Hollins & Tate PROPERTY

TECH GUIDE

Rollout

Tenant portal rollout for managers

Property managers, coordinators and the finance clerk at Hollins & Tate Property

Version 1.0 Date 6 Nov 2026 Owner Hollins & Tate Lettings

The tenant portal replaces the paper rent book and most repair calls. This guide says who sees what, how the five-week rollout runs and what can go wrong.

At a glance

- **5 weeks** from setup to the end of the paper rent book.
- **412 homes** in 7 buildings. A pilot of 102 homes in 2 buildings goes first.
- **6 in 10** pilot tenants must sign in within 7 days before the other buildings start.

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1. What changes

1.1 For tenants

A tenant opens the portal on a phone. Nothing is installed. The tenant can:

- pay rent online, by bank transfer or card;
- report a repair, with a photo;
- read tenancy papers and notices.

That is all. Rent is still due on the 1st. The portal reminds the tenant on day 3 and day 7 after the due date. A receipt is emailed straight after payment.

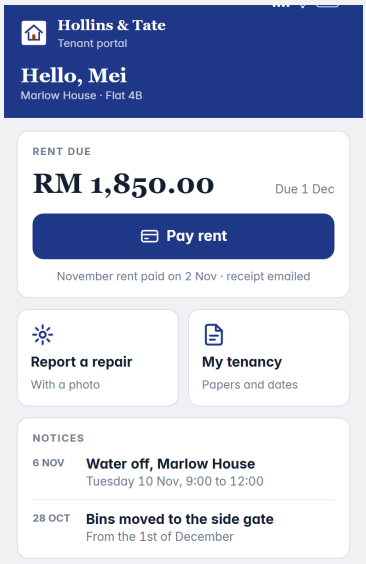


Figure 1. *Tenant home: rent due and report a repair*

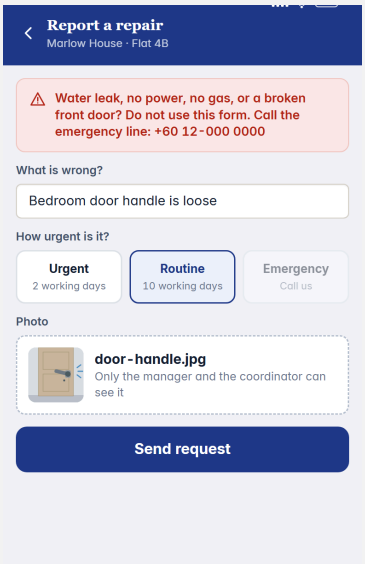


Figure 2. *Report a repair: the emergency banner, priority and photo*

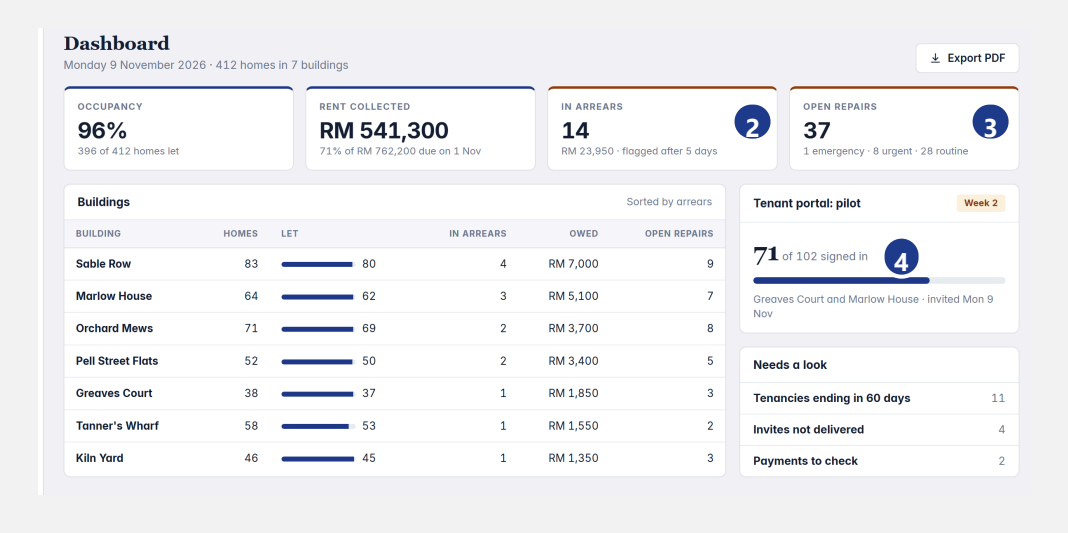
1.2 For managers

> Dashboard

The dashboard shows what needs a manager's attention today.

1. Open **Dashboard**.
2. Look at **In arrears**. A home is flagged red after 5 days late.
3. Look at **Open repairs**.
4. Look at **Tenant portal: pilot** to see how many tenants have signed in.

Figure 3: The dashboard: arrears, open repairs and the pilot count

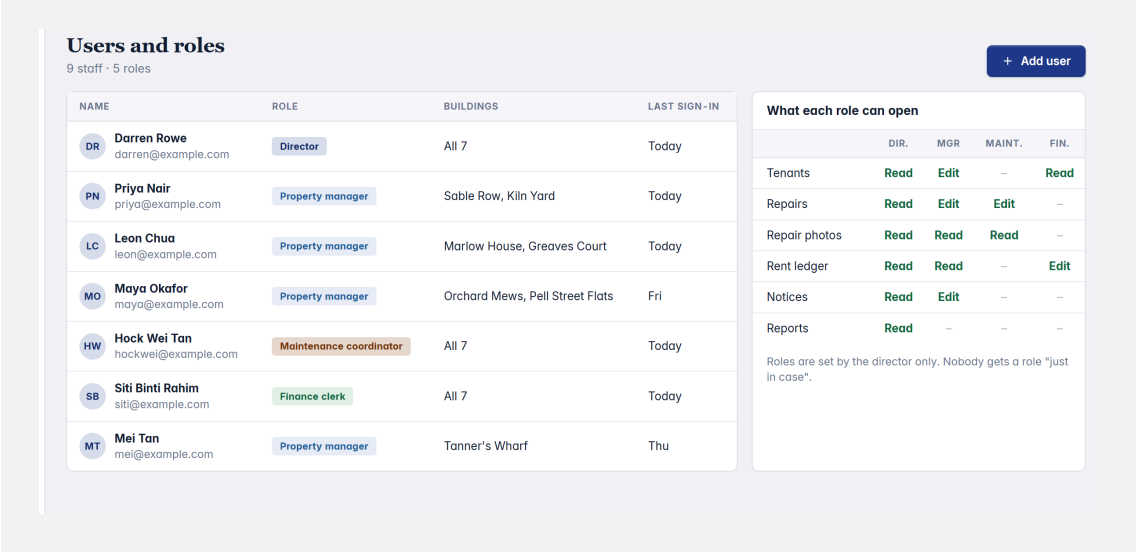


2. Who sees what

There are five roles. Nobody gets a role "just in case". Ask the director.

Role	Can open	Cannot open
Property manager	Tenants, repairs and notices of their own buildings	Other buildings
Maintenance coordinator	Repairs and contractors, all buildings	Rent figures
Finance clerk	Rent ledger and arrears, all buildings	Repair photos
Director	Everything, to read, and the reports	Changes nothing
Tenant	Their own home	Everything else

Figure 4: Users and roles: each person, their role and their buildings



3. Repairs

> Repairs

3.1 Priorities

The tenant picks a priority. The coordinator can change it, and the tenant sees the change.

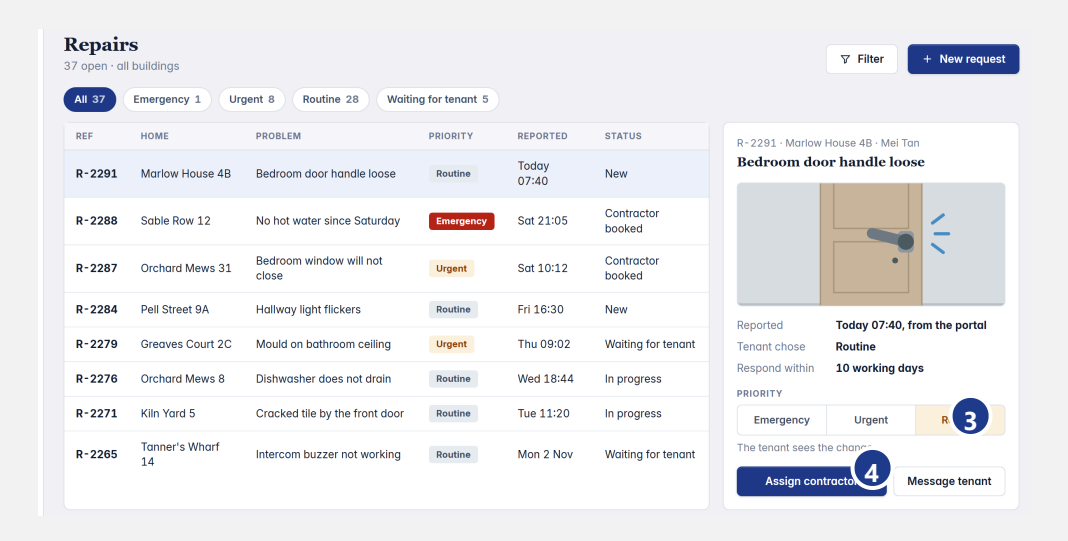
Priority	Examples	We answer
Emergency	Water leak, no power, no gas, broken front door	In 4 hours
Urgent	Window will not close	In 2 working days
Routine	Hallway light flickers	In 10 working days

> **Warning**
> An emergency is not reported in the portal. The tenant must call the emergency line. The portal shows a red banner with the number.

3.2 Handle a request

1. Open **Repairs**.
2. Click the request.
3. Check the **Priority**. Change it if it is wrong.
4. Click **Assign contractor**.

Figure 5: A repair request: priority and Assign contractor



Contractors do not use the portal in this release. The coordinator sends the job to the contractor by email, as before.

4. The rollout plan

4.1 Five weeks

Tick each item when it is done.

- [ ] **Week 1, setup.** Import the 412 tenancies. Check names and emails. Make the 5 manager accounts and train them for 1 hour.
- [ ] **Week 2, pilot.** Greaves Court (38 homes) and Marlow House (64 homes). Letters and invites go out on Monday.
- [ ] **Week 3, review.** On Friday, look at arrears, repairs and complaints. Decide: go or no go.
- [ ] **Week 4, the other buildings.** 5 buildings, 310 homes. Invites go out in 2 batches, Monday and Wednesday.
- [ ] **Week 5, paper stops.** The paper rent book stops on the 1st. The phone line stays.

4.2 The go or no go rule

> Go when at least 6 out of 10 pilot tenants have signed in within 7 days, and no payment has gone missing.

5. Risks

5.1 What can go wrong

Risk	What we do
About 60 tenants have no email address	A manager visits and writes the address down. Until then the tenant keeps paying at the office.
A tenant pays twice, by bank transfer and by card	The finance clerk checks the ledger every Monday morning and refunds within 5 working days.
A repair photo shows people in the flat	Only the coordinator and the manager see photos. They are kept for 12 months.
An old email address makes the invite bounce	The manager sees **Not delivered** on the tenant's row and fixes the address.
A contractor does not use the portal	The coordinator forwards the job by email. Contractor access is not in this release.

> **Warning**
> Tenant details are kept for 12 months after the tenancy ends.

Change log

Version	Date	Change	By
1.0	2026-11-06	First version	Hollins & Tate Lettings