



AC Housing User Guide

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Installation and Configuration

Set Up Permissions

The AC Housing comes with custom objects and fields. In order for users to use the package functionality, you need to configure access for them. You can provide access in two ways:

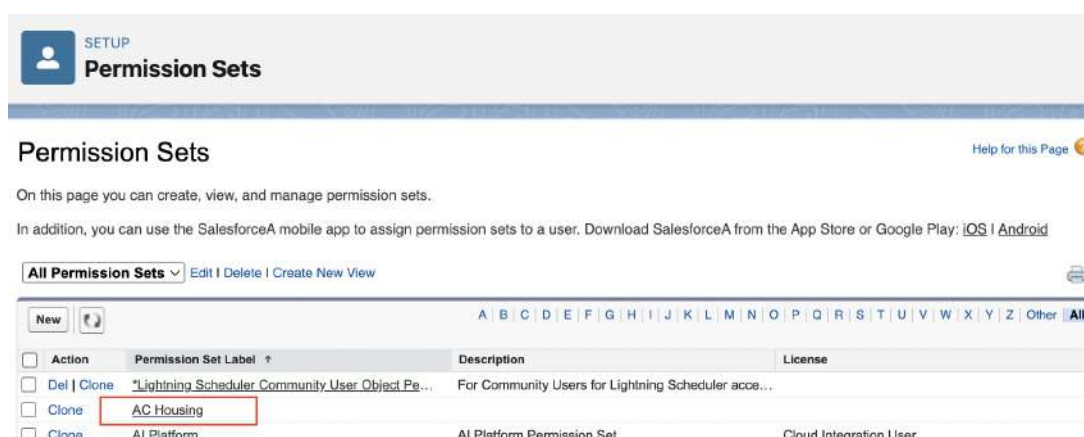
- Assign users the appropriate permission set that comes with the package (Recommended)
- Manually configure user profile/permissions set

Assign Users Appropriate Permission Set

We recommend using the “**AC Housing**” permission set provided in the package. The permission set grants access to custom metadata provided by the package, such as application, apex classes, custom fields, etc.

How to assign a permission set to a user:

In the Setup, enter Permission Sets in the Quick Find box and select Permission Sets. Then click on the ‘AC Housing’ permission set.



Then click the ‘Manage assignment’ button.

SETUP

Permission Sets

Permission Set

AC Housing

Video

Clone

Manage Assignments

Permission Set Overview

Description	API Name	AC_Housing
License	Namespace Prefix	ac_housing
Session Activation Required ☐	Created By	Stas Dunayev, 10/10/2022
Last Modified By	Stas Dunayev, 10/10/2022, 10:29	

Click the 'Add Assignments' button and assign the permission set to users who need access to the AC Housing app.

SETUP

Permission Sets

Assigned Users

AC Housing

Help for this Page

« Back to: Permission Set

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Add Assignments

Remove Assignments

Full Name ↑	Alias	Username	Role	Active	Profile	Expires On
No records to display.						

Add Assignments

Remove Assignments

The example of result:

SETUP

Permission Sets

Assigned Users

AC Housing

Help for this Page

« Back to: Permission Set

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Add Assignments

Remove Assignments

☐ Action	Full Name ↑	Alias	Username	Role	Active	Profile	Expires On
☐ Edit	Opyata, Vladimir	VOpya	ac-housing-management-sr@advancedcommunities.com		✓	System Administrator	

Add Assignments

Remove Assignments

Configure User Profile/Permissions Set

Warning: We strongly recommend you to use the permission set provided by the package instead of setting up a user profile. With permission set assigned, you can easily upgrade apps, minimize efforts and maintenance breaks.

If you decide to set up a user profile anyway, set it up according to the permissions described below:

- Organization-Wide Defaults
- Assign App
- Tab Visibility
- System Permissions
- Object Permissions and Field-Level Security
- Record Type Assignments
- Apex Classes Access

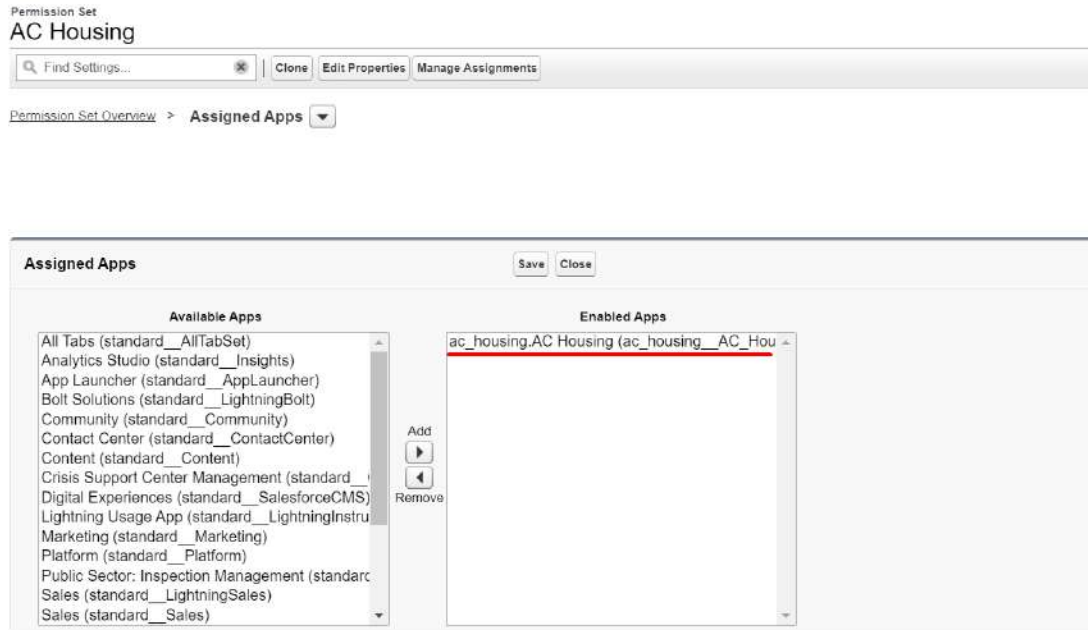
Organization-Wide Defaults

You can set up the sharing settings to suit your business logic, but we recommend starting with Private access and only extending it if it is really needed.

Assign App

To use the AC Housing app, you need to grant access to the user:

Open Profile/Permission Set -> Assigned Apps -> Edit -> Move ac_housing.AC Housing app to Enabled Apps column.



Tab Visibility

Make these tabs visible:

- Home
- Dashboards
- Reports
- Accounts
- Contacts
- Tenancies
- Properties
- Voids
- Arrears
- Payments
- Housing Benefits
- Void Workflows
- Void Tasks
- Arrear Tasks
- Arrear Workflows
- AC Housing Settings

System Permissions

Grant users the following system permissions:

- Run Reports
- Lightning Experience User

Object Permissions and Field-Level Security

Give permissions to these standard and custom objects:

- Accounts
- Contacts
- Opportunities
- AC Housing Settings
- Housing Benefits
- Tenancies
- Properties
- Property Blocks
- Payments
- Payment AR Allocations
- Milestones
- Void
- Void Tasks
- Void Workflows
- Void Workflow Tasks
- Arrears
- Arrear Tasks
- Arrear Workflows
- Arrear Workflow Tasks

Objects and Fields	AC Housing User
Accounts	Read, Create, Edit, Delete
Amount Of Children	Read, Edit
Household Proposed Rent	Read
Sum Of Tenants Proposed Rents	Read, Edit
Contacts	Read, Create, Edit, Delete
Allowances Paid For Fostering Children	Read, Edit

Objects and Fields	AC Housing User
Assessable Income	Read
CE/Training Fuel & Travel	Read, Edit
CE Schemes, Back To Work, VEC Schemes	Read, Edit
Charitable Organizations	Read, Edit
Child Benefit	Read, Edit
Child Maintenance	Read, Edit
Christmas Bonus Payments	Read, Edit
Domiciliary Care Of Disabled Children	Read, Edit
Employment Income	Read, Edit
FAS Training Allowances	Read, Edit
Full Rate Carer's Allowance	Read, Edit
Half-Rate Carer	Read, Edit
Health Board / Welfare	Read, Edit
Health Board Medical / Dietary	Read, Edit
Household Proposed Rent	Read
Income From Overtime Worked	Read, Edit
Is Eligible For Housing Benefit	Read, Edit
Living Alone Allowance	Read, Edit
Pension/Other Sources	Read, Edit
Scholarships And Educational Grants	Read, Edit
Social Insurance	Read, Edit
Social Welfare Fuel Allowance	Read, Edit
Spouse/Partner Maintenance	Read, Edit
Tenant Proposed Rent	Read
Type	Read, Edit
Working Family Payment	Read, Edit
Opportunities	Read, Edit
Activity Status	Read
Amount	Read
Collection Status	Read

Objects and Fields	AC Housing User
Due Date	Read
Effective Date	Read
Health Image	Read
Left To Pay	Read
Payment Reference	Read
Tenancy	Read
AC Housing Settings	Read, Create, Edit, Delete
Current Tenant Proposed Rent API Name	Read, Edit
Housing Benefits	Read, Create, Edit, Delete
Applicability Note	Read, Edit
Tenant	Read, Edit
Tenancies	Read, Create, Edit
End Date	Read
Has Void	Read
Notes	Read, Edit
Notice Date	Read, Edit
Notice Period (days)	Read, Edit
Number Of Account Receivables	Read, Edit
Number Of Account Receivables Prolongate	Read, Edit
Payment Frequency	Read
Prolongation Date	Read
Prolongation Period (days)	Read, Edit
Property	Read, Edit
Property Type	Read
Rent Amount	Read, Edit
Rent Amount Prolongate	Read, Edit
Start Date	Read, Edit
Tenant	Read, Edit
Tenant Balance	Read
Properties	Read, Create, Edit, Delete

Objects and Fields	AC Housing User
Active Tenancy Exist	Read
Address	Read, Edit
Property Block	Read, Edit
Rent Status	Read, Edit
Property Blocks	Read, Create, Edit, Delete
Payments	Read, Create, Edit, Delete
Allocation Left Amount	Read
Property Address	Read
Tenancy	Read, Edit
Tenant	Read
Payment AR Allocations	Read
Account Receivable	Read
Amount	Read
Milestones	Read
Active	Read
Milestone	Read
Milestone Progress	Read
Percentage Done	Read
Void	Read, Create, Edit
Current Milestone	Read
Daily Rent Loss	Read
Last Rent Amount	Read
Payment Frequency	Read
Property	Read
Rent Loss	Read
Status	Read, Edit
Task Cost Loss Amount	Read
Total Loss	Read
Void Actual End Date	Read, Edit
Void Start Date	Read

Objects and Fields	AC Housing User
Void Workflow	Read
Void Tasks	Read, Create, Edit, Delete
Address	Read
Cost Amount	Read, Edit
Milestone Name	Read, Edit
Notes	Read, Edit
Portion Of Milestone	Read
Task Progress	Read
Task Record Type	Read, Edit
Task Type	Read, Edit
Void Workflows	Read, Create, Edit, Delete
Active	Read, Edit
Property Type	Read, Edit
Void Workflow Tasks	Read, Create, Edit, Delete
Task Record Type	Read, Edit
Arrears	Read, Create, Edit, Delete
Amount	Read
Arrear Workflow	Read
Current Milestone	Read
End Date	Read
Fully Paid	Read
Start Date	Read
Status	Read
Status Image	Read
Tenant	Read
Arrear Tasks	Read, Create, Edit, Delete
Arrear Milestone	Read
Arrear Milestone Duration (days)	Read
Arrear Task Type	Read
Notes	Read, Edit

Objects and Fields	AC Housing User
Task Progress	Read
Task Status	Read, Edit
Arrear Workflows	Read, Create, Edit, Delete
Active	Read, Edit
Arrear Workflow Tasks	Read, Create, Edit, Delete
Arrear Milestone	Read, Edit
Arrear Milestone Duration (days)	Read, Edit
Arrear Task Creation Delay (days)	Read, Edit
Arrear Task Type	Read, Edit

Record Type Assignments

Assign these Record Types to a Permission Set/Profile:

- Account - Household
- Contact - Tenant
- Opportunity - Account Receivable

Apex Classes Access

- CreateTenancyComponentController
- TerminateTenancyController

Set Up Page Layouts

Set up page layouts for Households, Tenants and Account Receivables so users can see information related to Housing Management.

Household Page Layout

Go to Setup -> Object Manager -> Account -> Page Layouts -> Click the 'Page Layout Assignment' button.

SETUP > OBJECT MANAGER
Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Page Layouts
5 Items, Sorted by Page Layout Name

Quick Find New **Page Layout Assignment**

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account (Marketing) Layout	Andrei Kukharchuk, 15/02/2022, 12:12	Andrei Kukharchuk, 17/05/2022, 15:24
Account (Sales) Layout	Andrei Kukharchuk, 15/02/2022, 12:12	Andrei Kukharchuk, 17/05/2022, 15:24
Account (Support) Layout	Andrei Kukharchuk, 15/02/2022, 12:12	Andrei Kukharchuk, 17/05/2022, 15:24
Account Layout	Andrei Kukharchuk, 15/02/2022, 12:12	Andrei Kukharchuk, 17/05/2022, 15:24
Household Layout	Andrei Kukharchuk, 20/04/2022, 13:45	Andrei Kukharchuk, 17/05/2022, 16:56

Then click the 'Edit Assignment' button.

SETUP > OBJECT MANAGER
Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce

Page Layout Assignment
Account

The table below shows the page layout assignments for different record type and profile combinations.

Edit Assignment

Profiles	Record Types	
	Master	Household
Analytics Cloud Integration User	Account Layout	Account Layout
Analytics Cloud Security User	Account Layout	Account Layout
Authenticated Website	Account Layout	Account Layout
Authenticated Website	Account Layout	Account Layout
Chatter External User	Account Layout	Account Layout
Chatter Free User	Account Layout	Account Layout
Chatter Moderator User	Account Layout	Account Layout
Contract Manager	Account Layout	Account Layout
Cross Org Data Proxy User	Account Layout	Account Layout
Custom: Marketing Profile	Account (Marketing) Layout	Account Layout
Custom: Sales Profile	Account (Sales) Layout	Account Layout
Custom: Support Profile	Account (Support) Layout	Account Layout
Customer Community Login User	Account Layout	Account Layout
Customer Community Plus Login User	Account Layout	Account Layout

Under the 'Household' record type, select the profiles that will use the AC Housing app and set the 'Household Layout' page layout for those profiles.

Profiles	master	household
Customer Community Plus User	Account Layout	Account Layout
Customer Community User	Account Layout	Account Layout
Customer Portal Manager Custom	Account Layout	Account Layout
Customer Portal Manager Standard	Account Layout	Account Layout
External Apps Login User	Account Layout	Account Layout
External Identity User	Account Layout	Account Layout
Force.com - App Subscription User	Account Layout	Account Layout
Force.com - Free User	Account Layout	Account Layout
Gold Partner User	Account Layout	Account Layout
High Volume Customer Portal	Account Layout	Account Layout
High Volume Customer Portal User	Account Layout	Account Layout
Identity User	Account Layout	Account Layout
Marketing User	Account Layout	Account Layout
Minimum Access - Salesforce	Not Assigned	Account Layout
Partner App Subscription User	Account Layout	Account Layout
Partner Community Login User	Account Layout	Account Layout
Partner Community User	Account Layout	Account Layout
Read Only	Account Layout	Account Layout
Silver Partner User	Account Layout	Account Layout
Solution Manager	Account Layout	Account Layout
Standard Platform User	Account Layout	Account Layout
Standard User	Account Layout	Account Layout
System Administrator	Account Layout	Household Layout

Tenant Page Layout

Go to Setup -> Object Manager -> Contact -> Page Layouts -> Click the 'Page Layout Assignment' button.

SETUP > OBJECT MANAGER

Contact

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Page Layouts
5 Items, Sorted by Page Layout Name

Quick Find

New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Contact (Marketing) Layout	Andrei Kukharchuk, 15/02/2022, 12:12	Andrei Kukharchuk, 17/05/2022, 17:50
Contact (Sales) Layout	Andrei Kukharchuk, 15/02/2022, 12:12	Andrei Kukharchuk, 17/05/2022, 17:50
Contact (Support) Layout	Andrei Kukharchuk, 15/02/2022, 12:12	Andrei Kukharchuk, 17/05/2022, 17:50
Contact Layout	Andrei Kukharchuk, 15/02/2022, 12:12	Andrei Kukharchuk, 17/05/2022, 17:50
Tenant Layout	Andrei Kukharchuk, 20/04/2022, 14:10	Andrei Kukharchuk, 16/05/2022, 09:48

Then click the 'Edit Assignment' button.

Contact

The table below shows the page layout assignments for different record type and profile combinations.

Edit Assignment		
Profiles	Record Types	
	Master	Tenant
Analytics Cloud Integration User	Contact Layout	Contact Layout
Analytics Cloud Security User	Contact Layout	Contact Layout
Authenticated Website	Contact Layout	Contact Layout
Authenticated Website	Contact Layout	Contact Layout
Chatter External User	Contact Layout	Contact Layout
Chatter Free User	Contact Layout	Contact Layout
Chatter Moderator User	Contact Layout	Contact Layout
Contract Manager	Contact Layout	Contact Layout
Cross Org Data Proxy User	Contact Layout	Contact Layout
Custom: Marketing Profile	Contact (Marketing) Layout	Contact Layout
Custom: Sales Profile	Contact (Sales) Layout	Contact Layout
Custom: Support Profile	Contact (Support) Layout	Contact Layout

Under the 'Tenant' record type, select the profiles that will use the AC Housing app and set the 'Tenant Layout' page layout for those profiles.

Profiles	Master	Tenant
Customer Community Plus User	Contact Layout	Contact Layout
Customer Community User	Contact Layout	Contact Layout
Customer Portal Manager Custom	Contact Layout	Contact Layout
Customer Portal Manager Standard	Contact Layout	Contact Layout
External Apps Login User	Contact Layout	Contact Layout
External Identity User	Contact Layout	Contact Layout
Force.com - App Subscription User	Contact Layout	Contact Layout
Force.com - Free User	Contact Layout	Contact Layout
Gold Partner User	Contact Layout	Contact Layout
High Volume Customer Portal	Contact Layout	Contact Layout
High Volume Customer Portal User	Contact Layout	Contact Layout
Identity User	Contact Layout	Contact Layout
Marketing User	Contact Layout	Contact Layout
Minimum Access - Salesforce	Not Assigned	Contact Layout
Partner App Subscription User	Contact Layout	Contact Layout
Partner Community Login User	Contact Layout	Contact Layout
Partner Community User	Contact Layout	Contact Layout
Read Only	Contact Layout	Contact Layout
Silver Partner User	Contact Layout	Contact Layout
Solution Manager	Contact Layout	Contact Layout
Standard Platform User	Contact Layout	Contact Layout
Standard User	Contact Layout	Contact Layout
System Administrator	Contact Layout	Tenant Layout

Account Receivable Page Layout

Go to Setup -> Object Manager -> Opportunities -> Page Layouts -> Click the 'Page Layout Assignment' button.

SETUP > OBJECT MANAGER
Opportunity

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Page Layouts
5 Items, Sorted by Page Layout Name

Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account Receivable Layout	Andrei Kukharchuk, 20/04/2022, 14:07	Andrei Kukharchuk, 17/05/2022, 16:59
Opportunity (Marketing) Layout	Andrei Kukharchuk, 15/02/2022, 12:12	Andrei Kukharchuk, 15/02/2022, 12:12
Opportunity (Sales) Layout	Andrei Kukharchuk, 15/02/2022, 12:12	Andrei Kukharchuk, 15/02/2022, 12:12
Opportunity (Support) Layout	Andrei Kukharchuk, 15/02/2022, 12:12	Andrei Kukharchuk, 15/02/2022, 12:12
Opportunity Layout	Andrei Kukharchuk, 15/02/2022, 12:12	Andrei Kukharchuk, 22/04/2022, 12:47

Then click the 'Edit Assignment' button.

Page Layout Assignment

Opportunity

The table below shows the page layout assignments for different record type and profile combinations.

Edit Assignment

Profiles	Record Types	
	Master	Account Receivable
Analytics Cloud Integration User	Opportunity Layout	Opportunity Layout
Analytics Cloud Security User	Opportunity Layout	Opportunity Layout
Authenticated Website	Opportunity Layout	Opportunity Layout
Authenticated Website	Opportunity Layout	Opportunity Layout
Chatter External User	Opportunity Layout	Opportunity Layout
Chatter Free User	Opportunity Layout	Opportunity Layout
Chatter Moderator User	Opportunity Layout	Opportunity Layout
Contract Manager	Opportunity Layout	Opportunity Layout
Gross Org Data Proxy User	Opportunity Layout	Opportunity Layout
Custom: Marketing Profile	Opportunity (Marketing) Layout	Opportunity Layout
Custom: Sales Profile	Opportunity (Sales) Layout	Opportunity Layout
Custom: Support Profile	Opportunity (Support) Layout	Opportunity Layout
Customer Community Login User	Opportunity Layout	Opportunity Layout

Under the 'Account Receivable' record type, select the profiles that will use the AC Housing app and set the 'Account Receivable Layout' page layout for those profiles.

Profiles	master	Account Receivable
Customer Community Plus User	Opportunity Layout	Opportunity Layout
Customer Community User	Opportunity Layout	Opportunity Layout
Customer Portal Manager Custom	Opportunity Layout	Opportunity Layout
Customer Portal Manager Standard	Opportunity Layout	Opportunity Layout
External Apps Login User	Opportunity Layout	Opportunity Layout
External Identity User	Opportunity Layout	Opportunity Layout
Force.com - App Subscription User	Opportunity Layout	Opportunity Layout
Force.com - Free User	Opportunity Layout	Opportunity Layout
Gold Partner User	Opportunity Layout	Opportunity Layout
High Volume Customer Portal	Opportunity Layout	Opportunity Layout
High Volume Customer Portal User	Opportunity Layout	Opportunity Layout
Identity User	Opportunity Layout	Opportunity Layout
Marketing User	Opportunity Layout	Opportunity Layout
Minimum Access - Salesforce	Not Assigned	Opportunity Layout
Partner App Subscription User	Opportunity Layout	Opportunity Layout
Partner Community Login User	Opportunity Layout	Opportunity Layout
Partner Community User	Opportunity Layout	Opportunity Layout
Read Only	Opportunity Layout	Opportunity Layout
Silver Partner User	Opportunity Layout	Opportunity Layout
Solution Manager	Opportunity Layout	Opportunity Layout
Standard Platform User	Opportunity Layout	Opportunity Layout
Standard User	Opportunity Layout	Opportunity Layout
System Administrator	Opportunity Layout	Account Receivable Layout

Configurations for Personal Account

Some metadata for person accounts is not included in the package (such as page layout and record type) due to possible installation issues in orgs with disabled person accounts. Therefore, these steps are manual but will enhance your user experience.

Note: If you don't use person accounts in your org, or you don't know what they are, you can skip this section.

Create Page Layout

Go to Setup -> Object Manager -> Person Account -> Page Layouts -> New -> Enter a name, for example Household Layout -> Save.

Set it up as shown in the picture below. You can add/remove some element, it's just a template in the picture.

Highlights Panel

Customize the highlights panel for this page layout.

Quick Actions in the Salesforce Classic Publisher



Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience

Actions

[Edit](#)[Delete](#)[Change Record Type](#)

Person Account Detail

Standard Buttons

[Edit](#)[Change Owner](#)[Send Survey](#)[Delete](#)[Start Conversation](#)

Custom Buttons

Account Information (Header visible on edit only)

Account Owner: [Sample Text](#)
★ Account Name: Sample Text
Account Record Type: Sample Text
Title: Sample Text
Birthdate: 28/03/2023
Home Phone: 1-415-555-1212
Mobile: 1-415-555-1212
Email: sarah.sample@company.com

Tenant Proposed Rent €123.45

Address Information (Header visible on edit only)

Mailing Address: Suite 300, The Landmark @ One Market
San Francisco
CA 94105
US

Additional Information (Header visible on edit only)

System Information (Header visible on edit only)

Created By: [Sample Text](#)

Last Modified By: [Sample Text](#)

Description Information (Header visible on edit only)

Custom Links (Header not visible)

Income

Employment Income	€123.45	Domiciliary Care Of Disabled Children	€123.45
Social Insurance	€123.46	Allowances Paid For Fostering Children	€123.46
Living Alone Allowance	€123.45	Charitable Organizations	€123.45
Full Rate Carer's Allowance	€123.45	Child Benefit	€123.45
Health Board / Welfare	€123.45	Child Maintenance	€123.45
FAS Training Allowances	€123.45	Christmas Bonus Payments	€123.45
CE Schemes, Back To Work, VEC Schemes	€123.45	CE/Training Fuel & Travel	€123.46
Pension/Other Sources	€123.45	Half-Rate Carer	€123.45
Working Family Payment	€123.46	Health Board Medical / Dietary	€123.46
Spouse/Partner Maintenance	€123.45	Scholarships And Educational Grants	€123.45
Income From Overtime Worked	€123.45	Social Welfare Fuel Allowance	€123.45
Blank Space		Blank Space	
Blank Space		Assessable Income	€123.45

Mobile Cards (Salesforce mobile only)

Twitter

Related Lists

Opportunities

New

Opportunity Name	Stage	Amount	Close Date
Sample Text	Sample Text	€123.45	28/03/2023

Tenancies

New

Tenancy Name	Property Type	Rent Amount	Start Date	End Date
Sample Text	Sample Text	€123.45	28/03/2023	28/03/2023

Housing Benefits

New

Housing Benefit Name	Property Type	Amount	Start Date	End Date
Sample Text	Sample Text	€123.45	28/03/2023	28/03/2023

Here is what it looks like:

AC Housing New Person Account

Account Owner: Admin User

Tenant Proposed Rent: €10.00

Account Name: New Person Account

Account Record Type: Household (Person Account)

Title:

Birthdate:

Home Phone:

Mobile:

Email:

Mailing Address:

Created By: Admin User, 28/03/2023, 11:22

Last Modified By: Admin User, 28/03/2023, 11:22

Income

Income Source	Amount
Employment Income	€0.00
Domiliary Care Of Disabled Children	€0.00
Social Insurance	€0.00
Allowances Paid For Fostering Children	€0.00
Living Alone Allowance	€0.00
Charitable Organizations	€0.00
Full Rate Carer's Allowance	€0.00
Child Benefit	€0.00
Health Board / Welfare	€0.00
Child Maintenance	€0.00
FAS Training Allowances	€0.00
Christmas Bonus Payments	€0.00
CE Schemes, Back To Work, VEC Schemes	€0.00
CL/Training Fuel & Travel	€0.00
Pension/Other Sources	€0.00
Half-rate Carer	€0.00
Working Family Payment	€0.00
Health Board Medical / Dietary	€0.00
Spouse/Partner Maintenance	€0.00
Scholarships And Educational Grants	€0.00
Income From Overtime Worked	€0.00
Social Welfare Fuel Allowance	€0.00

Assessable income: €0.00

Tenancies (1)

Tenancy Name	Property Type	Rent Amount	Start Date	End Date
T-202303-11	Dwelling	€1,500.00	3/4/2023	

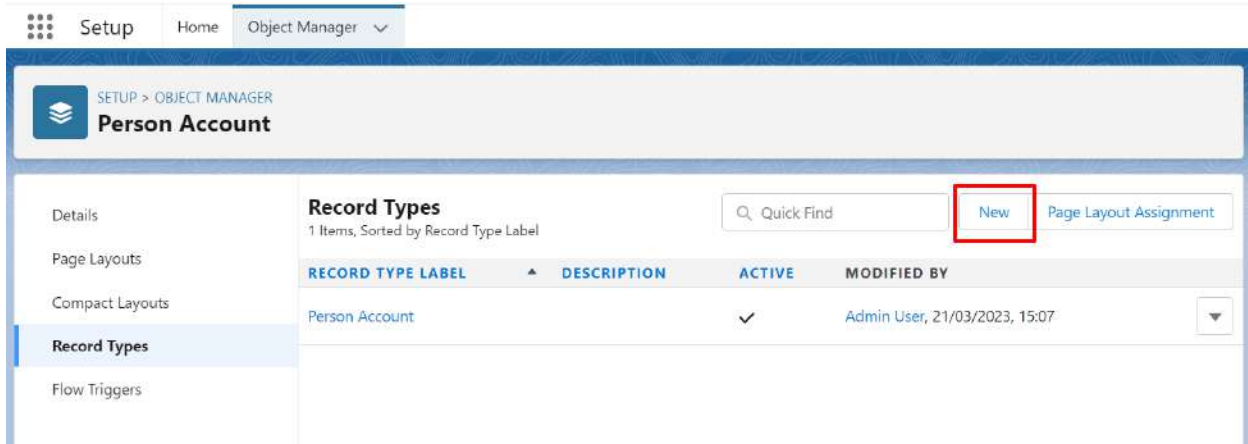
Housing Benefits (1)

Housing Benefit Name	Property Type	Amount	Start Date	End Date
HB-45	Dwelling	€45.00	21/3/2023	15/6/2023

Create Record Type

If you have other logic for your person account besides using them with the AC Housing, consider creating a record type to separate them.

To do this, go to Setup -> Object Manager -> Person Account -> Record Types -> New.



Enter a name, for example Household (Person Account), mark it as active, and make it available to profiles that will use the AC Housing app. Click the 'Next' button.

New Record Type Help for this Page

Person Account

Step 1. Enter the details Step 1 of 2

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type ! = Required Information

Existing Record Type: Person Account

Record Type Label: Household (Person Account)

Record Type Name: Household_Person_Account

Description:

Active: ☒

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	☐ Make Available	☐ Make Default
System Administrator		☒	☐

Apply the page layout created in the previous step and click the 'Save' button.

Step 2. Assign page layouts

Person Account Record Type
Household (Person Account)

Record Type Name
Household_Person_Account

Description

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

☒ Apply one layout to all profiles
Household Layout

☐ Apply a different layout for each profile

Click 'Edit' next to the Type picklist. There are two 'Type' picklists, select one with the following values: Principal Tenant, Subsidiary Tenant.

Record Type
Household (Person Account)

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values.

Edit

Record Type Label
Household (Person Account)

Record Type Name
Household_Person_Account

Namespace Prefix

Description

Created By
Admin User, 28/03/2023, 11:14

Picklists Available for Editing

Action	Field
Edit	Salutation
Edit	Account Source, Lead Source
Edit	Active
Edit	Customer Priority
Edit	Gender Identity
Edit	Industry
Edit	Level
Edit	Ownership
Edit	Pronouns
Edit	Rating
Edit	SLA
Edit	Type
Edit	Type
Edit	Upsell Opportunity

Remove 'Subsidiary Tenant' from 'Selected Values' and make 'Principal Tenant' the default value. Click the 'Save' button.

Type

General Properties	
Field Label	Type
Record Type	Household (Person Account)

Picklist Values

Select an item from the Available Values list and add it to the Selected Values list to Type.

Available Values

Subsidiary Tenant

Selected Values

Principal Tenant

Add

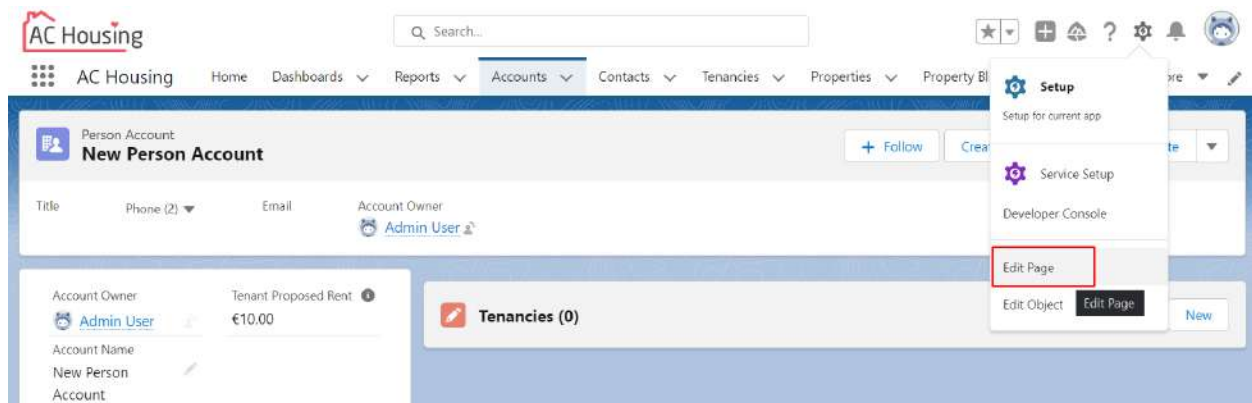
Remove

Default

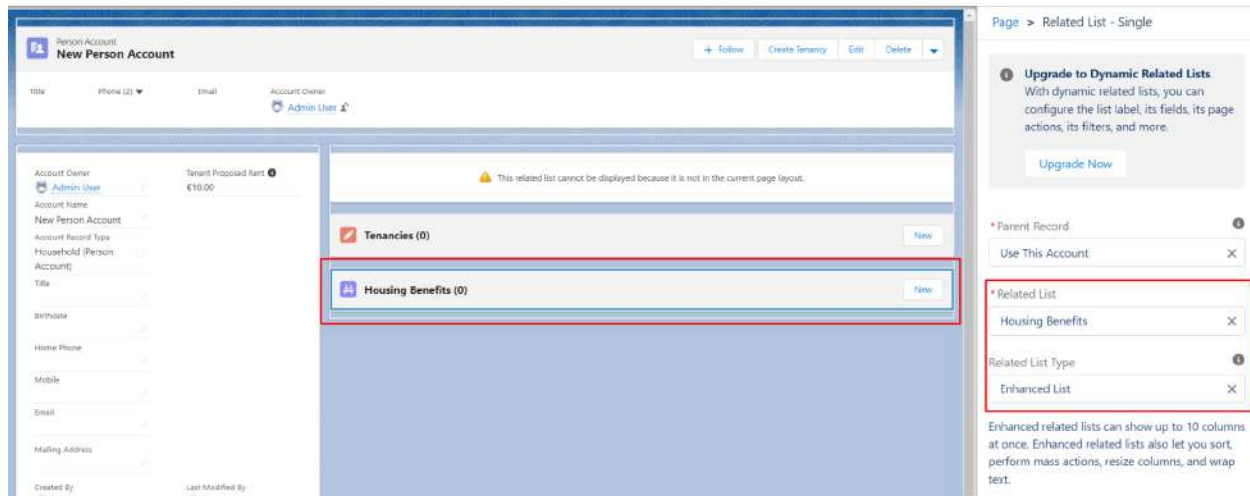
Principal Tenant

Update Account Page for AC Housing App

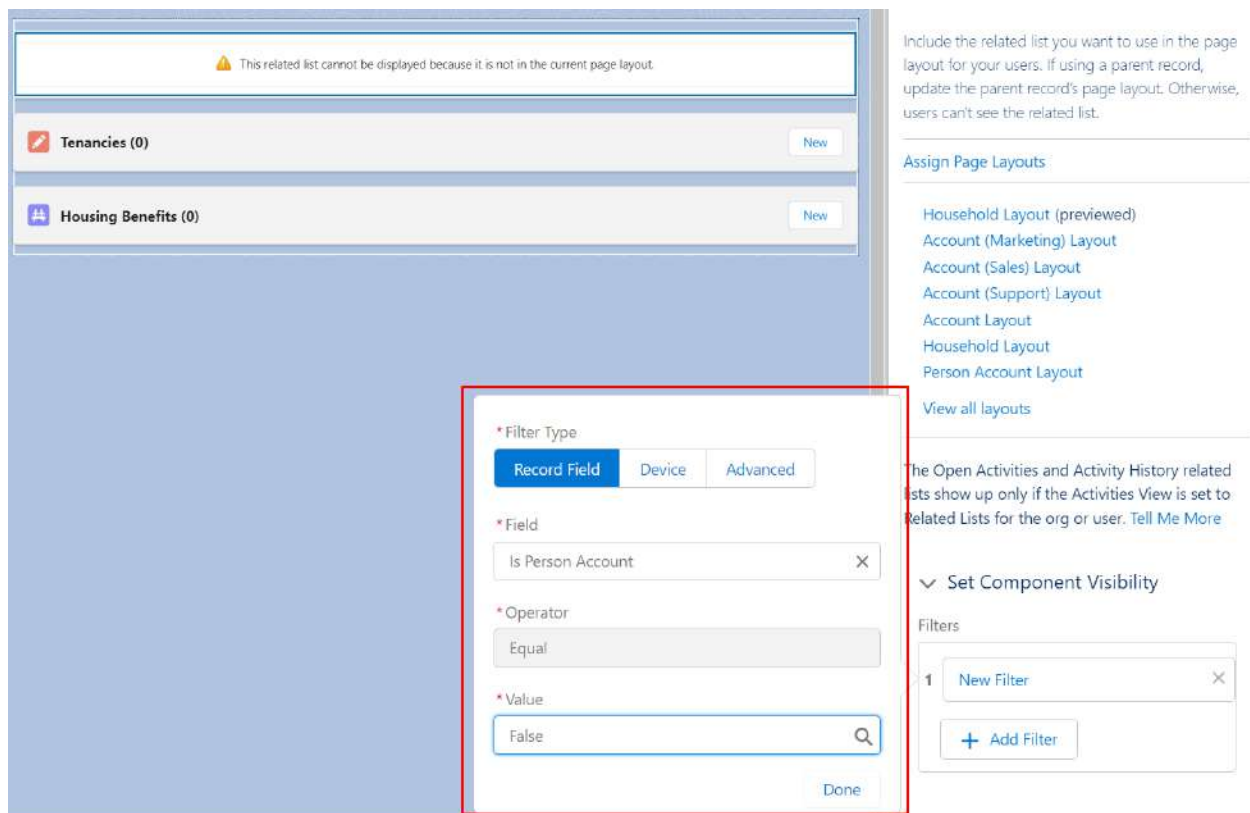
Go to the AC Housing app -> Open account page -> Click the 'Setup' icon -> Click 'Edit Page'.



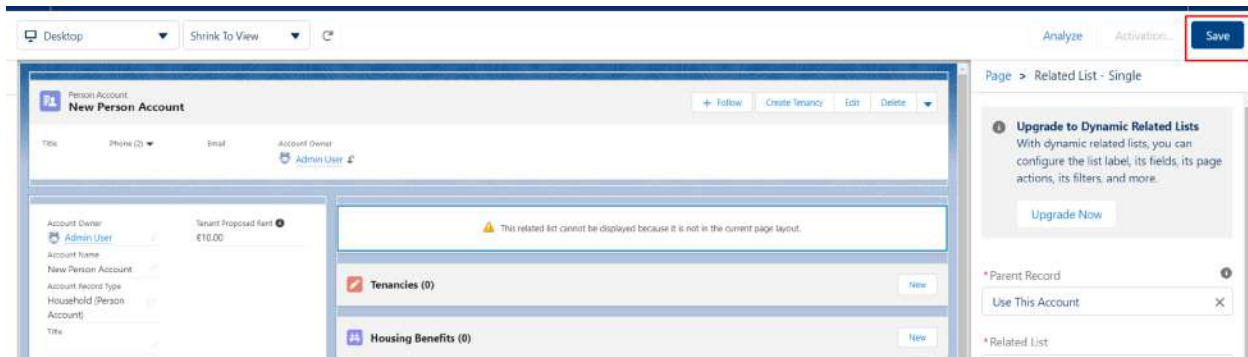
Move the 'Related List - Single' component to the main region below the 'Tenancy' related list. In the 'Related List' select 'Housing Benefits'. In the 'Related List Type' select 'Enhanced List'.



Select the first related list in the main region that displays contacts. In the component settings, scroll down and click the '+ Add Filter' button. In the 'Field' select 'Is Person Account'. In the 'Value' select 'False'. Click the 'Done' button.



Then click the 'Save' button.



Click the 'Active' button. Select the 'App Default' tab. Click the 'Assign as App Default' button.



Mark the AC Housing app -> Next -> Desktop and phone -> Next - Save.

Update 'Household' List View

Go to AC Housing app -> Open the 'Account' tab -> Select the 'Household' list view -> Click the 'Show Filters' icon -> For 'Account Record Type', add the value of the record type created in the previous steps -> Click the 'Done' button -> Click the 'Save' button.

Accounts

Households

New

Import

Printable View

10 items • Sorted by Account Name • Filtered by All accounts - Account Record Type • Updated 4 minutes ago

Search this list...

	Account Name ↑	Phone
1	☐ Alvazer's Household	
2	☐ Black's Household	
3	☐ Bock's Household	
4	☐ Cooper's Household	
5	☐ Gregory's Household	
6	☐ Holly's Household	
7	☐ James's Household	
8	☐ William's Household	
9	☐ Wong's Household	
10	☐ Young's Household	

Field

Account Record Type

Operator

equals

☒ Household
 ☒ Household (Person Account)
 ☐ Person Account

Done

Filters

Filter by Owner

All accounts

Matching all of these filters

Account Record Type equals Household

×

Add Filter

Remove All

Add Filter Logic

Housing Management Settings

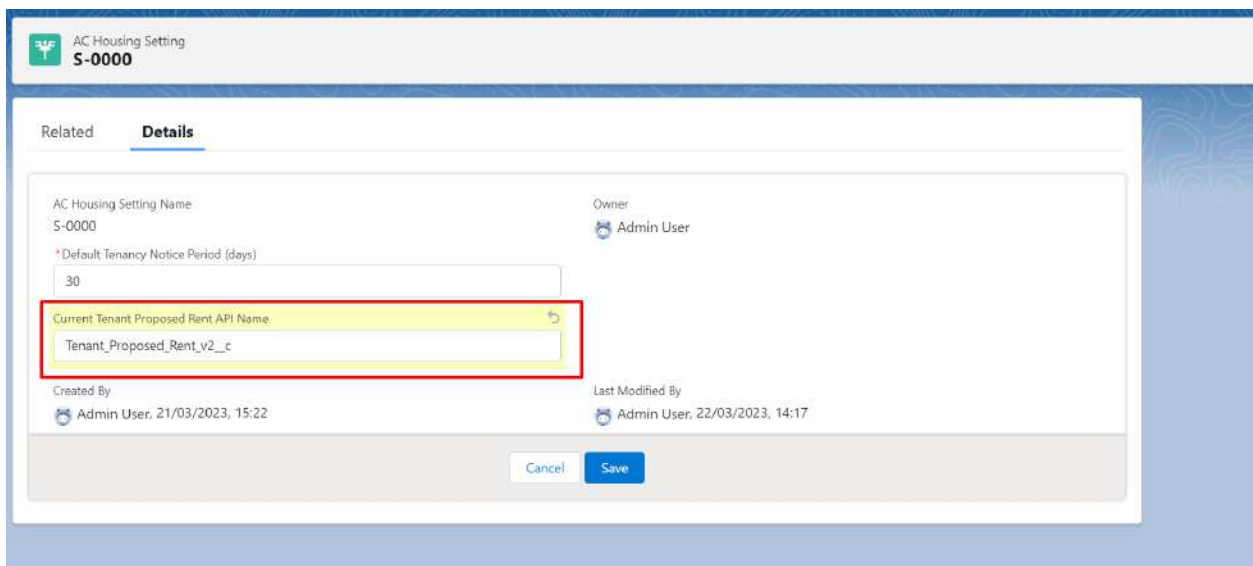
Custom Formula for Tenant Proposed Rent

If you want to change the Tenant Proposed Rent formula, the administrator should create a new formula field with required logic of tenant proposed rent calculation.

To do this, go to Setup -> Object Manager -> Contact -> Fields & Relationships -> Click the 'New' button -> Select 'Formula' and click the 'Next' button -> Enter your preferred field name and select 'Currency' as the Formula Return Type, then click the 'Next' button -> Enter the formula according to the required logic, and then click the 'Next' button -> Establish field-level security and click the 'Next' button -> Add to page layouts if needed and click the 'Save' button.

The administrator then should set the API Name of the newly created field to the Current Tenant Proposed Rent API Name field in AC Housing Setting record.

To do this, go to AC Housing app -> AC Housing Settings -> Open an existing record or create a new one if there is none -> Fill in the Current Tenant Proposed Rent API Name field with the API Name of the newly created formula field -> Click the 'Save' button.



The screenshot shows the 'AC Housing Setting' record in Salesforce. The record ID is 'S-0000'. The 'Details' tab is selected. The 'Current Tenant Proposed Rent API Name' field is highlighted with a red box and contains the value 'Tenant_Proposed_Rent_v2__c'. Other fields visible include 'Default Tenancy Notice Period (days)' with a value of '30', 'Created By' (Admin User, 21/03/2023, 15:22), and 'Last Modified By' (Admin User, 22/03/2023, 14:17). The 'Owner' is 'Admin User'. At the bottom, there are 'Cancel' and 'Save' buttons.

After you update the AC Housing Setting record, the Sum Of Tenants Proposed Rents and Household Proposed Rent fields will use the value from your new formula field instead of the Tenant Proposed Rent field provided by the package.

Path

The path is a useful indicator of the progress of voids, arrears and account receivables.



First of all, you need to enable paths in your org. If they are disabled, follow these steps to enable:

Navigate to Setup, then type 'Path' in the Quick Find Box. This will show the Path Settings. After selecting the Path Setting, select 'Enable'.

After that, you will see the paths used in your org. You can also modify them on this page.

SETUP Path Settings

When you activate your path, Kanban also shows key fields and guidance for views based on the same object, record type, and picklist.

New Path

Path Name	Active	Object	Record Type	Action
Arrear Path	☒	Arrear	--Master--	Delete Edit Deactivate
Account Receivable Path	☒	Opportunity	--Master--	Delete Edit Deactivate
Path For Void	☒	Void	--Master--	Delete Edit Deactivate

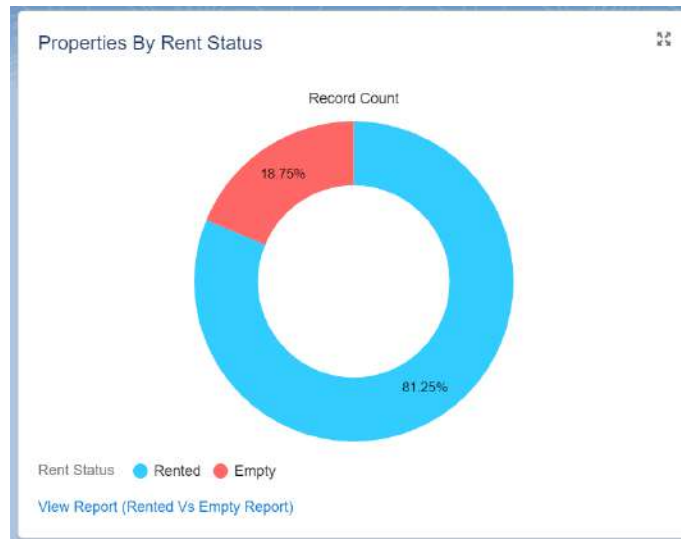
[Disable Path](#)

Change Colors in Dashboard

Change Color of Displayed Custom Field

To change the colors of the dashboard components that display data based on custom field values, follow the steps below.

The example of such a component:



Open the object whose color you want to change. For example, if you want to change the color for the Arrear object, go to Setup -> Object Manager -> Arrear.

Setup	Home	Object Manager
Object Manager 51+ Items, Sorted by Label		
Appointment Bundle Policy Service Territory	ApptBundlePolicySvcTerr	Standard Object
Appointment Bundle Propagation Policy	ApptBundlePropagatePolicy	Standard Object
Appointment Bundle Restriction Policy	ApptBundleRestrictPolicy	Standard Object
Appointment Bundle Sort Policy	ApptBundleSortPolicy	Standard Object
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object
Arrear	ac_housing__Arrear__c	Custom Object
Arrear Task	ac_housing__Arrear_Task__c	Custom Object
Arrear Workflow	ac_housing__Arrear_Workflow__c	Custom Object

Choose the field whose color you want to change in the dashboard: Fields & Relationships -> Current Milestone

Setup Home Object Manager

SETUP > OBJECT MANAGER
Arrear

Details

Fields & Relationships 12 Items, Sorted by Field Label [New](#) [Deleted Fields](#) [Field Dependencies](#) [Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	ac_housing__Amount__c	Currency(16, 2)		
Arrear Name	Name	Auto Number		✓
Arrear Workflow	ac_housing__Arrear_Workflow__c	Lookup(Arrear Workflow)		✓
Created By	CreatedById	Lookup(User)		
Current Milestone	ac_housing__Current_Milestone__c	Picklist		
End Date	ac_housing__End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		

Then click the 'View Arrears Milestone Value Set' button.

SETUP > OBJECT MANAGER
Arrear

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

Values [View Arrear Milestone Value Set](#) [Values Help](#)

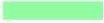
Values	API Name	Default	Chart Colors	Modified By
1 week	1 week	☐		Andrei Kukharchuk, 24/05/2022, 15:26
2 weeks	2 weeks	☐		Andrei Kukharchuk, 24/05/2022, 15:24
3 weeks	3 weeks	☐		Andrei Kukharchuk, 24/05/2022, 15:24
4 weeks	4 weeks	☐		Andrei Kukharchuk, 24/05/2022, 15:24
Pre-Court	Pre-Court	☐		Andrei Kukharchuk, 24/05/2022, 15:24
Court SPO	Court_SPO	☐		Andrei Kukharchuk, 24/05/2022, 15:25
Eviction	Eviction	☐		Andrei Kukharchuk, 24/05/2022, 15:26
Closed	Closed	☐		Andrei Kukharchuk, 24/05/2022, 15:25

Inactive Values [View Arrear Milestone Value Set](#)

Values	API Name	Modified By
--------	----------	-------------

Then click 'Edit' next to the value you want to change color of.

[Edit](#) | [Delete](#)

Values					
New Reorder Replace Printable View Chart Colors					
Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	1 week	1 week	☐		Andrei Kukharchuk , 24/05/2022, 15:26
Edit Del Deactivate	2 weeks	2 weeks	☐		Andrei Kukharchuk , 24/05/2022, 15:24
Edit Del Deactivate	3 weeks	3 weeks	☐		Andrei Kukharchuk , 24/05/2022, 15:24
Edit Del Deactivate	4 weeks	4 weeks	☐		Andrei Kukharchuk , 24/05/2022, 15:24
Edit Del Deactivate	Pre-Court	Pre-Court	☐		Andrei Kukharchuk , 24/05/2022, 15:24
Edit Del Deactivate	Court SPO	Court_SPO	☐		Andrei Kukharchuk , 24/05/2022, 15:25
Edit Del Deactivate	Eviction	Eviction	☐		Andrei Kukharchuk , 24/05/2022, 15:26
Edit Del Deactivate	Closed	Closed	☐		Andrei Kukharchuk , 24/05/2022, 15:25

Inactive Values

Choose a color and save your changes. You can repeat this for all other values.

Picklist Value Sets
Picklist Edit

Arrear Milestone

Enter a name for the picklist value below. Check the box to use this value as the default value.

Label

API Name

Default ☐ Make this value the default for the master picklist

Chart Color


[Assign color dynamically](#)

Select a Color
[xn-ac-pmccom-dev-ed.my.salesfo...](#)

Basic

Chart

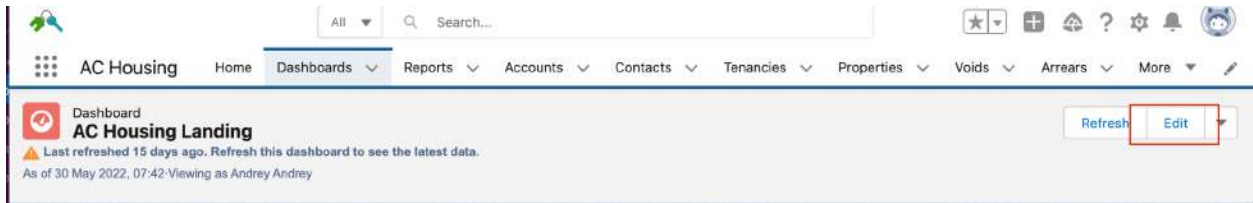
[Save](#)
[Cancel](#)

Change Color of Displayed Information

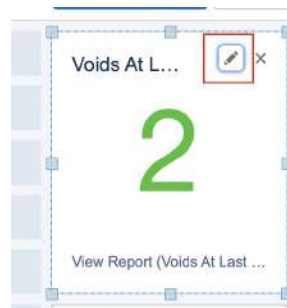
You can also change the color directly in the dashboard. To do this, you need to open the desired dashboard and click the 'Edit' button.

31

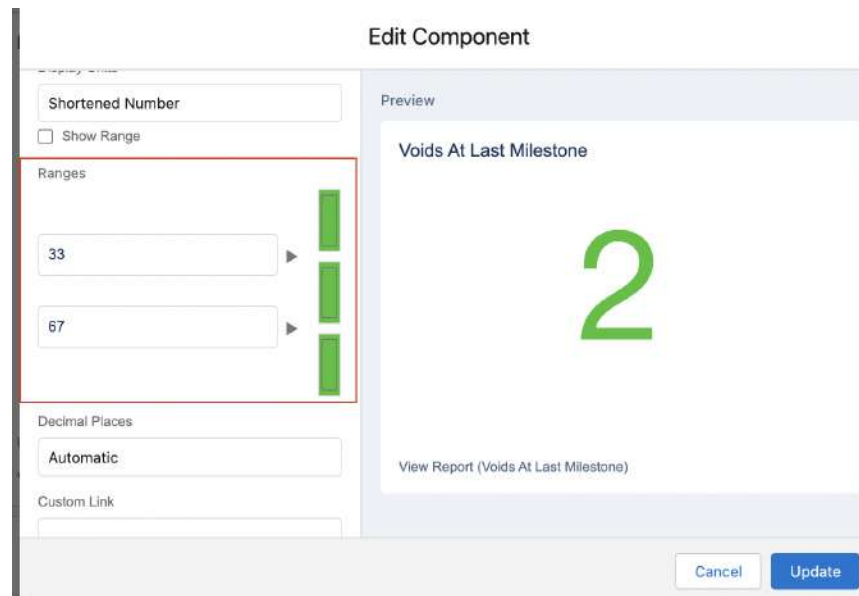
Advanced Communities Ltd. registered in England and Wales (No. 6659236) VAT No. 115662818
 We Work 30 Churchill Place, Canary Wharf, London E14 5RE United Kingdom
 We Work SOMA, 156 2nd Street, San Francisco, CA 94105 USA
 sales@advancedcommunities.com +44 20 3051 0075



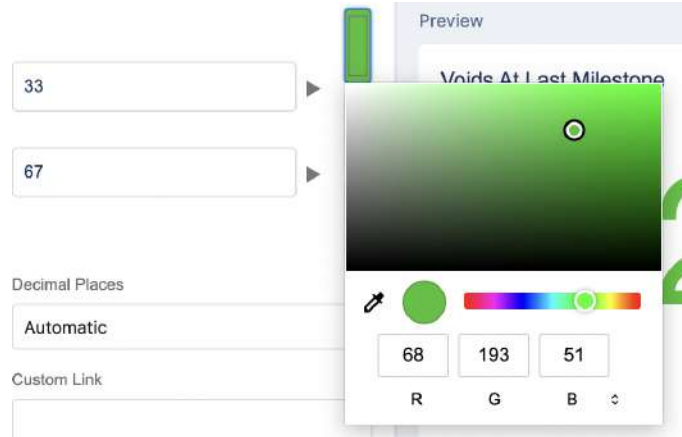
Then, next to the component whose colors you want to change, click on the pencil icon.



Find the ranges section.



Click on the color and you can choose the color that will be displayed for that dashboard component when the value is in the selected range.

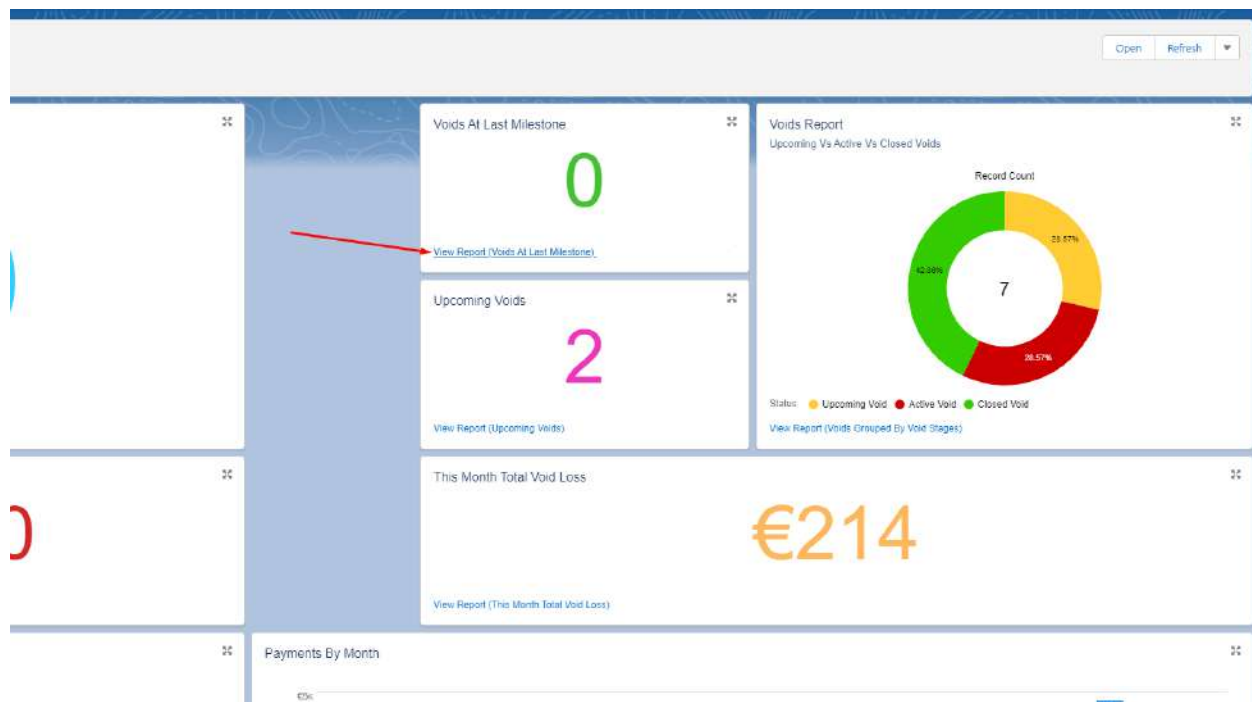


Update 'Voids At Last Milestone' Dashboard Component

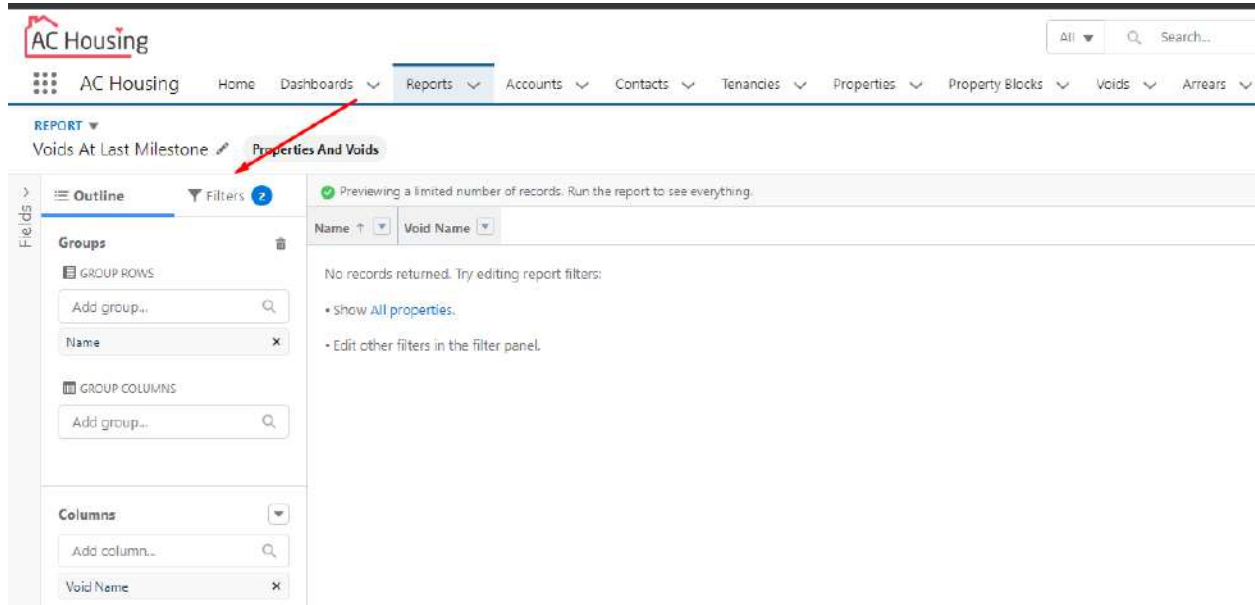
If you have updated the 'Void Milestone' Global Value Set since installing the package, you will need to update the 'Voids At Last Milestone' dashboard component to display up-to-date data.

If the last milestone is still 'Letting Actions', you can skip this section, otherwise follow the steps below.

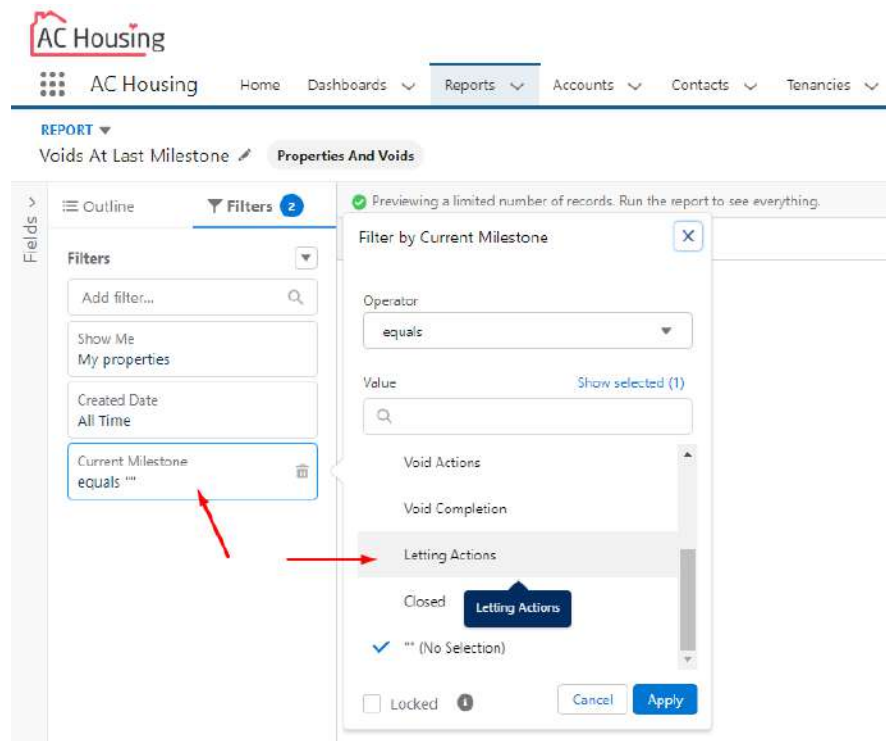
Go to the dashboard and click 'View Report (Voids At Last Milestone)'.



Then open filters.

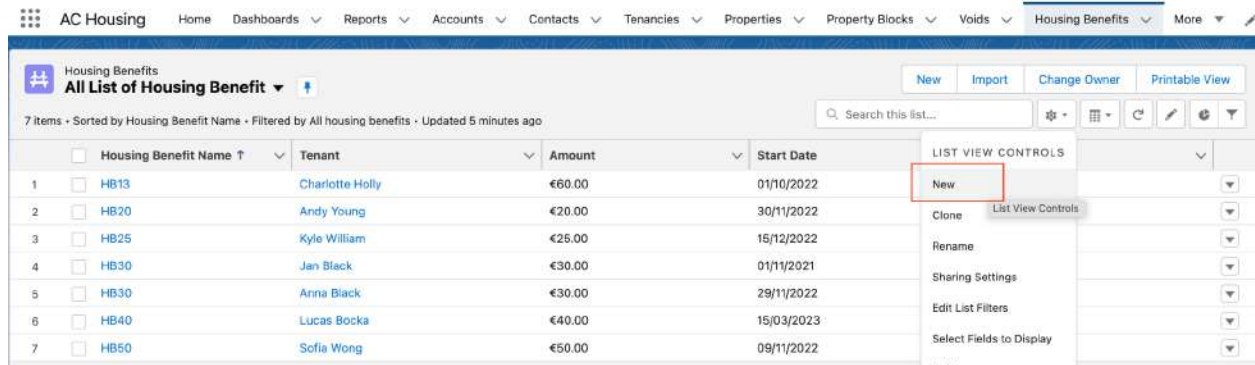


Click 'Current Milestone' -> Select the milestone that should be the last -> Deselect all other selected milestones if any -> Click the 'Apply' button.

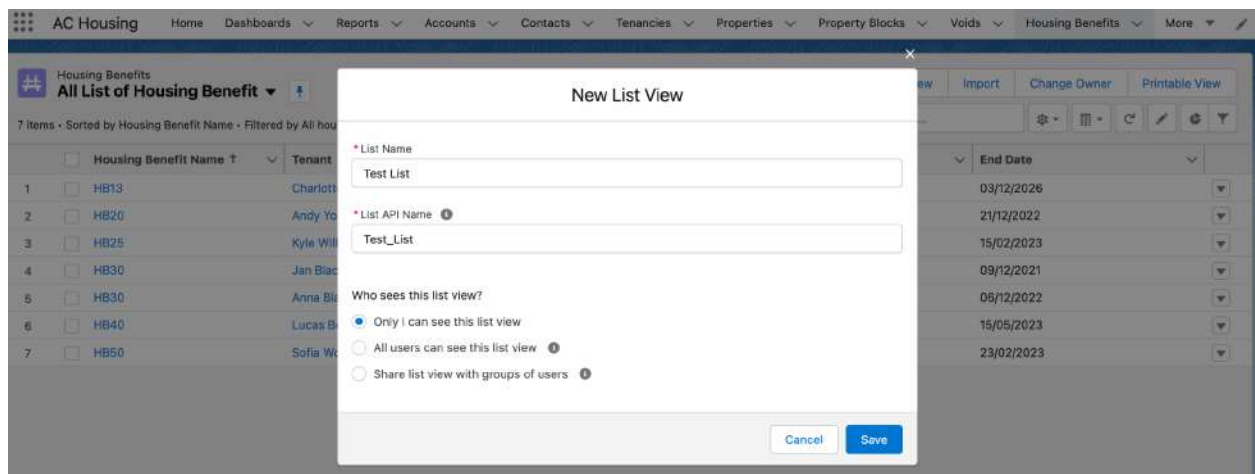


Create Your Own Custom List Views

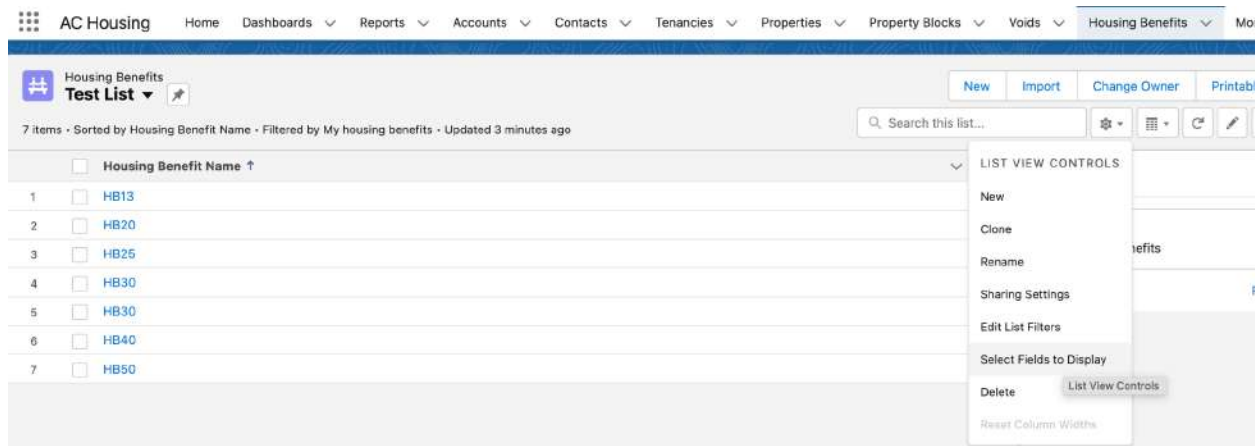
Go to AC Housing app -> Open the tab for which object you want to create a list view -> Open the 'List View Controls' and click 'New'.



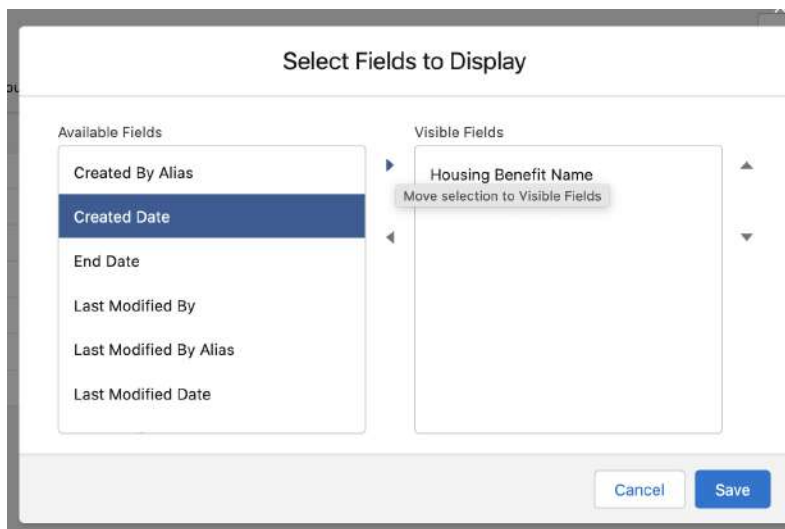
Enter a list name and click 'Save'.



Once created, you can add fields to display. Open the 'List View Controls' and click 'Select Fields To Display'.



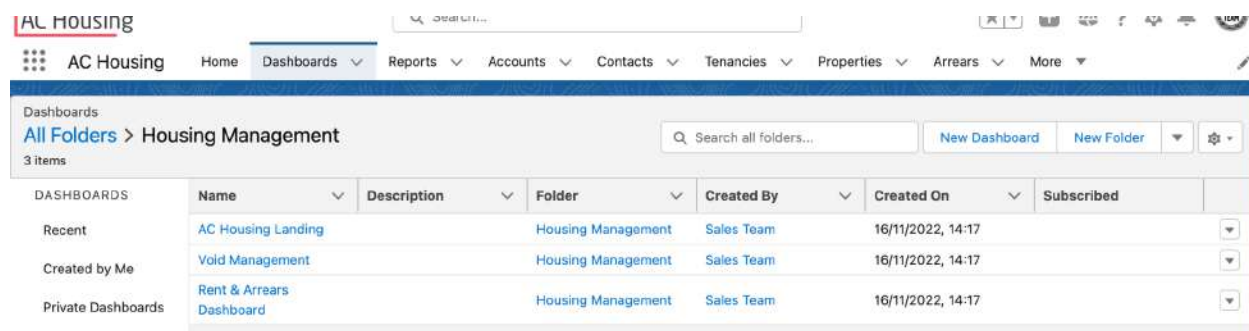
Choose the required fields and click the arrow icon to move it to the right column. After selecting all the fields, click on the 'Save' button.



Using AC Housing

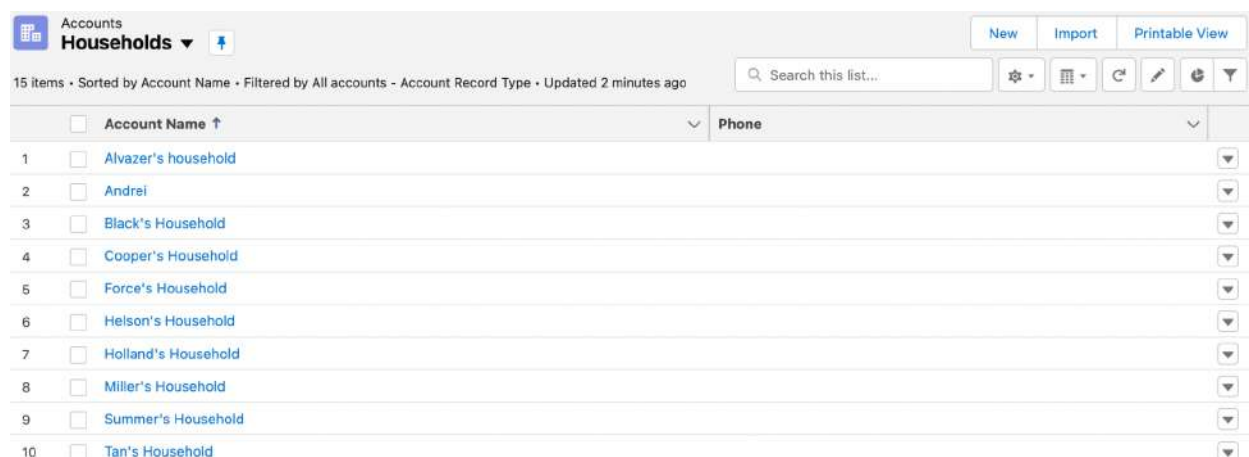
Dashboards

Dashboards help you visually understand your current status. They group different types of reports and you can find them by going to the AC Housing app -> Dashboards -> All Folders -> Housing Management.



Households and Tenants

To get started, create accounts with the record type 'Household' and then create contacts with the record type 'Tenant' related to these accounts.



One account can have many contacts. At least one contact should have the 'Principal Tenant' type in order to create a tenancy for an account. Only one active tenancy per property type is allowed per account.

Account

Holland's Household

+ Follow

Create Tenancy

Edit

Delete

Type

Phone

Website

Account Owner

Account Site

Industry

Account Owner

Andrei Kukhar

chuk

Amount Of Children

2

Account Name

Holland's Household

Household Assessable Income

€10.80

Parent Account

Household Proposed Rent

€12.80

Shipping Address

Created By

Andrei

Kukharchuk

, 12/04/2022, 13:53

Last Modified By

Andrei

Kukharchuk

, 13/05/2022, 11:01

Contacts (3)

3 items • Updated a few seconds ago

	Contact Name	Type	Assessable Income	Tena
1	Ann Holland	Principal Tenant	€104.00	€10.8
2	John Holland	Subsidiary Tenant	€0.00	€0.0
3	Roisin Holland	Subsidiary Tenant	€0.00	€0.0

View All

Tenancies (1)

1 item • Updated a few seconds ago

	Tenancy Name	Property Type	Rent Amount	Start Date	End Da
--	--------------	---------------	-------------	------------	--------

AC Housing Settings

The Housing Settings object is a useful tool for storing additional settings for the AC Housing app. This object includes the 'Default Tenancy Notice Period (days)' field, which allows you to set a default value for the Tenancy Notice Period field on all tenancy records. This field ensures that all tenancies have a consistent notice period, which can save you time and effort when managing your tenancies.

In addition, the Housing Settings object includes the 'Current Tenant Proposed Rent API Name' field, which allows you to change the default Tenant Proposed Rent formula that is used on the 'Tenant' record. Read more about this in the ['Custom formula for Tenant Proposed Rent'](#) section.

To create a settings record, go to the AC Housing app -> Open the 'AC Housing Settings' tab -> Click on the 'New' button -> Enter the number of days you want to use as the default Tenancy Notice Period for tenancies and save changes.

New AC Housing Setting

Information

AC Housing Setting Name

Owner
User User

* Default Tenancy Notice Period (days)
30

Current Tenant Proposed Rent API Name

Cancel Save & New Save

Properties

To create a property, open the 'Properties' tab in the AC Housing app, then click the 'New' button.

AC Housing Home Dashboards Reports Accounts Contacts Tenancies Properties More

Properties All

New Import Change Owner Printable View

15 items • Sorted by Name • Filtered by All properties • Updated a few seconds ago

Search this list...

	Name ↑	Property Block	Rent...	Address	Created Date
1	1-2 Bear Gardens, Southwark, Lon...	1-2 Bear Gardens, Southwark, Lon...	Rent...	1-2 Bear Gardens, Southwark, Lon...	21/03/2023, 15:...
2	11 ADAM STREET Covent Garden, ...	11 ADAM STREET Covent Garden, ...	Rent...	11 ADAM STREET Covent Garden, ...	21/03/2023, 15:...
3	15 Westferry Road, Tower Hamlets...	15 Westferry Road, Tower Hamlets,...	Empty	15 Westferry Road, Tower Hamlets,...	21/03/2023, 15:...
4	153 -157 Tower Bridge Road Sout...	153 -157 Tower Bridge Road South...	Empty	153 -157 Tower Bridge Road South...	21/03/2023, 15:...

Fill in property details, leave the rent status as 'Empty'. Once a tenancy for this property is created, the rent status will automatically be changed to 'Rented'.

New Property

Information

*Property Type
Dwelling

*Name
1-2 Bear Gardens, Southwark, London, SE1 9ED

Property Block
1-2 Bear Gardens, Southwark, London, SE1 9ED

Address
1-2 Bear Gardens, Southwark, London, SE1 9ED

Rent Status
Empty

Owner
Admin User

Active Tenancy Exist
☐

Cancel Save & New Save

Tenancies

To create a tenancy, open the 'Tenancies' tab in the AC Housing app, then click the 'New' button.

AC Housing Home Dashboards Reports Accounts Contacts Tenancies Properties More

Tenancies All

11 items • Sorted by Tenancy Name • Filtered by All tenancies • Updated a few seconds ago

New Import Change Owner Printable View

	Tenancy N...	Property	Tenant	Start Date	Rent A...	Tenant B...	H...
1	T-202303-0	1-2 Bear Gardens, Southwark, London, SE1 9ED	Andy Young	21/12/2021	€140.00	€0.00	✓
2	T-202303-1	11 ADAM STREET Covent Garden, Westminster Borough, Lo...	Benjamin James	21/12/2022	€115.00	-€115.00	✓
3	T-202303-10	1-2 Bear Gardens, Southwark, London, SE1 9ED	Andy Young	01/03/2023	€115.00	-€345.00	✓
4	T-202303-2	15 Westferry Road, Tower Hamlets, London, E14 8JH	Charlotte Holly	21/01/2022	€113.00	-€1,876.00	✓
5	T-202303-3	153 -157 Tower Bridge Road Southwark, Southwark, London,...	Jan Black	21/11/2021	€200.00	€0.00	✓
6	T-202303-4	18-20 York's Building, Westminster Borough, London, WC2N...	Liam William	21/04/2023	€100.00	€600.00	✓
7	T-202303-5	19 Bedford Place, Camden, London, WC1B 5JA	Lucas Bocka	21/06/2023	€150.00	€0.00	✓
8	T-202303-6	2621 Lyndale Ave S, Minneapolis, MN 55408, United States	Noah Gregory	21/10/2021	€110.00	-€4,230.00	✓
9	T-202303-7	37-39 Kingsway, Westminster Borough, London, WC2B 6TP	Smith Cooper	21/01/2023	€160.00	-€690.00	✓
10	T-202303-8	4 North Wharf Road, Westminster Borough, London, W2 1NW	Sofia Wong	22/03/2022	€210.00	-€4,200.00	✓
11	T-202303-9	48-56 Bayham Place, Camden, London, NW1 0EU	Tommy Alvaz	21/12/2022	€110.00	-€110.00	✓

Fill in tenancy details such as household, tenant, property, rent amount and number of account receivables, and click the 'Save' button.

Note: To create a tenancy for a person account, enter the person account in both fields: Household and Tenant.

Note: Don't fill in the fields in the 'Calculated automatically' section. The system will do this automatically.

Calculated automatically (please do not fill out):

Tenant Balance ⓘ €0.00	Prolongation Date ⓘ
End Date ⓘ 	Notice Date
Has Void ⓘ ☐	

You can create a tenancy directly from a household record by clicking on the 'Create Tenancy' button. The fields Household, Tenant and Notice Period will be filled in automatically in this way.

The screenshot shows the AC Housing system interface. The top navigation bar includes 'AC Housing', 'Home', 'Dashboards', 'Reports', 'Accounts', 'Contacts', 'Tenancies', 'Properties', and 'More'. The main content area displays the 'Account: Alvazer's Household' with a '+ Follow' button and a 'Create Tenancy' button highlighted in a red box. Below this, there are summary statistics: 'Sum Of Tenants Proposed Rents: €74.80' and 'Household Proposed Rent: €74.80'. The left sidebar shows account details: 'Account Owner: Admin User', 'Account Name: Alvazer's Household', and 'Account Record Type: Household'. The right sidebar shows 'Contacts (1)' with a table listing one contact: 'Tommy Alvazer' (Principal Tenant) with 'Assessable...' value of €424.00 and 'Tenant Pro...' value of €74.80. A 'View All' link is at the bottom of the contacts list.

New Tenancy

*Household

Alvazer's household

*Tenant

Koll Alvazer

*Property

*Rent Amount

*Start Date

Payment Frequency

Weekly

*Number Of Account Receivables

*Notice Period (days)

Cancel

Create New

You can create a tenancy directly from a tenant record by clicking on the 'New' button in the Tenancies related list. The Tenant field will be filled in automatically.

AC Housing
Home Dashboards Reports Accounts **Contacts** Tenancies Properties More

Mr. Tommy Alvazer

[Follow](#)
[Edit](#)
[Clone](#)
[Delete](#)

Title

Account Name [Alvazer's Household](#)

Phone (2)

Email

Contact Owner

Admin User

Name: Mr. Tommy Alvazer

Tenant Proposed Rent: €74.80

Contact Record Type: Tenant

Type: Principal Tenant

Contact Owner: Admin User

Account Name: Alvazer's

Tenancies (1)

[Filter](#)
[Refresh](#)
[New](#)

1 item • Sorted by Start Date • Updated a minute ago

	Tenancy N...	Property T...	Start Date ↓	End Date	Property
1	T-202303-9	Dwelling	21/12/2022	7/6/2023	48-56 Bayham P...

[View All](#)

Housing Benefits (0)

[New](#)

New Tenancy

Information

* Household
 Q

* Tenant

Tommy Alvazer
X

* Property
 Q

* Rent Amount

* Number Of Account Receivables

* Start Date
 📅

Payment Frequency

Weekly
▼

Notice Period (days)

Prolongation Period (days)

Notes

Salesforce Sans ▼
12 ▼
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≡

You can create a tenancy directly from a property record by clicking on the 'New' button in the Tenancies related list. The Property field will be filled in automatically.

Property

1-2 Bear Gardens, Southwark, London, SE1 9ED

[Edit](#)
[Delete](#)

Details

Property Type Dwelling Name 1-2 Bear Gardens, Southwark, London, SE1 9ED Property Block 1-2 Bear Gardens, Southwark, London, SE1 9ED Address 1-2 Bear Gardens, Southwark, London, SE1 9ED Rent Status Rented Created By Admin User, 21/03/2023, 15:24	Owner Admin User Active Tenancy Exist ✓ Last Modified By Min Access, 22/03/2023, 11:47
---	---

Voids (1)

Void-21/03/2023-0

Void Start ... 20/12/2022

Void Actual...

[View All](#)

Tenancies (2)

Andy Young

Tenancy ... T-202303-0

Rent Am... €140.00

Start Date: 21/12/2021

Andy Young

Tenancy ... T-202303-10

Rent Am... €115.00

New Tenancy

Information

* Household

* Tenant

* Property

1-2 Bear Gardens, Southwark, London, SE1
✕

* Rent Amount

* Number Of Account Receivables

* Start Date

Payment Frequency

Weekly
▼

Notice Period (days)

Prolongation Period (days)

Notes

Salesforce Sane
▼
12
▼

Cancel
Save & New
Save

Housing Benefits

To create a housing benefit, open the 'Housing Benefits' tab in the AC Housing app, then click the 'New' button.

AC Housing

Home Dashboards Reports Accounts Contacts Tenancies **Housing Benefits** More

Housing Benefits

All

New Import Change Owner Printable View

3 items • Sorted by Housing Benefit Name • Filtered by All housing benefits • Updated a few seconds ago

Search this list...

	Housing Benefit ...	Tenant	Amount	Start Date	End Date
1	HB13	Charlotte Holly	€13.00	21/02/2023	08/04/2023
2	HB25	Liam William	€25.00	21/04/2023	21/06/2023
3	HB40	Lucas Bocka	€40.00	21/07/2023	21/09/2023

Fill in housing benefit details and click the 'Save' button.

You can create a housing benefit directly from a tenant record by clicking on the 'New' button in the Housing Benefits related list. The Tenant field will be filled in automatically.

Contact
Mr. Liam William

Follow Edit Clone Delete

Title Account Name Phone (2) Email Contact Owner
 William's Household Admin User

Name: Mr. Liam William
 Tenant Proposed Rent: €75.00

Contact Record Type: Tenant
 Type: Principal Tenant
 Contact Owner: Admin User
 Account Name: William's Household
 Title:
 Birthdate:
 Home Phone:

Tenancies (1)
 1 item • Sorted by Start Date • Updated a few seconds ago

	Tenancy N...	Property T...	Start Date ↓	End Date ↓	Property ↓
1	T-202303-4	Dwelling	21/4/2023		18-20 York's Bui...

[View All](#)

Housing Benefits (1)
 1 item • Sorted by Start Date • Updated a few seconds ago

	Housing B...	Property Ty...	Amount ↓	Start Date ↓	End Date ↓
1	HB25	Dwelling	€25.00	21/4/2023	21/6/2023

[View All](#)

New Housing Benefit

Information

* Housing Benefit Name:

* Amount:

* Tenant:

* Property Type:

* Start Date:

* End Date:

Owner: Admin User

Applicability Note:

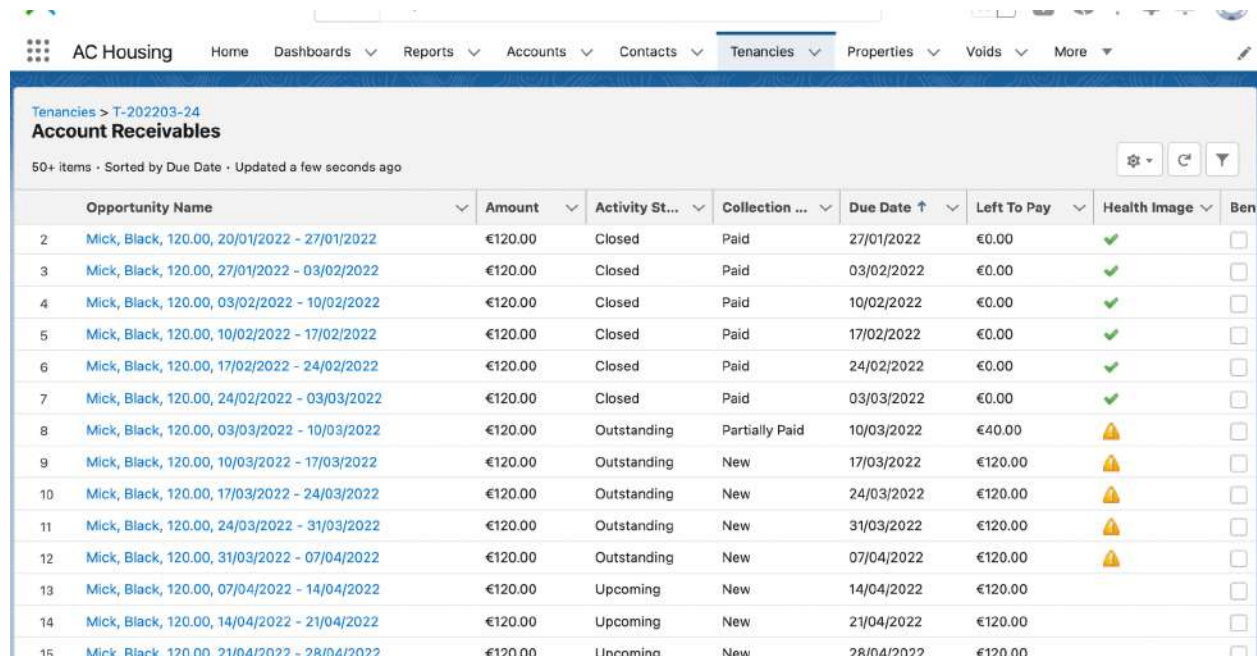
Cancel Save & New Save

All contacts can have one or more housing benefits, but they cannot overlap in time.

Account Receivables

A set of account receivables is created automatically after tenancy is created. The status of the newly created account receivables is 'Upcoming'. Once the account receivable period begins, the status will be changed to 'Active'.

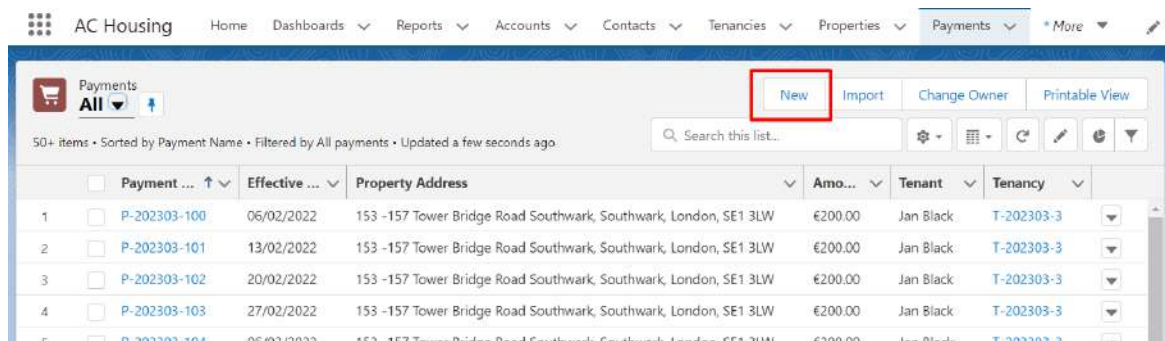
If the account receivable was fully paid before its due date, the status will be changed to 'Closed'. Otherwise, if the account receivable was partially paid or unpaid at all before its due date, the status will be changed to 'Outstanding'.



	Opportunity Name	Amount	Activity St...	Collection ...	Due Date ↑	Left To Pay	Health Image	Ben
2	Mick, Black, 120.00, 20/01/2022 - 27/01/2022	€120.00	Closed	Paid	27/01/2022	€0.00	✓	☐
3	Mick, Black, 120.00, 27/01/2022 - 03/02/2022	€120.00	Closed	Paid	03/02/2022	€0.00	✓	☐
4	Mick, Black, 120.00, 03/02/2022 - 10/02/2022	€120.00	Closed	Paid	10/02/2022	€0.00	✓	☐
5	Mick, Black, 120.00, 10/02/2022 - 17/02/2022	€120.00	Closed	Paid	17/02/2022	€0.00	✓	☐
6	Mick, Black, 120.00, 17/02/2022 - 24/02/2022	€120.00	Closed	Paid	24/02/2022	€0.00	✓	☐
7	Mick, Black, 120.00, 24/02/2022 - 03/03/2022	€120.00	Closed	Paid	03/03/2022	€0.00	✓	☐
8	Mick, Black, 120.00, 03/03/2022 - 10/03/2022	€120.00	Outstanding	Partially Paid	10/03/2022	€40.00	⚠	☐
9	Mick, Black, 120.00, 10/03/2022 - 17/03/2022	€120.00	Outstanding	New	17/03/2022	€120.00	⚠	☐
10	Mick, Black, 120.00, 17/03/2022 - 24/03/2022	€120.00	Outstanding	New	24/03/2022	€120.00	⚠	☐
11	Mick, Black, 120.00, 24/03/2022 - 31/03/2022	€120.00	Outstanding	New	31/03/2022	€120.00	⚠	☐
12	Mick, Black, 120.00, 31/03/2022 - 07/04/2022	€120.00	Outstanding	New	07/04/2022	€120.00	⚠	☐
13	Mick, Black, 120.00, 07/04/2022 - 14/04/2022	€120.00	Upcoming	New	14/04/2022	€120.00		☐
14	Mick, Black, 120.00, 14/04/2022 - 21/04/2022	€120.00	Upcoming	New	21/04/2022	€120.00		☐
15	Mick, Black, 120.00, 21/04/2022 - 28/04/2022	€120.00	Upcoming	New	28/04/2022	€120.00		☐

Payment

To create a payment, open the 'Payments' tab in the AC Housing app, then click the 'New' button.



	Payment ...	Effective ...	Property Address	Amo...	Tenant	Tenancy
1	☐ P-202303-100	06/02/2022	153 -157 Tower Bridge Road Southwark, Southwark, London, SE1 3LW	€200.00	Jan Black	T-202303-3
2	☐ P-202303-101	13/02/2022	153 -157 Tower Bridge Road Southwark, Southwark, London, SE1 3LW	€200.00	Jan Black	T-202303-3
3	☐ P-202303-102	20/02/2022	153 -157 Tower Bridge Road Southwark, Southwark, London, SE1 3LW	€200.00	Jan Black	T-202303-3
4	☐ P-202303-103	27/02/2022	153 -157 Tower Bridge Road Southwark, Southwark, London, SE1 3LW	€200.00	Jan Black	T-202303-3
5	☐ P-202303-104	06/03/2022	153 -157 Tower Bridge Road Southwark, Southwark, London, SE1 3LW	€200.00	Jan Black	T-202303-3

Fill in payment details such as tenancy, amount, tenant and effective date, and click the 'Save' button. Allocation Left Amount is a system-managed field, leave it blank.

New Payment

Information

Tenancy

T-202207-308

Allocation Left Amount

€0.00

* Amount

€0.00

* Effective Date

Owner

Andrei Kukharchuk

Cancel

Save & New

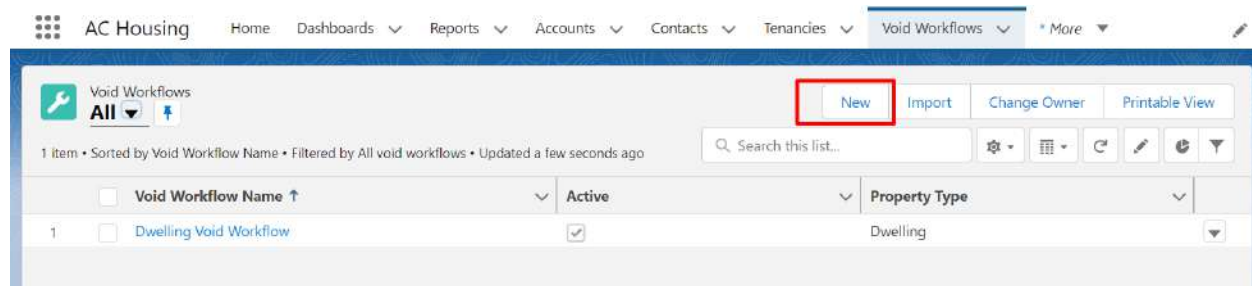
Save

You can edit and delete payments, but only if the payment's effective date is in the future.

Voids

Create Void Workflow

To make void creation available, you need to create a void workflow. To make so, open the 'Void Workflows' tab in the AC Housing app, then click the 'New' button.



Select the property type that this workflow will be applied to, give it a name and mark it as active, then click the 'Save' button.

Then create void workflow tasks for this void workflow by clicking on the 'New' button in the 'Void Workflow Tasks' related list. **Note:** There must be at least one void workflow task in a void workflow for void creation to be available.

AC Housing

Home

Dashboards

Reports

Accounts

Contacts

Tenancies

Void Workflows

* More

Void Workflow

New Void Workflow

Edit Delete Clone

Void Workflow Tasks (0)

New

Details

Void Workflow Name

New Void Workflow

Active

☒

Property Type

Garage

Owner

Admin User

Created By

Admin User, 27/03/2023, 06:17

New Void Workflow Task

Information

Void Workflow Task Name

* Milestone

Pre-Void

View all dependencies

Task Record Type

--None--

View all dependencies

Task Type

--None--

View all dependencies

* Void Workflow

Dwelling Void Workflow

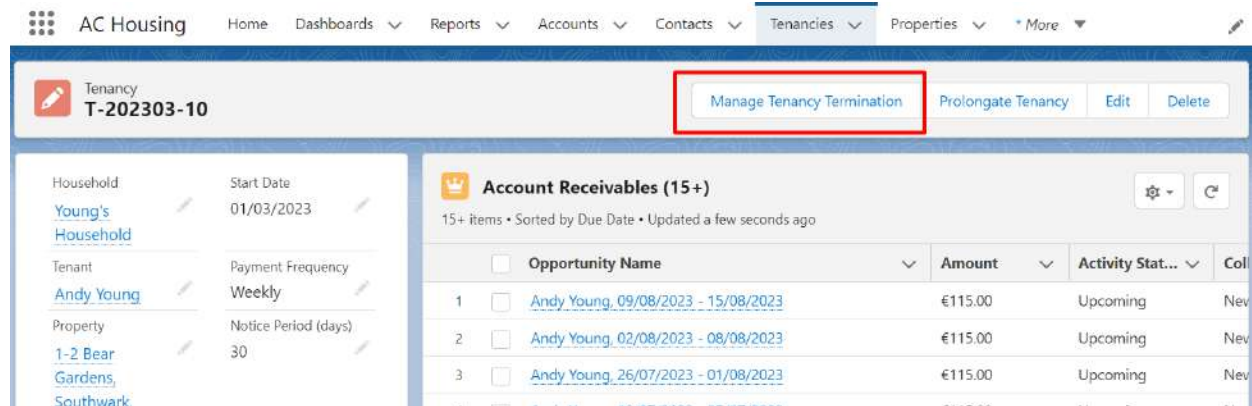
Cancel

Save & New

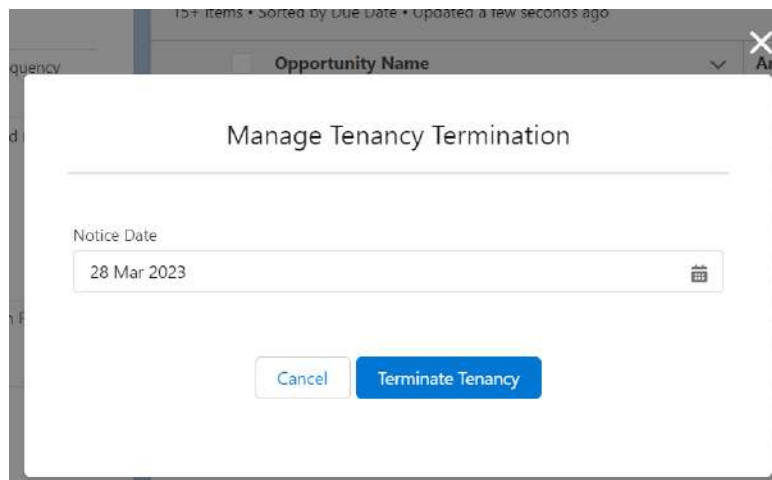
Save

Create Void

A void is created automatically after initiating tenancy termination. To initiate tenancy termination, open a tenancy record and click the 'Manage Tenancy Termination' button.



Select a notice date and click the 'Terminate Tenancy' button.



After that a void will be created with a start date equal to Tenancy Notice Date + Tenancy Notice Period.

Tenancy

T-202303-10

Notice Date Updated

Page Tenancy Termination

Edit

Delete

24

Notes

Calculated automatically (please do not fill out):

Tenant Balance

-€345.00

Prolongation Date

End Date

27/04/2023

Notice Date

28/03/2023

Has Void

☒

Created By

Min Access

22/03/2023, 11:47

Last Modified By

Admin User

27/03/2023, 05:41

11	☐	Andy Young, 31/05/2023 - 06/06/2023	€115.00	Upcoming	New
12	☐	Andy Young, 24/05/2023 - 30/05/2023	€115.00	Upcoming	New
13	☐	Andy Young, 17/05/2023 - 23/05/2023	€115.00	Upcoming	New
14	☐	Andy Young, 10/05/2023 - 16/05/2023	€115.00	Upcoming	New
15	☐	Andy Young, 03/05/2023 - 09/05/2023	€115.00	Upcoming	New

View All

Payments (0)

New

Voids (1)

1 item • Updated a few seconds ago

☐	Void Name	Status	Void Start Date	Rent Loss	Total Loss
1	☐ Void-27/03/2023-8	Upcoming Void	27/4/2023	€0.00	€0.00

View All

Create Void Milestone/Void Task Record Type/Void Task Type

To create a new void milestone, void task record type, or void task type, go to Setup -> Picklist Value Sets -> Click on the value set you want to modify.

Setup

Home

Object Manager

pick

Data

Picklist Settings

State and Country/Territory

Picklists

Objects and Fields

Picklist Value Sets

Didn't find what you're looking for?

Try using Global Search.

SETUP

Picklist Value Sets

Help for this Page

Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restricted so users can't add unapproved values through the API.

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Global Value Sets

New

Action	Label	Description
Edit Del	Arrear Milestone	
Edit Del	Arrear Milestone Duration	
Edit Del	Arrear Task Type	
Edit Del	Priority Type	
Edit Del	Void Milestone	
Edit Del	Void Task Record Type	
Edit Del	Void Task Type	

Deleted Global Value Sets (0)

After opening one of the global value sets, click the 'New' button.

SETUP

Picklist Value Sets

Active and inactive picklist values 7 (1,000 max)

Edit

Delete

Values

New

Reorder

Replace

Printable View

Chart Colors

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Pre-Void	Pre-Void	☒	Assigned dynamically	User User, 24/02/2023, 14:05
Edit Del Deactivate	Major	Major	☐	Assigned dynamically	User User, 24/02/2023, 14:05
Edit Del Deactivate	Repairs	Repairs	☐	Assigned dynamically	User User, 24/02/2023, 14:05
Edit Del Deactivate	Void Actions	Void Actions	☐	Assigned dynamically	User User, 24/02/2023, 14:05
Edit Del Deactivate	Void Completion	Void Completion	☐	Assigned dynamically	User User, 24/02/2023, 14:05
Edit Del Deactivate	Letting Actions	Letting Actions	☐	Assigned dynamically	User User, 24/02/2023, 14:05
Edit Del Deactivate	Closed	Closed	☐	Assigned dynamically	User User, 24/02/2023, 14:05

Inactive Values

No Inactive Values values defined.

You can also change the names of the existing values by clicking on the 'Edit' next to the value. **Note:** Don't rename the 'Closed' milestone.

If you want to change the order of the items in the picklist, click on the 'Reorder' button and use the up and down arrows to change the order. **Note:** The last milestone must always be 'Closed'.

SETUP

Picklist Value Sets

Sort Picklist Values

Values

Pre-Void

Major

Repairs

Void Actions

Void Completion

Letting Actions

Closed

Top

Up

Down

Bottom

Default Value

Pre-Void

☐ Display values alphabetically, not in the order entered

Save

Cancel

In order to make a relationship between, for example, a void milestone and a void record tasks type, open the 'Void Milestone' global value set. Then open the Milestone and

Milestone Name fields in different tabs (you need to create relationships in both objects: Void Task and Void Workflow Task).

Picklist Value Sets

Action	Field Label	Object	Assigned dynamically	Modified By	Modified Date
Edit Del Deactivate	Pre-Void	Pre-Void	☒	Andrei Kukharchuk	05/05/2022, 14:06
Edit Del Deactivate	Major	Major	☐	Andrei Kukharchuk	27/04/2022, 08:59
Edit Del Deactivate	Repairs	Repairs	☐	Andrei Kukharchuk	27/04/2022, 08:59
Edit Del Deactivate	Void Actions	Void Actions	☐	Andrei Kukharchuk	27/04/2022, 08:59
Edit Del Deactivate	Void Completion	Void Completion	☐	Andrei Kukharchuk	27/04/2022, 08:59
Edit Del Deactivate	Letting Actions	Letting Actions	☐	Andrei Kukharchuk	27/04/2022, 08:59
Edit Del Deactivate	Closed	Closed	☐	Andrei Kukharchuk	27/04/2022, 08:59

Inactive Values
No Inactive Values values defined.

Fields Where Used

Field Label	Object	Data Type	Controlling Field
Current Milestone	Void	Picklist	
Milestone	Milestone	Picklist	
Milestone	Void Workflow Task	Picklist	
Milestone Name	Void Task	Picklist	

On both tabs, click the 'Edit' in the 'Field Dependencies' section.

Void Workflow Task

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Required ☒

Default Value

Picklist Options

Restrict picklist to the values defined in the value set ☒

Picklist Values Used

Active and inactive picklist values 7 (1,000 max)

Field Dependencies [New](#) [Field Dependencies Help](#)

Action	Dependent Field	Data Type	Modified By
Edit Del	Task Record Type	Picklist	Andrei Kukharchuk, 29/04/2022, 10:49

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

Values [View Void Milestone Value Set](#) [Values Help](#)

Create new dependencies by selecting which record types are available for each milestone. Result example:

SETUP > OBJECT MANAGER

Void Workflow Task

• Use the Preview button to test the results.

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Milestone:	Pre-Void	Major	Repairs	Void Actions	Void Completion
Task Record Type:	Administrative	Administrative	Administrative	Administrative	Administrative
	Inspections	Inspections	Inspections	Inspections	Inspections
	Inventory Change	Inventory Change	Inventory Change	Inventory Change	Inventory Change
	Professional Checks	Professional Checks	Professional Checks	Professional Checks	Professional Checks
	Standard Repairs	Standard Repairs	Standard Repairs	Standard Repairs	Standard Repairs
	Key Management	Key Management	Key Management	Key Management	Key Management
	Meter Readings	Meter Readings	Meter Readings	Meter Readings	Meter Readings
	Cleaning	Cleaning	Cleaning	Cleaning	Cleaning
	Longterm	Longterm	Longterm	Longterm	Longterm

Showing Columns: 1 - 5 (of 7) < Previous | Next > View All Go to

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Save Cancel Preview

SETUP > OBJECT MANAGER

Void Task

• Use the Preview button to test the results.

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Milestone Name:	Pre-Void	Major	Repairs	Void Actions	Void Completion
Task Record Type:	Administrative	Administrative	Administrative	Administrative	Administrative
	Inspections	Inspections	Inspections	Inspections	Inspections
	Inventory Change	Inventory Change	Inventory Change	Inventory Change	Inventory Change
	Professional Checks	Professional Checks	Professional Checks	Professional Checks	Professional Checks
	Standard Repairs	Standard Repairs	Standard Repairs	Standard Repairs	Standard Repairs
	Key Management	Key Management	Key Management	Key Management	Key Management
	Meter Readings	Meter Readings	Meter Readings	Meter Readings	Meter Readings
	Cleaning	Cleaning	Cleaning	Cleaning	Cleaning
	Longterm	Longterm	Longterm	Longterm	Longterm

Showing Columns: 1 - 5 (of 7) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Save Cancel Preview

Reminder: The dependencies for the 'Void Milestone', 'Void Task Record Type', and 'Void Task Type' picklists for the Void Task and Void Workflow Task objects must be configured the same way to avoid errors.

Attention: Manually adding or deleting milestones in a void will not affect the milestones displayed in Path because Path displays values from the 'Void Milestone' global value set.

Create Void Task

Void tasks are created automatically at the moment of creation of a void. The tasks that should be automatically created are defined in a void workflow. You also can add new void tasks manually by clicking on the 'New' button in the 'Void Tasks' related list.

The screenshot shows the AC Housing app interface. On the left, there's a sidebar with 'AC Housing' and a 'Losses' section showing financial data. The main area displays 'Void Tasks (15+)' with a table of tasks. A 'New' button is highlighted with a red box in the top right corner of the 'Void Tasks' section.

	Void Task: Void T...	Task Status	Task Progress	Cost Amount	Milestone Name
1	Pre-termination inspe...	Done	✓	£0.00	Pre-Void
2	Void Pre-Inspection f...	Done	✓	£0.00	Pre-Void
3	Advertise on CBL syst...	Done	✓	£0.00	Void Actions
4	Ventilation Check for ...	Done	✓	£0.00	Void Actions
5	Ventilation Check for ...	To Do		£0.00	Void Actions
6	Electrical Safety Che...	To Do		£0.00	Void Actions
7	Gas Safety Check for ...	To Do		£0.00	Void Actions
8	Return Key for Void-2...	To Do		£0.00	Void Actions
9	General Cleaning for ...	To Do		£0.00	Void Actions
10	Void Post-Inspection ...	To Do		£0.00	Void Completion
11	Standard cleaning for ...	To Do		£0.00	Void Completion

Arrears

Create Arrear Workflow

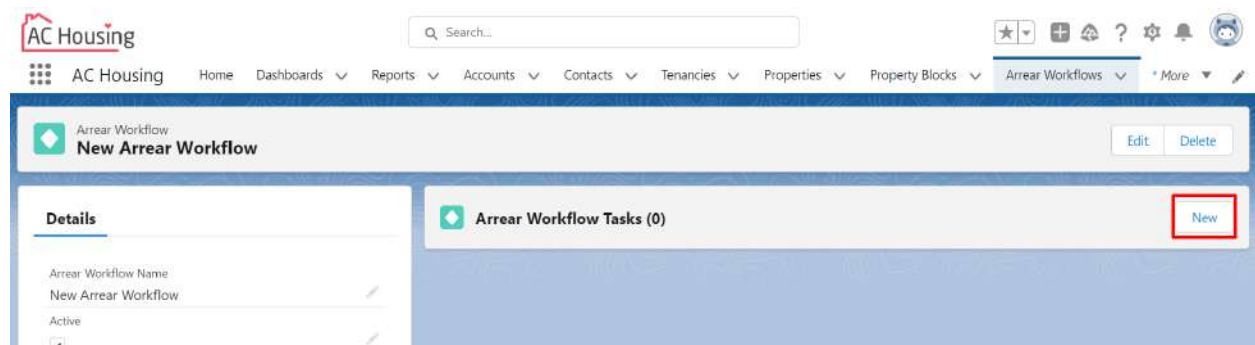
To make automatic arrear creation available, you need to create an arrear workflow. To make so, open the 'Arrear Workflows' tab in the AC Housing app, then click the 'New' button.

The screenshot shows the AC Housing app interface with the 'Arrear Workflows' tab selected. A 'New' button is highlighted with a red box in the top right corner of the 'Arrear Workflows' section.

	Arrear Workflow Name ↑	Active
1	Demo Arrear Workflow	✓

Give it a name and mark it as active, then click the 'Save' button.

Then create arrear workflow tasks for this arrear workflow by clicking on the 'New' button in the 'Arrear Workflow Tasks' related list.



Arrears Creation

Arrears are automatically created when the tenancy balance goes below zero on the Account Receivable Due Date. The Arrear Milestone is by default set to the first milestone value from the Arrear Milestone picklist.

Arrears Tasks Creation

Arrears tasks are automatically created by the system according to the Arrear Task Creation Delay field. This means that a task with a delay of 0 will be created on the day of the arrear creation, and a task with a delay of 7 will be created a week after the arrear creation.

In addition to automatically arrear creation, you can also manually create arrear tasks by clicking on the 'New' button in the 'Arrear Tasks' related list.

The screenshot shows the 'AC Housing' interface for 'Arrear-0002'. On the left, there's a sidebar with details like 'Arrear Name: Arrear-0002', 'Tenant: Charlotte Holly', 'Amount: €1,876.00', 'Current Milestone: 3 weeks', 'Start Date: 27/01/2022', 'Created By: Admin User', 'End Date', 'Last Modified By: Admin User', and 'Last Modified: 21/03/2023, 15:36'. The main area shows a progress bar with stages: '3 weeks' (active), '4 weeks', 'Pre-Court', 'Court SPO', 'Eviction', and 'Closed'. Below the progress bar, there's a section titled 'Arrear Task (5)' with a 'New' button highlighted in a red box. The table below lists 5 tasks:

	Arrear Task Name	Task Progr...	Arrear ...	Arrear Mil...	Arrear Task Type
1	1st Automated Commu...	✓	1 week	7	1st Automated Communication
2	2nd Automated Commu...	✓	2 weeks	7	2nd Automated Communication
3	Call Tenant for Arrear-0...	✓	2 weeks	7	Call Tenant
4	3rd Automated Commu...	✓	3 weeks	7	3rd Automated Communication
5	Visit Tenant for Arrear-0...		3 weeks	7	Visit Tenant

Create Arrear Milestone/Arrear Milestone Duration/Arrear Task Type

To create a new arrear milestone, arrear milestone duration or arrear task type, go to Setup -> Picklist Value Sets -> Click on the value set you want to modify.

The screenshot shows the 'Setup' page in the AC Housing interface, specifically the 'Picklist Value Sets' section. The left sidebar shows a navigation menu with 'Data', 'Picklist Settings', 'State and Country/Territory', 'Picklists', 'Objects and Fields', and 'Picklist Value Sets'. The main area is titled 'Picklist Value Sets' and contains a table of 'Global Value Sets'. The table has columns for 'Action' and 'Label'. The first three rows are highlighted with a red box:

Action	Label
Edit Del	Arrear Milestone
Edit Del	Arrear Milestone Duration
Edit Del	Arrear Task Type
Edit Del	Property Type
Edit Del	Void Milestone
Edit Del	Void Task Report Type
Edit Del	Void Task Type

After opening one of the global value sets, click the 'New' button.

Values

New Reorder Replace Printable View Chart Colors ▼

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	1day	1day	☐	Assigned dynamically	Andrei Kukharchuk, 17/05/2022, 08:36
Edit Del Deactivate	2days	2days	☐	Assigned dynamically	Andrei Kukharchuk, 17/05/2022, 08:36
Edit Del Deactivate	3days	3days	☐	Assigned dynamically	Andrei Kukharchuk, 17/05/2022, 08:36
Edit Del Deactivate	4days	4days	☐	Assigned dynamically	Andrei Kukharchuk, 17/05/2022, 08:36
Edit Del Deactivate	Pre-Court	Pre-Court	☐	Assigned dynamically	Andrei Kukharchuk, 29/03/2022, 09:55
Edit Del Deactivate	Court SPO	Court_SPO	☐	Assigned dynamically	Andrei Kukharchuk, 29/03/2022, 09:55
Edit Del Deactivate	Eviction	Eviction	☐	Assigned dynamically	Andrei Kukharchuk, 29/03/2022, 09:55
Edit Del Deactivate	Closed	Closed	☐	Assigned dynamically	Andrei Kukharchuk, 31/03/2022, 13:18
Edit Del Deactivate	1 week	1 week	☐	Assigned dynamically	Andrei Kukharchuk, 17/05/2022, 11:30
Edit Del Deactivate	2 weeks	2 weeks	☐	Assigned dynamically	Andrei Kukharchuk, 17/05/2022, 11:30
Edit Del Deactivate	3 weeks	3 weeks	☐	Assigned dynamically	Andrei Kukharchuk, 17/05/2022, 11:30
Edit Del Deactivate	4 weeks	4 weeks	☐	Assigned dynamically	Andrei Kukharchuk, 17/05/2022, 11:30

Inactive Values

You can also change the names of the existing values by clicking on the 'Edit' next to the value. **Note:** Don't rename the 'Closed' milestone.

If you want to change the order of the items in the picklist, click on the 'Reorder' button and use the up and down arrows to change the order. **Note:** The last milestone must always be 'Closed'.

 **SETUP**
Picklist Value Sets

Sort Picklist Values

Values

1day
2days
3days
4days
Pre-Court
Court SPO
Eviction
Closed
1 week
2 weeks
3 weeks
4 weeks

Top

Up

Down

Bottom

Default Value

--None--

☐ Display values alphabetically, not in the order entered

In order to make a relationship between, for example, an arrear milestone and an arrear task type, open the 'Arrear Milestone' global value set. Then open the Milestone and Milestone Name fields in different tabs (you need to create relationships in both objects: Arrear Task and Arrear workflow Task).

SETUP

Picklist Value Sets

Action	Field Label	Object	Assigned dynamically	Modified By	Modified Date
Edit Del Deactivate	Pre-Court	Pre-Court	☐	Andrei Kukharchuk	29/03/2022, 09:55
Edit Del Deactivate	Court SPO	Court_SPO	☐	Andrei Kukharchuk	29/03/2022, 09:55
Edit Del Deactivate	Eviction	Eviction	☐	Andrei Kukharchuk	29/03/2022, 09:55
Edit Del Deactivate	Closed	Closed	☐	Andrei Kukharchuk	31/03/2022, 13:18
Edit Del Deactivate	1 week	1 week	☐	Andrei Kukharchuk	17/05/2022, 11:30
Edit Del Deactivate	2 weeks	2 weeks	☐	Andrei Kukharchuk	17/05/2022, 11:30
Edit Del Deactivate	3 weeks	3 weeks	☐	Andrei Kukharchuk	17/05/2022, 11:30
Edit Del Deactivate	4 weeks	4 weeks	☐	Andrei Kukharchuk	17/05/2022, 11:30

Inactive Values

No Inactive Values values defined.

Fields Where Used

Field Label	Object	Data Type	Controlling Field
Arrear Milestone	Arrear Task	Picklist	
Arrear Milestone	Arrear Workflow Task	Picklist	
Current Milestone	Arrear	Picklist	

On both tabs, click the 'Edit' in the 'Field Dependencies' section.

Setup

[Home](#)

Object Manager

SETUP > OBJECT MANAGER

Arrear Task

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Picklist Options

Restrict picklist to the values defined in the value set ☒

Picklist Values Used

Active and inactive picklist values 8 (1,000 max)

Field Dependencies

Action	Dependent Field	Data Type	Modified By
Edit Del	Arrear Milestone Duration (days)	Picklist	Admin User, 21/03/2023, 15:07
Edit Del	Arrear Task Type	Picklist	Admin User, 21/03/2023, 15:07

Validation Rules

No validation rules defined.

Create new dependencies by selecting which record types are available for each milestone. Result example:

SETUP > OBJECT MANAGER

Arrear Task

For change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.

- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Include Values Exclude Values

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Showing Columns: 1 - 5 (of 8) < Previous | Next > View All Go to

Arrear Milestone:	1 week	2 weeks	3 weeks	4 weeks	Pre-Court
Arrear Task Type:	1st Automated Communication	1st Automated Communication	1st Automated Communication	1st Automated Communication	1st Automated Communication
	Call Tenant	Call Tenant	Call Tenant	Call Tenant	Call Tenant
	2nd Automated Communication	2nd Automated Communication	2nd Automated Communication	2nd Automated Communication	2nd Automated Communication
	Visit Tenant	Visit Tenant	Visit Tenant	Visit Tenant	Visit Tenant
	3rd Automated Communication	3rd Automated Communication	3rd Automated Communication	3rd Automated Communication	3rd Automated Communication
	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession
	Prepare To Court	Prepare To Court	Prepare To Court	Prepare To Court	Prepare To Court
	Contact Court	Contact Court	Contact Court	Contact Court	Contact Court
	Attend Court	Attend Court	Attend Court	Attend Court	Attend Court
	Create Arrears Arrangement	Create Arrears Arrangement	Create Arrears Arrangement	Create Arrears Arrangement	Create Arrears Arrangement
	Issue Eviction Warrant	Issue Eviction Warrant	Issue Eviction Warrant	Issue Eviction Warrant	Issue Eviction Warrant

Showing Columns: 1 - 5 (of 8) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist:

Setup Home Object Manager

SETUP > OBJECT MANAGER

Arrear Workflow Task

Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.

Use the Preview button to test the results.

Include Values Exclude Values

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Showing Columns: 1 - 5 (of 8) < Previous | Next > View All Go to

Arrear Milestone:	1 week	2 weeks	3 weeks	4 weeks	Pre-Court
Arrear Task Type:	1st Automated Communication	1st Automated Communication	1st Automated Communication	1st Automated Communication	1st Automated Communication
	Call Tenant	Call Tenant	Call Tenant	Call Tenant	Call Tenant
	2nd Automated Communication	2nd Automated Communication	2nd Automated Communication	2nd Automated Communication	2nd Automated Communication
	Visit Tenant	Visit Tenant	Visit Tenant	Visit Tenant	Visit Tenant
	3rd Automated Communication	3rd Automated Communication	3rd Automated Communication	3rd Automated Communication	3rd Automated Communication
	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession
	Prepare To Court	Prepare To Court	Prepare To Court	Prepare To Court	Prepare To Court
	Contact Court	Contact Court	Contact Court	Contact Court	Contact Court
	Attend Court	Attend Court	Attend Court	Attend Court	Attend Court
	Create Arrears Arrangement	Create Arrears Arrangement	Create Arrears Arrangement	Create Arrears Arrangement	Create Arrears Arrangement
	Issue Eviction Warrant	Issue Eviction Warrant	Issue Eviction Warrant	Issue Eviction Warrant	Issue Eviction Warrant

Showing Columns: 1 - 5 (of 8) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Reminder: The dependencies for the 'Arrear Milestone', 'Arrear Milestone Duration', and 'Arrear Task Type' picklists for the Arrear Task and Arrear Workflow Task objects must be configured the same way to avoid errors.

Important: If you are creating a new arrear milestone, it's important to create a dependency with the 'Other' arrear task type.

Showing Columns: 1 - 8 (of 8) View sets of 5								
Arrear Milestone:	1 week	2 weeks	3 weeks	4 weeks	Pre-Court	Court SPO	Eviction	Closed
Arrear Task Type:	1st Automated Communication	1st Automated Communication	1st Automated Communication	1st Automated Communication	1st Automated Communication	1st Automated Communication	1st Automated Communication	1st Automated Communication
	Call Tenant	Call Tenant	Call Tenant	Call Tenant	Call Tenant	Call Tenant	Call Tenant	Call Tenant
	2nd Automated Communication	2nd Automated Communication	2nd Automated Communication	2nd Automated Communication	2nd Automated Communication	2nd Automated Communication	2nd Automated Communication	2nd Automated Communication
	Visit Tenant	Visit Tenant	Visit Tenant	Visit Tenant	Visit Tenant	Visit Tenant	Visit Tenant	Visit Tenant
	3rd Automated Communication	3rd Automated Communication	3rd Automated Communication	3rd Automated Communication	3rd Automated Communication	3rd Automated Communication	3rd Automated Communication	3rd Automated Communication
	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession	Send Notice Of Seeking Possession
	Prepare To Court	Prepare To Court	Prepare To Court	Prepare To Court	Prepare To Court	Prepare To Court	Prepare To Court	Prepare To Court
	Contact Court	Contact Court	Contact Court	Contact Court	Contact Court	Contact Court	Contact Court	Contact Court
	Attend Court	Attend Court	Attend Court	Attend Court	Attend Court	Attend Court	Attend Court	Attend Court
	Create Arrears Arrangement	Create Arrears Arrangement	Create Arrears Arrangement	Create Arrears Arrangement	Create Arrears Arrangement	Create Arrears Arrangement	Create Arrears Arrangement	Create Arrears Arrangement
	Issue Eviction Warrant	Issue Eviction Warrant	Issue Eviction Warrant	Issue Eviction Warrant	Issue Eviction Warrant	Issue Eviction Warrant	Issue Eviction Warrant	Issue Eviction Warrant
	Other	Other	Other	Other	Other	Other	Other	Other
Showing Columns: 1 - 8 (of 8) View sets of 5								

Important: Do not create dependencies for the arrear milestone with more than one value of arrear milestone duration.

Showing Columns: 1 - 8 (of 8) View sets of 5								
Arrear Milestone:	1 week	2 weeks	3 weeks	4 weeks	Pre-Court	Court SPO	Eviction	Closed
Arrear Milestone Duration (days):	4	4	4	4	4	4	4	4
	7	7	7	7	7	7	7	7
	14	14	14	14	14	14	14	14
	21	21	21	21	21	21	21	21
Showing Columns: 1 - 8 (of 8) View sets of 5								

Kanbans

Kanbans display a graphical view of records in a list view. Each kanban view is based on a list view, and kanban view settings are applied separately for each list view.

The kanbans used in the AC Housing app are shown below.

Void Kanbans

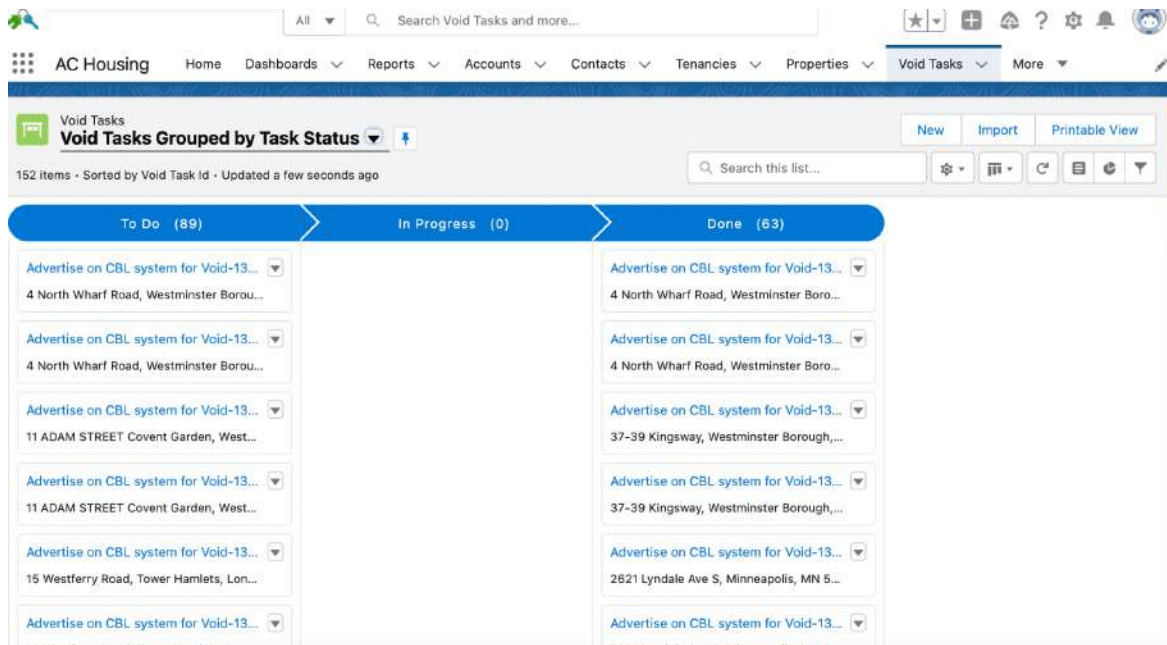
Voids Grouped by Void Status

Upcoming Void (3)	Active Void (3)	Closed Void (3)
€0 Void-13/05/2022-53 €0.00 15 Westferry Road, Tower Hamlets, Lon...	€212 Void-13/05/2022-50 €112.14 4 North Wharf Road, Westminster Boro...	€2,282 Void-13/05/2022-52 €829.86 4 North Wharf Road, Westminster Boro...
Void-13/05/2022-55 €0.00 1-2 Bear Gardens, Southwark, London, ...	Void-13/05/2022-51 €0.00 11 ADAM STREET Covent Garden, West...	Void-13/05/2022-54 €995.00 37-39 Kingsway, Westminster Borough, ...
Void-13/05/2022-56 €0.00 Shaftesbury Avenue, Westminster Boro...	Void-13/05/2022-58 €100.00 2621 Lyndale Ave S, Minneapolis, MN 5...	Void-13/05/2022-57 €457.14 2621 Lyndale Ave S, Minneapolis, MN 5...

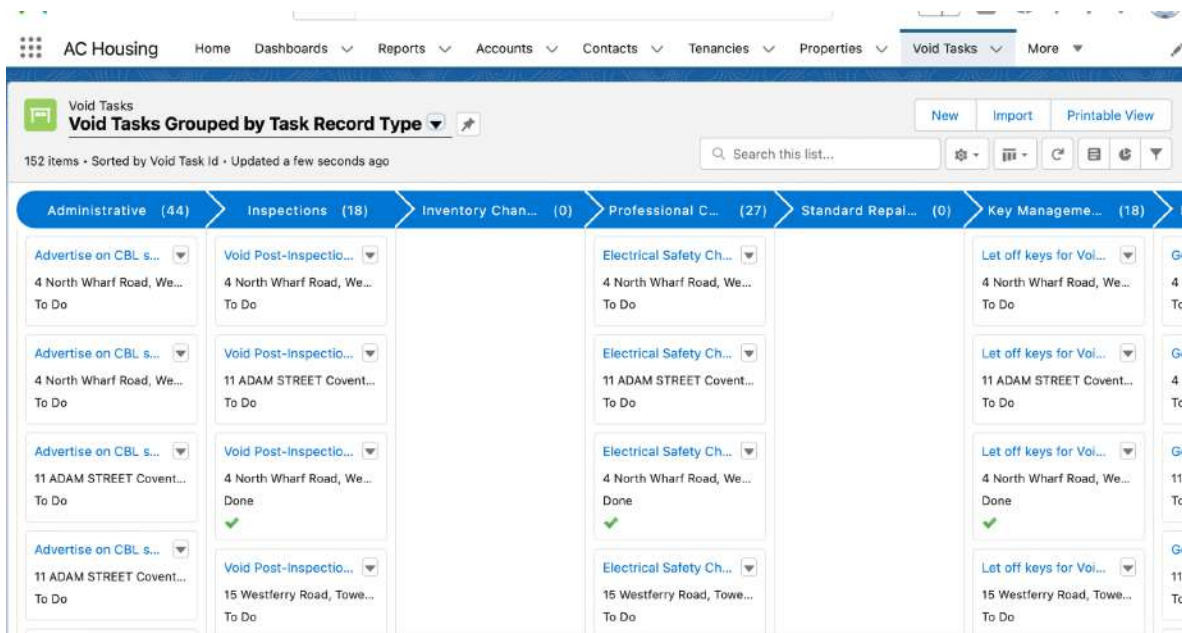
Voids Grouped by Void Milestone

Pre-Void (4)	Major (0)	Repairs (0)	Void Actions (1)	Void Completion (1)	Letting Actions (0)
Void-13/05/2022-51 11 ADAM STREET Covent... Active Void			Void-13/05/2022-50 4 North Wharf Road, We... Active Void	Void-13/05/2022-58 2621 Lyndale Ave S, Minn... Active Void	
Void-13/05/2022-53 15 Westferry Road, Towe... Upcoming Void					
Void-13/05/2022-55 1-2 Bear Gardens, South... Upcoming Void					
Void-13/05/2022-56 Shaftesbury Avenue, We... Upcoming Void					

Void Tasks Grouped by Task Status



Void Tasks Grouped by Task Record Type



Void Tasks Grouped by Task Type

AC Housing

Home Dashboards Reports Accounts Contacts Tenancies Properties **Void Tasks** More

Void Tasks
Void Tasks Grouped by Task Type

152 items • Sorted by Void Task Id • Updated a few seconds ago

Search this list...

Ventilation Che... (9)	Return Key (9)	Property Let Off (0)	Property View... (0)	Electrical Safet... (9)	Gas Safety Che... (9)
Ventilation Check f... 4 North Wharf Road, We... To Do	Return Key for Void... 4 North Wharf Road, We... To Do			Electrical Safety Ch... 4 North Wharf Road, We... To Do	Gas Safety Check f... 4 North Wharf Road, We... Done
Ventilation Check f... 11 ADAM STREET Covent... To Do	Return Key for Void... 11 ADAM STREET Covent... To Do			Electrical Safety Ch... 11 ADAM STREET Covent... To Do	Gas Safety Check f... 11 ADAM STREET Covent... To Do
Ventilation Check f... 4 North Wharf Road, We... Done	Return Key for Void... 4 North Wharf Road, We... Done			Electrical Safety Ch... 4 North Wharf Road, We... Done	Gas Safety Check f... 4 North Wharf Road, We... Done
Ventilation Check f... 15 Westferry Road, Towe... To Do	Return Key for Void... 15 Westferry Road, Towe... To Do			Electrical Safety Ch... 15 Westferry Road, Towe... To Do	Gas Safety Check f... 15 Westferry Road, Towe... To Do

Arrears Kanbans

Arrears Grouped by Arrear Milestone

AC Housing

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Arrears
Arrears Grouped by Arrear Milestones

12 items • Sorted by Arrear Name • Updated a few seconds ago

Search this list...

1 week (4)	2 weeks (2)	3 weeks (0)	4 weeks (0)	Pre-Court (1)	Court SPO (1)	Eviction (0)
Arrear-0009 Fully Paid ☐ Charlotte Holly	Arrear-0005 Fully Paid ☐ Smith Cooper			Arrear-0008 Fully Paid ☐ Andy Young	Arrear-0012 Fully Paid ☐ Charlotte Holly	Arrear-0004 Fully Paid ☐ Noah Gregory
Arrear-0010 Fully Paid ☐ Noah Gregory	Arrear-0011 Fully Paid ☐ Sofia Wong					Arrear-0007 Fully Paid ☒ Tommy Alvazer
Arrear-0013 Fully Paid ☐ Charlotte Holly						
Arrear-0014 Fully Paid ☐ Andy Young						

Arrears Tasks Grouped by Task Status

AC Housing

Search...

Home Dashboards Reports Tenancies Properties Voids Arrears Payments Arrear Tasks

Arrear Tasks

Arrear Tasks Grouped By Task Status

35 items - Sorted by Arrear Task Name - Updated a few seconds ago

Search this list...

To Do (4) In Progress (0) Done (31)

Call Tenant for Arrear-0005
Call Tenant
Arrear-0005
2 weeks

Closed for Arrear-0007
Arrear-0007
Closed

Contact Court for Arrear-0004
Contact Court
Arrear-0004
Eviction

Prepare To Court for Arrear-0007
Prepare To Court
Arrear-0007
Eviction

1st Automated Communication for A...
1st Automated Communication
Arrear-0001
1 week

1st Automated Communication for A...
1st Automated Communication
Arrear-0003
1 week

1st Automated Communication for A...
1st Automated Communication
Arrear-0004
1 week

1st Automated Communication for A...
1st Automated Communication
Arrear-0005
1 week

Arrears Tasks Grouped by Task Type

AC Housing

Search...

Home Dashboards Reports Tenancies Properties Voids Arrears Payments Arrear Tasks More

Arrear Tasks

Arrear Tasks Grouped By Task Type

35 items - Sorted by Arrear Task Name - Updated a few seconds ago

Search this list...

-- None -- (1) 1st Automated ... (5) Call Tenant (5) 2nd Automated... (3) Visit Tenant (2) 3rd Automated... (2) Send Notice Of

Closed for Arrear-0...
Arrear-0007
Closed

1st Automated Com...
1st Automated Communi...
Arrear-0001
1 week

1st Automated Com...
1st Automated Communi...
Arrear-0003
1 week

1st Automated Com...
1st Automated Communi...
Arrear-0004
1 week

1st Automated Com...
1st Automated Communi...
Arrear-0005
1 week

Call Tenant for Arre...
Call Tenant
Arrear-0004
2 weeks

Call Tenant for Arre...
Call Tenant
Arrear-0004
3 weeks

Call Tenant for Arre...
Call Tenant
Arrear-0005
2 weeks

Call Tenant for Arre...
Call Tenant
Arrear-0007
2 weeks

2nd Automated Co...
2nd Automated Communi...
Arrear-0004
2 weeks

2nd Automated Co...
2nd Automated Communi...
Arrear-0005
2 weeks

2nd Automated Co...
2nd Automated Communi...
Arrear-0007
2 weeks

Visit Tenant for Arr...
Visit Tenant
Arrear-0004
3 weeks

Visit Tenant for Arr...
Visit Tenant
Arrear-0007
3 weeks

3rd Automated Co...
3rd Automated Communi...
Arrear-0004
3 weeks

3rd Automated Co...
3rd Automated Communi...
Arrear-0007
3 weeks

Send Notice Of Se...
Send Notice Of See
Arrear-0004
4 weeks

Send Notice Of Se...
Send Notice Of See
Arrear-0007
4 weeks

Get In Touch

AC Housing application is created and maintained by Advanced Communities - Experience Cloud experts.

We specialize in Experience Cloud customization, development, and consulting.

Feel free to contact us regarding anything related to Experience Cloud.

<https://advancedcommunities.com>

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