 - Enter Date attended – to confirm the date the PVI was completed

3 - Enter works Required (No Works, Clean, Minor refresh, Full Refresh, Refurb – To be agreed with KPI Dates)

4 – Confirm DRI has been returned Y/N

4 – Send PVI Follow Up Responder (Y/N) Y=This creates a template and sends to the customer – on the task a comments box allows the operative to identify works required by the resident to prevent stoppages from the deposit) (Comms Template to be crated).

6

Check Compliance

Discuss process requirement for the centralised compliance team to upload Gas and Electric Certs to Salesforce as part of their SOP

Task steps
1 – User to check the certs saved onto the Unit folder match the dates on the Validation Check

2 – Missing certs to be uploaded and the validation check completed

7

Book Works - Change to Void Works

Task steps
1 – Enter detail of works required – Comments Box

2 – Enter Current Phase drop list:
(Quotes Stage/Contract Instructed awaiting start/Works In Progress/Works Delayed/Works Complete

3 - Enter the contractor details instructed Name & Cost of works

4 – Enter estimated RTL Date – which should update the ready to let date

5 - Enter works Start Date

6 – Enter Delayed RTL Date – which should update the ready to let date
workflow sends a warning responder to the Lettings Team if this date is updated/emended

7 – Works Completed date

8 – Unit RTL date Confirmed

Workflow requirements
The RLT data should update when the dates are entered for estimated RTL and Delayed RTL fields are updated
An auto responder should be sent to the lettings team if the delayed RTL date is entered, or updated to warn them of the works delay

8

Check Out

Date Vacant Field – integrates the date to Qube

Integration Requirements
- On completion of the Vacant Date – Salesforce should integrate and update the Qube Date Vacant
- There is a separate integration requirements document collating all integration work into one deliverable

9

NEW – Water Flushing Task

Once the check out date is confirmed, a water flush task should be completed to manage the weekly water flushing

Task steps

1- Water Flush Required Date (due by date is 7 days from vacant date)

Task shows dates of previous flushes completed
Task has a compliance status as OVERDUE where the flush has exceeded the 7 day KPI

Workflow Requirements – the task allows the user to update the date and then re-sets to seven days, there is a task status that identifies as overdue if the flushes are not completed within the KPI.

10

Review Check Out Report - Change to Return of Deposit

This task is to manage the deport ROD
(NOTE: emails should be sent from Salesforce not a user outlook account to ensure this is recorded).
(Comms Template to be created)
The DRI information should be populated from the resident completing the DRI Instruction form through form assembly
The task has a KPI of 10 days for the deposit to be released as per the deposit management regulations
The Task should have a countdown clock in Days showing how many days left to process the deposit

Task steps
1 – Confirm that the resident is aware of the final deposit amount being returned if any
Yes / No Response

2 – Does the resident agree with the stoppages made
Yes / No /In Dispute/ No Response

3 – Complete the deposit stoppages (if any) onto the ROD task fields
System to replicate the ROD Template on the task
Include marker for any stoppages that have been challenged/disputed

4 – Confirm Deposit Release – add CC Controller Name from list - (this activates the deposit release task to Finance and informs CC)

5 – Send Deposit Confirmation Comms
Yes – this sends the resident a communication to confirm the amount being returned with any stoppages broken out

6 – TDS Dispute registered – date and amount disputed

7 – Date evidence submitted to TDS

8 – TDS Decision – Upheld / Not Upheld - Monies to be returned £

9 – Confirm Disputed Deposit Release– add CC Controller Name from list - (this activates the disputed deposit release task to Finance)