

Esuasive

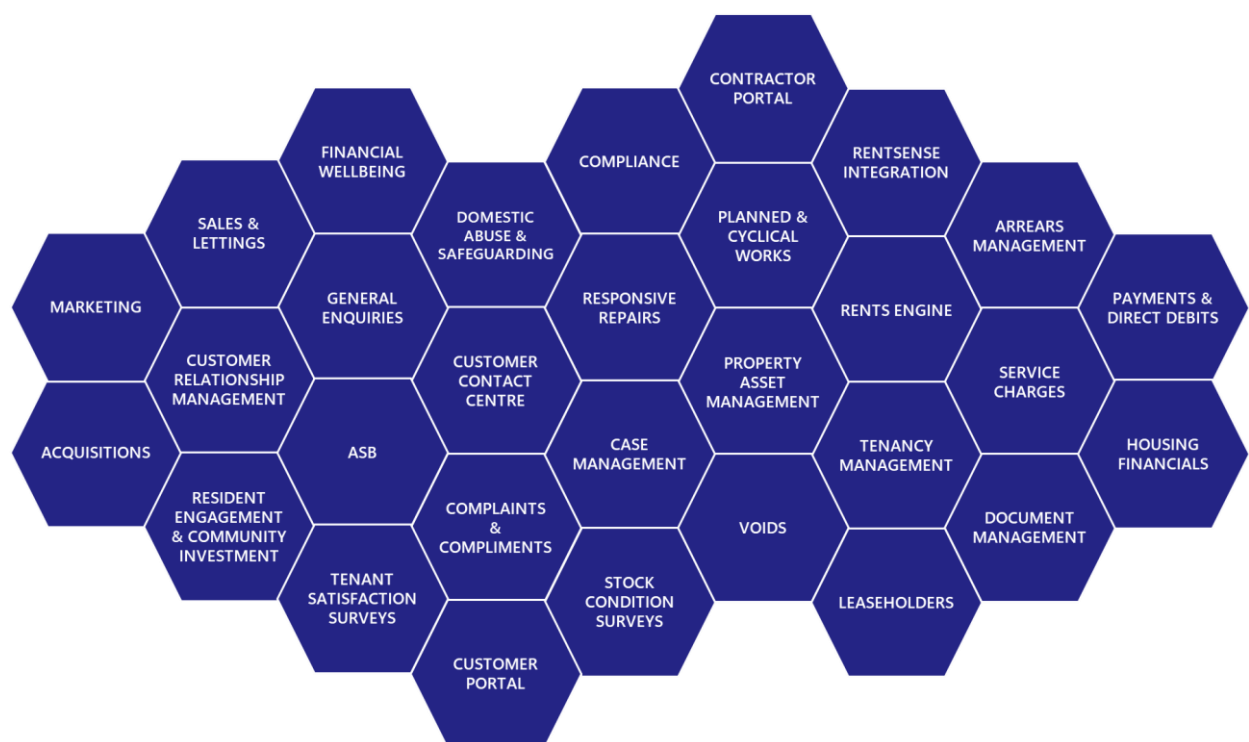
Esuasive Housing

G-Cloud 15 Service Definition

About Esuasive Housing

Capture every customer interaction, schedule and track every repair, keep on top of asset maintenance, ensure compliance, and manage rents, service charges and arrears, all in a single, integrated, modular, cloud-based system which you control.

Esuasive Housing is a suite of pre-configured, ready-to-run social housing modules leveraging the flexibility of the Microsoft Cloud and built on Dynamics 365, Power Apps, Power BI, Power Portals and SharePoint, all linked to a single data repository – the Dataverse – that allows you to connect customers and teams, streamline business processes, deliver customer self-service and generate insights from data across the organisation.



Esuasive Housing: Conceptual Model

Customers can choose to implement Esuasive Housing within a single project, or incrementally as part of a legacy systems replacement / digital transformation programme.

This service definition document covers the implementation of Esuasive Housing Omnia – our complete solution. Please see our other G-Cloud 15 listings for detailed information relating to individual Esuasive Housing solution components, including:

- Esuasive Housing CRM / Customer Service
- Esuasive Housing Property Asset Management
- Esuasive Housing Responsive Repairs
- Esuasive Housing Rents, Service Charges and Payments
- Esuasive Housing Arrears Management

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- Esuasive Housing Sales and Lettings
- Esuasive Housing Complaints and Compliments
- Esuasive Housing ASB
- Esuasive Housing Domestic Abuse and Safeguarding
- Esuasive Housing Tenancy Management
- Esuasive Housing Financials

Local Authority customers may also wish to explore:

- Esuasive Dynamics 365 and Power Apps for Local Authorities
- Esuasive Homelessness Application Management and Reporting

Esuasive also supports local authorities and housing associations looking for external professional support and maintenance for existing, in house, legacy Microsoft Dynamics applications, and for those wishing to migrate on premises Dynamics 365 applications to the Microsoft Cloud. These services are provided by Esuasive under G-Cloud 15 Lot 3, Cloud Support. Please see the relevant listing for further details.

Key features

Esuasive Housing is a suite of pre-configured, ready-to-run social housing modules, spanning –

CRM and Customer Service

A complete CRM, contact management and customer service solution designed to exploit all of the capabilities of the Microsoft Dynamics / Power Apps platform, fully integrated with Esuasive's Assets, Repairs, Tenancy Management and Rents and Service Charges solutions, and including –

- Contact Centre: With omnichannel capability built in to handle customer interaction by phone, text, email and social media.
- Pre-configured customer service processes for
 - Complaints and Compliments
 - Domestic Abuse
 - Safeguarding
 - Anti-social Behaviour
 - Financial Wellbeing
 - Resident Engagement
 - Community Investment
 - Customer surveys – triggered (e.g. Repairs follow up) and batch (e.g. Tenant Satisfaction)
- General Enquiries, covering
 - General information requests
 - Freedom of Information requests
 - GDPR Subject Access Requests
 - all kinds of other general enquiries.
- Fully integrated Customer Portal: Enabling customer self-service

Property Asset Management and Repairs

A fully realised housing asset management and repairs solution built on the same Microsoft Dynamics 365 / Power Apps platform as, and fully integrated with, our CRM and Customer Service, Tenancy Management, Sales and Lettings and Rents and Service Charges solutions.

- Property and Component Management: Supporting a four-level Estate-Block-Property-Component hierarchy, and the capability to hold location and asset life cycle information.
- Compliance: Pre-configured processes to drive all common compliance activity including gas safety checks, EICRs, asbestos, damp and mould, legionella, fire doors, radon, etc., with the ability to generate and store certificates.
- Planned and Cyclical Works.
- Stock Condition Surveys.
- Estate Inspections.
- Responsive Repairs: Available as a separate standalone module but included within Property Asset Management. Including job scheduling, job tracking, and integration with Esuasive Housing Financials for works order / PO processing and contractor payments.
- Voids
- Decent Homes and HHRS.

- Section 20.

Rents, Service Charges and Payment

A complete Rents and Service Charges solution to replace the functionality of legacy HMSs. Developed from the ground up on the Microsoft Power Apps platform and built to run in the Microsoft Cloud for scalability, performance and security. Includes:

- Rents Engine, to drive the rent debits process, with flexibility built-in:
 - Allows configuration of Rent Run types ('Rent Groups') on Tenant Rent Accounts to support multiple different rent debit frequencies.
 - Allows loading of detailed charges against a property (used as a basis for a new account post-void) and/or creation of tenancy-specific charges (e.g. rebates) which will not persist through a void or across tenancies.
 - Setup of any Rent Debit schedule as required for a customer, to support any charging frequency and any non-charged periods.
 - Configurable aggregation of charges rolled up to a single debit (account transaction) on the tenant account.
 - Customisable aggregation of charges to support a breakdown of postings to the customer-specific Chart of Account structure - via a pre-configured interface if using Esuasive Housing Financials.
 - Auto adjustments for partial periods when a tenancy starts or ends during a rent debit period.
 - Auto creation of adjustments when a tenancy start or end date is retrospectively changed, including for rent runs already completed.
 - Semi-automated creation of adjustments when changing property or tenancy-specific charges.
 - Manual or automatic scheduling of the Rent Run as required.
 - Optional Funder module to allow precise tracking of the split of debt on an account between tenant, HB/UC or other funding streams.
- Payments module, providing functionality to process payment notice files, including:
 - Customisable processes to load payment files with different formats into a staging area within the system, to support automatic and manual posting to tenant accounts.
 - Automatic matching of payments to a tenancy account via one or more payment references. These references can be different for different payment types.
 - When automatic matching is not successful, payments can be matched manually or left for further review or processed into a Suspense Account.
 - Posting of payment transactions to any customer specific Chart of Account structure
 - With optional Funder module, tracking of payments to allow precise tracking of account balances against each funding stream (e.g. tenant, HB/UC, etc – especially useful with Care or Supported Living tenancies).
 - Manual transfer of payments between accounts if they have been mis-selected, or from a suspense account to the true tenant account.
 - Manual creation of ad hoc payment or adjustment transactions, or in bulk via a standard Excel-based import
- Direct Debits, including AUDDIS integration and bank verification wizard
- Rent and Service Charge Management, covering:
 - Rent setting
 - Service Charge setting and apportionment
 - year-end processes
- Customer statements:
 - Statement of Account report with customer logo included, run by date range for single or multiple selectable accounts and exportable to PDF and other formats.
 - Supports customer-defined transaction types which can have tenant-friendly names for display on statements.
 - Ability to import historical account transaction information from legacy systems.
 - Statements can be made available on Esuasive or other Customer Portal.

Arrears Management

- Flexible auto-creation of arrears cases based on configurable parameters
- Automatic sending of texts and emails
- Configurable letter templates
- A chronological history of interventions, referrals and signposting showing balance at each action date
- Support for Breathing Space guidelines
- Configurable set up of agreements
- Management of Court processes
- Automatic monitoring of agreements
- Process to manage evictions and write-offs, including generation of Court Pack documents

Tenancy Management

- Tenancy Sign-up and End of Tenancy
- Tenancy Changes
 - Joint to Sole
 - Sole to Joint
 - Occupancy
 - Name Change
 - Succession
 - Assignment
 - Mutual Exchange
- Tenancy Visits
- Tenancy Audits
- Tenancy Fraud
- Leasehold Management

Sales and Lettings

- Nominations
- Choice Based Lettings, with interfaces to commonly used third-party CBL systems
- Shared Ownership, including
 - Staircasing
 - Right to Buy
 - Waiting Lists
- Development plots, plot valuation

Financials

- GL, AP, AR, Cashbook and Asset Register
- Budgeting and Forecasting
- Streamlined procure-to-pay process
- Enhanced to align with Grant Thornton Model Accounts for Housing and the Housing SORP
- Built on Microsoft Dynamics 365 Business Central, with Esuasive extensions for SODA, approvals, tolerance handling, commitment accounting, and other housing-specific activity
- Configurable templates for remittance, PO, invoice and other documents
- Integration with Esuasive Property Asset Management
- Integration with Esuasive Responsive Repairs

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- Integration with Esuasive Rents, Service Charges and Payments
- Powerful reporting and analytics using Power BI, Excel and Microsoft AI tools

Benefits

Complete, integrated Housing solution: Spanning Sales and Lettings, CRM and Customer Service, Tenancy Management, Property Asset Management, Repairs, and Financials. Customer (Tenant) and Contractor Portals included as standard.

Proven and fully tested: Designed and developed from the ground up in collaboration with our housing association customers. Fully tested and battle hardened.

Pre-configured and ready to run: Requiring only normal configuration, data migration and user testing prior to go live.

Easily customisable: Delivered as an open solution, meaning both Esuasive and our customers can make changes and enhancements as business needs evolve.

Shorter implementation timeline: Implementation of individual modules can be achieved in a matter of weeks. Implementation of the complete end-to-end Esuasive Housing solution can be completed in months rather than years, as one project or incrementally and at a pace which aligns with the customers wider transformation change objectives.

Increased efficiency: From having all data – contact, tenant, tenancy, asset, repair, etc. data – stored in one place, easily accessible from desk or mobile device by any employee or contractor with permission to do so. And through the implementation of streamlined business process flows which drive team workloads, automate repetitive tasks, ensure consistency and eliminate errors.

Insights: With real-time views of the data available at the click of a mouse, plus all of the capabilities of Excel, Power BI and Microsoft AI tools to manage against KPIs and deliver strategic insights.

Built on the world-class Microsoft Dynamics 365 and Power Apps platform: Runs in the Microsoft Cloud for scalability, performance, and security. Works with Microsoft Office, Teams and other Microsoft products. AI-ready, to exploit powerful AI capabilities coming on stream from Microsoft. Direct integration with SharePoint for secure document management.

Mobile enabled out of the box: On iOS and Android powered mobile phones, tablets and notebooks.

Product roadmap: Esuasive publishes a three-horizon roadmap designed to deliver both regular incremental enhancements and technology-driven innovation.

Esuasive Housing: Implementation

Implementation of Esuasive software is carried out by Esuasive's Professional Services team, working closely and collaboratively with your in-house team to achieve a successful outcome.

Please note, Esuasive offers two styles of implementation:

Adopt: Implementation of standard Esuasive solution functionality.

Adapt: Implementation of the Esuasive solution with customisations to meet specific requirements.

Adopt Implementations

In an Adopt implementation:

Esuasive typically takes responsibility for the following:

- Project management, in conjunction with the customer project manager
- Configuration of system workflows to route activities and/or cases to specified queues / individuals
- Configuration of customer-specific target times / SLAs embedded within the Esuasive solution
- Providing advice on Microsoft and other third-party licensing
- Set up of environments (Dev, Test, Prod)
- Provision of pre-formatted data mapping / data load templates, to be populated by the customer with data to be migrated to the Esuasive solution
- Training for customer
- Esuasive solution
- Deployment of the Esuasive solution through the environments
- Train-the-trainer training on all standard functionality
- Training for customer sysadmins covering managing role/user security
- Training for 'superusers' in how to create / amend email and document templates
- Provision of standard reports, views, charts and dashboards
- Training on how to create, amend or extend reports, views, charts and dashboards
- Support of customer-led module testing, system testing and user testing
- Cutover to Production ('Live')
- Hypercare

The customer team is typically responsible for:

- Customer-side project management
- Data migration, data cleansing, data archiving
- Migration/creation of email and document templates
- User testing
- Customer-side cutover activities
- Decommissioning of redundant systems

Please note that where the implementation project also includes Esuasive Housing Financials, additional Finance-specific work is specified. Please see our detailed G-Cloud 15 listing under Esuasive Housing Financials.

Adapt Implementations

For customers who have specific requirements not supported 'out of the box' by Esuasive, an Adapt implementation may be suitable.

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Adapt implementations typically incorporate all of the implementation project stages and tasks listed under Adopt, above, but will tend to also include some or all of the following:

- Discovery, scoping, roadmapping, phasing
- Detailed requirements definition
- User Design workshops
- Customisation of the Esuasive solution to meet customer-specific and agreed additional requirements and designs, and to deliver these as changes and/or enhancements to the Esuasive core solution.
- Development of non-standard interfaces and/or integrations to other systems or online services
- Development of additional reports, views, charts and dashboards
- Provisioning of additional environments
- Additional training to cover customer-specific changes / enhancements

Post-implementation support and software maintenance

Post-implementation support includes:

- Hypercare: priority-response support in the immediate post go-live period
- Long term support: responsive support in line with Esuasive's standard SLA
- Software maintenance: the provision of Esuasive software updates