

# Housing Management Solution

*Information Strategies (Infostrat) developed the Housing Management system using the Microsoft CRM development platform, which provides scalability, flexibility, and extensibility.*

## BACKGROUND

The mission of county housing commission is to provide affordable housing and supportive services that enhance the lives of low- and moderate-income families and individuals throughout the county. To achieve this mission, HOC operates in three roles, as a public housing agency, a housing finance agency and a housing developer.

## PROBLEM

Montgomery County, Housing Opportunity Commission (MCHOC) identified a need to improve client relationship management. As part of a reorganization and expansion to branch offices at multiple locations, a new system would make it easier to track all interactions with clients.

Some key system requirements include:

- Flexible workflows to allow easy changes as procedures are modified.
- Automation of bulk imports on recertification letters so that recertification tasks and follow-on tasks can be automatically generated.
- Views of tenant, vendor and property information from other systems (such as Yardi)
- Easy receipt configuration to allow recording and printing out.
- Single source of data for all transactions with a client.
- Ability of managers to reassign tasks. Administrators can redefine workflow processes using configuration file, without a need to develop code.

## Solution at a glance

Microsoft CRM based application

## Technologies Involved

Microsoft Dynamics CRM, SQL Server 2005, SQL Reporting Services, Microsoft Office, .NET framework, C#, VB.NET, ASP.NET, Windows Services, JavaScript, XML, XSLT.

Infostrat developed a housing solution that enables the tracking and management of all activities associated with a client to be contained in one central location. The CRM system serves as the central communication piece between clients, staff, and management.

Infostrat created a workflow step generating utility to configure all workflow steps based on a user-supplied spreadsheet. This spreadsheet defines what tasks are to be created when a task is completed. When one task is completed, the next group of tasks is automatically started and assigned. This program can be re-run at any time when workflows need to be changed. The solution also contains a subsystem that allows a recertification file to be used to create tasks to send notification letters to each of these contacts in bulk, show when the letters were sent, and open a new task that waits for the recertification packages to come back.

Because Microsoft CRM offers an Outlook interface, the learning curve for users has been significantly reduced. From tracking all client requests and paperwork status to automating the housing document intensive process, many features are built into the Housing system to simplify the activities associated with housing. These features include:

- Outlook Integration - The Housing workplace is fully integrated with Microsoft Outlook which allows e-mail to be stored with subject and contact information, as well as synchronization of tasks and calendars.
- Everything in One Location - Multiple departments and users can now access all the current information on each client, eliminating having to look in various locations and ensure that all items are documented.
- Automated Workflows - Users can go into tasks and select any of the workflows that are out there and they will automatically run the next steps when the current steps are completed.
- Auditing - Auditing was created and configured so managers have insight into when information was changed, what that information was, and who changed it. The audit system allows configuration and tracking of changes to all data elements.
- System Integration - The Yardi integration allows users to more effectively track communication between HOC personnel and tenants and vendors.

Infostrat's Microsoft Dynamics CRM Housing solution allows state and local governments to meet their service objectives while reducing overall processing costs of client inquiries.

## SOLUTION