



# Landlord User Guide

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## INTRODUCTION TO HOMESWAPPER

**HomeSwapper** is the UK's most popular mutual exchange service, with more than half a million members.

Since 2007, **HomeSwapper** has helped more than  $\frac{1}{4}$  of a million families and individuals swap their homes, saving landlords an estimated £200m on potential voids.

Every day, thousands of people log on to **HomeSwapper** because they want to move.

For many this is because they need more space, or they're moving for work or to be closer to family. Others may be in crisis situations and need to make a new start.

We hear hundreds of these stories every month, and that's what makes us passionate about what we do!

## QUICK START GUIDE

### How do I authorise a tenant to use the HomeSwapper service?

When your tenants register on the **HomeSwapper** website you need to “approve” them before they can have full access.

Until you do this, they won’t be able to see other swappers’ contact details, send messages to them, etc.

See [Authorising HomeSwapper Accounts](#)

### How do I find my tenant’s details?

The simplest way to find your tenants on **HomeSwapper** is to search for them by their name or address using the [Quick Search](#) at the top of the page.

If that gives you too many results or you can’t find what you’re looking for, try the [Advanced Search](#) instead.

### How do I record a swap?

Tenants using **HomeSwapper** can record they have swapped, but so can you.

It’s important to do this (even if they did not find their exchange through **HomeSwapper**) because it keeps the system up to date for other swappers and ensures your organisation has accurate swap data for reporting.

**Step 1** – Find the person by their name or address using the [Quick Search](#).

**Step 2** – On their [Tenant Overview Page](#), you can then [Record they have swapped](#), either a “Quick” Swap, or better still, if you have more details about the exchange record a ["Full" swap](#) instead.

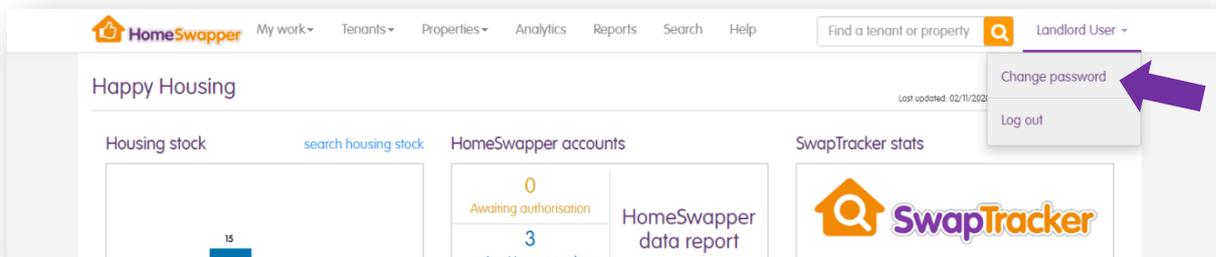
### Help, I’ve forgotten my password!

If you can’t remember your **HomeSwapper** password, simply click on the [Forgotten Password](#) link on the [Log in](#) page.

If that doesn’t work, contact our Customer Support team by emailing [landlords@homeswapper.co.uk](mailto:landlords@homeswapper.co.uk)

## How do I change my password?

When logged in, hover your mouse over your name at the top right of the page. An option to [Change your password](#) will be shown.



## Can I view what my tenants see on HomeSwapper?

Yes, you can [Log in as your tenant](#) by clicking the button on their [Tenant Overview Page](#) page.

This allows you to see what they see on the **HomeSwapper** website, e.g. you can see all the homes they have been matched with.

Note: due to the GDPR restrictions, you cannot see their private messages. However, you can access all other areas and update their details too.

Logging in as your tenant is a “*silent login*” meaning the tenant will not be aware you have logged in as them.

## LOGGING IN

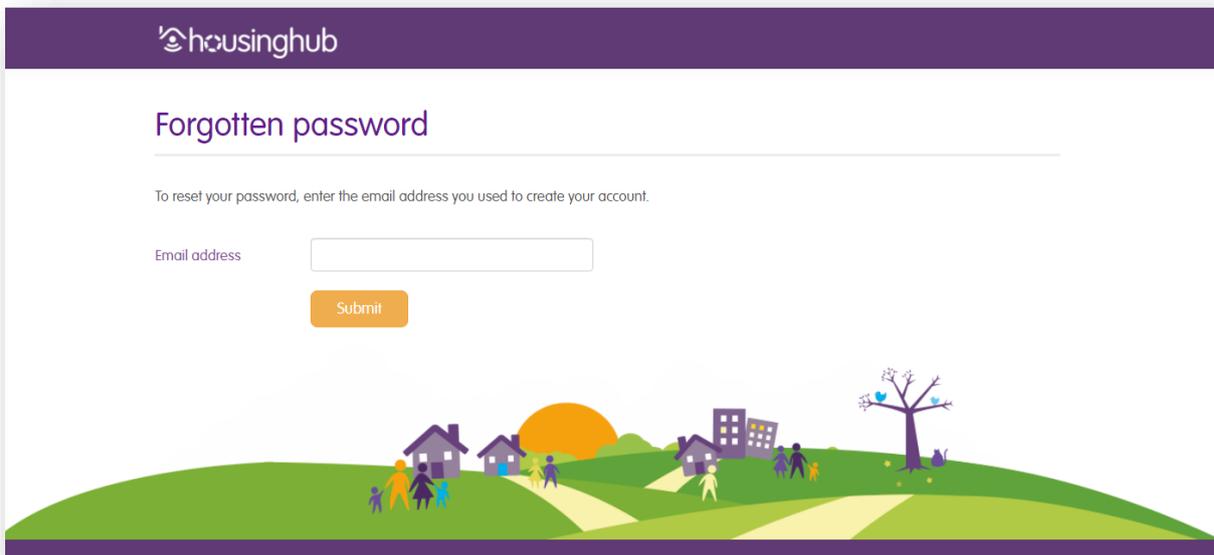
To access your account, go to the Housing Hub ([www.housinghub.co.uk](http://www.housinghub.co.uk)) and Sign In.

After logging in successfully, you will see a list of the tools your organisation has a subscription for. Select **HomeSwapper** to continue to your account.

If you are interested in any of the other tools available in the suite, please contact [landlords@homeswapper.co.uk](mailto:landlords@homeswapper.co.uk) for more information.

## Forgotten Password

If you have forgotten your **HomeSwapper** password, simply click on the “*Forgotten your password?*” link and enter your registered email address.

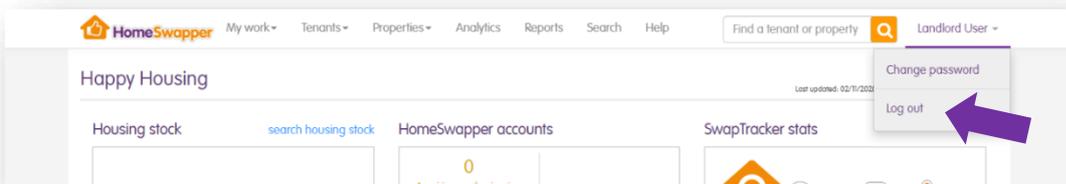


We will then send you an email with a secure password reset link. Click on the link and create a new password. Remember to check your junk folder if you don't receive an email.

## LOGGING OUT

Although your session will automatically expire if you've not been active for a while, it is still important that you log out from **HomeSwapper** when you are finished.

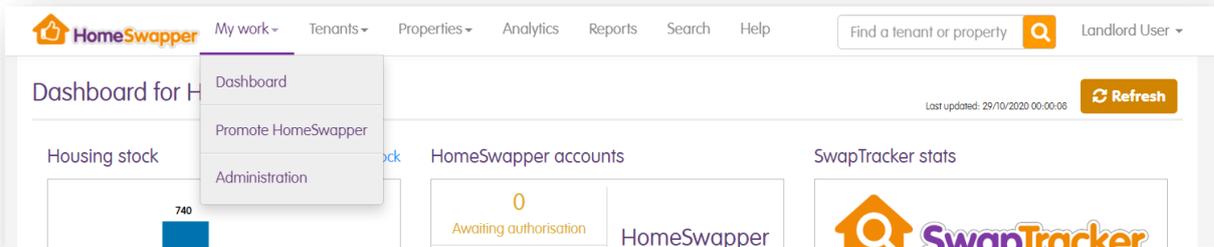
Simply click on your name at the top right of the page and select “*Log out*”.



## MY WORK

The “My work” area of **HomeSwapper** contains the following sections:

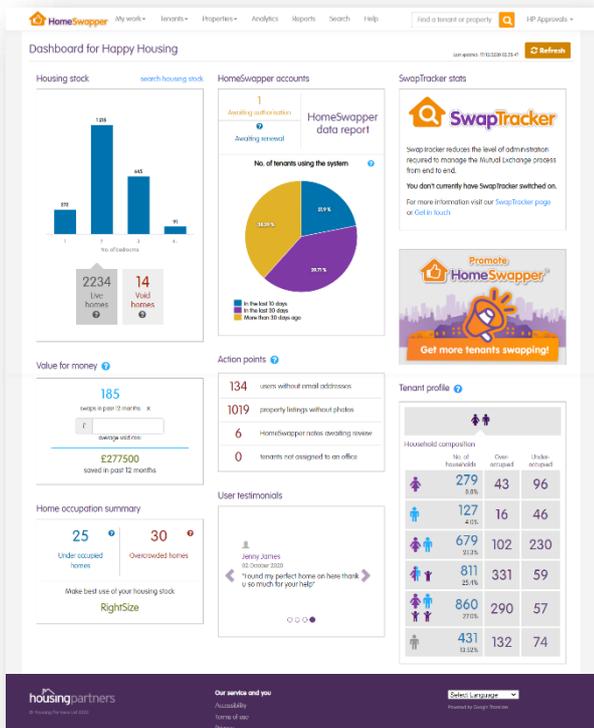
- [Dashboard](#)
- [Promote HomeSwapper](#)
- [Administration](#)



## Your Dashboard

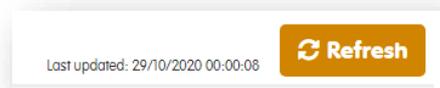
Your dashboard gives you an overview of activity for your organisation.

Due to the large amount of information, we update some of the totals on your dashboard overnight.



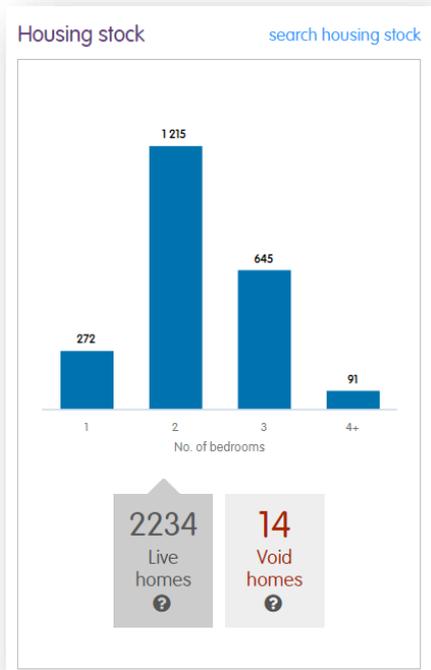
This can sometimes mean they are slightly out of date.

To get the very latest information, simply click the “Refresh” button at the top of the page.



This also shows you the last time your dashboard was updated.

## Housing Stock



**Live homes** – this is the number of homes currently on **HomeSwapper** where the tenant has been approved by your organisation.

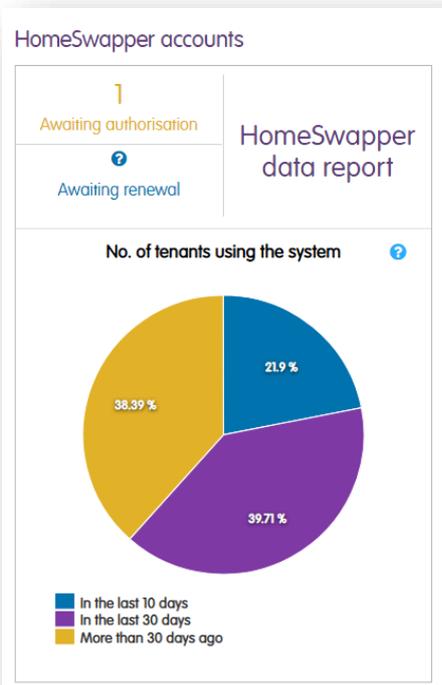
Click this number to view a list of these homes.

**Void homes** – this is the number of void homes (i.e. immediately available without a swap) your organisation has on **HomeSwapper**. This total includes voids currently being advertised as well as those waiting to be advertised.

Click this number to view a list of these homes.

For information on how to add a new void home refer to [Advertise a Void](#)

## HomeSwapper accounts



**Awaiting authorisation** – this is the number of new tenants who have registered and need you to approve them to use **HomeSwapper**.

Click the link to view the list of tenants waiting. See [Authorise HomeSwapper Accounts](#) more details.

**Awaiting renewal** – this is the number of tenants who were previously approved to use **HomeSwapper** and now require re-approving.

Note: if your organisation has “*automatic renewals*” switched on, this will not show the total (as per the example).

**HomeSwapper data report** – Click this link to go to your [Reports](#) section.

**No. of tenants using the system** - This pie chart shows how active your tenants are on **HomeSwapper** by looking at how recently they have been logging in.

## SwapTracker



**SwapTracker** is our add-on tool for **HomeSwapper** which allows you to process all your Mutual Exchanges online.

If your organisation has a SwapTracker subscription, this panel will show you relevant information, e.g. the number of MX applications where decision is due in the next 7 days.

## Promote HomeSwapper

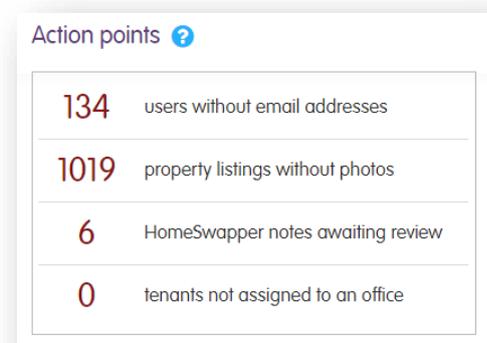


Clicking the “*Promote HomeSwapper*” panel on your dashboard takes you to the

**HomeSwapper** Landlord Resource Centre ([www.homeswapper.uk](http://www.homeswapper.uk)).

For information see [Promote HomeSwapper](#)

## Action points



These “*Action points*” assist you in helping your tenants get the most out of **HomeSwapper**.

Click on any of the totals to view the list.

### *Users without email addresses*

This is the total number of your registered tenants (not archived or swapped) who do not have an email address.

Clicking the total takes you to the list. You can also extract their details in CSV format (opens in Excel) from that list too.

Obviously having an email address makes finding a swap easier (e.g. we'll let them know if they've got a new message or we've found new homes that match their requirements).

Therefore, you could contact these tenants to encourage them to add an email address or you can update their details if you know an up to date email address for them.

### *Properties without photos*

This is the total number registered homes (not archived or swapped) where the tenant has not uploaded a photo.

Having photos on your home advert significantly increases your chances of finding a swap.

Therefore, you could contact these tenants to encourage them to add a photo to their home.

Guides on how to upload photos are available on the [HomeSwapper.me tenants' site](#) and the [Promote HomeSwapper](#) landlord resource centre.

### *Notes awaiting review*

If you decline a tenant's membership of **HomeSwapper**, you can also add a note with an optional review date.

This total shows the number of "open" notes where the review date has now passed.

Click the total to view the list of notes for review. See [Rejecting a tenant account](#) for more details.

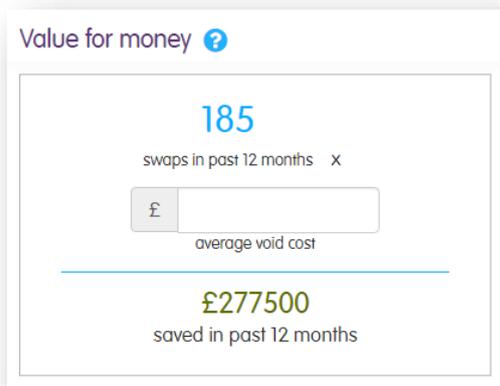
### *Tenants not assigned to an office*

If your organisation automatically associates tenants with your offices based on their postcode, this will show you any tenants who have registered but the postcode is not in the list we have for you.

This could be because they are not your tenant or their postcode is not in the list we have for your organisation.

If it is the latter, please email [landlords@homeswapper.co.uk](mailto:landlords@homeswapper.co.uk), specifying the postcode and the office it should refer to, and we will be happy to add that to your postcode list.

## Value for money



The “*Value for money*” calculator shows you how much money your organisation has saved through mutual exchanges taking place, thus avoiding a void property.

We take the number of swaps recorded on **HomeSwapper** in the last 12 months and multiply this by the average void cost (including lost rent, repairs and decorating costs, etc).

By default, we use an average void cost of **£1,500**. To get a more accurate total saving for your organisation, simply enter your own amount in the “£” box.

Clicking the total number of swaps takes you to [Tenant Swaps](#) section.

## Home occupation summary

You can use the “[RightSize](#)” tool to make better use of your stock by matching under-occupying households with those that are overcrowded.



**Under occupied homes** - The total number of registered homes (not archived or swapped) where the tenant has been identified as under-occupying, i.e. their current home has more bedrooms than their household requires.

**Overcrowded homes** - The total number of registered homes (not archived or swapped) where the tenant has been identified as overcrowded, i.e. their current home has less bedrooms than their household requires.

Click on any of the totals to view the list of registered tenants they relate to.

## Tenant profile

Tenant profile			
Household composition			
	No. of households	Over-occupied	Under-occupied
	279 8.8%	43	96
	127 4.0%	16	46
	679 21.3%	102	230
	811 25.4%	331	59
	860 27.0%	290	57
	431 13.52%	132	74

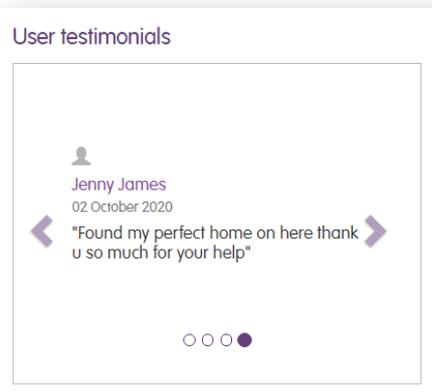
This table shows total numbers of registered households (not archived or swapped) broken down by the household type, i.e. Single females, Single males, Multiple adults without children, Single adults with children, Multiple adults with children and “*Unknown*”,

Each category then has the number that have also been identified as under-occupying or overcrowded.

You can use the “*RightSize*” tool to make better use of your stock by matching under-occupying households with those that are overcrowded.

Click on any of the totals to view the list of registered tenants they relate to.

## User testimonials



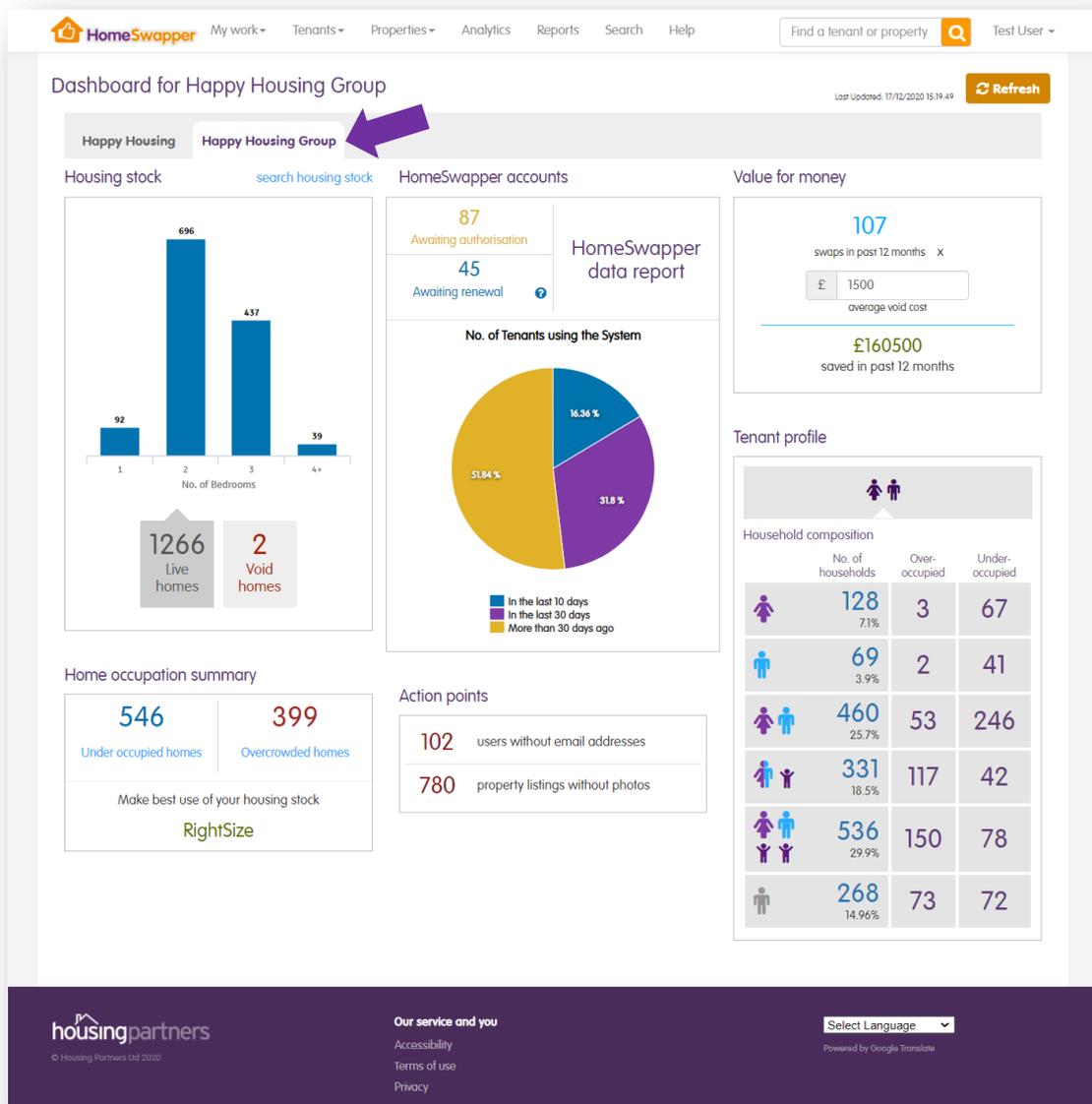
When a tenant records they have swapped, we ask them for feedback on the **HomeSwapper** service. This is optional.

A list of the most recent testimonials from your tenants is shown on your dashboard

## “Group” Dashboards

If your organisation has been set up on **HomeSwapper** as part of a larger group, you will have also access to the “Group” dashboard.

To get to this, click on your Group tab:



This version of the dashboard gives you overall totals for your group as a whole, i.e. it combines the statistics for all the organisations who are part of your group.

As with your own dashboard, many of the totals are clickable to drill-down to the homes or accounts they relate to.

## Promote HomeSwapper

“Promote HomeSwapper” takes you to the **HomeSwapper** Landlord Resource Centre ([www.homeswapper.uk](http://www.homeswapper.uk)).

Here we provide advice and content to support your own marketing and customer service efforts.

The materials include:

### *Guides & Advice*

A series of downloadable guides to help with all aspects of both promoting the service to new swappers and supporting existing ones.



### *Posters & Flyers / For Your Website*

Here you will find a series of useful items such as leaflets and posters that are downloadable and ready to use for tenant events or in your public areas.

There are also website / online adverts in various sizes that you are welcome to use on your tenant websites, as email attachments or to post on social media.



### *Landlord Newsletters*

All our landlord newsletters, past and present can be found here. These are full of handy information, support articles, release updates and other useful resources.

If you don't already receive our monthly **HomeSwapper** newsletter, simply email [landlords@homeswapper.co.uk](mailto:landlords@homeswapper.co.uk) and asked to be added to the mailing list.

It's a great way to keep up to date with the latest news, recent changes and top tips on making the most out of **HomeSwapper** and mutual exchange in general.

### *Image Bank*

A library of images that can be used in your emails, articles, social media posts or literature about **HomeSwapper**.

They are high resolution for online and social use.

### *Tenant Newsletters*

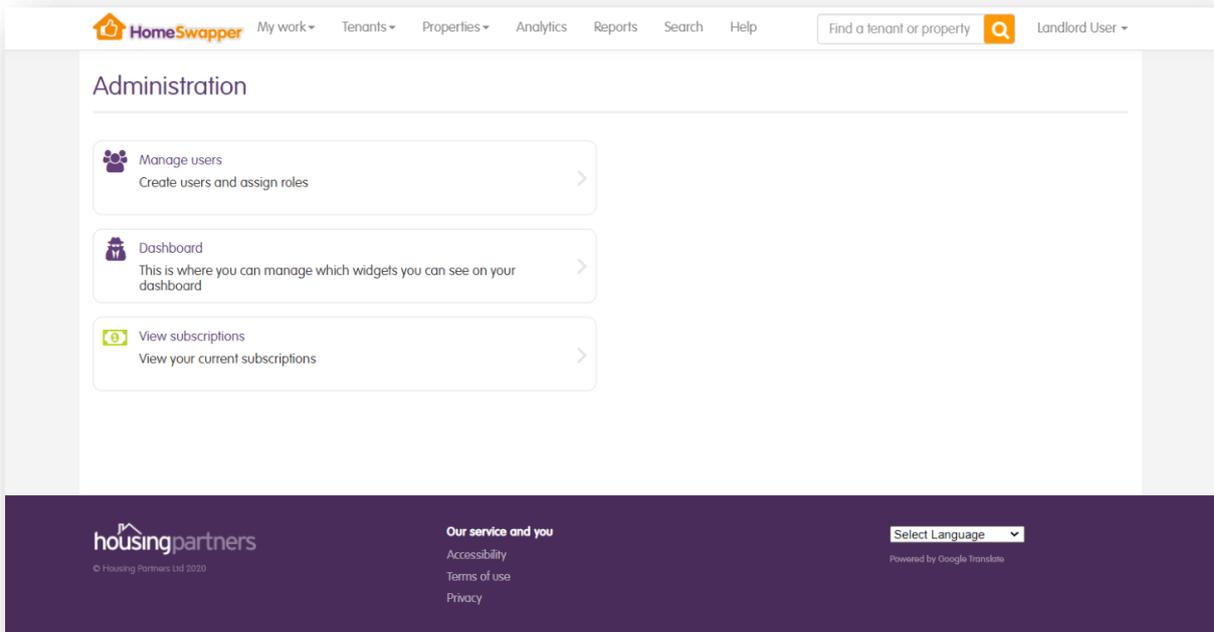
Here you can find content specifically designed for your email newsletters to tenants.

We've put together a series of short snippets and longer articles ready to drop into your tenant newsletters to help your tenants to get the very best out of **HomeSwapper**.

## Administration

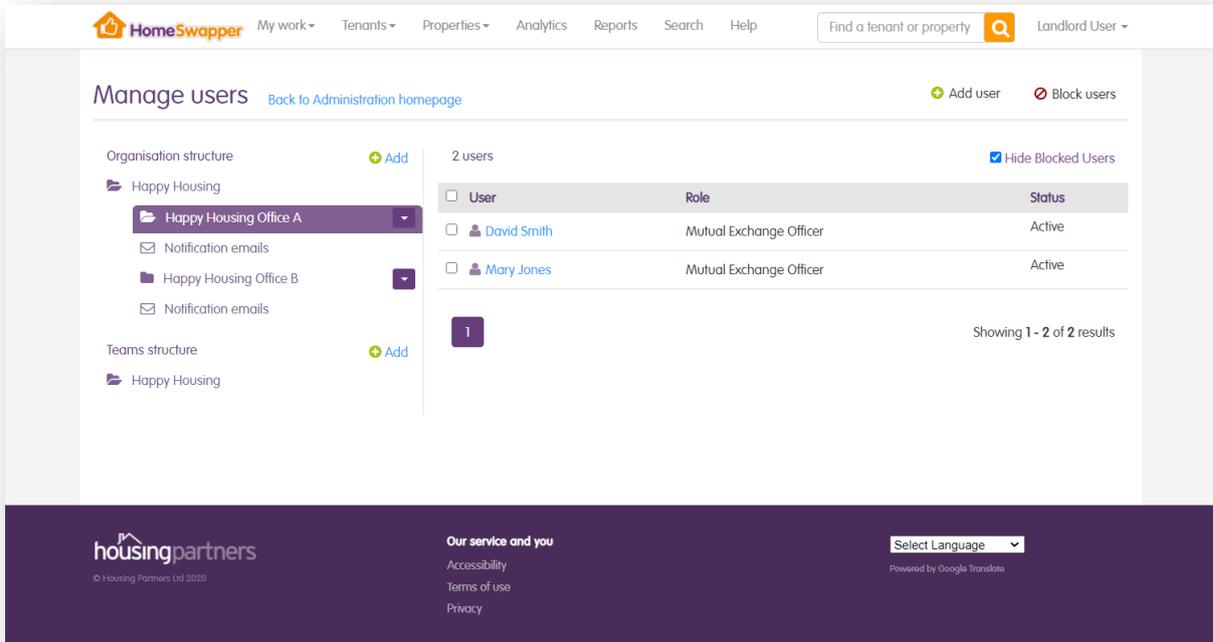
In the Administration section, you can [Manage Users](#), change your [Dashboard](#) view and see your organisation's [Subscriptions](#).

Note: you may only be able to access some of these sections if your login has the appropriate permissions.



## Manage Users

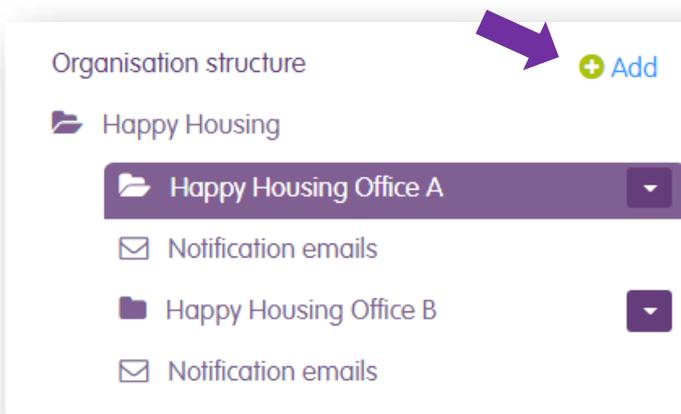
Here you can add/edit users and set up offices for your organisation.



### Your Offices

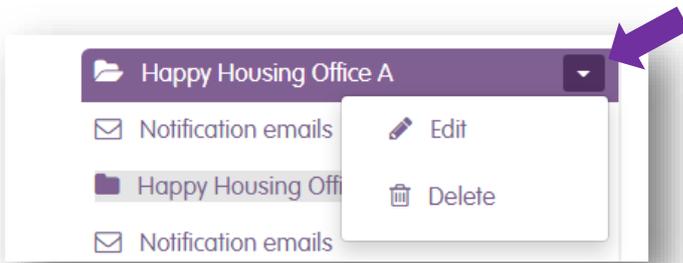
All your users must be assigned to an “Office”. You can have one office for everyone, or you might want to have multiple set up.

To add a new office, click the “Add” button:



You will then be prompted to enter an office name and address.

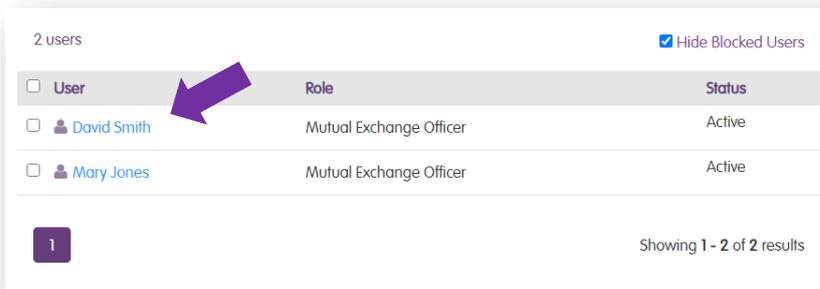
To change an office name/address or to remove one entirely, click the down arrow next to the office name:



Note: You cannot delete an office if it has users assigned to it. You will have to re-assign them to a different office first.

*Amending an existing user*

To edit a user, simply click on their name in the list:

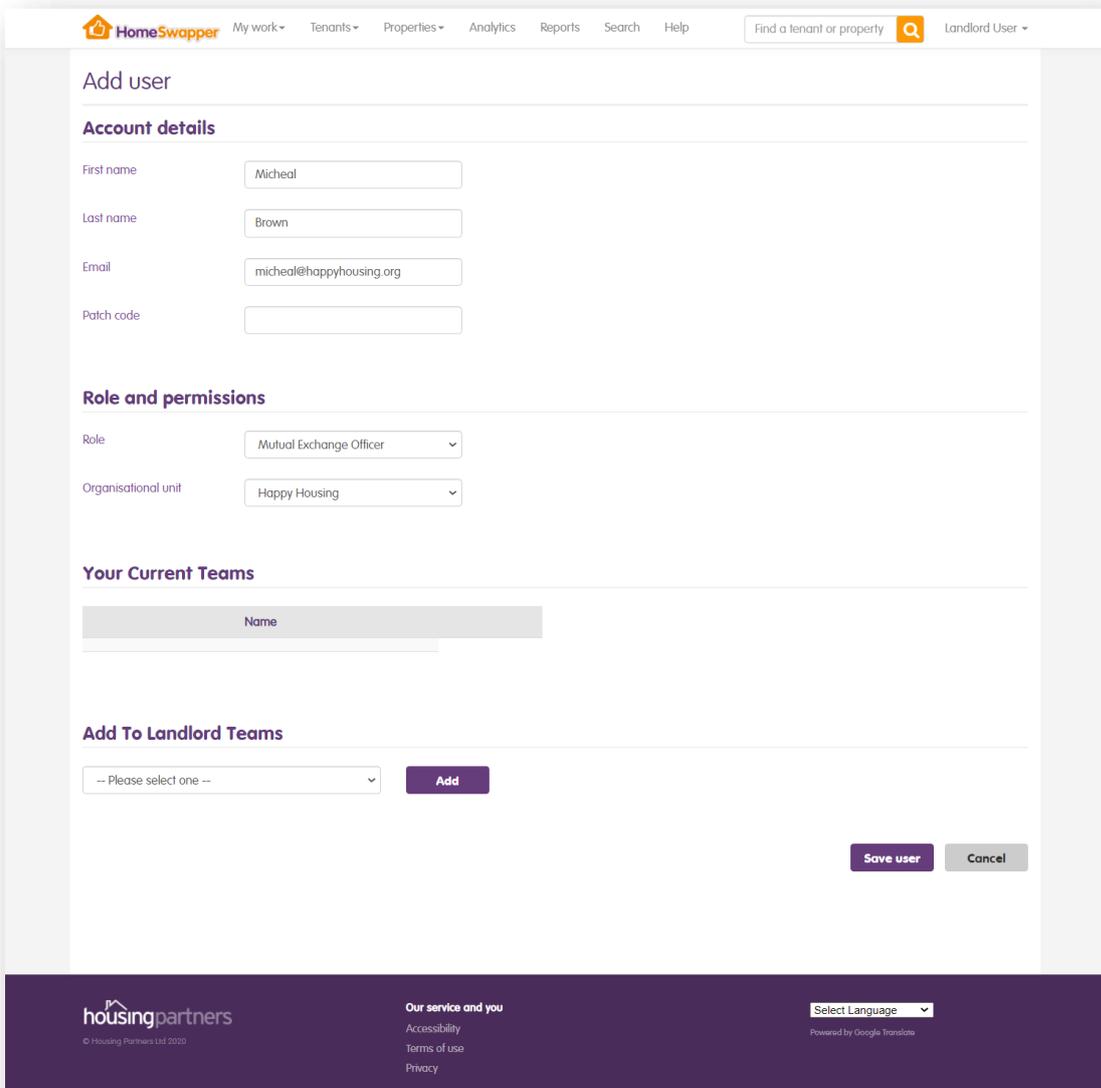


### Adding a new user

To add a new user, click on the “Add user” button at the top of the page.



This will take you to the new user form:



Here you can enter the following information:

- First name / Last name
- Email address – this must be entered because it will be used as their username for logging in. **Note: all usernames must be unique**
- Patch code – this is optional and can be entered for your own records
- Role – select the permission level for the new user
- Organisational unit – select the office you wish to assign them to
- Teams – this also optional and can be used to associate different users with different teams within your organisation

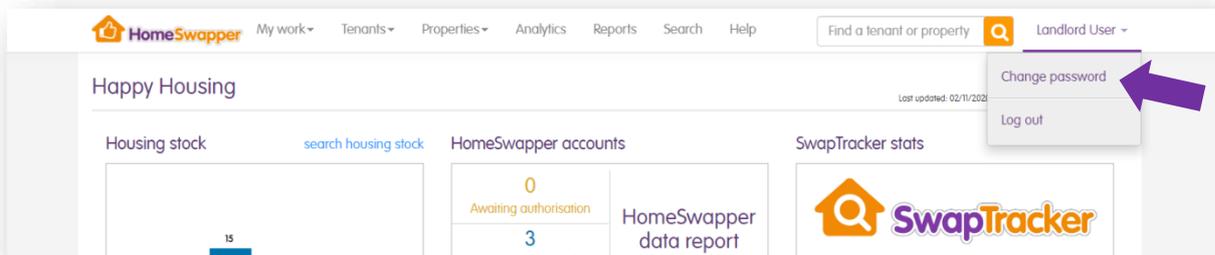
When you are happy with the details you have entered, click “Save user”.

The new user will then be created and a “welcome” email is sent. This allows them to log in and set their own password.

### *Changing your password*

All users can change their own password.

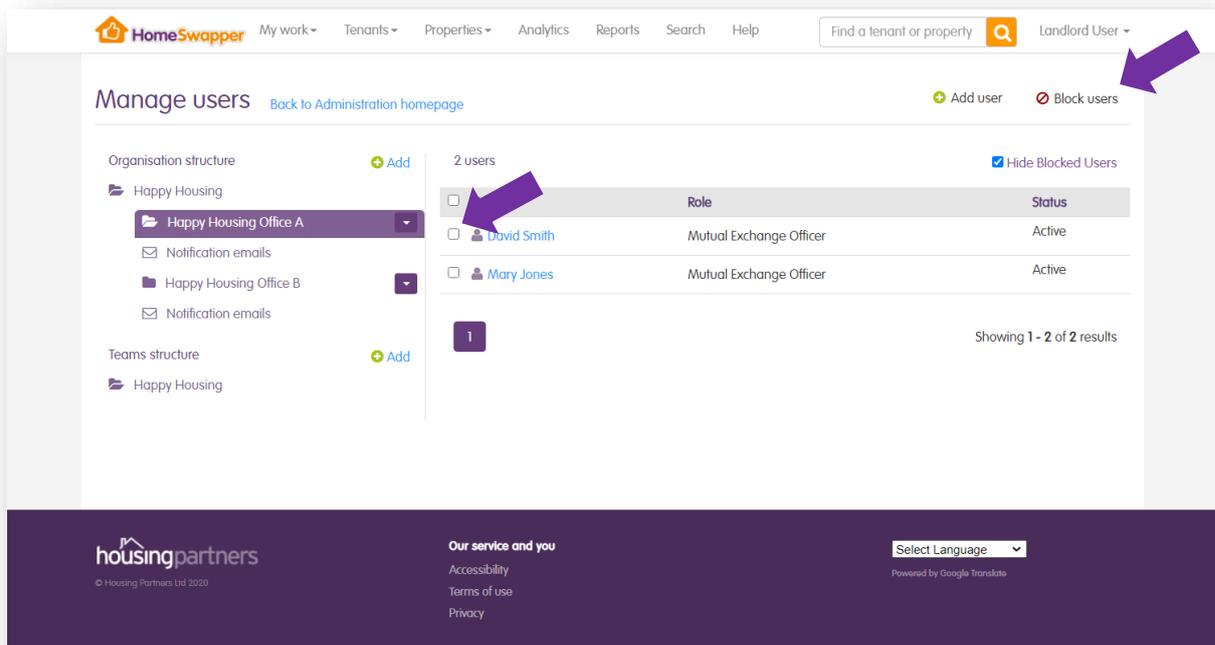
To do this, simply click on your name at the top right of the page and select “Change password”.



### Blocking users

If a member of staff no longer requires access to **HomeSwapper** (e.g. they have left your organisation) you should “*block*” their account.

To do this, tick the box next to the user you wish to block, then click the “*Block users*” button at the top of the page:



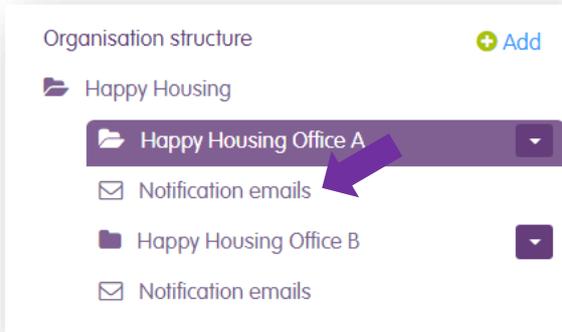
If you need to block multiple users, you can do so all in one go by ticking more than one box before you click “*Block users*”.

By default, all blocked users are hidden from your list of users. If you want to see them, un-tick the “*Hide blocked users*” box.

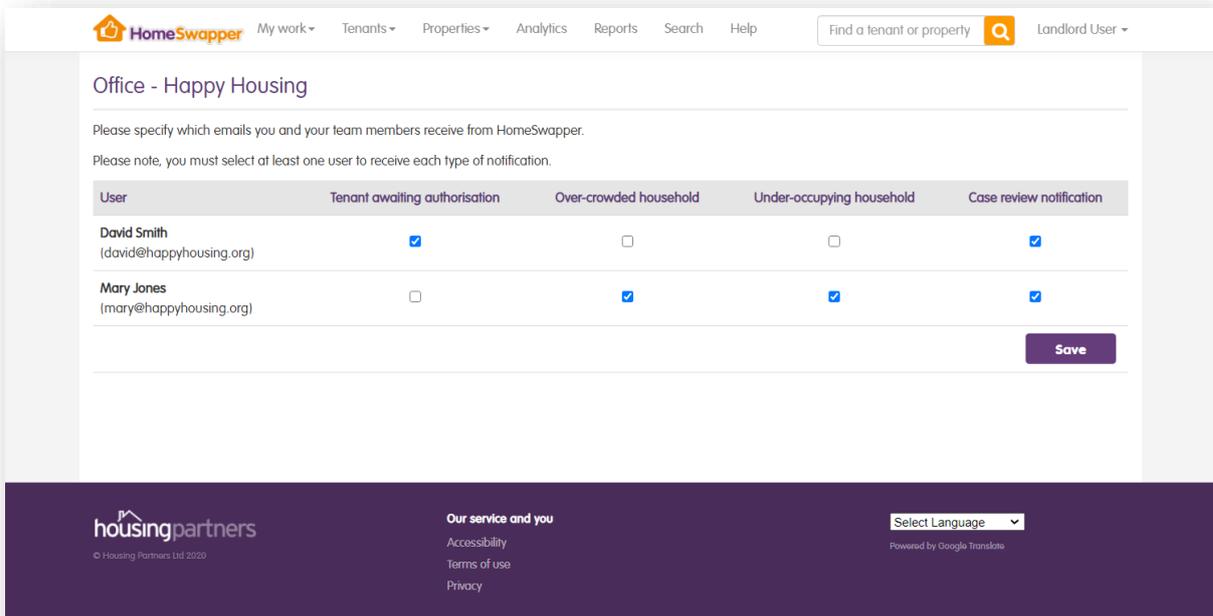
### Notification emails

When certain things happen on **HomeSwapper**, you can set up “*Notification emails*” to alert your users.

To do this, first click “*Notification emails*” for the office the user(s) are in:



Now select which type of notification each user will receive. Note: for some notifications you must have at least one person receiving them.



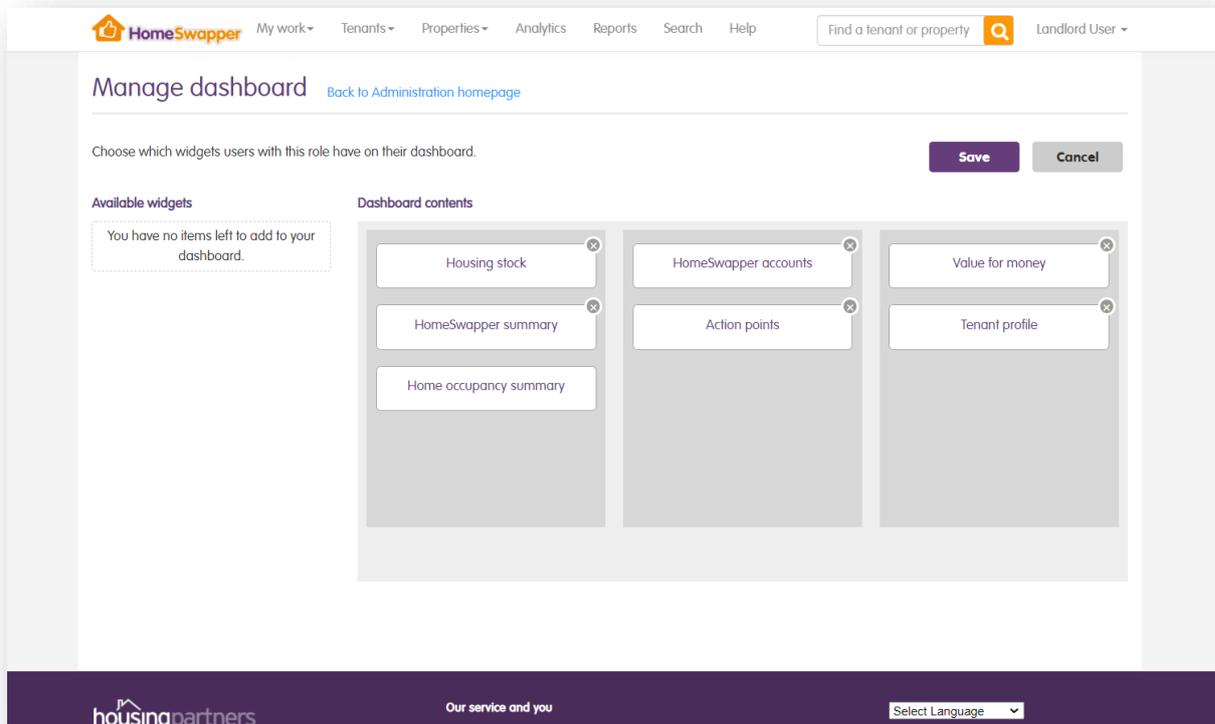
The types of notification are:

- **Tenant awaiting authorisation** – an email will be sent when one of your tenants registers on **HomeSwapper** and requires approval. See [Authorising HomeSwapper Accounts](#)

- **Over-crowded household** – an email will be sent when one of your tenants registers and we have identified they are currently overcrowding.
- **Under-occupying household** – an email will be sent when one of your tenants registers and we have identified they are currently under-occupying.
- **Case review notification** – an email is sent when a case review note date has been reached. See [Rejecting a tenant account](#)

## Manage Dashboard

Here you can customise the “*widgets*” that appear on [your Dashboard](#).



To move a widget to a different place on your dashboard, simply drag and drop it to another position.

If there are other widgets available to add to your dashboard, you can also drag and drop these from the “*Available widgets*” list.

To remove a widget completely, click on the “x” at the top corner:



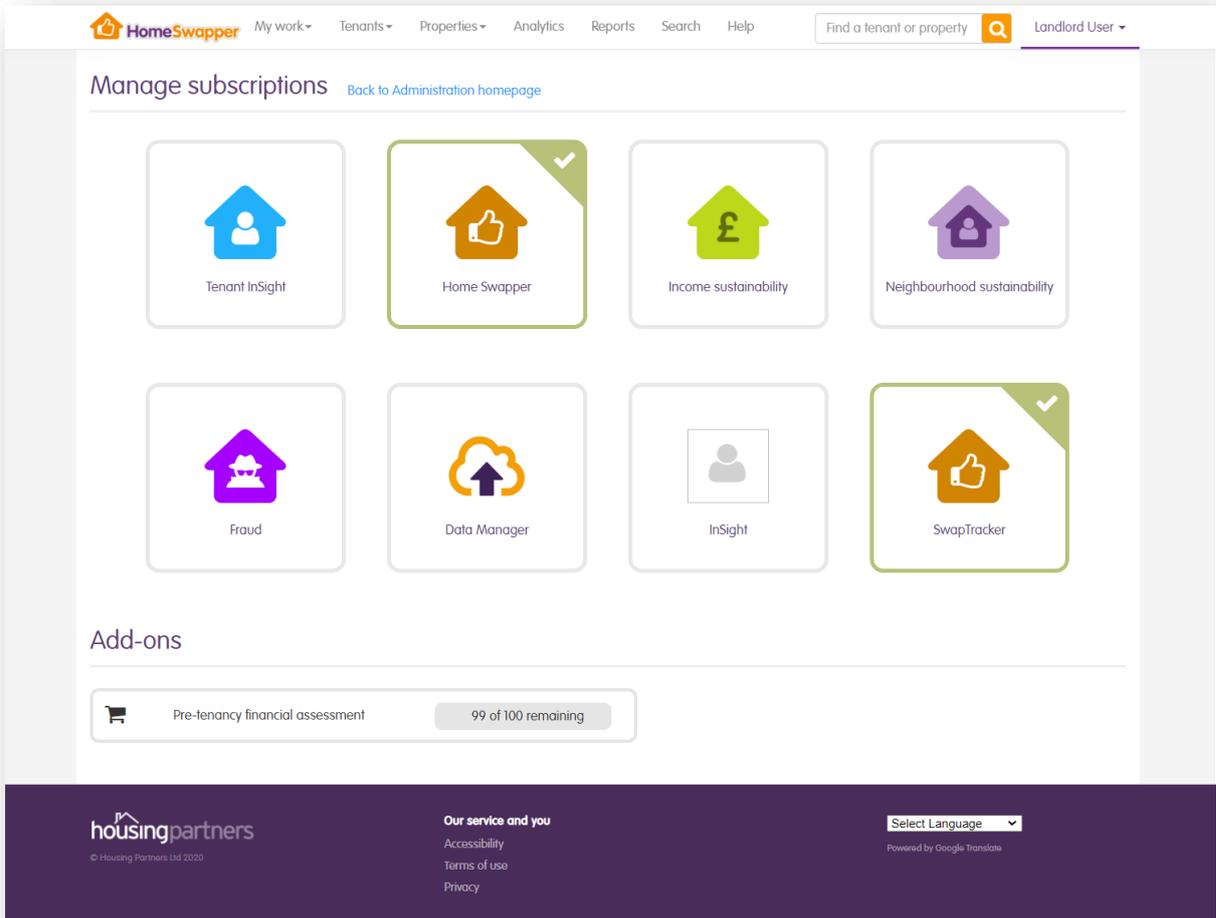
If you’re happy with the changes you’ve made, click “*Save*”. Otherwise, click “*Cancel*”.



**Warning** – this changes the way the dashboard looks for all the users in your organisation with the same user role not just for you!

## Manage Subscriptions

View what subscriptions your organisation has in the Housing Hub (HomeSwapper, Insight, etc).

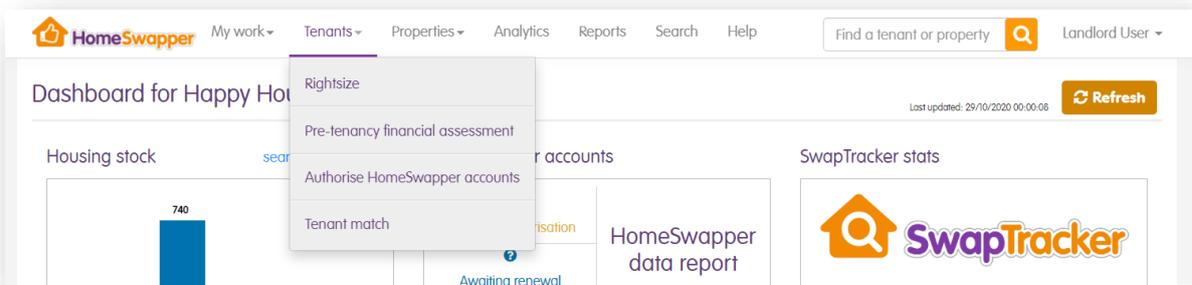


If your organisation uses [Pre-Tenancy Financial Assessments](#) you also see how many you have remaining.

## TENANTS

The “Tenants” area of HomeSwapper contains the following sections:

- [RightSize](#)
- [Pre-tenancy financial assessments](#)
- [Authorise HomeSwapper accounts](#)
- [Tenant match](#)



## RightSize

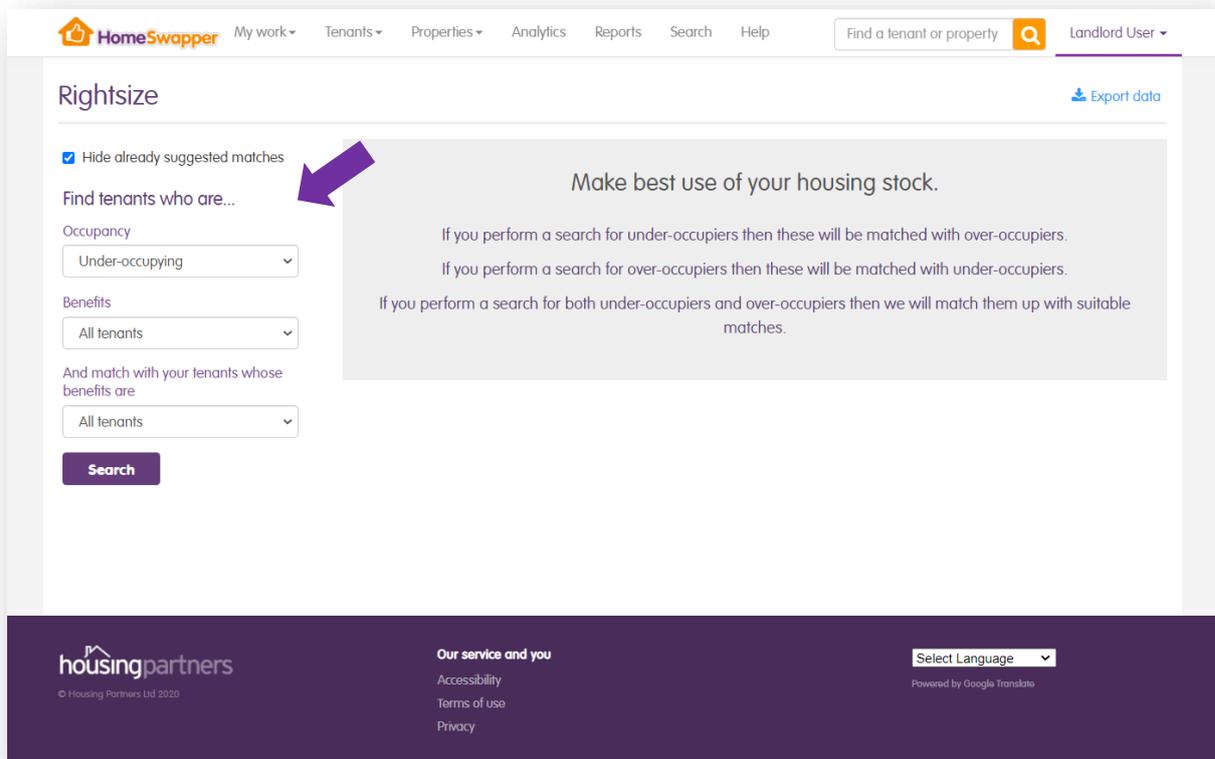
The RightSize tool is a way for you to proactively make best use of your housing stock by identifying tenants who are under and over-occupying.

We ask tenants mandatory questions about who they live with and whether they are in receipt of Housing Benefit so we can compare benefit level with rooms under-occupied or overcrowded to give an accurate rent-risk view.

By matching those that are under-occupied and those that are overcrowded and encouraging them to swap not only are you making best use of your stock but both households should be happier in the “right size” home.

## Running a RightSize search

On the RightSize page, there is a search form on the left. This is where you specify the type of households you want to find matches for.



The fields to enter are:

### 1. **Occupancy**

This filter allows you to specify the type of household you want to find matches for.

The options for Occupancy are:

- Under-occupying (any under-occupying tenants regardless of number of bedroom spare)
- Under-occupying by 1 bedroom
- Under-occupying by 2 bedroom
- Under-occupying by 3 or more bedrooms
- Overcrowded (any overcrowding tenants regardless of the number of bedrooms they are lacking)
- Overcrowded by 1 bedroom
- Overcrowded by 2 bedrooms
- Overcrowded by 3 or more bedrooms

### 2. **Benefits**

If you want to narrow your search down to find matches for households with specific benefit levels you can use this filter.

The options are:

- All tenants (everyone regardless of whether they receive housing benefit or not)
- Full amount (anyone who has their full rent paid by housing benefit)
- Partial (anyone who has some of their rent paid by housing benefit)
- Do not receive (anyone who does not receive any housing benefit at all)

The default is “*All tenants*”.

### 3. **Match with tenants benefits**

You can use this filter to further narrow your search down to match the tenants found using the above filters, to other households with specific benefit levels.

The default is “*All tenants*”.

For example, if you wanted to find matches for your under-occupying tenants who currently have all their rent paid by housing benefit, and only match them with tenants who do not receive housing benefit you would choose these filters:

1. Occupancy = “*Under-occupying*”
2. Benefits = “*Full amount*”
3. Match with your tenants whose benefits are = “*Do not receive*”

When you are happy with your criteria, click the “Search” button.

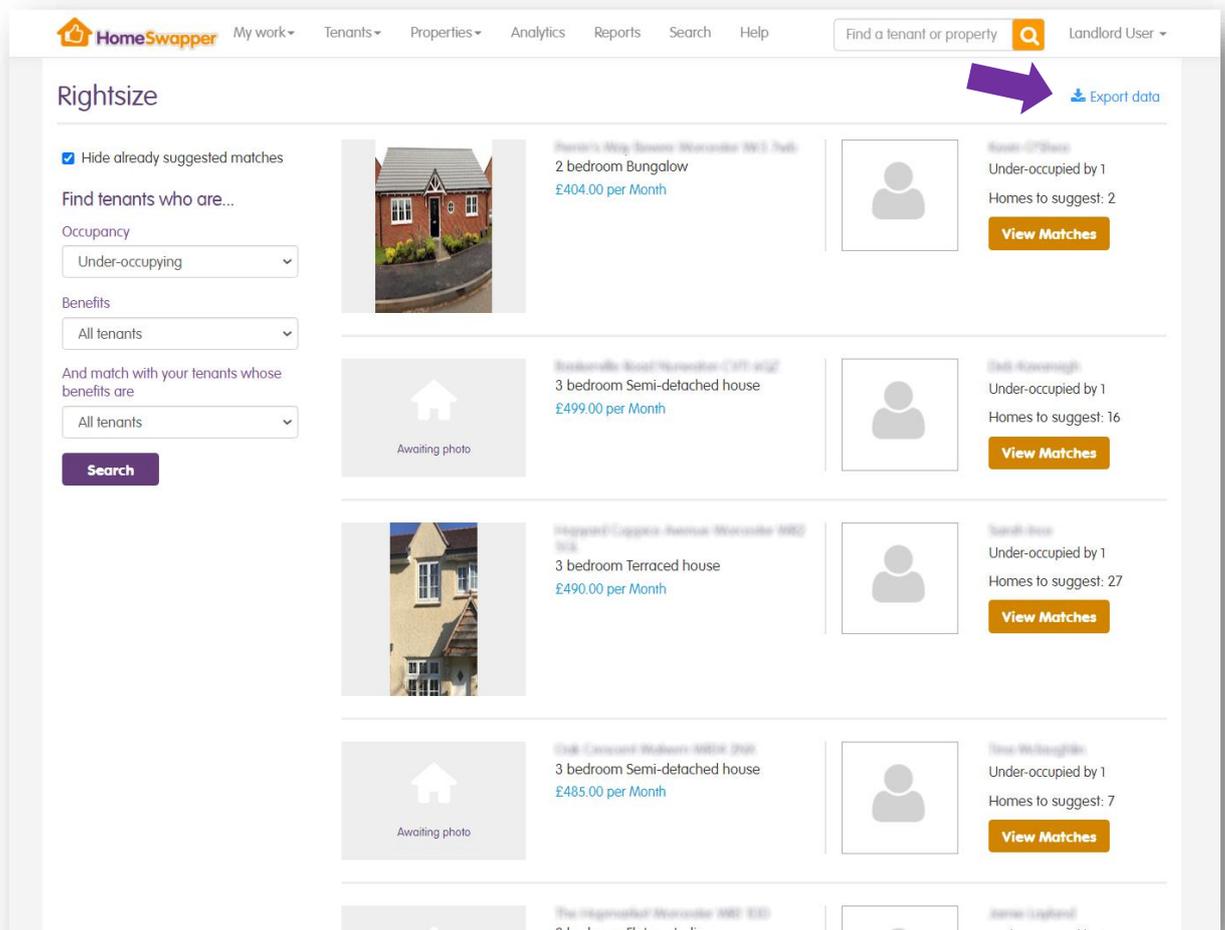
Depending on the criteria you have selected and the number of tenants you have registered on **HomeSwapper**, the RightSize search may take a few moments.

If you wish, you can leave the page at any time and the search results will still be there when you return (even if you log out).

## RightSize match results

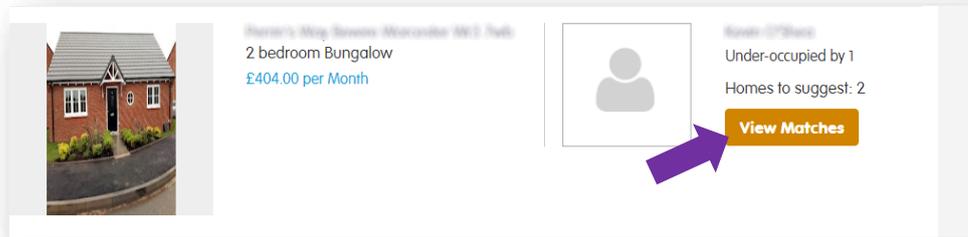
After your search has run you will see a list of all your tenants that match the criteria you used, and how many matching homes we found for them.

You can also export this as an Excel report, by clicking on the “Export data” button:



Each result shows you the name and address of the tenant, whether they are under-occupying or overcrowding, and how many matching homes RightSize has found for you to possibly suggest to them.

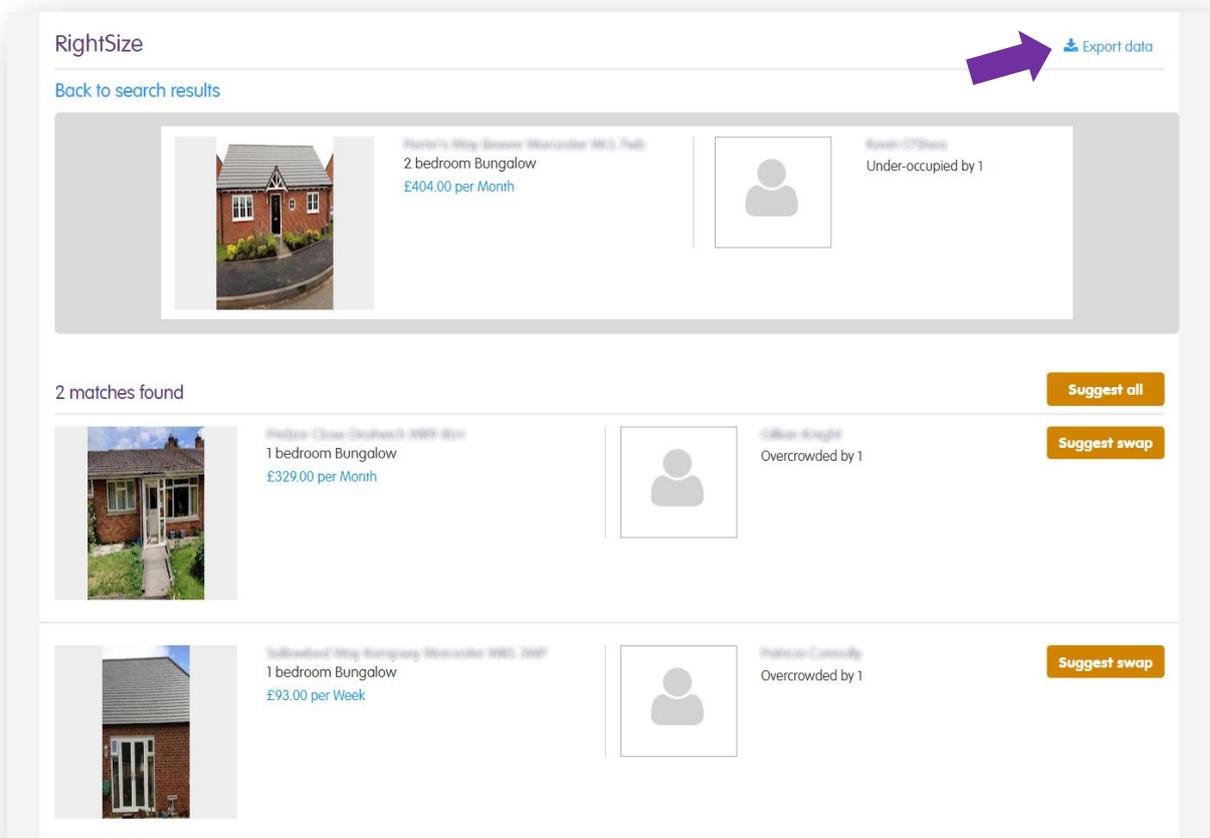
To view the matching homes, click on the “View matches” button:



### Suggesting homes to your tenants

When you view the matches RightSize has found for your tenants, you have the option to “Export data”. This will open details of the matching homes in Excel.

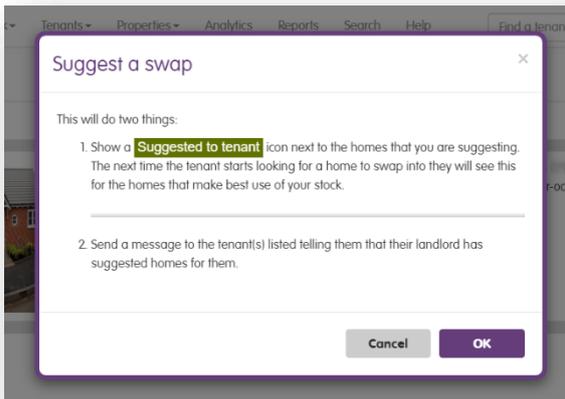
For example, you could use this list to share the home details with your tenant by email or letter.



However, the simplest way to share the details of these matches is to “Suggest” them.

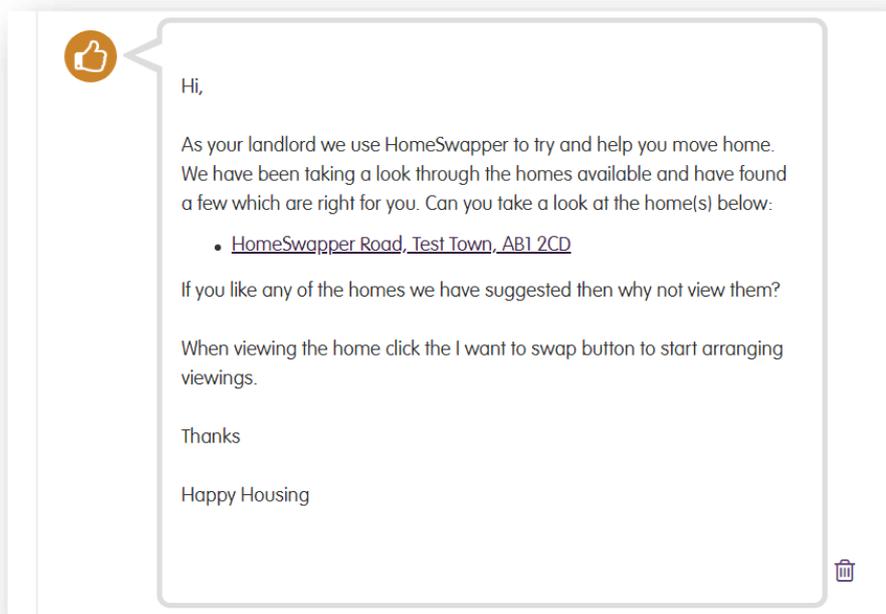
You can either suggest the homes individually by clicking on the “Suggest swap” button next to each of them, or click the “Suggest all” button to suggest all of them at once.

Before they are “suggested” to the tenant, you are also prompted to confirm you wish to continue. If not, click “Cancel”, otherwise click “OK” to proceed.



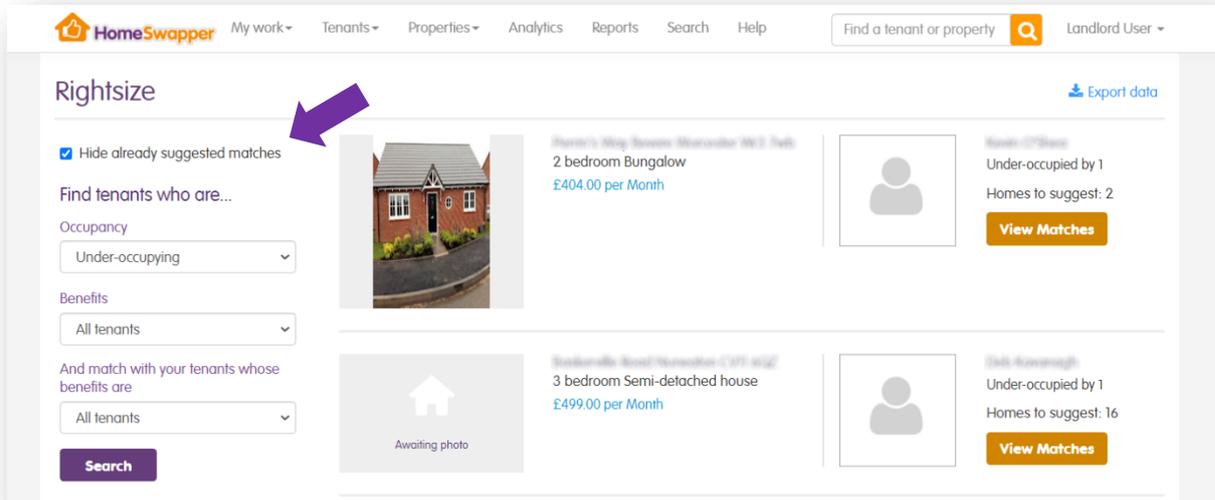
After you do this, two things happen:

1. **Suggested to tenant** is shown next the homes you’ve suggested. This helps you easily see which ones you’ve already done.
2. The tenant is sent a **HomeSwapper** message giving them details of the home(s):



By default, matching homes you have previously suggested to your tenants are hidden. This helps you easily see the ones you've not suggested yet.

If you do want to see the ones you have already suggested, simply un-tick the “*Hide already suggested matches*” box.



## Pre-Tenancy Financial Assessments (SafeStart)

If your organisation has a “SafeStart” subscription you can run Pre-tenancy financial assessments (PTFA’s) against potential new tenants.

PTFAs provide landlords with information to help them:

- Confirm a tenant is who they say they are, by verifying name, date of birth and address
- Understand more about the financial situation of an incoming tenant or a tenant that wishes to move property
- Identify if support programmes should be put in place and what the most effective support may be
- Understand any risk, such as the risk of non-payment

HomeSwapper My work ▾ Tenants ▾ Properties ▾ Analytics Reports Search Help Find a tenant or property 🔍 John Smith ▾

**SafeStart** Pre-tenancy financial assessment Powered by Experian

1 Enter details 2 Confirm & check 3 Results

To run a check please fill in the person's details below:

First name

Last name

Date of birth

Postcode

[Enter address manually](#)

PTFA credits remaining: 401 / 8150

To get more PTFA credits please contact our customer service team  
T: 0845 6187 162 or E: support@housingpartners.co.uk

Guidance for Pre-tenancy financial assessments (PTFAs)

Why would I run a Pre-tenancy financial assessment? -

PTFAs provide landlords with information to help them:

- Confirm a tenant is who they say they are, by verifying name, date of birth and address
- Understand more about the financial situation of an incoming tenant or a tenant that wishes to move property
- Identify if support programmes should be put in place and what the most effective support may be
- Understand any risk, such as the risk of non-payment
- Drive informed conversation with the tenant

When can a PTFA be used? +

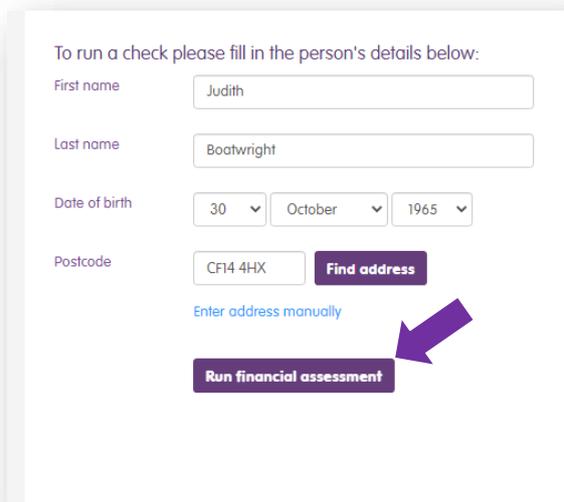
How does running a PTFA impact the applicant? +

Note: each time you run a check, it will use one of your PTFA credits. The number of checks your organisation has remaining is shown at the top of the page.



If you are getting low on credits or have run out, please contact [landords@homeswapper.co.uk](mailto:landords@homeswapper.co.uk)

To run a check, enter the first name, last name, date of birth and current address of the person. Then click “Run financial assessment”.



After confirming you wish to run the check, a report is generated as per the example below.



**Warning** – A PTFA leaves a “hard footprint” that shows the name of your organisation on the tenants’ credit file. This is visible to the tenant and any lender and it can impact a person’s credit score.

Therefore, it is essential you have the prospective tenants’ consent before running a check. We recommend you add a paragraph to your Tenancy Application to state that you will undertake pre-tenancy checks.

Example report:

26/08/2016 Housing Hub | Pre-tenancy financial assessment

## Pre-tenancy financial assessment powered by Experian

---

### Details

**Name & address:** J Boatwright - 9, St. Cenydd Road, Cardiff, CF144HX

**Date of birth:** 30 October '65

**Date of search:** 25 August 2016

**Search reference:** ZNLK67SB64

### Risk indicator

**889 - Moderate risk**  1000

**Experian risk score narrative - Moderate risk**

Most lenders view this score as moderate risk – a low proportion of applicants for credit with this score will experience serious repayment problems if the application is accepted.

### Level of debt

Total value of active CAIS accounts (Excluding mortgages)	No data found
Number of active CAIS accounts	No data found
Total value of outstanding County Court Judgement records	No data found

26/08/2016 Housing Hub | Pre-tenancy financial assessment

## Address confirmation

---

**Current address - 9 ST. CENYDD ROAD, , CARDIFF, , CF144HX**

Name at address	Residency	Source
JUDITH ZUIHASH BOATWRIGHT	03/1998 - 03/2004	Electoral Roll
STEPHEN MARGARET A DADZIE	03/1998 - 03/2004	Electoral Roll

26/08/2016

Housing Hub | Pre-tenancy financial assessment

### Credit search history

Application date	Company type	Name & address	Amount	Application type	Term	Opt out
25/02/2016	n/a	MS JUDITH ZUIHASH BOATWRIGHT - 9, CF14 4HX		Current account		

26/08/2016

Housing Hub | Pre-tenancy financial assessment

### Associate links

Associate name	Associate DOB	Source of information	Information date
MISS J ZUIHASH BOATWRIGHT	12/03/1965	CAIS data	24/02/1999
MISS JUDITH ZUIHASH BOATWRIGHT	12/03/1965	CAIS data	30/12/2009
MISS JUDITH ZUIHASH BOATWRIGHT	12/03/1965	CAIS data	01/10/2003

## Authorising HomeSwapper Accounts

When a tenant registers on **HomeSwapper**, their account is automatically referred to you as their landlord to authorise them. This gives them full membership for free.

Without full membership they are unable to contact other swappers and can only see limited information about other tenant's homes.

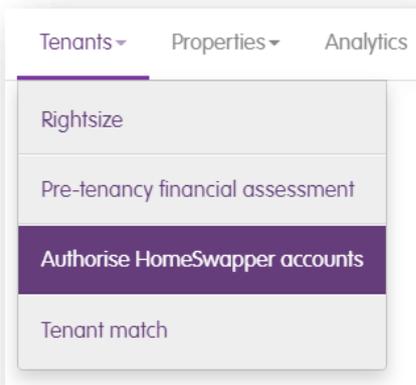
### Accounts awaiting authorisation

New registrations go into your *Awaiting Authorisation* queue.

You can access this list via the *HomeSwapper Accounts* widget on your dashboard:



Alternatively, you can also select the “*Authorise HomeSwapper accounts*” option from the “*Tenants*” menu at the top of the page:

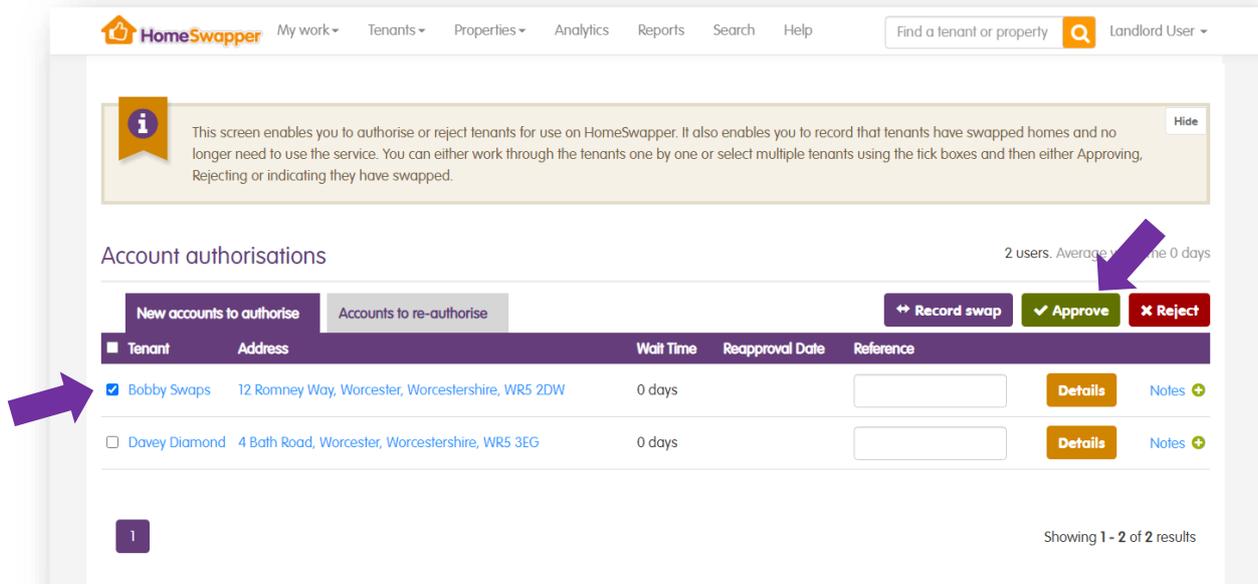


## Approving a tenant account

Approving your tenants' accounts gives them 6 month's full membership of the HomeSwapper website.

To do this, tick the box next to their details and click the "Approve" button.

To save time, you can also approve multiple tenants at the same time by ticking more than one box.

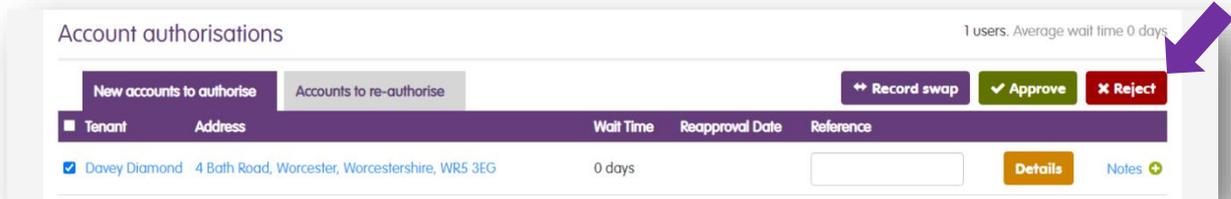


If you want to check the tenant's details before deciding whether to approve them or not, click on their name or address to view full details of them and the property they have registered respectively.

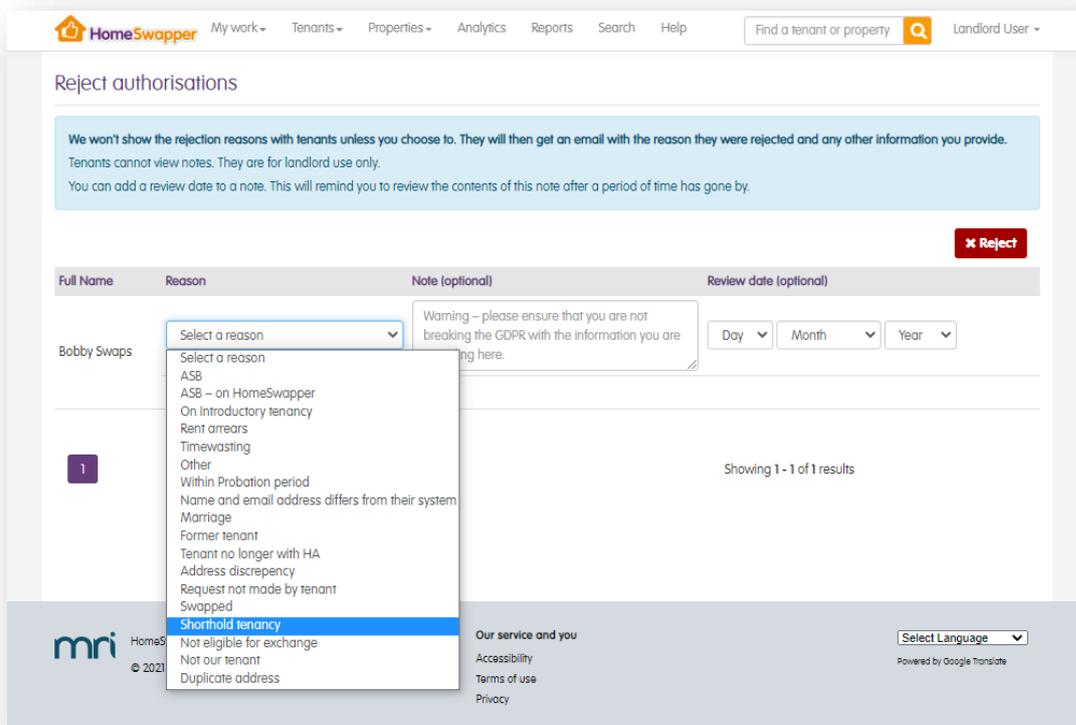
After approving a tenant, they are automatically sent an email notifying them.

## Rejecting a tenant account

If you need to reject a tenant’s account, tick the box next to their details and click the “Reject” button:



Before rejecting them, you must select a reason why:



If you also want the tenant to know the reason you are rejecting their account, tick the “Share rejection reason with tenant?” box.

Please note: this is optional and the reason they were rejected will not be communicated to them if the box is not ticked.

Full Name	Reason	Note (optional)	Review date (optional)
Bobby Swaps	Shorthold tenancy	Warning – please ensure that you are not breaking the GDPR with the information you are recording here.	Day Month Year
	<input checked="" type="checkbox"/> Share rejection reason with tenant?	Additional information for tenant (optional) You currently have a Shorthold tenancy and are not eligible for a mutual exchange.	

If there is any additional information you would like to tell the tenant about why you are rejecting them, enter it in the optional text box provided.

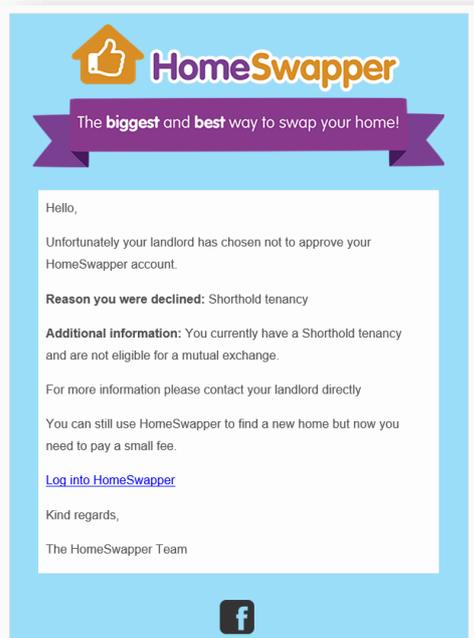
At this stage, you can also add a note against their account. This is optional and the tenant cannot see what you have entered.

In addition, you can add an optional review date if you are planning to review your decision, e.g. you might give them time to change the details on their account or even pay off any arrears!

If you do add a review date, you will be sent an automatic reminder email on that date and the “*HomeSwapper notes awaiting review*” total will be updated on your [Dashboard](#).

Clicking the “*Reject*” button will reject the tenant’s account and they will not receive 6 month’s full membership. However, they can still choose to pay to use of the website.

The tenant will be automatically sent an email informing them of your decision. If you chose to share the reason, this is included in the email too, e.g.



## Made a mistake?

If you reject a tenant in error, you can still approve them afterwards by going to their [Tenant Overview Page](#) and changing their *Account Status* to “Live – approved”.

## Accounts awaiting renewal

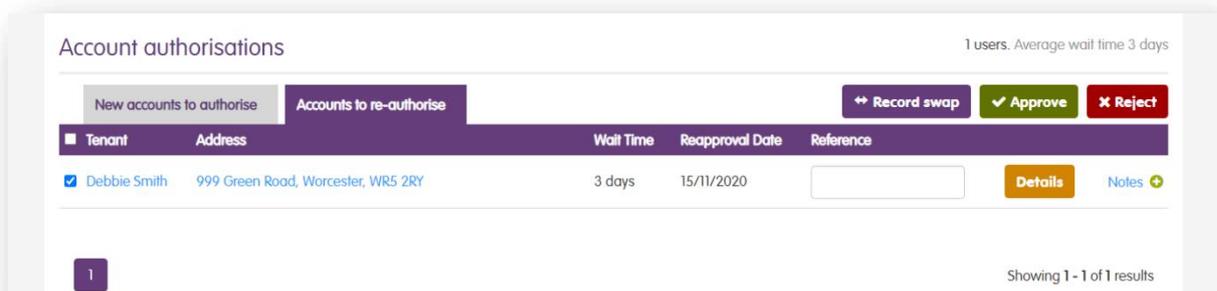
Every 6 months your approved tenants need to be authorised again for another 6 month’s full membership.

You can access this list via the *HomeSwapper Accounts* widget on your dashboard:



Alternatively, you can select the “*Authorise HomeSwapper accounts*” option from the “*Tenants*” menu at the top of the page.

Tenants in your “*Accounts to re-authorise*” list of tenants requiring renewal can be Approved or Rejected in the same way as new registrations.



## Auto-renewals

If your organisation has *Auto-Renewals* switched on, you do not have to manually re-approve your tenants each time. HomeSwapper will automatically do this for you.

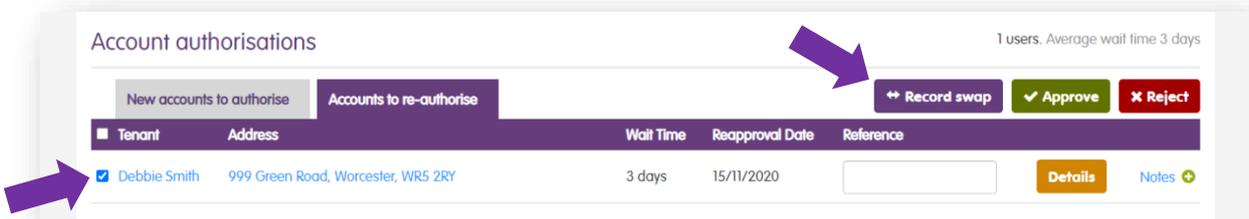
However, please note that tenants due for renewal will still appear in the list above 7 days before they are due to be renewed.

This gives you the opportunity to review them and approve/reject as appropriate if you want to. Alternatively, do nothing and they will automatically renew when due.

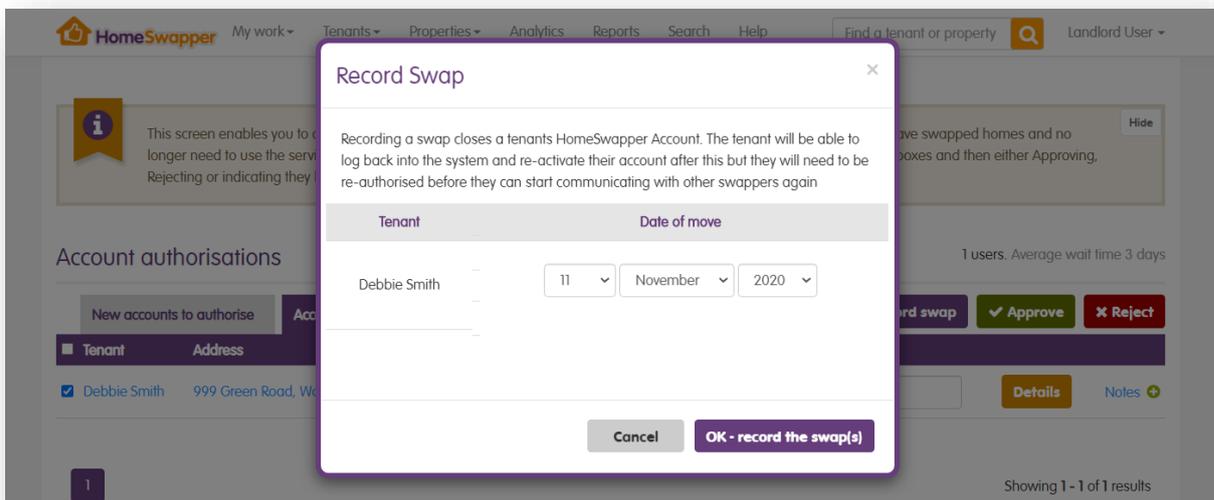
### Recording a Swap

If a tenant has swapped homes since they were last approved or renewed, you can record them as “swapped” instead.

To do this, tick the box next to their details and click the “Record swap” button:



To complete the swap, enter an approximate date they moved and click the “OK” button:



Note: this records a “Quick swap”, if you have more details about the exchange it’s better to record a “*Full swap*”.

## Auto-archiving of old accounts

To keep the **HomeSwapper** database up to date and to ensure the tenants on it are active and still looking for a swap, accounts are automatically archived.

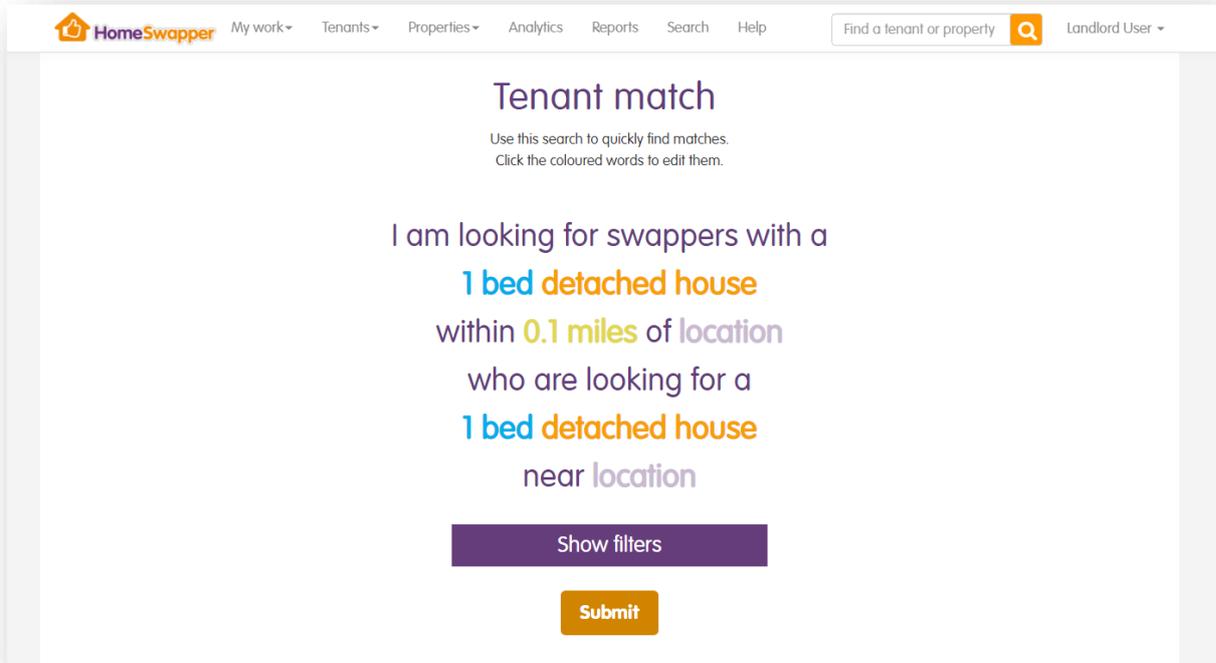
If a tenant does not log in for 6 months, we set their account to “*archived*”.

Archived accounts cannot be seen by other tenants, but you are still able to view them.

If they do not log in for a further 12 months, their account is deleted for GDPR reasons.

## Tenant Match

*Tenant Match* is a quick tool for finding matches for your tenants. For example, you may be talking to a customer about their housing options and can use this feature to show them the type of homes they would be matched with on **HomeSwapper** and encourage them to register.



To run a search, first enter details of the type of home they are interested in (“*I am looking for swappers with...*”). Do this by clicking on the number of bedrooms, property type, distance and location, and selecting what they want.



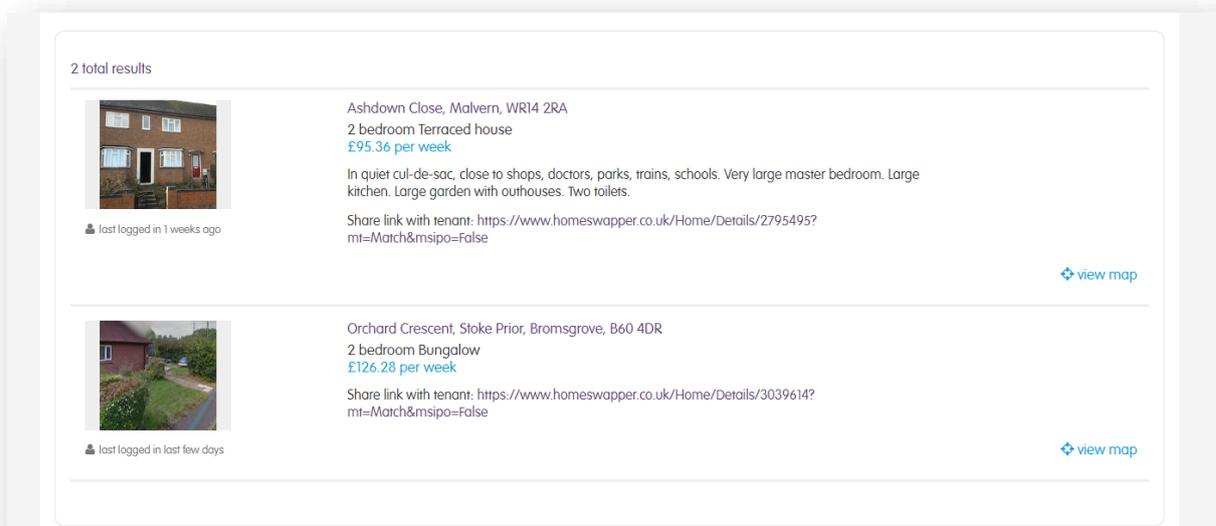
Next, do the same for the home the person currently has (“*who are looking for...*”), i.e. the number of bedrooms, type of home and location of where they are living now.

When you’re happy with the search criteria selected, click “*Submit*”.



**HomeSwapper** will now search the database for anyone who has a matching home and are looking for the type of home and location you’ve entered.

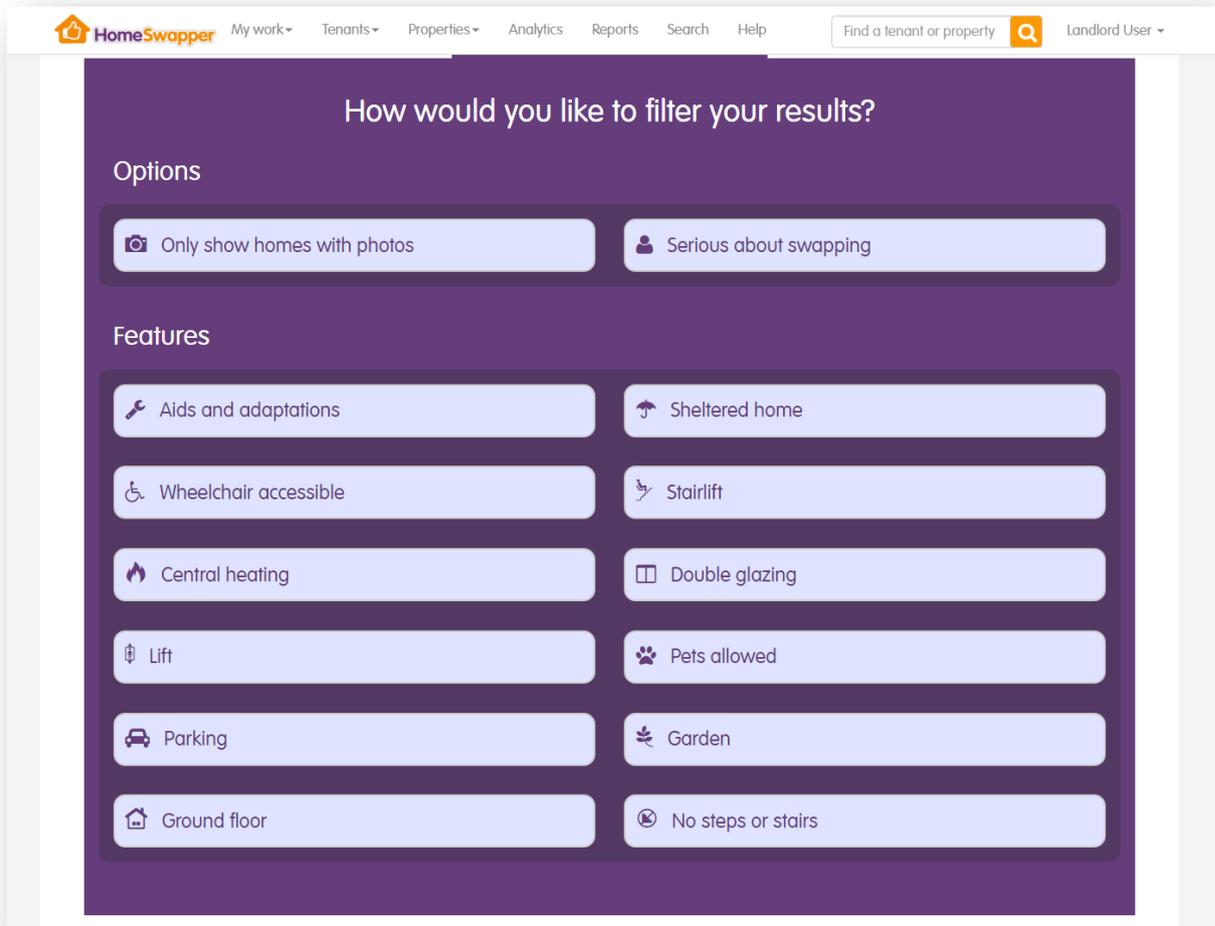
The search will include tenants for all landlords, not just your own.



To view more details of matching homes, click on the photo or the address. The home advert can also be printed if you wanted to give a copy to your tenant, or you can access the contact details for the home and pass those onto them.

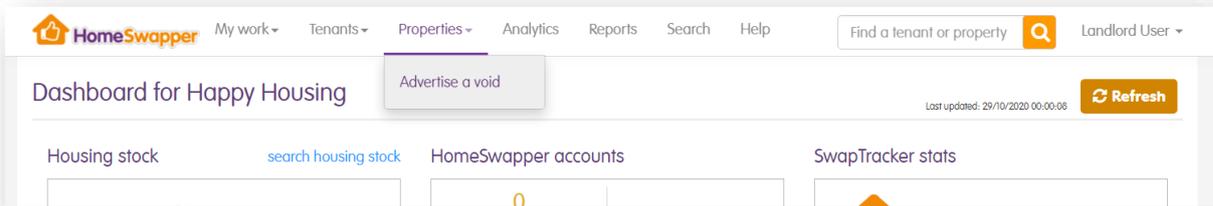
Each home also has a “share” link which will take them directly to the home advert. These could be emailed to your tenant.

If you want to refine the results further (e.g. just homes with photos), click on the “Show filters” button and select any additional criteria you want to apply to the search.



## PROPERTIES

The “*Properties*” area has one section – [Advertise a void](#).



### Advertise a Void

Using the “*Advertise a Void*” tool you can use **HomeSwapper** to advertise any immediately available homes you might have. For example, you may have tried to allocate them previously on your own CBL system but were unsuccessful.

Advertising on **HomeSwapper** gives you access to an audience of thousands of potential applicants. There are no additional costs for using this feature.

### Adding a void property

To add a void, enter the following information about the home you are advertising:

- Address – Note: **HomeSwapper** will never show the house number or house name on the website
- Type of property
- Number of bedrooms
- Rent / rent frequency
- Council tax band and amount (both are optional)
- Landlord name
- Type of tenancy
- Any age restrictions that may apply, e.g. Over 50's
- Property features, e.g. Central heating, Double glazing, etc.
- Local amenities, e.g. nearby bus stop, shops, etc.
- Special provisions - Is your home supported or sheltered or does it have disability adaptations? If yes, you will be asked to provide details.
- Your comments – use this to provide additional information about your home to help “sell” it to potential applicants
- Contact details – enter details of how potential applicants can contact you regarding this property. This is mandatory.

**Advertise a void**

**Basic details**

Address: 12 Bath Road, Worcester, Worcestershire, WR5 3EG [Change](#)

Type of property: Flat or studio

Number of bedrooms: 2

Rent: £ 150 per Week  
This should be the full amount, including service charges

Council tax: --Please select one-- £ per month

**Tenancy**

Landlord: Happy Housing

Type of tenancy: Introductory [What's this?](#)

Age restrictions apply

**Features**

Tick all that apply

Central heating  Lift  Parking

Double glazing  Pets allowed  Garden

**Local amenities**

What amenities do you have nearby?

Tick all that apply

Bus stop  Shops

Doctors' surgery or health centre  Primary school

Secondary school  Pub or social club

**Special provisions**

Is your home supported or sheltered or does it have disability adaptations?

No  Yes

**Your comments**

Please use this section to add any further information you would like to share with potential tenants about this home.

This lovely flat is available straight away.

**How can tenants contact you about this home?**

Record how the tenants can get in touch with your organisation about this void home. Try and put in useful information e.g. the times that you can be contacted and the different ways in which you can be reached.

Please contact Mr Bob Jones @ Happy Housing  
Tel. 0123 4567890

When you are happy with the details you have entered click “Save”:

**Who is this visible to?**

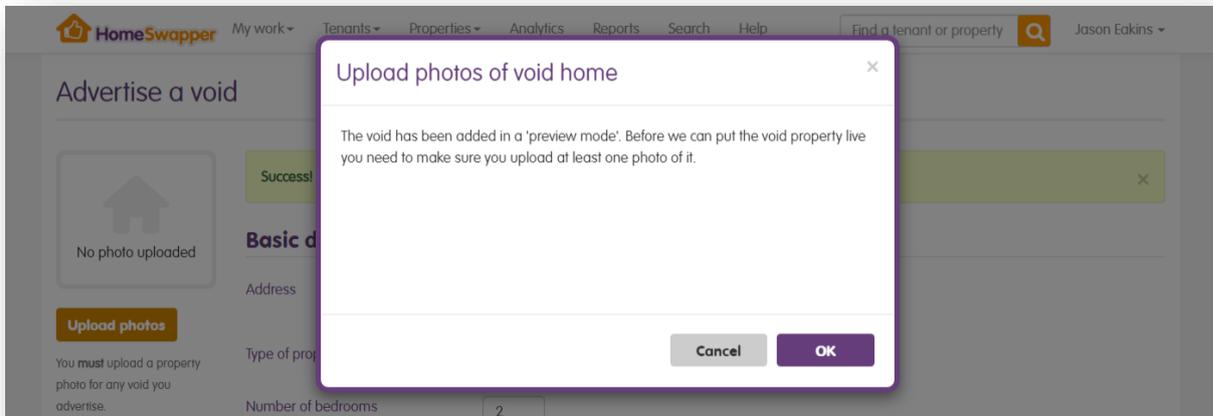
Which tenants do you want to see this home within their searches?

All tenants  Tenants in my group of landlords  My tenants  Everyone except my tenants

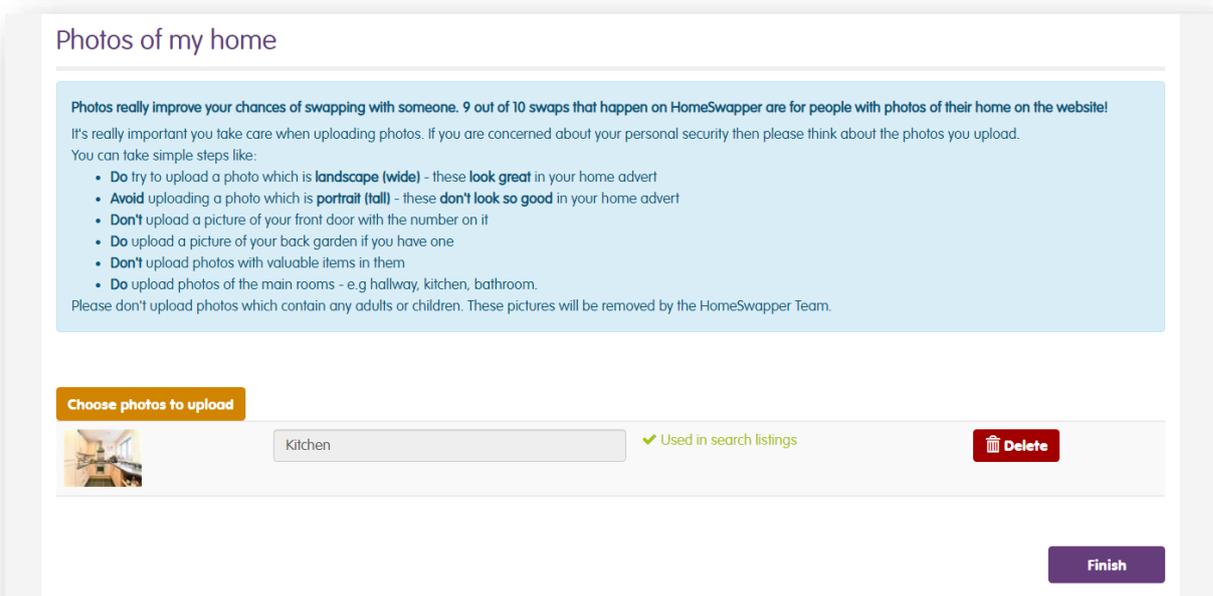
[Advertise](#) [What's this?](#) [Advertise and Promote](#) [What's this?](#) [Save](#)

## Uploading photos

Your home will not be advertised straight away. Void properties cannot be advertised without at least one photograph added.



If you're ready to add photos, click "OK". Otherwise, click "Cancel" and you can return to this page later.



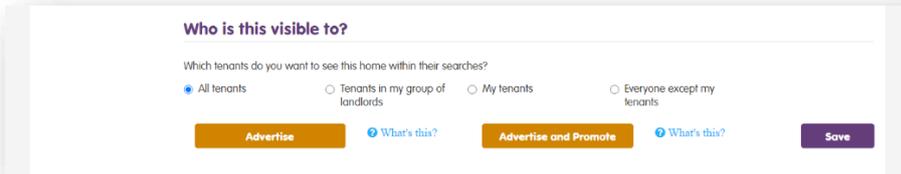
To upload photos, click on the "Choose photos to upload" button. You can then select the images you want to upload, rotate them if necessary, and choose a description that best fits, e.g. "Kitchen", "Lounge", etc.

When you are happy with the photos you have added, click "Finish".

## Advertising / Promoting your home

The final step is to choose who you want to advertise your property to.

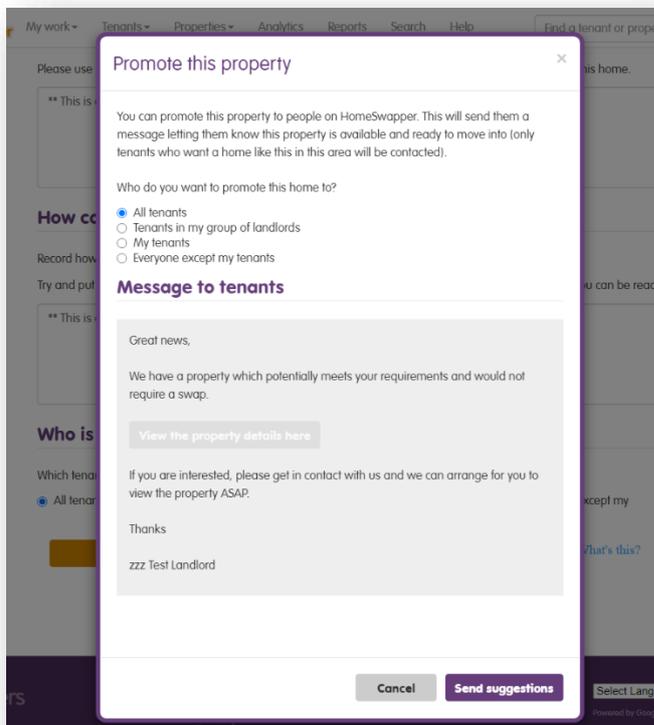
You can choose so everybody on **HomeSwapper** will see it or restrict it to just your tenants (or tenants of your group), or even everyone except your tenants.



When you've decided who you want to advertise to, choose if you just want to "Advertise" the home (i.e. just publish it on the website and match with potential applicants), or "Advertise and Promote".

If you select "Advertise and Promote" not only will the property be advertised on the website and matched to potential applicants, a message will also be sent to anyone on **HomeSwapper** whose requirements match your void.

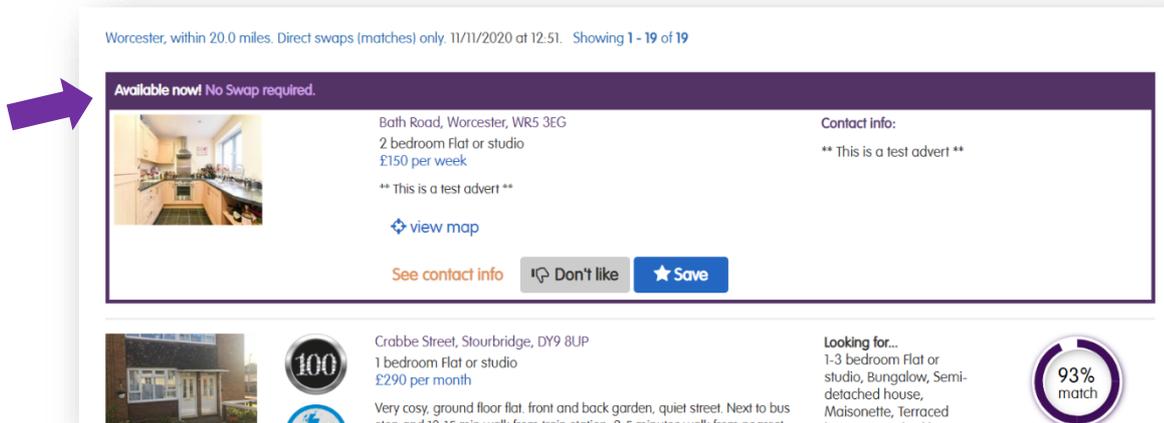
As with advertising the home, you can also choose who want to message, i.e. everyone who matches, just your tenants (or tenants of your group) or everyone except your tenants.



Clicking “Send suggestions” will publish your home and automatically send a message to those matching tenants.

### How void homes appear to tenants

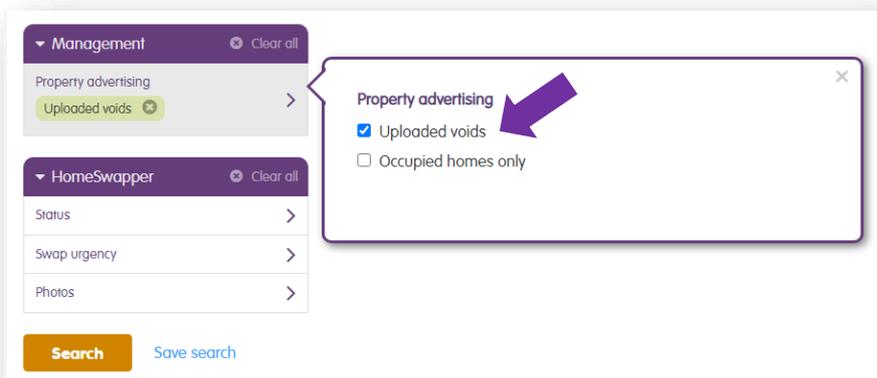
To avoid confusion for HomeSwapper tenants, void homes are clearly marked as “Available now! No Swap required”.



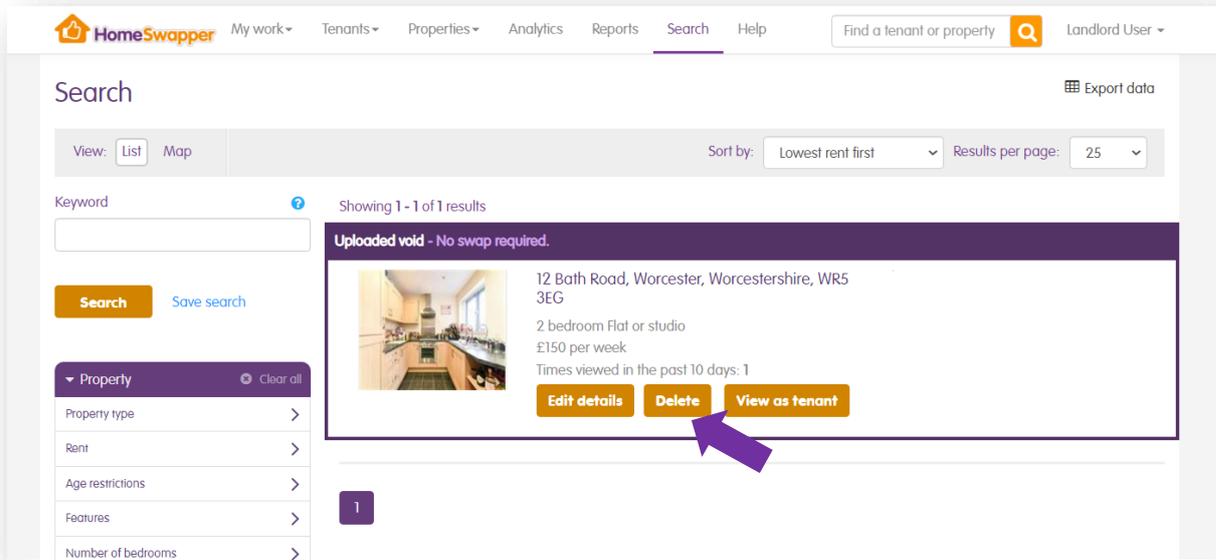
To apply for a void, they would use the contact information you provided on the advert.

### Removing a void

To access your saved voids, you can either click on the “Void homes” total on your Dashboard, or selecting the “Uploaded voids” filter on the “Property advertising” criteria of the [Search](#) page:

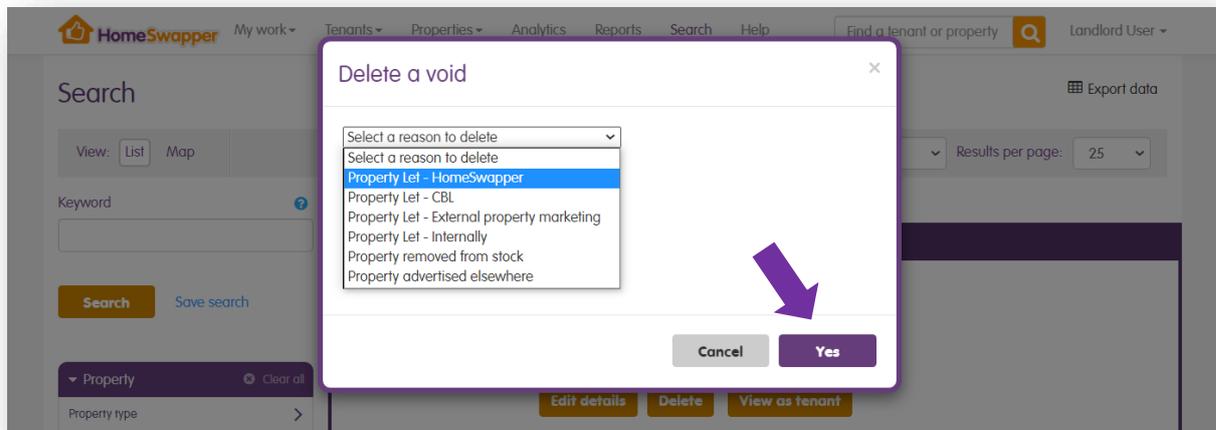


To remove a void, click on the “Delete” button:



You will then be prompted to provide a reason why you are removing it.

Select the most appropriate reason from the list and click “Yes” to delete your void.



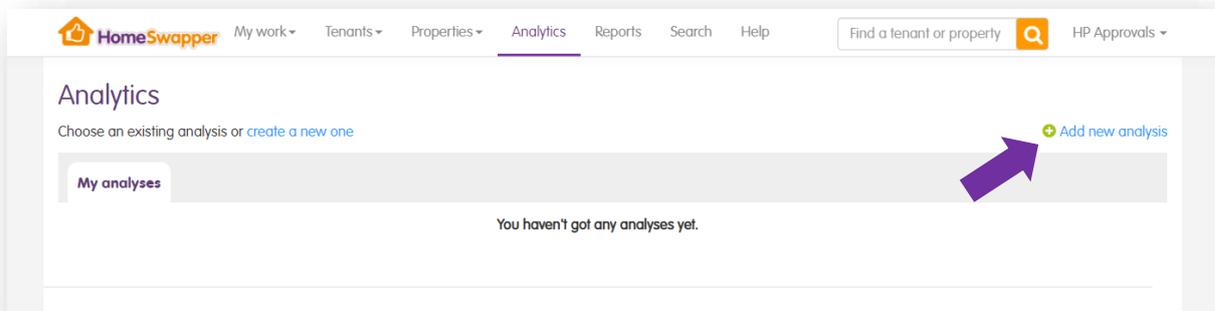
## ANALYTICS

### My Analyses

The Analytics page enables you to view all the data relating to your tenants in easy to understand Venn diagrams and build your own custom reports.

### Building your own “Analysis” report

To add a new “Analysis” click “Add new analysis”:



You’ll now be prompted to add “metrics”, i.e. criteria relating the information you want to get out.

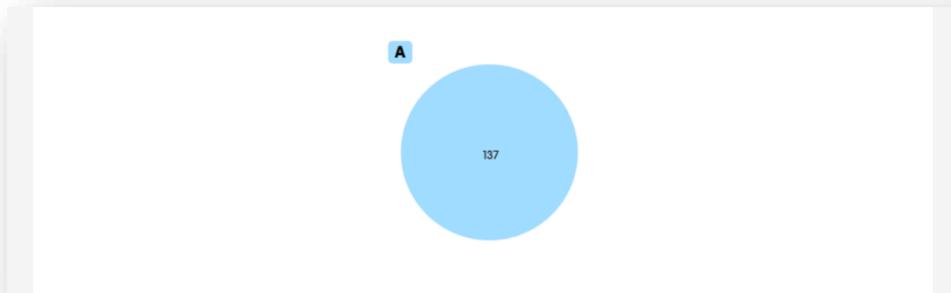
If you’re only interested in current registered tenants (not swapped or archived), tick the “Only include live tenants” box.

To add your first “metric” (i.e. search criteria), click on “Add metric to compare”:



In the top box, select the criteria you want to use, and in the bottom box choose the value, e.g. here we are selecting a criteria of “Age range” and a value of “65-74”.

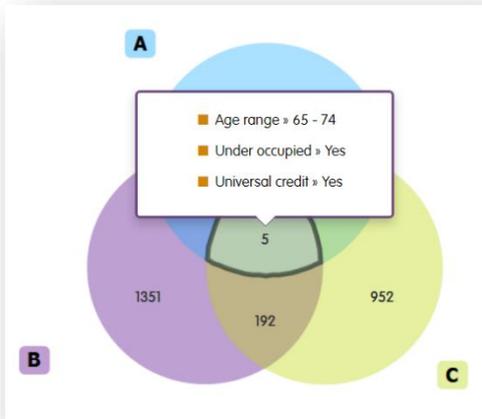
The system will then check the database for how many of your tenants match this criteria, and show this as a circle in a Venn Diagram:



If you add more metrics, more circles are added. Each segment will show how many of your tenants each criteria relates to:

Segment	Count
A only	84
B only	1351
C only	952
A and B	39
A and C	9
B and C	192
All three (A, B, and C)	5

If you hover your mouse over any of the segments, you can see the criteria being used for each:



Clicking on any of the segments will then show you a list of tenants matching that criteria:

Reference	Lead Tenant	Address
1312769	jessica richardson	4 Schallenger Walk, Stoughton, Lincolnshire NG3 4JH
1519357	Yvonne Neale	The Forge, Bungalows Hill Road, Southwell, Nottinghamshire NG20 8LJ
1633351	Wesley Jones	21 St. Johns Crescent, Southwell, Nottinghamshire NG20 8JZ
1856697	Carlisle Murray	26 East View Close, Wignanton, Chapter 10, Leicestershire NG24 5UP
1893116	Alan Andrews	3 Ladbroke Close, Southwell, Nottinghamshire NG20 7ND

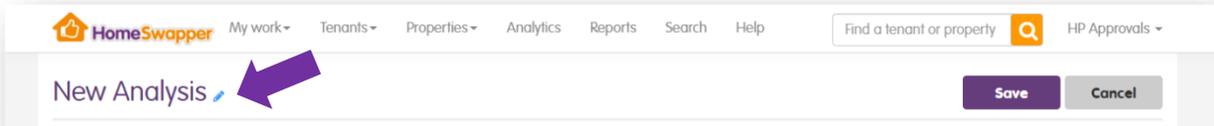
You can also export this information into an Excel spreadsheet by clicking “*Export data*”.

To get back to your Venn Diagram, click the “*Back to chart*” link.

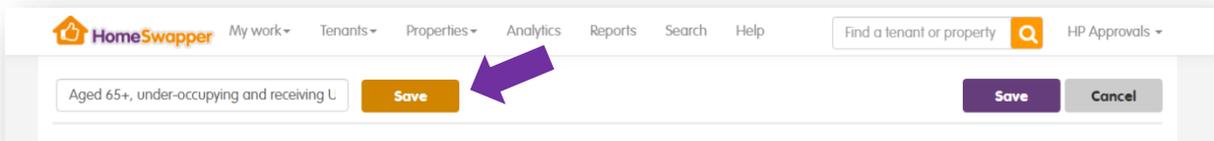
## Saving your report

If you want to save your “Analysis” so you can use it again in the future, first give it a meaningful name.

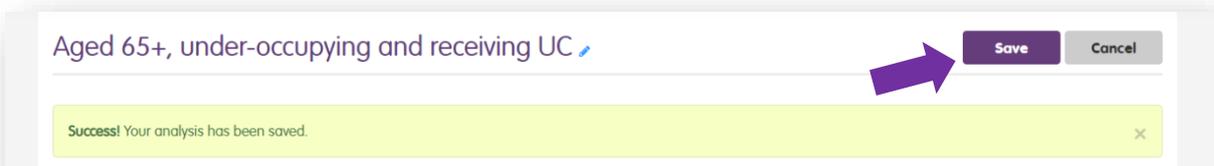
To do this, click on the pencil icon by the name:



Enter a name that describes the report you created and click “Save”:

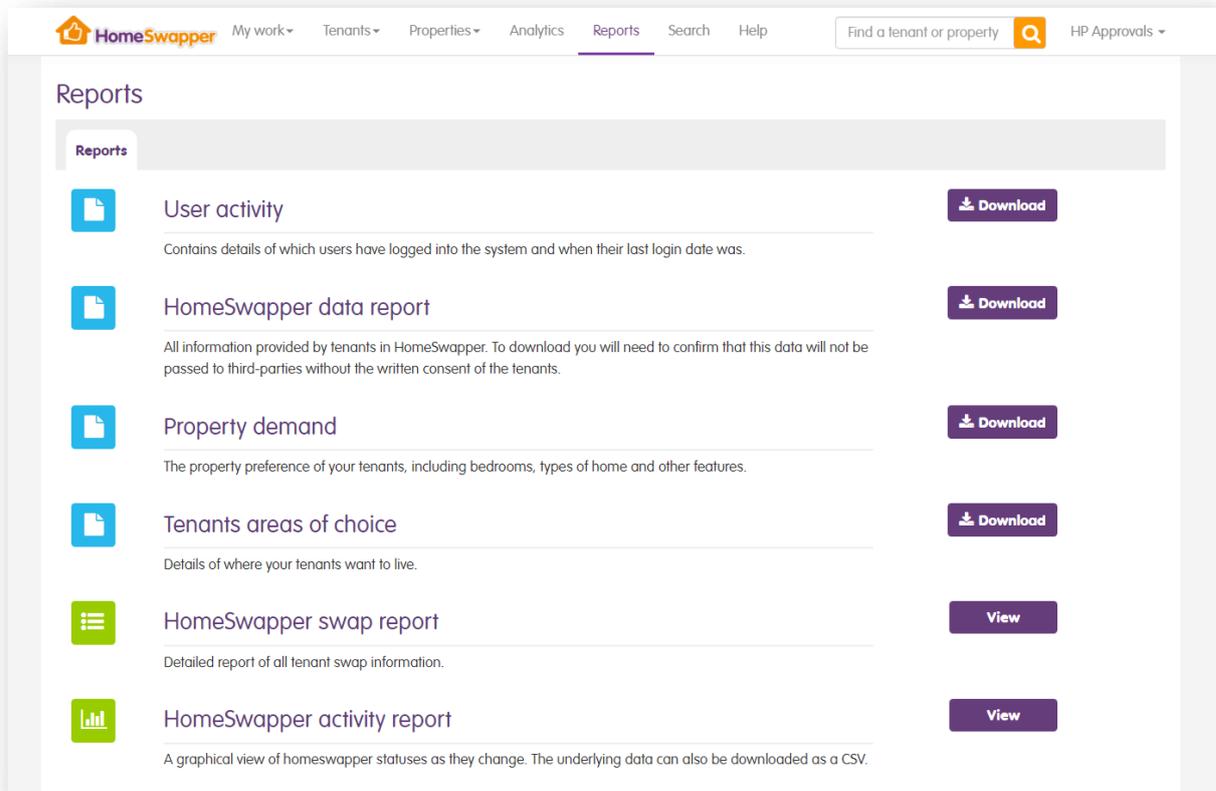


Finally, click the “Save” button and your Analysis will be available to run again or amend, next time you go to the “Analytics” section.



## REPORTS

HomeSwapper comes with a suite of comprehensive reports you can download in Microsoft Excel.



### User activity

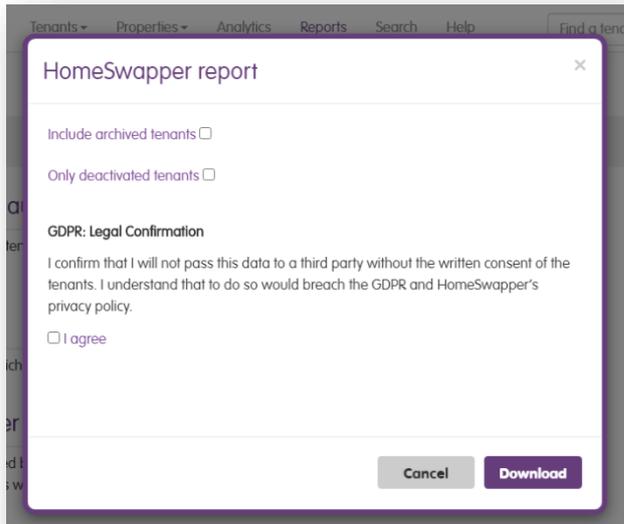
This report allows you to see which landlord users in your organisation have logged into the system and when their last login date was.

### HomeSwapper data report

This report gives you all the information provided by your tenants when they registered for HomeSwapper.

For GDPR reasons, you cannot download this report without confirming that this data will not be passed to third parties without the written consent of the tenants.

By default, this report only includes your current registered tenants, i.e. not archived. If you want to include these, tick the relevant box.



## Property demand

This report shows your property preferences of your tenants.

For example, the type of properties they want, number of bedrooms and what features they require, e.g. Double glazing, Garden, etc.

For GDPR reasons, you cannot download this report without confirming that this data will not be passed to third parties without the written consent of the tenants.

## Tenants areas of choice

This report shows you where your tenants want to move to, including the place name (or postcode) and the number of miles from that location.

This information can be used by your organisation when deciding where new stock should be built or acquired.

For GDPR reasons, you cannot download this report without confirming that this data will not be passed to third parties without the written consent of the tenants.

## HomeSwapper swap report

Clicking “View” takes you to your “Tenant Swaps” list for the last 12 months:

The screenshot shows the HomeSwapper web interface for the 'Tenant Swaps' report. At the top, there is a navigation bar with 'HomeSwapper' logo and menu items like 'My work', 'Tenants', 'Properties', 'Analytics', 'Reports', 'Search', and 'Help'. A search bar contains 'Find a tenant or property' and 'HP Approvals'. Below the navigation, the page title is 'Tenant Swaps' and there are export options: 'Full Export' and '12 Month export'. A summary line states 'Total number of swaps in the last 12 months (November 2019 - October 2020): 183'. A pagination control shows '1 2 3 ... Next Last' and 'Showing 1 - 10 of 183 results'. The main content is a table with the following data:

Tenant Name	Date of move	Type of move	Landlord	From Address	Previous I
Laura Hanson	31/10/2020	PartOfAMultiswap	Happy Housing	96, Whitehills, Cotgrove Nottingham, Nottinghamshire, NG12 3PP	
Kayleigh Coulson	30/10/2020		Happy Housing	96, West Close Worcester, Worcestershire, WR5 1AH	
Luke Edwards	29/10/2020		Happy Housing	79, Regent Woodrow, Droitwich, Worcestershire, WR9 8JU	
Roy Brown	28/10/2020		Happy Housing	7, Ashdown Close, Malvern, Worcestershire, WR14 2RA	
arnest ogden	24/10/2020		Happy Housing	5, Conker Close Alford, Lincolnshire, LN13 9FD	
G. Waite	22/10/2020		Happy Housing	102, Blackfriars Court, Blackfriars Avenue, Droitwich, Worcestershire, WR9 8RX	
Adam Johnson	22/10/2020		Happy Housing	41, Paper Hedges Road, Birmingham, West Midlands, B24 0LY	
Kate Spang	20/10/2020		Happy Housing	36, School Road, Warfield, Droitwich, Worcestershire, WR9 7PU	
Kathy Brockwell	18/10/2020	ADirectSwapWithAnotherTenant	Happy Housing	4, Church House, Walker Street, Derby, Derbyshire, DE72 3PU	
Simon Blackford	18/10/2020		Happy Housing	5, Cowdly Gardens, Droitwich, Worcestershire, WR9 7TQ	

At the bottom of the table, there is another pagination control: '1 2 3 ... Next Last' and 'Showing 1 - 10 of 183 results'.

This includes all your tenants who have swapped in the last 12 months.

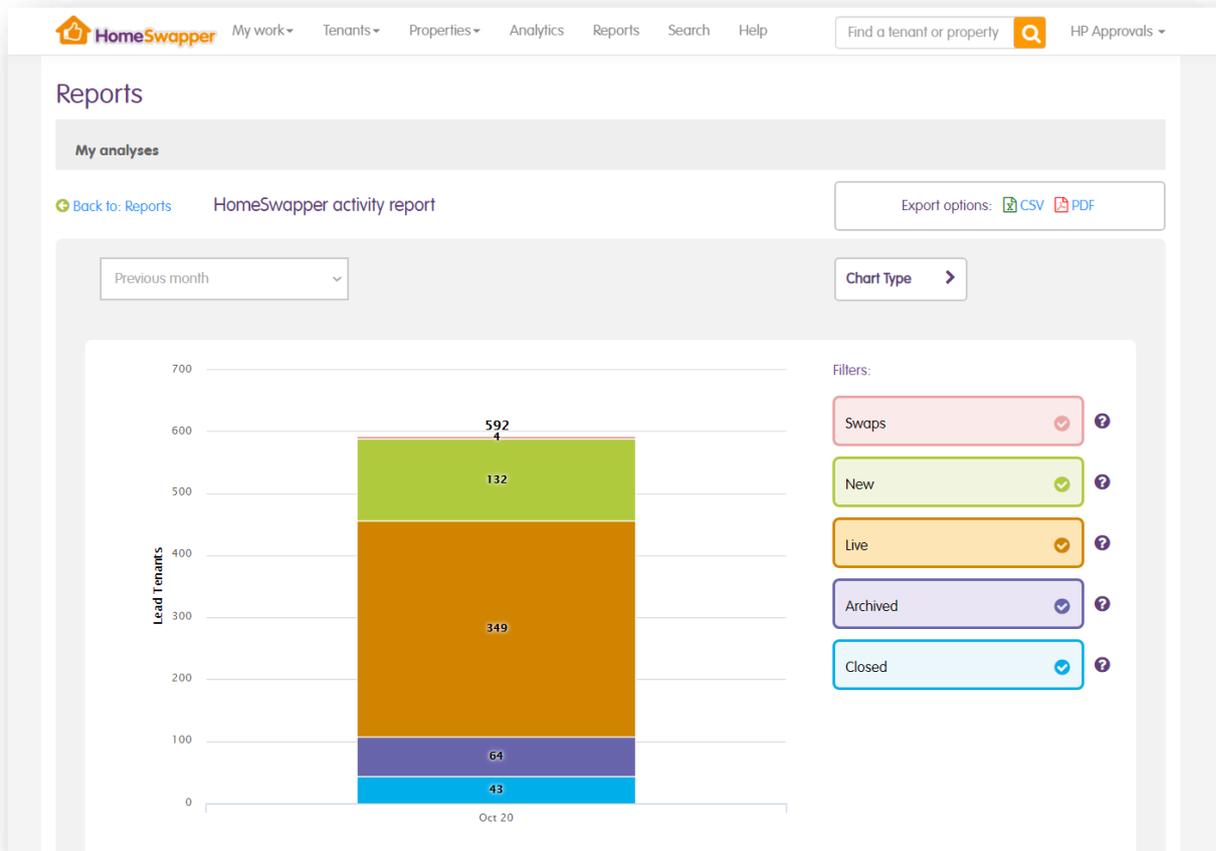
You can export this information to Microsoft Excel by clicking the “12 month export” icon at the top of the page. To export all your recorded swaps (not just the last 12 months) click the “Full export” icon.

Export options: Full Export 12 Month export

Where the tenant has recorded full details of the swap, the report also shows the address and landlord they are moving to.

## HomeSwapper activity report

Clicking “View” takes you to a graphical view of your tenants’ **HomeSwapper** statuses as they change over time. The underlying data can also be downloaded as a CSV or a PDF file.



Clicking any of the numbers in the chart takes you to a list of the tenants they represent.

By default, a bar chart is displayed, but you can also change the “Chart Type” to use a pie chart or line graph.

The statuses are:

- **Swaps** - Shows swaps recorded that month (by tenant or landlord).
- **New** - Shows when tenants have completed the registration of their account.
- **Live** - Shows tenant accounts with full membership at the time (approved or paying).
- **Archived** - Shows when a tenant account has been auto-archived after 6 months of inactivity or manually by their landlord.
- **Closed** - Shows tenant accounts that have been closed.

Changing the date period selection will show you how the breakdown of these statuses changed during that time frame.



### CRA financial audit

If you have [Pre-Tenancy Financial Assessments \(SafeStart\)](#) you can download a report of the tenant checks your organisation has completed including name, address, date of search and the user who ran the search.

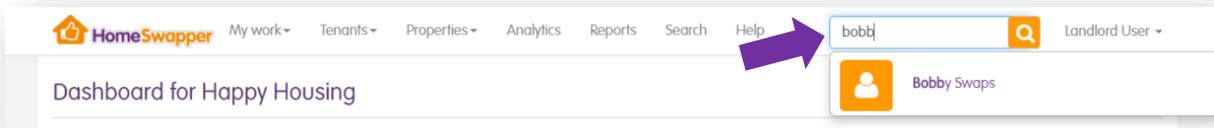
## SEARCHING

### Quick Search

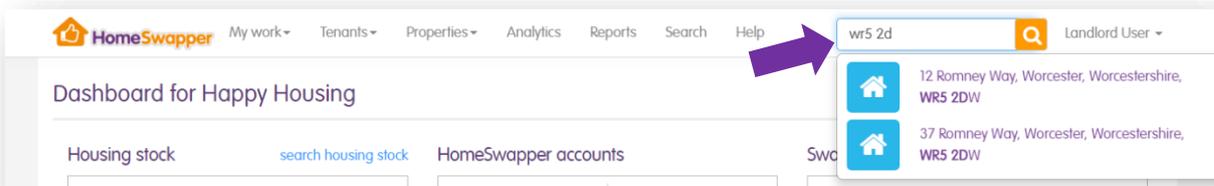
To quickly find a tenant or home, use the *Quick Search* box in the top menu.

You can search by tenant name or their address. As you type, a list of matching people or properties are shown.

#### Searching by tenant name:



#### Searching by property address:

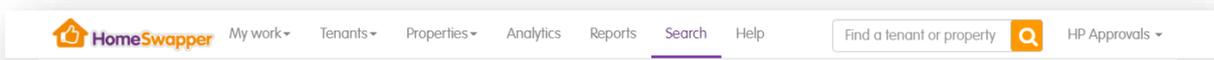


Clicking on any name or address in the list will take you to their details.

If there are too many results found, click the magnifying glass icon to go to a list of all matching records.

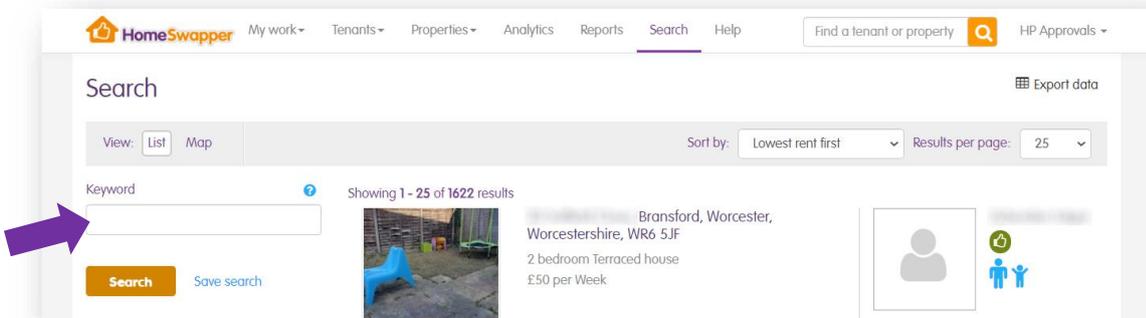
### Advanced Search

To do an advanced search, click on the “*Search*” option in the top menu:



## Keyword search

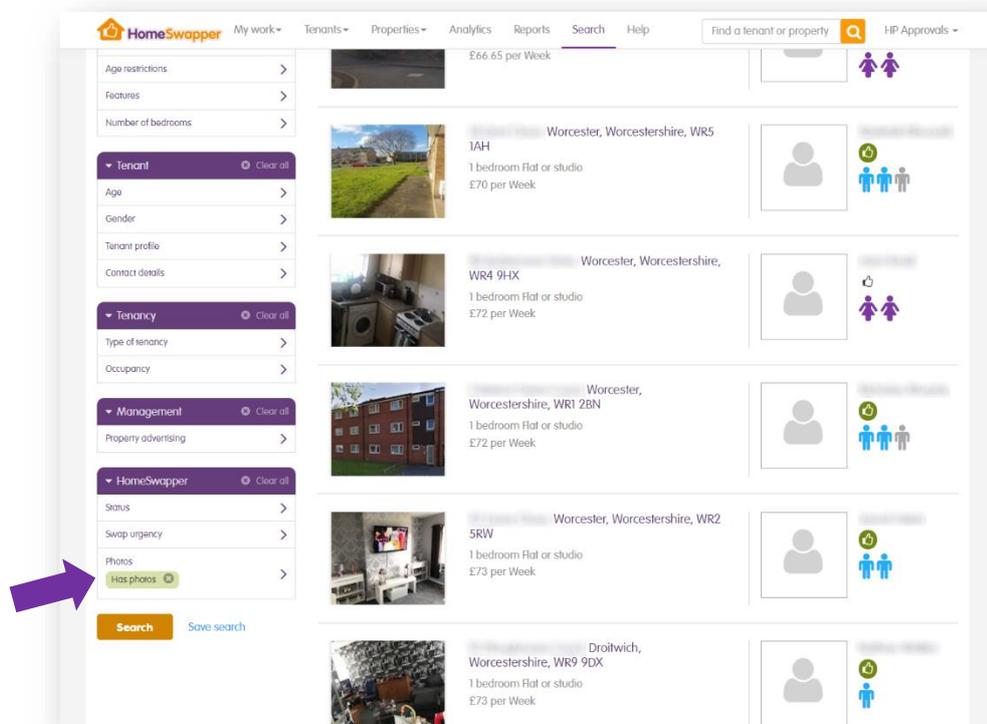
To search for a specific person or property, use the Keyword search. Enter part of tenant's name or address and click "Search".



## Search filters

For a more advanced search, you can use the filters on the left of the page.

These allow you to narrow down your results to specific conditions, e.g. only homes with photos. Select however many filters you want and click "Search".

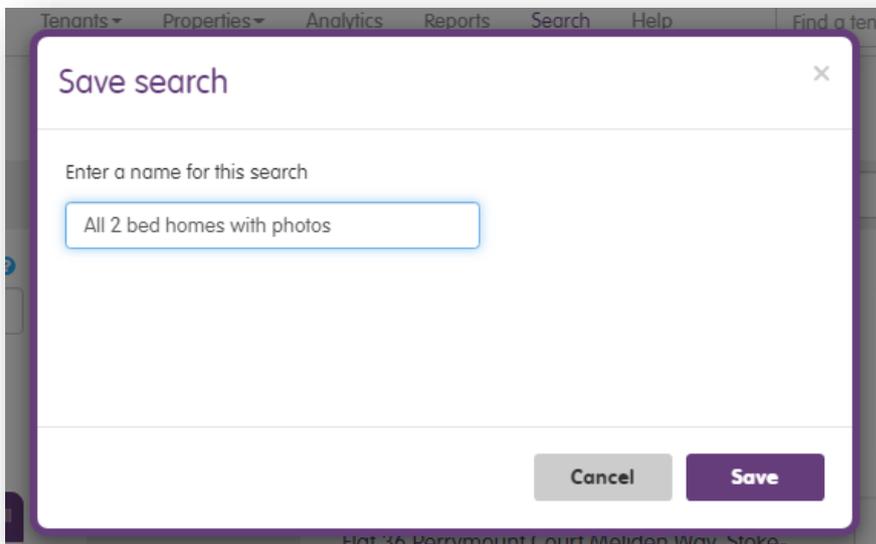


## Saving your searches

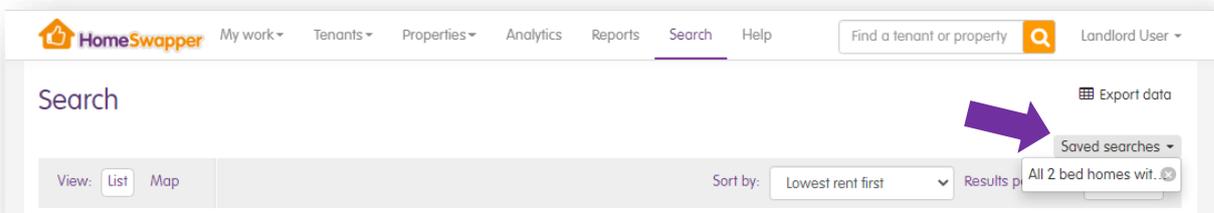
If you do a search that may be useful to keep for future use, you can save them by clicking the “Save search” link:



You’ll then be prompted to give your search a name. Choose something descriptive so you’ll easily know exactly what did, then click “Save”.



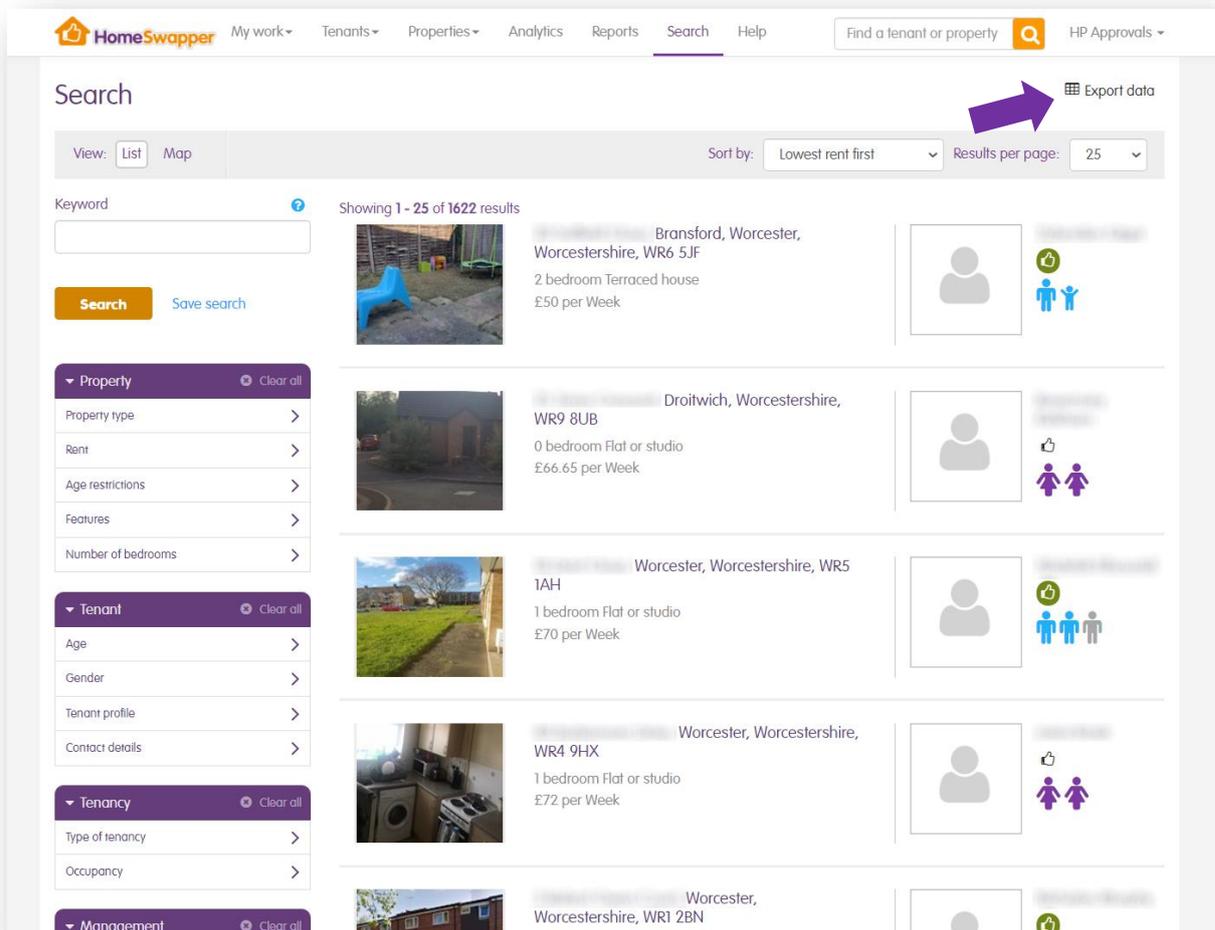
All your saved searches can be run again by selecting them from your “Saved searches” list:



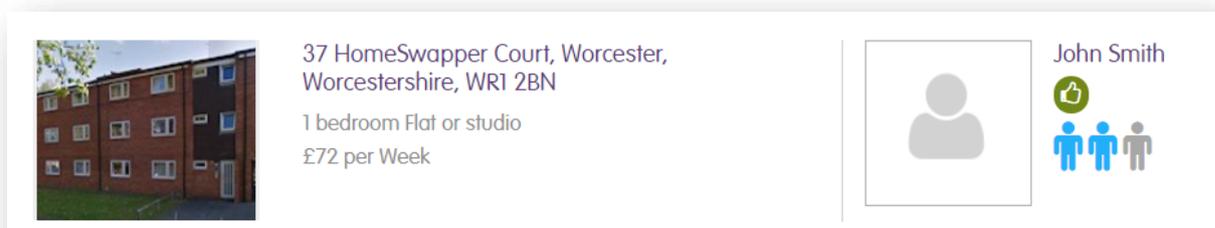
To remove a search, click on the “x” icon next to it’s name.

## Search results

You can change the sort order of the search results, the number of results displayed per page and also download the results in Excel format by clicking “*Export data*”:



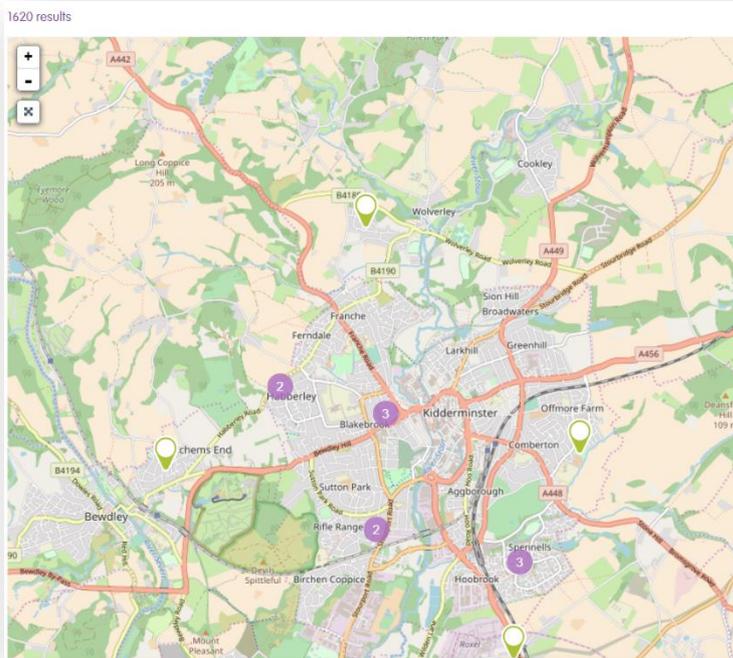
Each result shows details of the property on the left and the tenant on the right (including their household composition, e.g. single person, couple, etc).



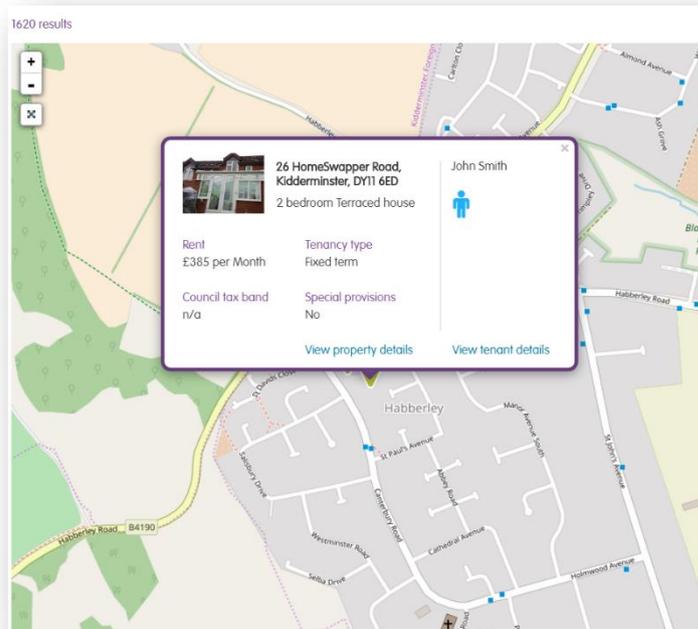
The thumb icon represents the current status of their **HomeSwapper** account.



Clicking on a circle (or zooming in on the map) will drill-down further. Again, each circle represents the number of tenants/homes in that area, and clicking on these will zoom in even further.



When you get down to a level where individual homes are shown, you can click on these to see details of the tenant/home.



## Property Overview Page

The *Property Overview Page* shows the key information your tenant has entered about their home.

The screenshot displays the HomeSwapper interface for a property overview. At the top, there is a navigation bar with the HomeSwapper logo, user menu, and search bar. The main content area shows the property address: 12 Romney Way, Worcester, Worcestershire, WR5 2DW. Below the address, the tenant's name Bobby Swaps is listed, along with a note that the tenancy start date is not available. The page is divided into sections: Basic details, Tenancy status, Features, and Special provisions. The Basic details section includes fields for Address, Type of property (Flat or studio), Number of bedrooms (2), Net rent (£ 100.00 per Week), and Council tax band (Unknown). The Tenancy status section shows Landlord (Happy Housing), Lead tenant (Bobby Swaps), and Tenancy type (Assured). The Features section has checkboxes for Central heating, Double glazing, Lift, Pets allowed, Parking, and Garden. The Special provisions section asks if the home is supported or sheltered, with radio buttons for No and Yes. A Save button and a Cancel button are located on the right side of the form.

If you wish (for example, the tenant has entered the incorrect tenancy type) you can change this information. Make the necessary amendments and click “Save”.

## Tenant Overview Page

The *Tenant Overview Page* shows the key information your tenant has entered about themselves and their household.

The screenshot shows the HomeSwapper Tenant Overview Page for a tenant named Bobby Swaps. The page is divided into several sections:

- Header:** HomeSwapper logo, navigation menu (My work, Tenants, Properties, Analytics, Reports, Search, Help), search bar, and user profile (Landlord User).
- Property Address:** 12 Romney Way, Worcester, Worcestershire, WR5 2DW.
- HomeSwapper Record:** Includes a 'Log in as this tenant' button and a 'Create MX Application' button.
- Identity Section:**
  - Username: bobby.swaps123@housingpartners.c
  - First name: Bobby
  - Last name: Swaps
  - Date of birth: 1 January 1976
  - Gender: Male (selected)
- Contact details Section:**
  - Address: 12 Romney Way, Worcester, Worcestershire, WR5 2DW
  - Email Address: bobby.swaps123@housingpartners.c
  - Home phone, Work phone, and Mobile phone fields are empty.
- Contact preferences Section:**
  - The tenant has indicated that they would prefer to receive system notifications by:
    - Email
    - Email and text
    - Text only
    - None
- Financial information Section:**
  - Housing benefit:
    - Full amount
    - Only part
    - Do not receive
- Co-habitants Section:**

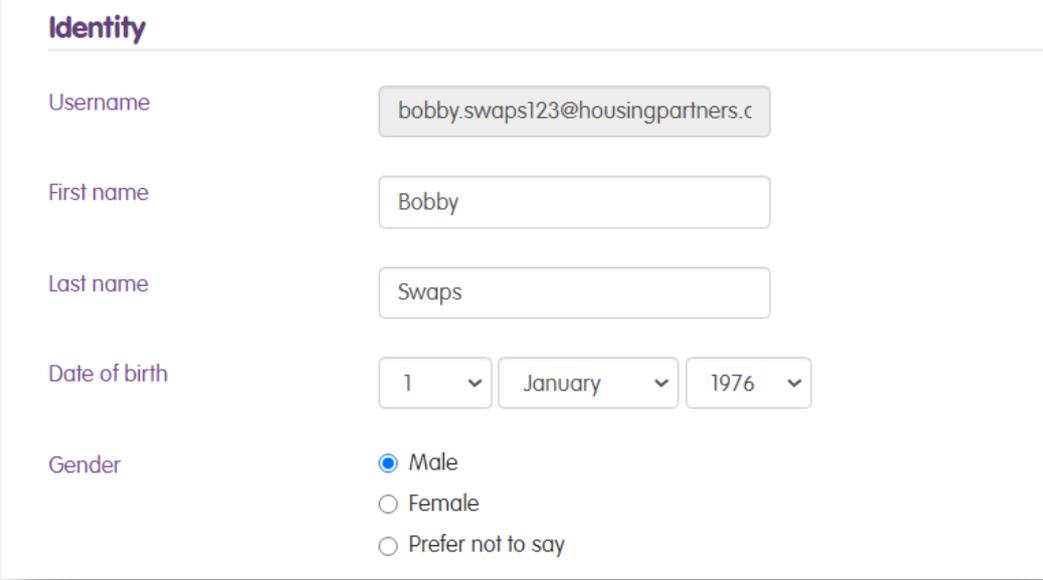
Gender	Date of birth	Relation	Now	Future	
Male	01/01/1976	N/A		✓	Edit
- Additional Information:**
  - Number of couples sharing a room: 0
  - Number of couples who will share a room after you've swapped home: 0
- Footer:** Save and Back buttons.

On the right side of the page, there is a 'HomeSwapper Statistics' section showing 'Landlord: zzz Test Landlord', 'Account Status: Live - approved', and 'Reference: No Reference'. Below this is a 'Has this tenant swapped?' prompt with buttons for 'Record quick swap' and 'Record full swap'.

## Identity

This section shows the tenant's name, date of birth and gender.

You may change any of this information if you wish except for their **HomeSwapper** username.

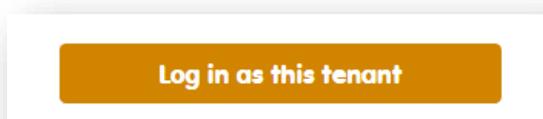


The screenshot shows a form titled "Identity" with the following fields:

- Username:** bobby.swaps123@housingpartners.c
- First name:** Bobby
- Last name:** Swaps
- Date of birth:** 1 January 1976
- Gender:**  Male,  Female,  Prefer not to say

## Log in as your tenant

Use the “Log in as this tenant” button to log into their **HomeSwapper** account.



This allows you to see what they see on the **HomeSwapper** website, e.g. you can see all the homes they have been matched with.

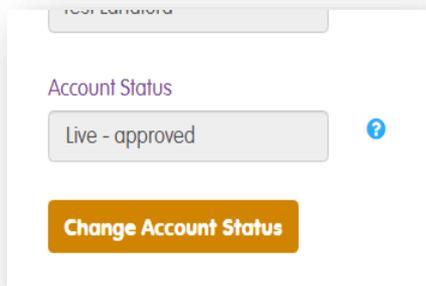
Note: due to the GDPR restrictions, you cannot see their private messages. However, you can access all other areas and update their details if required.

For example, some landlords support vulnerable tenants, those without internet access or the non-IT savvy, by setting up and administering their **HomeSwapper** account for them.

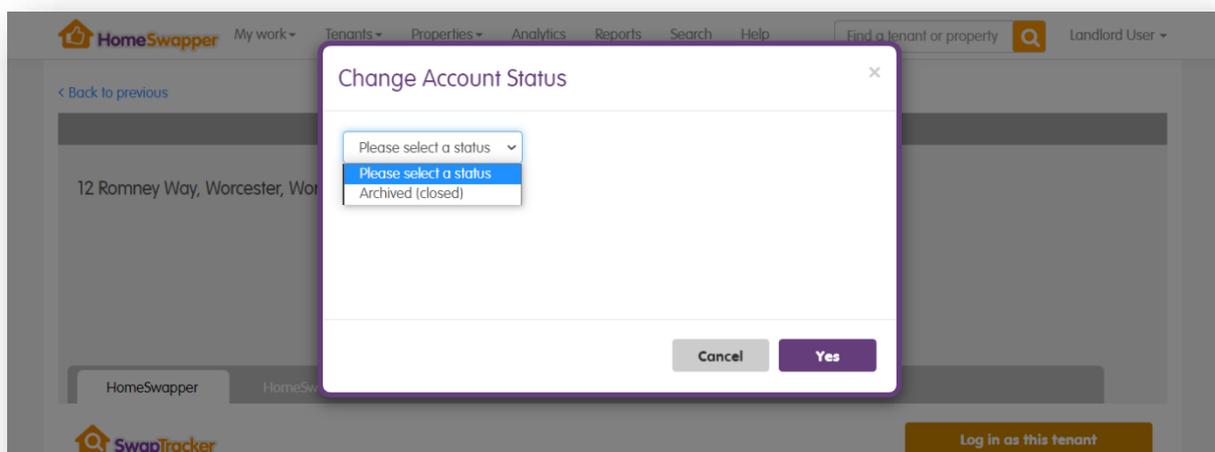
Logging in as your tenant is a “*silent login*” meaning the tenant will not be aware you have logged in as them.

## Changing a tenant's account status

If you need to change the tenant's account status, click on the “*Change Account Status*” button:



Select the new status from the list available, and click “Yes” to confirm.



Examples of when you may need to change your tenant's account status are:

- **Closing their account** – set the status to “Archived (closed)”.
- **Approving their account** – if you previously rejected their **HomeSwapper** account, you can change the status to “*Live – approved*” to authorise them at a later date.

For example, you may have rejected them because of an address discrepancy which they have now corrected.

## Contact details

This section shows the contact details your tenant has provided.

You can amend any of this if you wish, except for their email address which can only be changed by [logging in as the tenant](#).

**Contact details**

---

Address 12 Romney Way, Worcester, Worcestershire, WR5 2DW  
**Change**

To update the tenants email address please use the Log in as a tenant button and go to My details > My account.

Email Address bobby.swaps123@housingpartners.c

Home phone

Work phone

Mobile phone

## Co-habitants (Household details)

In this section you can view details of your tenant's household and update them if required.

**Co-habitants**

---

Gender	Date of birth	Relation	Now	Future	
Male	01/01/1976		N/A	✓	<span style="background-color: #f15a24; color: white; padding: 5px 10px; border-radius: 3px;">Edit</span> <span style="margin-left: 10px;"></span>

+ Add Person

Number of couples sharing a room 0

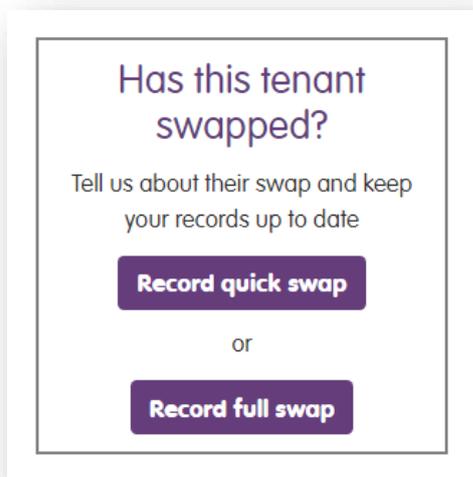
Number of couples who will share a room after you've swapped home 0

## Recording a swap

If you know your tenant has swapped and they've not recorded this themselves on **HomeSwapper**, you can record it here.

Regardless of whether your tenant found a swap on **HomeSwapper** or by another method, it's important to do this because it keeps the system up to date for other potential swappers and ensures your organisation has accurate swap data for your reporting.

There are two options:



### *Record quick swap*

This is the simplest way to record a swap. The swap is recorded and the tenant's account is closed.

For better reporting, if you know more details about where the tenant is moving to, it is recommended that you always record a full swap instead.

### Record full swap

Before the swap is recorded and the account is closed, you are able to enter more details about the swap, e.g. where they went, who their new landlord is, etc.

The full swap information you can enter is:

- Postcode/address of their new home
- Move in date (if known)
- Their new landlord's name
- The number of bedrooms the new property has
- Swap type, i.e. a direct swap (2-way) or a multi-swap (3 or more parties)

In addition to the above, you can also provide any feedback the tenant might have had regarding the **HomeSwapper** service. However, this field is optional.

This is because the form to record a full swap is the same as the tenant uses when they do that same thing.

**HomeSwapper Testimony**

How did you find HomeSwapper?

How did you find the HomeSwapper experience? Please do tell us and all about the swap you have found. Your comment will be shared with HomeSwapper and also other tenants who are still looking for a swap.

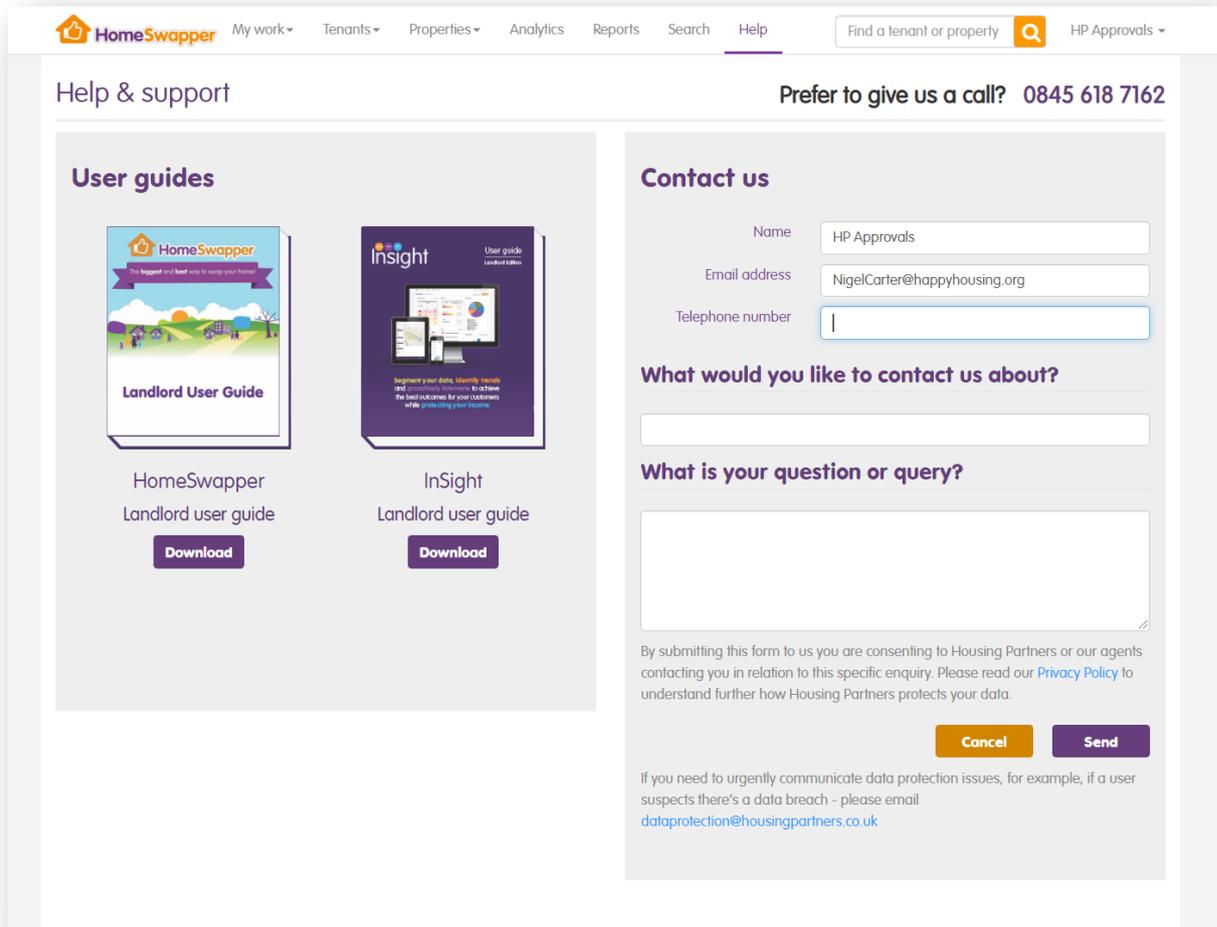
  

When you are happy with the swap details you have entered, click on the “*Send*” button.

The tenant’s account status will then be set to “*Swapped*”.

**STILL NEED HELP?**

If you need any help or would like to get in touch about anything **HomeSwapper** related, please contact us using the *Contact Us* form or landlords only telephone number (within office hours).



Alternatively, you can email us directly - [landlords@homeswapper.co.uk](mailto:landlords@homeswapper.co.uk).

Please note: we do not have a support telephone number for tenants, but they do have a dedicated email address they can use - [tenants@homeswapper.co.uk](mailto:tenants@homeswapper.co.uk)

We love talking about swapping homes. Please do get in touch if you are running a tenant event of any kind and we will always do our best to attend.