CRM Housing and Energy Desk Mechelen

Overview of CRM Fields

Annex to D5.1

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History of Changes

Version	Change made	Date
Version 0.1	Inventory fields	August 18, 2025
Version 0.2	Draft version overview fields	25-08-2025
Version 0.3	Final version Overview fields	September 22, 2025

Introduction

Between 2022 and 2025, the energy house and the city of Mechelen participated in two European LIFE projects: FOSSTER and CondoReno .

The **FOSSTER project** aimed to review, consolidate, and combine existing energy house guidance and support services with best practices from other related projects to create a one-stop-shop model for various types of homeowners. **The CondoReno project** focused on developing one-stop-shop services for apartment co-owners who want to renovate the common areas of the apartment complex.

Since these one-stop-shop services for homes and apartments are provided by the same energy house, the internal tools for monitoring these services are integrated into a single CRM system. Therefore, the CRM system redesign was fueled and driven by both LIFE projects.

By using a CRM system correctly and consistently, the energy company can streamline customer journey tracking, simplify reporting, and better respond to customer needs and policy objectives.

It's best to read this memo in conjunction with the CRM manual. This will give you a comprehensive overview of the CRM system as it's developed.

This memo provides an overview of the fields used in the CRM system. The fields are displayed by section in the system's left-hand navigation:

- General information: addresses, organizations, contact persons, works
- Climate dossiers type: information, advice, project preparation, implementation
- Deep dive climate file renovation master plan

As in the manual, the following components of the CRM system are not included in this memo:

- the file types 'Applications and loans', 'Loans', 'Bonuses and subsidies'
- the personalization options for dashboards and file views
- the CRM administrative functionalities
- the connection between the CRM and PowerBI for data analysis and reporting.

If you are interested in these features or would like a demo of the CRM system, please contact the energy house and the city of Mechelen at woon-en-energieloket@mechelen.be .

Contents

1. General information

1.1 Addresses

TAB	FRAME	FIELD
General	Address information	• Manual address (checkbox) • Country • Local authority • Postal code • Street • House number • Postbox number • Comment(s) (open text field)

	Type	• Property type (selection list)
		  • Single-family home
		  • Apartment building
		  • Commercial property
		  • Apartment with commercial property
		  • Co-housing
		  • Other (free field)
		• Building type (selection list)
		  • Closed
		  • Semi-open
		  • Open

	Additional information	*(conditional with apartment building option):*
		• Number of residential units (open text field)
		• Number of other units (open text field)
		• Number of floors (open text field)
		• Unique/multiple buildings (selection list)
		  • Unique building
		  • Multiple buildings
		• Typology (selection list):
		  • 50+ residential units
		  • 15-50 residential units high-rise
		  • 15-50 residential units low-rise
		  • 7-14 residential units high-rise
		  • 7-14 residential units low-rise
		  • 2-6 residential units
		• Linking to VME (adding an account)
		• Collective heating (selection list):
		  • Yes
		  • No
		• Linking to apartments (adding additional addresses)

	Building info	• Year of construction (open text field)

		• Construction period (selection list):
		  • 1920
		  • 1921-1945
		  • 1946-1970
		  • 1971-1985
		  • 1986-1995
		  • 1996-2005
		  • 2006-2020
		  • After 2020
		• Building conditions (selection list)
		  • Select All
		  • Identified architectural heritage
		  • Protected architectural heritage
		  • Protected cityscape
		  • CHE area
		  • Unitary buildings
		  • Category 3
		• CEVI number(s) (internalnumbersvergunning.net) *(open text field)*
		• OMV project number building permit (open text field)
		• Declared uninhabitable start date (date field)
		• Declared uninhabitable end date (date field)
		• Usable floor area (open text field)
		• Heating type (selection list):
		  • Natural gas
		  • Electric (non-heat pump)
		  • Wood or pellets
		  • Heat pump
		  • Heating oil

	Plot	Plot number
	Energy EPC/EPB *Energy data to be filled in via +Create EPC address (see below)	(grid) • Date format • Address • EPC • Type • E-level • kWh/m2 • Common areas (yes/no) • Owner
Dossiers H&E	Files linked as a recruitment address Files linked as additional address	(grid) • File number • Subfile number • File type • File subtype • Customer journey • Customer journey phase • Site address (Customer journey) • Main Contact Person (Customer journey)

		• Email (Main contact person) • Mobile phone number (Main contact person)
Energy	Consumption per meter at this address	(grid) • Meter description • EAN code electricity • EAN code gas • Water meter code • Protected customer (yes/no)
	Consumption (with or without meter) linked to this address	(grid) • Type of consumption • Utility meter • Additional information meter • Year of measurement • Annual electricity consumption • Annual gas consumption • Annual water consumption
To work	Linked works	(grid) • Type of work • Subtype of work • Contractor • Date of quotation request • Date (planned) start • Date end of works • Invested budget • Premium application • Date of premium application
Contacts	Active contacts	(grid) • Full name • Capacity • Function • Organization

* ENERGY
(can be created via three dots – "+Create EPC Address")

TAB	FRAME	FIELD

EPC Address	General	• Address
		• EPC (energy label selection list)
		• Type
		  • EPC
		  • EPB
		• Calculation method
		  • Real
		  • Estimated
		• E-level
		• kWh/m2

		• Common areas:
		  • Yes
		  • No
		• Date format

1.2 Organisations

TAB	FRAME	FIELD
General information	Account details	• Organization • Nature of association/company (W&E) (possibility to complete the list yourself) • E-mail • Telephone • Mobile phone • Website • Description
	Address details	• Address (primary) (possibility to add multiple addresses)
	Company details	• Legal form • Company number • VAT number • IBAN
	Timeline	Search bar Enter a note freely
Those involved	Select the primary stakeholder from the list of related stakeholders	Selection menu
	Related parties	(grid) • Name • Type of person involved • Email (Contact Person) • Mobile (Contact Person)
Files	Files as involved party	(grid) • Name • Type of person involved • Climate dossier • File type (Climate file) • Dossier subtype (Climate dossier) • Dossier handler (service) (Climate file) • Main contact person (Climate file)

1.3 Contact persons

TAB	FRAME	FIELD
General	Info	• First name • Surname • Organization • E-mail • Email address 2 • Mobile phone • Telephone • Address (domicile)
	Site addresses (may have multiple addresses)	(grid) • Name • Postal code • City • Street • Phone number
	Linked climate dossiers	(grid) • Climate dossier • Dossier status (Climate dossier) • Dossier type (Climate dossier) • Dossier subtype (Climate dossier)

	Details	• Marital status
		  ○ Married
		  ○ Single
		  ○ Divorced
		  ○ Widow/widower

	Marketing info	• General newsletter (yes – no) • Apartment newsletter (yes – no)
	Timeline	Search bar Enter a note freely
Files	Actively involved in files	(grid) • Climate dossier • File number (Climate file) • Dossier subtype (Climate dossier) • Site address (Climate file) • Type of person involved

1.4 Works

Types of works that can be added:

PREPARATORY STUDIES/WORKS: • Heat loss calculation • Thermal bridge analysis and risk of condensation and mold • EPC/EPB format • Stability study • Safety coordination • Inspection certificate - boiler • Inspection certificate - ventilation • Inspection certificate - lift • Architect • Asbestos inventory • Fire safety analysis	**LIVING QUALITY:** • Asbestos removal • Damp treatment - rising damp • Moisture treatment - rain penetration • Moisture treatment - water infiltration • Electricity • Sanitary • Interior renovation • Acoustic sound insulation • Fire safety • Accessibility • Wastewater disposal - drainage pipes • Disposal of grey and black wastewater - sewerage and septic tank	**BUILDING SHELL:** • Roof - flat • Roof - sloping • Roof - attic • Floor • Exterior wall - outside • Exterior wall - interior • Exterior wall - cavity • Windows and doors • Sun protection • Stability works • Concrete rot treatment • Elevation • Planking
TECHNIQUES: • Heating - gas condensing boiler • Heating - boiler room optimization • Heating - heat pump • Heating - calorie counters • Sanitary hot water - solar boiler • Sanitary hot water - heat pump boiler • Sanitary hot water - renewal of supply and discharge pipes • Sanitary hot water - installation of intermediate meters • Ventilation • Solar panels • Home battery • Charging station for electric cars and bicycles	**WATER MANAGEMENT/ADAPTATION** • Rainwater recovery • Rainwater infiltration • Green roof • Blue roof • De-paving	

TAB	FRAME	FIELD
Work	Type of work	• Address • Customer journey • Type of work • Subtype of work • Estimated budget (incl. VAT) • Follow-up of housing and energy desk (yes – no)

	Apartment	• Work Advice Study Agency (yes – no)
		• Common areas (yes – no)
		• Individual areas (yes – no)
		• Priority (click field)
		  • Short term
		  • 5-10 years
		  • +10 years
		• Decision AV (yes – no)

	Project design /Preparation	• Requested a quote? (click field) • yes/no/by citizen • Date of quotation request • Date received quotation • Contractor: *look-up field account* + contact person within account • Contractor check date • Quotation in accordance with premium conditions (yes – no)
	Comments on quotation	Free field to fill in
Decision/implementation	Decision	• Quote Approved? (yes - no) • Date quote approved (month/year)
	Comments on decision	Free field to fill in

	Execution	• Execution by
		  • Contractor
		  • Do-it-yourself
		• Date (planned) start
		• Request for occupation of public domain (yes/no)
		• Invested budget (open field)
		• Advance invoice received (yes/no)
		• Final invoice received (yes/no)
		• Final invoice date

	Execution comments	Free field to fill in

Aftercare	Aftercare	• Premium application
		  • Yes
		  • No
		  • By citizen
		• Premium applicant
		  • W&E counter
		  • By citizen
		  • By syndic
		• Loan
		• Awarded premium amount
		• Disabled dependent
		  • Yes
		  ▪ (if yes: number (numeric field)
		  • No (default option)
		• Contractor certificate (yes/no/n/a)
		• Inspection certificate (yes/no/n/a) (for gas condensing boiler and electrical installation)
		• Photo European label (yes/no/n/a) (for gas condensing boiler)
		• Photos before and after the work (yes/no/n/a) (for exterior joinery)
		• Date of premium application
		• Premium file number
		• Date of award of premium

	Aftercare comments	Free field to fill in
	Reporting	• Saving kWh • Yield kWh • Saving tCO2
Working at the same address	Work linked to site address	(grid) • Type of work • Subtype of work • Contractor • Contractor's certificate • Date received quotation • Date (planned) start • Final invoice date • Premium application • Date of premium application • Invested budget • Do you need an environmental permit? (Implementation file)
	Decided works linked to site address	(grid) • Type of work • Subtype of work • Contractor

		• Contractor's certificate • Date received quotation • Date (planned) start • Final invoice date • Premium application • Date of premium application • Invested budget • Do you need an environmental permit? (Implementation file)
Files		

2. Types of Climate Dossiers

2.1 Information

Business Process Flow: Request > In Process > Completed

TAB	FRAME	FIELD
File information	File info	
		• File number • File subtype • Customer journey phase (automatically filled in - selection list: *information, preparation, implementation plan, execution, aftercare)* • Date of application • Source (selection list*: Contact form, Email, Telephone, Physical counter, Digital counter, Event, External services, Post, Renovation mobile, Other service, Social House)* • Introductory offer (selection list: *website, social media, newsletter, printed matter, word of mouth, event, counter, other (free field))* • Event
	Projects	*(possibility to add one project name here)*
	Additional projects	(grid) • Name • Project Manager
	Timeline	
Contact details	Contacts	• Main contact person (to be selected from entered additional contact persons) • Additional contacts (grid) • Type of person involved • Name • Organization • E-mail • Mobile phone number • Telephone number
	Shipyard addresses	• Site address (link to building register) • Type of home • Different residential address (yes – no)
	Additional addresses	(grid) • Type of home • Name

		• Country • Postal code • City (lookup) • Street (lookup) • House number • Postbox number
		If apartment: • Common areas • Private areas • Common and private areas
Customer journey	Use the "Customer Journey" to create a new step	• Customer journey • Advice • Project design • Execution
	Files linked to site address	(grid) • File number • Subfile number • File type • File subtype • Customer journey • Customer journey phase • Site address (Customer journey) • Main Contact Person (Customer journey) • Email (Main contact person) • Mobile phone number (Main contact person)

Application	(Type) Question	• Other
		• Energy sharing
		  • Solar panels on rental property
		  • Solar panels on apartment
		• Energy bill
		  • V-test/Switch Desk
		• Loan
		  • My Home Improvement Loan
		  • Other financing
		• De-paving and greening
		• Premiums & subsidies
		  • Adjustment bonus
		  • Other
		  • EPC label premium
		  • Master plan study
		  • My Renovation Premium
		• Renovation advice
		  • Contractors' collective
		  • Check your boiler
		  • EPC+
		  • MVB
		  • Plan of approach
		  • Renovation master plan

		• Heat map • Building passport • Solar map • Sundial
	Answer	*Free text field*

	Management	• Date of first information request
		• Action
		  ○ Other
		  ○ Documents sent
		  ○ Mail sent
		  ○ Called
		  ○ Called and sent email
		  ○ Physical counter
		• Date first action
		• Lead time

	Redirection	• Product (climate dossier)
		  ○ Loan
		  ○ Premium
		  ○ Advice
		  ○ Other
		• Organization

Files		

Related		*(when consulting, a link is provided to a view with the relevant information)*
		• Related – General
		  ○ Activities
		  ○ Documents
		  ○ Control history
		  ○ Climate files
		  ○ Categories (W&E)
		  ○ Climate question type
		• Related – Process Sessions
		  ○ Background processes

2.2 Advice

Business Process Flow: Request > Advice > Customer Survey > Completed

TAB	FRAME	FIELD

File information	File info	• File number
		• File subtype (flexible*, option to add subtypes)*
		  • Borrow an energy meter
		  • Request a paved garden (individual)
		  • Request a paved garden (collective)

		• Request a plant garland • Request street garden adoption • Request a rubble bag • De-paving team • Customer journey phase (selection list: *information, preparation, implementation plan, execution, aftercare)* • Date of application • Source (selection list: *Contact form, Email, Telephone, Physical counter, Digital counter, Event, External services, Post, Renovation mobile, Other service, Social House)* • Introductory offer (selection list: *website, social media, newsletter, printed matter, word of mouth, event, counter, other (free field))* • Event • Project *(project as a separate entity - flexible)* • Housing and energy desk • BE REEL (ask Ranja) • CONDORENO • Energy sharing (ask Bart) • Tandems • Neighborhood improvement - Healthy indoor climate • Nekkerspoel neighborhood renovation • Additional projects (grid)
	Timeline	*(common for linked files "advice – implementation plan – implementation")*
Contact details	Contacts	• Main contact person • Additional contacts (grid) ▪ Type of person involved ▪ Name ▪ Organization ▪ E-mail ▪ Mobile phone number ▪ Telephone number
	Construction site address	• Construction site address. Type of property
	Additional addresses	(grid) option: *Add existing address*
Customer journey	Use the "Customer Journey" to create a new step	• Customer journey • Advice • Project design • Execution

	Files linked to site address	(grid) • File number • Subfile number • File type • File subtype • Customer journey • Customer journey phase • Site address (Customer journey) • Main Contact Person (Customer journey) • Email (Main contact person) • Mobile phone number (Main contact person)

Application	Check / details	• Target audience
		• Income level (selection list: DG1 - highest/DG2 - middle/DG3 - lowest/DG4/DG5)
		• My Renovation Guidance
		• Date of purchase of home
		• Renovation obligation (yes – no)
		• Apartment
		  ○ Working on common areas
		  ○ Working on individual areas
		  ○ Working on commons and individual areas
		• Architect
		  ○ No
		  ○ Yes
		• Architectural firm
		• Admissibility (yes – no)

	Allocation	• Organization • Contact person
Advice	Preparation advice	• Asbestos certificate in file (yes – no)
	Work linked to site address	(grid) • Type of work • Subtype of work • Contractor • Contractor's certificate • Date received quotation • Date (planned) start • Final invoice date • Premium application • Date of premium application • Invested budget • Do you need an environmental permit? (Implementation file)
	Decided works linked to site address	(grid) • Type of work • Subtype of work

		• Contractor • Contractor's certificate • Date received quotation • Date (planned) start • Final invoice date • Premium application • Date of premium application • Invested budget • Do you need an environmental permit? (Implementation file)
	Advice	• Date of signing of the agreement (MVB) • Date of advice • Lead time (days) *(automatic calculation of advice date - request date)* • Date of report
	Discussed topics	• Basic renovation (yes/no) • Heat pump advice (yes/no) • Adaptation (yes/no) • Circularity (yes/no) • Asbestos (yes/no) • Asbestos info (free text field)

	Decision	• Advice is ahead of AV (apartments)
		• Decision on quotation request works
		  ○ Yes
		  ○ No
		  ○ Maybe
		• Decision on quotation request studies
		  ○ Yes
		  ○ No
		  ○ Maybe
		• Assistance with quotation request (yes – no)
		• Motivation for customer to stop the process
		  ○ Too expensive
		  ○ Too complicated
		  ○ Not convinced enough
		  ○ Bad time
		  ○ Put off by administration
		  ○ Otherwise
		• Motivation of the dossier handler to stop process (open text field)

Customer survey	Owner	• Owner feedback
		  ○ No customer survey required
		  ○ No feedback received yet
		  ○ Receive feedback
		• Date customer survey sent
		• Date customer survey completed
		• Storyteller (yes/no)
		• Publication website (anonymous/yes/no)

	Architect	• Feedback architect
		  ○ No customer survey required
		  ○ No feedback received yet
		  ○ Receive feedback
		• Date customer survey sent
		• Date customer survey completed
		• Storyteller (yes/no)
		• Publication website (anonymous/yes/no)

	VME	• Feedback VME
		  ○ No customer survey required
		  ○ No feedback received yet
		  ○ Receive feedback
		• Date customer survey sent
		• Date customer survey completed
		• Storyteller (yes/no)
		• Publication website (anonymous/yes/no)

	Study office	• Feedback study agency
		  ○ No customer survey required
		  ○ No feedback received yet
		  ○ Receive feedback
		• Date inquiry sent to study agency
		• Date of inquiry completed by the study agency
		• Storyteller (yes/no)
		• Publication website (anonymous/yes/no)

	Syndic	• Feedback from the syndic
		  ○ No customer survey required
		  ○ No feedback received yet
		  ○ Receive feedback
		• Date syndic inquiry sent
		• Date of syndic inquiry completed
		• Storyteller (yes/no)
		• Publication website (anonymous/yes/no)

Files		
Financial follow-up		*(not yet developed)*

Related		*(when consulting, a link is provided to a view with the relevant information)*
		
		• Related general
		  ○ Activities
		  ○ Control history
		  ○ Climate files
		• Related process sessions
		  ○ Background processes

2.3 Project design

Business Process Flow: Request > Additional Studies > Request for Quotation > Completed

TAB	FRAME	FIELD

File information	File info	• File number
		• File subtype (flexible, *option to add subtypes)*
		• Collective renovation – request a quote
		• My Renovation Guidance
		• Customer journey phase (selection list: *information, preparation, implementation plan, execution, aftercare)*
		• Date of application
		• Source (selection list: *Contact form, Email, Telephone, Physical counter, Digital counter, Event, External services, Post, Renovation mobile, Other service, Social House)*
		• Introductory offer (selection list: *website, social media, newsletter, printed matter, word of mouth, event, counter, other (free field))*
		• Event
		• Project *(project as a separate entity - flexible)*
		  • Housing and energy desk
		  • BE REEL (ask Ranja)
		  • CONDORENO
		  • Energy sharing (ask Bart)
		  • Tandems
		  • Neighborhood improvement - Healthy indoor climate
		  • Nekkerspoel neighborhood renovation
		  • Additional projects (grid)

	Timeline	*(common for linked files "advice – implementation plan – implementation")*

Contact details	Contacts	• Main contact person
		• Additional contacts (grid)
		  ▪ Type of person involved
		  ▪ Name
		  ▪ Organization
		  ▪ E-mail
		  ▪ Mobile phone number
		  ▪ Telephone

	Construction site address.	Construction site address. Type of property Different residential address (yes – no)
	Additional addresses	(grid) option: *Add existing address*

Customer journey	Use the "Customer Journey" to create a new step	• Customer journey • Advice • Project design • Execution
	Files linked to site address	(grid) • File number • Subfile number • File type • File subtype • Customer journey • Customer journey phase • Site address (Customer journey) • Main Contact Person (Customer journey) • Email (Main contact person) • Mobile phone number (Main contact person)
Preparation	Request for quotation	• Asbestos certificate in file (yes – no)
	Work linked to site address	(grid) • Type of work • Subtype of work • Contractor • Contractor's certificate • Date received quotation • Date (planned) start • Final invoice date • Premium application • Date of premium application • Invested budget • Do you need an environmental permit? (Implementation file)
	Decided works linked to site address	(grid) • Type of work • Subtype of work • Contractor • Contractor's certificate • Date received quotation • Date (planned) start • Final invoice date • Premium application • Date of premium application • Invested budget • Do you need an environmental permit? (Implementation file)

	Decision	• Decision on implementation of study
		  • No
		  • Yes

		• Decision on execution of works (yes/no)
		  • No
		  • Yes
		• Supervision of work execution (yes/no)
		  • No
		  • Yes

Files		*(same as "advice" file)*
Related files		*(same as "advice" file)*

2.4 Execution

Business Process Flow: Request > Preparation > Execution > Customer Survey > Completed

TAB	FRAME	FIELD

File information	File info	• File number
		• File subtype (flexible, *option to add subtypes)*
		  • Borrow an energy meter
		  • Request a tiled garden (individual)
		  • Request a tile garden (collective)
		  • Request a Green Garland
		  • Request street garden adoption
		  • Request a rubble bag
		  • De-hardening team
		• Customer journey phase (selection list: *information, preparation, implementation plan, execution, aftercare)*
		• Date of application
		• Source (selection list: *Contact form, Email, Telephone, Physical counter, Digital counter, Event, External services, Post, Renovation mobile, Other service, Social House)*
		• Introductory offer (selection list: *website, social media, newsletter, printed matter, word of mouth, event, counter, other (free field))*
		• Event
		• Project *(project as a separate entity - flexible)*
		  • Housing and energy desk
		  • BE REEL (ask Ranja)
		  • CONDORENO
		  • Energy sharing (ask Bart)
		  • Tandems
		  • Neighborhood improvement – Healthy indoor climate
		  • Nekkerspoel neighborhood renovation
		  • Additional projects (grid)

	Timeline	*(common for linked files "advice – implementation plan – implementation")*
Contact details	Contacts	• Main contact person • Additional contacts (grid) ▪ Type of person involved ▪ Name ▪ Organization ▪ E-mail ▪ Mobile phone number ▪ Telephone
	Construction site address.	Construction site address. Type of home Different residential address (yes – no)
	Additional addresses	(grid) option: *Add existing address*
Customer journey	Use the "Customer Journey" to create a new step	• Customer journey • Advice • Project design • Execution
	Files linked to site address	(grid) • File number • Subfile number • File type • File subtype • Customer journey • Customer journey phase • Site address (Customer journey) • Main Contact Person (Customer journey) • Email (Main contact person) • Mobile phone number (Main contact person)
Preparation	Permit	• Is an environmental permit required? (yes – no) • Building conditions *(automatically filled in from building data - addresses)* • Permit comments (free text field) • Date format • Comments formatting (free text field) • Date of application Flemish environmental desk • Project number (text field) • Fully explained • No • Yes • Comments on request (free text field) • Date of approval • Start date of work entered in the counter • No • Yes

		• Comments approval (free text field)
	Street furniture	• Do you need traffic signs? (yes/no) • Date of removal of traffic signs • Do you need a public lighting system? (yes/no) • Date of removal of public lighting installation • Other? (yes/no) • Comments on street furniture (free *text field)*
Execution	Quotations (based on works)	*(Overview of the works from the linked file "quotation phase" but only show works in the "implementation phase".)* Works linked to site address (grid) • Type of work • Subtype of work • Contractor • Date received quotation • Date (planned) start • Final invoice date • Premium application • Date of premium application • Invested budget • Environmental permit required Decided works linked to site address (grid) *(fields = idem)*

Customer survey	Owner	• Owner feedback
		• Date customer survey sent
		• Date customer survey completed
		• Storyteller
		  ○ No
		  ○ Yes
		• Publication website (anonymous/yes/no)

Files		*(same as "advice" file)*

Related files		• Related – General
		  ○ Control history
		  ○ Climate files
		  ○ To work
		• Related – Process Sessions
		  ○ Background processes

3. File subtype Renovation Master Plan

3.1 Information – subtype: Interest Renovation Master Plan

Status bar: Request > Processing > Completed

TAB	FRAME	FIELD
File information	Type of information request	
	File info	• File number • File subtype • Customer journey phase (automatically filled in - selection list: *information, preparation, implementation plan, execution, aftercare)* • Date of application • Source (selection list: *Contact form, Email, Telephone, Physical counter, Digital counter, Event, External services, Post, Renovation mobile, Other service, Social House)* • Introductory offer (selection list: *website, social media, newsletter, printed matter, word of mouth, event, counter, other (free field))* • Event
	Projects	*(possibility to add one project name here)*
	Additional projects	(grid) • Name • Project Manager
	Timeline	

Contact details	Contacts	• Main contact person (to be selected from entered additional contact persons)
		• Additional contacts (grid)
		  • Type of person involved
		  • Name
		  • Organization
		  • E-mail
		  • Mobile phone number
		  • Telephone

	Shipyard addresses	• Site address *(link to building register)* • Property type *(automatically filled in from address record)* • Different residential address (yes – no)

	Additional addresses	(grid) • Type of home • Name • Country • Postal code • City (lookup) • Street (lookup) • House number • Postbox number
		If apartment: • Common areas • Private areas • Common and private areas

Customer journey	Use the "Customer Journey" to create a new step	• Customer journey
		  ○ Advice
		  ○ Project design
		  ○ Execution

	Files linked to site address	(grid) • File number • Subfile number • File type • File subtype • Customer journey • Customer journey phase • Site address (Customer journey) • Main Contact Person (Customer journey) • Email (Main contact person) • Mobile phone number (Main contact person) • Telephone (Main contact person) • Project • Handler • Date of application

RMP Application	(Type) Question	• Other
		• Energy sharing
		  • Solar panels on rental property
		  • Solar panels on apartment
		• Energy bill
		  • V-test/Switch Desk
		• Loan
		  • My Home Improvement Loan
		  • Other financing
		• De-paving and greening
		• Premiums & subsidies
		  • Adjustment bonus
		  • Other
		  • EPC label premium
		  • Master plan study
		  • My Renovation Premium

		• Renovation advice
		  • Contractors' collective
		  • Check your boiler
		  • EPC+
		  • MVB
		  • Plan of approach
		  • Renovation master plan
		  • Heat map
		  • Building passport
		  • Solar map
		  • Sundial

	Type of question	Free *text field*
	My Renovation Guidance	Free text field
	Answer	*Free text field*
	RMP Timeline	*(overview of activities in RMP trajectory)* (grid) • Date • Phase RMP • Activity RMP • Location • Documentation available • Number of participants • Activity status • Additional information (the timeline contains 4 pre-defined activities) • Intake interview with syndic • Intake interview RME / working group • RMP documents delivered • Information session RME
Files		

Related		*(when consulting, a link is provided to a view with the relevant information)*
		• Related – General
		  ○ Activities
		  ○ Documents
		  ○ Control history
		  ○ Climate files
		  ○ Categories (W&E)
		  ○ Climate question type
		• Related – Process Sessions
		  ○ Background processes

3.2 Advice – subtype: Renovation Master Plan

Business Process Flow: Request – Advice – Customer Survey – Completed

TAB	FRAME	FIELD
File information	File info	• File number • File subtype • Customer journey phase (automatically filled in - selection list: *information, preparation, implementation plan, execution, aftercare)* • Date of application • Source (selection list: *Contact form, Email, Telephone, Physical counter, Digital counter, Event, External services, Post, Renovation mobile, Other service, Social House)* • Introductory offer (selection list: *website, social media, newsletter, printed matter, word of mouth, event, counter, other (free field)* • Current file is start of customer journey (yes/no) • Event
	Projects	*(possibility to add one project name here)*
	Additional projects	(grid) • Name • Project Manager
	Timeline	

Contact details	Contacts	• Main contact person (to be selected from entered additional contact persons)
		• Additional contacts (grid)
		  • Type of person involved
		  • Name
		  • Organization
		  • E-mail
		  • Mobile phone number
		  • Telephone

	Shipyard addresses	• Site address *(link to building register)* • Property type *(automatically filled in from address record)* • Different residential address (yes – no)
	Additional addresses	(grid) • Type of home • Name *(= full address)* • Country • Postal code • City (lookup)

		• Street (lookup) • House number • Postbox number
		If apartment: • Common areas • Private areas • Common and private areas

Customer journey	Use the "Customer Journey" to create a new step	• Customer journey *(number filled in automatically)*
		• Current file is start of customer journey (yes/no)
		• Overview of file numbers per file type
		  ○ Advice
		  ○ Project design
		  ○ Execution

	Files linked to site address	(grid) • File number • Subfile number • File type • File subtype • Customer journey • Customer journey phase • Site address (Customer journey) • Main Contact Person (Customer Journey) • Email (Main contact person) • Mobile phone number (Main contact person) • Telephone (Main contact person) • Project • Handler • Date of application
RMP trajectory timeline		(grid) • Date • Phase RMP • Activity RMP • Location • Document Available • Number of participants • Activity status • Additional information The timeline contains the following pre-defined tasks:

RMP Application	(Type) Question	• Other
		• Energy sharing
		  • Solar panels on rental property
		  • Solar panels on apartment
		• Energy bill

		• V-test/Switch Desk
		• Loan
		  • My Home Improvement Loan
		  • Other financing
		• De-paving and greening
		• Premiums & subsidies
		  • Adjustment premium
		  • Other
		  • EPC label premium
		  • Master plan study
		  • My Renovation Premium
		• Renovation advice
		  • Contractors' collective
		  • Check your boiler
		  • EPC+
		  • MVB
		  • Plan of approach
		  • Renovation master plan
		  • Heat map
		  • Home passport
		  • Solar map
		  • Sundial

	Type of question	Free text field
	My Renovation Guidance	Free text field
	Answer	Free text field
	RMP Timeline	*(overview of activities in RMP trajectory)* (grid) • Date • Phase RMP • Activity RMP • Location • Documentation available • Number of participants • Activity status • Additional information (the timeline contains 4 pre-defined activities) **1. RMP decision** 1.1 Explanation AV 1.2 Received declaration of commitment **2. RMP Application** 2.1 Consultation of the RMP application file 2.2 Construction plans and energy consumption submitted (date field) 2.3 Application submitted 2.4 Receive basic file 2.5 Receiving quotes

		2.6 Awarding of RMP contract 2.7 Signing of contract **3. Formatting RMP** 3.01 RMP Kick-Off Meeting 3.02 Site visit 3.03 Owner survey opened 3.04 Owner survey closed 3.05 Owner survey results forwarded 3.06 Discussion of condition status measurement 3.07 Discussion of the MJOP 3.08 Discussion of renovation scenarios 3.09 RMP feedback passed on 3.10 Explanation of financial simulation 3.11 Final RMP received 3.12 Preparing for the RMP information session 3.13 Explanation of RMP at information session 3.14 Explanation RMP on (B)AV 3.15 Report (B)AV received **4. Financial situation** 4.1 Explanation of financial simulation to RME (date field) 4.2 Explanation of financial simulation on (B)AV (date field)
Decision & Application RMP	Application form	• Maintenance history (free text field) • Overview of deficiencies and needs (free text field) • Overview of collective and/or private works (free text field) • Ambition renovation (free text field) • EPC common areas (yes/no) • EPC private areas (yes/no) • Maintenance contracts (yes/no) • Maintenance contracts (free text field) • Inspection certificates (yes/no) • Inspection certificates (free text field) • Other studies (yes/no) • Other studies (free text field) • Other documents (yes/no) • Other documents (free text field) • Notes request (free text field)
	Award	• Received quotations RMP (free text field) • Award to (choice of records Organizations) • Award date (date field) • Award amount (incl. VAT) (free text field) • Contribution VEKA (free text field) • Contribution VME (free text field) • Invoice start RMP (free text field)

		• Invoice delivery RMP (free text field) • Final invoice explanation AV (free text field) • Received contract from VME study agency (yes/no) • Award notes (free text field)
	Declaration of Engagement	• Declaration of commitment delivered (yes/no) • AV report received (yes/no)
	Construction plans	• Building plans requested (yes/no) • Construction plans received (date field) • Urban planning information retrieved (date field)
	Energy consumption	Fluvius power of attorney requested (yes/no) Received Fluvius power of attorney (yes/no) Energy consumption requested (date field) Receive energy consumption (date field)
	Timeline	*(Overview of activities in this part of the RMP process)* (grid) • Date • Phase RMP • Activity RMP • Location • Documentation available • Number of participants • Activity status • Additional information (the timeline contains 4 pre-defined activities) **1. RMP decision** 1.1 Explanation AV 1.1 Received declaration of commitment **2. Application for RMP** 2.1 Consultation of the RMP application file 2.2 Construction plans and energy consumption submitted (date field) 2.3 Application submitted 2.4 Receive basic file 2.5 Receiving quotes 2.6 Awarding of RMP contract 2.7 Signing of contract
Formatting RMP	Owner survey	• Owner survey prepared (yes/no) • Photo of building requested (yes/no) • Poster created (yes/no) • Owner survey and poster delivered to syndic (date field)
	RMP parts	• Condition report received (yes/no)

		• MJOP received (yes/no) • proposal for renovation scenarios (yes/no) • RMP assessed (yes/no) • Final RMP received (yes/no)

	AV Preparation	• Points of interest AV (free text field)
		• Proposal for a decision by the General Assembly (free text field)
		• Notes on AV preparation (free text field)
		• Working common areas (grid)
		  ○ Type of work
		  ○ Subtype of work
		  ○ Decision AV
		  ○ Quotation approved
		  ○ Priority
		  ○ Estimated budget (incl. VAT)
		• Working private parts (grid, ditto fields)

	Timeline	*(overview of activities in RMP trajectory)* (grid) • Date • Phase RMP • Activity RMP • Location • Documentation available • Number of participants • Activity status • Additional information (the timeline contains pre-defined activities) **3. Formatting RMP** 3.01 RMP Kick-Off Meeting 3.02 Site visit 3.03 Owner survey opened 3.04 Owner survey closed 3.05 Owner survey results forwarded 3.06 Discussion of condition status measurement 3.07 Discussion of the MJOP 3.08 Discussion of renovation scenarios 3.09 RMP feedback passed on 3.10 Explanation of financial simulation 3.11 Final RMP received 3.12 Preparing for the RMP information session 3.13 Explanation of RMP at information session 3.14 Explanation RMP on (B)AV 3.15 Report (B)AV received
Financing RMP	Financial simulation	• Financial simulation template provided (yes/no)

		• Estimate of measures received (yes/no) • Most common lot (free text field) • Starting simulation most common lot (yes/no) • Version AV most common lot (yes/no) • Quotations for matrix (free text field) • Start version simulation matrix quotas (yes/no) • Version AV simulation matrix quotas (yes/no) • Financing notes (free text field)
	Timeline	*(overview of activities in RMP trajectory)* (grid) • Date • Phase RMP • Activity RMP • Location • Documentation available • Number of participants • Activity status • Additional information (the timeline contains pre-defined activities) **4. Financial situation** 4.1 Explanation of financial simulation to RME (date field) 4.2 Explanation of financial simulation on (B)AV (date field)

Customer survey	Owner	• Owner Feedback (dropdown list)
		  ○ No customer survey required
		  ○ No feedback received yet
		  ○ Receive feedback
		• Date customer survey sent (date field)
		• Date customer survey entered (date field)
		• Storyteller (yes/no)
		• Publication website (anonymous/yes/no)

	VME	• Owner Feedback (dropdown list)
		  ○ No customer survey required
		  ○ No feedback received yet
		  ○ Receive feedback
		• Date customer survey sent (date field)
		• Date customer survey entered (date field)
		• Storyteller (yes/no)
		• Publication website (anonymous/yes/no)

	Syndic	• Owner Feedback (dropdown list)
		  ○ No customer survey required
		  ○ No feedback received yet
		  ○ Receive feedback
		• Date customer survey sent (date field)

		• Date customer survey entered (date field) • Storyteller (yes/no) • Publication website (anonymous/yes/no)

	Architect	• Owner Feedback (dropdown list)
		  ○ No customer survey required
		  ○ No feedback received yet
		  ○ Receive feedback
		• Date customer survey sent (date field)
		• Date customer survey entered (date field)
		• Storyteller (yes/no)
		• Publication website (anonymous/yes/no)

	Study office	• Owner Feedback (dropdown list)
		  ○ No customer survey required
		  ○ No feedback received yet
		  ○ Receive feedback
		• Date customer survey sent (date field)
		• Date customer survey entered (date field)
		• Storyteller (yes/no)
		• Publication website (anonymous/yes/no)

Files		
Financial follow-up		(not yet developed)

Related		*(when consulting, a link is provided to a view with the relevant information)*
		• Related – General
		  ○ Activities
		  ○ Control history
		  ○ Climate files
		• Related – Process Sessions
		  ○ Background processes