

## Goldcrest Dynamics 365

The housing sector is facing more legislative and economic challenges than ever. No longer can you rely on the tenant for life with you been asked to deliver more cost-effective services, thus adding pressure to back office managers and their teams.

### Overview

Goldcrest Dynamics 365 is a tailored solution built to manage your complex housing operations. Our focused solution supports you with all your housing management needs in one place and has been developed to simplify key processes. The financial, HR and payroll solutions that Microsoft Dynamics offers can automate key processes and lift the load from staff. Combined with the housing specific functionality of Goldcrest it can help you to drive growth, save costs, get better business insight and better manage your people.

### Advantages of Goldcrest Dynamics 365

- > Resident Profiling: Additional attributes and profiling on the standard contact entity to enhance the data captured for a social housing specific context (e.g. ethnicity, disability, property links etc.).
- > Properties: A new entity to capture property information around areas such as address, room layouts/numbers, occupiers, rent data, and safety check compliance dates.
- > Tenancies: For each property, tenancy data can be stored to highlight when tenants were residing at a property, was it an individual or a family, the rent details and tenancy related data.
- > Households: Groups of contacts (families) can be grouped together into a household and then linked to a tenancy.
- > Case Management: The core product includes some basic case management around queries, repairs etc. to enable customer service advisors to log, track and resolve cases. This includes process specific workflow in Goldcrest Microsoft Dynamics 365.
- > Rent Management: Gives the ability to create tenancies, setup rent accounts and automate charges (monthly/weekly rent), log payments and produce rent statements.
- > Mobile Access: The ability to access on Microsoft Dynamics 365, via a mobile/tablet device, is available through the native Microsoft Dynamics 365 Mobile application.

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## Feedback & Complaints

Building upon the routine Case Management capabilities of the solution, there is a Feedback & Complaints module that can be deployed, designed to improve your efficiency. There is 3 Stage Response and Resolution system which ensures that you are meeting regulations around resolution service level agreements. There are Compensation Calculators which automatically determine and allocate the amount of compensation owed to resident, factoring in the severity and duration of the complaint. There is enhanced visibility around Case Management as you can link multiple cases together if they are around the same subject.

## Anti-Social Behaviour

As well as the general Feedback & Complaints feature of the solution, there is a focused piece built to manage cases of Anti-Social Behaviour. The solution provides an area to store and track complaints, with the ability to link witnesses, accused perpetrators and 3rd party influencers such as the police, solicitors or social workers to the case for improved visibility. The data collected can be used to reduce future turbulence through the Risk Assessment Matrix: A feature built to automatically generate a risk score around the type of complaint, the relationship between those involved, the history of complaints and the severity of the case around physical and mental abuse.

## Arrears & Voids

The management of arrears is made more efficient through the automated workflows of the solution. The process runs nightly to calculate which tenants are in arrears. This transaction data is generally integrated from a finance system and will detect payment patterns to calculate how much rent a tenant usually pays and how often they make payments. Depending on the severity of the arrears, an action plan is generated that can include:

- > Automatically generate a case.
- > Create a phone call to follow-up with the tenant.
- > Send an SMS message to the tenant informing them of their arrear details

## Sales & Lettings

In addition to property and tenancy management, social housing organisations require the ability to track the sales and lettings process of private properties. This module enables sales functionality by including:

- > Schemes: An entity to store the different property build schemes that an organisation is working on, including data around location, marketing materials, contact details, linked properties and pricing.
- > Properties: Builds on the core property entity to include sales specific data such as square footage, parking/property allocations, price, sales status etc.
- > Leads: Used to store enquiry data from potential customers and matches available properties to their location, price, and type criteria. All matched properties are displayed on a Bing map.
- > Opportunities: Once an enquiry/lead has been qualified then an opportunity is generated to manage pipeline and the sales cycle. There may be multiple opportunities for one property.
- > Offers: When a potential customer has been selected from a particular property's opportunities, an offer is generated that manages the process of taking an offer from submitted to accepted.
- > Applications: This area manages the process of taking an application for the following streams, Private Sale, Shared Ownership, Stair casing, Right to Buy, Right to Acquire, Intermediate Market Rent.

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## Contractors Portal

By utilising Microsoft Portals for Dynamics 365, a contractor portal can be deployed that gives 3rd party access to selected Microsoft Dynamics 365 data. Requirements will change on a customer by customer basis, but standard functionality gained within a contractor portal includes:

- > Assigning jobs to contractors to fulfil.
- > Management of that job from start to finish. Including any details or actions that the contractor wants to enter.
- > Management of the contractor approval process. This is a bi-directional process between a contractor (in the portal) and a CRM user where the contractor will confirm the effort/cost required for a particular job and the CRM user/system must approve this before the job can be allocated.
- > The ability for the contractor to upload an invoice into the portal, which can be surfaced into Goldcrest Microsoft Dynamics 365 and sent to the customer.

## Resident Portal

A resident portal can be deployed that gives residents 3rd party access to their data, enabling them to:

- > Update their personal profile information
- > Log a new case and manage the resolution of that case by communicating with the customer service advisor or uploading supporting files to the portal.
- > View rent statements that are generated in Goldcrest Microsoft Dynamics 365 or integrated into Microsoft Dynamics 365 from 3rd party finance package.

## Key Integrations

A huge benefit of the solution is the ability to integrate with your existing business software, creating a seamless feel to your work, maximising usability. Here's how:

- > Finance Systems: Import data around Customer details, Supplier details, Invoicing and Payments. Integrations with a range of solutions including; OpenAccounts, Sage50, Proactis and QLF.
- > Document Management Systems: systems to facilitate document management of items such as tenancy agreements, letters, rent statements. Integrations with a range of solutions including SharePoint, Swordfish, Netcall EDM (Serengeti) and V1
- > Repairs Scheduling: Field Service Management now exists within the solution set allowing you to actively manage appointments, tasks, escalations and setting now exists in the core solution set. Alternatively, integrate with DRS (OptiTime) allowing a repairs scheduling functionality to update details of jobs and details job awaiting completion.
- > Repairs Diagnostics: Goldcrest harnesses the power of key solutions to allow a range of people within an organisation to diagnose issues. This creates improved customer call conversations, driving improved resolutions and improved customer satisfaction by automatically creating repair case records in diagnostic tools such as: M3 Locator Plus and Keyfax

## More information

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