



Landlord User Guide v1.9

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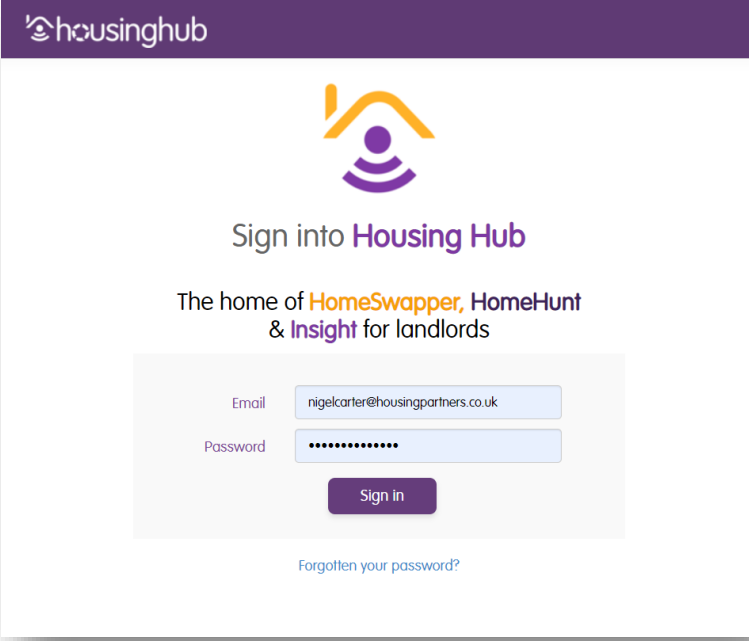
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INTRODUCTION

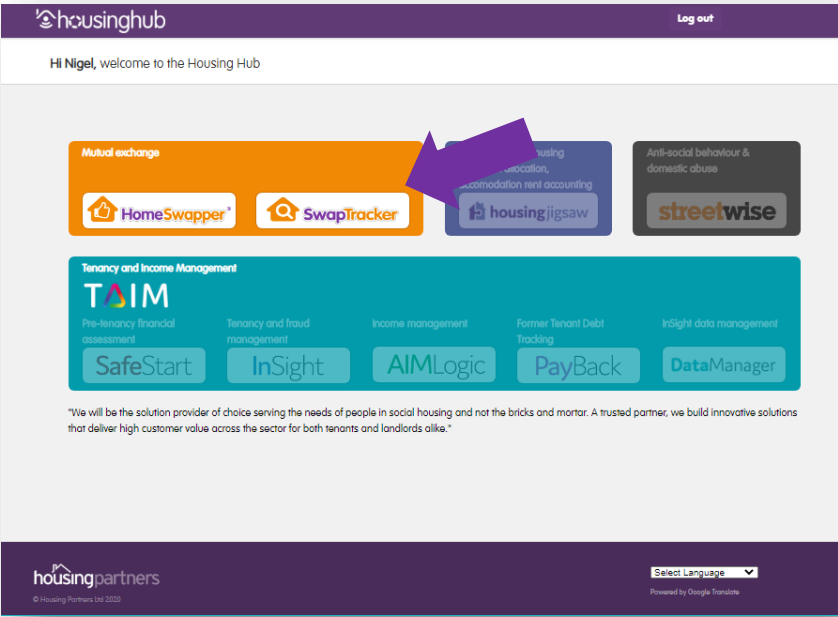
Logging in

SwapTracker is accessed by logging into the “Housing Hub”.



The screenshot shows the Housing Hub login interface. At the top is the 'housinghub' logo. Below it is a stylized house icon with a person inside. The text 'Sign into Housing Hub' is centered. Underneath, it says 'The home of HomeSwapper, HomeHunt & Insight for landlords'. There is a login form with fields for 'Email' (containing 'nigelcarter@housingpartners.co.uk') and 'Password' (masked with dots). A 'Sign in' button is below the password field. At the bottom, there is a link for 'Forgotten your password?'.

If you have a SwapTracker subscription, a new panel is shown on the list of tools available. Click this to go to your SwapTracker dashboard.

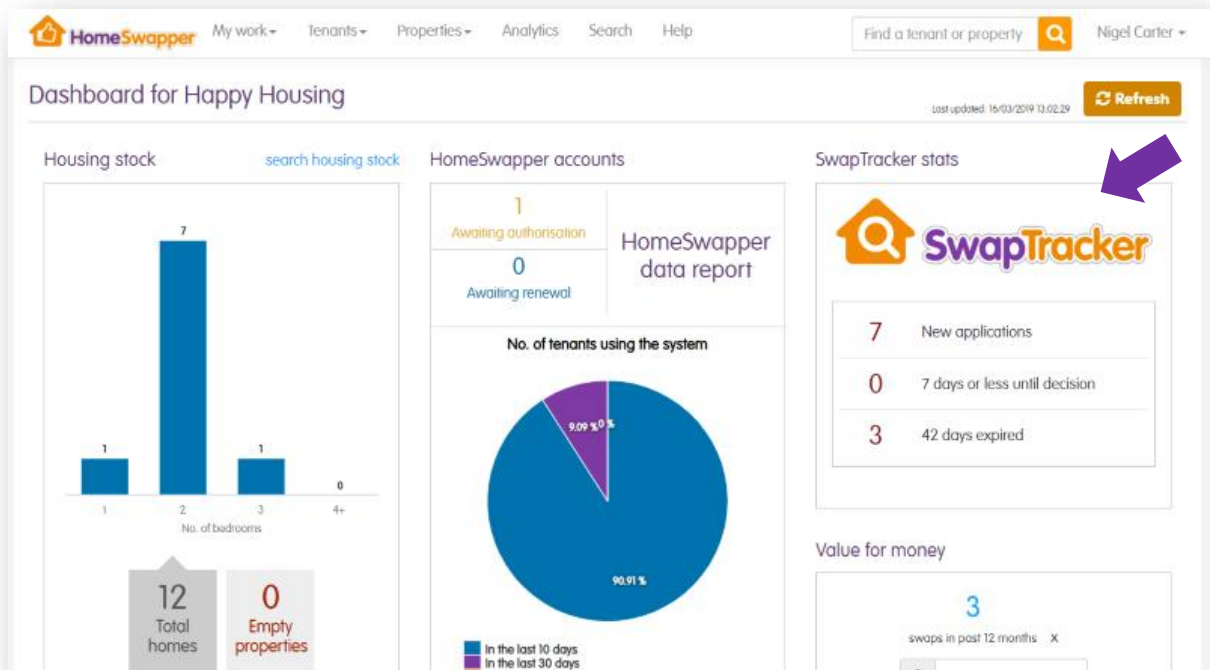


The screenshot shows the Housing Hub dashboard after login. The header includes the 'housinghub' logo and a 'Log out' link. Below the header, it says 'Hi Nigel, welcome to the Housing Hub'. The main area displays several tool panels. A purple arrow points to the 'SwapTracker' panel in the 'Mutual exchange' section. Other panels include 'HomeSwapper', 'housingjigsaw', 'streetwise', and a large 'TAIM' (Tenancy and Income Management) section with sub-tools like 'SafeStart', 'InSight', 'AIMLogic', 'PayBack', and 'DataManager'. A footer contains the 'housingpartners' logo, copyright information, a language selector, and a Google Translate notice.

HomeSwapper

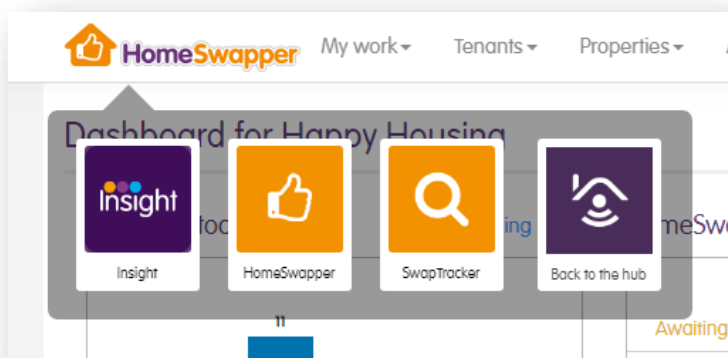
Your landlord dashboard in **HomeSwapper** will also have a “SwapTracker” panel giving you key stats about any MX applications that require your attention.

Clicking on any of these will take you directly to SwapTracker.

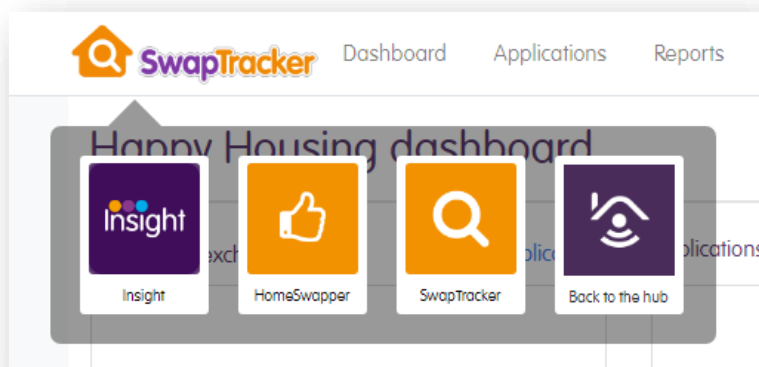


Moving between HomeSwapper and SwapTracker quickly

When in HomeSwapper, clicking on the logo will show a menu of tools you have subscriptions for. Click on any of these to go straight there.



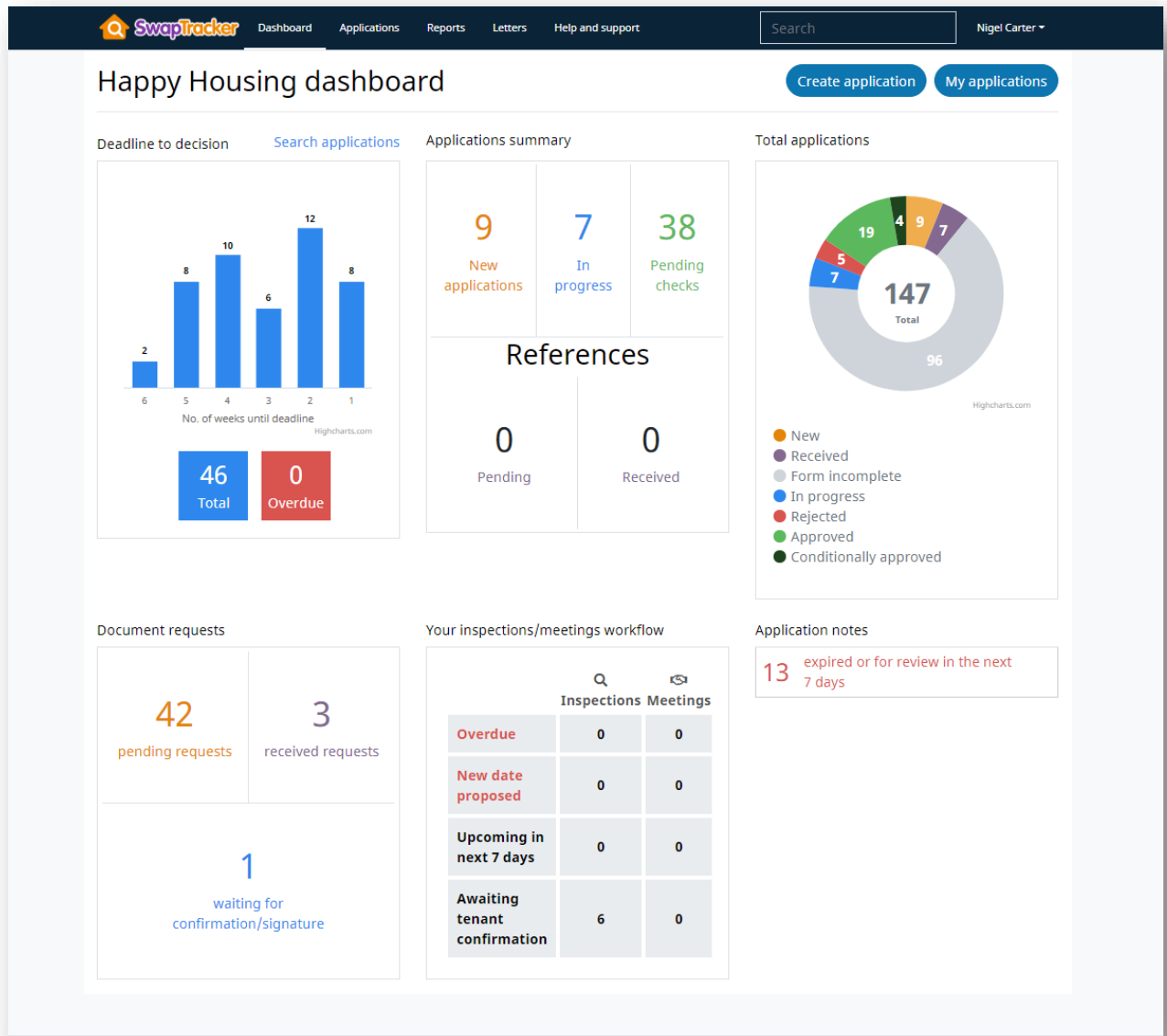
When in SwapTracker, clicking on the logo will also show a similar menu. Click on any of these to go straight to that tool, e.g. if you need to get back to HomeSwapper.



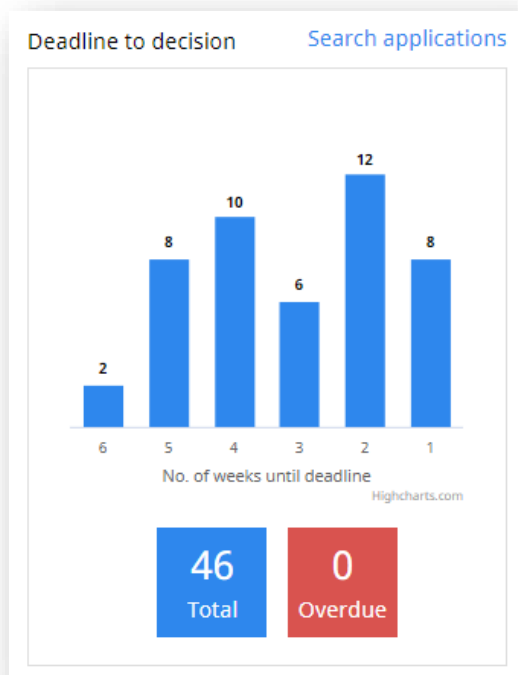
Clicking the logo again, hides these menus.

YOUR SWAPTRACKER DASHBOARD

The SwapTracker dashboard for your organisation shows all the key information regarding applications, inspections, checks, etc. as well as any actions requiring your attention.



Deadline to Decision



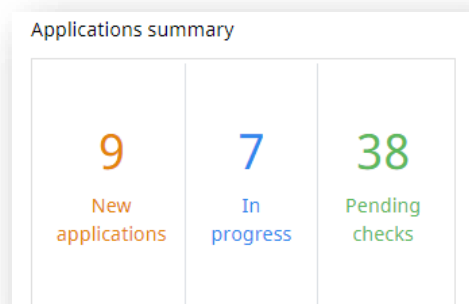
The “Deadline to decision” chart shows how many applications you have in progress.

These are broken down by the number of weeks remaining before the 42-day deadline for a decision expires.

Clicking on any of the totals will take you to the list of applications they refer to.

Applications Summary

The “Applications summary” boxes show:



- New applications – the number of applications submitted by the tenant and have a “new” status.

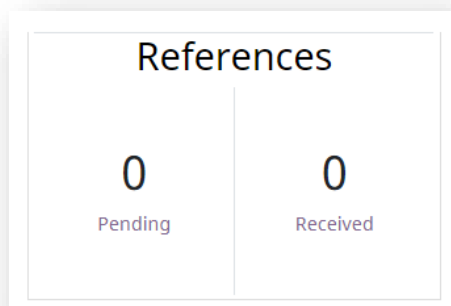
- In progress – the number of applications with a status of “in progress”.

- Pending checks – any outstanding tenant checks which have not been completed.

Clicking on any of the totals will take you to the list of applications or checks they refer to.

Reference Requests

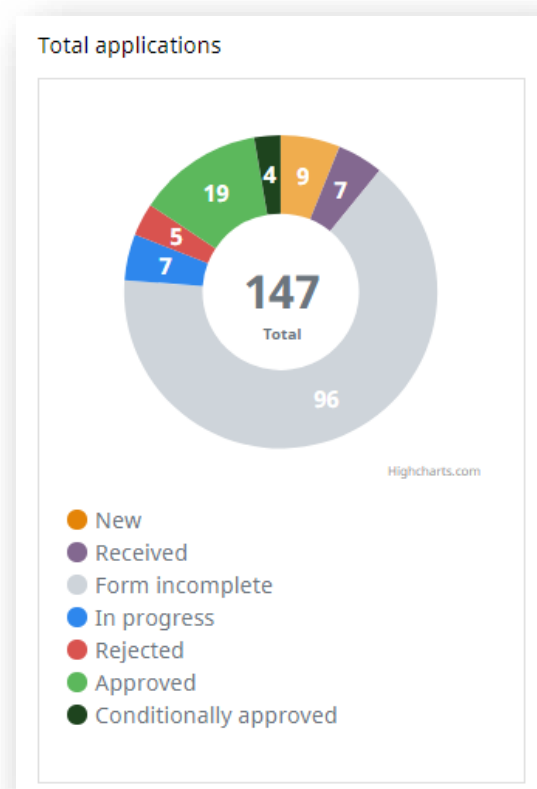
The “Applications summary” box also includes workflow for your reference requests:



- Pending – the number of reference requests you have outstanding, i.e. the request has been sent to the landlord, but the completed reference has not yet been received.
- Received – the number of references that have been received and are ready for you to review.

Clicking on any of the totals will take you to a list of the reference requests they refer to.

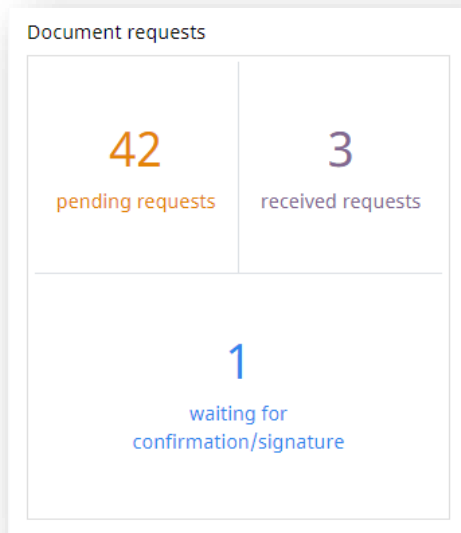
Total Applications



The “Total applications” chart shows the number of MX applications you have at each stage of the process.

Clicking any of the sections of the “doughnut” will take you to the list of all your applications with that status.

Documents





The “Document requests” boxes show:

- Pending requests – all document requests you have sent to tenants that have not yet been supplied.
- Received requests – all documents supplied by tenants that you have not yet checked and confirmed.
- Waiting for confirmation/signature – all documents you have shared with tenants where you are waiting for them to confirm receipt. See [Requesting confirmation / signature from the tenant](#)

Inspections/Meetings workflow

Your inspections/meetings workflow

	 Inspections	 Meetings
Overdue	0	0
New date proposed	0	0
Upcoming in next 7 days	0	0
Awaiting tenant confirmation	6	0

This workflow shows any inspections or meetings that are:

- Overdue – the scheduled date has passed, and they have not been set to “Complete”.
- New date proposed – the tenant has suggested an alternative date/time. Don’t worry, this is an optional setting!
- Upcoming – the scheduled date is within the next 7 days.
- Awaiting tenant confirmation – the tenant has not yet confirmed the date/time.

Application Notes

Application notes

13 expired or for review in the next
7 days

If you add a “review date” against any application notes, they will appear in this workflow when the review date is within the next 7 days (or has passed).

APPLICATIONS

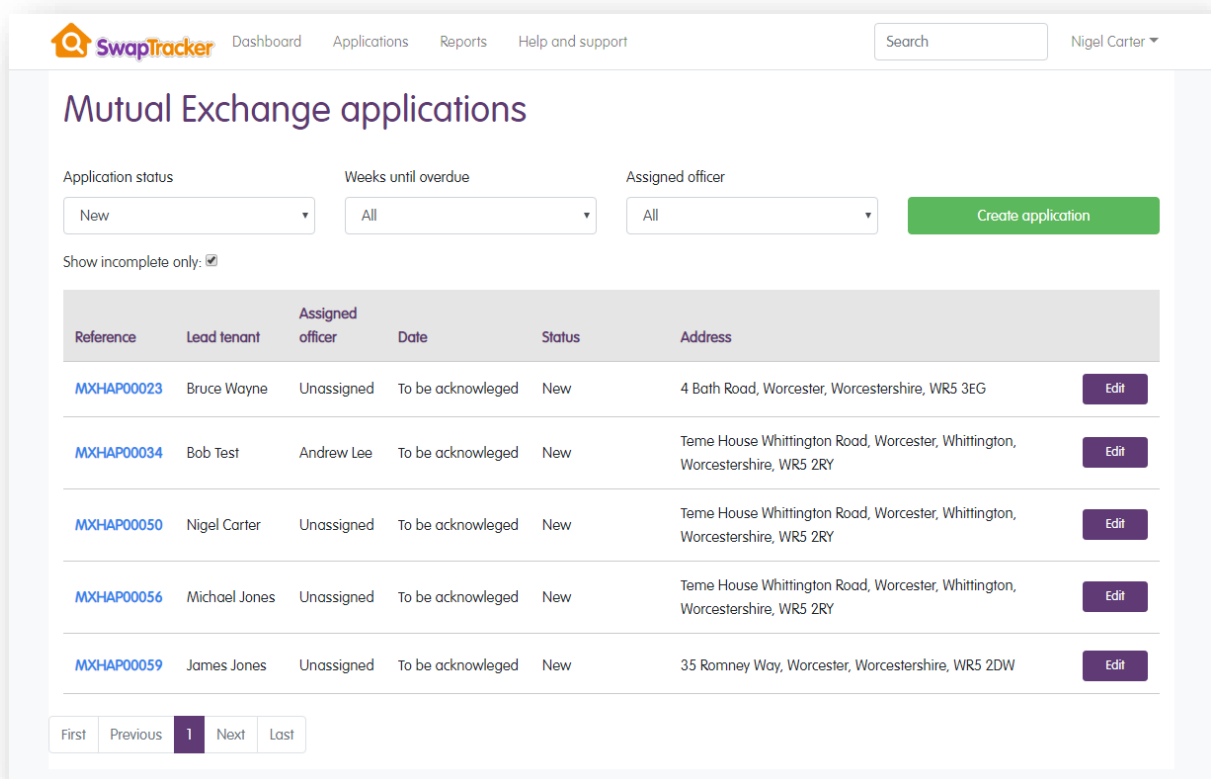
What do the Statuses mean?

A SwapTracker application can have one of the following statuses:

Form Incomplete	<p>The application form has not been completed and submitted to you.</p> <p>When the tenant completes and submits the form the status will change to “New”.</p>
New	<p>The application form has been submitted by the tenant.</p> <p>You should now review the form and check you are happy with it, e.g. have they entered all the information you need?</p> <p>If everything is okay, you should change the status to “Received”. (See Dealing with “new” applications)</p> <p>If there are any issues with their form, you can set it back to “Form Incomplete” for the tenant to make the necessary changes and resubmit. (See Problem with an Applicant’s Form?)</p>
Received	<p>You have indicated that you have received the form. (See Dealing with “new” applications)</p> <p>Note: the 42-day process will not start until you set the application to “In Progress”.</p>
In Progress	<p>The mutual exchange application is now in progress:</p> <ul style="list-style-type: none"> You have received all forms related to the application The 42-days for a decision have now commenced <p>(See Setting the Application to “In Progress”)</p>
Approved	<p>The application has been approved. (See Approving an application)</p>
Conditionally Approved	<p>The application has been conditionally approved and you will be prompted to provide details of the conditions involved. (See Conditionally Approving an application)</p>
Rejected	<p>The application has been refused and you will be prompted to provide details of the why. (See Refusing an application)</p>
Cancelled	<p>The application has been cancelled by either the tenant or your organisation.</p>

Applications List

The “*Mutual Exchange applications*” list shows the applications for your organisation.



The screenshot shows the SwapTracker interface for the 'Mutual Exchange applications' page. At the top, there's a navigation bar with 'Dashboard', 'Applications', 'Reports', and 'Help and support'. A search bar and the user name 'Nigel Carter' are on the right. The main heading is 'Mutual Exchange applications'. Below this, there are three filters: 'Application status' (set to 'New'), 'Weeks until overdue' (set to 'All'), and 'Assigned officer' (set to 'All'). A green 'Create application' button is on the right. A checkbox 'Show incomplete only' is checked. The main content is a table with columns: Reference, Lead tenant, Assigned officer, Date, Status, and Address. There are five rows of applications, each with an 'Edit' button. At the bottom, there's a pagination bar showing 'First', 'Previous', '1', 'Next', and 'Last'.

Reference	Lead tenant	Assigned officer	Date	Status	Address	
MXHAP00023	Bruce Wayne	Unassigned	To be acknowledged	New	4 Bath Road, Worcester, Worcestershire, WR5 3EG	Edit
MXHAP00034	Bob Test	Andrew Lee	To be acknowledged	New	Teme House Whittington Road, Worcester, Whittington, Worcestershire, WR5 2RY	Edit
MXHAP00050	Nigel Carter	Unassigned	To be acknowledged	New	Teme House Whittington Road, Worcester, Whittington, Worcestershire, WR5 2RY	Edit
MXHAP00056	Michael Jones	Unassigned	To be acknowledged	New	Teme House Whittington Road, Worcester, Whittington, Worcestershire, WR5 2RY	Edit
MXHAP00059	James Jones	Unassigned	To be acknowledged	New	35 Romney Way, Worcester, Worcestershire, WR5 2DW	Edit

This can be filtered by:

- The status of the application
- The number of weeks until the decision is required (if applicable)
- The assigned officer. See [Assigning Applications](#)
- Show incomplete only – if this is ticked (it is ticked by default) the list of applications will **not** include those that have been set to “complete”. See [Setting an Application to Complete](#)

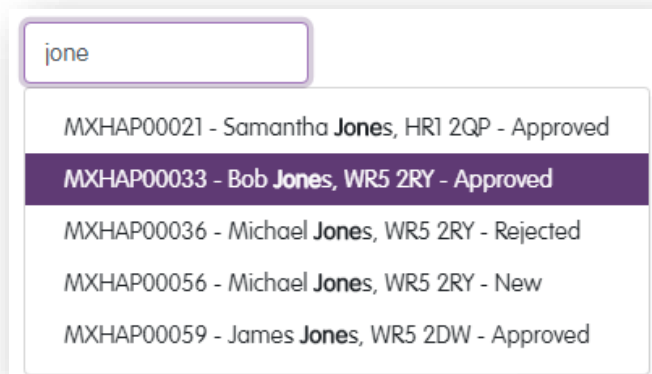
Clicking “Edit”, or the SwapTracker Reference number, will take you to the Application Summary page.

Searching for Applications

In the SwapTracker header bar there is a search box which can be used to find specific applications.

As you type, a list of matching applications is shown.

Clicking on any of these will take you to their “*Application Summary*” page.



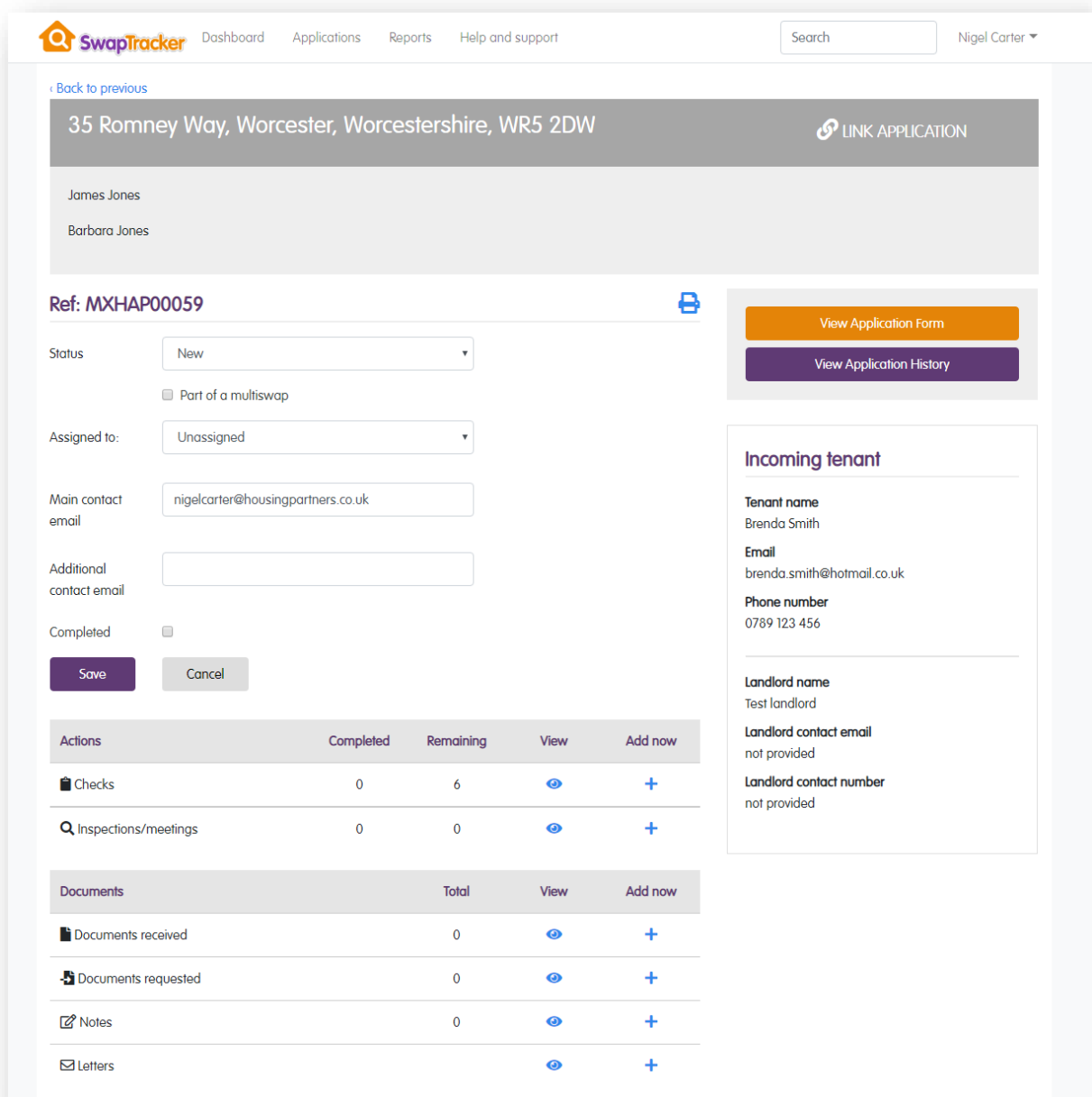
The screenshot shows a search box with the text 'jone' entered. Below the search box is a dropdown list of application results. The second result, 'MXHAP00033 - Bob Jones, WR5 2RY - Approved', is highlighted in a dark purple background.

Application ID	Tenant Name	Address	Status
MXHAP00021	Samantha Jones	HR1 2QP	Approved
MXHAP00033	Bob Jones	WR5 2RY	Approved
MXHAP00036	Michael Jones	WR5 2RY	Rejected
MXHAP00056	Michael Jones	WR5 2RY	New
MXHAP00059	James Jones	WR5 2DW	Approved

The search checks for tenant name, any part of their address and the SwapTracker reference number.

Application Summary

The “*Application Summary*” page provides you with a complete overview of an application.



The screenshot shows the SwapTracker application summary page for a specific application. The page includes a navigation bar with links to Dashboard, Applications, Reports, and Help and support. A search bar and a user profile (Nigel Carter) are also present. The main content area displays the application details, including the address (35 Romney Way, Worcester, Worcestershire, WR5 2DW), the applicant's name (James Jones), and the assigned agent (Barbara Jones). A reference number (Ref: MXHAP00059) is shown. The status is set to 'New', and there is an option to 'Part of a multswap'. The assigned agent is 'Unassigned'. The main contact email is 'nigelcarter@housingpartners.co.uk'. There is a section for 'Incoming tenant' with details: Tenant name (Brenda Smith), Email (brenda.smith@hotmail.co.uk), and Phone number (0789 123 456). The 'Landlord name' is 'Test landlord', and the 'Landlord contact email' and 'Landlord contact number' are 'not provided'. At the bottom, there are two tables: 'Actions' and 'Documents'. The 'Actions' table shows 'Checks' (0 completed, 6 remaining) and 'Inspections/meetings' (0 completed, 0 remaining). The 'Documents' table shows 'Documents received' (0), 'Documents requested' (0), 'Notes' (0), and 'Letters' (0).

35 Romney Way, Worcester, Worcestershire, WR5 2DW

James Jones

Barbara Jones

Ref: MXHAP00059

Status: New

☐ Part of a multswap

Assigned to: Unassigned

Main contact email: nigelcarter@housingpartners.co.uk

Additional contact email:

Completed: ☐

Save Cancel

View Application Form

View Application History

Incoming tenant

Tenant name
Brenda Smith

Email
brenda.smith@hotmail.co.uk

Phone number
0789 123 456

Landlord name
Test landlord

Landlord contact email
not provided

Landlord contact number
not provided

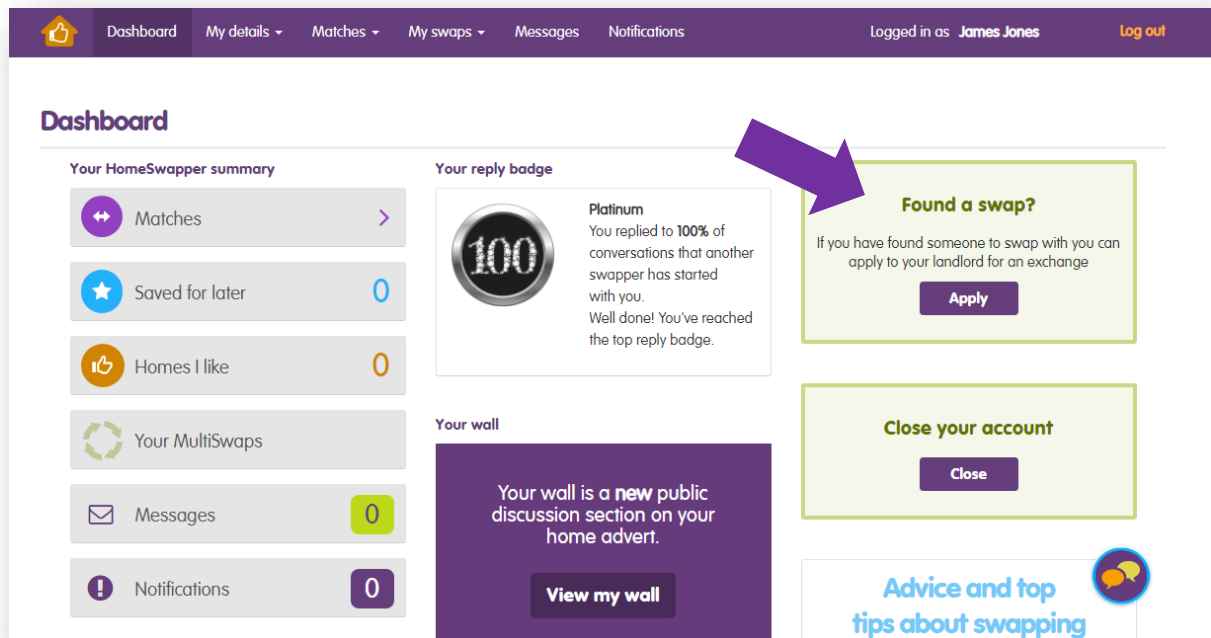
Actions	Completed	Remaining	View	Add now
Checks	0	6	View	+
Inspections/meetings	0	0	View	+

Documents	Total	View	Add now
Documents received	0	View	+
Documents requested	0	View	+
Notes	0	View	+
Letters		View	+

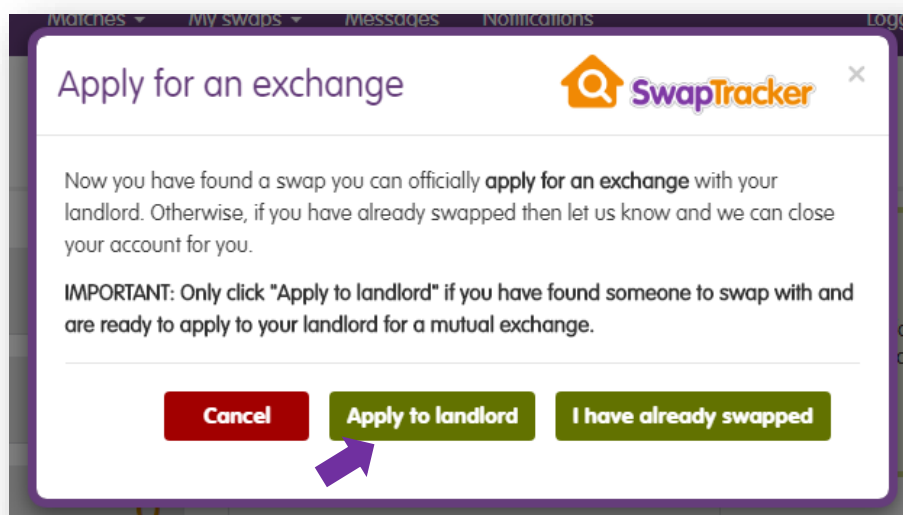
This is the main page for performing all actions against an application, e.g. changing the status, adding/editing checks, scheduling meetings, etc.

HOW TENANTS APPLY (USING HOMESWAPPER)

Your tenants can apply directly from HomeSwapper if they have a HomeSwapper account. On their dashboard there is a “*Found a swap?*” button they can use to apply:



Clicking the “*Apply to landlord*” button will start the SwapTracker application process for the tenant and they are taken to the SwapTracker application form.

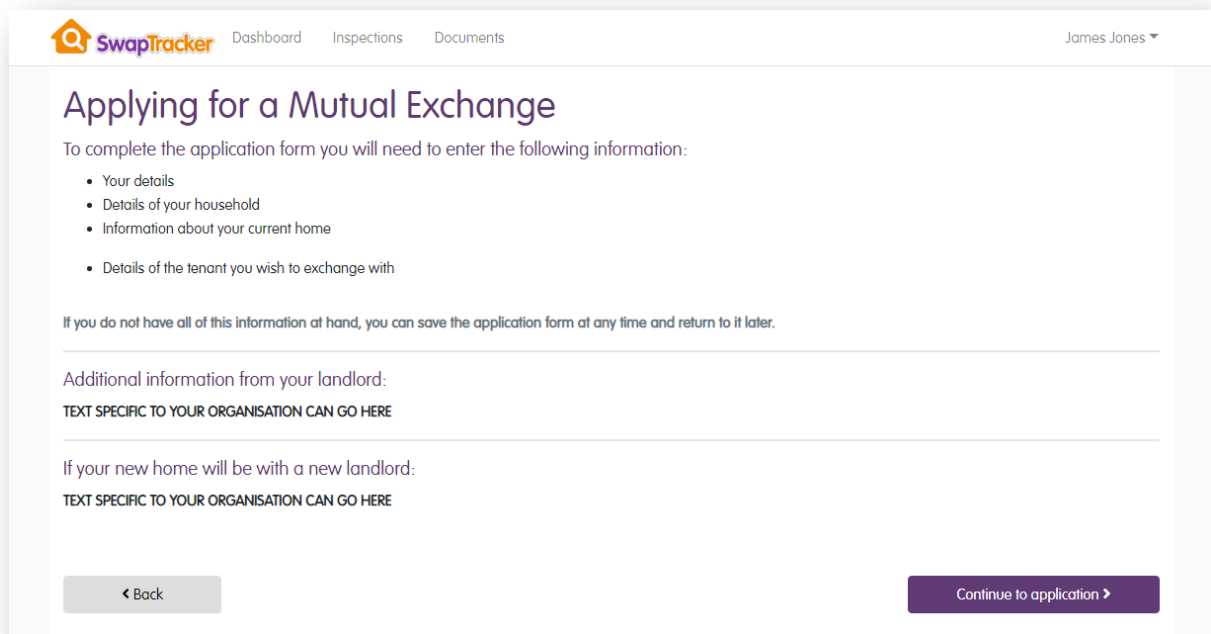


The SwapTracker application form

Introduction

The first page of the form gives the tenant details of the information they will need to provide.

However, they can save the form and return to it later at any time. It does not have to be completed all in one go.



The screenshot shows the SwapTracker application form for a mutual exchange. The header includes the SwapTracker logo, navigation links for Dashboard, Inspections, and Documents, and a user profile for James Jones. The main heading is 'Applying for a Mutual Exchange'. Below this, a message states: 'To complete the application form you will need to enter the following information:'. A bulleted list follows: 'Your details', 'Details of your household', 'Information about your current home', and 'Details of the tenant you wish to exchange with'. A note indicates that users can save the form and return later if they don't have all the information. There are two text input areas for 'Additional information from your landlord', each with a placeholder 'TEXT SPECIFIC TO YOUR ORGANISATION CAN GO HERE'. At the bottom, there is a 'Back' button and a 'Continue to application' button.



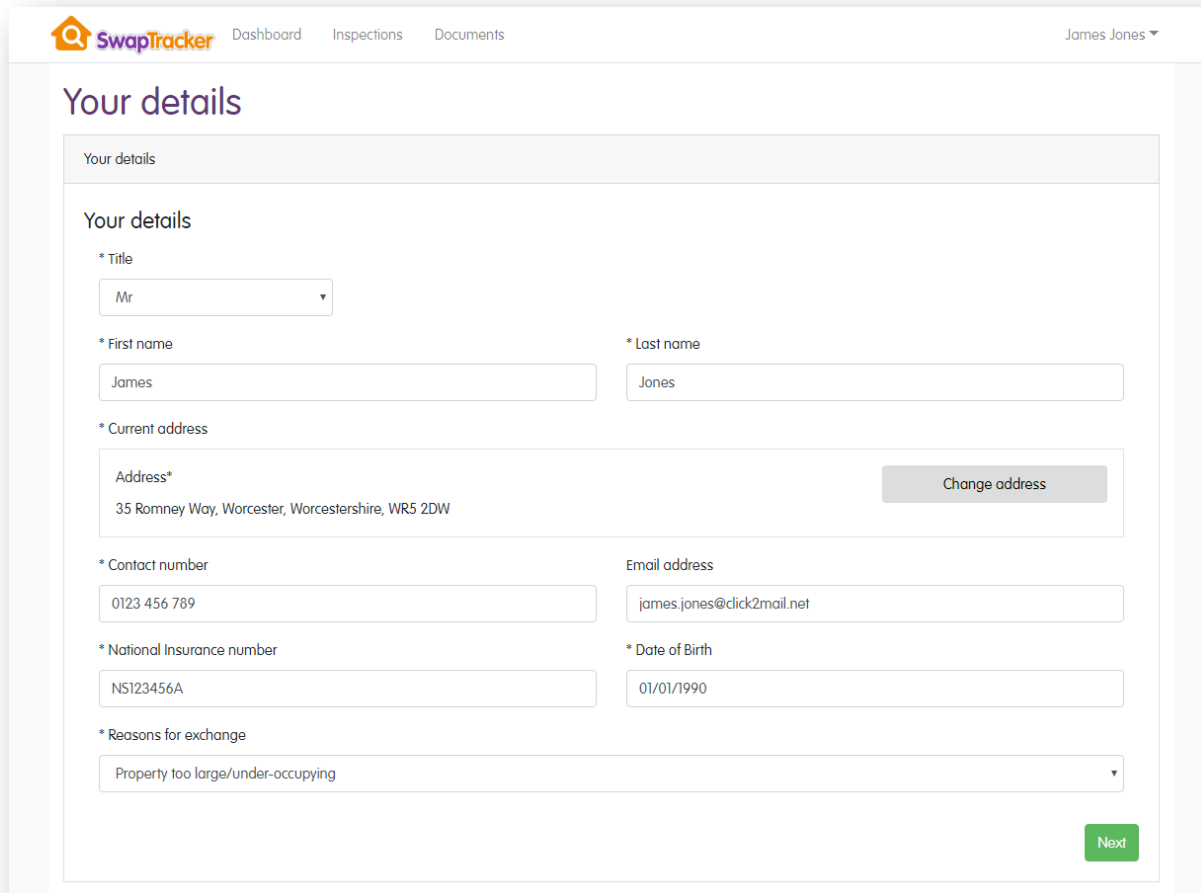
At the bottom of the page are the “*Additional information from your landlord*” and “*If your new home will be with a new landlord*” sections. You can use these to inform the applying tenant of anything specific to your organisation, e.g. Do you have any local connection rules?

If you would like to supply some text for this, please contact Housing Partners and we can configure this for you.

Note: if no text is specified these sections are not shown.

1. Your details

The tenant must enter details of themselves as the main applicant. This includes their reason for wanting to exchange.



The screenshot shows the 'Your details' form in the SwapTracker application. The form is titled 'Your details' and is located under the 'Dashboard' tab. The form contains several fields for personal information, including title, first name, last name, current address, contact number, email address, national insurance number, date of birth, and reasons for exchange. A 'Next' button is located at the bottom right of the form.

SwapTracker Dashboard Inspections Documents James Jones ▾

Your details

Your details

* Title
Mr ▾

* First name
James

* Last name
Jones

* Current address
Address*
35 Romney Way, Worcester, Worcestershire, WR5 2DW
Change address

* Contact number
0123 456 789

Email address
james.jones@click2mail.net

* National Insurance number
NS123456A

* Date of Birth
01/01/1990

* Reasons for exchange
Property too large/under-occupying ▾

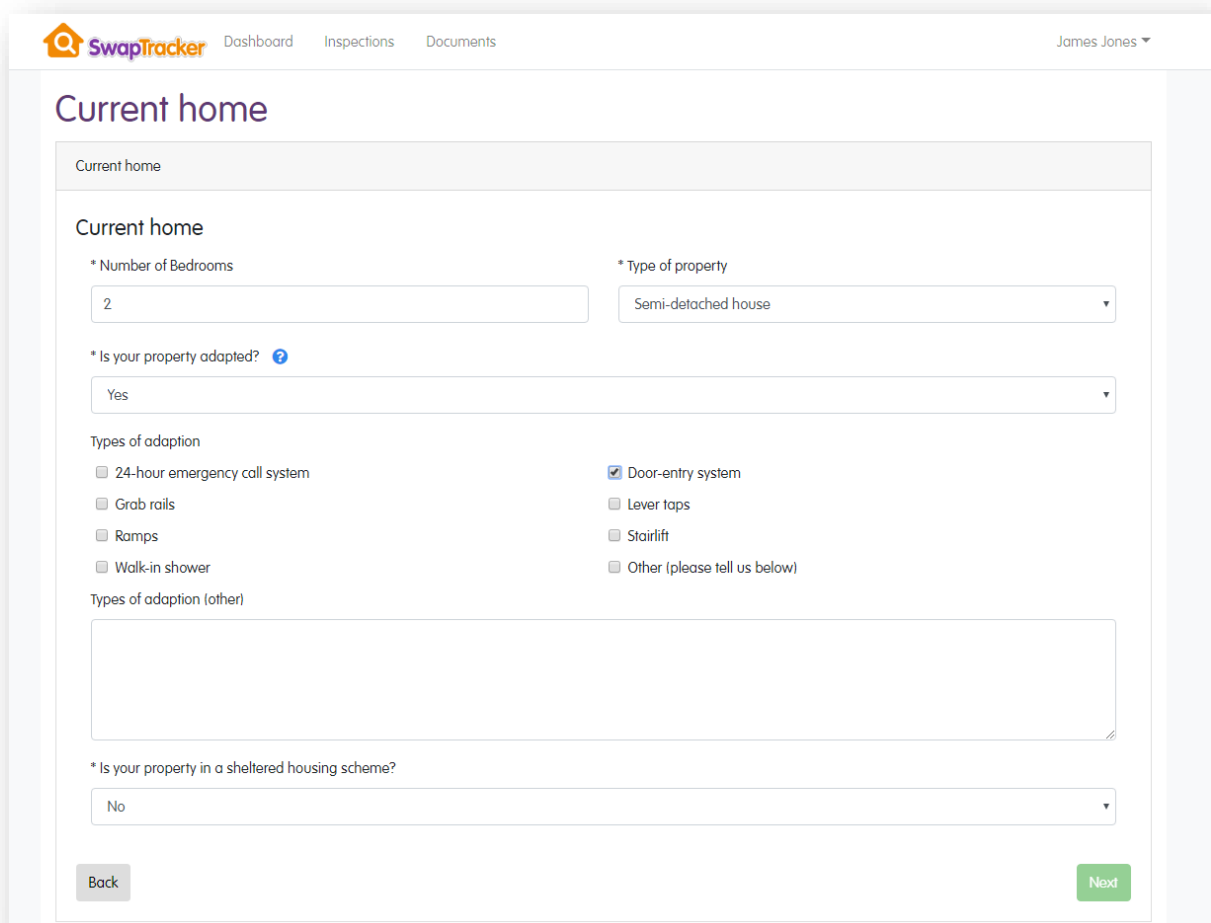
Next

If the tenant is applying from HomeSwapper, some of this page is pre-populated as we already have this information:

- Tenant name
- Address
- Contact number
- Email address

2. Current home

The tenant must enter details of where they are currently living.



Current home

Current home

* Number of Bedrooms
2

* Type of property
Semi-detached house

* Is your property adapted? [?](#)
Yes

Types of adaption

☐ 24-hour emergency call system ☒ Door-entry system

☐ Grab rails ☐ Lever taps

☐ Ramps ☐ Stairlift

☐ Walk-in shower ☐ Other (please tell us below)

Types of adaption (other)

* Is your property in a sheltered housing scheme?
No

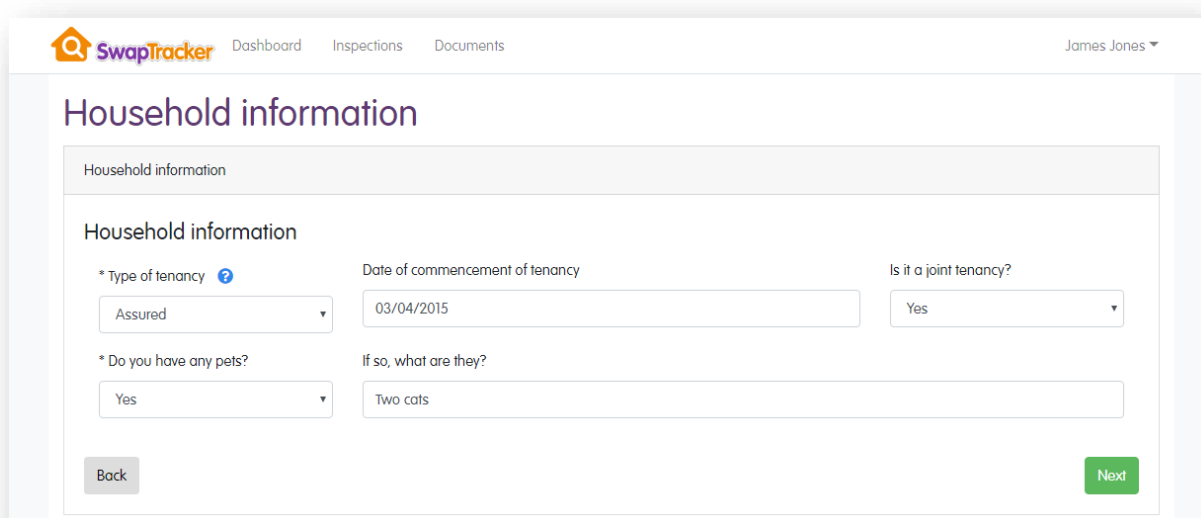
Back Next

If the tenant is applying from HomeSwapper, some of this page is pre-populated as we already have this information:

- Number of bedrooms
- Type of property

3. Household information

The tenant must enter details of their current tenancy and whether they have pets.

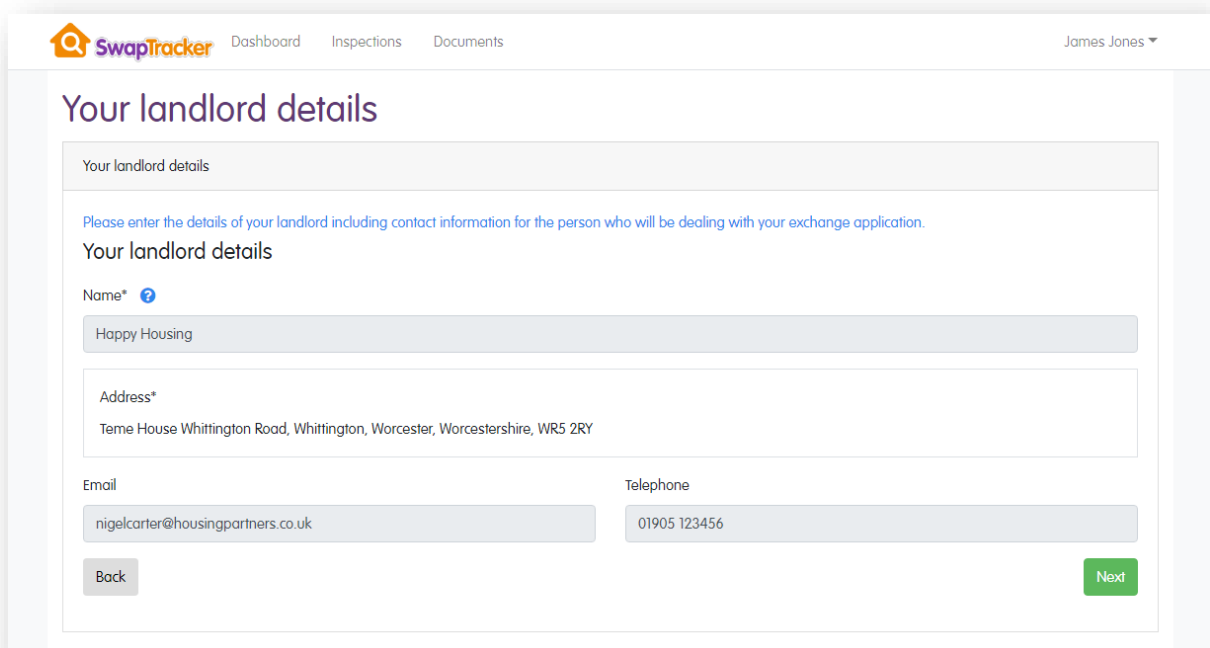


The examples in this User Guide show the standard SwapTracker application form. If there are any additional questions or sections your organisation requires, please contact Housing Partners and we can configure these for you.

Please note: we may not be able to replicate your own form exactly but can configure your version of the SwapTracker form to be as close as possible.

4. Your landlord details

The tenant must enter details of their landlord.



The screenshot shows the 'Your landlord details' page in the SwapTracker application. The page has a header with the SwapTracker logo, navigation links for 'Dashboard', 'Inspections', and 'Documents', and a user profile 'James Jones'. The main heading is 'Your landlord details'. Below this is a sub-heading 'Your landlord details' and a blue instruction: 'Please enter the details of your landlord including contact information for the person who will be dealing with your exchange application.' The form contains several input fields: 'Name*' with a help icon, 'Address*', 'Email', and 'Telephone'. The 'Name' field is pre-populated with 'Happy Housing'. The 'Address' field is pre-populated with 'Teme House Whittington Road, Whittington, Worcester, Worcestershire, WR5 2RY'. The 'Email' field is pre-populated with 'nigelcarter@housingpartners.co.uk'. The 'Telephone' field is pre-populated with '01905 123456'. At the bottom left is a 'Back' button and at the bottom right is a green 'Next' button.

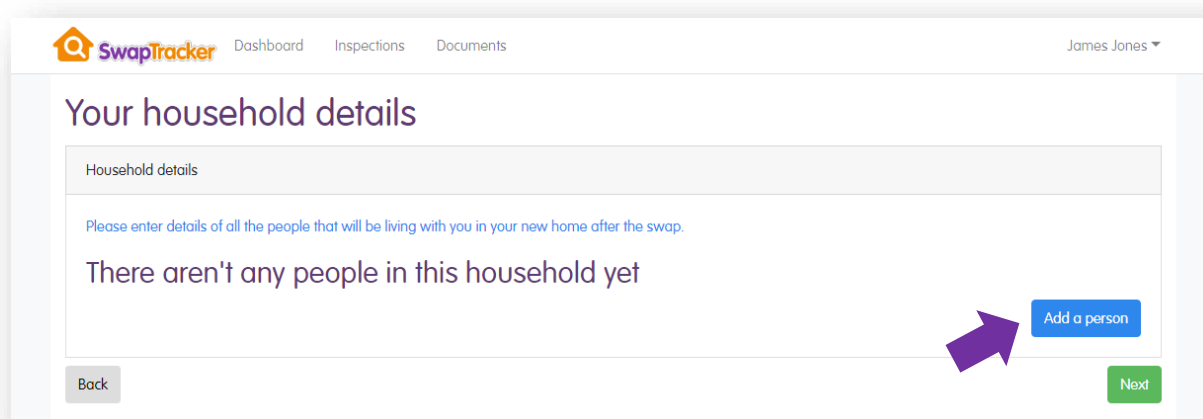
If they are applying from HomeSwapper we already know who their landlord is and so this page is pre-populated and they can simply click “Next”.

Otherwise the tenant will need to select their landlord from the list provided.

If we have MX contact details for this organisation, the address, email and telephone are pre-populated from our database.

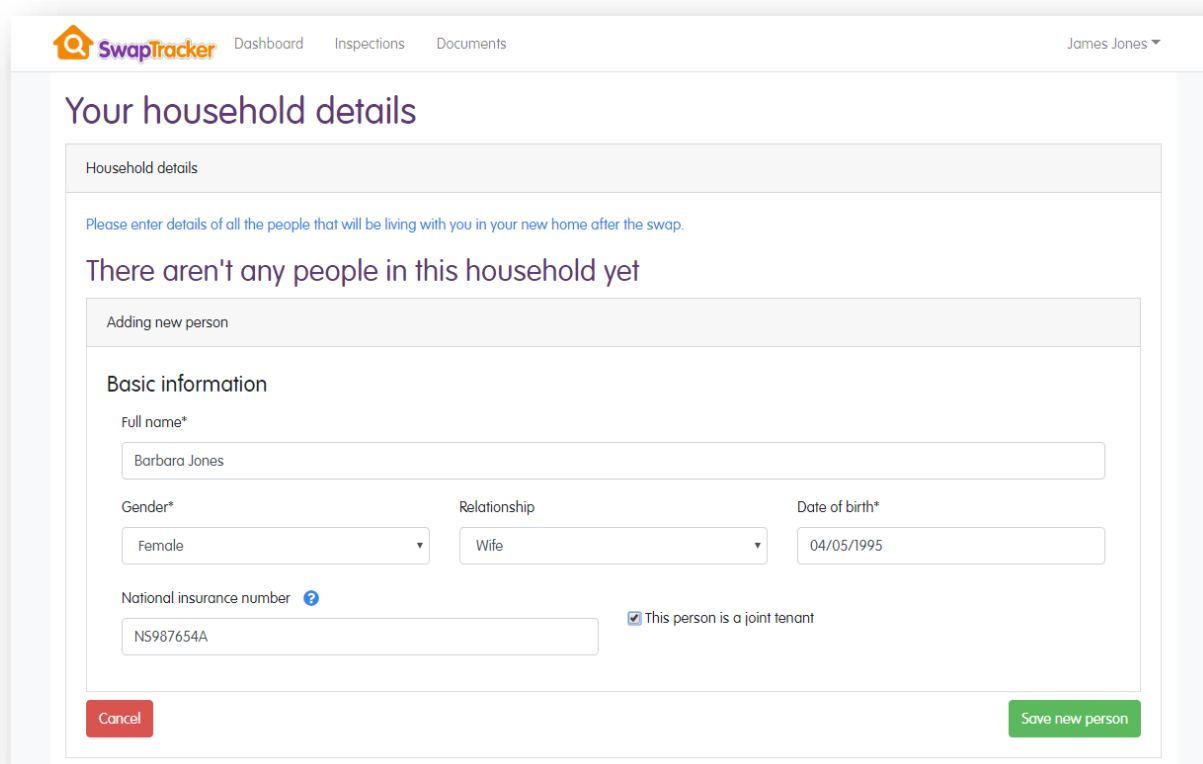
5. Your household details

The tenant must provide a list of everyone who will be living with them when they move.



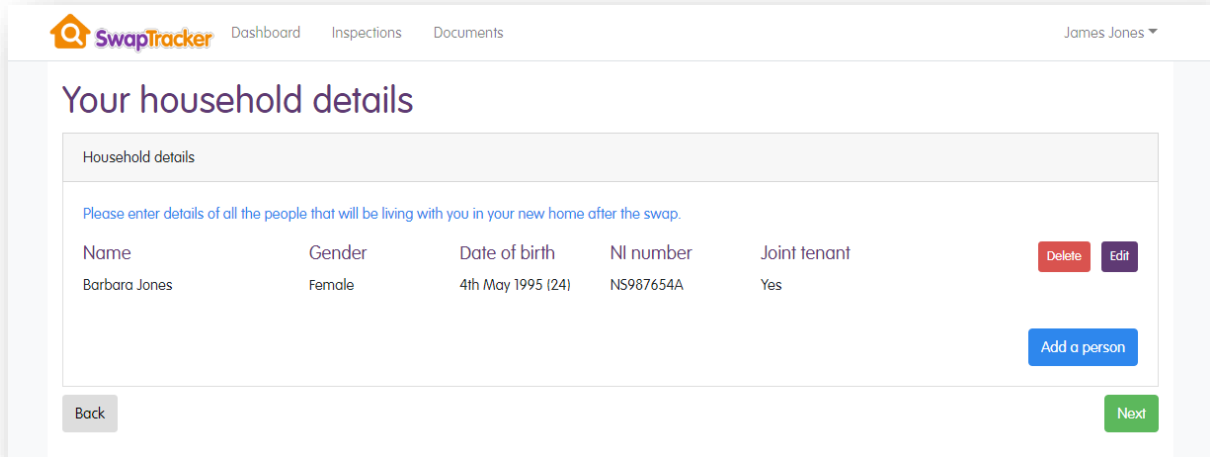
Clicking “Add a person” will take them to a form where they can add details of a household member.

This includes identifying if they are the joint tenant.



Clicking “Save new person” saves the household member’s details and a list of all saved people is shown.

From here, the tenant can edit or delete an existing household member or add additional people.



SwapTracker Dashboard Inspections Documents James Jones ▾

Your household details

Household details

Please enter details of all the people that will be living with you in your new home after the swap.

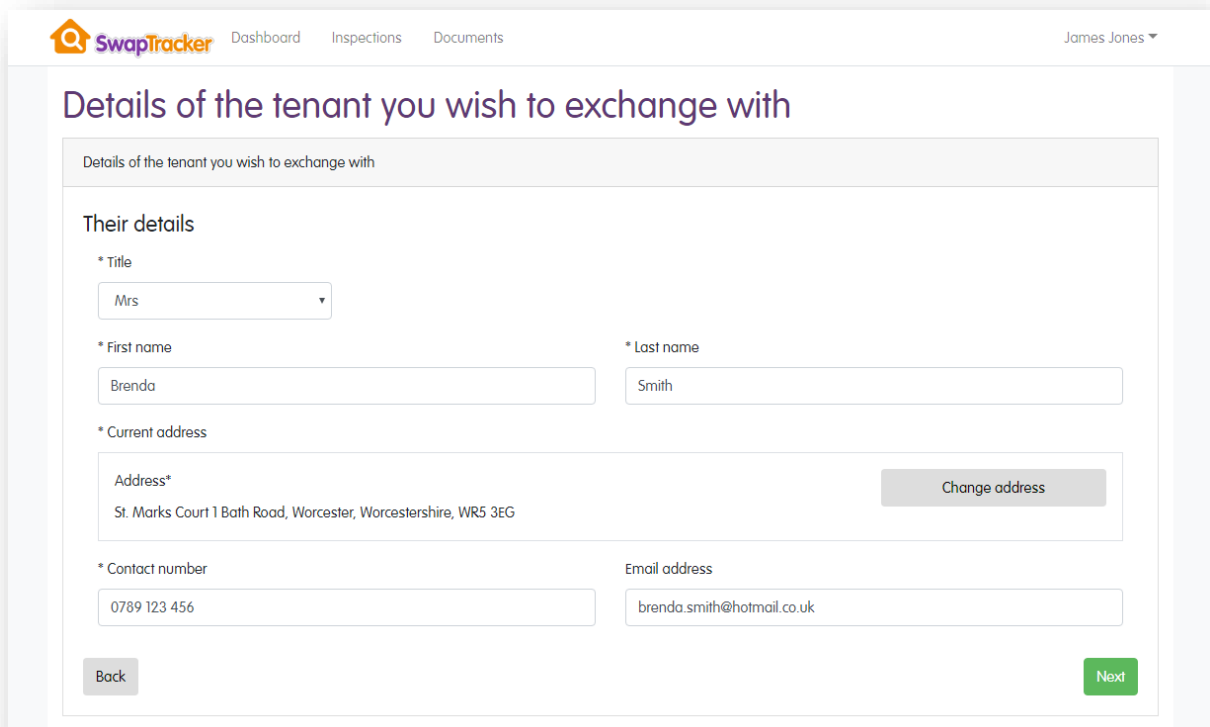
Name	Gender	Date of birth	NI number	Joint tenant	
Barbara Jones	Female	4th May 1995 (24)	NS987654A	Yes	Delete Edit

[Add a person](#)

[Back](#)
[Next](#)

6. Details of the tenant you wish to exchange with

The second half of the form relates to the person the tenant wants to swap with.



SwapTracker Dashboard Inspections Documents James Jones ▾

Details of the tenant you wish to exchange with

Details of the tenant you wish to exchange with

Their details

* Title

* First name

* Last name

* Current address

[Change address](#)

* Contact number

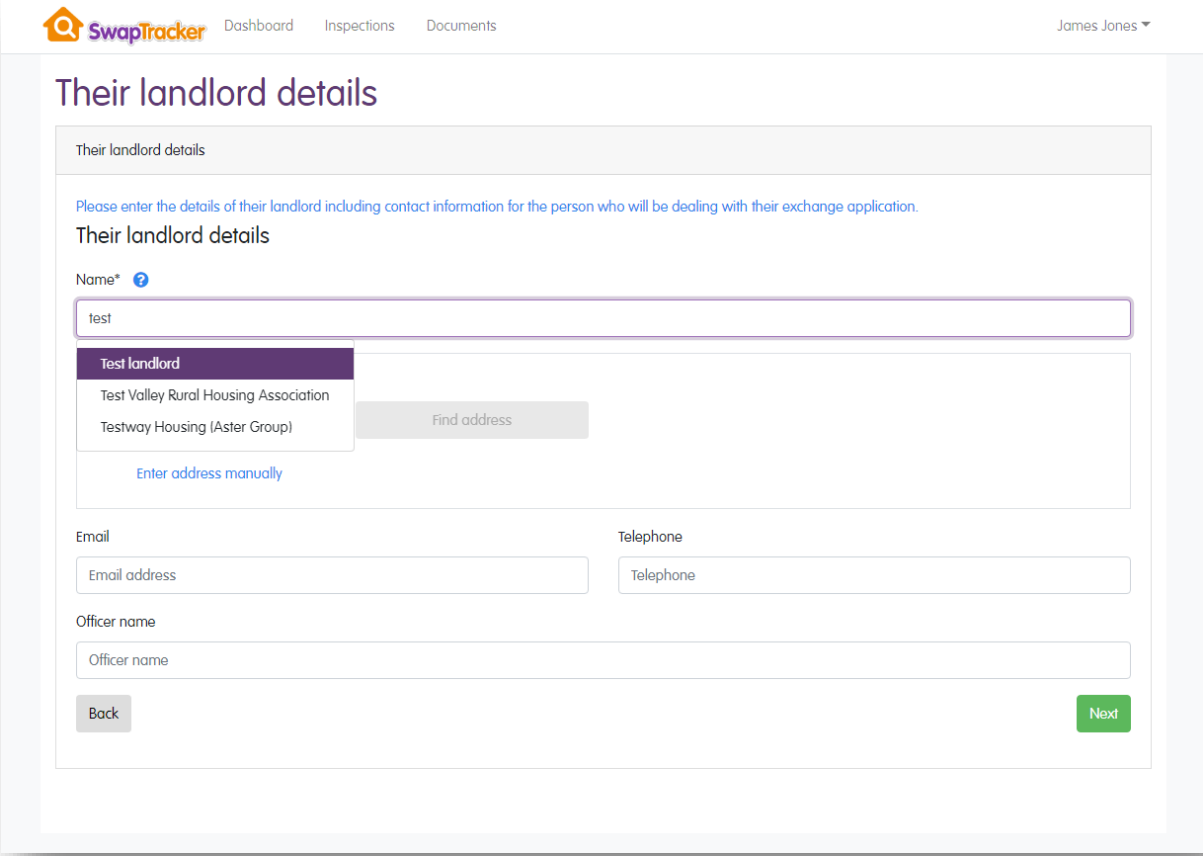
Email address

[Back](#)
[Next](#)

Details of a joint tenant can also be entered on this page (if applicable).

7. Their landlord details

The tenant selects the landlord of the person they want to swap with.



SwapTracker Dashboard Inspections Documents James Jones ▾

Their landlord details

Their landlord details

Please enter the details of their landlord including contact information for the person who will be dealing with their exchange application.

Their landlord details

Name* ⓘ

test

Test landlord

Test Valley Rural Housing Association

Testway Housing (Aster Group)

Find address

[Enter address manually](#)

Email

Email address

Telephone

Telephone

Officer name

Officer name

Back Next

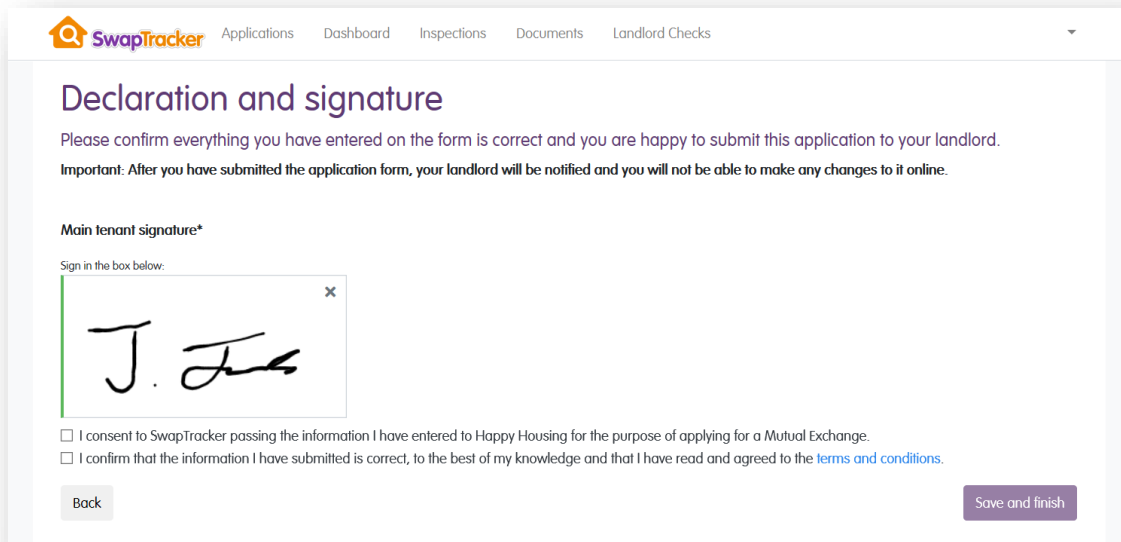
If we have MX contact details for this organisation, the address, email and telephone are pre-populated from our database.

8. Declaration and signature

On the final page of the form the tenant must:

- Sign the signature box
- Tick the box to consent to passing their information to your organisation
- Tick the box to agree to the *terms and conditions* and *privacy policy* (if applicable)

The application form cannot be submitted if they have not done all the above.



If there is a joint tenant, that person will also be required to tick the confirmation boxes and provide a signature.

When they click “*Save and finish*” the application is set to “New” and the form is locked, i.e. they are unable to amend anything they have submitted unless you allow them to do so later (see [Problem with an Applicant's Form?](#))

If you are completing the form on behalf of a tenant, you do not need to sign the declaration page.



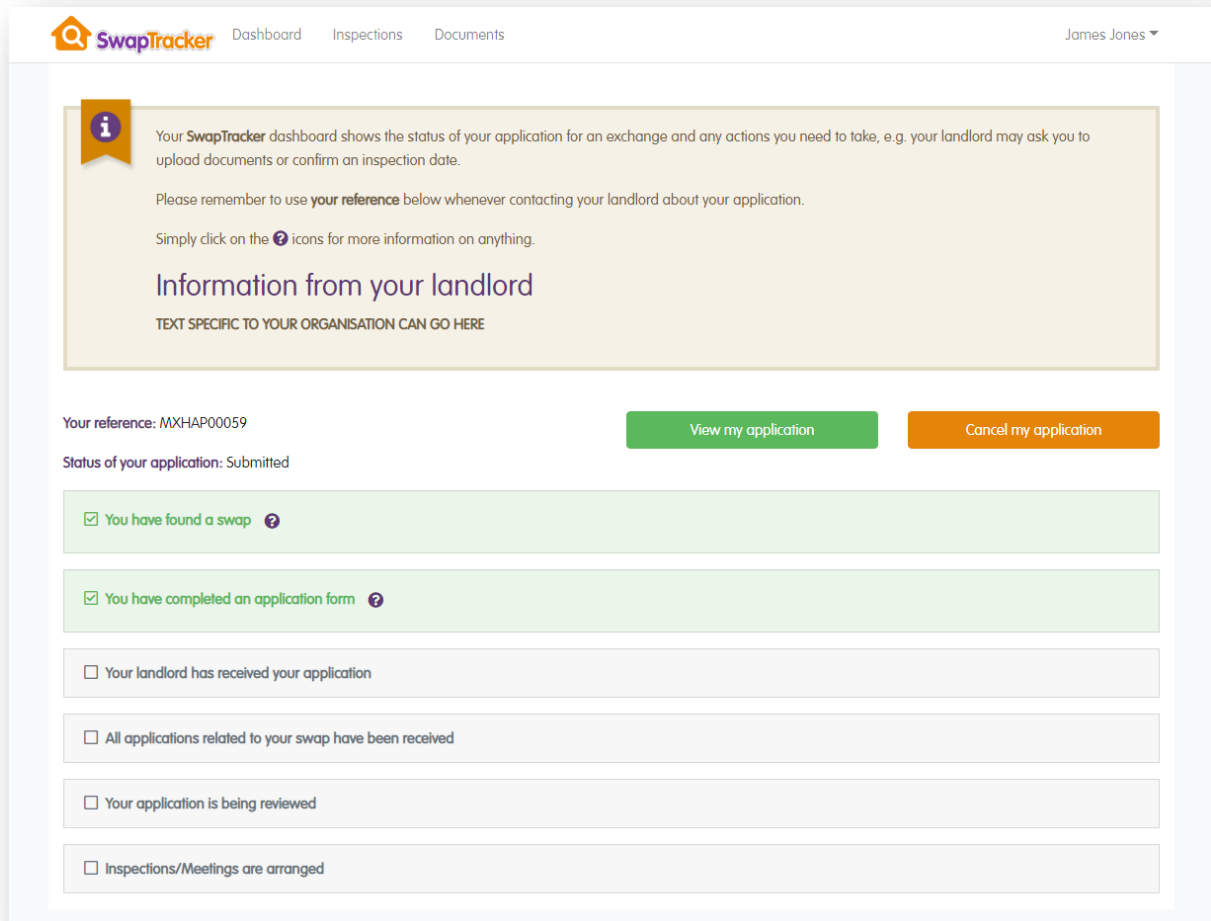
The “*terms and conditions*” and “*privacy policy*” the tenant must agree to can be your own documents.

If you want to use your own, please contact Housing Partners and we can configure these for you.

The tenant's SwapTracker dashboard

On submitting the form, the tenant is taken to their SwapTracker dashboard.

From here they can see the progress of their application and any actions they need to take, e.g. documents to upload or appointments to confirm.



The screenshot shows the SwapTracker tenant dashboard. At the top, there's a navigation bar with 'Dashboard', 'Inspections', and 'Documents' tabs, and a user profile 'James Jones'. The main content area has a large orange box with an information icon and text explaining the dashboard's purpose and providing instructions on using the reference and help icons. Below this is a section titled 'Information from your landlord' with a placeholder for organization-specific text. Further down, the 'Your reference' is shown as 'MXHAP00059', followed by 'Status of your application: Submitted'. Two buttons, 'View my application' (green) and 'Cancel my application' (orange), are present. A list of application progress items follows, each with a checkbox and a question mark icon: 'You have found a swap' (checked), 'You have completed an application form' (checked), 'Your landlord has received your application' (unchecked), 'All applications related to your swap have been received' (unchecked), 'Your application is being reviewed' (unchecked), and 'Inspections/Meetings are arranged' (unchecked).



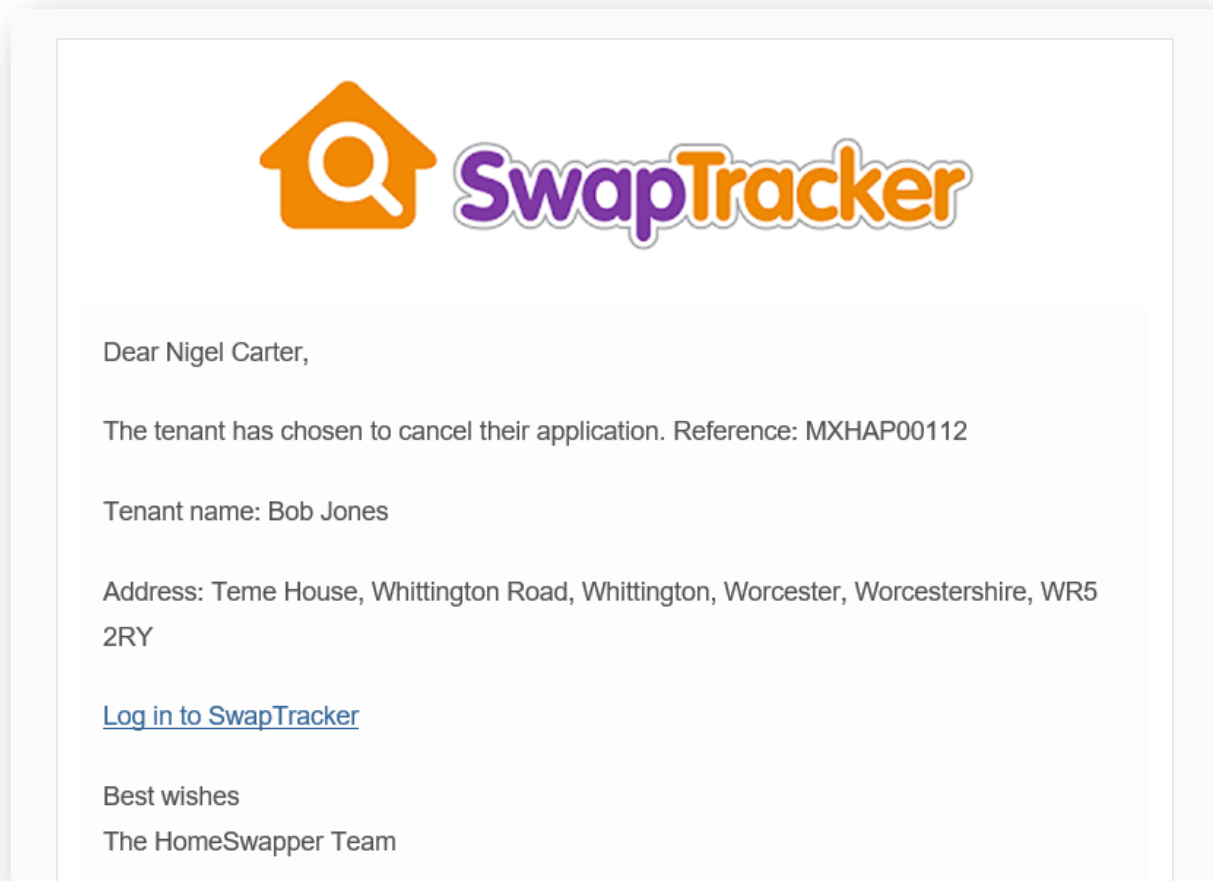
The “*Information from your landlord*” section can be used by you to communicate anything your organisation feels is important for tenants to be made aware of.

If you would like to provide some text for this, please contact Housing Partners and we can configure these for you. Otherwise nothing will be shown here.

Applications cancelled by the tenant

Tenants can cancel an application from their SwapTracker dashboard.

If this happens you will receive an email like the one below:



Important: you cannot access a tenant's application in SwapTracker if they choose to cancel it.

However, some information regarding the application is still viewable in the SwapTracker applications report that can be downloaded in the "Reports" section.

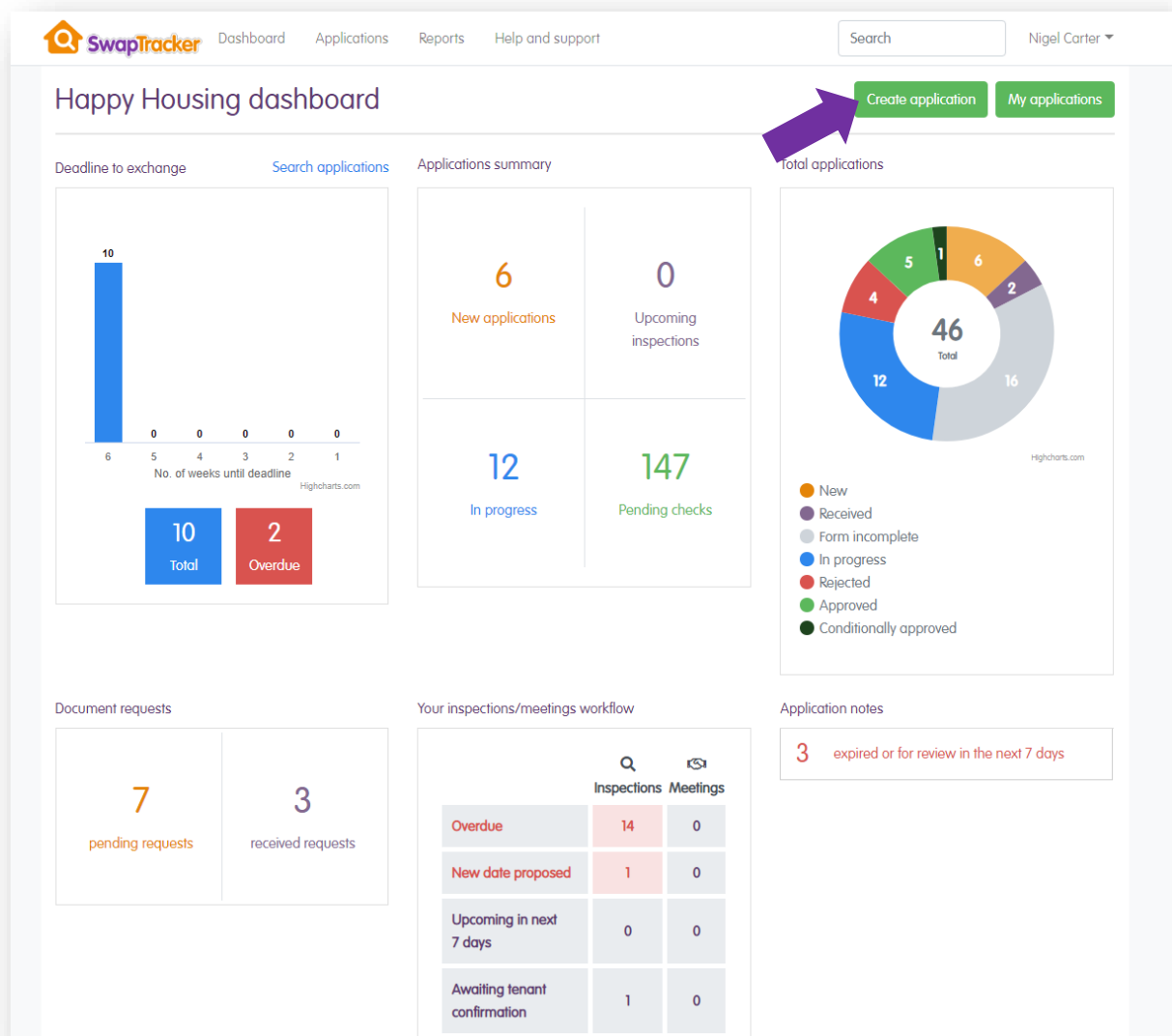
HOW TENANTS APPLY (NOT USING HOMESWAPPER)

Anyone can apply to you for an exchange using SwapTracker, even if:

- They are not on HomeSwapper
- They are not currently your tenant
- Their landlord does not use SwapTracker

You can do this by sending an application “**invite**” to them.

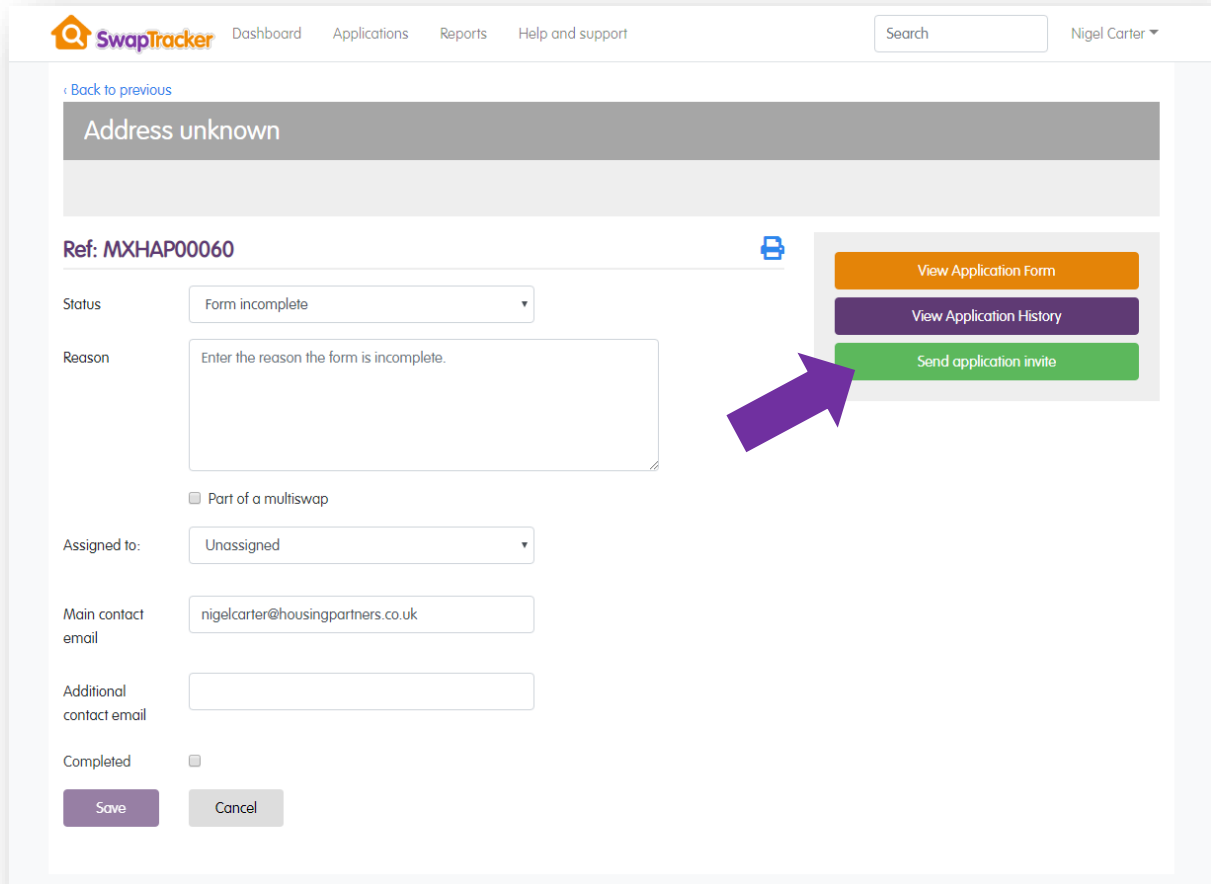
First click on the “*Create application*” button on your SwapTracker dashboard:



This creates a base application with a status of “Form incomplete”.

It has a reference number allocated, but at this point has no tenant details.

To send the invite, click on “*Send application invite*”:



The screenshot shows the SwapTracker application form for a tenant with the status 'Form incomplete'. The reference number is MXHAP00060. The form includes fields for Status (Form incomplete), Reason (Enter the reason the form is incomplete.), Assigned to (Unassigned), Main contact email (nigelcarter@housingpartners.co.uk), and Additional contact email. There are buttons for 'View Application Form', 'View Application History', and 'Send application invite'. A purple arrow points to the 'Send application invite' button.

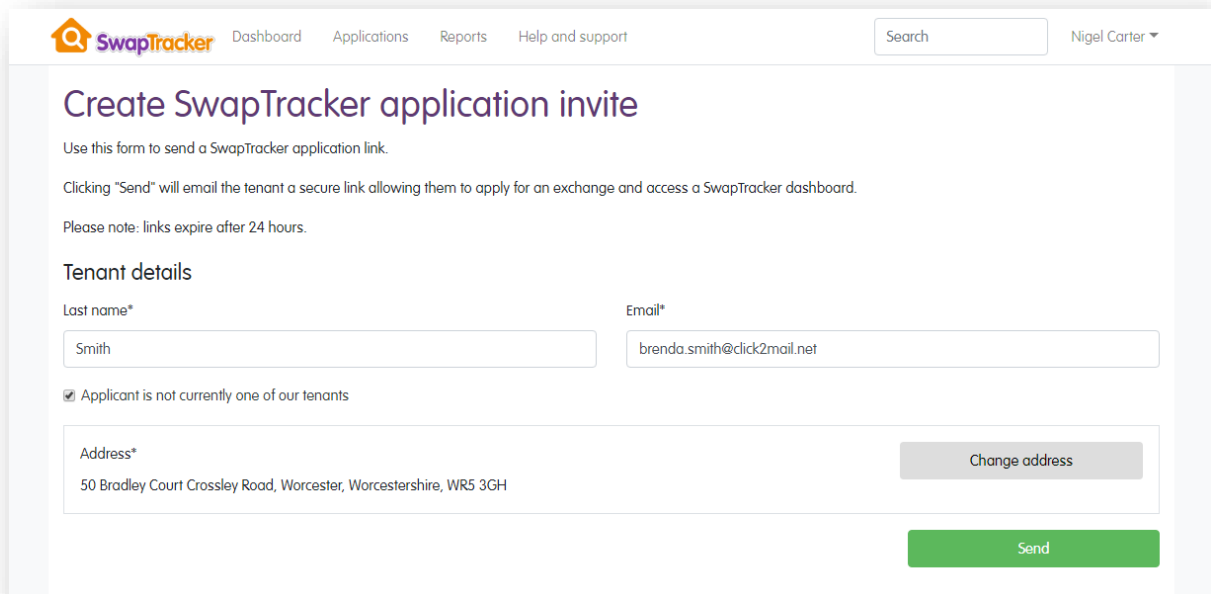
You now need to enter some basic details of the tenant you want to send an invite to:

- Last name
- Email address
- Their current address

All these fields are mandatory.

The tenant’s last name and their postcode are required because they will need to enter these later to confirm the invite has been sent to the correct person.

The email address is required because the invite must be sent as an email.



The screenshot shows the 'Create SwapTracker application invite' page. At the top, there's a navigation bar with 'Dashboard', 'Applications', 'Reports', and 'Help and support'. A search bar and the user name 'Nigel Carter' are on the right. The main heading is 'Create SwapTracker application invite'. Below it, instructions state: 'Use this form to send a SwapTracker application link.' and 'Clicking "Send" will email the tenant a secure link allowing them to apply for an exchange and access a SwapTracker dashboard.' A note says 'Please note: links expire after 24 hours.' The 'Tenant details' section has two input fields: 'Last name*' with 'Smith' and 'Email*' with 'brenda.smith@click2mail.net'. A checkbox labeled 'Applicant is not currently one of our tenants' is checked. Below this is an 'Address*' field containing '50 Bradley Court Crossley Road, Worcester, Worcestershire, WR5 3GH' and a 'Change address' button. A green 'Send' button is at the bottom right.

There is also an “*Applicant is not currently one of our tenants*” tick box.

If you are sending this to a person who is not one of your tenants at present, tick this box.

SwapTracker needs this information because the application forms the tenant will be asked to complete can differ depending on whether they are a current tenant of yours or not.

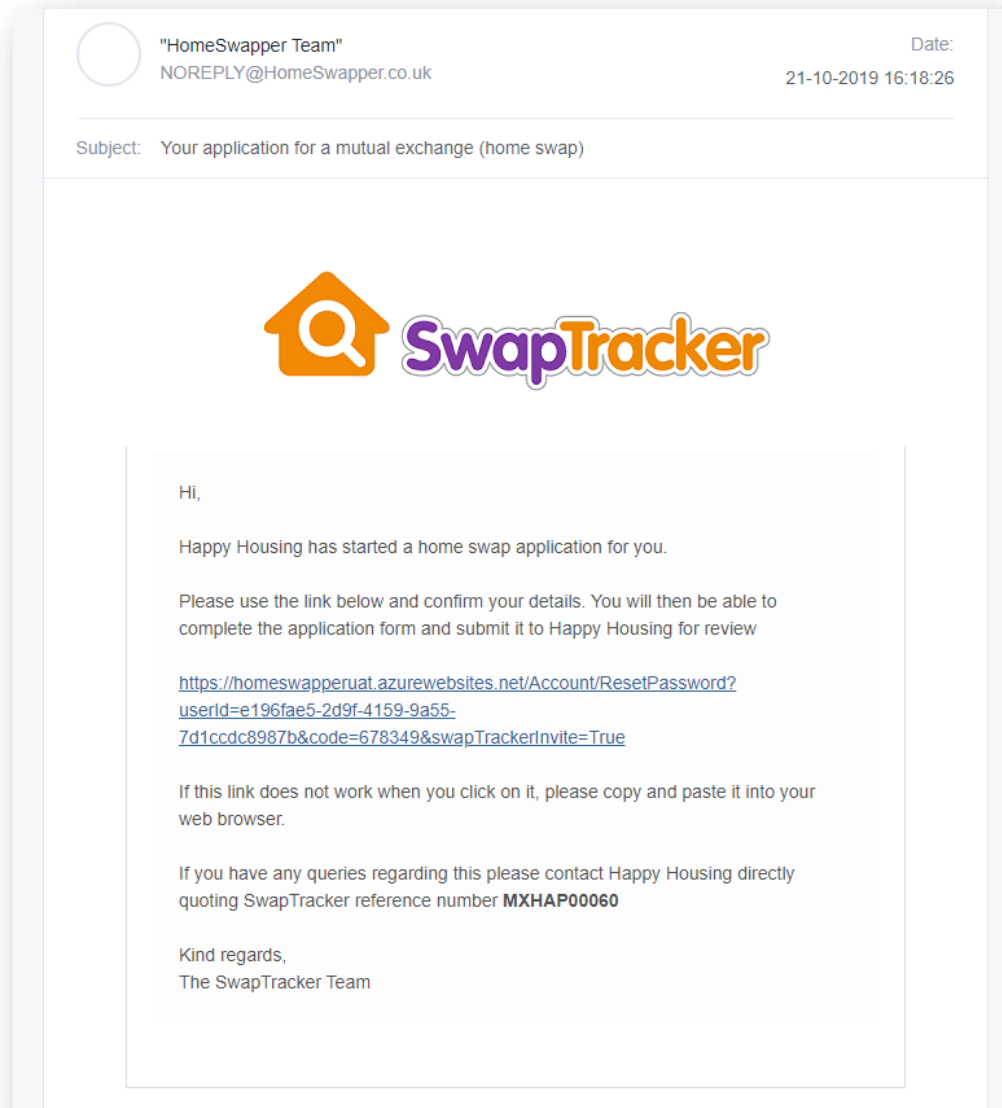
Clicking “Send” will send the invite to the tenant (you will be asked to confirm this first).

If you have made a mistake or need to re-send the invite, simply click on the “*Amend application invite*” or “*Re-send application invite*” buttons on the Application Summary page.

Note: “invites” work differently depending on if that person already has a HomeSwapper account or not. The differences are explained below.

Invites for someone who does not have a HomeSwapper account

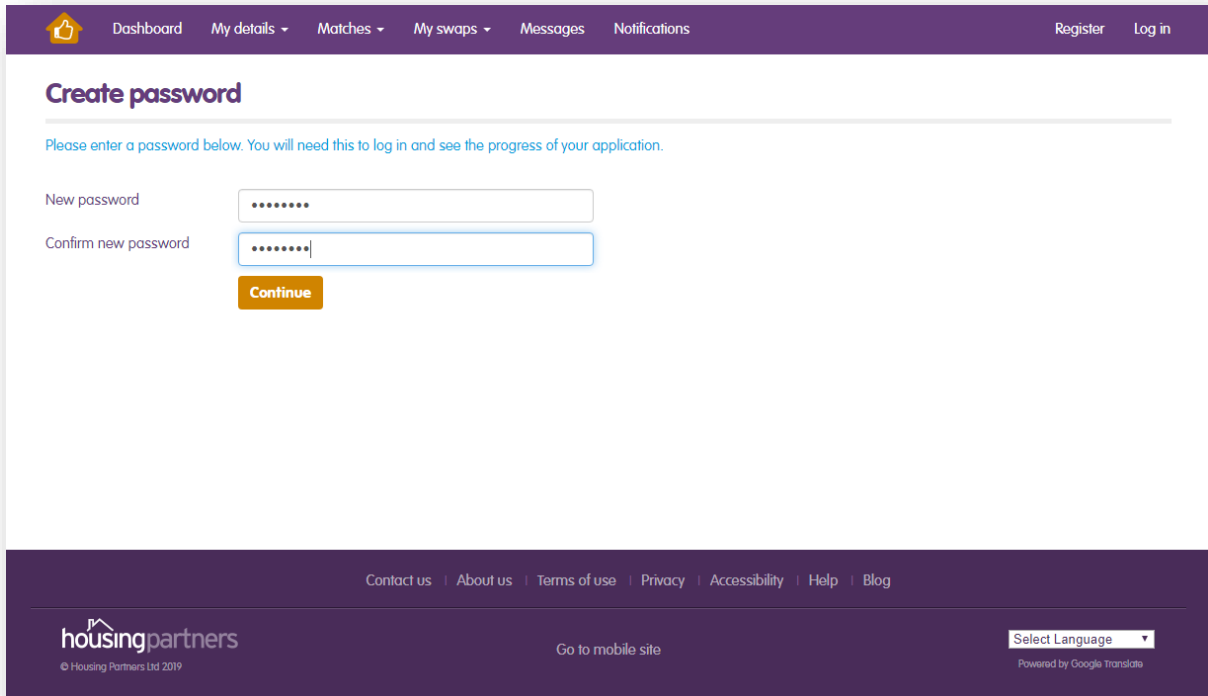
The tenant is sent an email invite which includes their SwapTracker reference number and a secure link for them to start their application.



Note: for security reasons these links expire after 24 hours and will need to be re-sent.

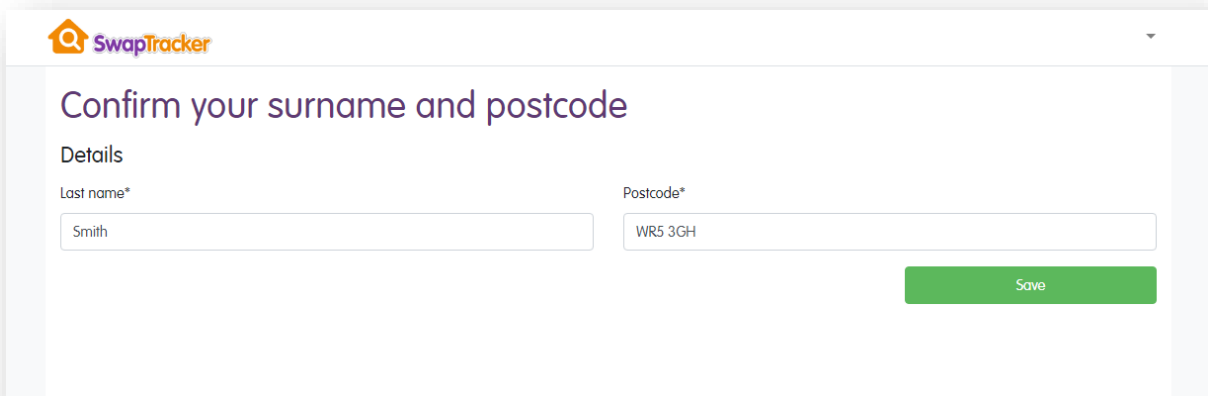
When the tenant uses the link in the email, they are taken to a page to enter a password for their SwapTracker application.

This is required so they can login later to continue their application or view their SwapTracker dashboard after applying.



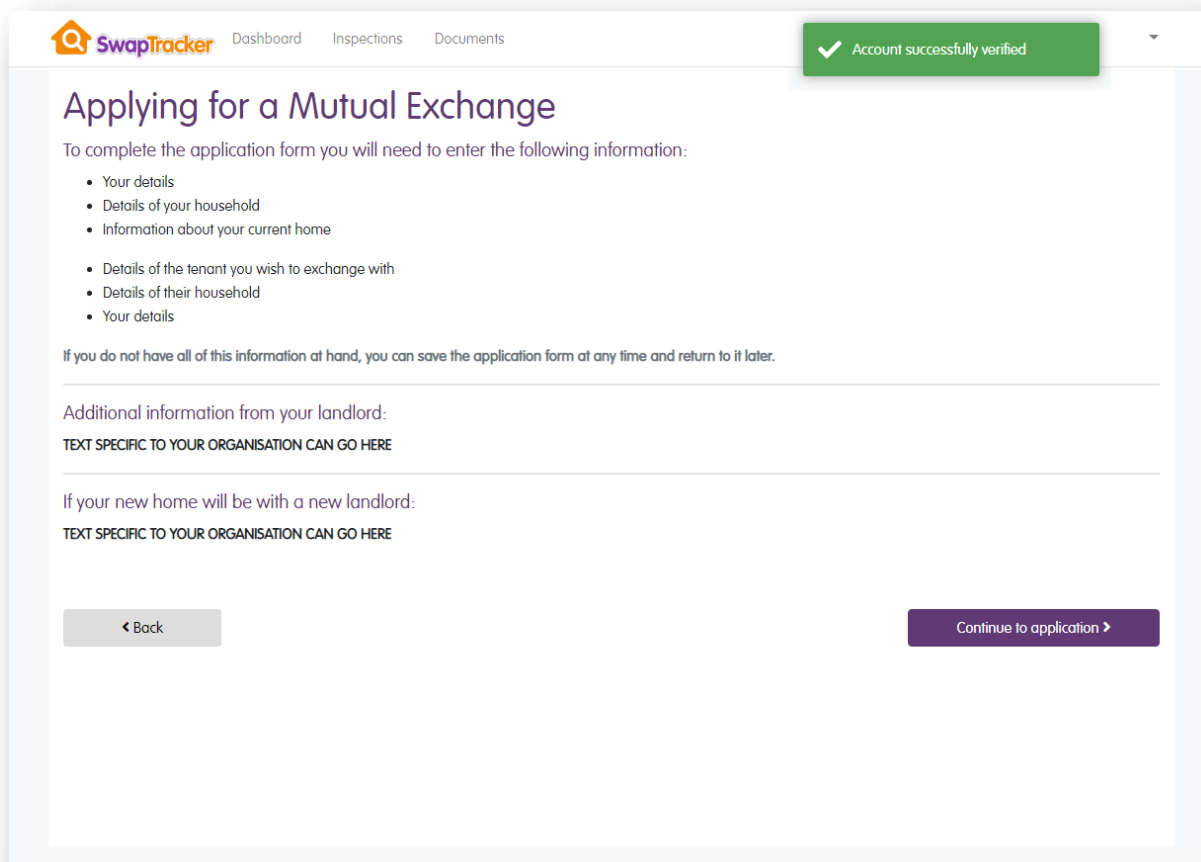
The screenshot shows the 'Create password' page of the SwapTracker application. The page has a purple header with navigation links: Dashboard, My details, Matches, My swaps, Messages, and Notifications. On the right side of the header are links for Register and Log in. The main content area is white and titled 'Create password'. Below the title is a blue instruction: 'Please enter a password below. You will need this to log in and see the progress of your application.' There are two input fields: 'New password' and 'Confirm new password', both containing masked text (dots). Below the fields is an orange 'Continue' button. The footer is purple and contains links: Contact us, About us, Terms of use, Privacy, Accessibility, Help, and Blog. On the left is the 'housingpartners' logo with the copyright notice '© Housing Partners Ltd 2019'. In the center is a link 'Go to mobile site'. On the right is a 'Select Language' dropdown menu and the text 'Powered by Google Translate'.

Next, they must confirm their last name and postcode. This should match the details you entered when creating the application invite earlier.



The screenshot shows the 'Confirm your surname and postcode' page of the SwapTracker application. The page has a white header with the SwapTracker logo on the left and a dropdown arrow on the right. The main content area is white and titled 'Confirm your surname and postcode'. Below the title is a section titled 'Details'. There are two input fields: 'Last name*' with the value 'Smith' and 'Postcode*' with the value 'WR5 3GH'. Below the fields is a green 'Save' button.

If these details match, the account is successfully verified, and they can apply online in the same way they would do coming from HomeSwapper:



The screenshot shows the SwapTracker web interface. At the top, there's a navigation bar with the SwapTracker logo, 'Dashboard', 'Inspections', and 'Documents' links. A green notification banner in the top right corner says '✓ Account successfully verified'. The main heading is 'Applying for a Mutual Exchange'. Below it, a paragraph states: 'To complete the application form you will need to enter the following information:'. This is followed by a bulleted list: 'Your details', 'Details of your household', 'Information about your current home', 'Details of the tenant you wish to exchange with', 'Details of their household', and 'Your details'. A note below the list says: 'If you do not have all of this information at hand, you can save the application form at any time and return to it later.' There are two text input fields, each preceded by a label: 'Additional information from your landlord:' and 'If your new home will be with a new landlord:'. Both fields contain the placeholder text 'TEXT SPECIFIC TO YOUR ORGANISATION CAN GO HERE'. At the bottom, there are two buttons: a grey '← Back' button on the left and a purple 'Continue to application →' button on the right.

SwapTracker Dashboard Inspections Documents

✓ Account successfully verified

Applying for a Mutual Exchange

To complete the application form you will need to enter the following information:

- Your details
- Details of your household
- Information about your current home
- Details of the tenant you wish to exchange with
- Details of their household
- Your details

If you do not have all of this information at hand, you can save the application form at any time and return to it later.

Additional information from your landlord:
TEXT SPECIFIC TO YOUR ORGANISATION CAN GO HERE

If your new home will be with a new landlord:
TEXT SPECIFIC TO YOUR ORGANISATION CAN GO HERE

← Back

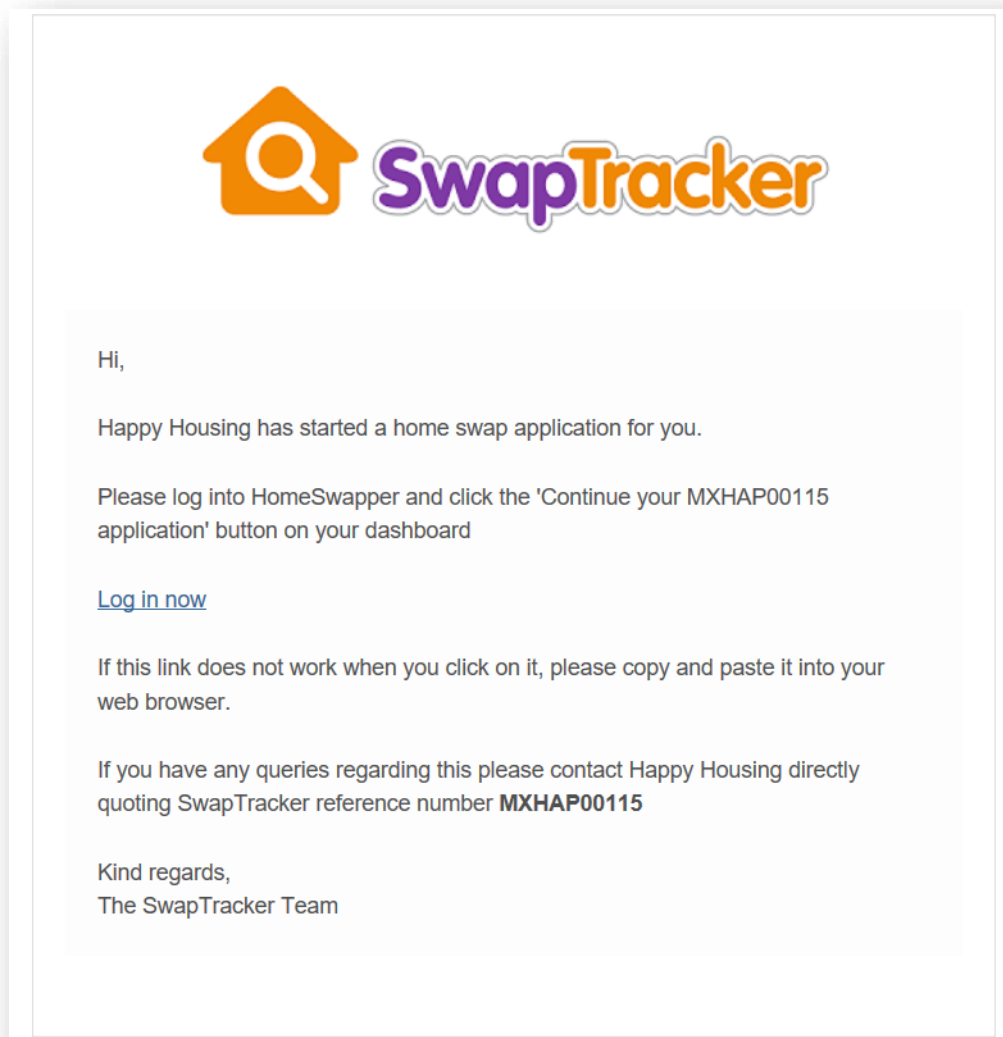
Continue to application →

Invites for someone who already has a HomeSwapper account

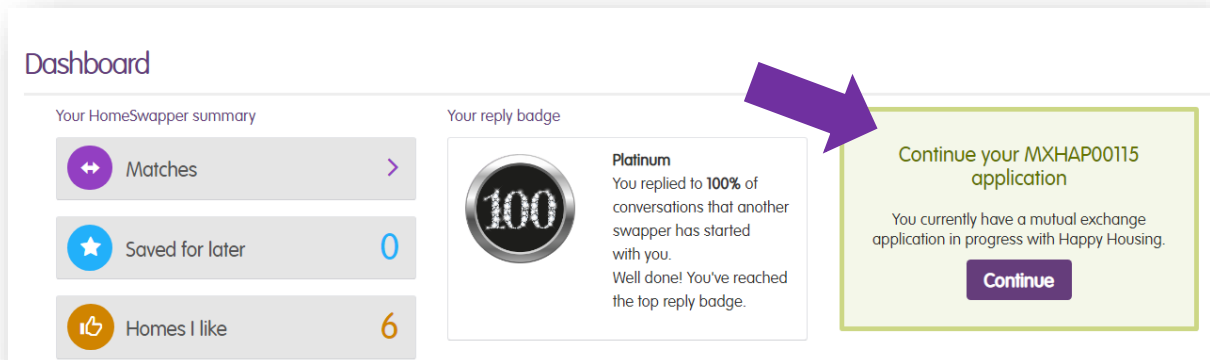
If they already have a HomeSwapper account, they are sent a different email.

This tells them to log into their HomeSwapper account, where they can now apply for an exchange to your organisation.

They do not need to confirm their last name and postcode.

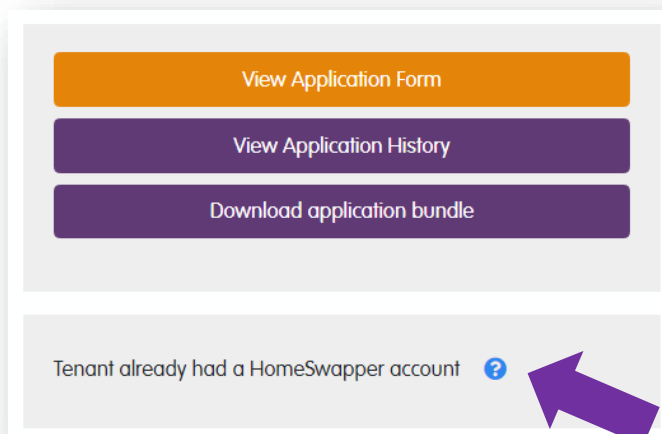


When they log into HomeSwapper, they will see a panel on their dashboard inviting them to continue with their application.



Clicking this takes them to the SwapTracker application form so they can apply to you online.

In SwapTracker, their "Application Summary" page will also show you they had a HomeSwapper account.

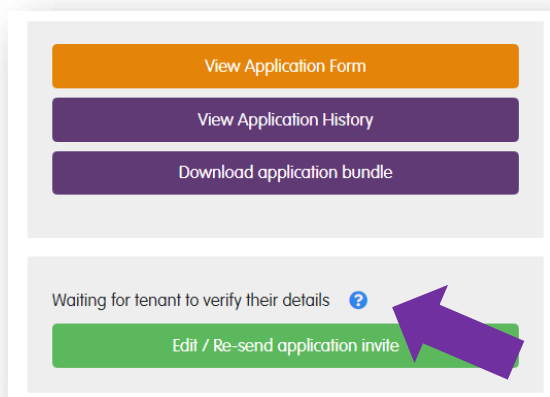


If they have any difficulties applying, simply tell to log into HomeSwapper and apply as above.

Keeping track of Application “invites”

After you’ve sent an “invite” to someone to apply via SwapTracker, you obviously want to be able to check their progress.

In the “Application Summary” page you can see that the invite has been sent and you are waiting for the tenant to verify their details. At this stage, you can edit the invite or re-send it if required:



In their “Application History” section, you can also see when the invite was sent:

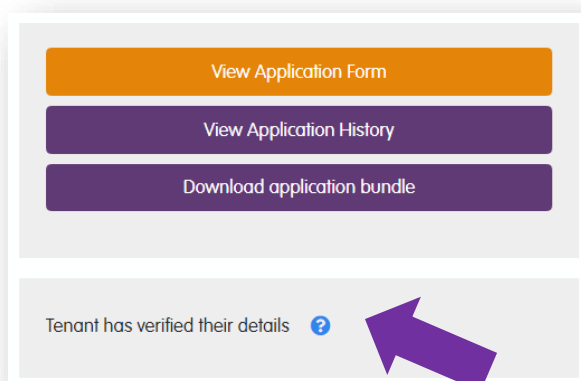
History - MXHAP00112

Date	Type	Description	User
21/08/2020	Application status changed (general)	Application status changed to New	misere7012@delotti.com
21/08/2020	Application form submitted	Application form submitted	misere7012@delotti.com
21/08/2020	Application invite verified	Application invite verified	misere7012@delotti.com
21/08/2020	Application invite created	Application invite created	nigelcarter@housingpartners.co.uk

When they do verify their details (i.e. they used the secure link and confirmed their name/postcode) this is also recorded in the “Application History”:

21/08/2020	Application form submitted	Application form submitted	misere7012@delotti.com
21/08/2020	Application invite verified	Application invite verified	misere7012@delotti.com
21/08/2020	Application invite created	Application invite created	nigelcarter@housingpartners.co.uk

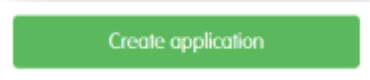
The “Application Summary” page now shows they have done this too:



If they have any difficulties applying now, simply tell to log into HomeSwapper using their email address and the password they entered when verifying their details.

Adding an Application on behalf of a Tenant

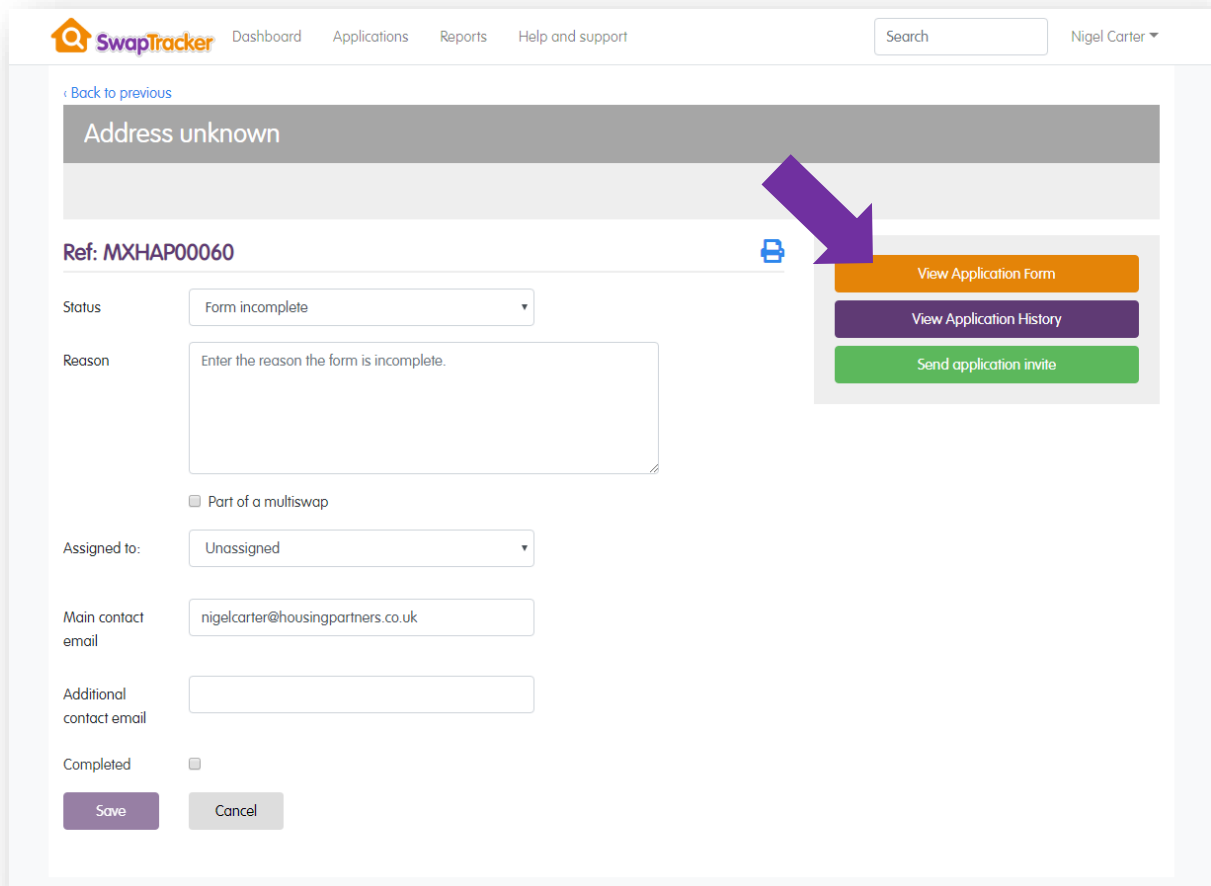
If you need to create a MX application on behalf of a tenant (for example they've already completed a paper form), use the “*Create application*” button at the top of your SwapTracker dashboard.



Clicking this creates a base application with a status of “Form incomplete”.

It has a reference number allocated, but at this point it has no tenant details.

Clicking on the “*View Application form*” button will then take you to the application form which you can complete on their behalf.



SwapTracker Dashboard Applications Reports Help and support Search Nigel Carter ▾

◀ Back to previous

Address unknown

Ref: MXHAP00060

Status: Form incomplete ▾

Reason: Enter the reason the form is incomplete.

☐ Part of a multiswap

Assigned to: Unassigned ▾

Main contact email: nigelcarter@housingpartners.co.uk

Additional contact email:

Completed: ☐

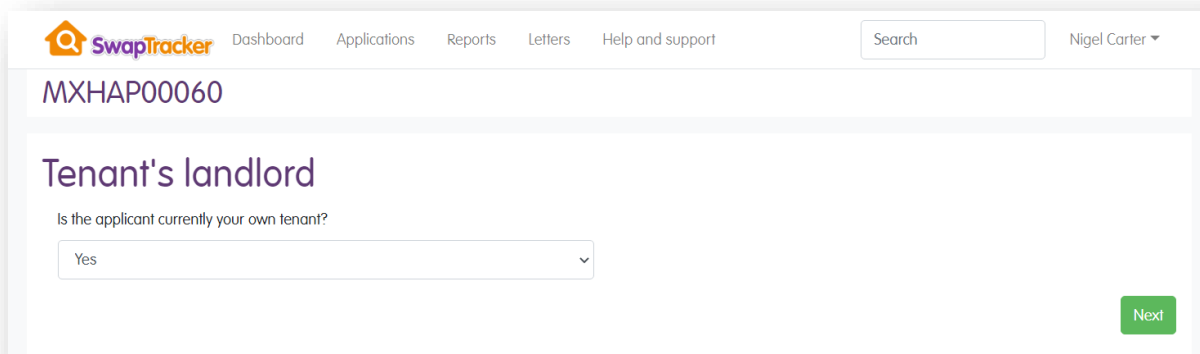
Save Cancel

View Application Form

View Application History

Send application invite

Before entering the tenant's information, you are first prompted to specify if the person is currently your tenant or is an incoming tenant.



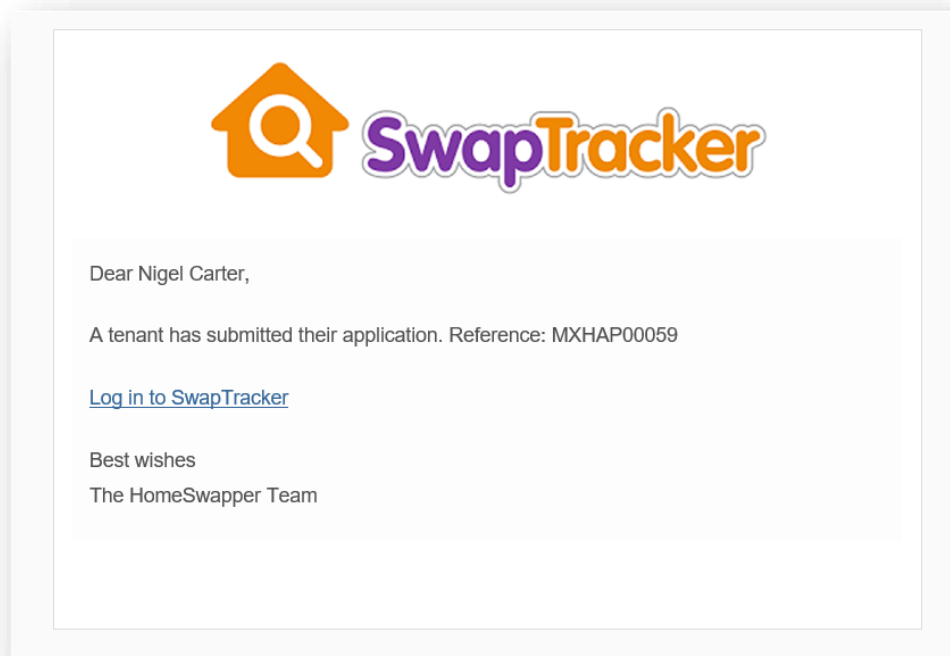
The screenshot shows the SwapTracker web application interface. At the top, there is a navigation bar with the SwapTracker logo, a search bar, and user information (Nigel Carter). Below the navigation bar, the main content area displays the application ID 'MXHAP00060'. The section is titled 'Tenant's landlord' and asks the question 'Is the applicant currently your own tenant?'. A dropdown menu is shown with 'Yes' selected. A green 'Next' button is located at the bottom right of the form.

This is required because your application form may ask different questions for new and current tenants.

DEALING WITH “NEW” APPLICATIONS


When a tenant submits their application, the status is set to “New”.

The main contact for your organisation will get an email notification as below:



Setting the application status to “Received” will notify the tenant that their application has been received but is not yet “In progress”.

This is done by selecting the relevant status from the “Status” list on the Application Summary.


[Dashboard](#)
[Applications](#)
[Reports](#)
[Help and support](#)

Search

Nigel Carter ▾

[Back to previous](#)

35 Romney Way, Worcester, Worcestershire, WR5 2DW

LINK APPLICATION

James Jones
Barbara Jones

Ref: MXHAP00059

Status

Received
New
Received
In progress
Rejected
Approved
Conditionally approved
Cancelled
Deleted
Form incomplete

Assigned to:

Main contact email

Additional contact email

Completed ☐

Save Cancel

View Application Form

View Application History

Incoming tenant

Tenant name
Brenda Smith
Email
brenda.smith@hotmail.co.uk
Phone number
0789 123 456

Landlord name
Test landlord
Landlord contact email
not provided
Landlord contact number
not provided

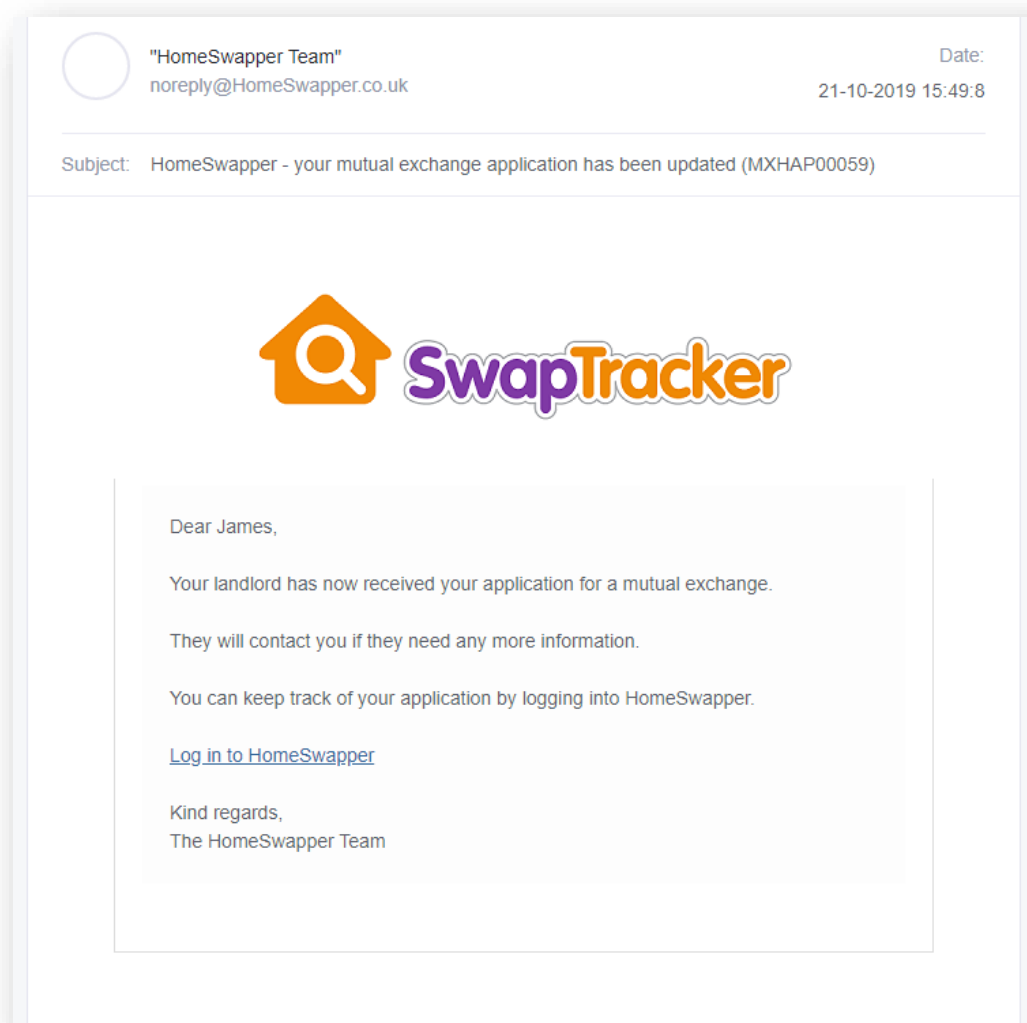
Actions	Completed	Remaining	View	Add now
Checks	0	6		+
Inspections/meetings	0	0		+

Documents	Total	View	Add now
Documents received	0		+
Documents requested	0		+

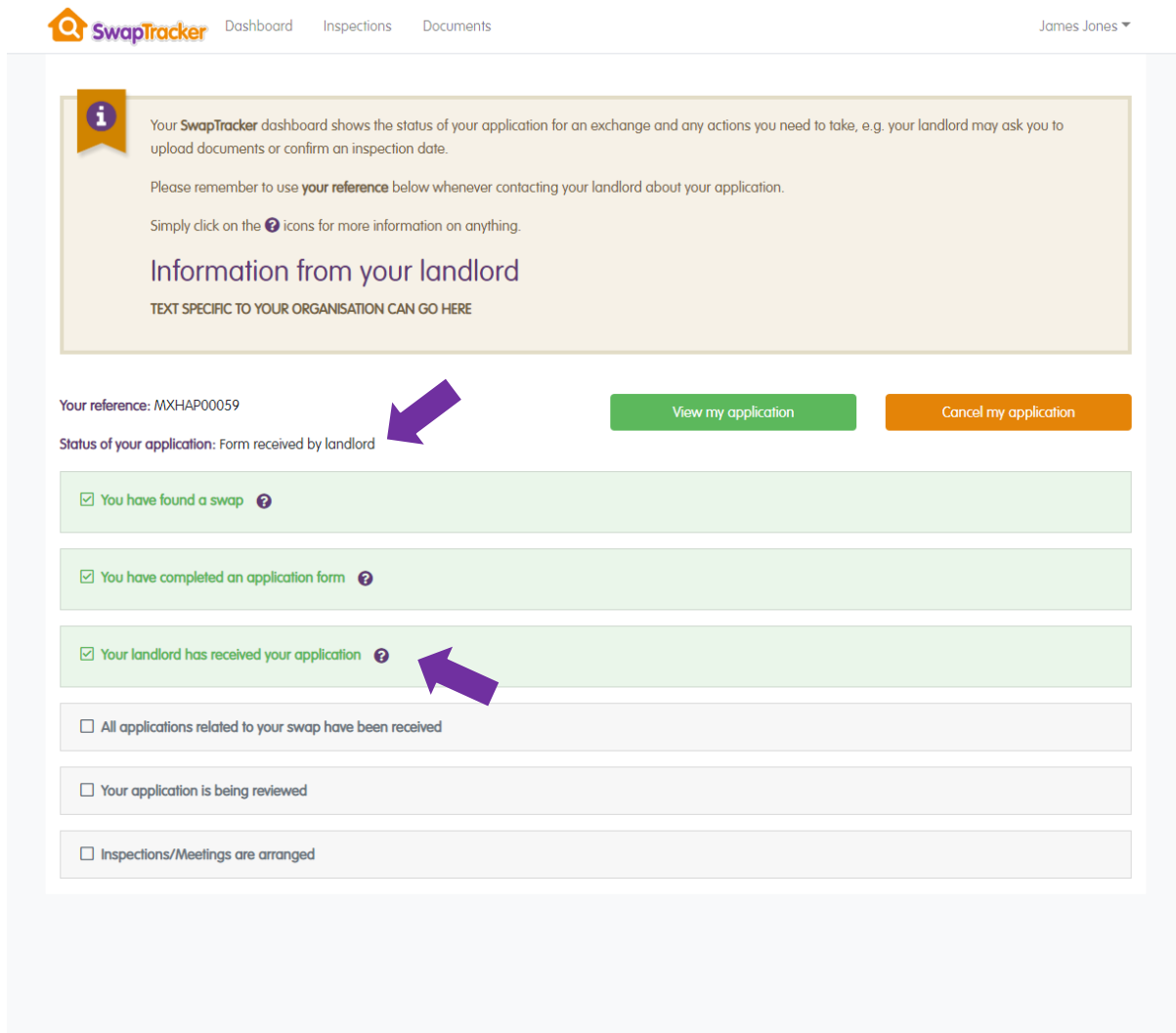
Note: You must click “Save” for this to take effect.

(Only after you set the application to “In Progress” will the 42 days be considered to have started).

The tenant will then get an email notifying them of the change to their application status:



The tenant's SwapTracker dashboard now shows them that their landlord has received their application and the status is changed.



The screenshot shows the SwapTracker tenant dashboard. At the top, there is a navigation bar with the SwapTracker logo, links for Dashboard, Inspections, and Documents, and a user profile for James Jones. Below the navigation bar is a large beige information box containing an information icon, a paragraph about the dashboard's purpose, a reminder to use the reference number, and a link to click on question mark icons for more information. Below this box, the reference number 'MXHAP00059' is displayed, followed by the status 'Form received by landlord'. To the right of the status are two buttons: 'View my application' (green) and 'Cancel my application' (orange). Below the status, there is a list of application steps, each with a checkbox and a question mark icon. The first three steps are checked: 'You have found a swap', 'You have completed an application form', and 'Your landlord has received your application'. The last three steps are unchecked: 'All applications related to your swap have been received', 'Your application is being reviewed', and 'Inspections/Meetings are arranged'. Two purple arrows point to the 'Form received by landlord' status and the 'Your landlord has received your application' step.

SwapTracker Dashboard Inspections Documents James Jones ▼

Information from your landlord
TEXT SPECIFIC TO YOUR ORGANISATION CAN GO HERE

Your reference: MXHAP00059

Status of your application: Form received by landlord

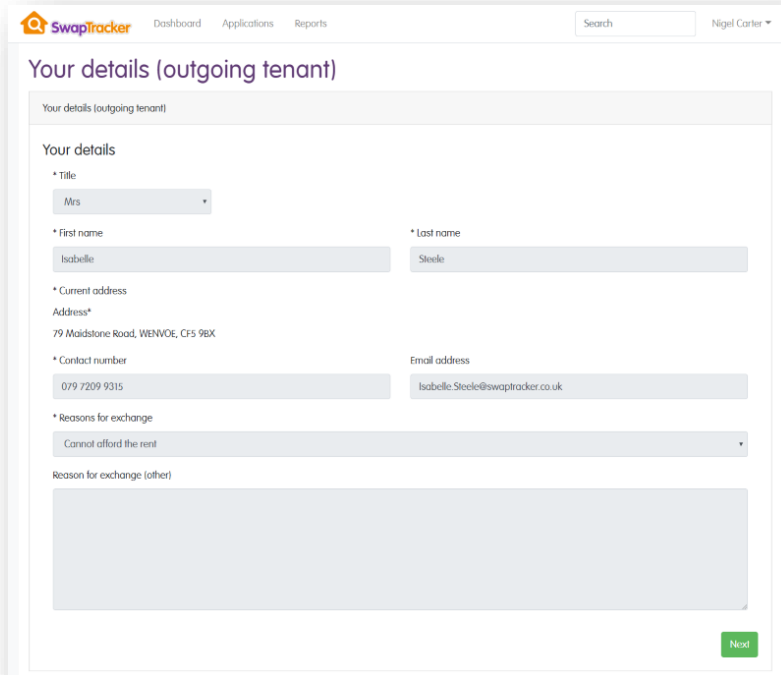
[View my application](#) [Cancel my application](#)

- ☒ You have found a swap ?
- ☒ You have completed an application form ?
- ☒ Your landlord has received your application ?
- ☐ All applications related to your swap have been received
- ☐ Your application is being reviewed
- ☐ Inspections/Meetings are arranged

Reviewing the Application Form

On the Application Summary page, clicking the “*View Application Form*” button will take you to the application form that was submitted by the tenant.

View Application Form



Your details (outgoing tenant)

Your details (outgoing tenant)

Your details

* Title
Mrs

* First name
Isabelle

* Last name
Steele

* Current address
Address*
79 Maidstone Road, WENHOE, CF5 9BX

* Contact number
079 7209 9315

Email address
isabelle.steele@swaptracker.co.uk

* Reasons for exchange
Cannot afford the rent

Reason for exchange (other)

Next

You should now review the form and check you are happy with it, e.g. have they entered all the information you need?

If not, you will need to send it back to the tenant to complete properly (see [Problem with an Applicant's Form?](#)).

Printing forms

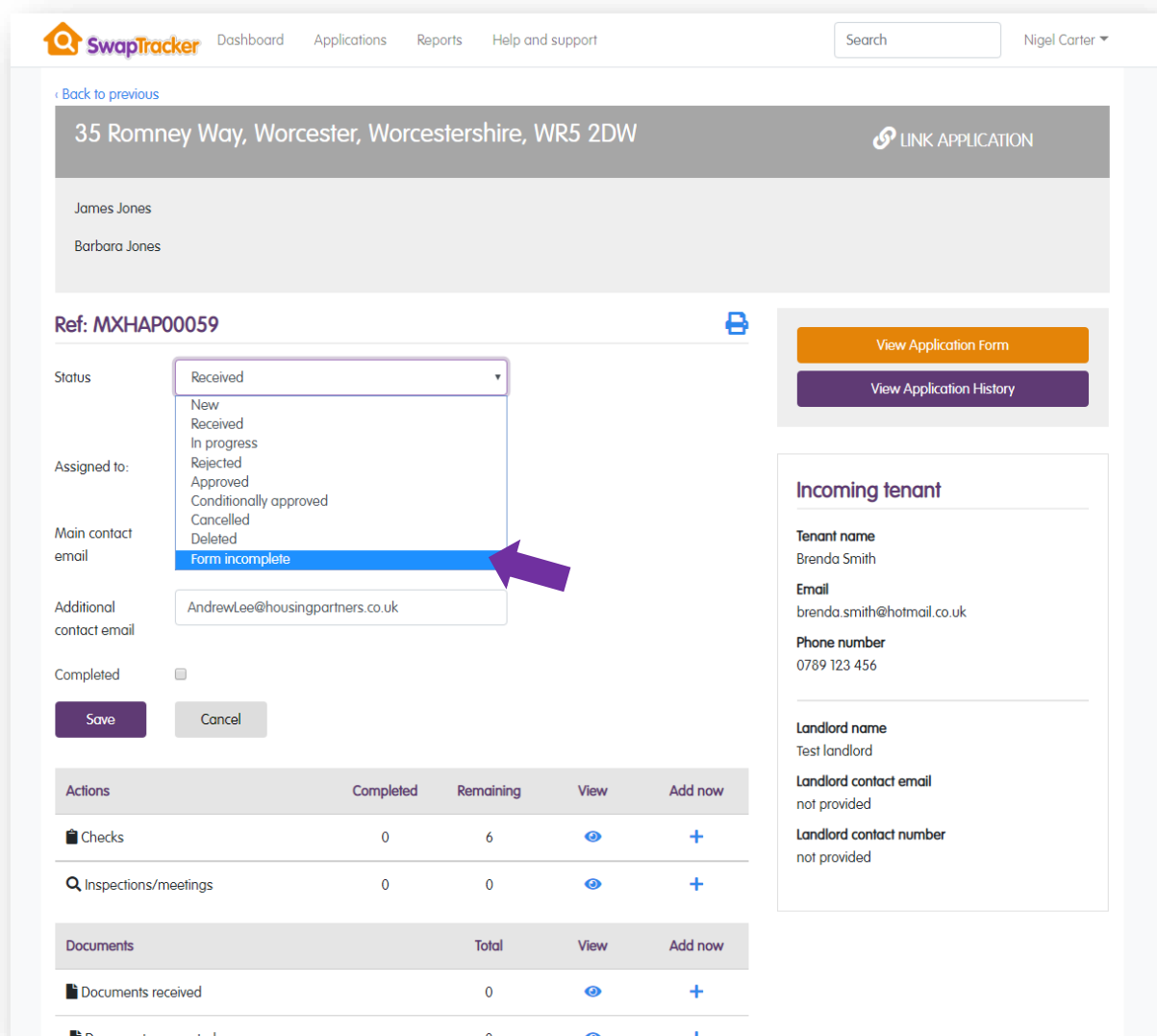


You can print an entire application form by clicking on the printer icon on the Application Summary page. This is also a handy way of seeing the whole form without having to click “Next” on each page.

Problem with an Applicant's Form?

If there is a problem with the form the tenant has submitted, you may need to send it back to them to complete properly.

First, set the status of the Application to "Form incomplete":

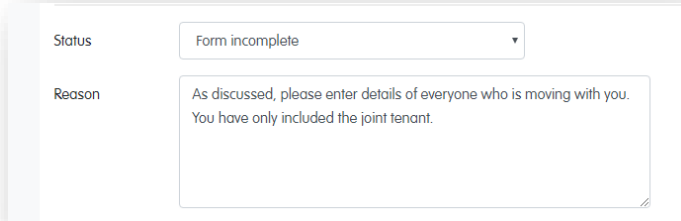


The screenshot shows the SwapTracker application form interface. At the top, there's a navigation bar with 'Dashboard', 'Applications', 'Reports', and 'Help and support'. A search bar and a user profile 'Nigel Carter' are also present. The main content area shows the address '35 Romney Way, Worcester, Worcestershire, WR5 2DW' and a 'LINK APPLICATION' button. Below this, the applicant's name 'James Jones' and 'Barbara Jones' are listed. The reference number 'Ref: MXHAP00059' is displayed. A dropdown menu for 'Status' is open, showing options: 'New', 'Received', 'In progress', 'Rejected', 'Approved', 'Conditionally approved', 'Cancelled', 'Deleted', and 'Form incomplete'. A purple arrow points to the 'Form incomplete' option. To the right, there are buttons for 'View Application Form' and 'View Application History'. Below these, the 'Incoming tenant' section shows details for Brenda Smith, including her email 'brenda.smith@hotmail.co.uk' and phone number '0789 123 456'. The 'Landlord' section shows 'Test landlord' and 'not provided' for contact details. At the bottom, there are tables for 'Actions' and 'Documents'.

Actions	Completed	Remaining	View	Add now
Checks	0	6	View	+
Inspections/meetings	0	0	View	+

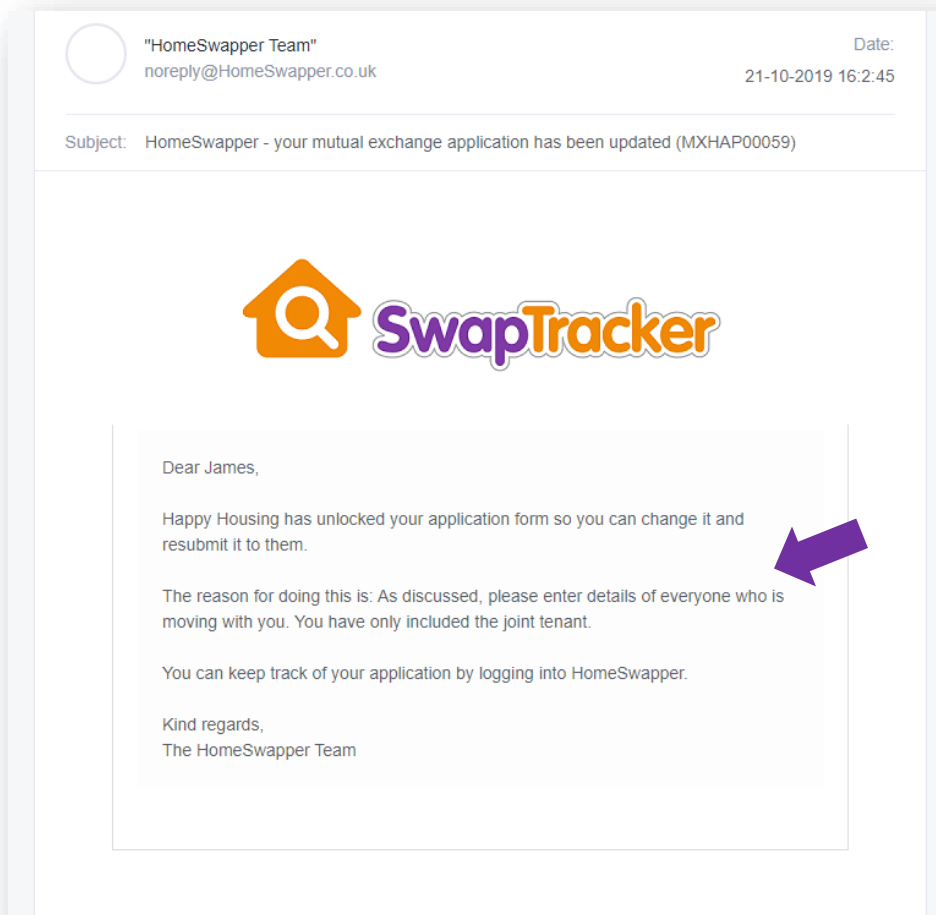
Documents	Total	View	Add now
Documents received	0	View	+
Documents requested	0	View	+

You will then be prompted to enter a reason for why they need to amend and re-submit their form:



After you click “Save”, the tenant will be sent an email notifying them they need to amend the form and re-submit it.

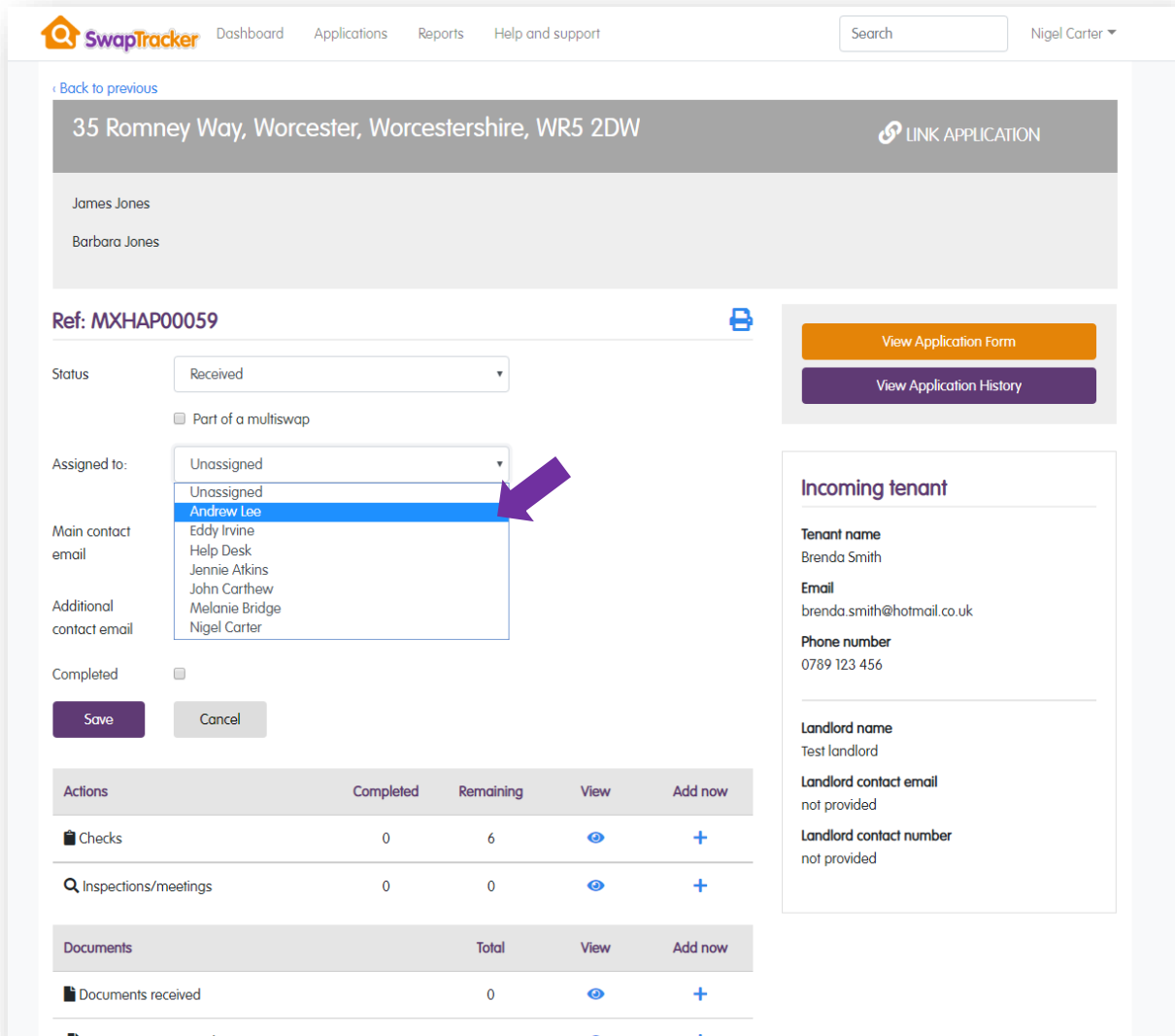
This also includes the reason why:



When they log into SwapTracker their application form will have been unlocked. They can now make the changes they’ve been asked to and re-submit the form to you.

ASSIGNING APPLICATIONS

Applications can be assigned to specific users within your organisation by selecting the relevant person from the list on the Application Summary page.



The screenshot shows the SwapTracker application summary page for a property at 35 Romney Way, Worcester, Worcestershire, WR5 2DW. The application is currently assigned to 'Unassigned'. A dropdown menu is open, showing a list of users: Unassigned, Andrew Lee (highlighted with a blue bar and a purple arrow), Eddy Irvine, Help Desk, Jennie Atkins, John Carthew, Melanie Bridge, and Nigel Carter. The 'Assigned to' field is labeled 'Assigned to:'. Below the dropdown, there are fields for 'Main contact email' and 'Additional contact email'. The 'Status' is set to 'Received'. There are buttons for 'View Application Form' and 'View Application History'. On the right, there is a section for 'Incoming tenant' with fields for 'Tenant name' (Brenda Smith), 'Email' (brenda.smith@hotmail.co.uk), 'Phone number' (0789 123 456), 'Landlord name' (Test landlord), 'Landlord contact email' (not provided), and 'Landlord contact number' (not provided). At the bottom, there are tables for 'Actions' and 'Documents'.

Actions	Completed	Remaining	View	Add now
Checks	0	6	View	+
Inspections/meetings	0	0	View	+

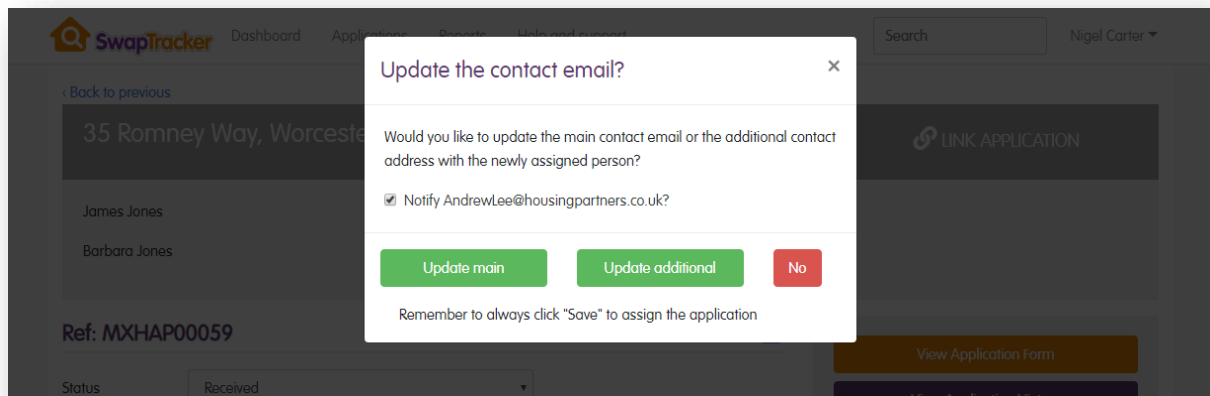
Documents	Total	View	Add now
Documents received	0	View	+
Documents requested	0	View	+

After selecting someone, you will be asked if you want them to be notified of this, i.e. they will receive an email telling them they've been assigned the application.

If you don't want this to happen, un-tick the "Notify" box.

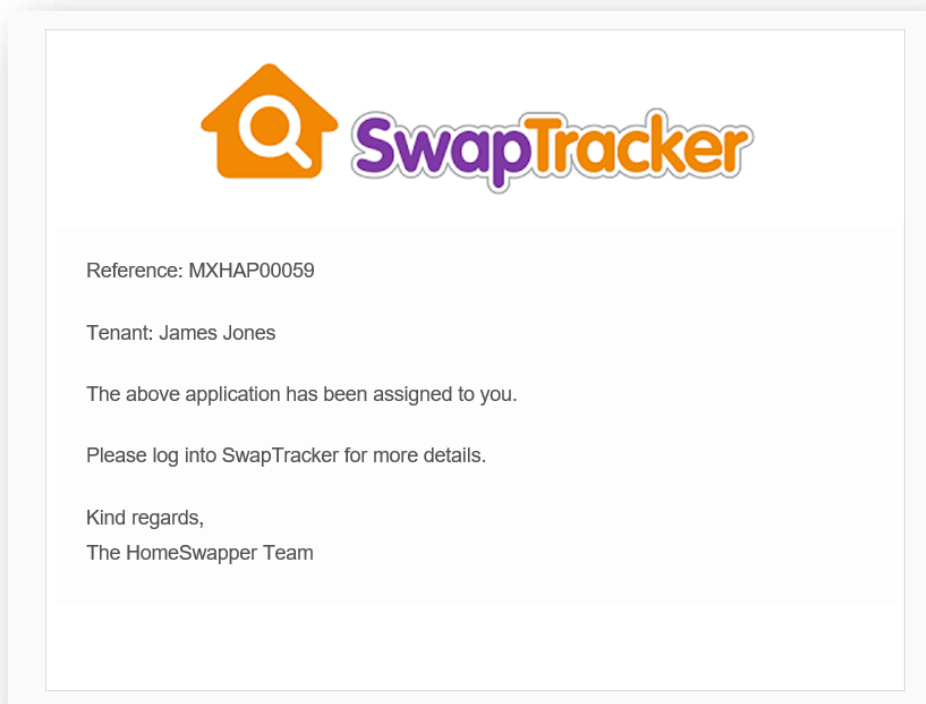
You are also given the option to "Update main" or "Update additional".

Clicking these will set that person's email address to the main contact email or additional contact email address for the application respectively. For example, if you wanted the application to have two email addresses to receive any notifications, click "Update additional".

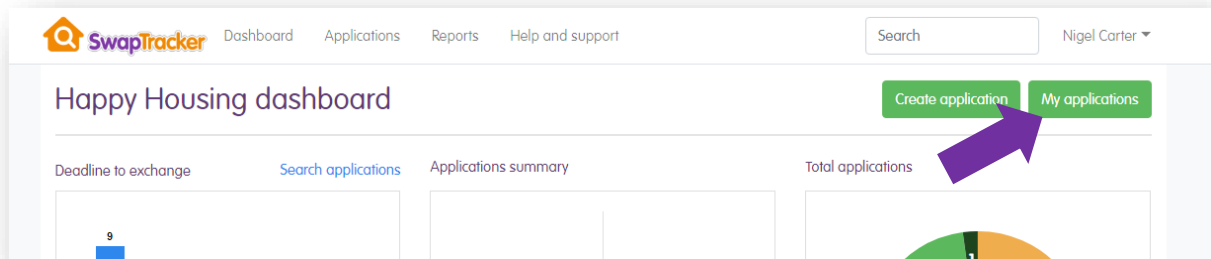


You must click "Save" for these changes to take effect.

If you have chosen to notify the user, they will receive an email like the one below:



To view all the applications that have been assigned to you, click on the “*My applications*” button on your SwapTracker dashboard.



Note: assigning an application to someone does not restrict anyone else from accessing it, e.g. if they were on holiday or absent due to sickness.

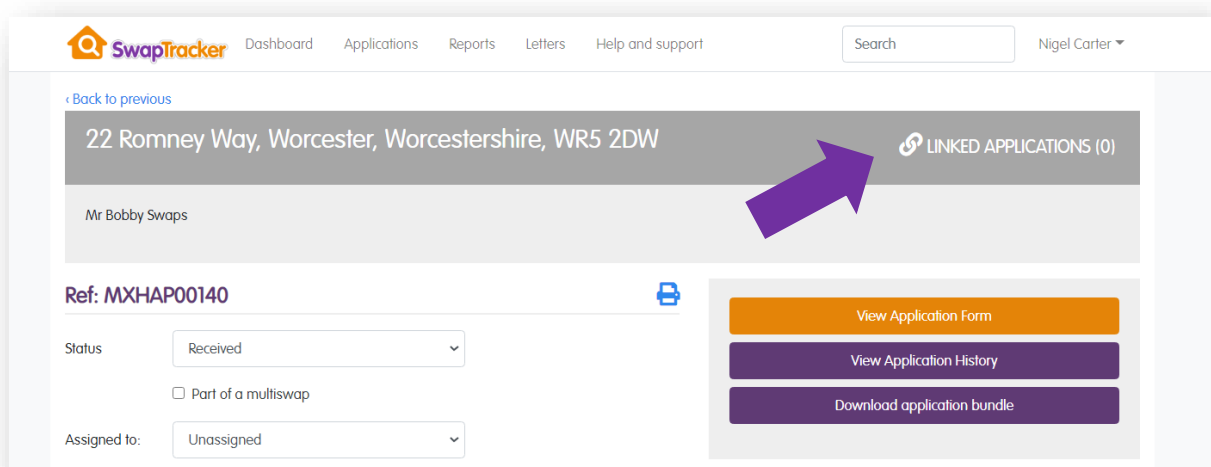
Assigning applications is simply a convenient way of grouping all the applications you are working on currently.

LINKING APPLICATIONS / MULTISWAPS

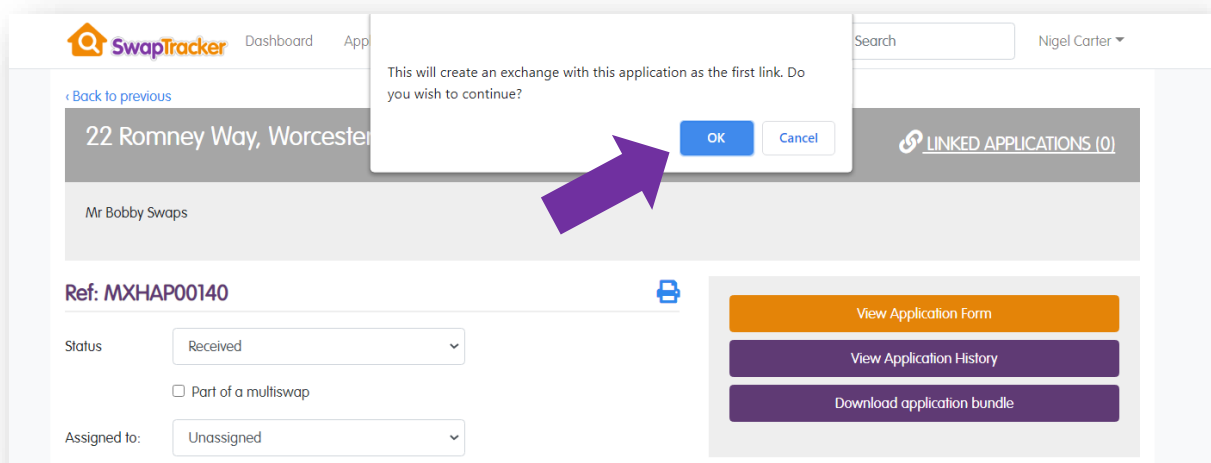
Using SwapTracker you can link all the applications involved in the overall exchange together, so you can see them in one place and keep track of progress. This can be done for just two applications for a direct swap, or more than two in the case of a multiswap.

Creating an “Exchange”

To start building an Exchange, go to the Application Summary of one of the applications involved (it's best to do this on the one you want to be shown as **number 1** in the Exchange) and click on the “*LINKED APPLICATIONS*” icon at the top of the page:



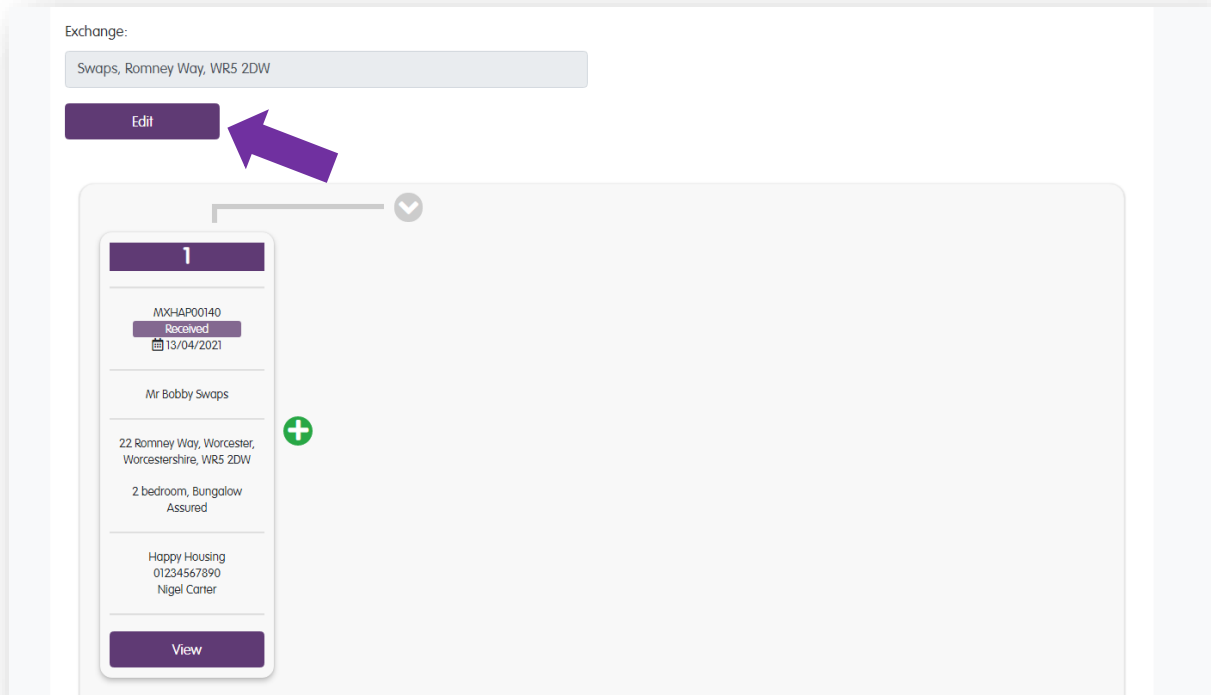
You will be prompted to confirm you want to create an Exchange. Simply click “OK” to continue. Don't worry, you can delete any Exchange later if you need to.



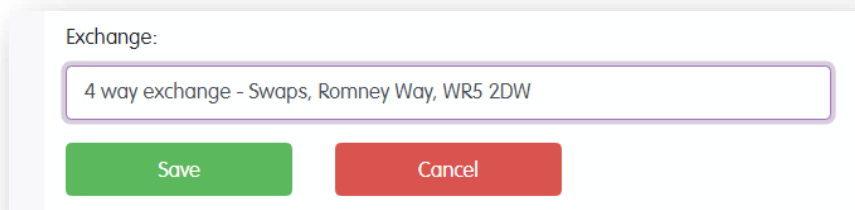
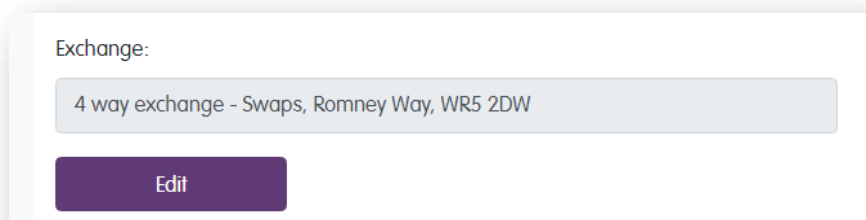
An Exchange is now created with the application you were viewing as number 1 in the chain.

Each Exchange can also be given a name. By default, this is set to the last name of the main tenant, their street and postcode.

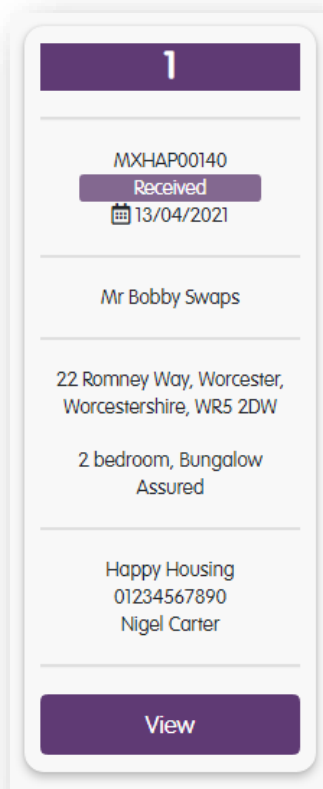
If you want to change the name, simply click the “*Edit*” button:



After entering a new name, click “*Save*” to make the amendment.

Each application in an Exchange shows the following information:

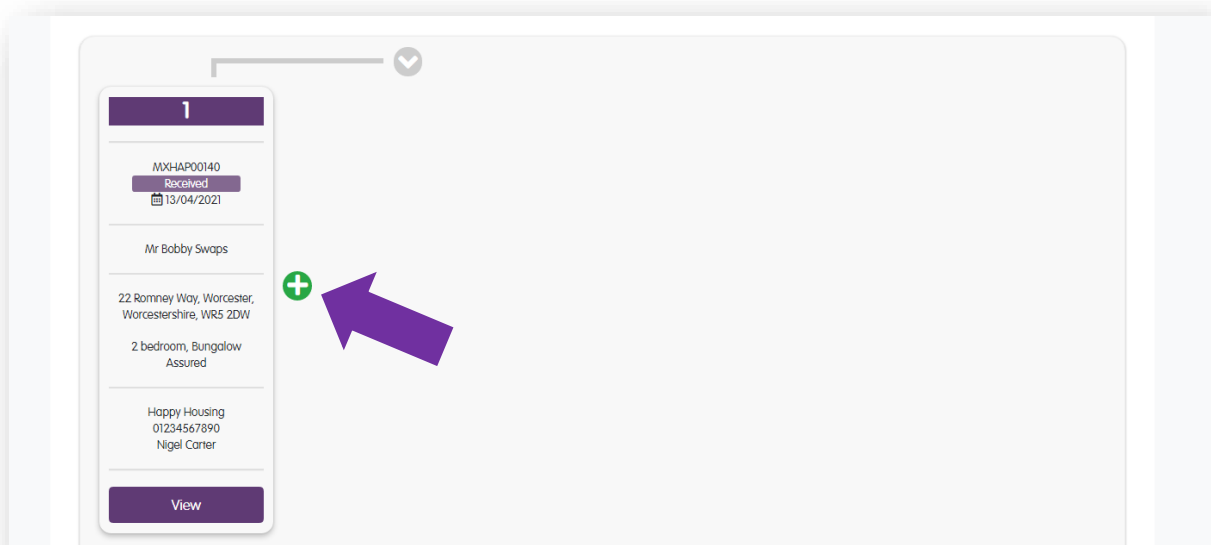


- Application reference number
- Status, e.g. New, Received, etc
- Date created
- Days until decision needed (if "In Progress")
- Main tenant name
- Joint tenant name (if applicable)
- Property address
- Property type and number of bedrooms
- Tenancy type
- Landlord name and contact information

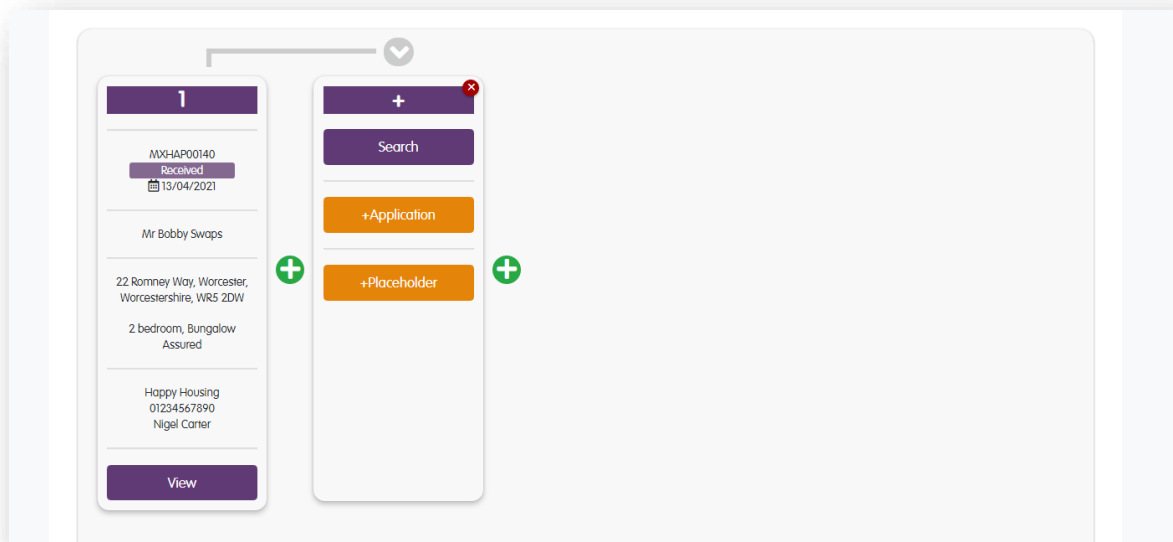
Clicking the "View" button will take you to the Application Summary for that application.

Adding links to your Exchange

To add more links to your Exchange, click on the "+" icon:



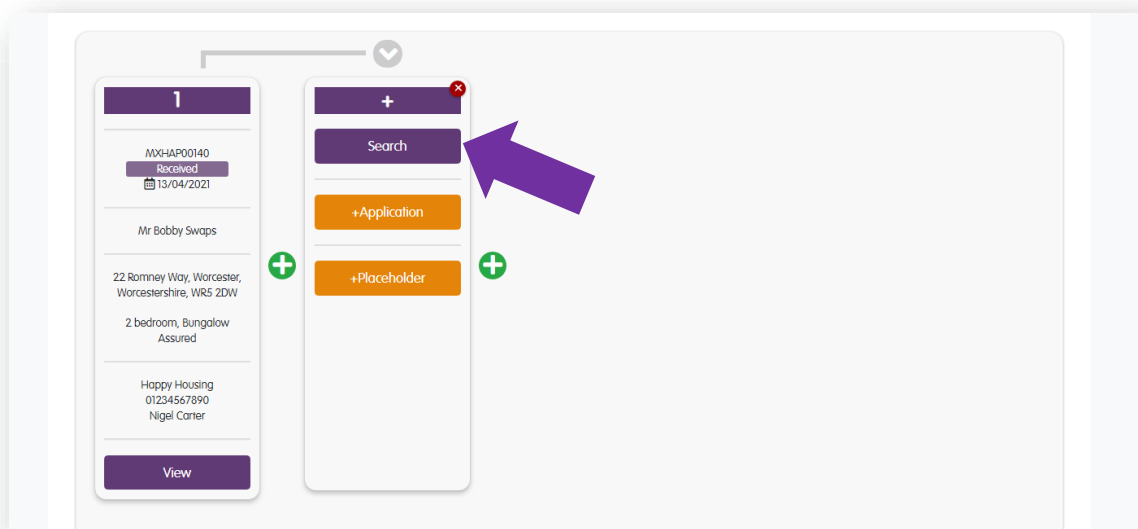
You then get 3 options for the types of link you can add:



- [Search](#) – find an existing application in SwapTracker and add that to the Exchange
- [+Application](#) – create a **new** application in SwapTracker and add this to the Exchange
- [+Placeholder](#) – create a “placeholder” and add this to the Exchange.

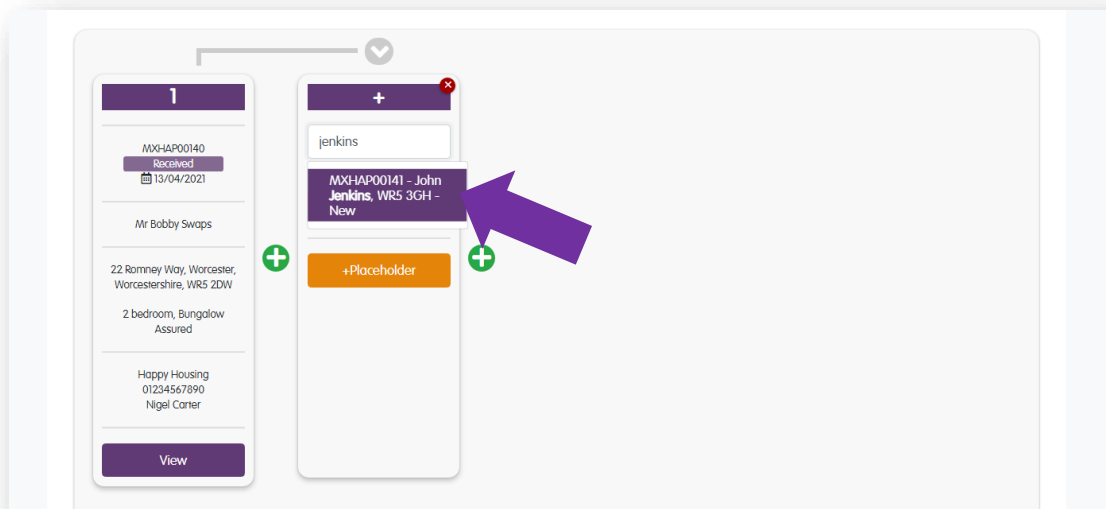
Adding an a existing SwapTracker application to the Exchange

Clicking the “*Search*” button on a new link allows you to search for an application already in SwapTracker and add that to your Exchange.

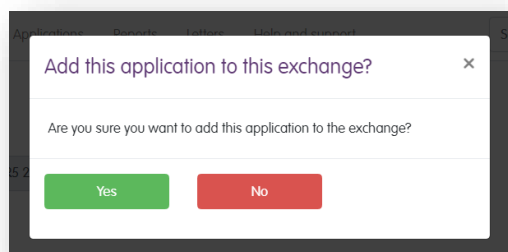


Use the search box that appears to find the application you want to add. You can search by tenant name, address, and the application reference number.

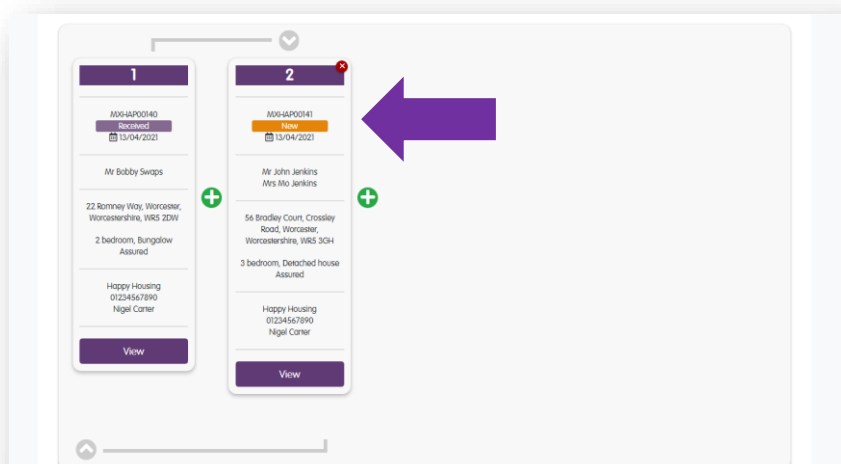
As you type, a list of matching applications is shown. Click on the one you want to add.



Before the application is added, you need to confirm this. Simply click “Yes” to continue:

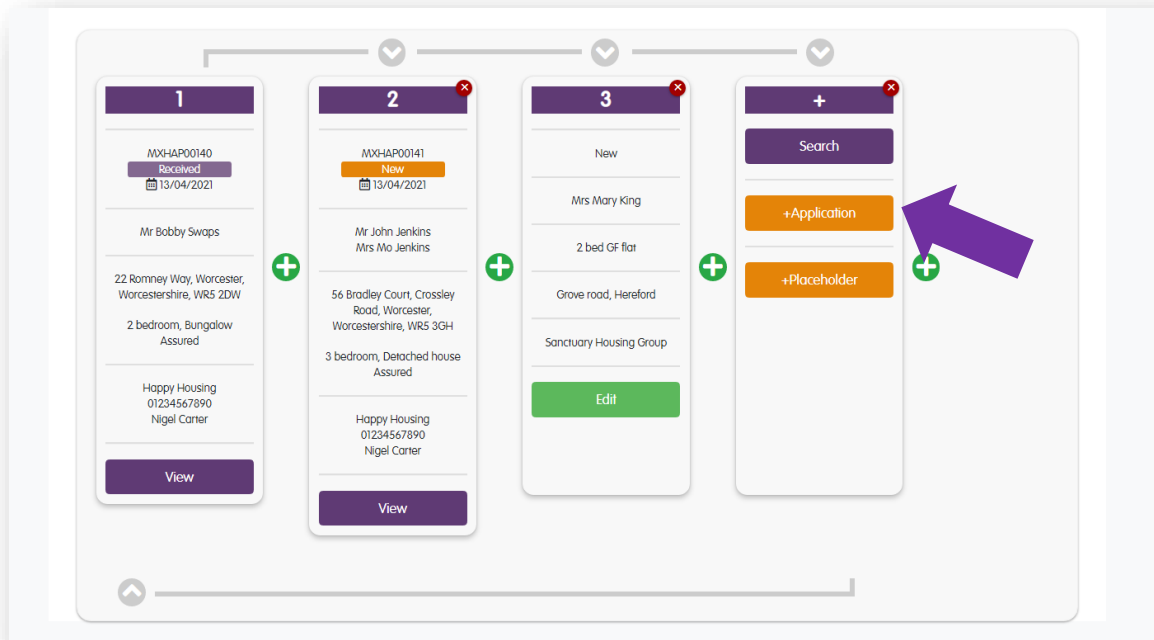


The application you selected is now added to the Exchange.

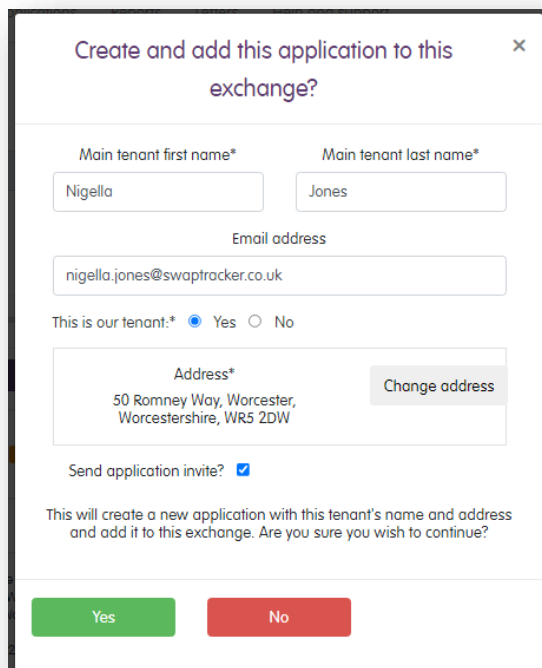


Creating a new application for the Exchange

Clicking the “+Application” button on a new link allows you to create a new application and add that to your Exchange.



You then need to enter some basic details about the application you want to create:



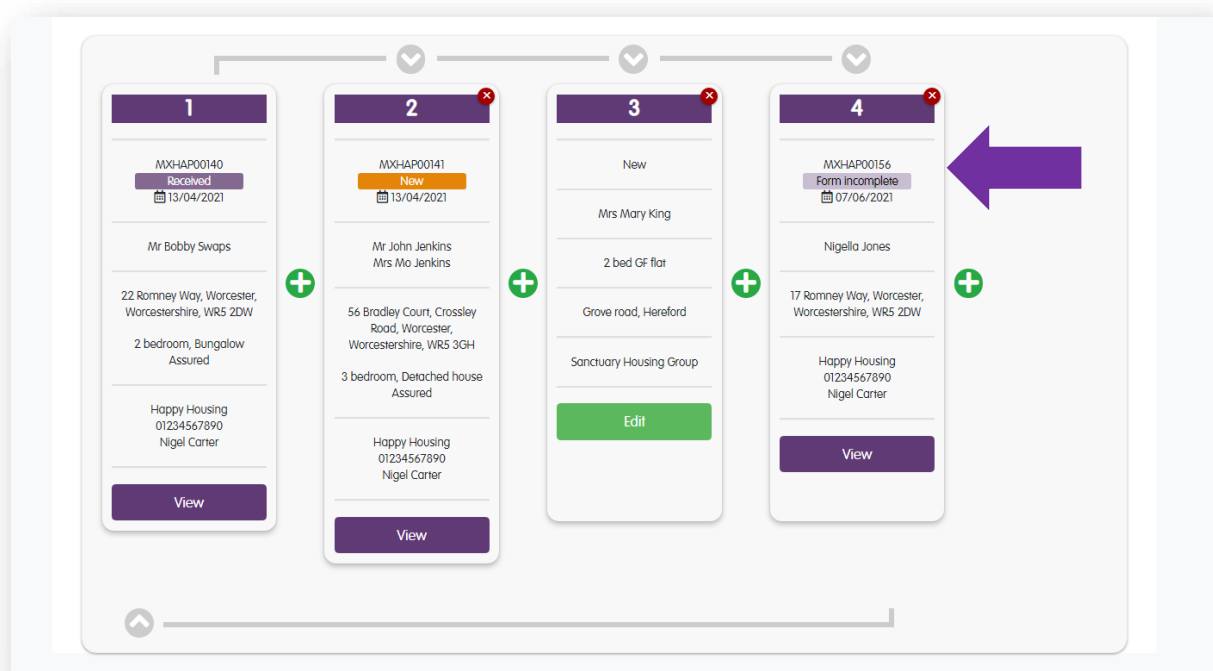
The screenshot shows a form titled "Create and add this application to this exchange?". The form contains the following fields and options:

- Main tenant first name***: Nigella
- Main tenant last name***: Jones
- Email address**: nigella.jones@swaptracker.co.uk
- This is our tenant:** ☒ Yes ☐ No
- Address***: 50 Romney Way, Worcester, Worcestershire, WR5 2DW. There is a "Change address" button next to the address field.
- Send application invite?** ☒
- Confirmation text:** This will create a new application with this tenant's name and address and add it to this exchange. Are you sure you wish to continue?
- Buttons:** Yes (green) and No (red)

The information required is:

- Main tenant first name (mandatory)
- Main tenant last name (mandatory)
- Email address (optional)
- This is our tenant (mandatory) – if “Yes” is selected your organisation is set as the main tenant’s current landlord
- Tenant address (mandatory)
- Send application invite (optional) – if this is selected an application invite will be sent to the tenant. Note: you must enter an email address for this work. For more information see [How tenants apply \(NOT Using HomeSwapper\)](#)

Clicking the “Yes” button will create a new SwapTracker application using these details and add it to the Exchange:



The application is added with a status of “Form incomplete” and a new MX reference number is assigned.

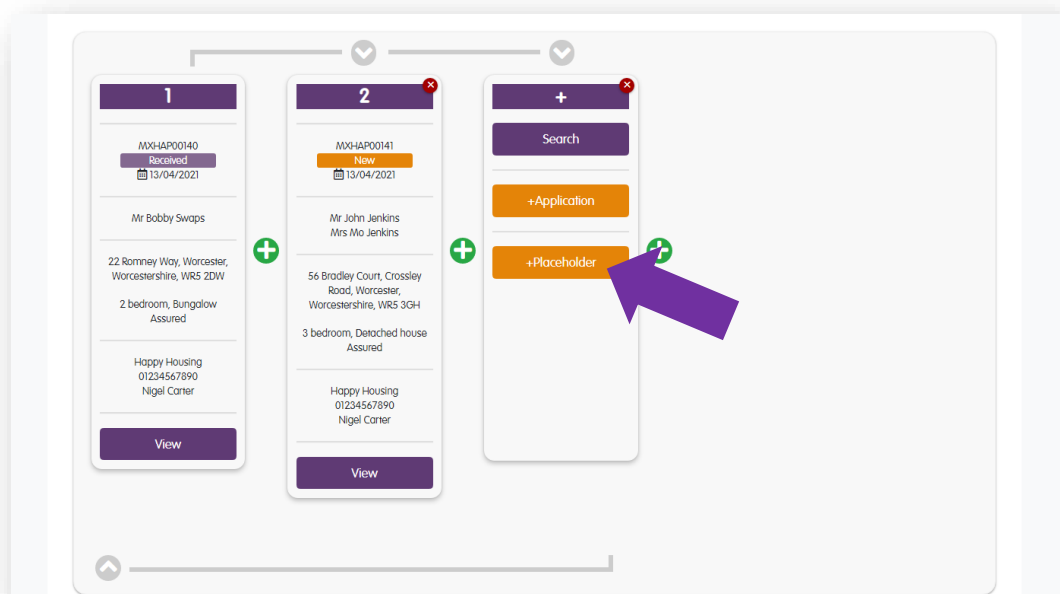
To view details of this new application simply click the “View” button to go the Application Summary page.

Adding a “Placeholder” to the Exchange

There will be some links in the Exchange for which you won’t require a SwapTracker application, e.g. where neither household involved are your tenants nor moving into one of your homes.

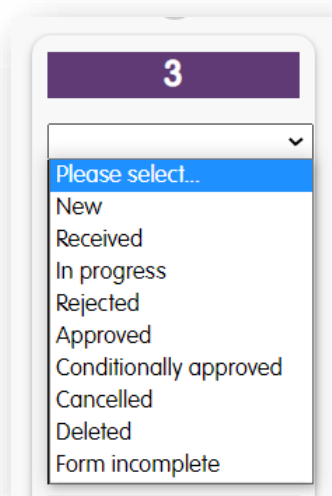
However, so you can still see the whole Exchange in one place, you can add a “placeholder” to represent these links.

Clicking the “+Placeholder” button on a new link allows you to do this:

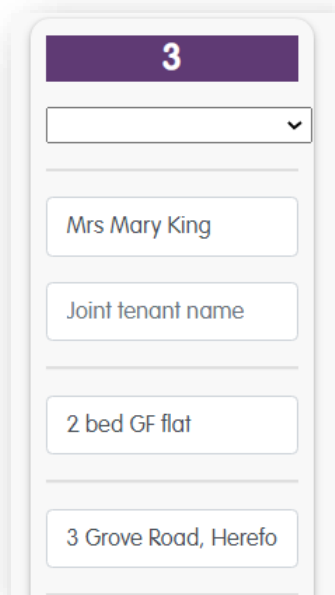


You will then be prompted to enter any information you know about this link in the Exchange.

All this information is optional. Simply fill in as much as you know. You can always add more details later.



- Application status – e.g. New, Received, etc.



3

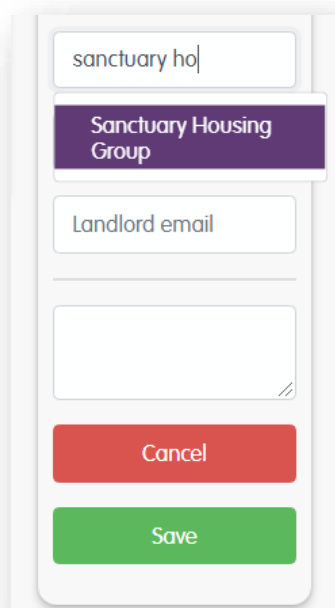
Mrs Mary King

Joint tenant name

2 bed GF flat

3 Grove Road, Herefo

- Main tenant name
- Joint tenant name
- Property description, e.g. 2 bed house, etc
- Property address



sanctuary ho|

Sanctuary Housing Group

Landlord email

Cancel

Save

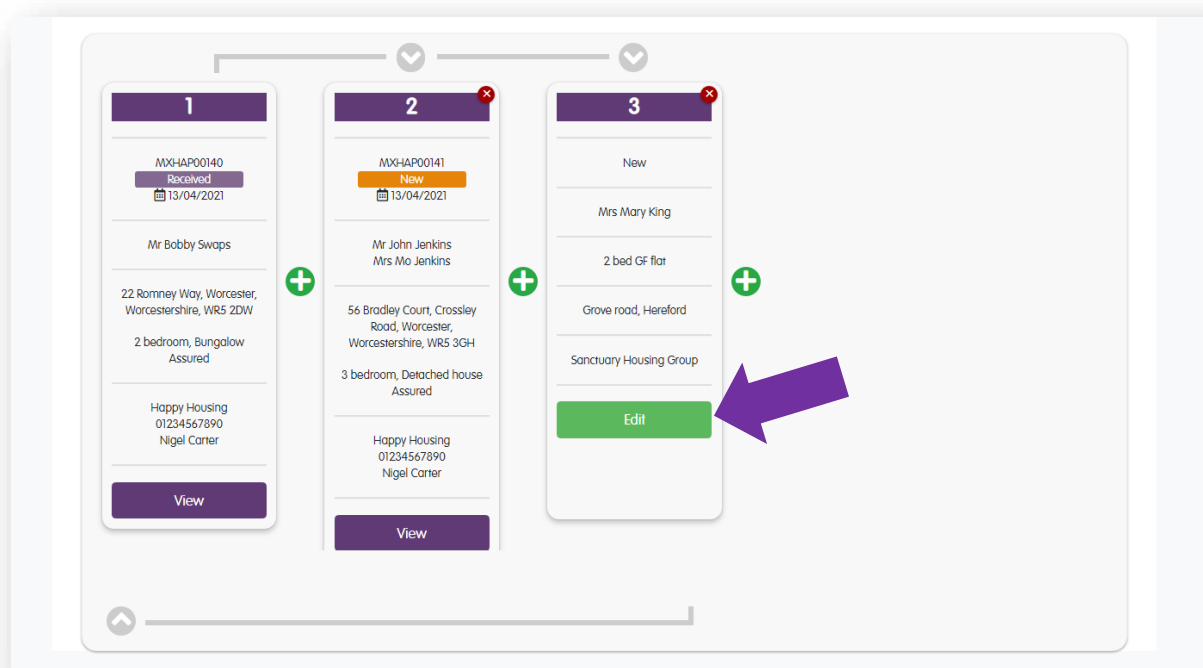
- Landlord name – start typing the name and a list of matching landlords will be shown

- Landlord telephone
- Landlord email

- Text Note – use this to enter any additional information you want to keep regarding this link in the Exchange

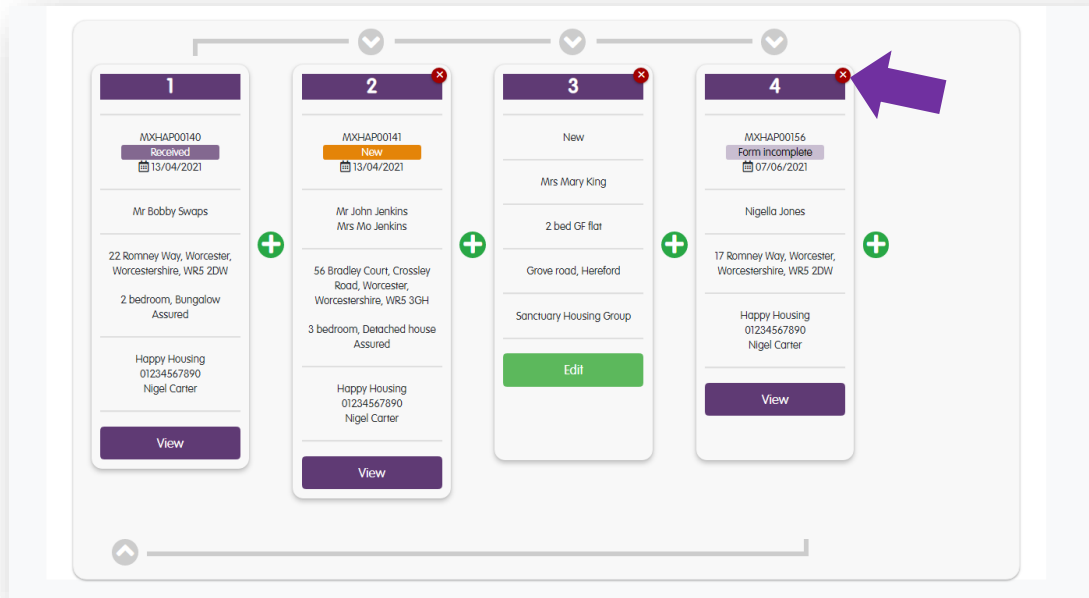
After completing the information you have, click “Save” to create the “Placeholder” and add it to the Exchange.

To change any of these details later, click “Edit” on that link in the Exchange:



Removing links from your Exchange

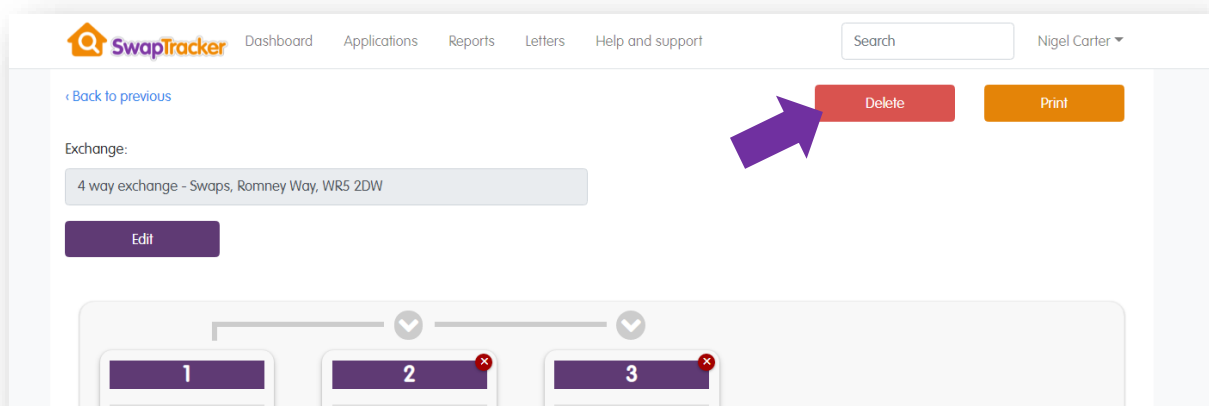
To remove a link from your Exchange, click on the red “x” icon next to the link you want to remove:



Note: Removing a link does not delete the application. It simply takes it out of the Exchange.

Deleting an Exchange

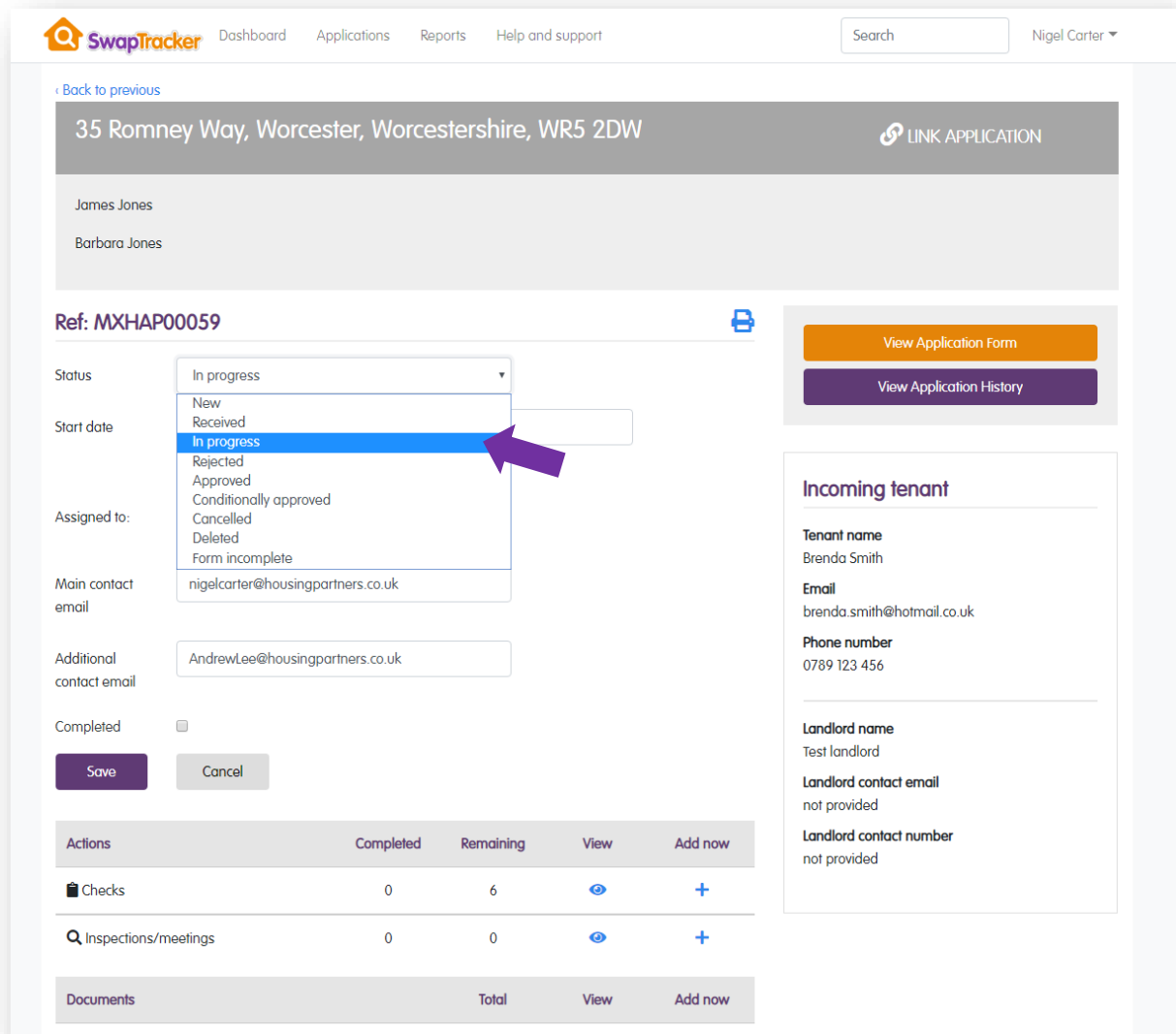
To delete the whole Exchange, click on the “Delete” button at the top right of the page:



Note: Deleting an Exchange does not delete any of the applications.

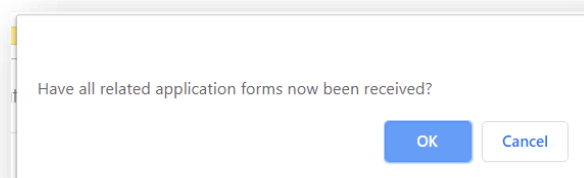
SETTING APPLICATIONS TO “IN PROGRESS” (STARTING THE 42 DAYS)

Setting the application status to “In progress” will notify the tenant that their application is now in progress and advise them of the date by which they can expect a decision.



The screenshot shows the SwapTracker application form for a property at 35 Romney Way, Worcester, Worcestershire, WR5 2DW. The application is for James Jones and Barbara Jones. The reference number is MXHAP00059. The status is set to 'In progress', which is highlighted in blue in the dropdown menu. A purple arrow points to the 'In progress' option. The form includes fields for start date, assigned to, main contact email, and additional contact email. There are buttons for 'View Application Form' and 'View Application History'. A table at the bottom shows the status of various actions: Checks (0 completed, 6 remaining) and Inspections/meetings (0 completed, 0 remaining). A warning dialog box is shown at the bottom of the form, asking 'Have all related application forms now been received?' with 'OK' and 'Cancel' buttons.

When selecting “In Progress” from the Status list a warning is shown:

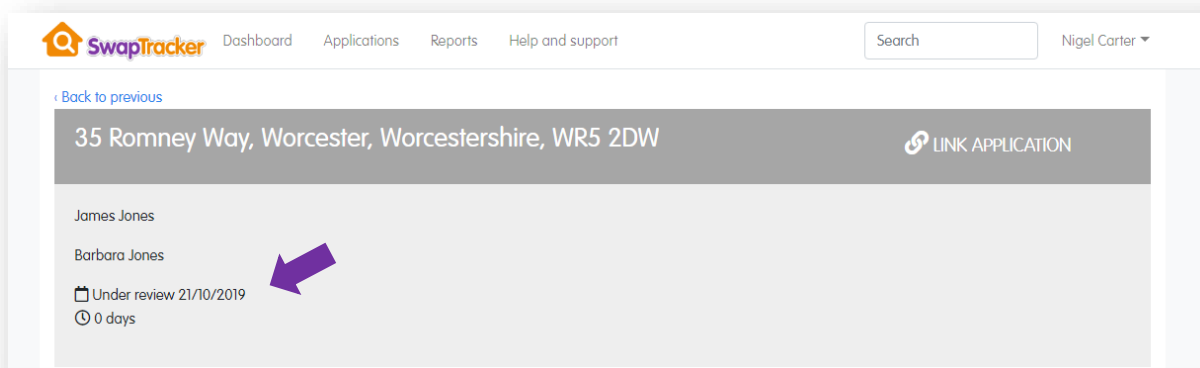


The warning dialog box contains the text: 'Have all related application forms now been received?'. It has two buttons: 'OK' and 'Cancel'.

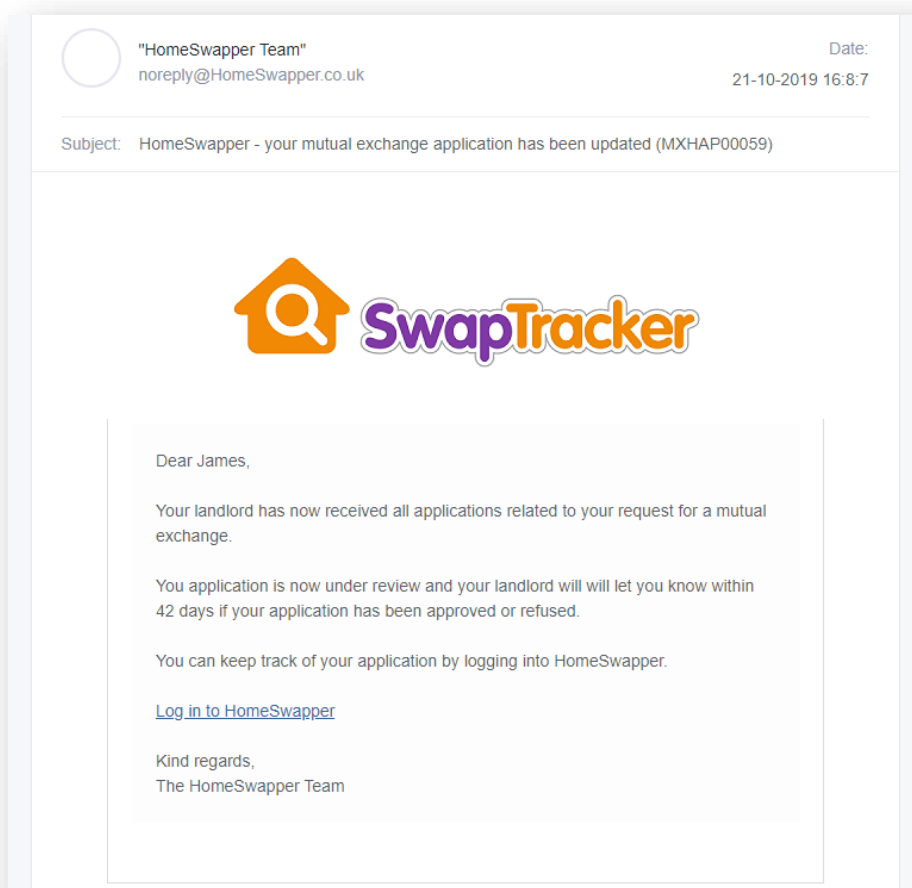
Click “OK” to proceed or “Cancel” if you are not ready for the application to be regarded as “In Progress” and the 42 days to begin.

You must click “Save” for these changes to take effect.

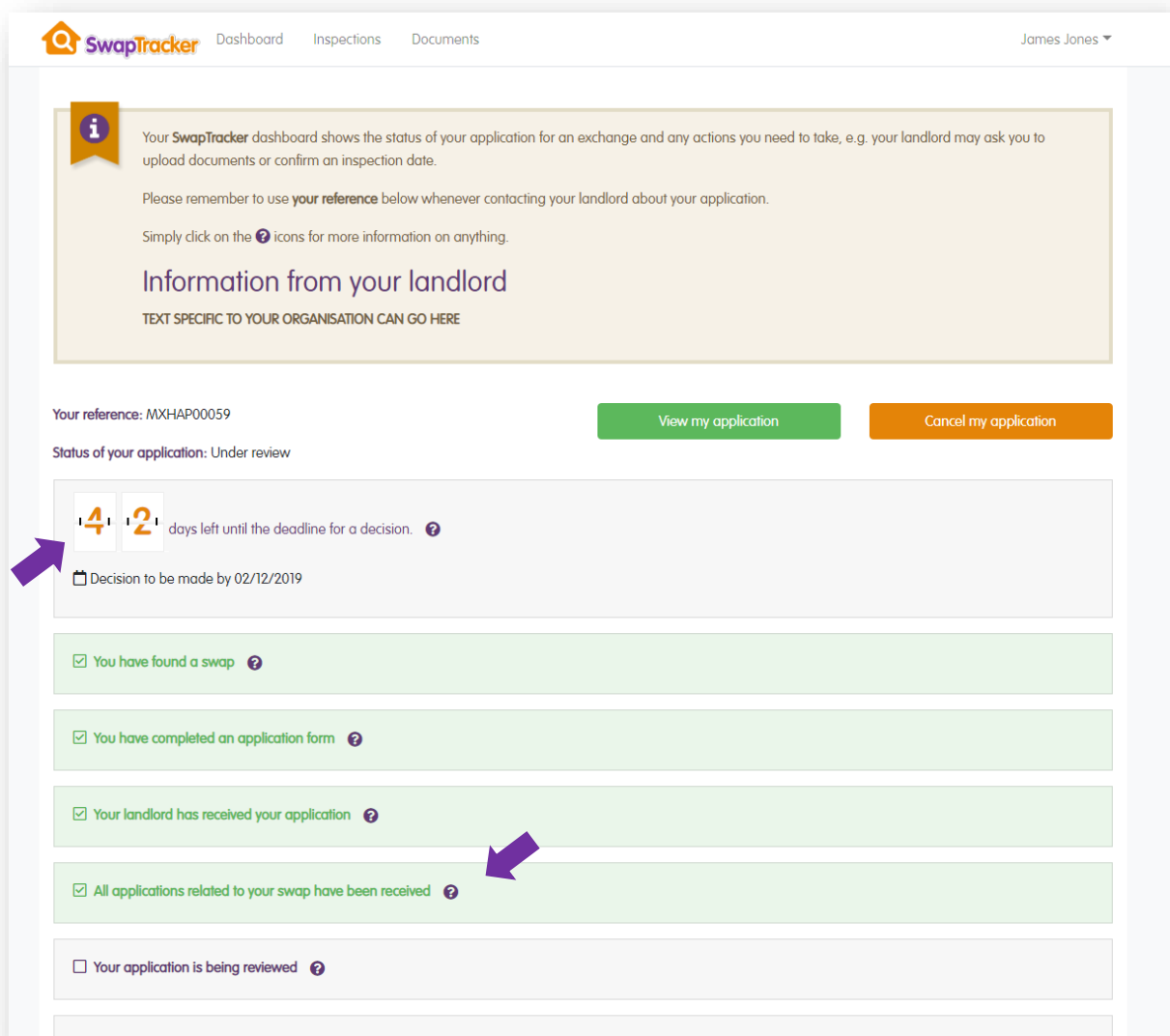
The Application Summary now shows the date the application went under review (i.e. the 42 days starts) and how many days have passed since then:



The tenant is sent an email notification informing them the status of their application has changed:



When they log into SwapTracker they can then see the status of their application has changed and are shown a 42-day countdown clock showing then they should receive a decision by:



The screenshot shows the SwapTracker dashboard for a user named James Jones. The dashboard includes a navigation bar with links to Dashboard, Inspections, and Documents. A prominent information box at the top explains the dashboard's purpose and provides instructions on using the reference number and help icons. Below this, the user's reference number (MXHAP00059) is displayed, along with buttons to 'View my application' and 'Cancel my application'. The application status is 'Under review'. A large countdown clock shows '42' days left until the deadline for a decision, with a purple arrow pointing to the '4' and another pointing to the '2'. Below the clock, a list of tasks is shown, with the first four tasks marked as completed (checked boxes) and the last one as pending (unchecked box). The tasks are: 'You have found a swap', 'You have completed an application form', 'Your landlord has received your application', 'All applications related to your swap have been received', and 'Your application is being reviewed'. A purple arrow points to the fourth task, 'All applications related to your swap have been received'.

SwapTracker Dashboard Inspections Documents James Jones ▾

i Your **SwapTracker** dashboard shows the status of your application for an exchange and any actions you need to take, e.g. your landlord may ask you to upload documents or confirm an inspection date.

Please remember to use **your reference** below whenever contacting your landlord about your application.

Simply click on the **?** icons for more information on anything.

Information from your landlord

TEXT SPECIFIC TO YOUR ORGANISATION CAN GO HERE

Your reference: MXHAP00059 View my application Cancel my application

Status of your application: Under review

42 days left until the deadline for a decision. **?**

📅 Decision to be made by 02/12/2019







- ☒ You have found a swap **?**
- ☒ You have completed an application form **?**
- ☒ Your landlord has received your application **?**
- ☒ All applications related to your swap have been received **?**
- ☐ Your application is being reviewed **?**
- ☐ Inspections/Meetings are arranged **?**

DOCUMENTS

Documents can be uploaded and stored securely against an application.

These can either be uploaded by you or a request sent to the tenant for them to upload the document themselves via SwapTracker.

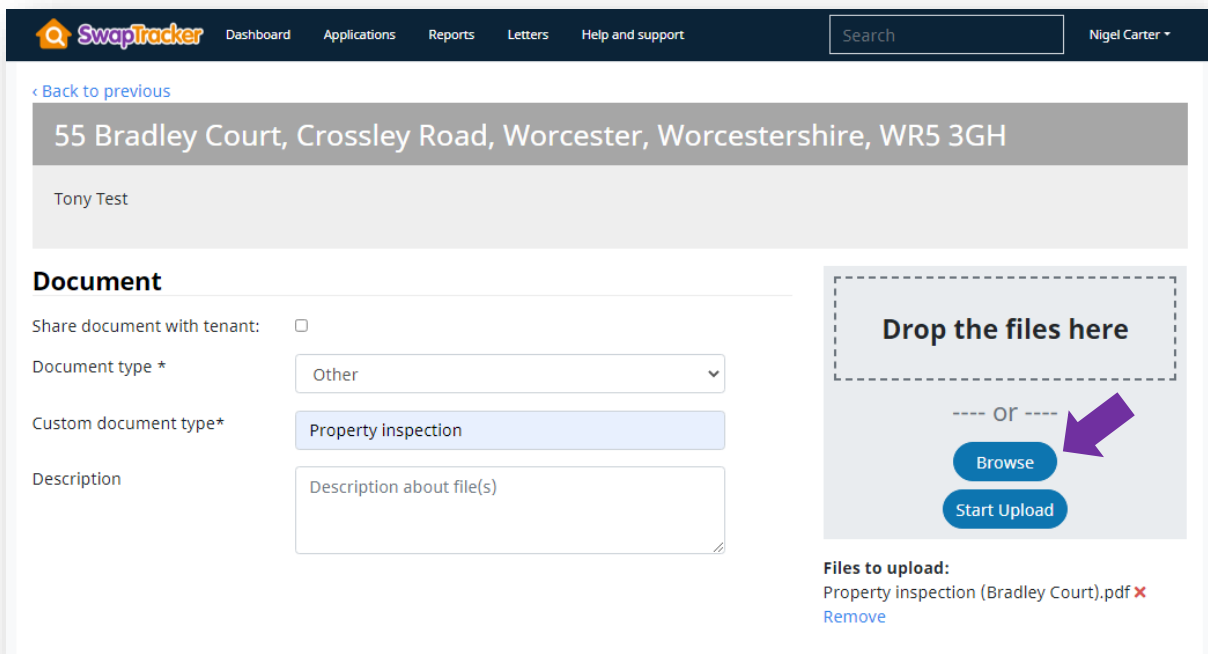
Documents can be uploaded/requested from the “*Documents*” section of the Application Summary.

Documents	Total	View	Add now
 Documents received	0		+
 Documents requested	1		+
 Letters	0		+

Document uploads (“Documents received”)

To upload a document on behalf of the tenant, first select the type of document from the list and enter any additional information in the Description box (this is optional).

To add the files, you can either “drag and drop” them into the “*Drop the files here*” box or browse to them on your PC/device by clicking the “*Browse*” button.



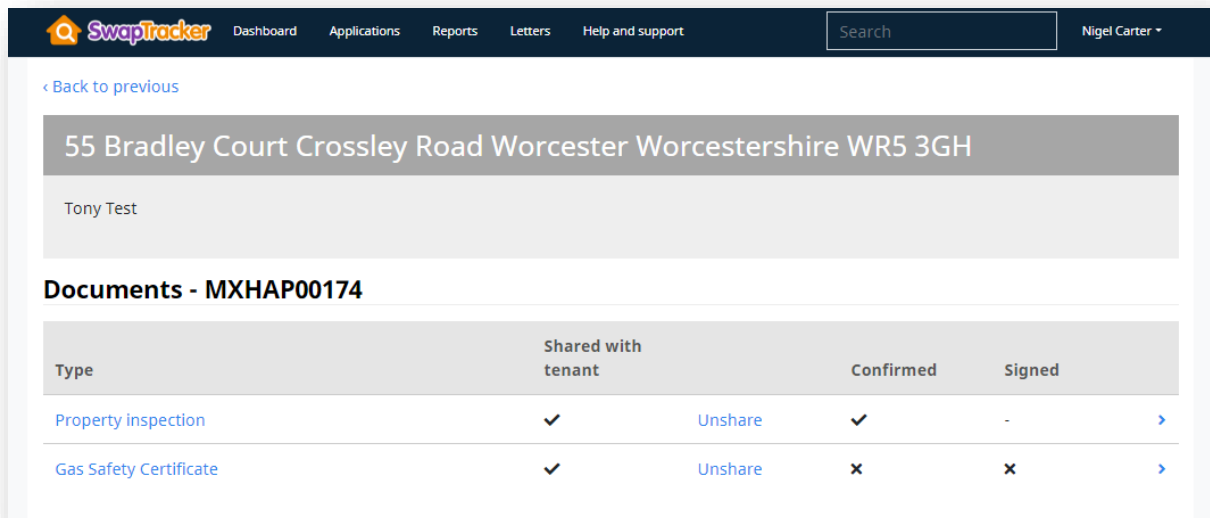
The screenshot shows the SwapTracker application interface for uploading a document. The top navigation bar includes links for Dashboard, Applications, Reports, Letters, and Help and support, along with a search bar and the user's name, Nigel Carter. The main content area displays the address "55 Bradley Court, Crossley Road, Worcester, Worcestershire, WR5 3GH" and the name "Tony Test". Below this, the "Document" section contains a form with the following fields:

- Share document with tenant:** A checkbox that is currently unchecked.
- Document type *:** A dropdown menu with "Other" selected.
- Custom document type*:** A text input field containing "Property inspection".
- Description:** A text input field containing "Description about file(s)".

To the right of the form is a large dashed box labeled "Drop the files here". Below this box, there is a link "or" and two buttons: "Browse" and "Start Upload". A purple arrow points to the "Browse" button. At the bottom right, there is a section titled "Files to upload:" which lists "Property inspection (Bradley Court).pdf" with a red 'x' icon and a "Remove" link.

You may upload more than one file if required. Clicking “*Start Upload*” will upload the files to the SwapTracker server and store them against the application.

The Documents list shows all documents uploaded for an application.



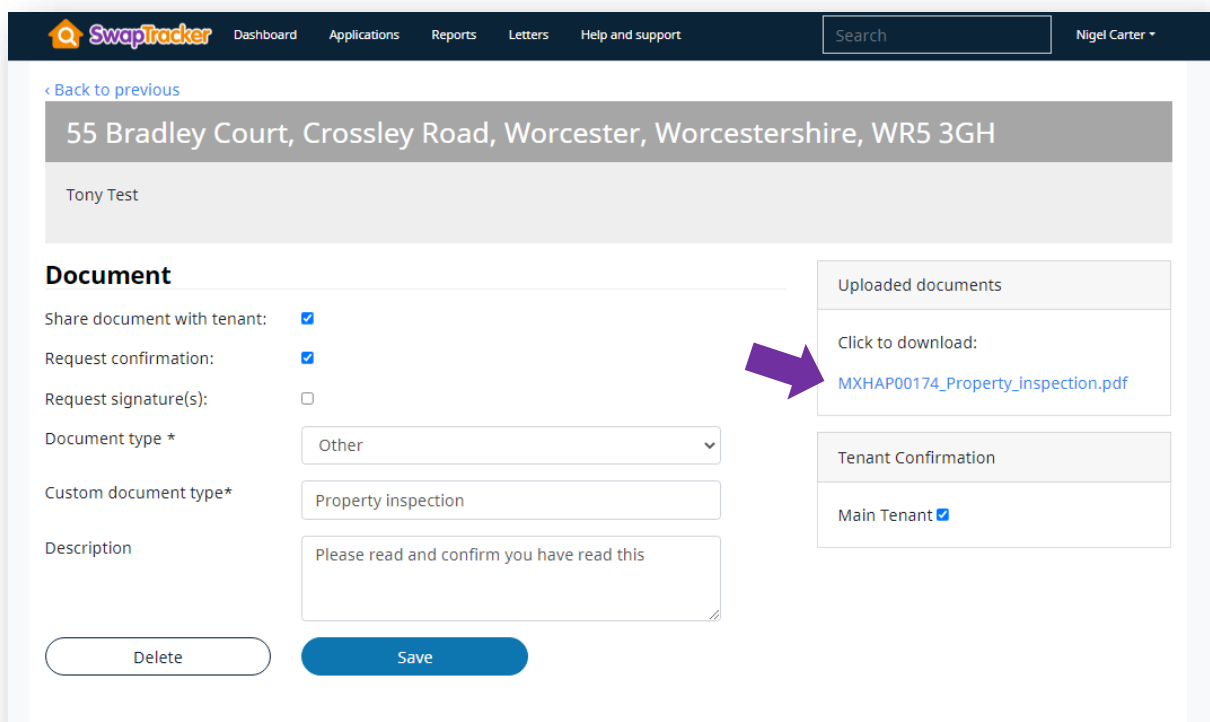
55 Bradley Court Crossley Road Worcester Worcestershire WR5 3GH

Tony Test

Documents - MXHAP00174

Type	Shared with tenant	Confirmed	Signed
Property inspection	✓ Unshare	✓	-
Gas Safety Certificate	✓ Unshare	✗	✗

To view previously uploaded documents simply click on the file name to download the file.



55 Bradley Court, Crossley Road, Worcester, Worcestershire, WR5 3GH

Tony Test

Document

Share document with tenant: ☒

Request confirmation: ☒

Request signature(s): ☐

Document type *: Other

Custom document type*: Property inspection

Description: Please read and confirm you have read this

[Delete](#) [Save](#)

Uploaded documents

Click to download:

[MXHAP00174_Property_inspection.pdf](#)

Tenant Confirmation

Main Tenant ☒

Please note: after a document has been uploaded it cannot be changed. However, you can update the Description.

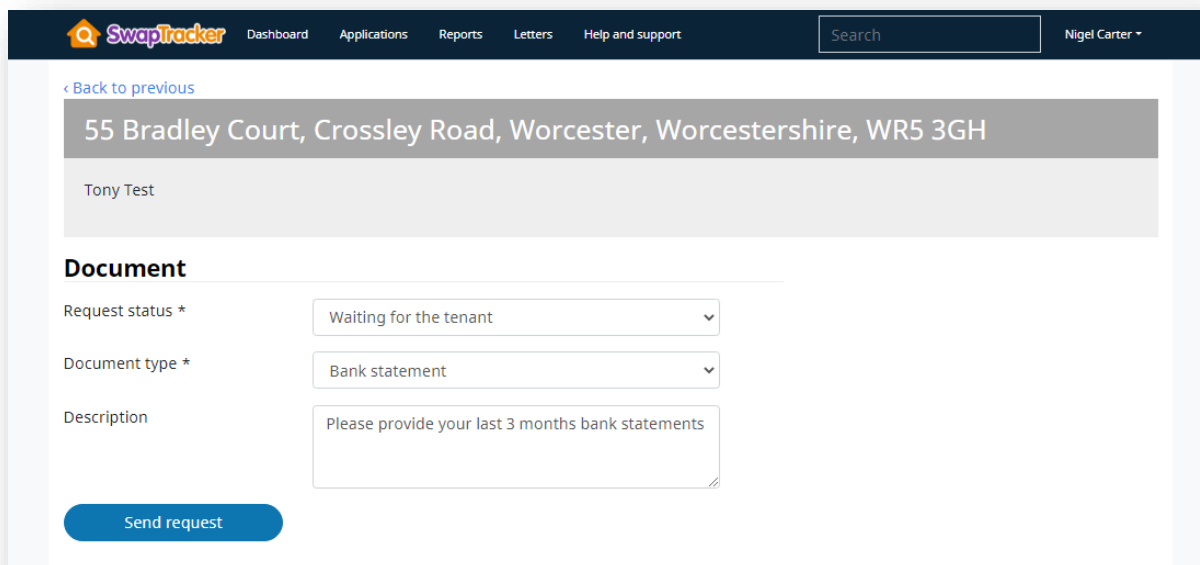
If you must change a document, you will need to delete the original and create/upload a new one.

Document requests

Sending a request to the tenant

To request document(s) from the tenant, select the type of document you require from the list and add any supporting information in the Description box.

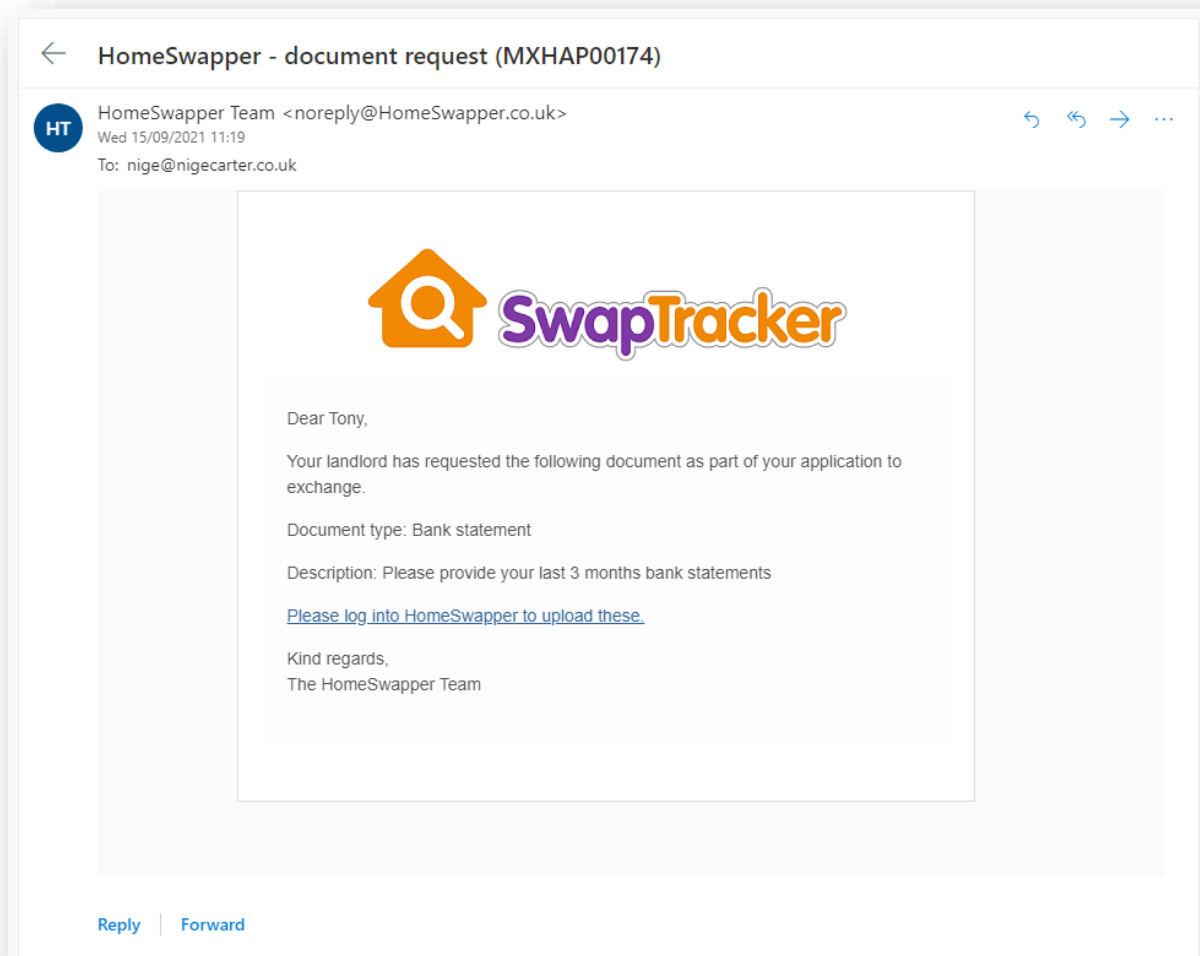
If you require a type of document not in list, select “*Other*” and enter the type you need in the box provided.



The screenshot shows the SwapTracker web interface. At the top is a dark navigation bar with the SwapTracker logo, menu items (Dashboard, Applications, Reports, Letters, Help and support), a search bar, and a user profile (Nigel Carter). Below the navigation bar, there's a breadcrumb link '< Back to previous'. The main content area has a grey header bar with the address '55 Bradley Court, Crossley Road, Worcester, Worcestershire, WR5 3GH' and a sub-header with the name 'Tony Test'. Below this is a section titled 'Document'. It contains three form fields: 'Request status *' with a dropdown menu showing 'Waiting for the tenant', 'Document type *' with a dropdown menu showing 'Bank statement', and 'Description' with a text area containing 'Please provide your last 3 months bank statements'. At the bottom of this section is a blue button labeled 'Send request'.

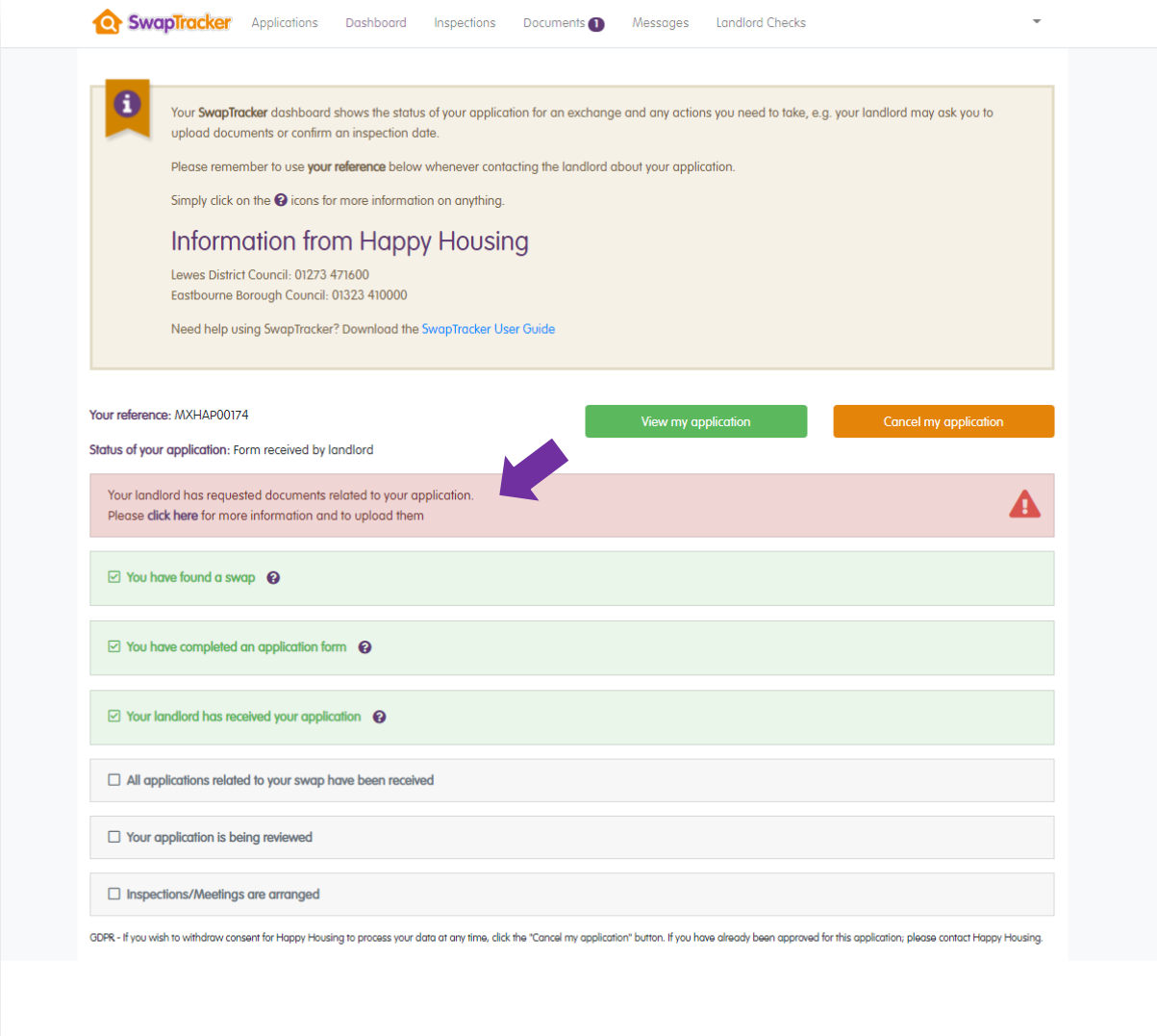
Clicking “*Send request*” will email the tenant and add a notification to their SwapTracker dashboard.

At this stage, the status of the request is “*Waiting for the tenant*”.



How the tenant responds

When the tenant logs into SwapTracker, they are prompted to supply the document(s) you have requested.



The screenshot shows the SwapTracker tenant dashboard. At the top is a navigation bar with links: Applications, Dashboard, Inspections, Documents (with a notification icon), Messages, and Landlord Checks. Below the navigation bar is a large information box from 'Happy Housing' containing contact details for Lewes District Council and Eastbourne Borough Council, and a link to the SwapTracker User Guide. Below this box, the user's reference 'MXHAP00174' is displayed next to 'View my application' and 'Cancel my application' buttons. The status of the application is 'Form received by landlord'. A red alert box states: 'Your landlord has requested documents related to your application. Please click here for more information and to upload them'. A purple arrow points to this alert box. Below the alert box are several green and grey status boxes with checkboxes and question marks: 'You have found a swap', 'You have completed an application form', 'Your landlord has received your application', 'All applications related to your swap have been received', 'Your application is being reviewed', and 'Inspections/Meetings are arranged'. At the bottom, a GDPR notice is visible.

SwapTracker Applications Dashboard Inspections Documents 1 Messages Landlord Checks

Information from Happy Housing
 Lewes District Council: 01273 471600
 Eastbourne Borough Council: 01323 410000
 Need help using SwapTracker? Download the [SwapTracker User Guide](#)

Your reference: MXHAP00174 View my application Cancel my application

Status of your application: Form received by landlord

Your landlord has requested documents related to your application.
 Please [click here](#) for more information and to upload them

☒ You have found a swap ?

☒ You have completed an application form ?

☒ Your landlord has received your application ?

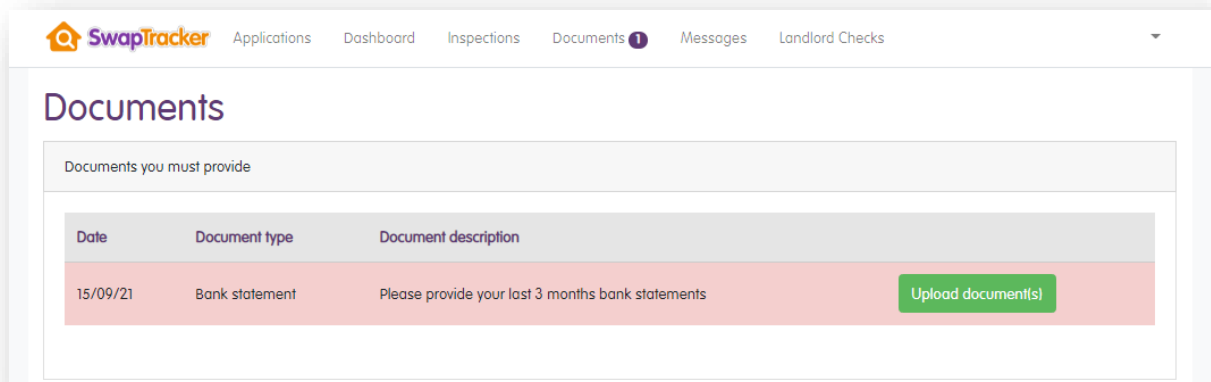
☐ All applications related to your swap have been received

☐ Your application is being reviewed

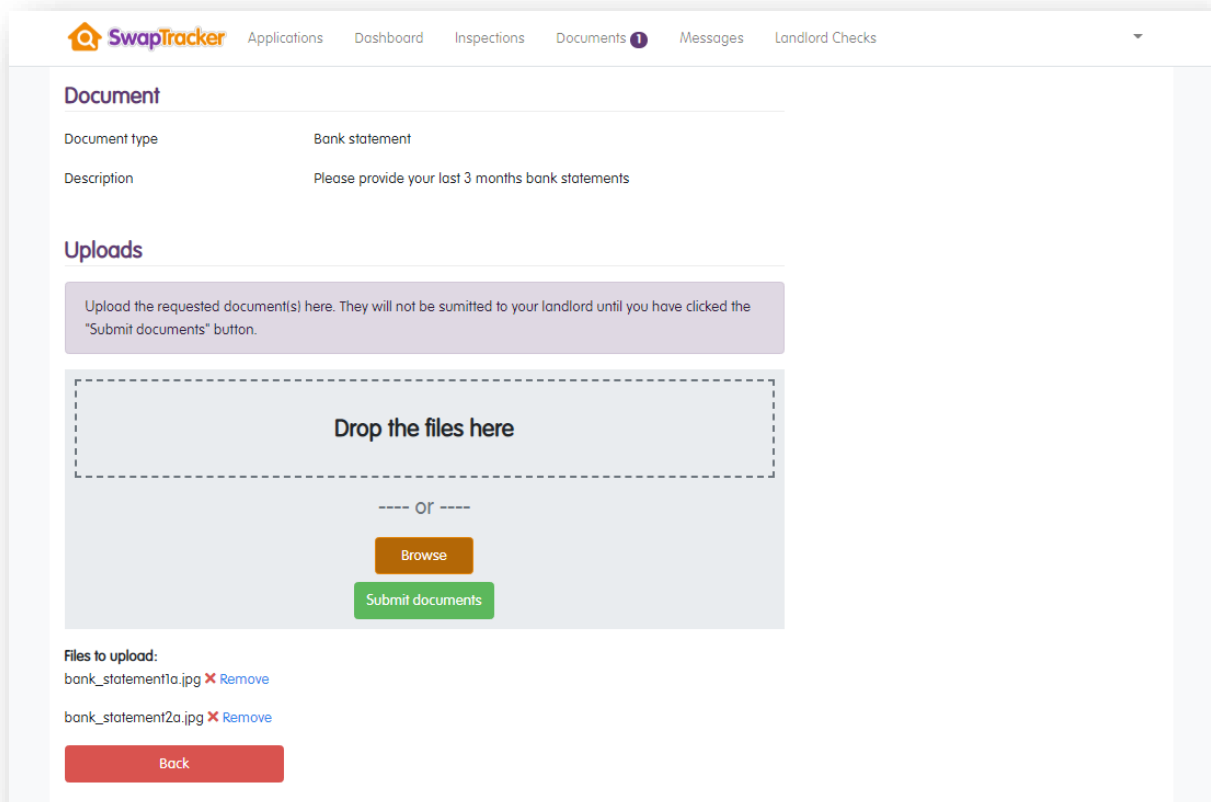
☐ Inspections/Meetings are arranged

GDPR - If you wish to withdraw consent for Happy Housing to process your data at any time, click the "Cancel my application" button. If you have already been approved for this application, please contact Happy Housing.

Clicking the prompt shows them details of the document(s) they need to provide:



When they click the “*Upload document(s)*” button they are taken to a page where they can upload the files.



This has a simple tool for dragging and dropping files from the laptop/desktop computer or they can take photos when using a mobile device (phone or tablet).

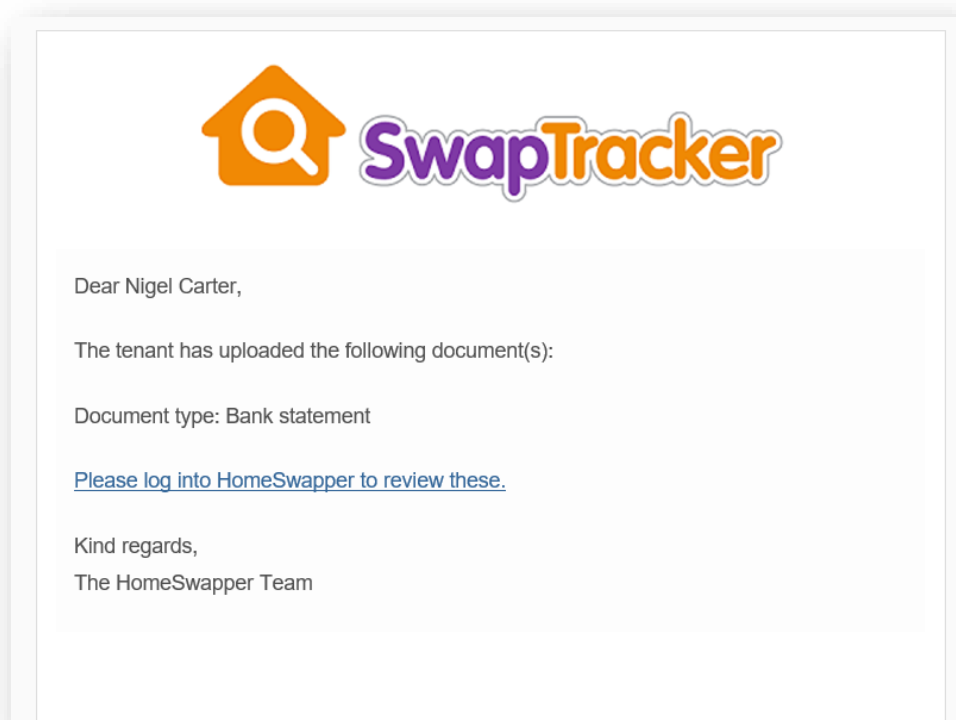
When they have added all the documents required, they click on “*Submit documents*” to submit them to you.

The document request then moves from their “*Documents you must provide*” list to their “*Documents being checked by the landlord*” list:

Documents you must provide		
Date	Document type	Document description
You have no pending required documents		

Documents being checked by the landlord		
Date	Document type	Document description
15/09/21	Bank statement	Please provide your last 3 months bank statements
		View

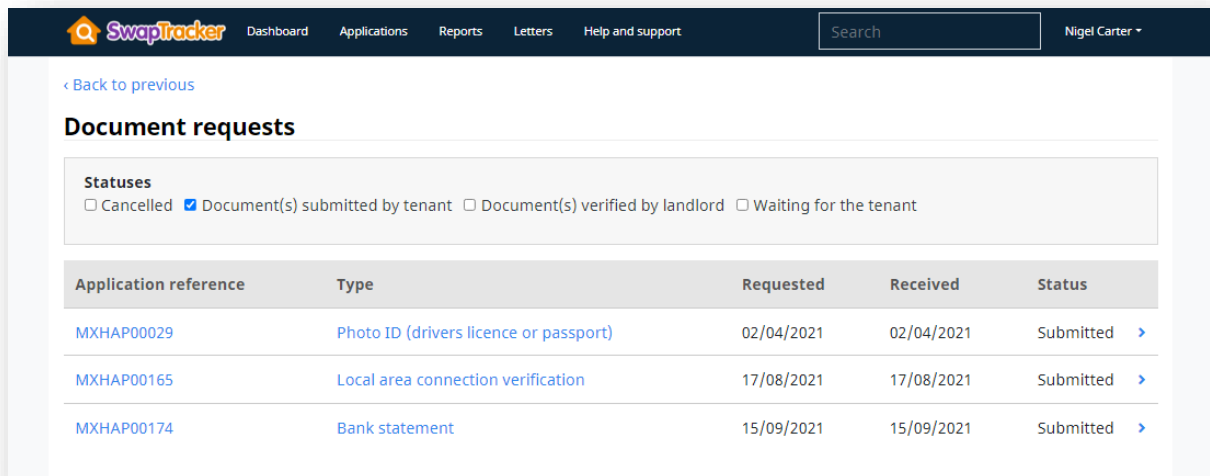
An email notification will be sent to the contact address(es) for the application:



Reviewing tenant documents

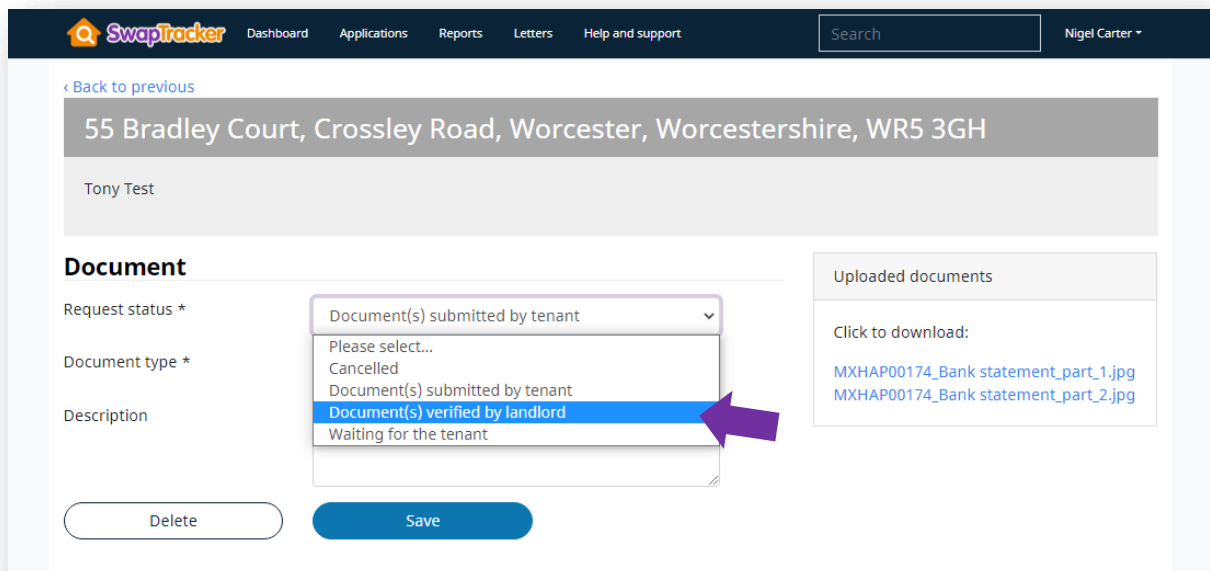
When new documents have been uploaded by the tenant, these should be reviewed to check they are suitable and correct.

Clicking on the “*received requests*” total on the “*Document requests*” section of your SwapTracker dashboard takes you to the full list of document requests that have been received from tenants:



Application reference	Type	Requested	Received	Status
MXHAP00029	Photo ID (drivers licence or passport)	02/04/2021	02/04/2021	Submitted
MXHAP00165	Local area connection verification	17/08/2021	17/08/2021	Submitted
MXHAP00174	Bank statement	15/09/2021	15/09/2021	Submitted

When you have reviewed the document(s) and are happy with them, set the status of the request to “*Documents verified by landlord*” and click “*Save*”.

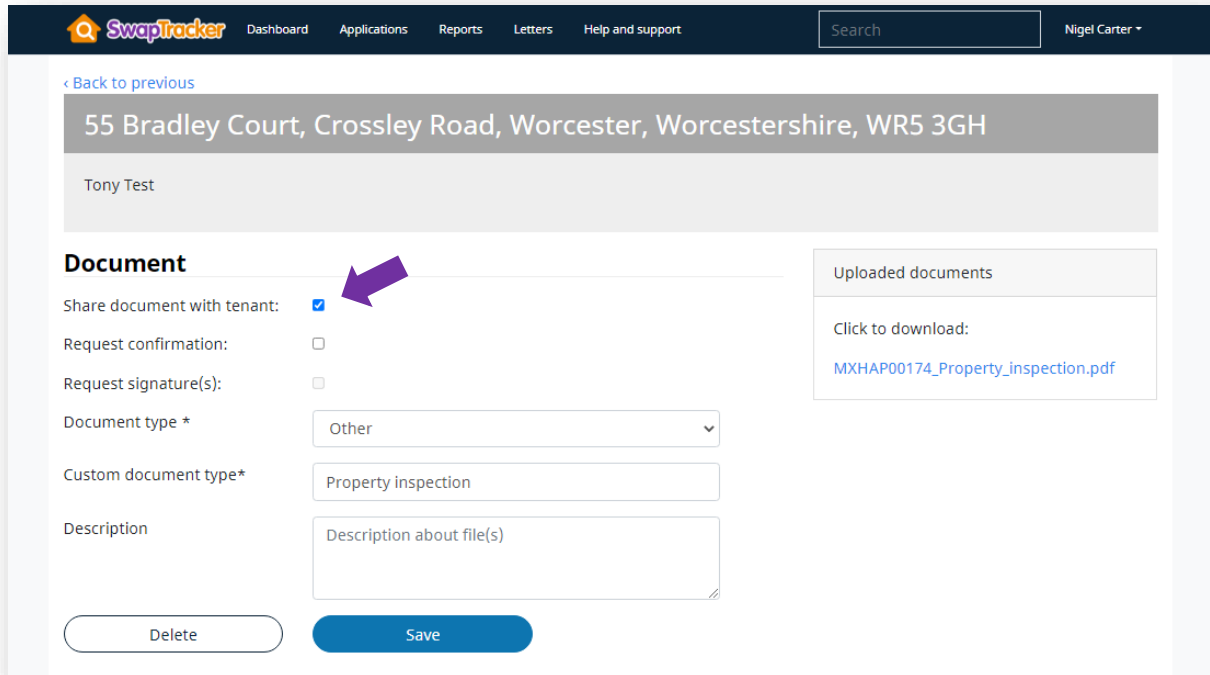


If there are any issues with the documents provided by the tenant, either set the status to “*Waiting for tenant*” again or cancel/delete the request and create a new request instead.

Sharing documents with tenants

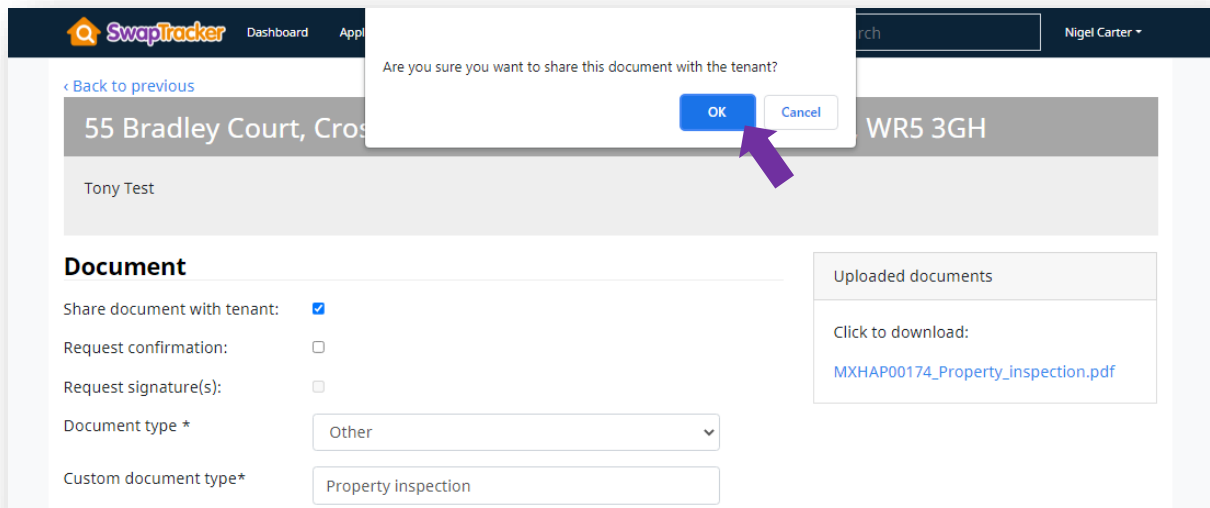
If you want to provide more transparency and keep the tenant up to date, you can also choose to “share” the documents you upload against their application.

To share a document with a tenant simply tick the “Share document with tenant” box:



The screenshot shows the SwapTracker interface with the 'Document' form for application 'Tony Test' at '55 Bradley Court, Crossley Road, Worcester, Worcestershire, WR5 3GH'. The 'Share document with tenant' checkbox is checked, indicated by a purple arrow. Other fields include 'Request confirmation' (unchecked), 'Request signature(s)' (unchecked), 'Document type' (Other), 'Custom document type*' (Property inspection), and 'Description' (Description about file(s)). A 'Save' button is visible at the bottom right of the form. To the right, an 'Uploaded documents' section shows a link to download 'MXHAP00174_Property_inspection.pdf'.

When you click “Save” you will then be asked to confirm you wish to share it:

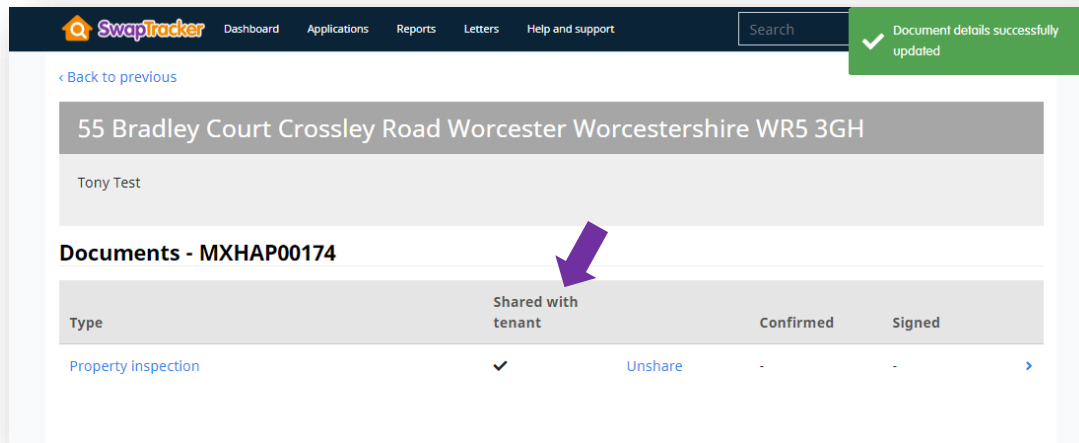


This screenshot shows the same 'Document' form as above, but with a confirmation dialog box overlaid. The dialog asks 'Are you sure you want to share this document with the tenant?' and has 'OK' and 'Cancel' buttons. A purple arrow points to the 'OK' button. The background form shows the 'Share document with tenant' checkbox is still checked.

Sharing documents allows the tenant to see them on their SwapTracker.

Note: by default, documents are NOT shared with tenants. However, they can still see any documents they themselves have uploaded that you requested.

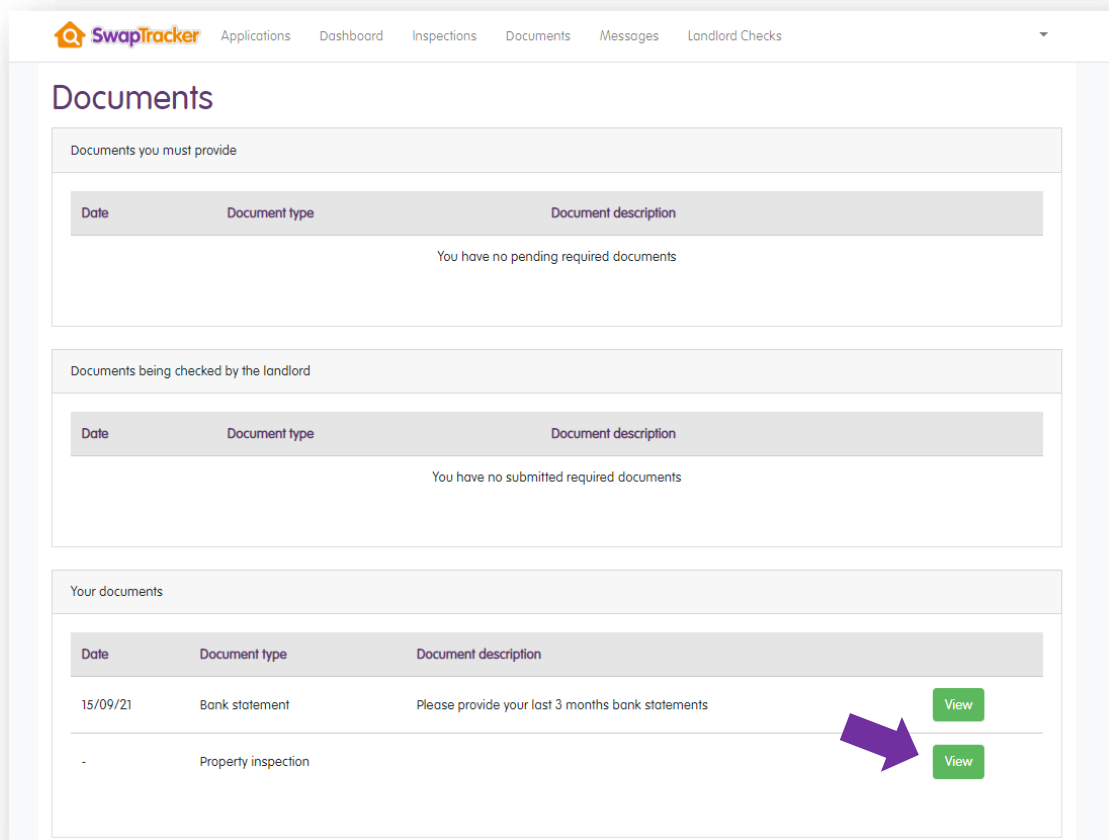
On the list of documents for an application you can see which are shared and which are not. A tick indicates the tenant will be able to see this document.



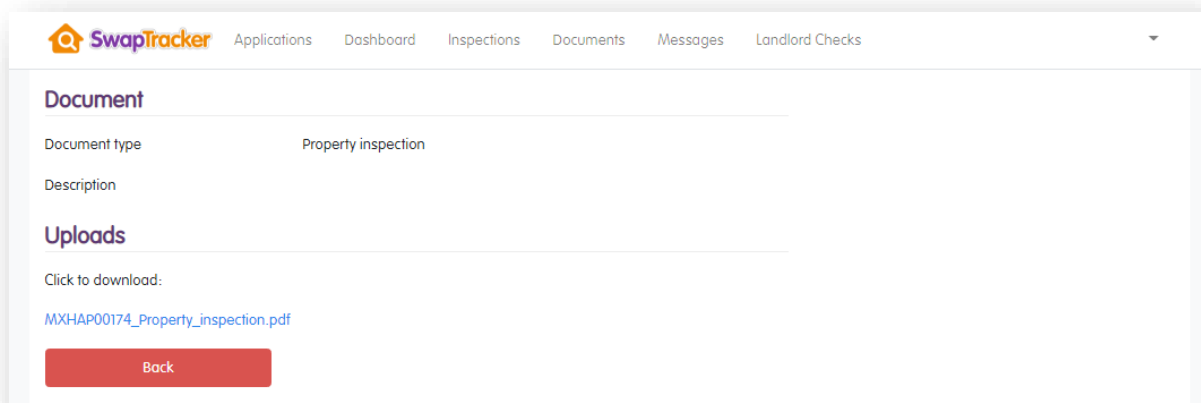
The screenshot shows the SwapTracker interface for an application. At the top, there's a navigation bar with links to Dashboard, Applications, Reports, Letters, and Help and support. A search bar is also present. A green notification banner at the top right states "Document details successfully updated". Below the navigation bar, the application details are shown, including the address "55 Bradley Court Crossley Road Worcester Worcestershire WR5 3GH" and the name "Tony Test". The "Documents - MXHAP00174" section is highlighted. It contains a table with columns: Type, Shared with tenant, Confirmed, and Signed. The first row shows a "Property inspection" document. The "Shared with tenant" column has a checkmark, and the "Confirmed" and "Signed" columns have dashes. A purple arrow points to the checkmark in the "Shared with tenant" column. Below the table, there are links for "Unshare" and a right arrow.

When you share a document, the tenant receives an email notifying them of this.

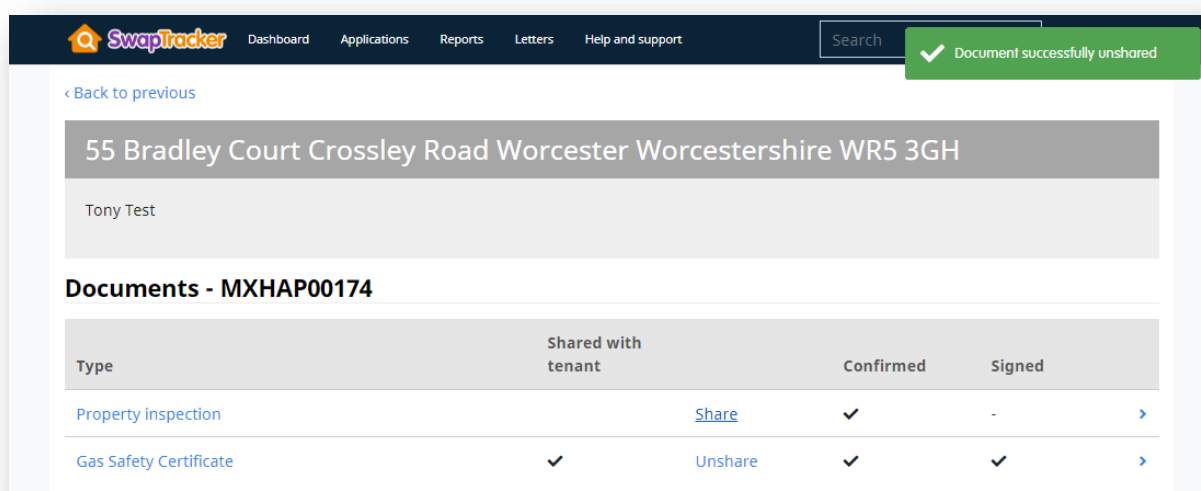
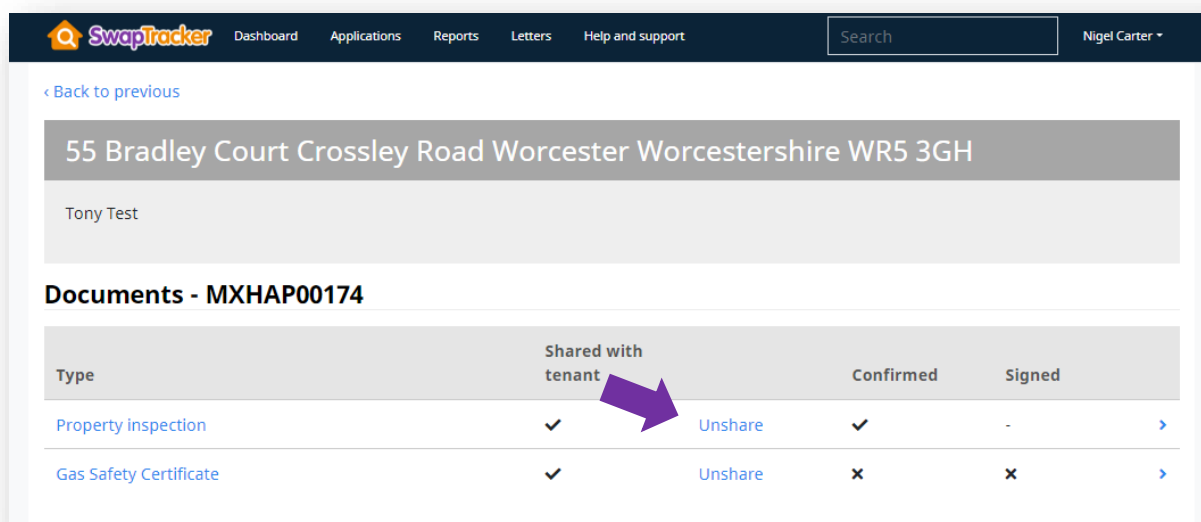
When they log into SwapTracker, they can then see details of their documents in the "Documents" section:



The screenshot shows the SwapTracker interface for the "Documents" section. The navigation bar includes links to Applications, Dashboard, Inspections, Documents, Messages, and Landlord Checks. The "Documents" section is active. It contains three main sections: "Documents you must provide", "Documents being checked by the landlord", and "Your documents". Each section has a table with columns: Date, Document type, and Document description. The "Your documents" section shows two documents: a "Bank statement" dated 15/09/21 and a "Property inspection" dated -. Both documents have a "View" button next to them. A purple arrow points to the "View" button for the "Property inspection" document.



If you need to un-share a document, simply click the “*Unshare*” link next to it.



The document will then be hidden from the tenant's SwapTracker.

As with un-sharing, you can also share an existing document, by clicking the "Share" link next to it. Again, the tenant is emailed and will be able to see that document in their SwapTracker.

Note: all documents that are shared can be seen by the tenant in their "Documents" section.

For this reason, you should always be careful not share any documents that you would not want the tenant to see!

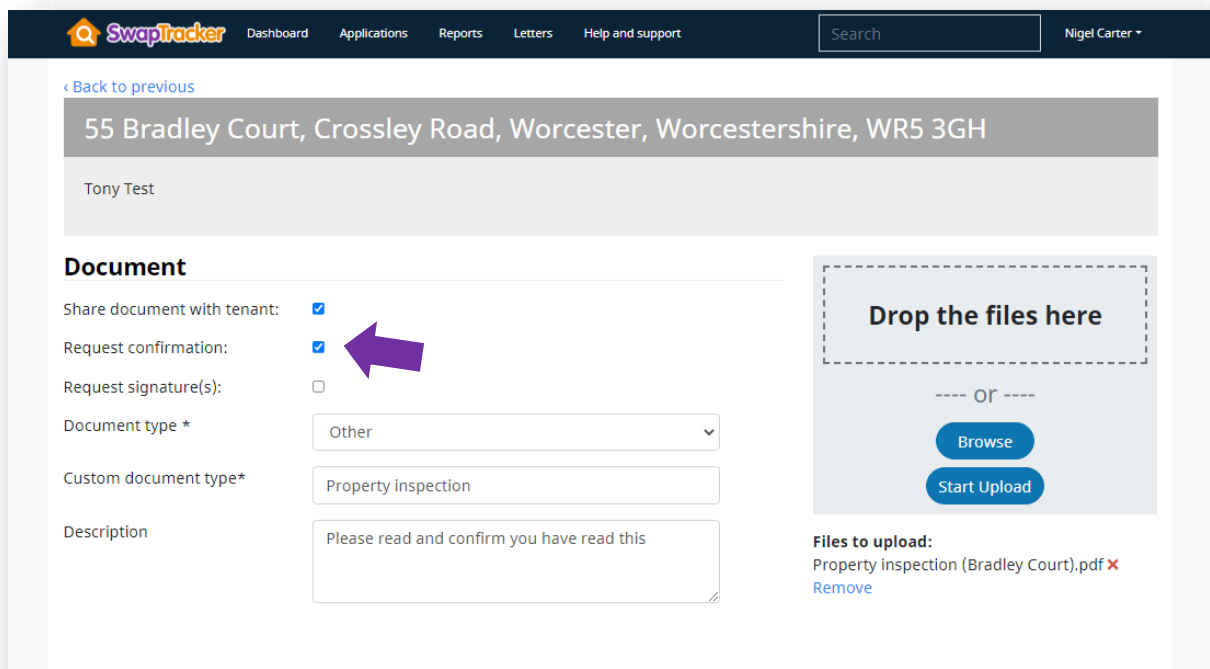
Requesting confirmation/signature from the tenant

When sharing a document with a tenant, you can also ask them to confirm they have received/read the document. You can also request they sign this confirmation too.

Requesting confirmation

Clicking the "Share document with tenant" box gives you two additional options – "Request confirmation" and "Request signature".

To simply ask the tenant to confirm they have received the document tick the "Request confirmation" box:




The screenshot shows the SwapTracker interface for sharing a document. The top navigation bar includes links for Dashboard, Applications, Reports, Letters, and Help and support, along with a search bar and the user name Nigel Carter. The main content area shows the document title "55 Bradley Court, Crossley Road, Worcester, Worcestershire, WR5 3GH" and the tenant name "Tony Test". Under the "Document" section, there are three checkboxes: "Share document with tenant" (checked), "Request confirmation" (checked, with a purple arrow pointing to it), and "Request signature(s)" (unchecked). Below these are input fields for "Document type *" (set to "Other") and "Custom document type*" (set to "Property inspection"). The "Description" field contains the text "Please read and confirm you have read this". To the right, there is a "Drop the files here" area with "Browse" and "Start Upload" buttons. Below this, the "Files to upload:" section shows a file named "Property inspection (Bradley Court).pdf" with a "Remove" link.

When the document is saved the tenant is emailed to inform them the document is available to view and they need to confirm they have received it.

When they log into their SwapTracker, any documents requiring confirmation are highlighted as below:

Your documents			
Date	Document type	Document description	
15/09/21	Bank statement	Please provide your last 3 months bank statements	View
-	Property inspection	Please read and confirm you have read this ⚠ Happy Housing has requested confirmation you have received this document.	View

After viewing the document, the tenant must then tick the box to say they have read and understood it.


[Applications](#)
[Dashboard](#)
[Inspections](#)
[Documents](#)
[Messages](#)
[Landlord Checks](#)

Document

Document type	Property inspection
Description	Please read and confirm you have read this

Uploads

Click to download:

[MXHAP00174_Property_inspection.pdf](#)

Document Confirmation

Please confirm that you have received this document

Main Tenant*

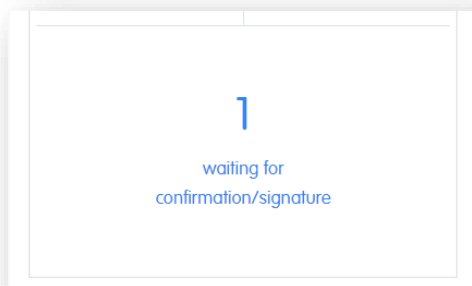
☒ I confirm that I have read and understood this document

[Confirm](#)
[Back](#)

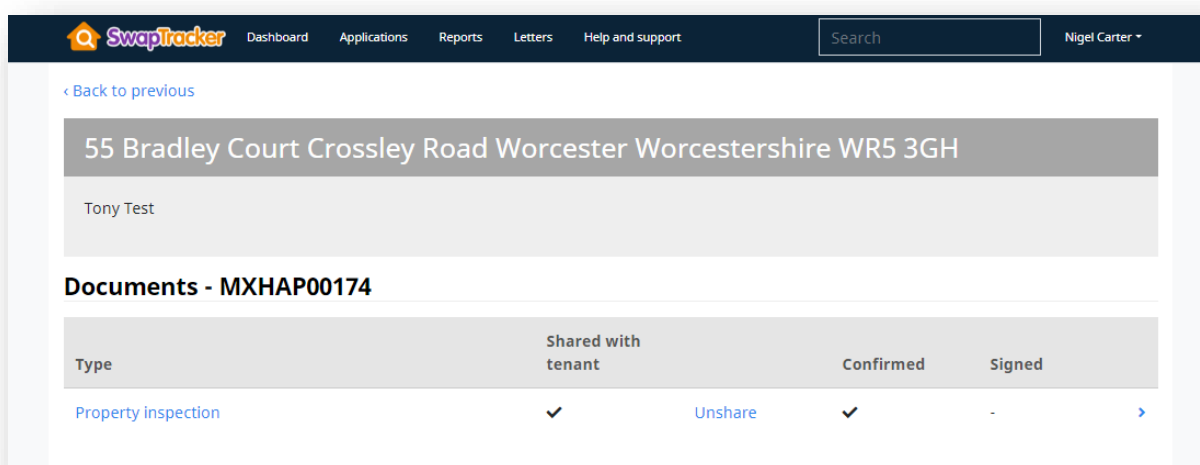
If there is a joint applicant, boxes for both main and joint applicants must be ticked.

When they click confirm, you will receive an email notifying you this has happened.

You can keep track of any documents you are waiting to be confirmed using the “*waiting for confirmation/signature*” workflow in the “*Document requests*” section on your dashboard.



Clicking the total number takes you to the list of documents:



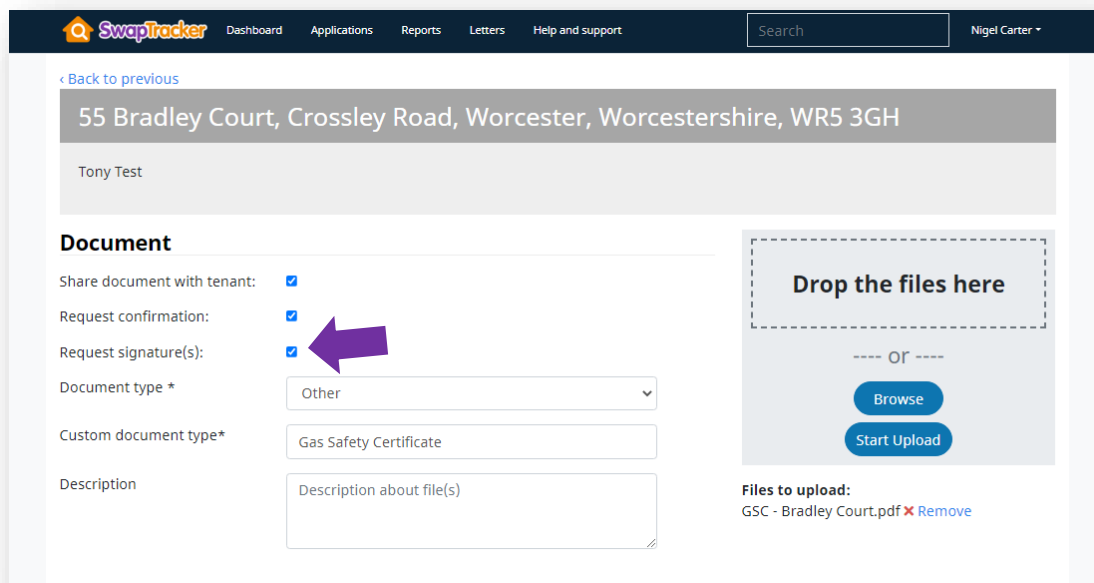
The status of each document is signified by:

- Dash – not applicable (you have not requested this)
- Cross – not done (still waiting for the tenant to confirm)
- Tick – has been done

Therefore, in the example above the tick shows that the tenant has confirmed they have received the document.

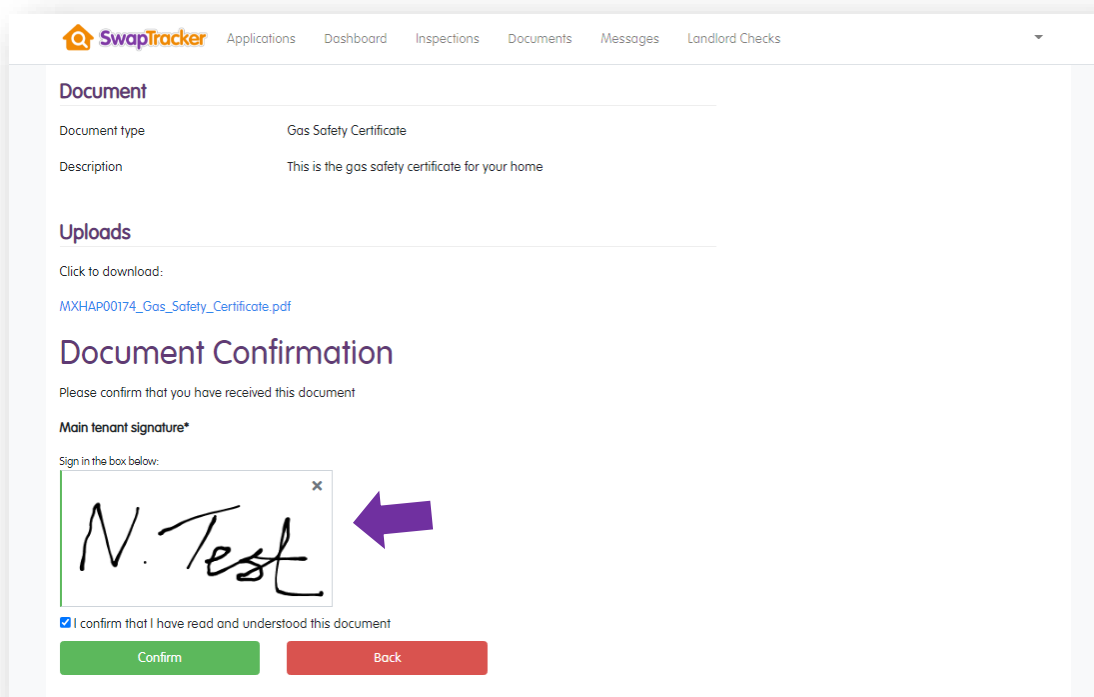
Requesting confirmation and signature

If you want the tenant to confirm receipt and provide a signature, tick the “Request signature” box:



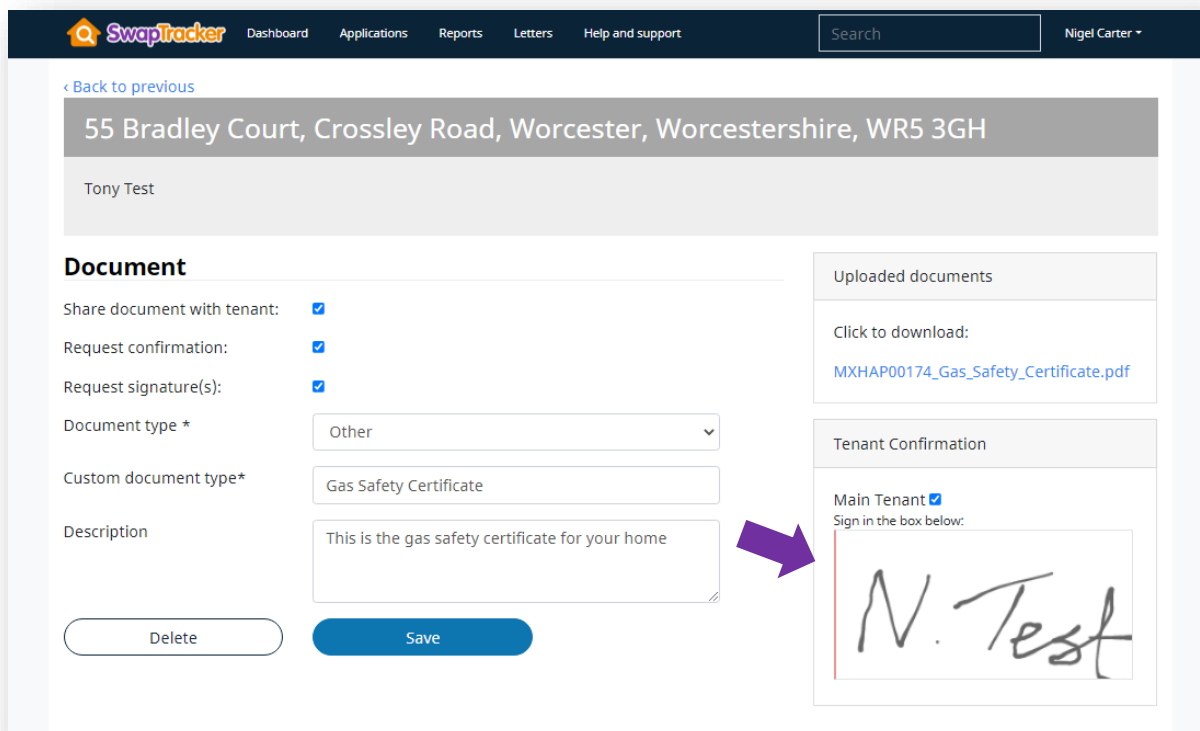
When the document is saved the tenant is emailed to inform them it is available to view and they need to confirm they have received it.

As well as ticking the box to say they have read/understood the document, they must now provide a signature also. If there is a joint applicant, they must provide a signature too:



When they click confirm, you will receive an email notifying you this has happened.

If you now view the document, you can see the signature(s) provided:



The screenshot shows the SwapTracker web application interface. At the top, there is a navigation bar with links for Dashboard, Applications, Reports, Letters, and Help and support. A search bar and the user's name, Nigel Carter, are also present. Below the navigation bar, the document details are displayed: 55 Bradley Court, Crossley Road, Worcester, Worcestershire, WR5 3GH, and the tenant's name, Tony Test. The document is titled "Document" and has the following details:

- Share document with tenant: ☒
- Request confirmation: ☒
- Request signature(s): ☒
- Document type *: Other
- Custom document type*: Gas Safety Certificate
- Description: This is the gas safety certificate for your home











At the bottom of the document details, there are "Delete" and "Save" buttons. To the right of the document details, there is a section for "Uploaded documents" with a link to download the document: [MXHAP00174_Gas_Safety_Certificate.pdf](#). Below this, there is a "Tenant Confirmation" section with a "Main Tenant" checkbox checked and a "Sign in the box below:" label. A purple arrow points from the "Description" field to the signature box, which contains the handwritten signature "N. Test".

MESSAGING TENANTS

Using SwapTracker you can send a message a tenant directly. For example, if you have any ad-hoc requests or need additional information.

Messaging can be accessed via the “Documents” section of the Application Summary page.

To send a new message click on the “+” sign:

Documents	Total	View	Add now
 Documents received	2		+
 Documents requested	1		+
 Letters	0		+
 Messages	0		+
 Notes	0		+

To send a message, you must first enter a Subject and the content of the Message:


Dashboard Applications Reports Letters Help and support

55 Bradley Court Crossley Road Worcester Worcestershire WR5 3GH

Tony Test

New message

Subject:

Example message

Message:

Edit Format

Paragraph B I U

This is an **example message** from Happy Housing.
If you have any questions about your exchange, please read our [Mutual Exchange Guide](#)

P » SPAN

22 WORDS POWERED BY TINYMCE

Cancel

Send

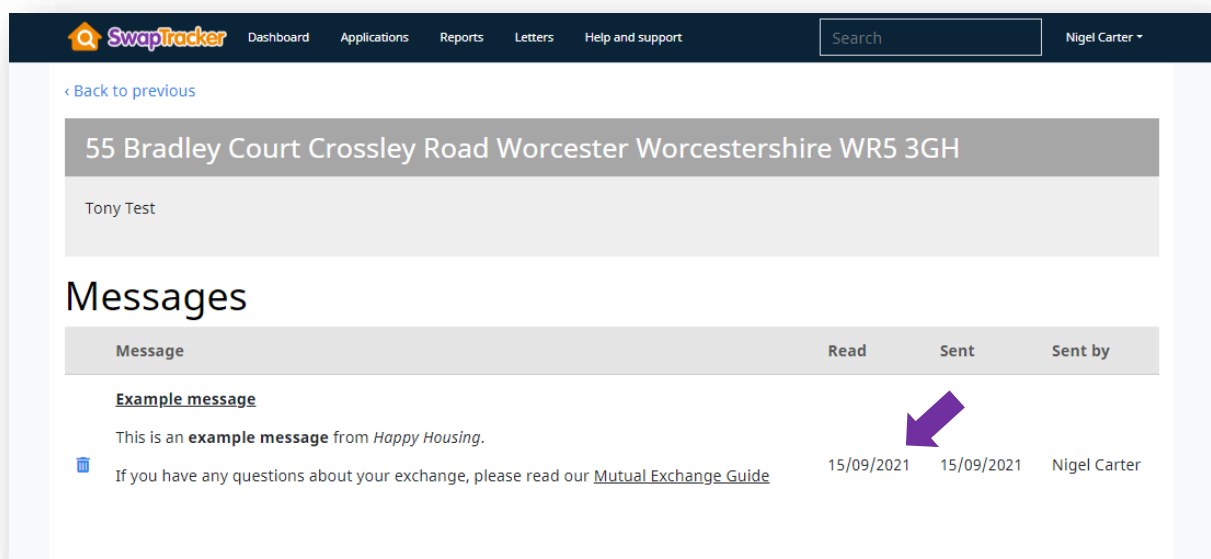
The text editor allows you format the message if required, e.g., bold, italics, underline, bullet points and add links.

When you're happy with message content click "Send". Otherwise, click "Cancel" to return to the Application Summary.

Important: you cannot change the message after you have sent it so be careful to check it thoroughly before submitting it.

When you send a message, the tenant gets an email notifying them. The email includes the subject of message but not the actual text. They must log into SwapTracker to view the whole message.

You can tell when they have read the message because the date will be displayed against it in the list of messages for that application:






The screenshot shows the SwapTracker interface. At the top, there's a navigation bar with links to Dashboard, Applications, Reports, Letters, and Help and support. A search bar and the user's name, Nigel Carter, are also present. Below the navigation bar, there's a link to "Back to previous". The main content area shows the address "55 Bradley Court Crossley Road Worcester Worcestershire WR5 3GH" and the name "Tony Test". Below this, the "Messages" section is displayed. It contains a table with columns: Message, Read, Sent, and Sent by. The first message is an "Example message" with the text "This is an example message from Happy Housing." and a link to the "Mutual Exchange Guide". A trash can icon is visible next to the message text. The "Read" and "Sent" columns both show the date "15/09/2021", and the "Sent by" column shows "Nigel Carter". A purple arrow points to the "Sent" date.

Message	Read	Sent	Sent by
Example message This is an example message from Happy Housing. If you have any questions about your exchange, please read our Mutual Exchange Guide	15/09/2021	15/09/2021	Nigel Carter


Clicking the trash can icon next to a message will delete it. When this is done, the tenant will no longer be able to access/read it.

TENANT CHECKS

A list of completed and outstanding checks for an application can be accessed from the “Actions” section of the Application Summary.

Actions	Completed	Remaining	View	Add now
 Checks	1	5		

Default checks


Dashboard Applications Reports







Nigel Carter ▼

[Back to previous](#)

Checklists - MXHAP00055

Types
All

Statuses
☐ Pending ☐ Complete ☐ Cancelled ☐ Not applicable

Type	Status	Completed	Issue found	Details
Right to Rent	Complete	16/03/2019		>
Credit Check	Pending	-		>
Affordability Check	Pending	-		>
Rent Arrears	Pending	-		>
ASB issues in last 2 years	Pending	-		>
Criminal record in last 5 years	Pending	-		>

By default, when a new application is created, SwapTracker automatically creates six checks:

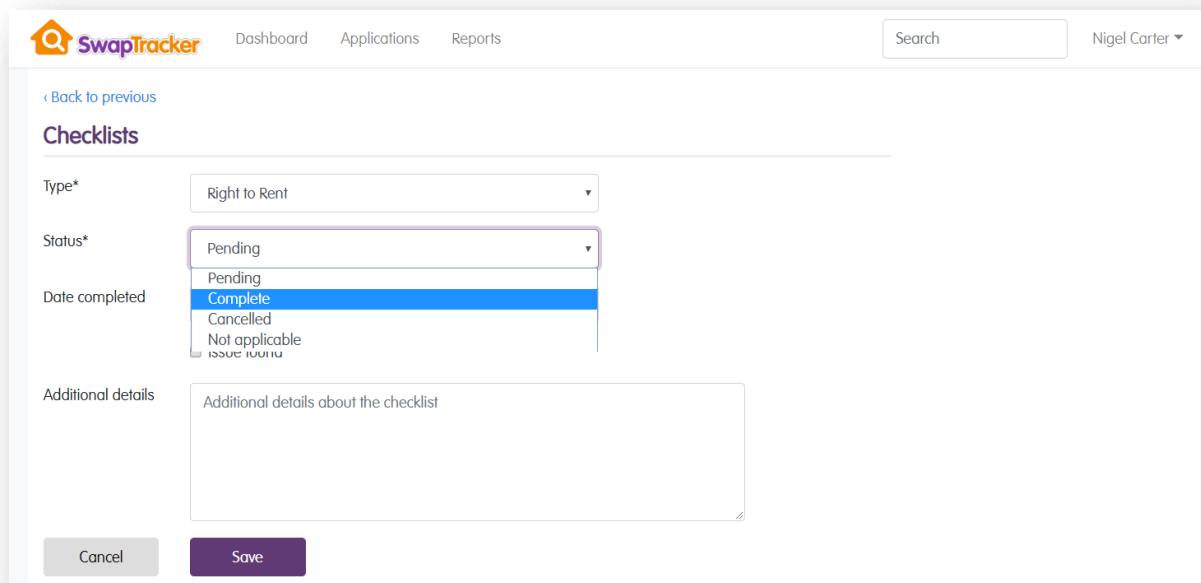
- Right to rent
- Credit check
- Affordability check
- Rent arrears
- ASB issues in the last 2 years
- Criminal record in last 5 years



If your organisation would like different default checks set up, please contact Housing Partners and we can configure these for you.


To mark a Check as “*Complete*” simply select this status from the list and click “*Save*”.

If you need to add any additional supporting information you can enter this in the “*Additional details*” box (optional).



For your own records, you can also save the date the check was completed. However, this is optional.

In the event of any issues with a check, you should tick the “*Issue found*” box and add any supporting information in the “*Additional details*” box.


Dashboard Applications Reports

Search
Nigel Carter

[Back to previous](#)

Checklists

Type*
Rent Arrears

Status*
Complete

Date completed
DD/MM/YYYY

☒ Issue found

Additional details
Rent arrears of £250 found. Tenant will need to clear this to continue

Cancel Save

Type	Status	Completed	Issue found	Details
Right to Rent	Complete	16/03/2019	<input checked="" type="checkbox"/>	>
Credit Check	Pending	-	<input checked="" type="checkbox"/>	>
Affordability Check	Pending	-	<input checked="" type="checkbox"/>	>
Rent Arrears	Complete	-	<input checked="" type="checkbox"/>	Rent arrears of £250 found. Tenant will need ... >
ASB issues in last 2 years	Pending	-	<input checked="" type="checkbox"/>	>
Criminal record in last 5 years	Pending	-	<input checked="" type="checkbox"/>	>

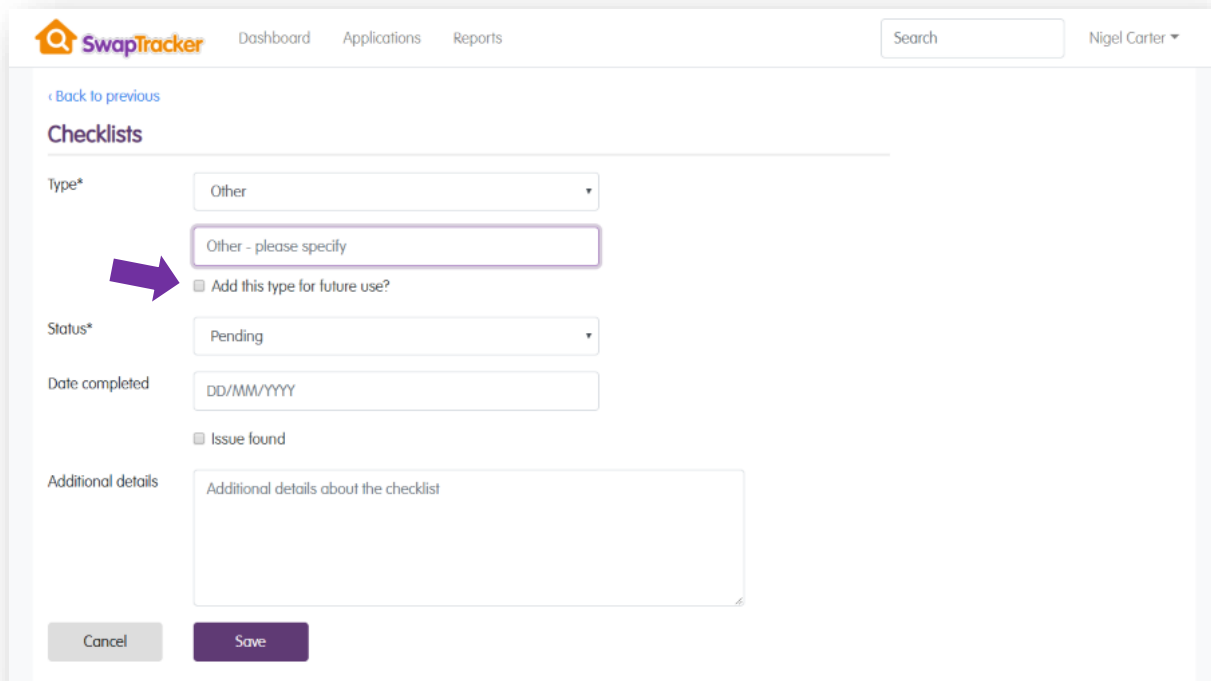
Adding new Checks

As well as the six default check types, you can also add your own checks for an application.

This is done by selecting a type from the standard list.

If you need to add a **new check type** not in the list, select “Other” and enter the new type in the text box that is revealed.

If this is a check type you will be using often, tick the “Add this type for future use?” box and the new type will be permanently saved to the list of standard check types for your organisation, i.e. next time you want to add a check of the same type it will already be in your list.



SwapTracker Dashboard Applications Reports Search Nigel Carter ▼

[Back to previous](#)

Checklists

Type* Other ▼
Other - please specify

☐ Add this type for future use?

Status* Pending ▼

Date completed DD/MM/YYYY

☐ Issue found

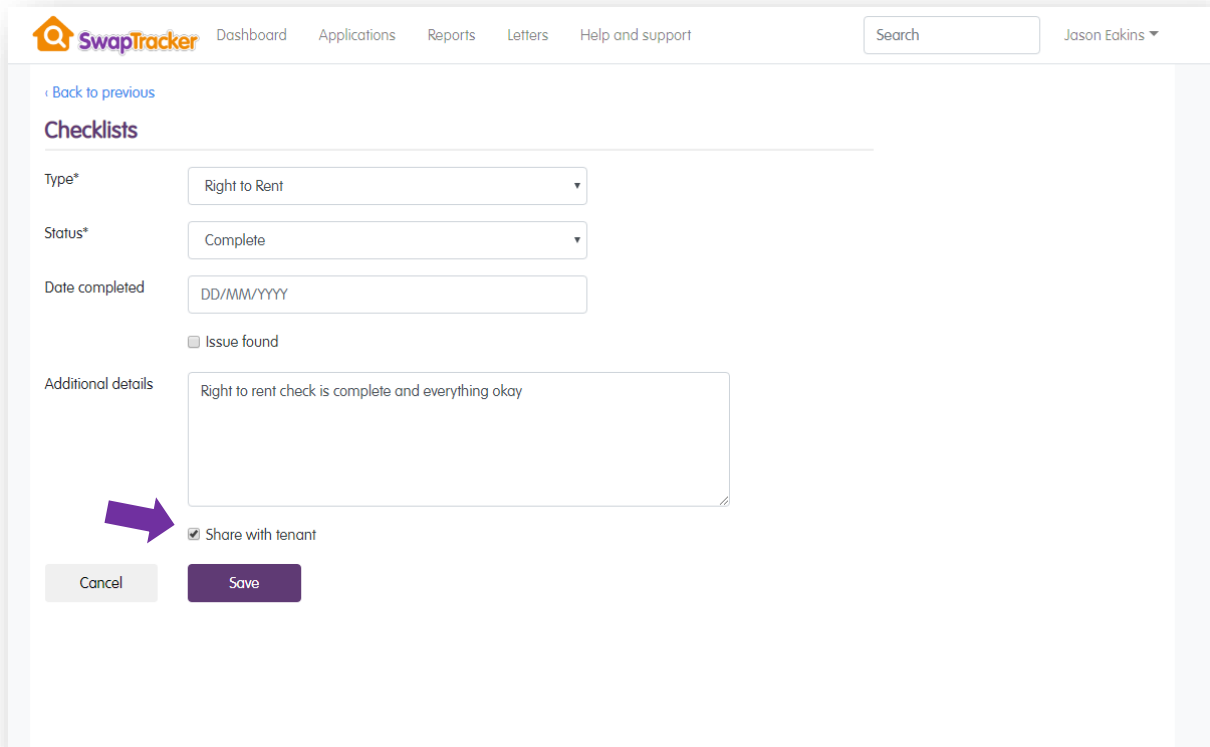
Additional details Additional details about the checklist

Cancel Save

Sharing checks with tenants

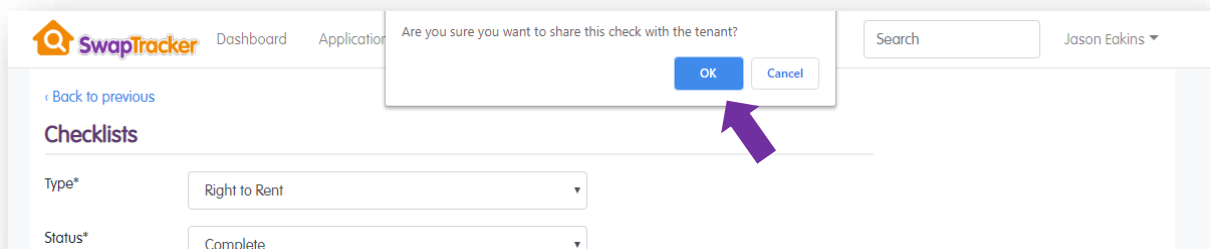
If you want to provide more transparency and keep the tenant up to date, you can also choose to “share” the checks you are performing and their outcomes.

To share a check with a tenant simply tick the “Share with tenant” box:



The screenshot shows the SwapTracker 'Checklists' form. The form includes fields for 'Type*' (Right to Rent), 'Status*' (Complete), and 'Date completed' (DD/MM/YYYY). There is a checkbox for 'Issue found' and a text area for 'Additional details' containing the text 'Right to rent check is complete and everything okay'. A purple arrow points to the 'Share with tenant' checkbox, which is checked. Below the form are 'Cancel' and 'Save' buttons.

When you click “Save” you will then be asked to confirm you wish to share it:

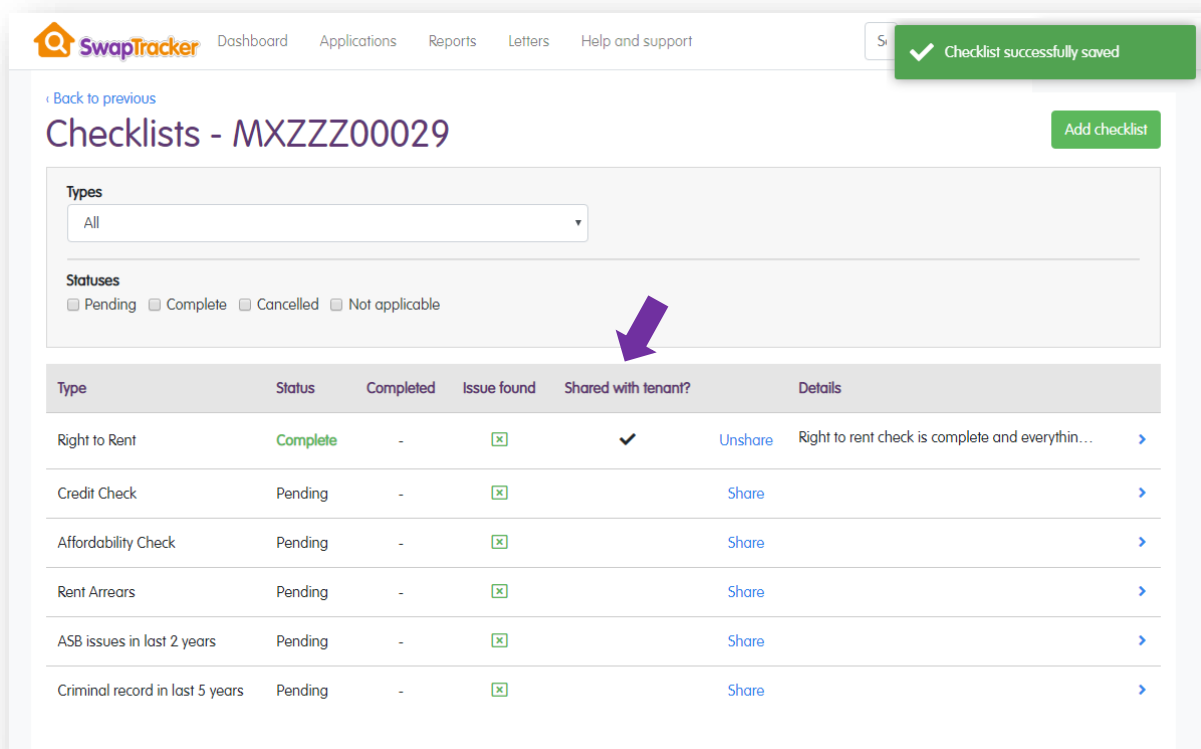


The screenshot shows the SwapTracker 'Checklists' form with a confirmation dialog box overlaid. The dialog box asks 'Are you sure you want to share this check with the tenant?' and has 'OK' and 'Cancel' buttons. A purple arrow points to the 'OK' button. The form in the background shows the 'Type*' (Right to Rent) and 'Status*' (Complete) fields.

Sharing checks allows the tenant to see them on their SwapTracker.

Note: by default, checks are NOT shared with tenants.

On the list of checks for an application you can see which are shared and which are not.



SwapTracker Dashboard Applications Reports Letters Help and support

Checklist successfully saved

Back to previous

Checklists - MXZZZ00029

Add checklist

Types

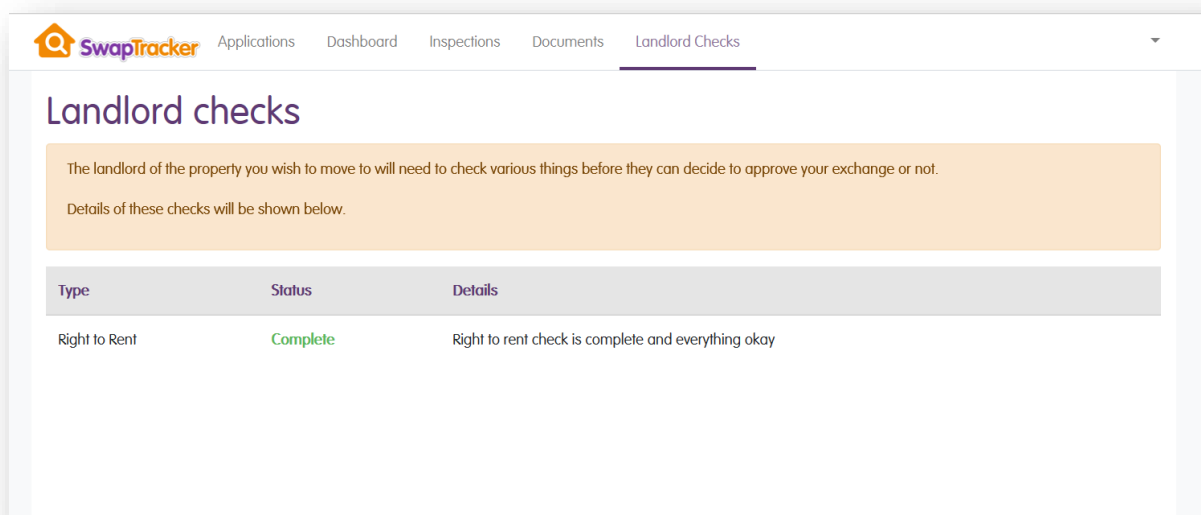
All

Statuses

☐ Pending ☐ Complete ☐ Cancelled ☐ Not applicable

Type	Status	Completed	Issue found	Shared with tenant?	Details
Right to Rent	Complete	-	<input checked="" type="checkbox"/>	✓	Unshare Right to rent check is complete and everythin... >
Credit Check	Pending	-	<input checked="" type="checkbox"/>		Share >
Affordability Check	Pending	-	<input checked="" type="checkbox"/>		Share >
Rent Arrears	Pending	-	<input checked="" type="checkbox"/>		Share >
ASB issues in last 2 years	Pending	-	<input checked="" type="checkbox"/>		Share >
Criminal record in last 5 years	Pending	-	<input checked="" type="checkbox"/>		Share >

When you do share a check, the tenant receives an email notifying them of this. When they log into SwapTracker, they can then see details of their checks in the “Landlord Checks” section:



SwapTracker Applications Dashboard Inspections Documents Landlord Checks

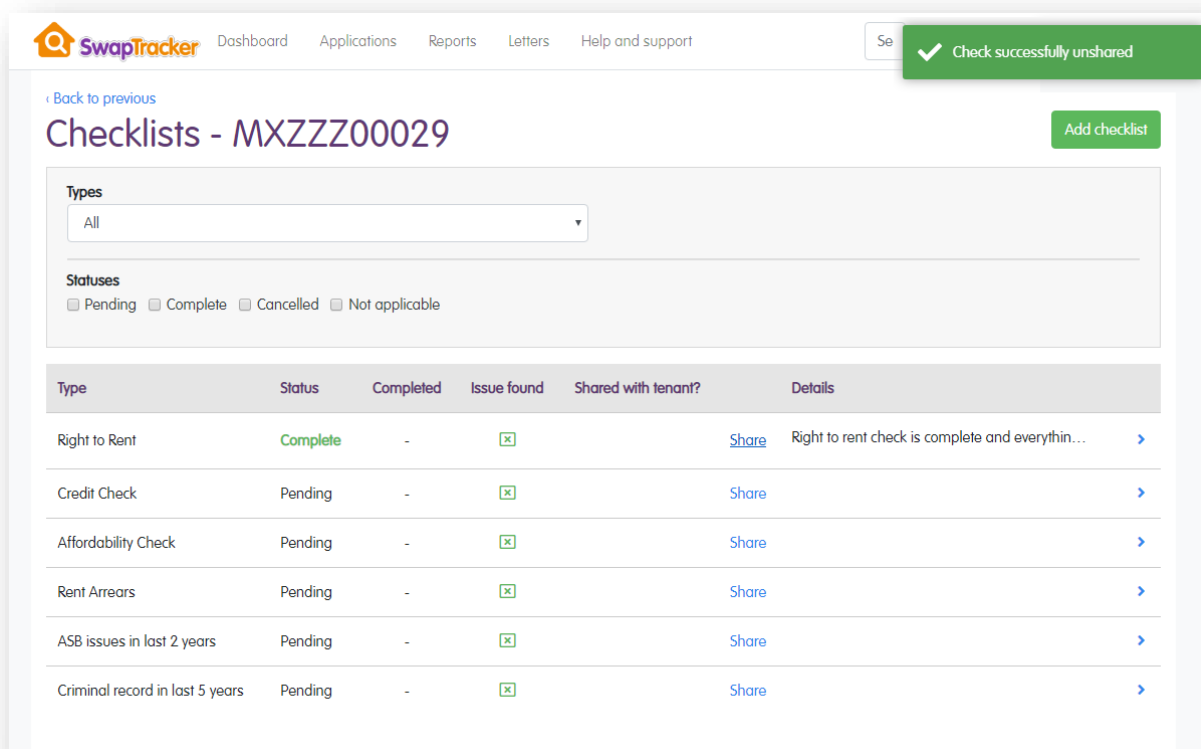
Landlord checks

The landlord of the property you wish to move to will need to check various things before they can decide to approve your exchange or not.

Details of these checks will be shown below.

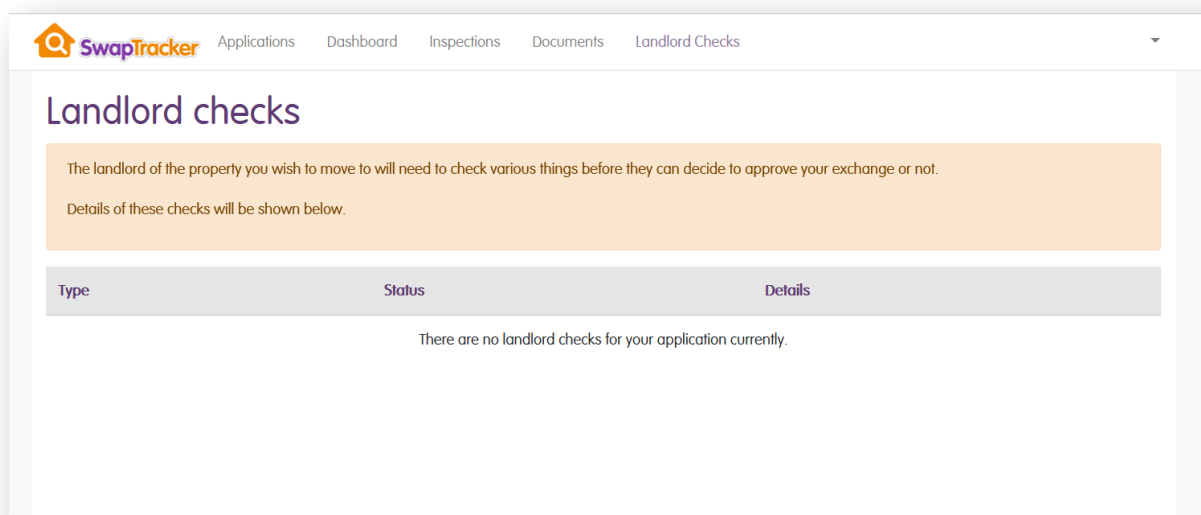
Type	Status	Details
Right to Rent	Complete	Right to rent check is complete and everything okay

If you need to un-share a check, simply click the “Unshare” link next to it.



Type	Status	Completed	Issue found	Shared with tenant?	Details
Right to Rent	Complete	-	x		Share Right to rent check is complete and everythin... >
Credit Check	Pending	-	x		Share >
Affordability Check	Pending	-	x		Share >
Rent Arrears	Pending	-	x		Share >
ASB issues in last 2 years	Pending	-	x		Share >
Criminal record in last 5 years	Pending	-	x		Share >

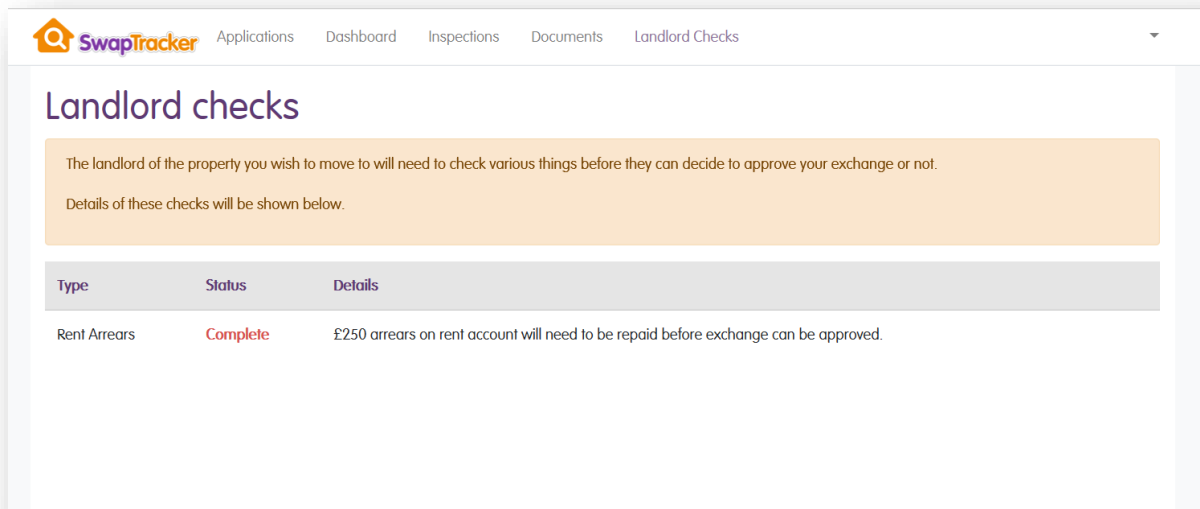
The check will then be hidden from the tenant’s SwapTracker.



Type	Status	Details
There are no landlord checks for your application currently.		

As with un-sharing, you can also share an existing check, by clicking the “Share” link next to it. Again, the tenant is emailed and will be able to see that check in their SwapTracker.

Note: all checks that are shared can be seen by the tenant in the their “Landlord Checks” section, including any additional information you may have entered.







Type	Status	Details
Rent Arrears	Complete	£250 arrears on rent account will need to be repaid before exchange can be approved.

For this reason, you should always be careful not share any checks you would not want the tenant to see!

INSPECTIONS & MEETINGS (APPOINTMENTS)

Scheduling appointments

Inspections/meetings related to an application can be viewed and added from the “Actions” section of the Application Summary page.

Actions	Completed	Remaining	View	Add now
 Checks	0	6		+
 Inspections/meetings	0	1		+

The list of appointments can also be filtered by type, status and time period.

Inspections/meetings - MXHAP00055

Inspections/ meetings only
☒ Both
☐ Inspections only
☐ Meetings only

Types

All

Statuses
☐ Cancelled
☐ Completed
☐ Confirmed
☐ New
☐ Rejected
☐ Rejected – alternative proposed
☐ Waiting confirmation

Upcoming inspections
☐ Upcoming only

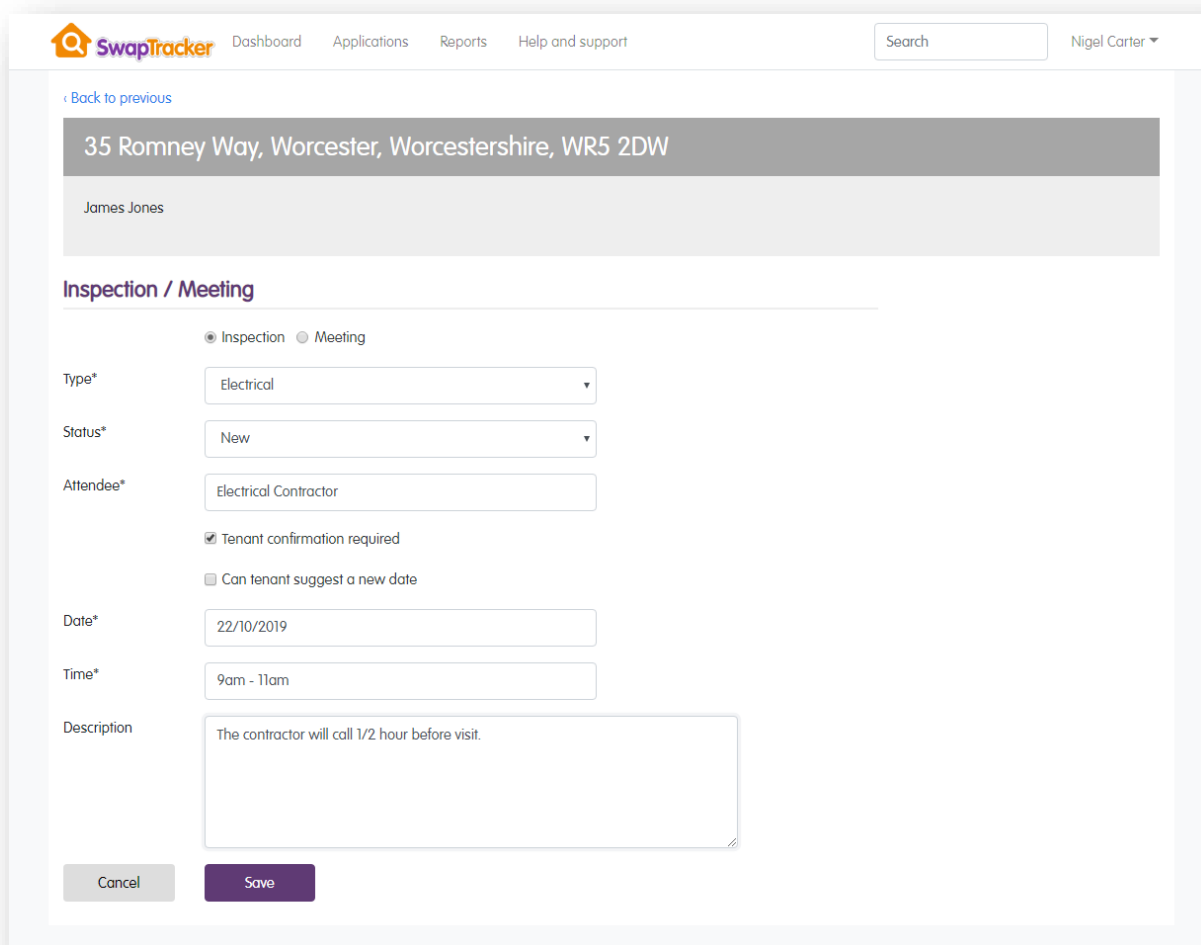
Overdue only
☐ Overdue only

Next week only
☐ Next week only

Address	Type	Days remaining	Date scheduled	Status
79 Maidstone Road, WENVOE, CF5 9BX	Electrical	15	01 Apr 2019	Waiting confirmation

When adding a new appointment, you can enter the following information:

- Is it an inspection or a meeting?
- The type of appointment, e.g. property inspection
- The status (the default is “New”)
- The “attendee” – a text description of who will be attending
- Tenant confirmation required? – see description below
- Date – the date of the appointment
- Time – this is a text field not a specific time, e.g. “Between 9am and 11am”
- Description – an optional description of the appointment. This can be seen by your tenant and is useful for entering any additional information they may find helpful.



35 Romney Way, Worcester, Worcestershire, WR5 2DW

James Jones

Inspection / Meeting

☒ Inspection ☐ Meeting

Type*

Status*

Attendee*

☒ Tenant confirmation required

☐ Can tenant suggest a new date

Date*

Time*

Description

Appointments will appear on your SwapTracker dashboard when they are coming up (the date is in the next 7 days) and overdue (the date is in the past and they have not been set to “Complete”).

Tenant Confirmation

When adding an appointment, you can allow the tenant to confirm the date and time.

This is done by ticking the “*Tenant confirmation required?*” box.

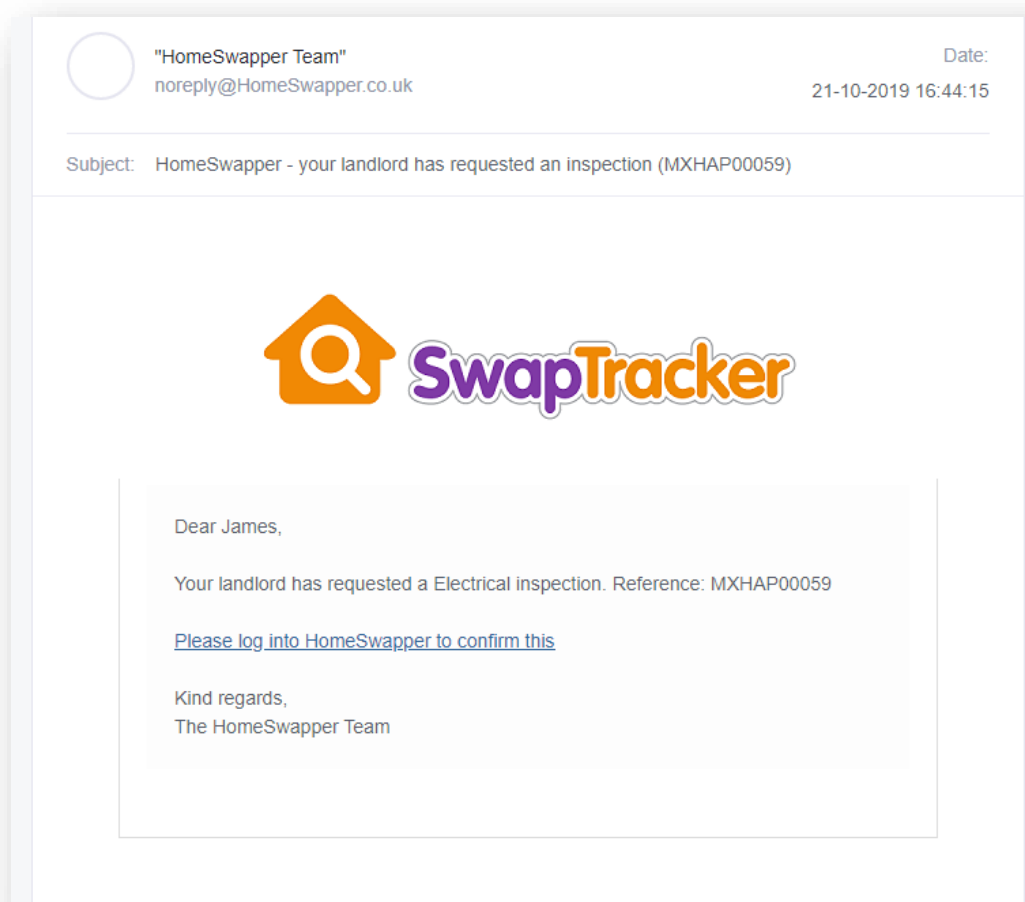
If this is ticked the tenant will be sent an email with the details of the inspection/meeting and a notification will be displayed on their SwapTracker dashboard.

The status of the appointment will be set to “*Waiting confirmation*”.

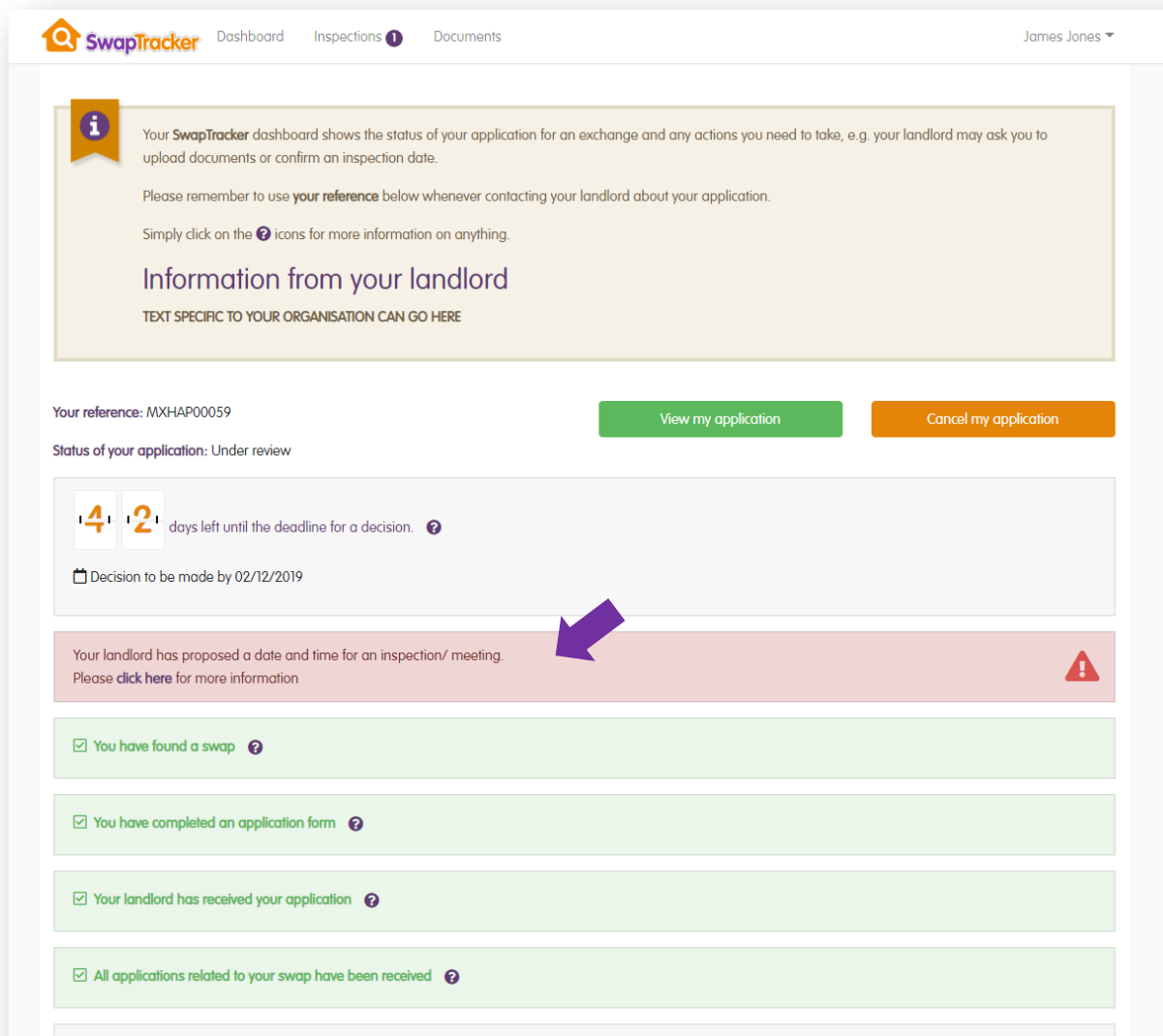
If you are happy with them suggesting another date, tick the “*Can tenant suggest a new date*” box also.

If you do NOT want them to suggest an alternative date, they will only be able to confirm it (this is the default setting!).

An email is sent to the tenant notifying them that they need to confirm the appointment:



When they log into SwapTracker, there is also a notification on their dashboard:



The screenshot shows the SwapTracker dashboard for a user named James Jones. The dashboard includes a navigation bar with links to Dashboard, Inspections (1), and Documents. A prominent notification box at the top provides information about the user's application status and actions they need to take. Below this, the user's reference number (MXHAP00059) and application status (Under review) are displayed, along with buttons to 'View my application' and 'Cancel my application'. A countdown timer indicates 4 days and 2 hours left until the deadline for a decision. A red notification bar highlights that the landlord has proposed a date and time for an inspection/meeting, with a purple arrow pointing to the 'click here' link for more information. At the bottom, a checklist shows four completed tasks: finding a swap, completing an application form, receiving the application from the landlord, and receiving all related applications.

SwapTracker Dashboard Inspections 1 Documents James Jones ▾

Information from your landlord
 TEXT SPECIFIC TO YOUR ORGANISATION CAN GO HERE

Your reference: MXHAP00059 [View my application](#) [Cancel my application](#)

Status of your application: Under review

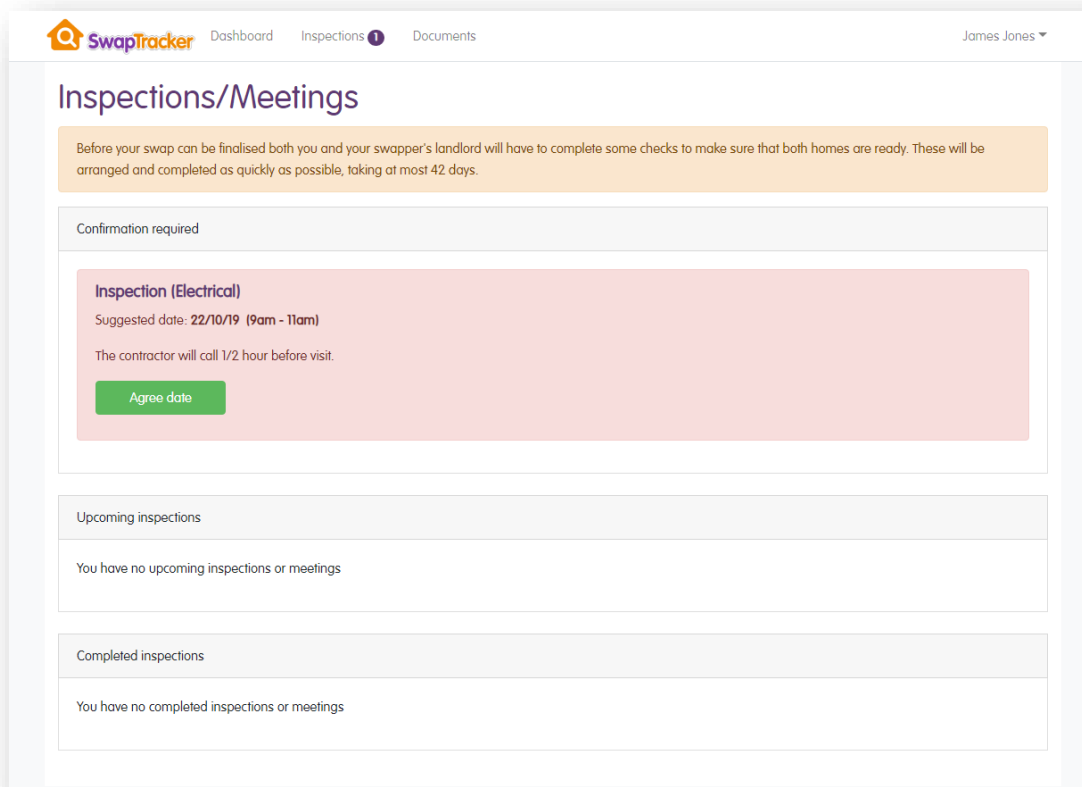
4 **2** days left until the deadline for a decision. ?

Decision to be made by 02/12/2019

Your landlord has proposed a date and time for an inspection/ meeting. Please [click here](#) for more information

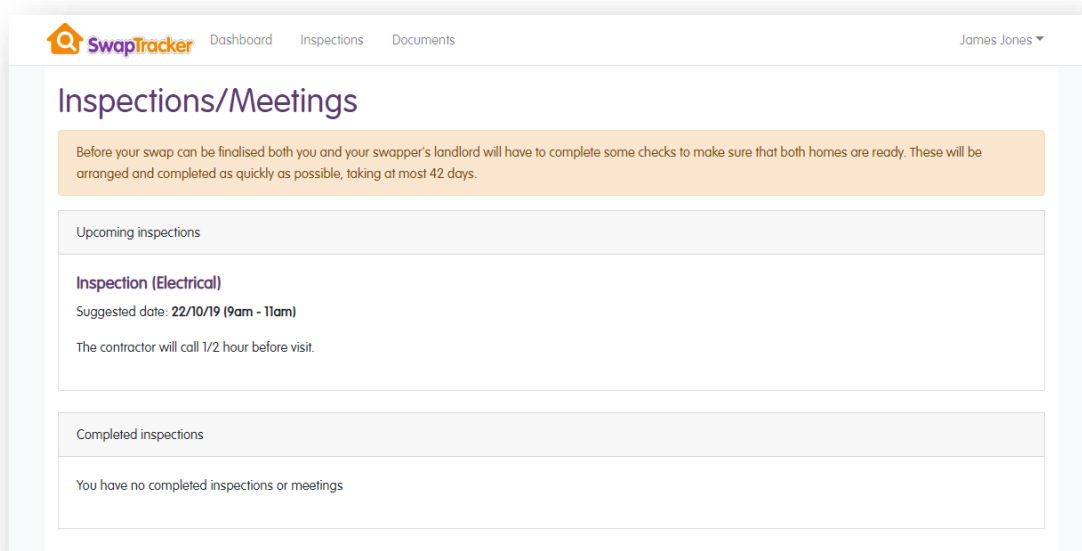
- ☒ You have found a swap ?
- ☒ You have completed an application form ?
- ☒ Your landlord has received your application ?
- ☒ All applications related to your swap have been received ?

Clicking the notification (or “Inspections” tab in the top menu) shows them details of appointment they need to confirm:



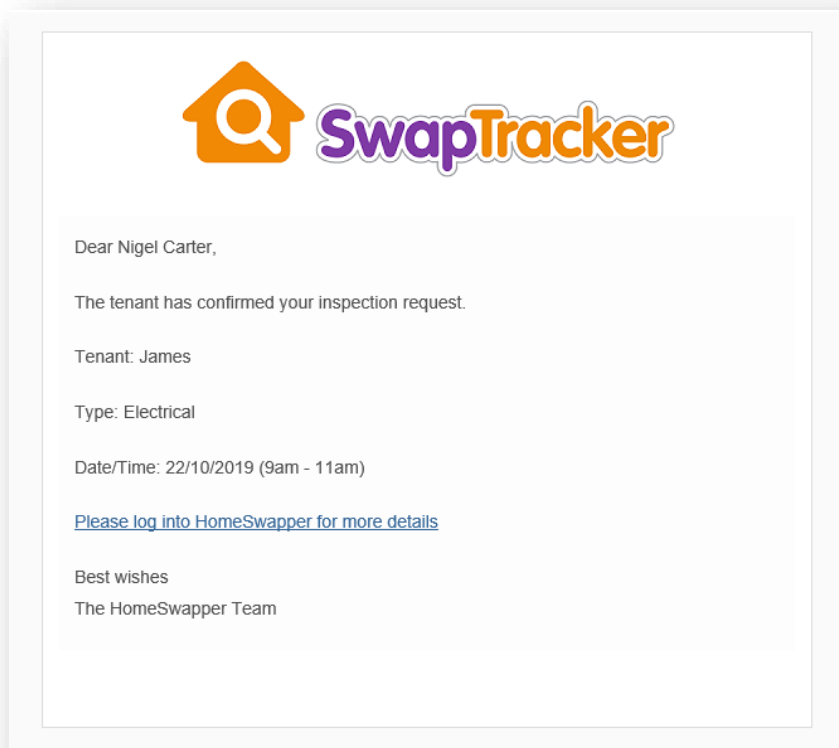
The screenshot shows the 'Inspections/Meetings' page in the SwapTracker app. The top navigation bar includes 'Dashboard', 'Inspections' (with a notification icon), and 'Documents'. The user's name 'James Jones' is in the top right. A message at the top states: 'Before your swap can be finalised both you and your swapper's landlord will have to complete some checks to make sure that both homes are ready. These will be arranged and completed as quickly as possible, taking at most 42 days.' Below this, a section titled 'Confirmation required' contains a pink box with the following details: 'Inspection (Electrical)', 'Suggested date: 22/10/19 (9am - 11am)', and 'The contractor will call 1/2 hour before visit.' A green 'Agree date' button is at the bottom of this box. Below the confirmation section, there are two empty sections: 'Upcoming inspections' and 'Completed inspections', both stating 'You have no upcoming inspections or meetings' and 'You have no completed inspections or meetings' respectively.

When the tenant clicks on “*Agree date*”, the status of the appointment is set to “*Confirmed*”.

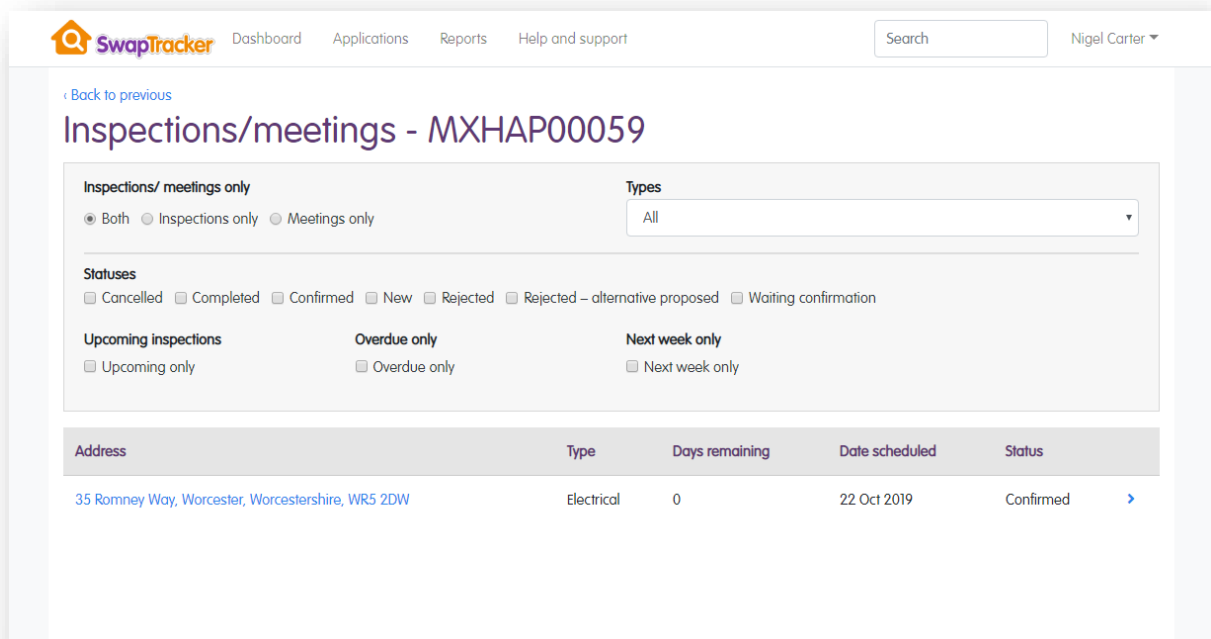


This screenshot shows the same 'Inspections/Meetings' page after the 'Agree date' button has been clicked. The layout is identical to the previous screenshot, but the 'Upcoming inspections' section now displays the 'Inspection (Electrical)' details: 'Suggested date: 22/10/19 (9am - 11am)' and 'The contractor will call 1/2 hour before visit.' The 'Completed inspections' section remains empty with the message 'You have no completed inspections or meetings'.

You will also receive an email notifying you of this:











The appointment is shown as “*Confirmed*” in the list of inspections/meetings for that application:




NOTES

Ad-hoc notes can be added against an application.

Documents	Total	View	Add now
 Documents received	0		+
 Documents requested	0		+
 Notes	0		+
 Letters			+

Simply add a text note and an optional review date (see [Notes for review](#))


Dashboard Applications Reports Help and support

Nigel Carter ▼

[Back to previous](#)

35 Romney Way, Worcester, , Worcestershire, WR5 2DW

James Jones

Note

Text*

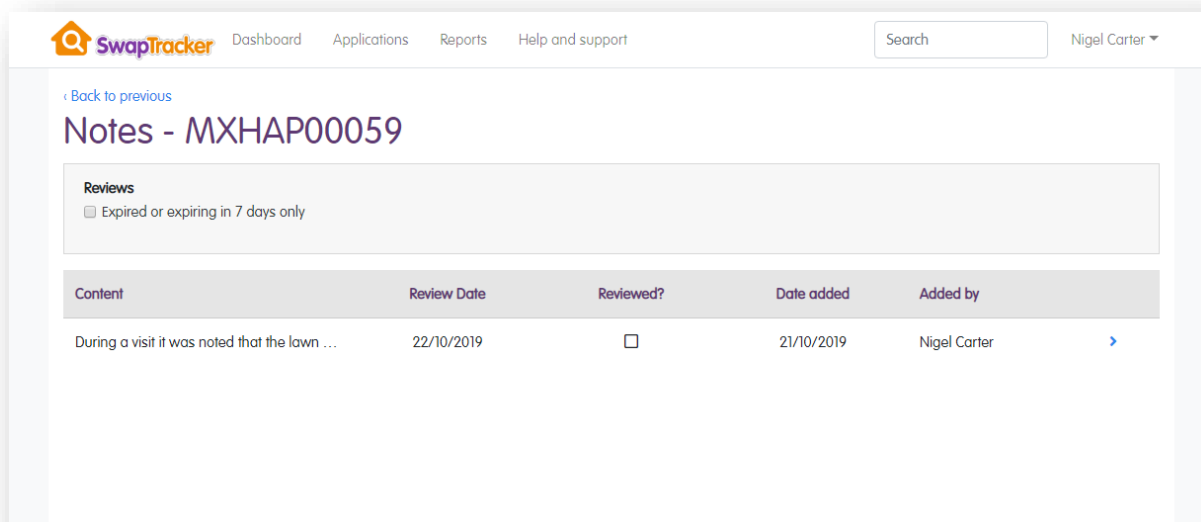
During a visit it was noted that the lawn in the rear garden was excessively long.

Tenant must resolve this before we application can be approved.

Review date

☐ Reviewed

Important – Tenants **cannot** see any Notes you have added against their application. These cannot be “shared”.



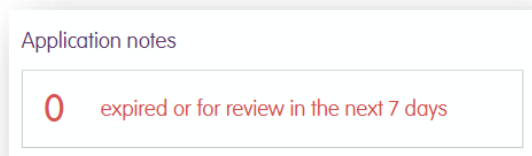
The screenshot shows the SwapTracker application interface. At the top, there is a navigation bar with links for Dashboard, Applications, Reports, and Help and support. A search bar and the user's name, Nigel Carter, are also present. Below the navigation bar, there is a link to 'Back to previous' and a title 'Notes - MXHAP00059'. A section titled 'Reviews' contains a checkbox labeled 'Expired or expiring in 7 days only'. Below this, a table displays a list of notes for review.

Content	Review Date	Reviewed?	Date added	Added by
During a visit it was noted that the lawn ...	22/10/2019	<input type="checkbox"/>	21/10/2019	Nigel Carter

Notes for review

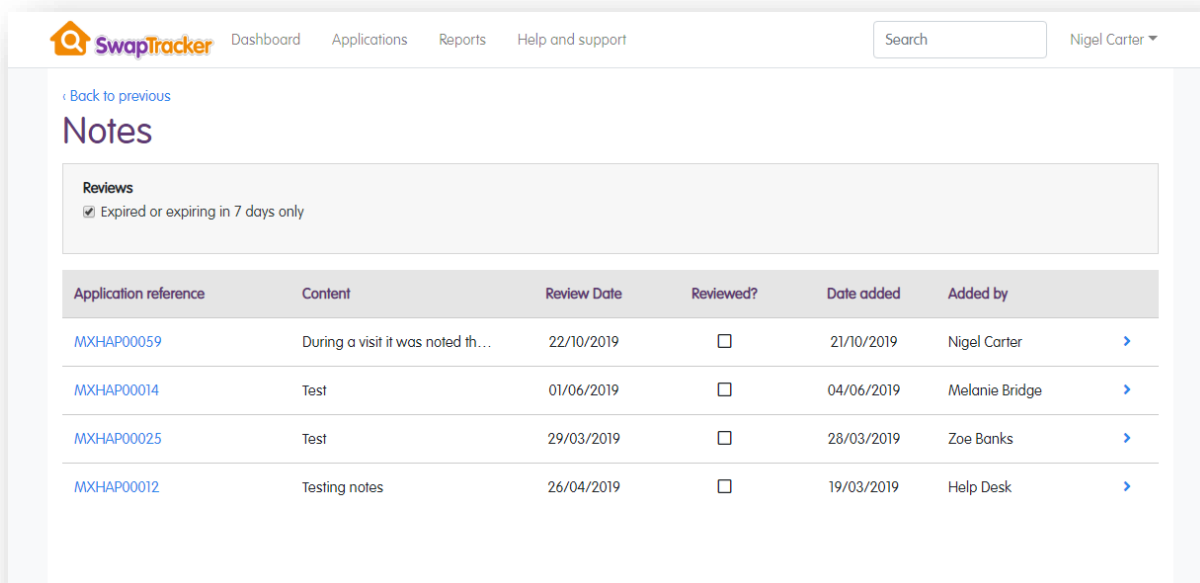
When adding a note, you can set an optional review date. Use this where you need a reminder.

Any notes with a review date in the next 7 days will be highlighted on your SwapTracker dashboard.



The screenshot shows a section titled 'Application notes'. Below the title, there is a summary box with a red circle containing the number '0' and the text 'expired or for review in the next 7 days'.

Clicking this total will take you to a list of all notes that have expired or will do in the next 7 days:



SwapTracker Dashboard Applications Reports Help and support Search Nigel Carter ▾

[Back to previous](#)

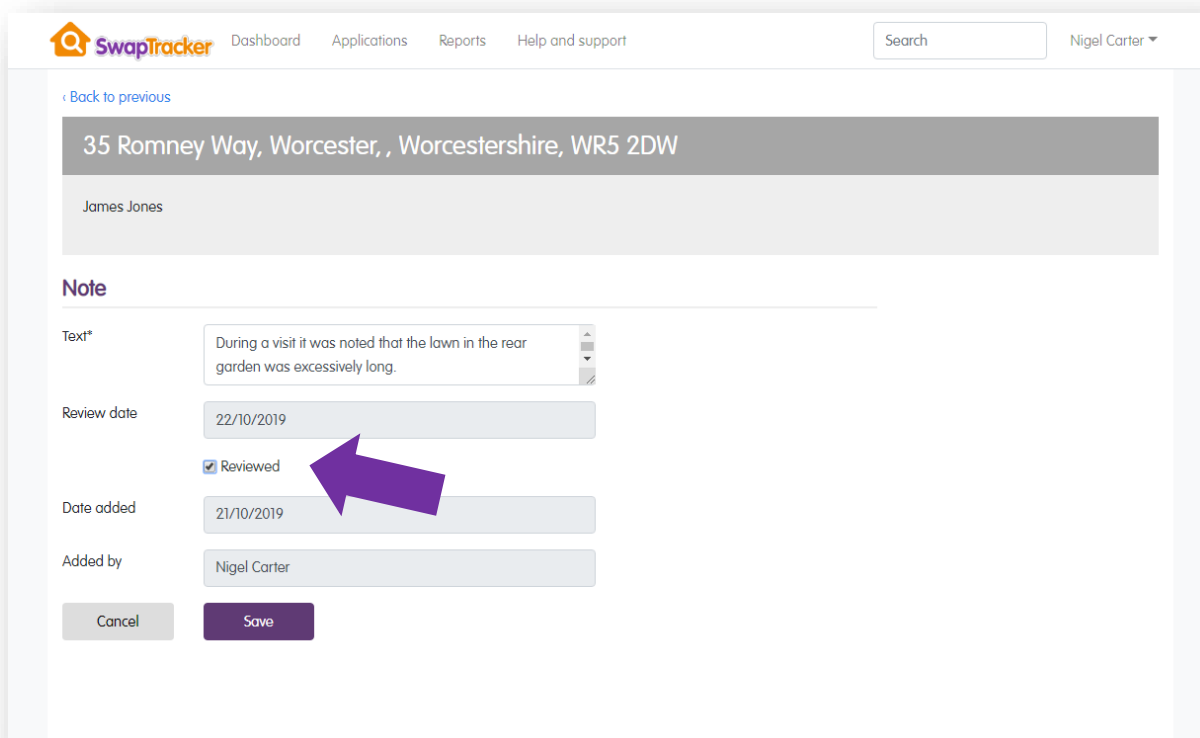
Notes

Reviews

☒ Expired or expiring in 7 days only

Application reference	Content	Review Date	Reviewed?	Date added	Added by
MXHAP00059	During a visit it was noted th...	22/10/2019	<input type="checkbox"/>	21/10/2019	Nigel Carter >
MXHAP00014	Test	01/06/2019	<input type="checkbox"/>	04/06/2019	Melanie Bridge >
MXHAP00025	Test	29/03/2019	<input type="checkbox"/>	28/03/2019	Zoe Banks >
MXHAP00012	Testing notes	26/04/2019	<input type="checkbox"/>	19/03/2019	Help Desk >

To mark a note as reviewed, simply tick the “Reviewed” box and save it. It will no longer appear on your Dashboard workflow.



SwapTracker Dashboard Applications Reports Help and support Search Nigel Carter ▾

[Back to previous](#)

35 Romney Way, Worcester, , Worcestershire, WR5 2DW

James Jones

Note

Text*

Review date

☒ Reviewed

Date added

Added by

TENANT REFERENCES

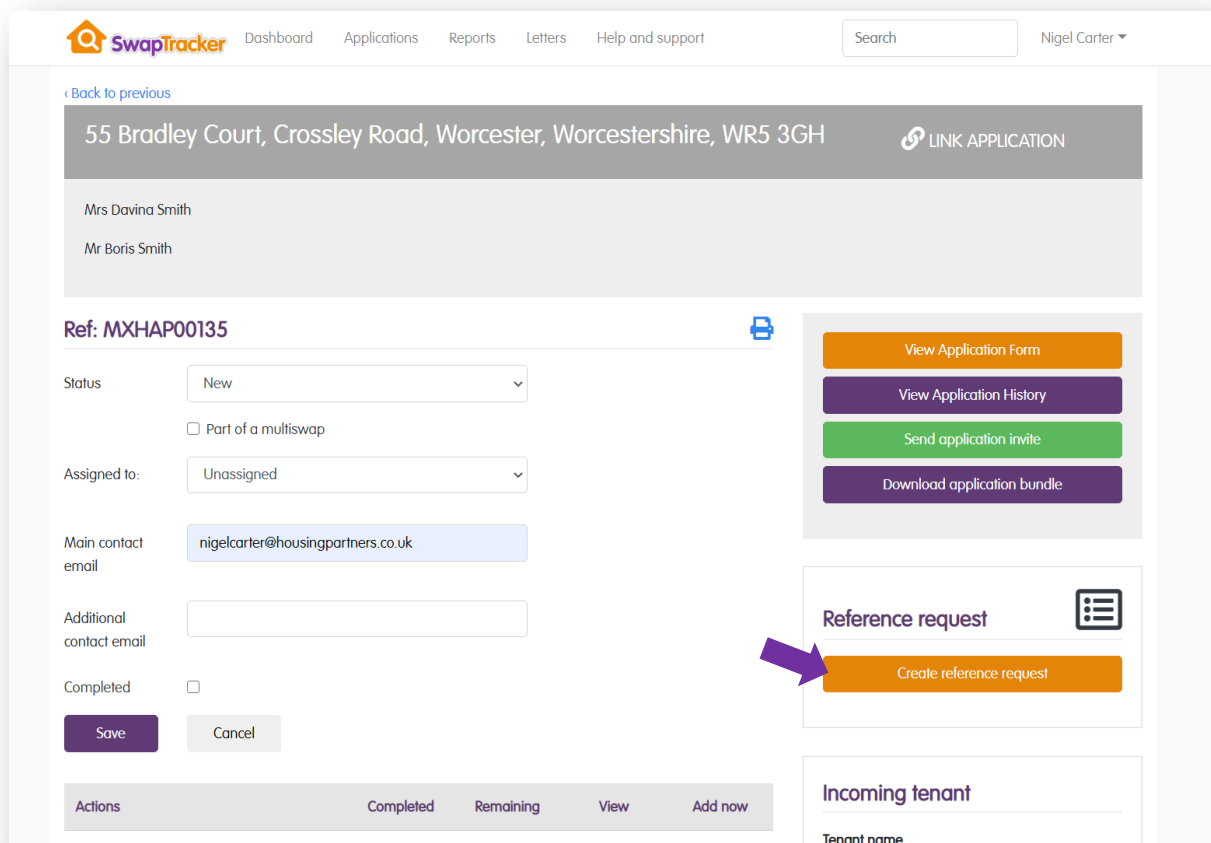
Using SwapTracker, you can request a reference for a potential new tenant.

You can request a reference from any landlord you have contact details for. They do not have to be currently using SwapTracker.

Requesting a reference

To request a reference, click on the “*Create reference request*” button in the “*Reference request*” panel.


Note: if both applicants involved in the exchange are your existing tenants, no references are required and the “*Reference request*” panel will not be shown.



The screenshot shows the SwapTracker application form for a property at 55 Bradley Court, Crossley Road, Worcester, Worcestershire, WR5 3GH. The form includes fields for the applicant's name (Mrs Davina Smith, Mr Boris Smith), a reference number (Ref: MXHAP00135), status (New), assigned to (Unassigned), main contact email (nigelcarter@housingpartners.co.uk), and an additional contact email field. There are buttons for 'View Application Form', 'View Application History', 'Send application invite', and 'Download application bundle'. A purple arrow points to the 'Create reference request' button in the 'Reference request' panel. At the bottom, there is a table with columns: Actions, Completed, Remaining, View, and Add now. The 'Incoming tenant' section is also visible.

Important – Tenants **cannot** see any references against their application. These cannot be “shared”.

After clicking the “*Create reference request*” button, you are taken to the Tenant reference request form.


Dashboard Applications Reports Letters Help and support

Search
Nigel Carter ▼

MXHAP00135
Mrs Davina Smith / Mr Boris Smith
55 Bradley Court Crossley Road

[Back to previous](#)

Tenant reference request

Please ensure the email address is correct before submitting your reference request. An email will be sent to the recipient including tenant details.

Your details

*** Contact name**

*** Contact number**

Additional notes (optional)

Their tenant

*** Main tenant title**

*** Main tenant first name**

*** Main tenant last name**

Joint tenant title

Joint tenant first name

Joint tenant last name

*** Tenant address**

Address*
55 Bradley Court Crossley Road, Worcester, Worcestershire, WR5 3GH

Change address

Referee details

*** Landlord**

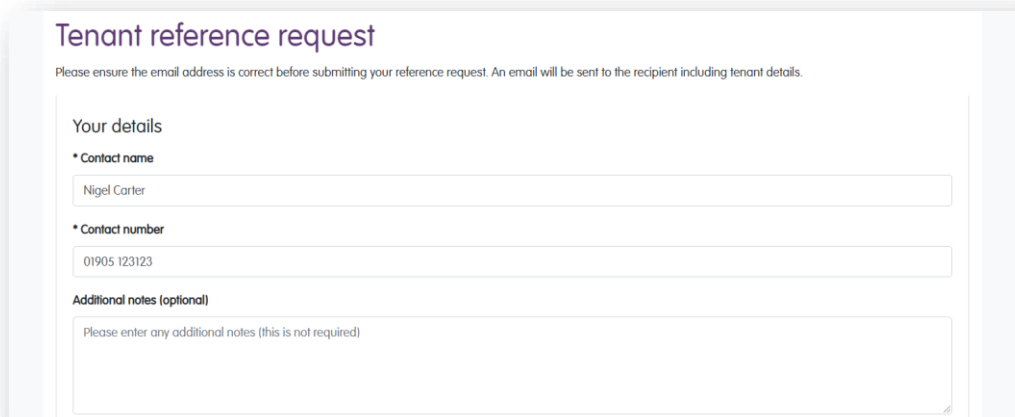
*** Email address**

Cancel Submit

Your details

The first part of the request form is where you enter your contact information in case the other landlord needs to get in touch. This is automatically populated from your login details but can be overwritten if you wish.

You can also enter any additional notes if there is anything specific you want the other landlord to know or provide. This is optional.



Tenant reference request

Please ensure the email address is correct before submitting your reference request. An email will be sent to the recipient including tenant details.

Your details

* Contact name
Nigel Carter

* Contact number
01905 123123

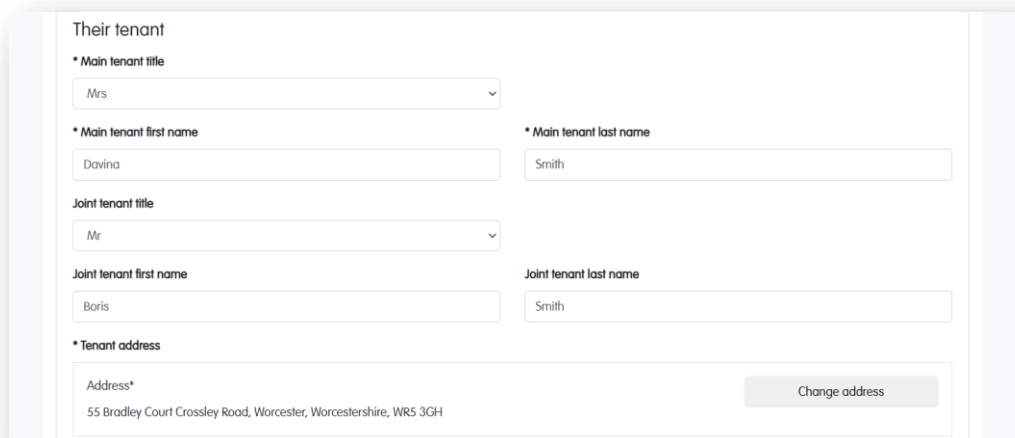
Additional notes (optional)
Please enter any additional notes (this is not required)

Their tenant

The second part of the request form is for details of the person(s) you require a reference for.

This is automatically populated from their MX application form but can be overwritten if you wish.

SwapTracker checks the application form and if the person applying is not your tenant, their details are used (from the “*Your details*” section). If the person they are swapping with is not your tenant, their details are used instead (from the “*Their details*” section).



Their tenant

* Main tenant title
Mrs

* Main tenant first name
Davina

* Main tenant last name
Smith

Joint tenant title
Mr

Joint tenant first name
Boris

Joint tenant last name
Smith

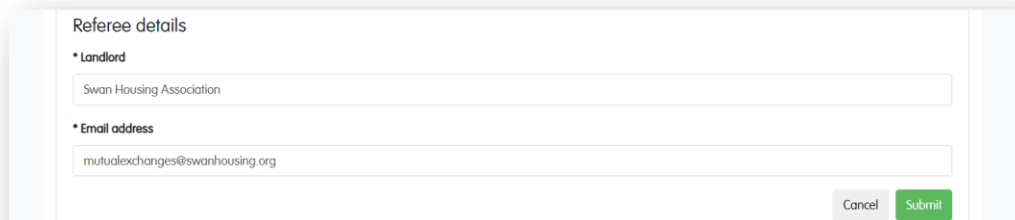
* Tenant address
Address*
55 Bradley Court Crossley Road, Worcester, Worcestershire, WR5 3GH

Change address

Referee details

Finally, you need to enter the landlord name and the email address you want the reference request to be sent to.

The landlord name is pre-populated from the details the tenant provided in the MX application form. However, you can change this if you wish.



Referee details

* Landlord

Swan Housing Association

* Email address

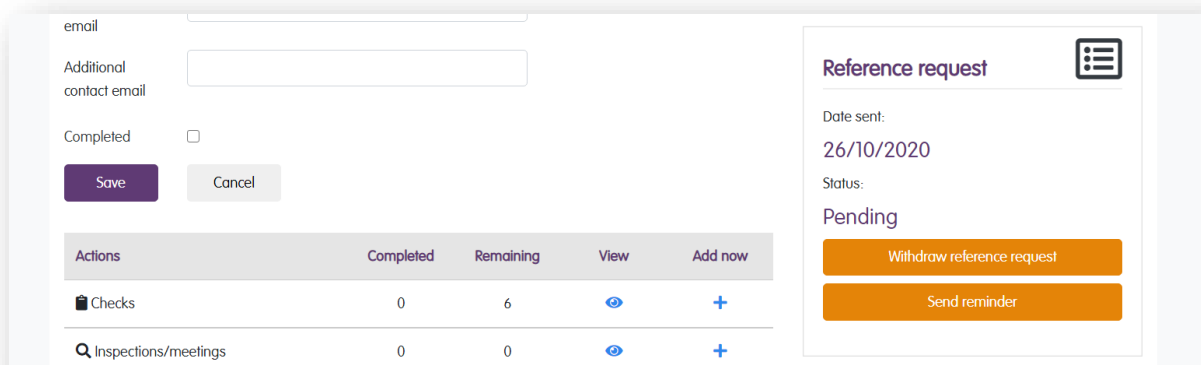
mutualexchanges@swanhousing.org

Cancel Submit

When you are happy with the request form, click “*Submit*” to send the reference request to the landlord.

Otherwise, click “*Cancel*” and no reference will be requested.

When a request is submitted, the “*Reference request*” panel will now show the date it was sent and a status of “*Pending*” (i.e. you’re now waiting for the landlord to complete it).



email

Additional contact email

Completed ☐

Save Cancel

Actions	Completed	Remaining	View	Add now
Checks	0	6	View	+
Inspections/meetings	0	0	View	+

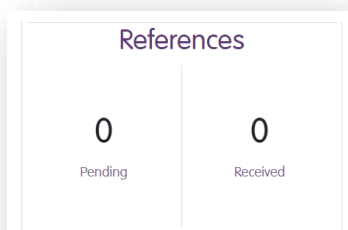
Reference request

Date sent:
26/10/2020

Status:
Pending

Withdraw reference request

Send reminder



References

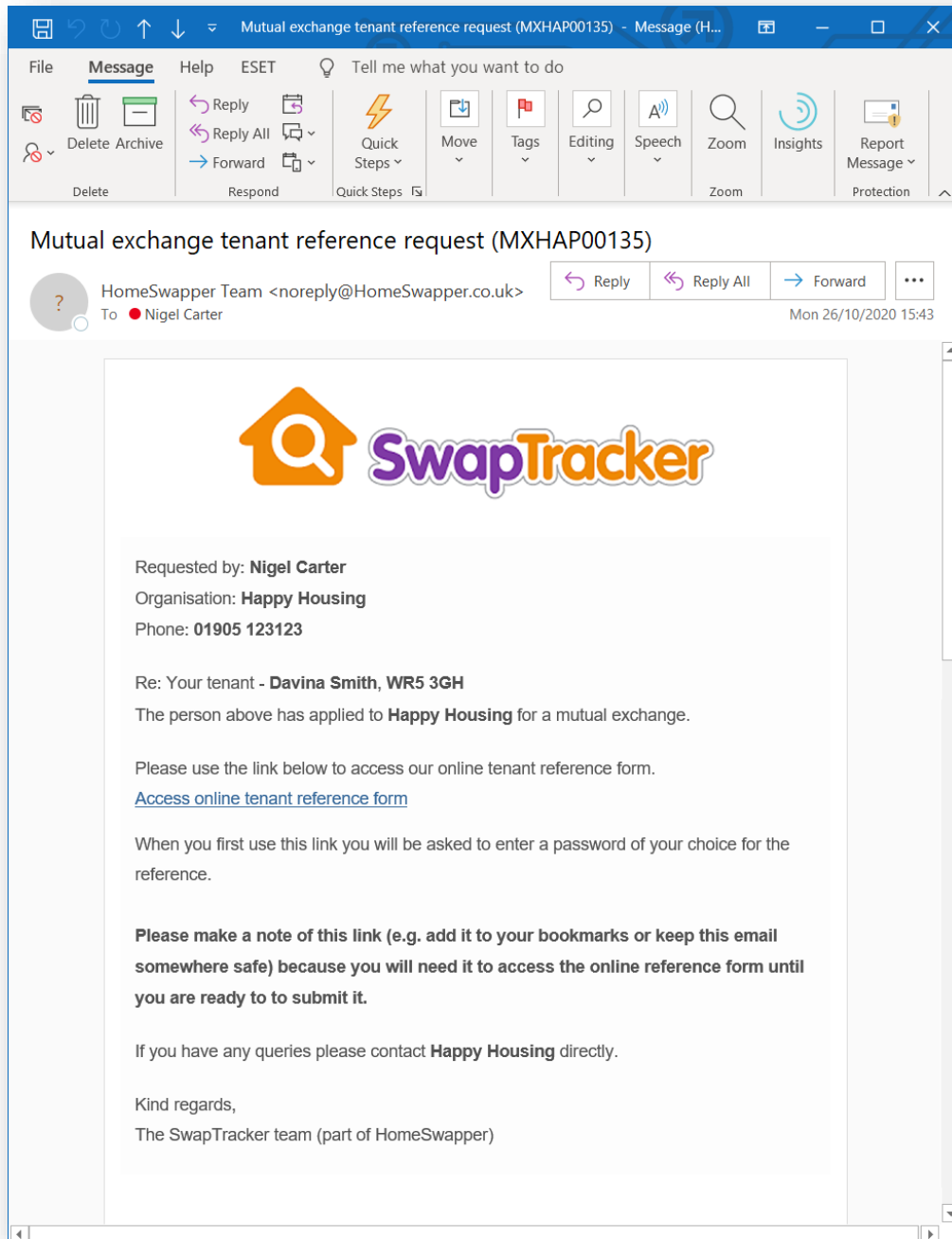
0 Pending

0 Received

You can easily get to any reference requests that you have not yet got back from the landlord, by clicking the “*Pending*” total on the “*Reference*” panel on your organisation’s dashboard.

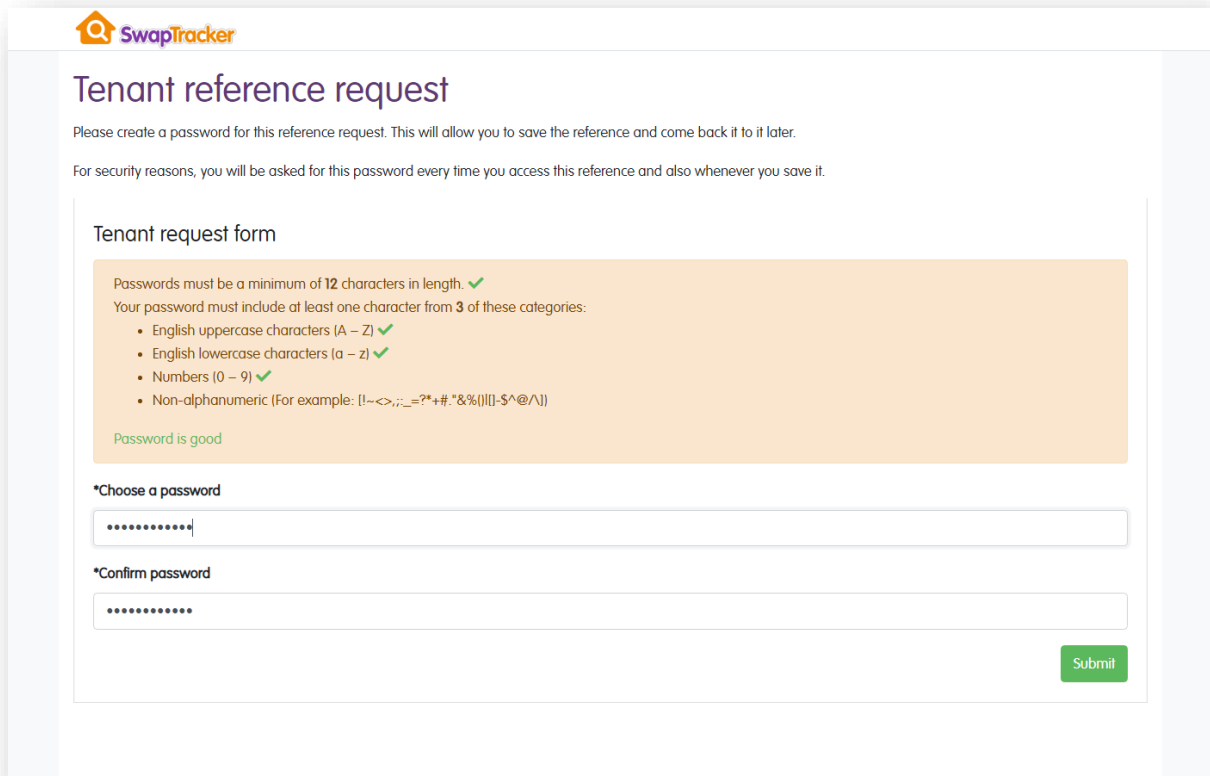
What the other landlord sees

After you've submitted a reference request, the landlord is sent an email giving them details of the exchange and the person(s) you require a reference for.

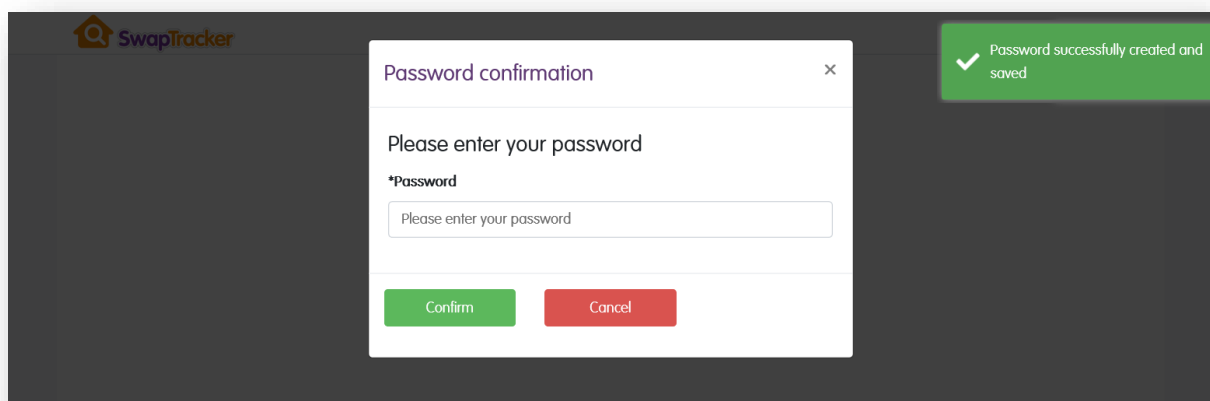


The email also contains a secure link which takes them to an online reference form.

The first thing they need to do is set a password for the reference.



This allows them to come back to it any time. They must enter the password whenever they return.



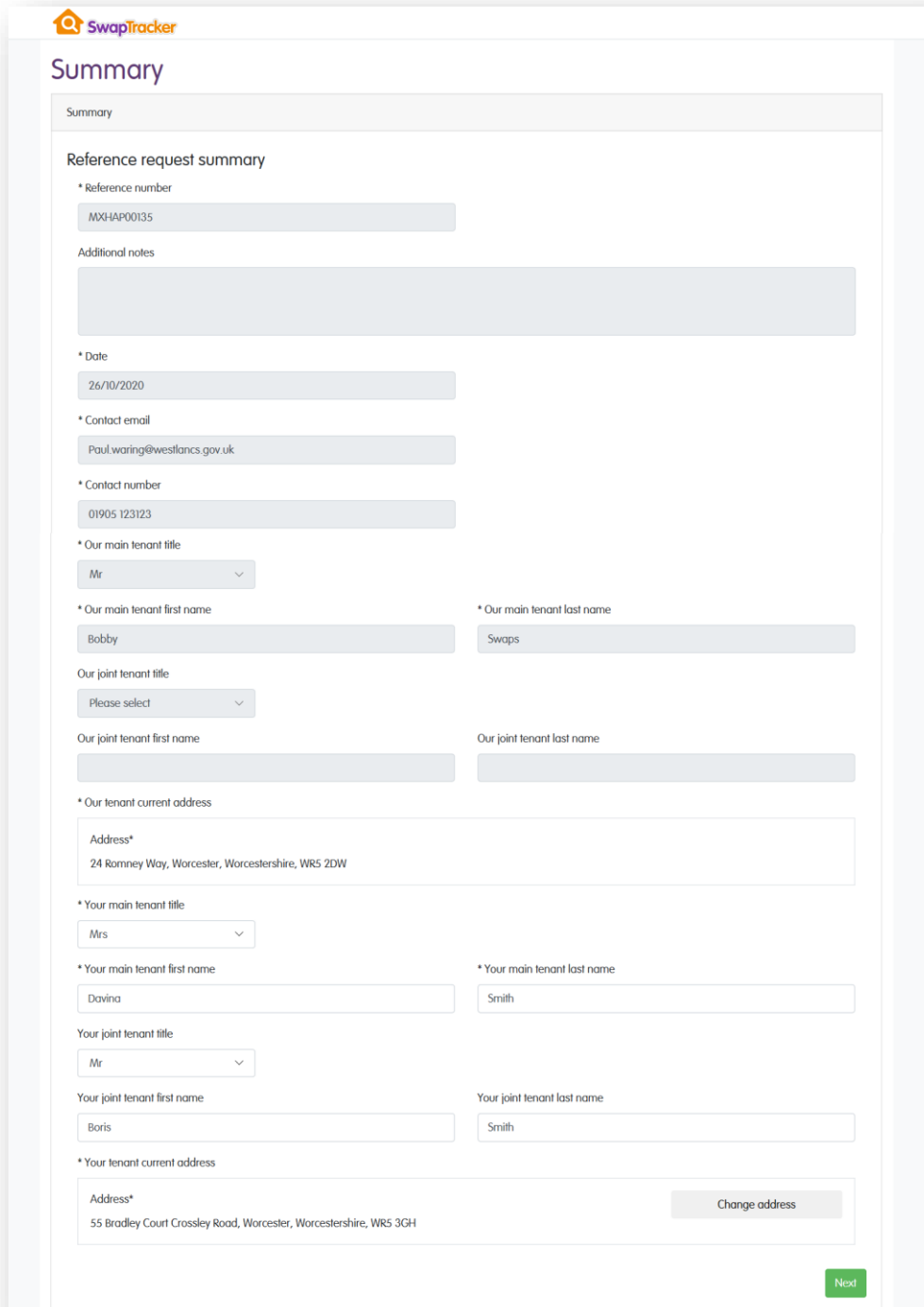
The reference form is made up of 6 sections. A full list of the questions asked can be found in [Appendix Two – Tenant Reference Form](#)

1. Reference Summary

The first page of the reference form gives an overview of the exchange.

Your details and the information about your tenant are read-only and cannot be changed.

The landlord can only update the information about their tenant(s).



The screenshot shows the 'Summary' page of the SwapTracker reference form. The page is titled 'Summary' and contains a 'Reference request summary' section. The form is divided into two main sections: 'Our tenant' and 'Your tenant'. Each section contains fields for title, first name, last name, and current address. The 'Our tenant' section is read-only, while the 'Your tenant' section has a 'Change address' button. A 'Next' button is located at the bottom right of the form.

Reference request summary

* Reference number
MXHAP00135

Additional notes

* Date
26/10/2020

* Contact email
Paul.waring@westlancs.gov.uk

* Contact number
01905 123123

* Our main tenant title
Mr

* Our main tenant first name
Bobby

* Our main tenant last name
Swaps

Our joint tenant title
Please select

Our joint tenant first name

Our joint tenant last name

* Our tenant current address
Address*
24 Romney Way, Worcester, Worcestershire, WR5 2DW

* Your main tenant title
Mrs

* Your main tenant first name
Davina

* Your main tenant last name
Smith

Your joint tenant title
Mr

Your joint tenant first name
Boris

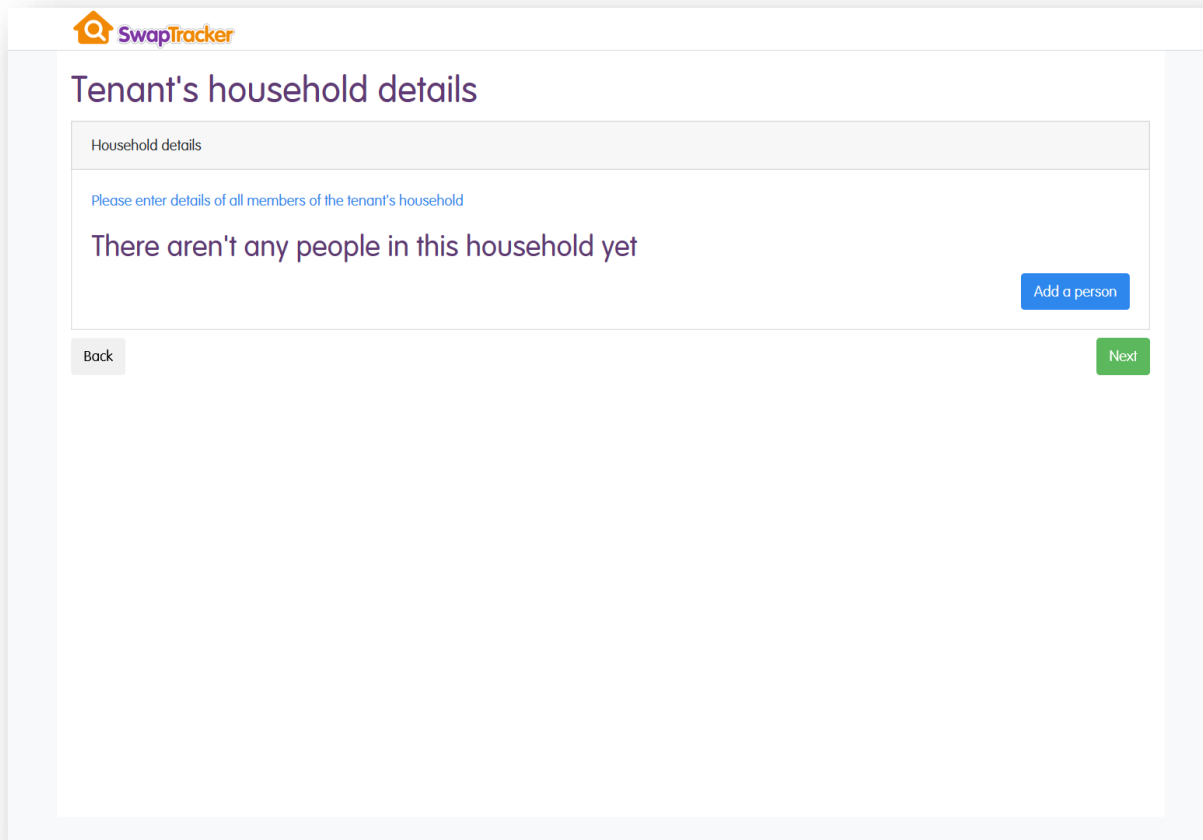
Your joint tenant last name
Smith

* Your tenant current address
Address*
55 Bradley Court Crossley Road, Worcester, Worcestershire, WR5 3GH
Change address

Next

2. Tenant's household details

This section captures details of their tenant's household, i.e. anyone who will be moving with them.



SwapTracker

Tenant's household details

Household details

Please enter details of all members of the tenant's household

There aren't any people in this household yet

Add a person

Back Next

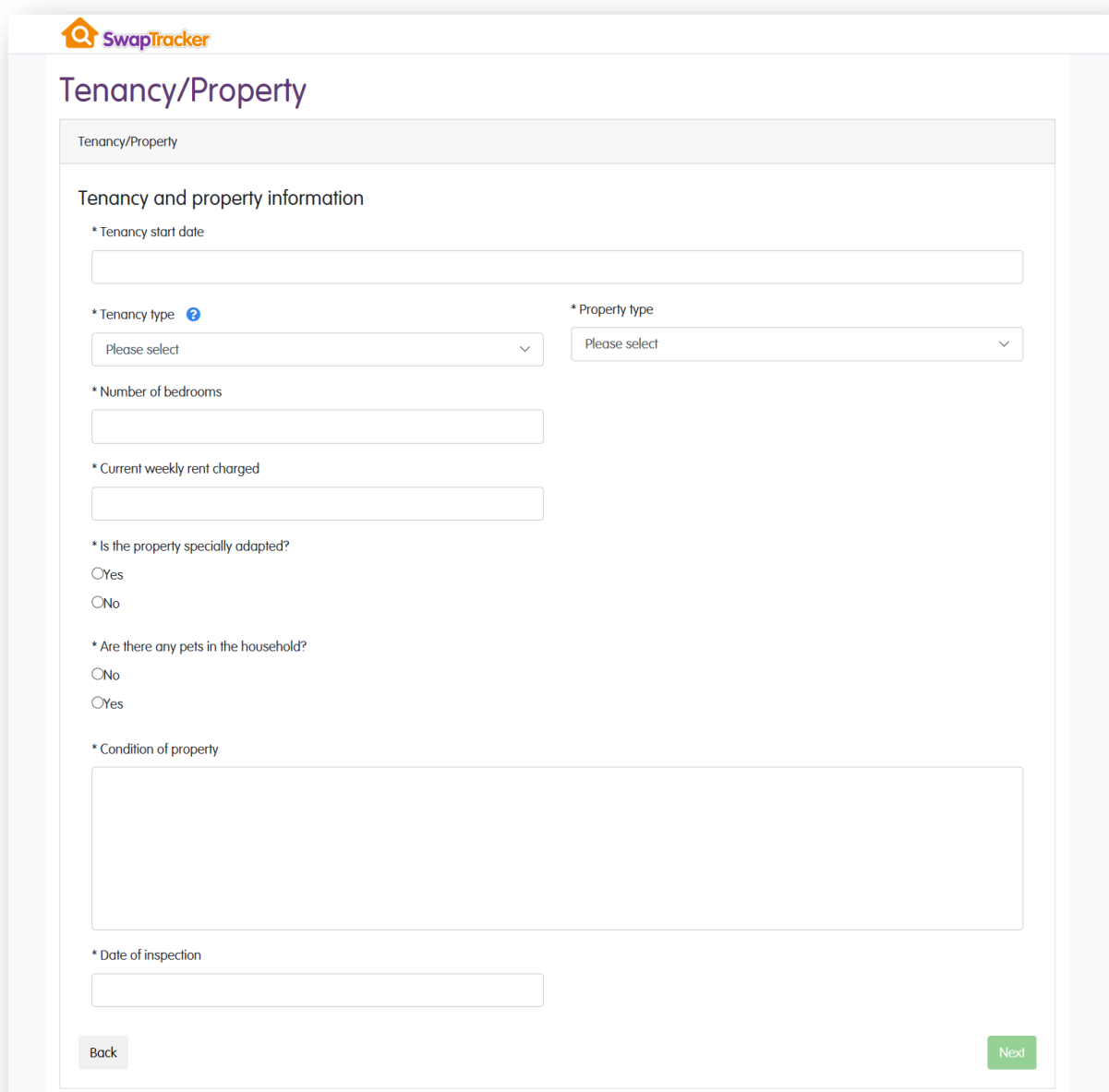


This section is optional and by default we do not ask for this information.

If you do want this as part of your reference request form, please contact Housing Partners.

3. Tenancy/Property

This section captures details about their tenant's current home and tenancy.



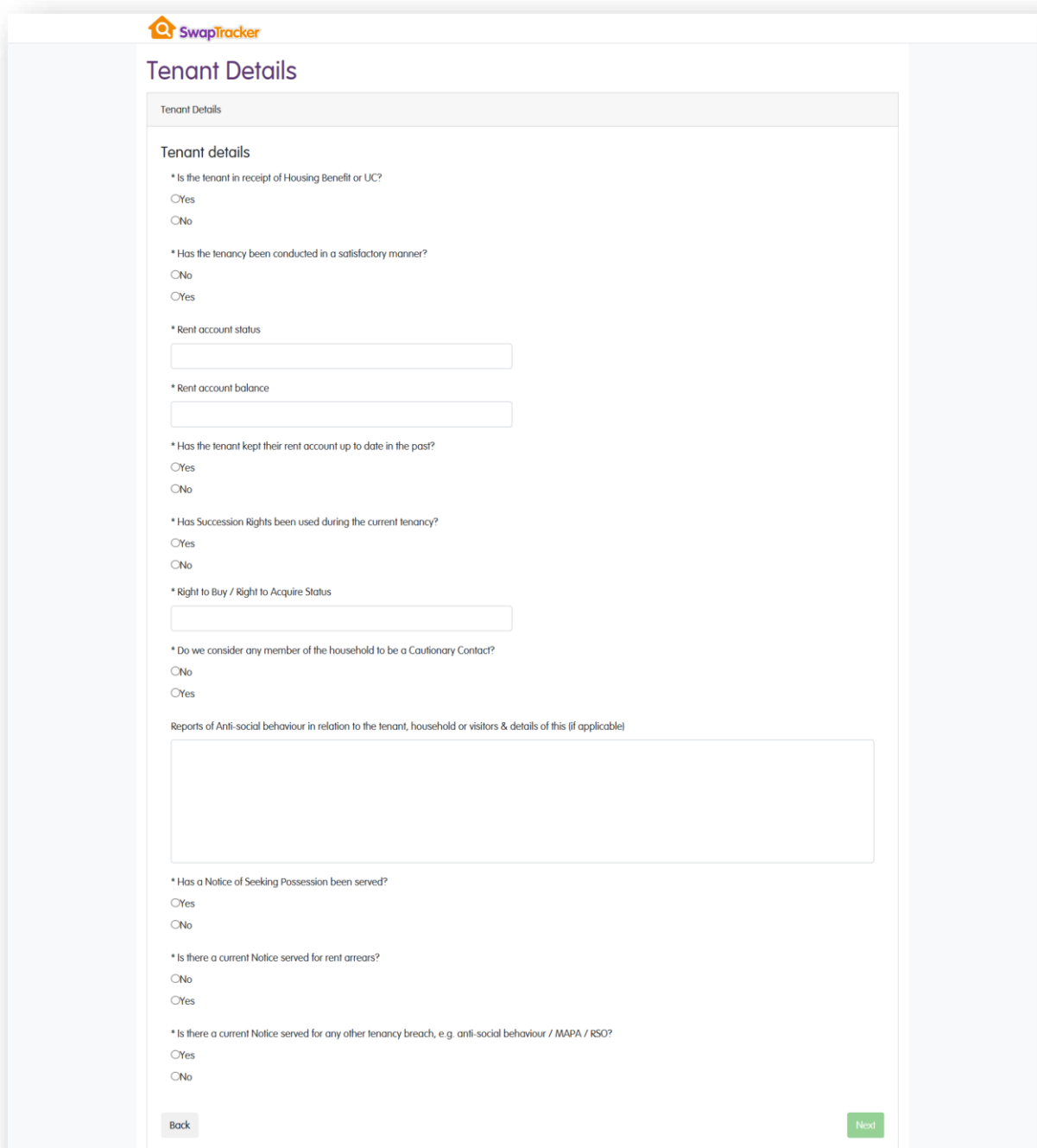
The screenshot shows the 'Tenancy/Property' form in the SwapTracker application. The form is titled 'Tenancy/Property' and contains the following fields and options:

- Tenancy start date:** A text input field.
- Tenancy type:** A dropdown menu with the placeholder text 'Please select'.
- Property type:** A dropdown menu with the placeholder text 'Please select'.
- Number of bedrooms:** A text input field.
- Current weekly rent charged:** A text input field.
- Is the property specially adapted?:** Radio buttons for 'Yes' and 'No'.
- Are there any pets in the household?:** Radio buttons for 'No' and 'Yes'.
- Condition of property:** A large text area for detailed input.
- Date of inspection:** A text input field.

At the bottom of the form, there are two buttons: 'Back' and 'Next'.

4. Tenant details

This section captures more details about their tenant.



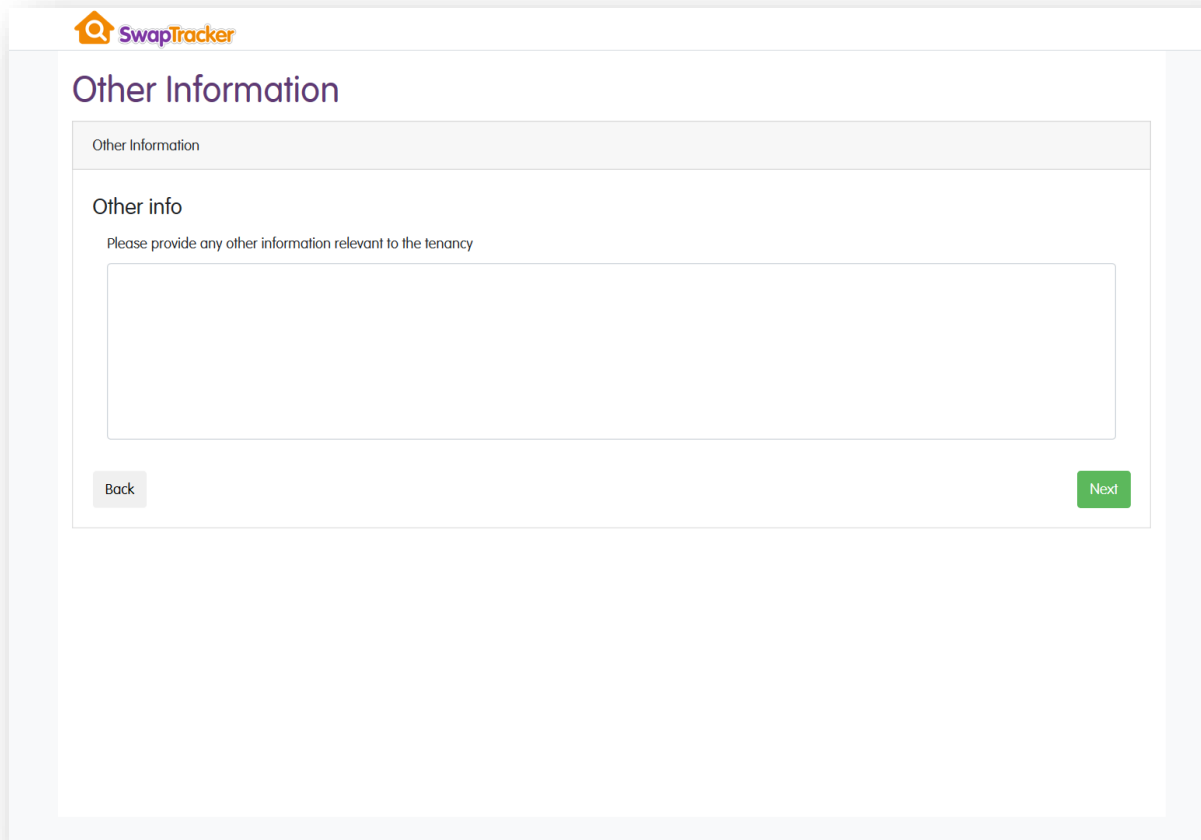
The screenshot shows the 'Tenant Details' form in the SwapTracker application. The form is titled 'Tenant Details' and contains several sections for data entry:

- Tenant details**
 - * Is the tenant in receipt of Housing Benefit or UC?
 - ☐ Yes
 - ☐ No
 - * Has the tenancy been conducted in a satisfactory manner?
 - ☐ No
 - ☐ Yes
 - * Rent account status
 - * Rent account balance
 - * Has the tenant kept their rent account up to date in the past?
 - ☐ Yes
 - ☐ No
 - * Has Succession Rights been used during the current tenancy?
 - ☐ Yes
 - ☐ No
 - * Right to Buy / Right to Acquire Status
 - * Do we consider any member of the household to be a Cautionary Contact?
 - ☐ No
 - ☐ Yes
- Reports of Anti-social behaviour in relation to the tenant, household or visitors & details of this (if applicable)**
- * Has a Notice of Seeking Possession been served?
 - ☐ Yes
 - ☐ No
- * Is there a current Notice served for rent arrears?
 - ☐ No
 - ☐ Yes
- * Is there a current Notice served for any other tenancy breach, e.g. anti-social behaviour / MAPA / RSO?
 - ☐ Yes
 - ☐ No

At the bottom of the form, there are two buttons: 'Back' and 'Next'.

5. Other information

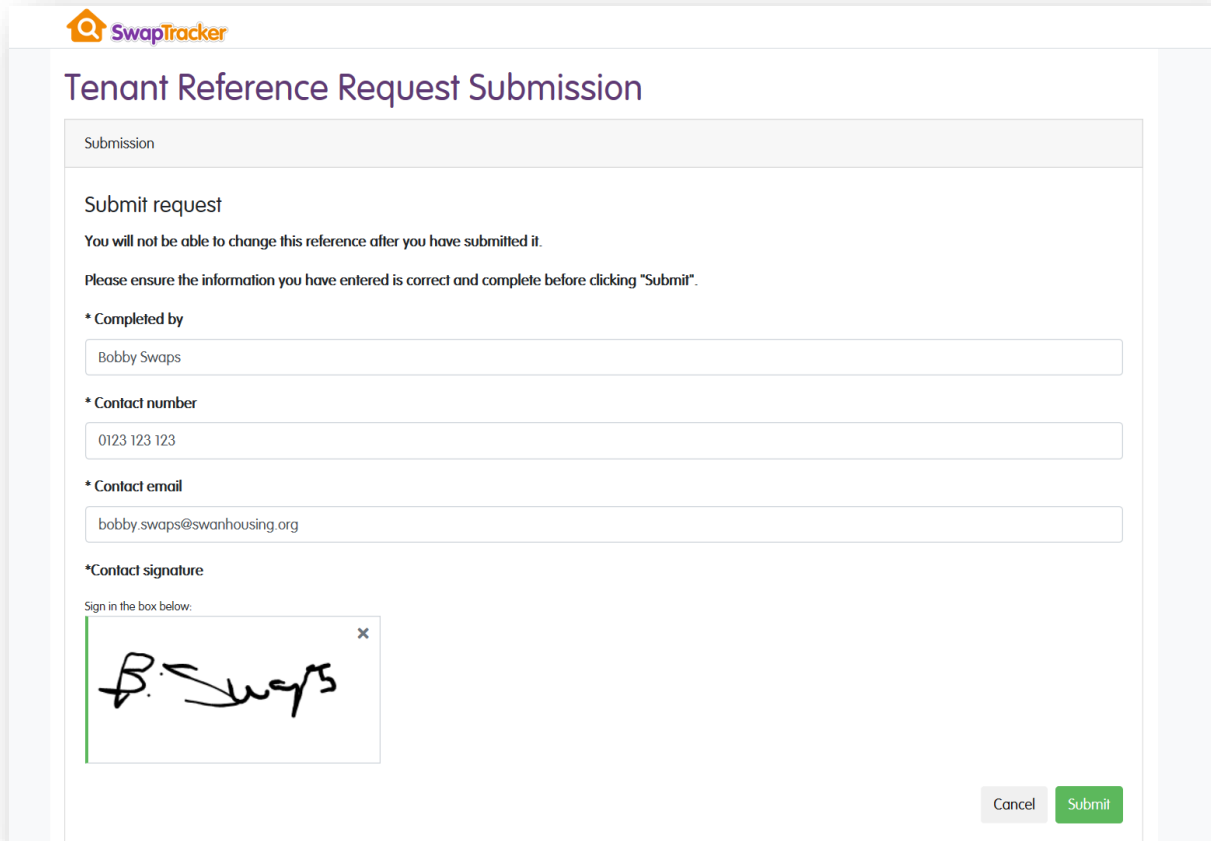
This section allows the landlord to enter any additional information about their tenant they believe may be relevant. This is optional.



The screenshot shows the 'Other Information' section of the SwapTracker interface. At the top left is the SwapTracker logo. Below it is the title 'Other Information' in a purple font. Underneath is a light gray header bar with the text 'Other Information'. The main content area is titled 'Other info' and contains the instruction 'Please provide any other information relevant to the tenancy'. Below this is a large, empty rectangular text input field. At the bottom of the form are two buttons: a gray 'Back' button on the left and a green 'Next' button on the right.

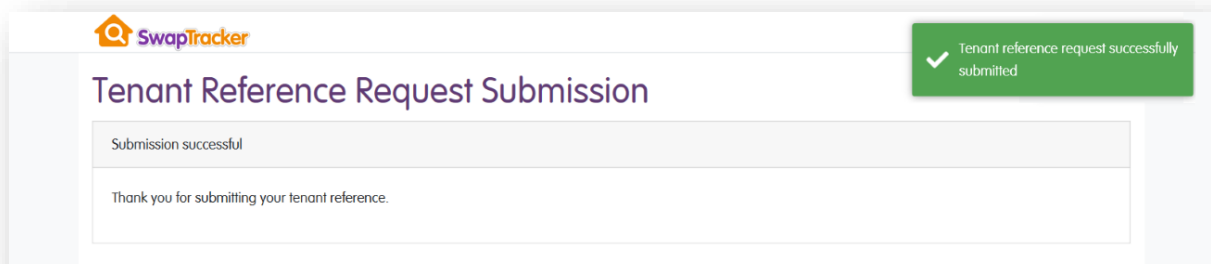
6. Tenant reference request submission

On the final page of the reference the landlord provides details of who completed the reference (including contact information) and signs the form.



The screenshot shows the 'Tenant Reference Request Submission' page in the SwapTracker application. The page has a header with the SwapTracker logo and the title 'Tenant Reference Request Submission'. Below the title is a section titled 'Submission' with a sub-header 'Submit request'. The text states: 'You will not be able to change this reference after you have submitted it. Please ensure the information you have entered is correct and complete before clicking "Submit".' There are four required fields marked with an asterisk: '* Completed by' (filled with 'Bobby Swaps'), '* Contact number' (filled with '0123 123 123'), '* Contact email' (filled with 'bobby.swaps@swanhousing.org'), and '* Contact signature' (with a signature box containing a handwritten signature 'B. Swaps'). At the bottom right are 'Cancel' and 'Submit' buttons.

Clicking "Submit" will now lock the reference (to avoid any changes being made after it has been submitted back to you) and a "Thank You" message is shown.

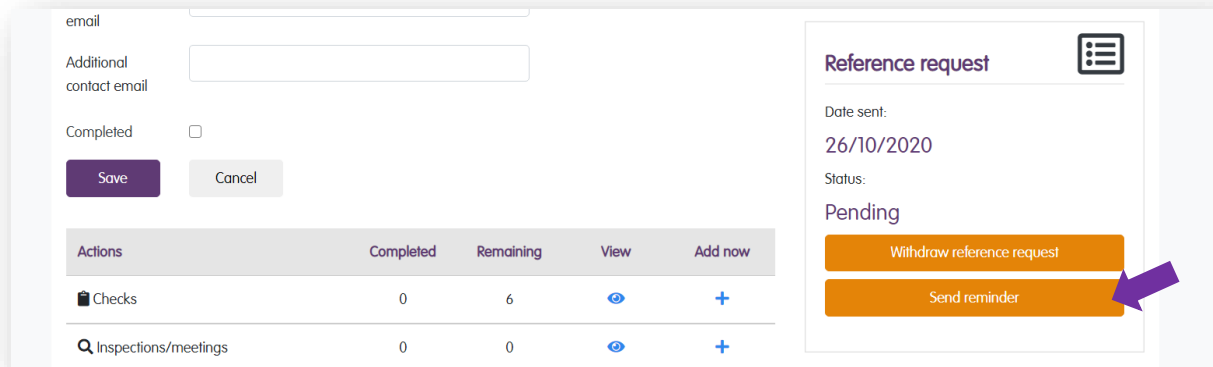


The screenshot shows the success page after submission. It features a green notification box in the top right corner with a checkmark and the text 'Tenant reference request successfully submitted'. The main heading is 'Tenant Reference Request Submission'. Below it is a section titled 'Submission successful' with the message 'Thank you for submitting your tenant reference.'

Sending a reminder

If it's been a while since you requested a reference, you may want to send a polite reminder.

You can do this by clicking the “*Send reminder*” button.



The screenshot shows the SwapTracker interface. On the left, there's a form with fields for 'email', 'Additional contact email', and a 'Completed' checkbox. Below the form are 'Save' and 'Cancel' buttons. In the center, there's a table with columns: Actions, Completed, Remaining, View, and Add now. The table has two rows: 'Checks' (0 Completed, 6 Remaining) and 'Inspections/meetings' (0 Completed, 0 Remaining). On the right, there's a 'Reference request' section with a 'Date sent' of 26/10/2020 and a 'Status' of Pending. Below this are two buttons: 'Withdraw reference request' and 'Send reminder'. A purple arrow points to the 'Send reminder' button.

Actions	Completed	Remaining	View	Add now
Checks	0	6		+
Inspections/meetings	0	0		+

Reference request

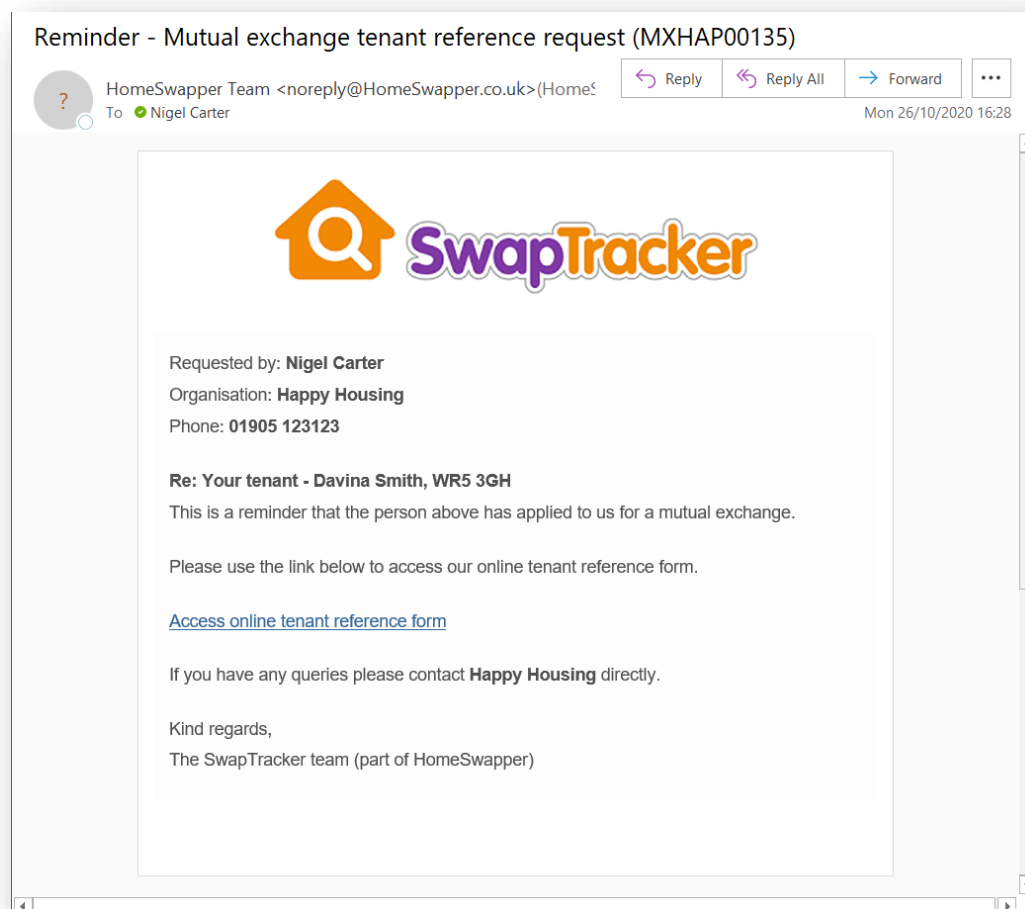
Date sent: 26/10/2020

Status: Pending

[Withdraw reference request](#)

[Send reminder](#)


Doing this sends an email to the landlord reminding them of the reference request and includes another link to the form just in case.



The screenshot shows an email reminder from the HomeSwapper Team to Nigel Carter. The email subject is 'Reminder - Mutual exchange tenant reference request (MXHAP00135)'. The email body contains the SwapTracker logo, the requested by (Nigel Carter), organisation (Happy Housing), and phone number (01905 123123). It also includes the subject 'Re: Your tenant - Davina Smith, WR5 3GH' and a reminder that the person above has applied for a mutual exchange. A link to 'Access online tenant reference form' is provided. The email ends with a sign-off from the SwapTracker team (part of HomeSwapper).

Reminder - Mutual exchange tenant reference request (MXHAP00135)

HomeSwapper Team <noreply@HomeSwapper.co.uk> (HomeSwapper) To: Nigel Carter Mon 26/10/2020 16:28



Requested by: **Nigel Carter**
 Organisation: **Happy Housing**
 Phone: **01905 123123**

Re: Your tenant - Davina Smith, WR5 3GH

This is a reminder that the person above has applied to us for a mutual exchange.

Please use the link below to access our online tenant reference form.

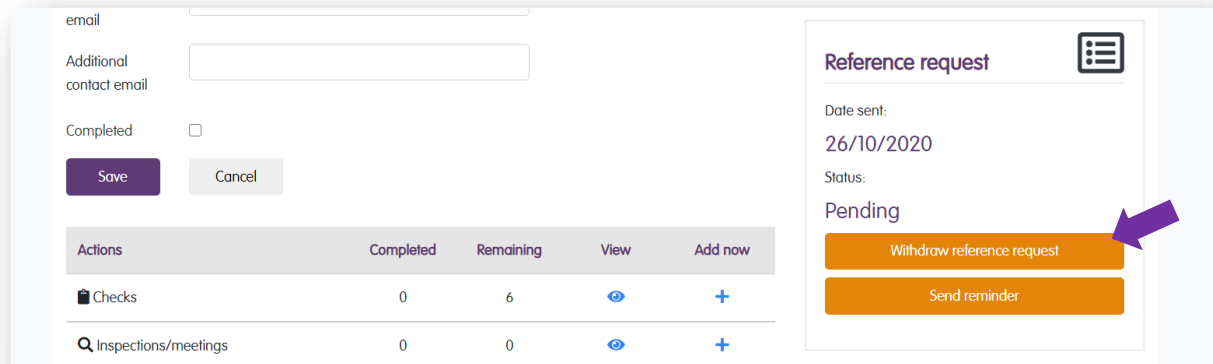
[Access online tenant reference form](#)

If you have any queries please contact **Happy Housing** directly.

Kind regards,
 The SwapTracker team (part of HomeSwapper)

Withdrawing a reference request

If you need to withdraw a reference request, click the “*Withdraw reference request*” button.



email

Additional contact email

Completed ☐

Save Cancel

Actions	Completed	Remaining	View	Add now
Checks	0	6	View	+
Inspections/meetings	0	0	View	+

Reference request

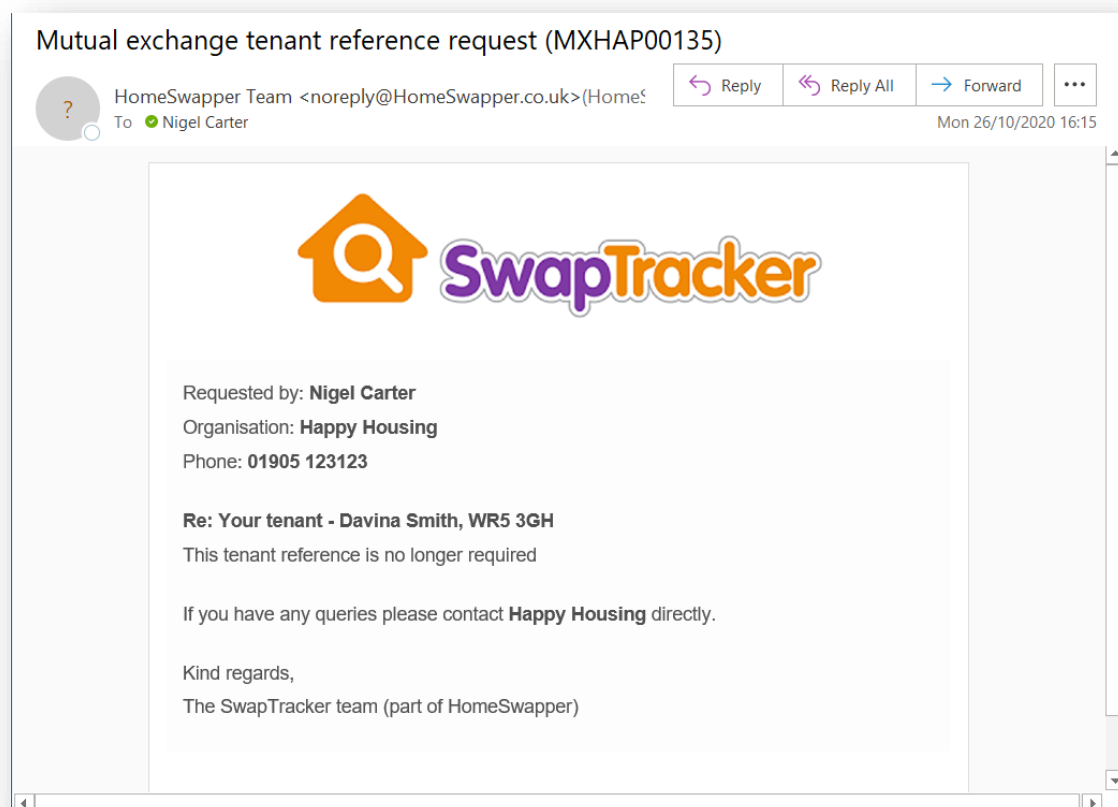
Date sent:
26/10/2020

Status:
Pending

Withdraw reference request

Send reminder

Doing this sends an email to the landlord informing them that the reference is no longer required.



Mutual exchange tenant reference request (MXHAP00135)

HomeSwapper Team <noreply@HomeSwapper.co.uk> (HomeSwapper)

To: Nigel Carter

Mon 26/10/2020 16:15

Reply Reply All Forward ...

SwapTracker

Requested by: **Nigel Carter**
 Organisation: **Happy Housing**
 Phone: **01905 123123**

Re: Your tenant - Davina Smith, WR5 3GH
 This tenant reference is no longer required

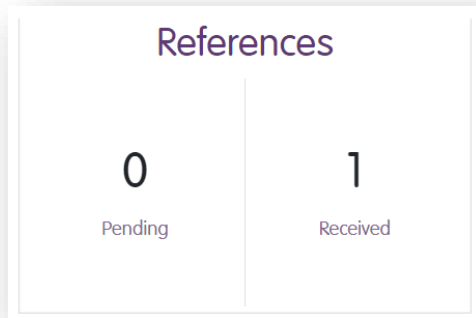
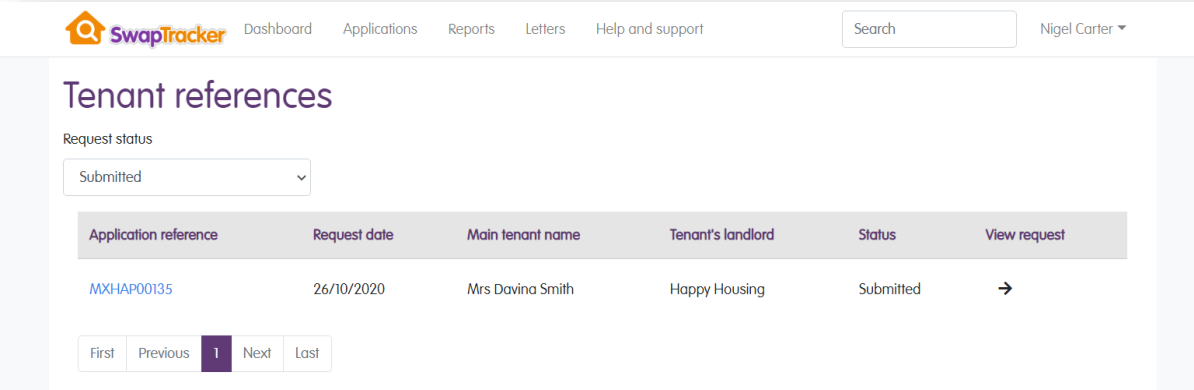
If you have any queries please contact **Happy Housing** directly.

Kind regards,
 The SwapTracker team (part of HomeSwapper)

Reviewing a submitted request

After a landlord has completed a reference and submitted it, a notification is sent to the contact email addresses for that application, letting you know it's ready to view.

You can access a list of references you have received by clicking the “Received” total on the References section of your Dashboard.

SwapTracker Dashboard Applications Reports Letters Help and support Search Nigel Carter ▼

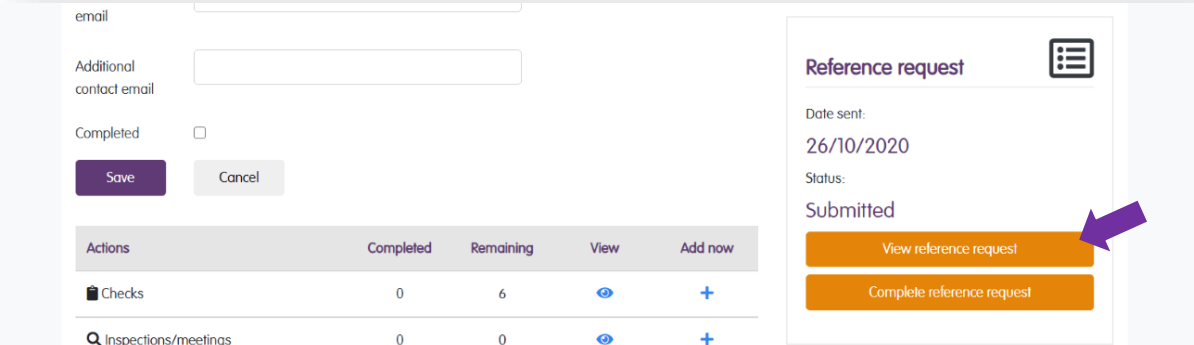
Tenant references

Request status: Submitted ▼

Application reference	Request date	Main tenant name	Tenant's landlord	Status	View request
MXHAP00135	26/10/2020	Mrs Davina Smith	Happy Housing	Submitted	→

First Previous 1 Next Last

To look at the reference they've provided, simply click on the “View reference request” button.



email

Additional contact email

Completed ☐

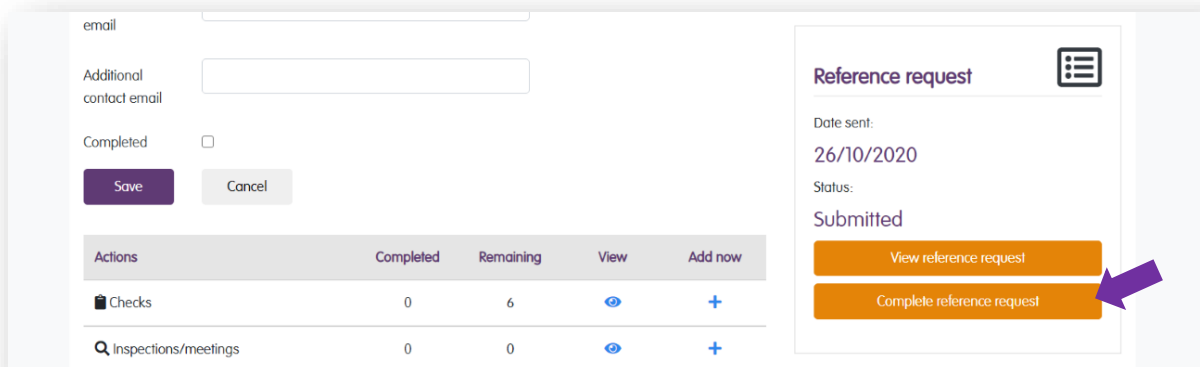
Actions	Completed	Remaining	View	Add now
Checks	0	6	View	+
Inspections/meetings	0	0	View	+

Reference request

Date sent: 26/10/2020

Status: Submitted

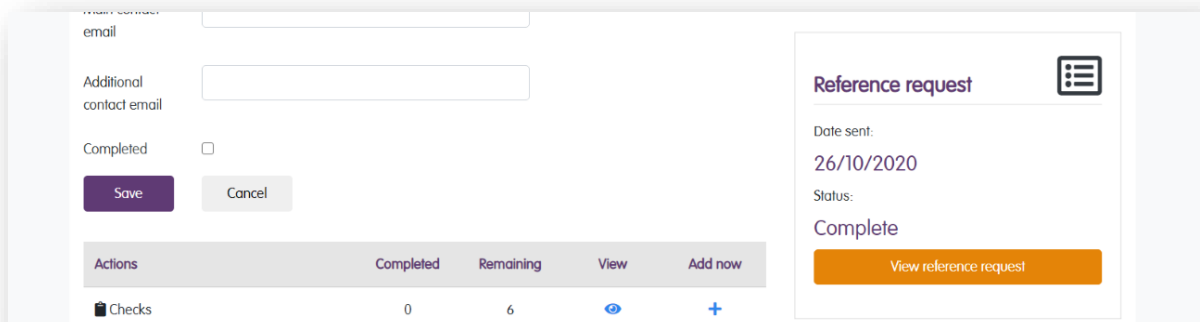
After reviewing the reference, click the “*Complete reference request*” button.



The screenshot shows a form for creating a reference request. On the left, there are input fields for 'email' and 'Additional contact email', a 'Completed' checkbox, and 'Save' and 'Cancel' buttons. Below this is a table with columns: Actions, Completed, Remaining, View, and Add now. The table has two rows: 'Checks' with 0 Completed and 6 Remaining, and 'Inspections/meetings' with 0 Completed and 0 Remaining. On the right, there is a 'Reference request' panel showing 'Date sent: 26/10/2020' and 'Status: Submitted'. At the bottom of this panel are two orange buttons: 'View reference request' and 'Complete reference request'. A red arrow points to the 'Complete reference request' button.

Actions	Completed	Remaining	View	Add now
Checks	0	6		+
Inspections/meetings	0	0		+

This is good housekeeping, because it will set the reference request to “*Complete*” and remove it from your “*Received*” total on your dashboard.



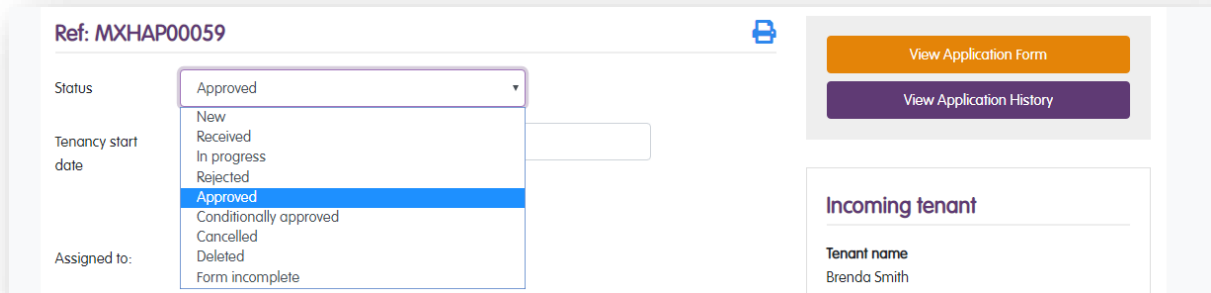
This screenshot shows the same form as the previous one, but the status of the reference request has changed to 'Complete'. The 'Complete reference request' button is no longer visible, and the 'View reference request' button is now the only orange button at the bottom of the 'Reference request' panel. The 'Status' field now displays 'Complete'.

After setting the reference request to “*Complete*”, you can still view the reference at any time by clicking the “*View reference request*” button.

DECISIONS

Approving an application

To set an application to “Approved” simply select that status from the list and click “Save”.



Ref: MXHAP00059

Status: Approved

Tenancy start date:

Assigned to:

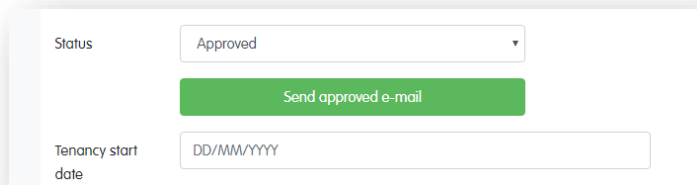
[View Application Form](#)

[View Application History](#)

Incoming tenant

Tenant name: Brenda Smith

A box to enter a Tenancy Start Date will then be shown. This can be entered at any time once the date has been agreed.

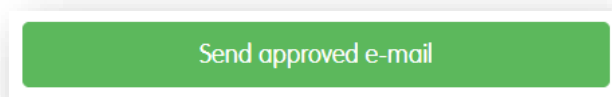


Status: Approved

[Send approved e-mail](#)

Tenancy start date: DD/MM/YYYY

A button to send an Approval email to the tenant will also be displayed.



[Send approved e-mail](#)

Note: An Approval email is not automatically sent out when the status of the application is changed.

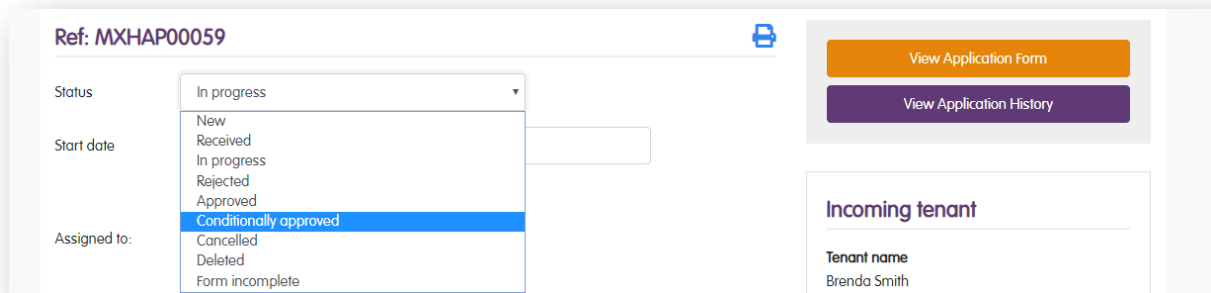
This is a manual process. For example, you would not want an email being sent to the tenant if the status had been selected by mistake.

An Approval letter can be created – see [Creating Letters](#)

Important: the tenant will still be able to access their SwapTracker dashboard to view progress, see documents, etc, until you set the application to “Complete” – see [Setting an Application to Complete](#)

Conditionally Approving an application

To set an application to “Conditionally Approved” simply select that status from the list.



Ref: MXHAP00059

Status: In progress (dropdown menu open showing: New, Received, In progress, Rejected, Approved, **Conditionally approved**, Cancelled, Deleted, Form incomplete)

Start date: [text box]

Assigned to: [text box]

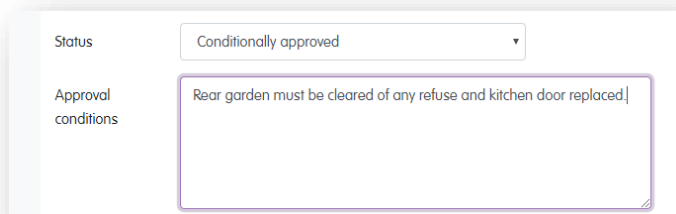
View Application Form (button)

View Application History (button)

Incoming tenant

Tenant name: Brenda Smith

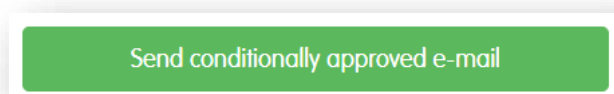
You will then be prompted to enter details of the related “Approval conditions”.



Status: Conditionally approved

Approval conditions: Rear garden must be cleared of any refuse and kitchen door replaced.

When the application is saved, a button to send a Conditional Approval email to the tenant will be displayed.



Send conditionally approved e-mail (button)

Note: A Conditional Approval email is not automatically sent out when the status of the application is changed.

This is a manual process. For example, you would not want an email being sent to the tenant if the status had been selected by mistake.

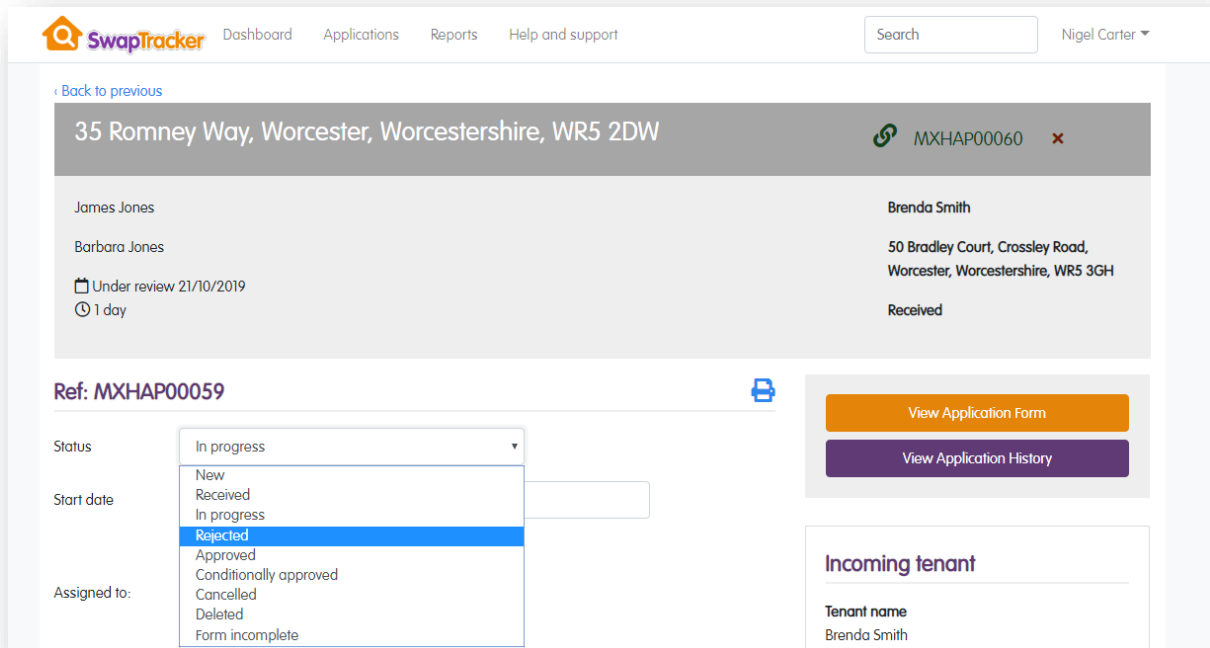
A box to enter a Tenancy Start Date will then be shown. This can be entered at any time once the date has been agreed.

A Conditional Approval letter can be created – see [Creating Letters](#)

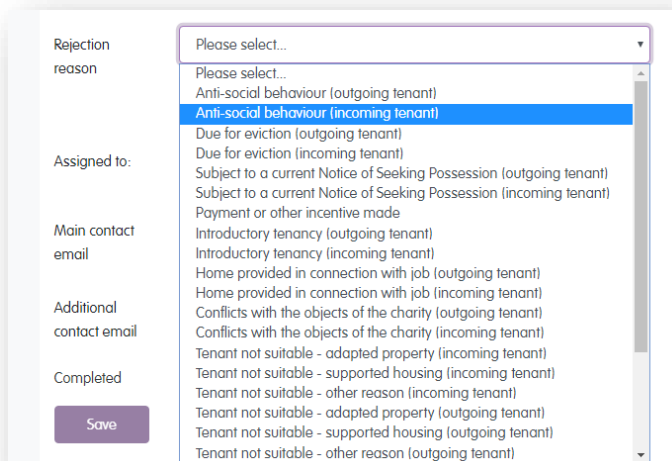
Important: the tenant will still be able to access their SwapTracker dashboard to view progress (including the approval conditions you have stated), see documents, etc, until you set the application to “Complete” – see [Setting an Application to Complete](#)

Refusing an application

To set an application to “Rejected” simply select that status from the list.



You will then be prompted to give a Rejection reason.



You can either select a standard reason from the list or select “Other (please specify)” and enter your own reason in the text box provided.

Status	Rejected
Rejection reason	Other (please specify)
Rejection reason (other)	Other reason can be entered here!

When the application is saved, a button to send a Rejection email to the tenant will be displayed.

Send rejected e-mail

Note: A Rejection email is not automatically sent out when the status of the application is changed.

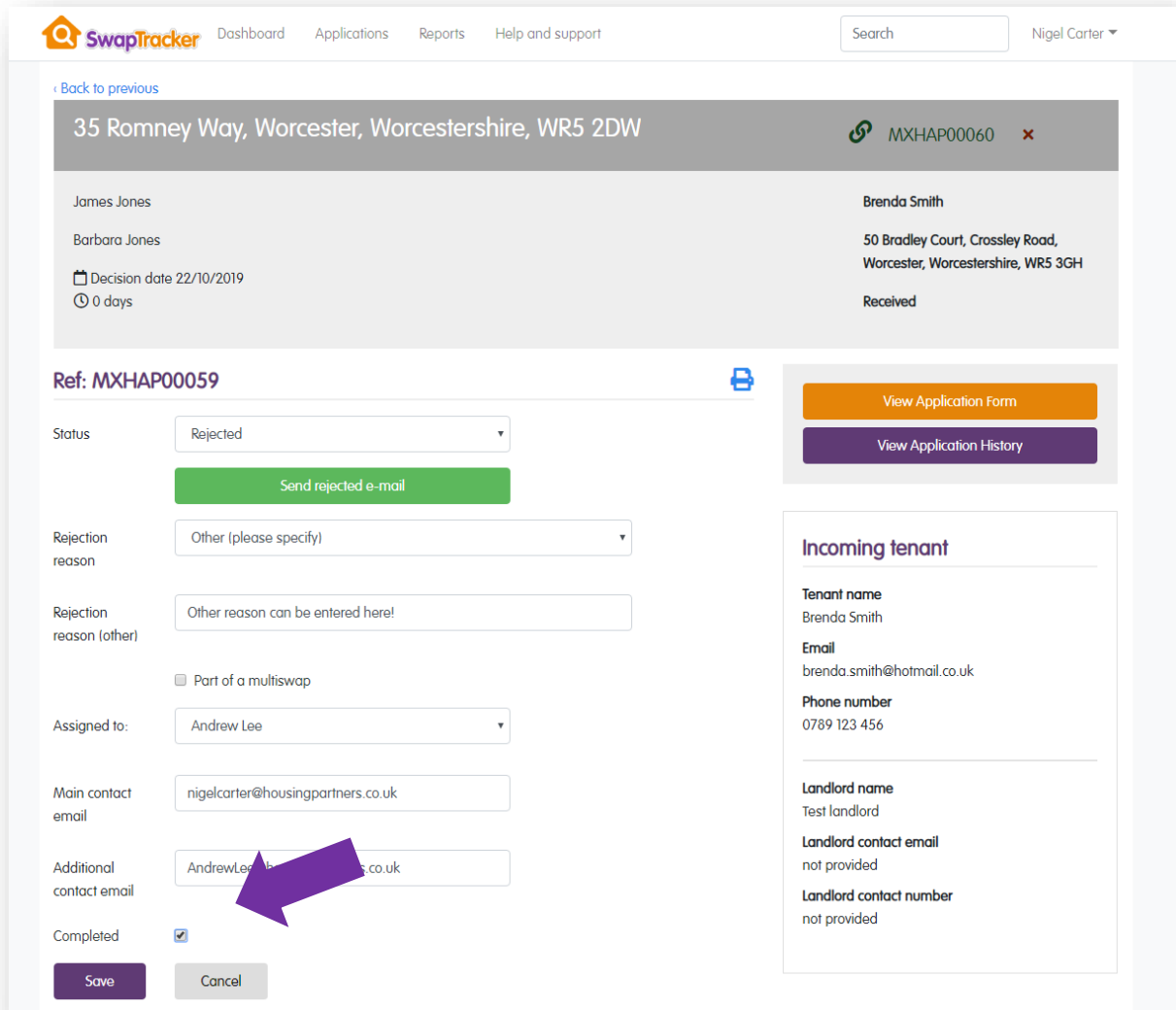
This is a manual process. For example, you would not want an email being sent to the tenant if the status had been selected by mistake.

A Rejected letter can be created – see [Creating Letters](#)

Important: when an application is set to “Rejected” the tenant is no longer able to access their SwapTracker dashboard for that application.

SETTING AN APPLICATION TO COMPLETE

When you are ready to set an application to complete (e.g. the decisions have been made and the tenancies signed-up) simply tick the “*Completed*” box at the bottom of the Application Summary page and click “*Save*”.



SwapTracker Dashboard Applications Reports Help and support Search Nigel Carter ▼

[Back to previous](#)

35 Romney Way, Worcester, Worcestershire, WR5 2DW MXHAP00060 ✕

James Jones
Barbara Jones
Decision date 22/10/2019
0 days

Brenda Smith
50 Bradley Court, Crossley Road,
Worcester, Worcestershire, WR5 3GH
Received

Ref: MXHAP00059

Status: Rejected
Send rejected e-mail

Rejection reason: Other (please specify)
Other reason can be entered here!

☐ Part of a multiswap

Assigned to: Andrew Lee

Main contact email: nigelcarter@housingpartners.co.uk

Additional contact email: AndrewLee@housingpartners.co.uk

Completed: ☒

Save Cancel

View Application Form
View Application History

Incoming tenant

Tenant name: Brenda Smith
Email: brenda.smith@hotmail.co.uk
Phone number: 0789 123 456

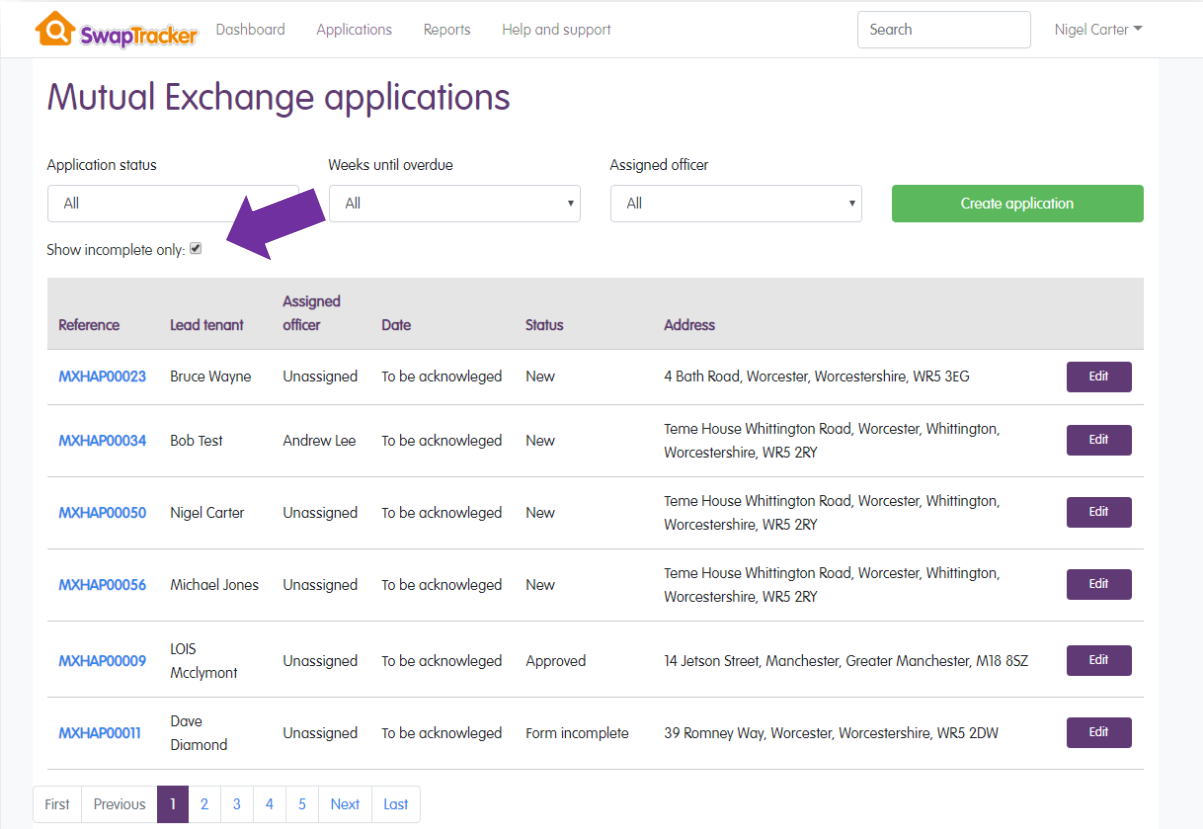
Landlord name: Test landlord
Landlord contact email: not provided
Landlord contact number: not provided

By default, applications that been set to “Complete” are not shown in the list of applications (or included in your Dashboard totals).

This is a convenient way of marking applications as not requiring anything more to be done on them so you can concentrate on only your active applications in SwapTracker.

Important: if the application was “Approved” or “Conditionally approved”, the tenant can continue to access their SwapTracker dashboard until you set their application to “Complete”. When this is done, they cannot access their dashboard and if their HomeSwapper account is set to “Swapped”.

If you do want to include complete applications in any list, un-tick the “*Show incomplete only*” tick box.



The screenshot shows the 'Mutual Exchange applications' page in the SwapTracker system. The page includes a navigation bar with 'Dashboard', 'Applications', 'Reports', and 'Help and support'. A search bar and a user profile 'Nigel Carter' are also present. The main section has filters for 'Application status' (set to 'All'), 'Weeks until overdue' (set to 'All'), and 'Assigned officer' (set to 'All'). A green 'Create application' button is on the right. Below the filters, the 'Show incomplete only' checkbox is checked, and a purple arrow points to it. The table below lists six applications with columns for Reference, Lead tenant, Assigned officer, Date, Status, and Address. Each row has an 'Edit' button. The pagination bar at the bottom shows 'First', 'Previous', '1', '2', '3', '4', '5', 'Next', and 'Last'.









Reference	Lead tenant	Assigned officer	Date	Status	Address	
MX-HAP00023	Bruce Wayne	Unassigned	To be acknowledged	New	4 Bath Road, Worcester, Worcestershire, WR5 3EG	Edit
MX-HAP00034	Bob Test	Andrew Lee	To be acknowledged	New	Teme House Whittington Road, Worcester, Whittington, Worcestershire, WR5 2RY	Edit
MX-HAP00050	Nigel Carter	Unassigned	To be acknowledged	New	Teme House Whittington Road, Worcester, Whittington, Worcestershire, WR5 2RY	Edit
MX-HAP00056	Michael Jones	Unassigned	To be acknowledged	New	Teme House Whittington Road, Worcester, Whittington, Worcestershire, WR5 2RY	Edit
MX-HAP00009	LOIS McClymont	Unassigned	To be acknowledged	Approved	14 Jetson Street, Manchester, Greater Manchester, M18 8SZ	Edit
MX-HAP00011	Dave Diamond	Unassigned	To be acknowledged	Form incomplete	39 Romney Way, Worcester, Worcestershire, WR5 2DW	Edit

First Previous **1** 2 3 4 5 Next Last

LETTERS

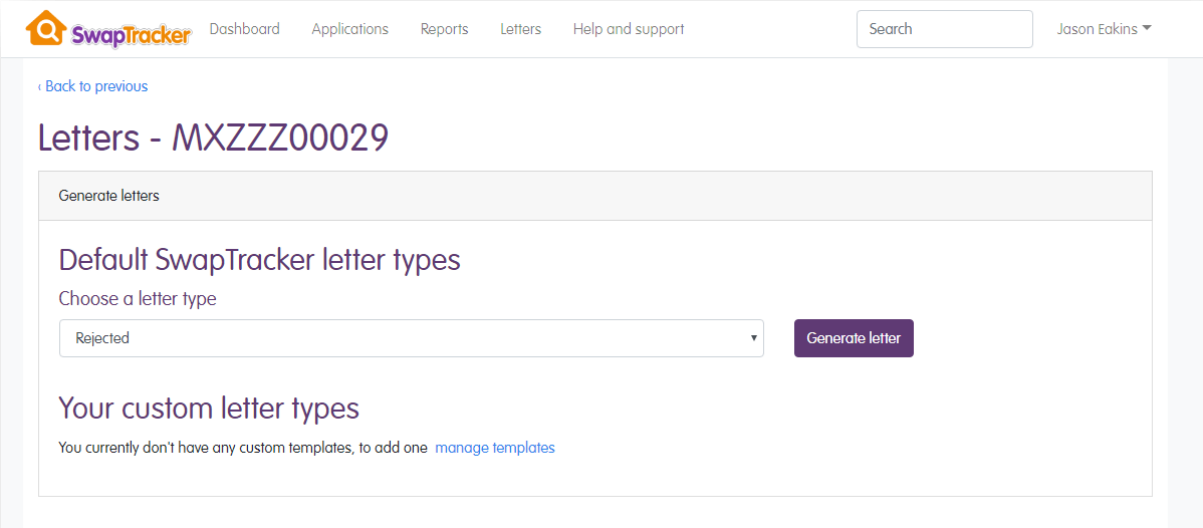
Creating letters for an application

Letters can be created for an application by clicking the “+” (Add now) icon on the Application Summary page:

Documents	Total	View	Add now
 Documents received	1		+
 Documents requested	1		+
 Notes	1		+
 Letters			+

You can either select from the default SwapTracker letters (approval, conditional approval and rejected) or use one of your own.

For more details on adding your own templates or amending the default ones, please refer to [Letter Templates](#)



SwapTracker Dashboard Applications Reports Letters Help and support Search Jason Eakins ▾

[Back to previous](#)

Letters - MXZZZ00029

Generate letters

Default SwapTracker letter types

Choose a letter type

Rejected ▾ [Generate letter](#)

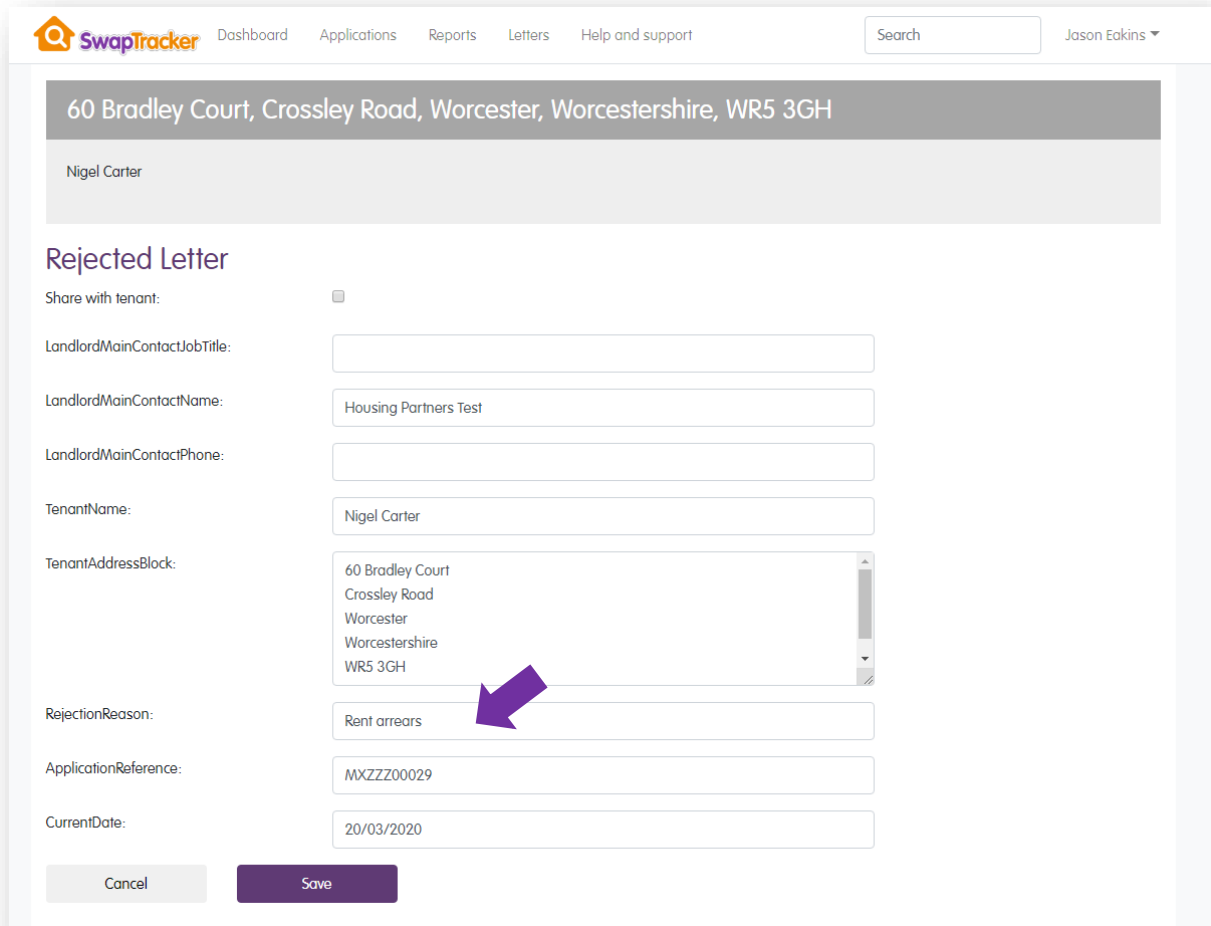
Your custom letter types

You currently don't have any custom templates, to add one [manage templates](#)

For example, selecting the “*Rejected*” letter type and clicking “*Generate letter*” takes you to a page showing all the “merge fields” for that letter.

Wherever possible these fields will be pre-populated from the application you are creating the letter for.

However, you can still amend any of these fields on this page before creating the letter, e.g. in this instance you might want to add some more information to the rejection reason that will be shown in the letter:



60 Bradley Court, Crossley Road, Worcester, Worcestershire, WR5 3GH

Nigel Carter

Rejected Letter

Share with tenant: ☐

LandlordMainContactJobTitle:

LandlordMainContactName:

LandlordMainContactPhone:

TenantName:

TenantAddressBlock:

RejectionReason:

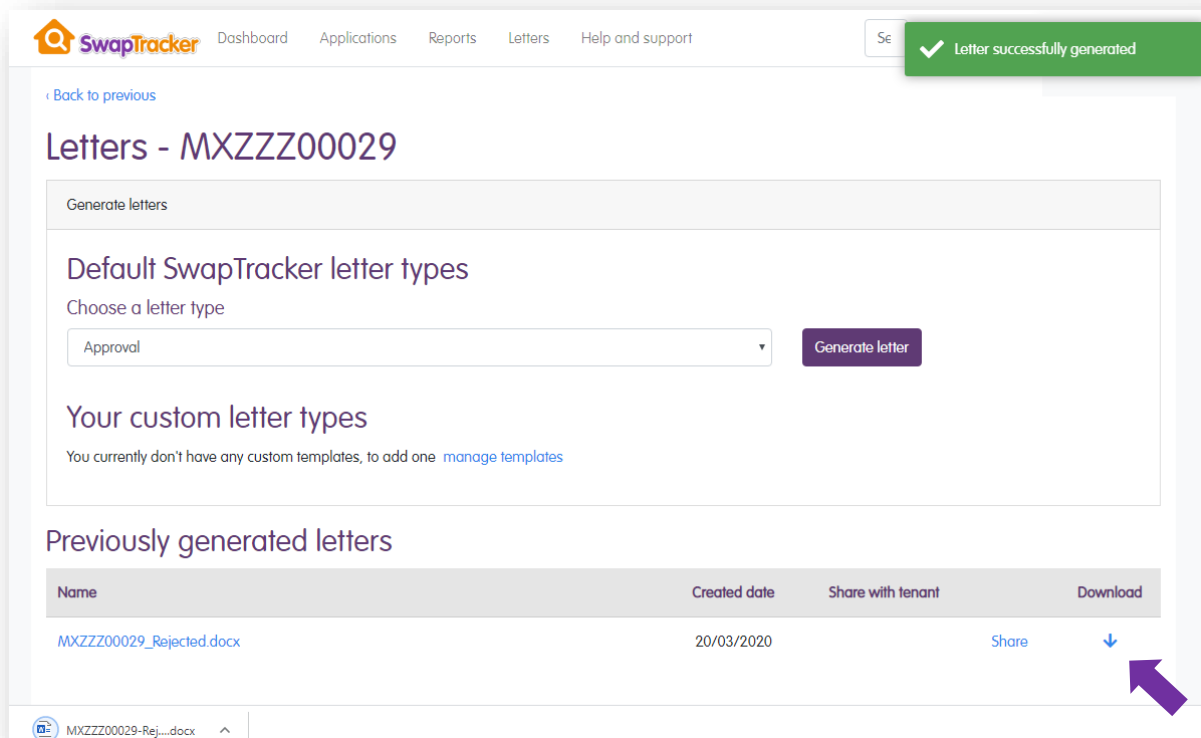
ApplicationReference:

CurrentDate:


Clicking “Save” creates a Microsoft Word letter using the template and these merge field values.

The letter created is stored against the application.

Click the “Download” arrow to view the letter, print it, etc.



The screenshot shows the SwapTracker interface. At the top, there's a navigation bar with links: Dashboard, Applications, Reports, Letters, and Help and support. A green notification banner at the top right says "Letter successfully generated". Below the navigation bar, there's a "Back to previous" link. The main heading is "Letters - MXZZZ00029". Underneath, there's a "Generate letters" section with a dropdown menu set to "Approval" and a "Generate letter" button. Below that, a section titled "Your custom letter types" states that no custom templates are currently added, with a link to "manage templates". The bottom section, "Previously generated letters", contains a table:

Name	Created date	Share with tenant	Download
MXZZZ00029_Rejected.docx	20/03/2020	Share	

A purple arrow points to the download arrow icon in the table.

As you can see from the example of a “Rejected” letter below, the template automatically pulls in the relevant details for that application, e.g. tenant name, address, and reason for refusal.

Your organisation’s logo is also included.



Nigel Carter
60 Bradley Court
Crossley Road
Worcester
Worcestershire
WR5 3GH

Date: 20/03/2020
Our ref: MXZZZ00029

Dear Nigel Carter,

RE: Mutual Exchange Application – Refusal

We have now considered your recent application for a mutual exchange. I am sorry to advise that we have to refuse your request. The reason for our decision is:

Rent arrears

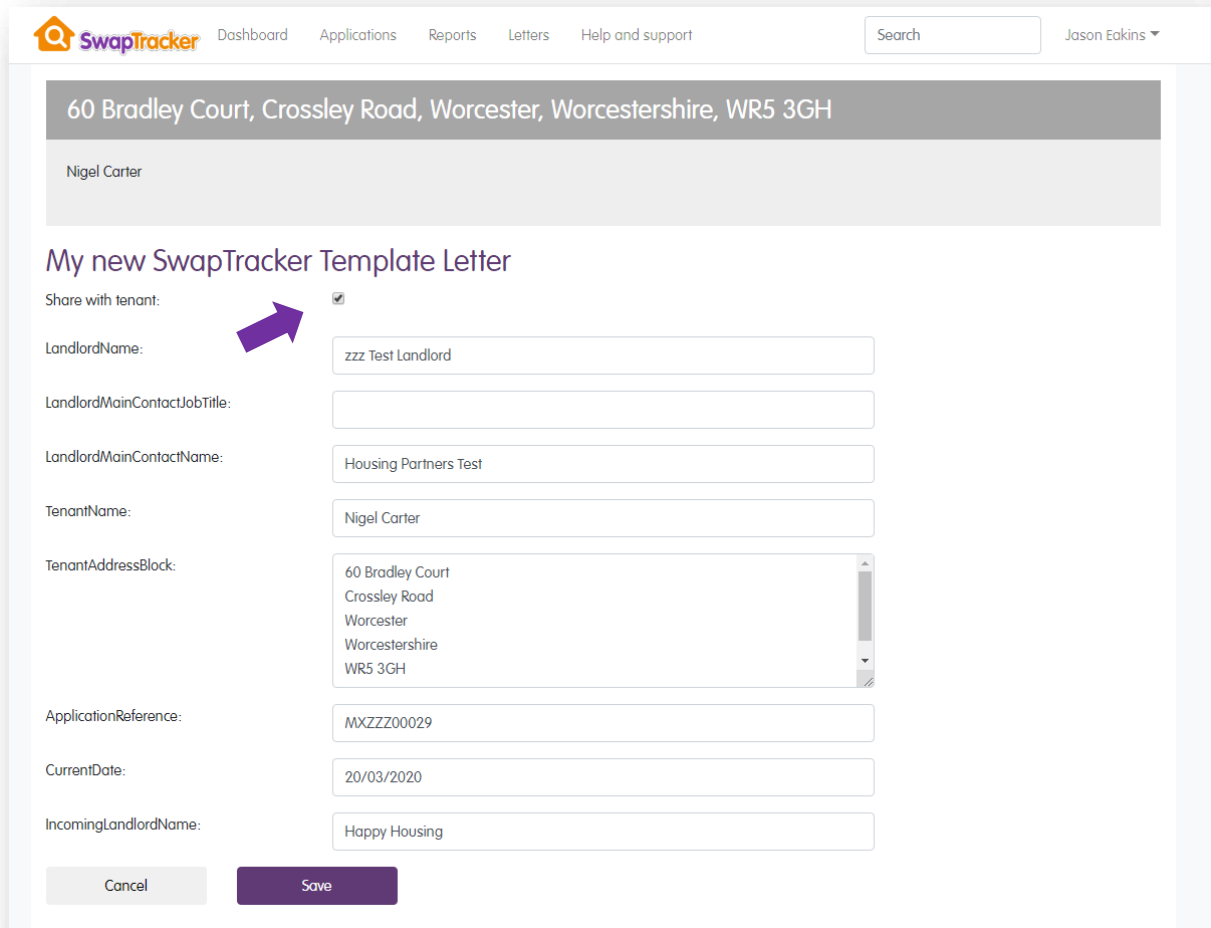
If I can be of any further help to you, please ring me on

Yours sincerely,
Housing Partners Test

Sharing letters with tenants

If you want to provide more transparency and keep the tenant up to date, you can also choose to “share” the letters you create against their application.

To share a letter with a tenant simply tick the “Share with tenant” box when generating it:



60 Bradley Court, Crossley Road, Worcester, Worcestershire, WR5 3GH

Nigel Carter

My new SwapTracker Template Letter

Share with tenant: ☒

LandlordName:

LandlordMainContactJobTitle:

LandlordMainContactName:

TenantName:

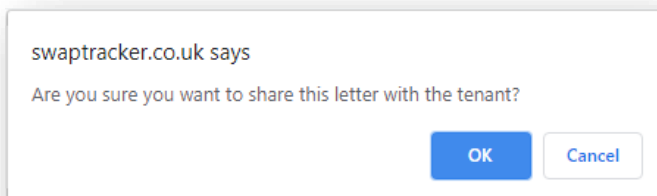
TenantAddressBlock:

ApplicationReference:

CurrentDate:

IncomingLandlordName:

When you click “Save” you will then be asked to confirm you wish to share it:



swaptracker.co.uk says

Are you sure you want to share this letter with the tenant?

Sharing letters allows the tenant to see them on their SwapTracker.

Note: by default, letters are NOT shared with tenants.

On the list of letters for an application you can see which are shared and which are not.

Letters - MXZZZ00029

Generate letters

Default SwapTracker letter types

Choose a letter type

Approval

Generate letter

Your custom letter types

Choose a letter type

My new SwapTracker Template

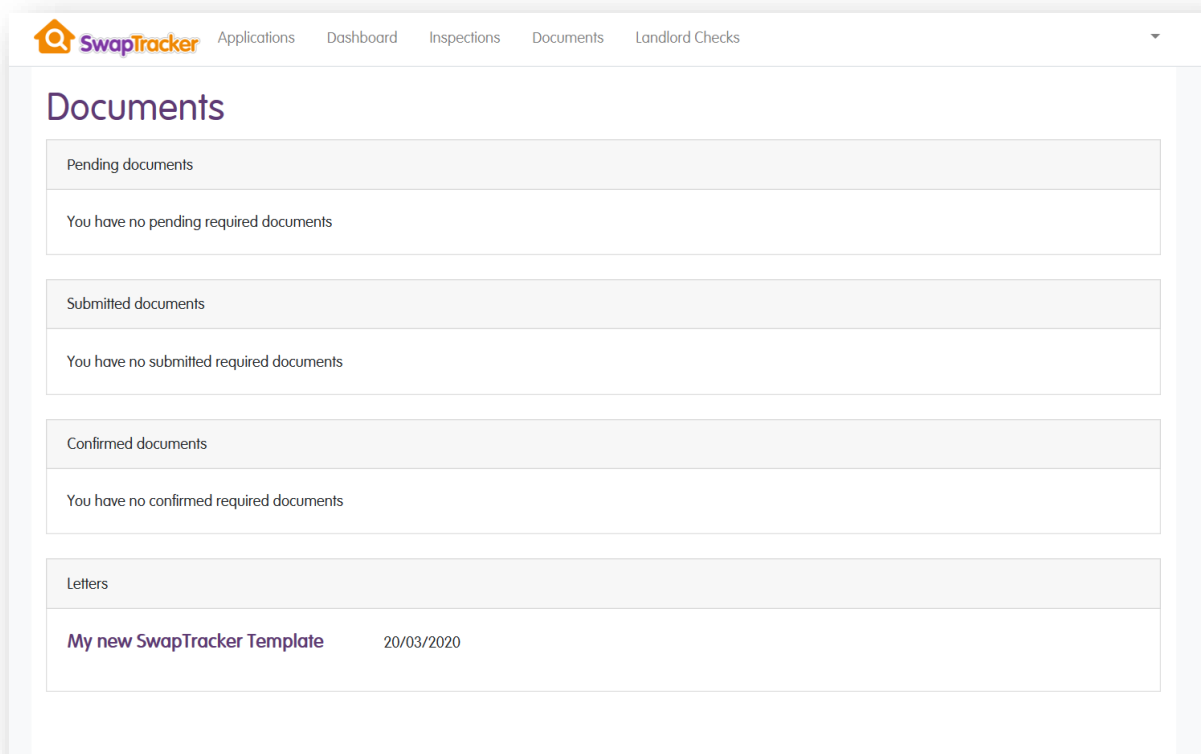
Generate letter

Previously generated letters

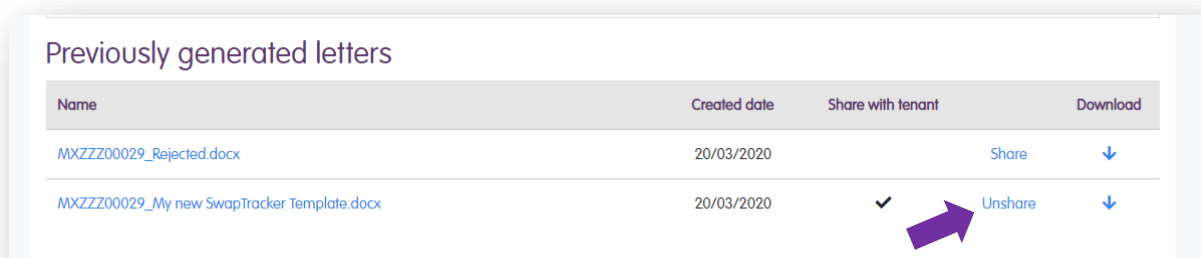
Name	Created date	Share with tenant	Download
MXZZZ00029_Rejected.docx	20/03/2020	Share	↓
MXZZZ00029_My new SwapTracker Template.docx	20/03/2020	✓ Unshare	↓

When you do share a letter, the tenant receives an email notifying them of this.

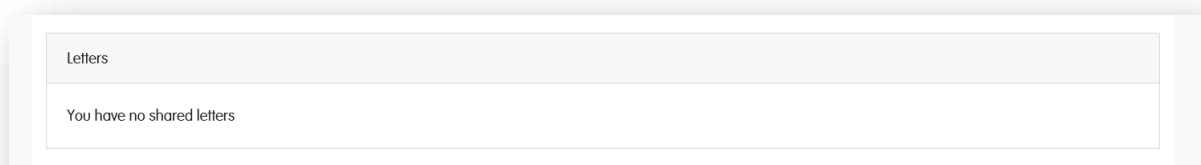
When they log into SwapTracker, they can then see details of their letters in the “Documents” section:



If you need to un-share a letter, simply click the “Unshare” link next to it.



The letter will then be hidden from the tenant’s SwapTracker.



As with un-sharing, you can also share an existing letter, by clicking the “Share” link next to it. Again, the tenant is emailed and will be able to see that letter in their SwapTracker.

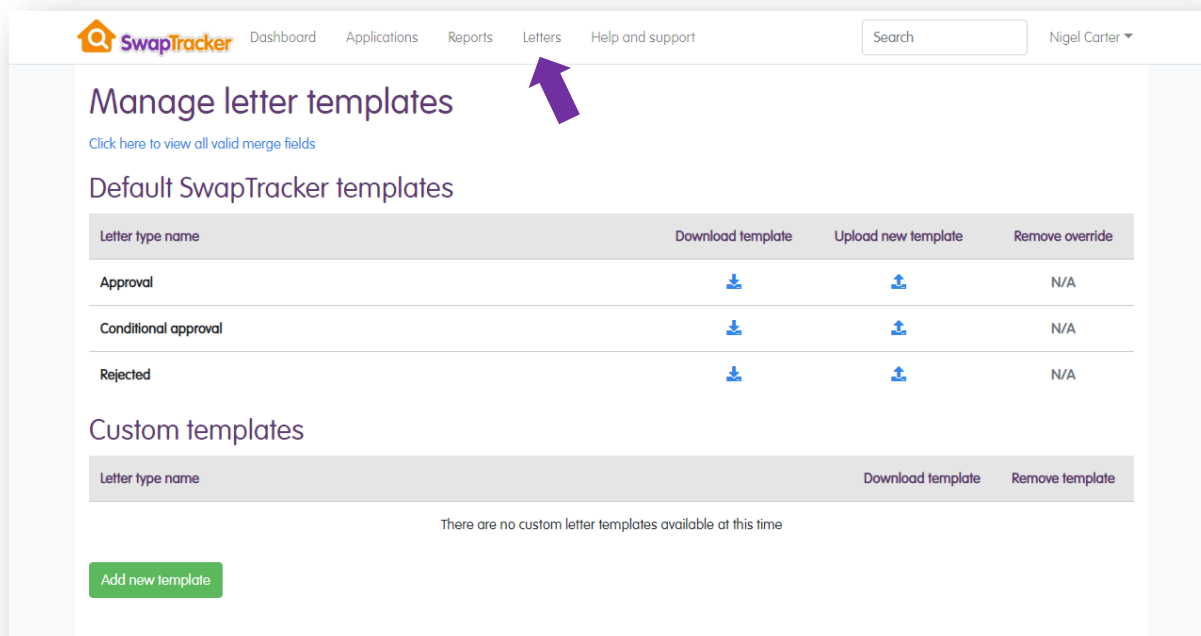
Note: all letters that are shared can be seen by the tenant in the their “Documents” section.

For this reason, you should always be careful not share any letters you would not want the tenant to see!







LETTER TEMPLATES

You can add/amend your SwapTracker letter templates in the “*Letters*” section.

This can be accessed by clicking on “*Letters*” in the top menu.



The screenshot shows the SwapTracker interface. The top navigation bar includes 'Dashboard', 'Applications', 'Reports', 'Letters', and 'Help and support'. A purple arrow points to the 'Letters' menu item. The main content area is titled 'Manage letter templates' and includes a link to 'Click here to view all valid merge fields'. Below this, there are two sections: 'Default SwapTracker templates' and 'Custom templates'.

Letter type name	Download template	Upload new template	Remove override
Approval			N/A
Conditional approval			N/A
Rejected			N/A

Below the default templates, there is a section for 'Custom templates' with a table that has columns for 'Letter type name', 'Download template', and 'Remove template'. A message states: 'There are no custom letter templates available at this time'. At the bottom left, there is a green button labeled 'Add new template'.

Adding your own templates

To add your own templates, you must first create one in Microsoft Word (or you may already have similar templates you are using now).

When creating templates, you can use any text and formatting you wish as well as including images. To pull in information automatically from the application (e.g. tenant name) you can also add “merge fields” to your templates.

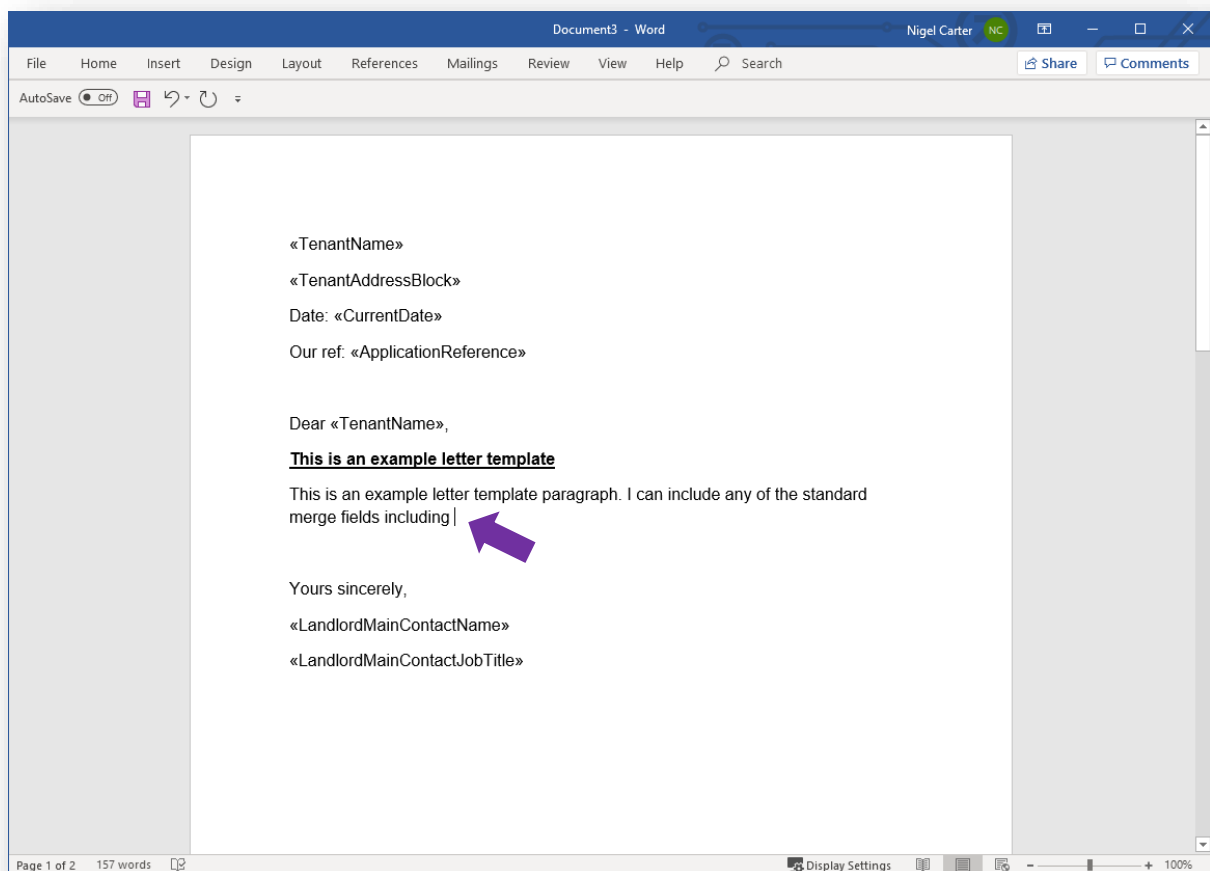
Adding “Merge fields”

“Merge fields” are placeholders in your letter template which will be automatically populated when you create that letter against the SwapTracker application, e.g. the tenant name.

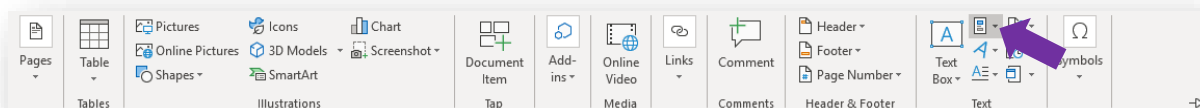
A full list of merge fields can be found in [Appendix One – SwapTracker Merge Fields](#)

To insert a merge field in your templates, follow these steps:

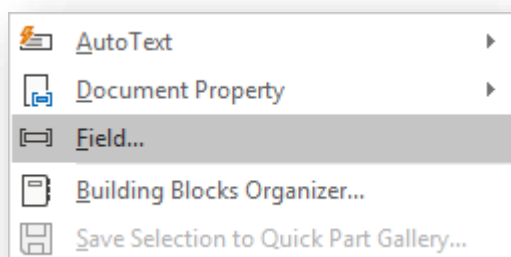
1. Click in the word document where you want to add it, e.g.



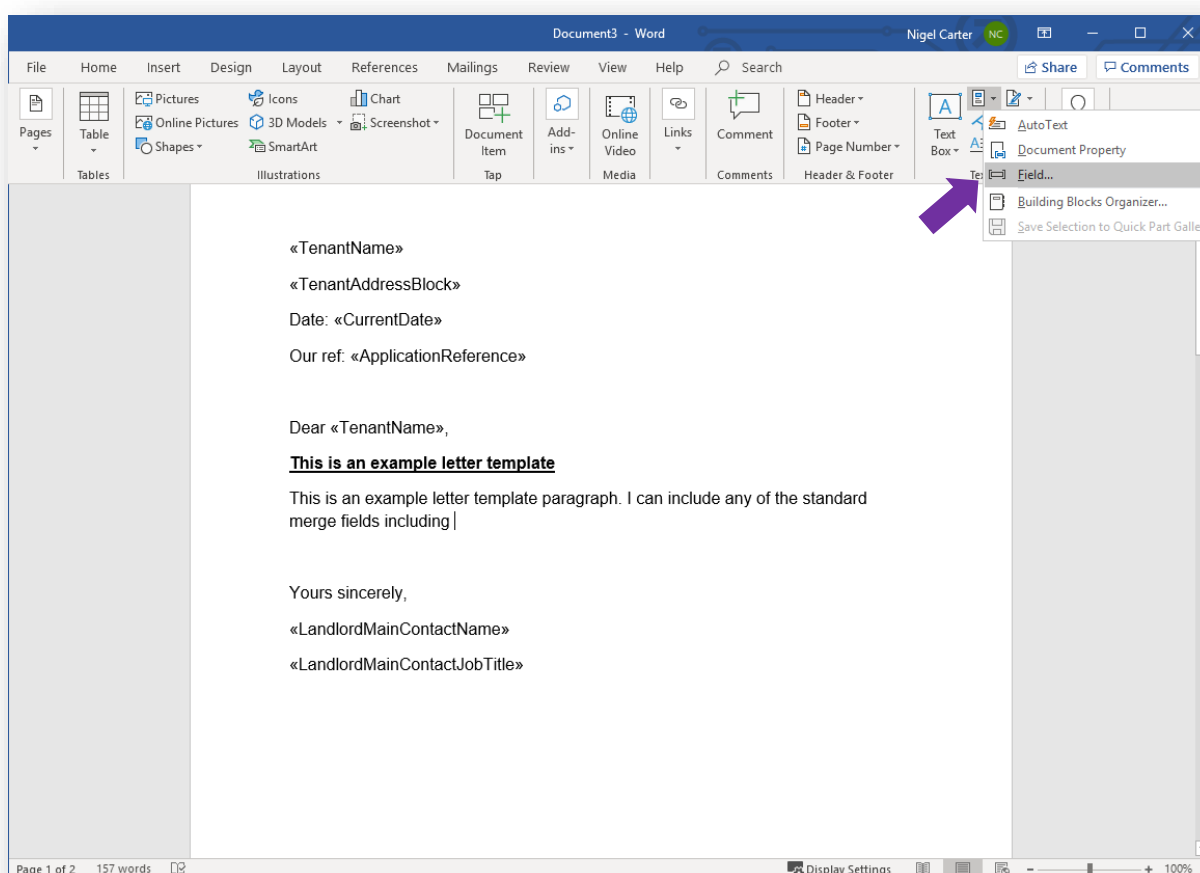
2. In the top menu, click on “Insert”.
3. In the “Insert” sub-menu that is shown, click on the “Quick Parts” tool:



4. A list of options will be shown:

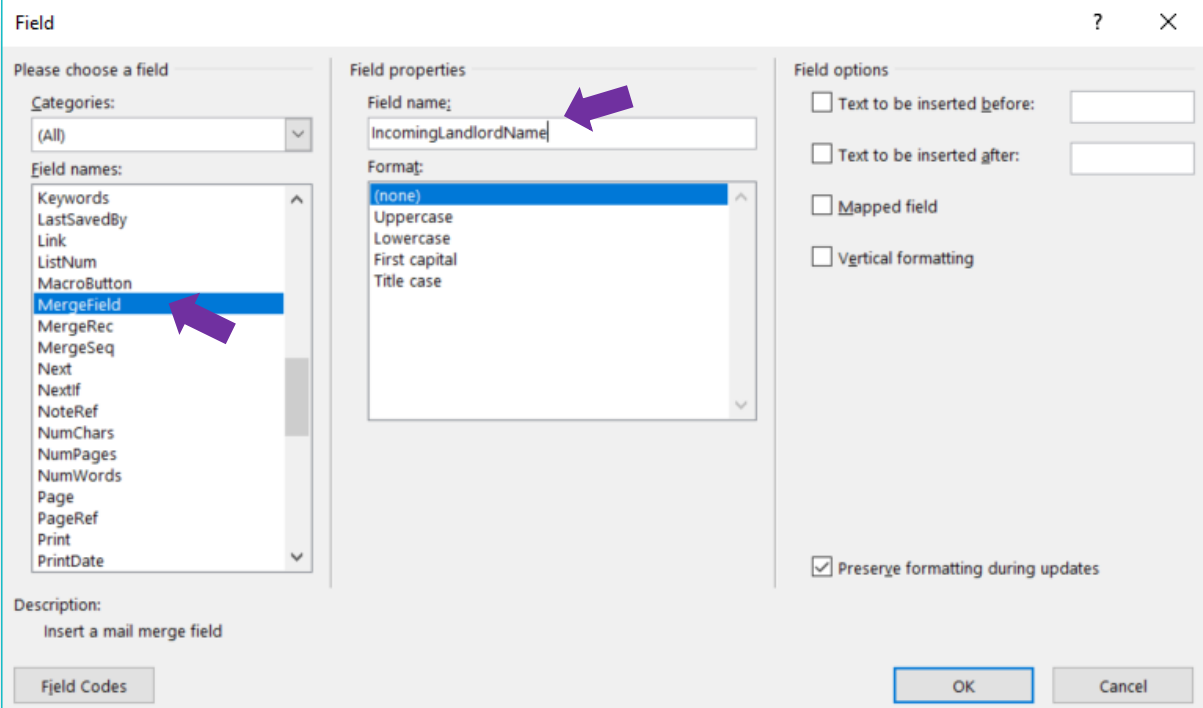


5. Click on “Field”:



6. A box will now appear for you to enter details of the field you wish to insert.

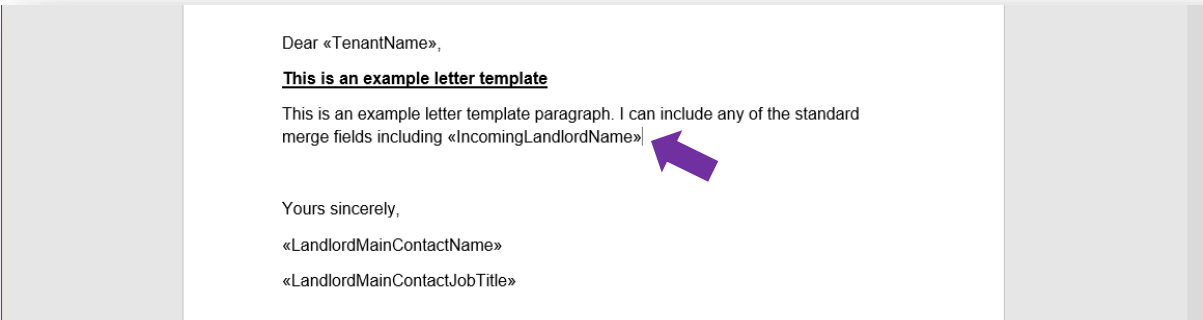
- In the “*Field names*” list select “MergeField”
- In the “*Field name*” box enter the name of the SwapTracker merge field, e.g. “IncomingLandlordName”. A full list of merge fields can be found in [Appendix One – SwapTracker Merge Fields](#)
- Click “Okay”



The screenshot shows the 'Field' dialog box with the following details:

- Please choose a field:**
 - Categories: (All)
 - Field names: A list with 'MergeField' highlighted.
 - Description: Insert a mail merge field
 - Field Codes button
- Field properties:**
 - Field name: IncomingLandlordName
 - Format: (none) selected from a list including Uppercase, Lowercase, First capital, and Title case.
- Field options:**
 - Text to be inserted before: (empty)
 - Text to be inserted after: (empty)
 - Mapped field: (unchecked)
 - Vertical formatting: (unchecked)
 - Preserve formatting during updates: (checked)
- Buttons: OK, Cancel

7. The merge field is now inserted in the document:



The screenshot shows a letter template with the following content:

Dear «TenantName»,

This is an example letter template

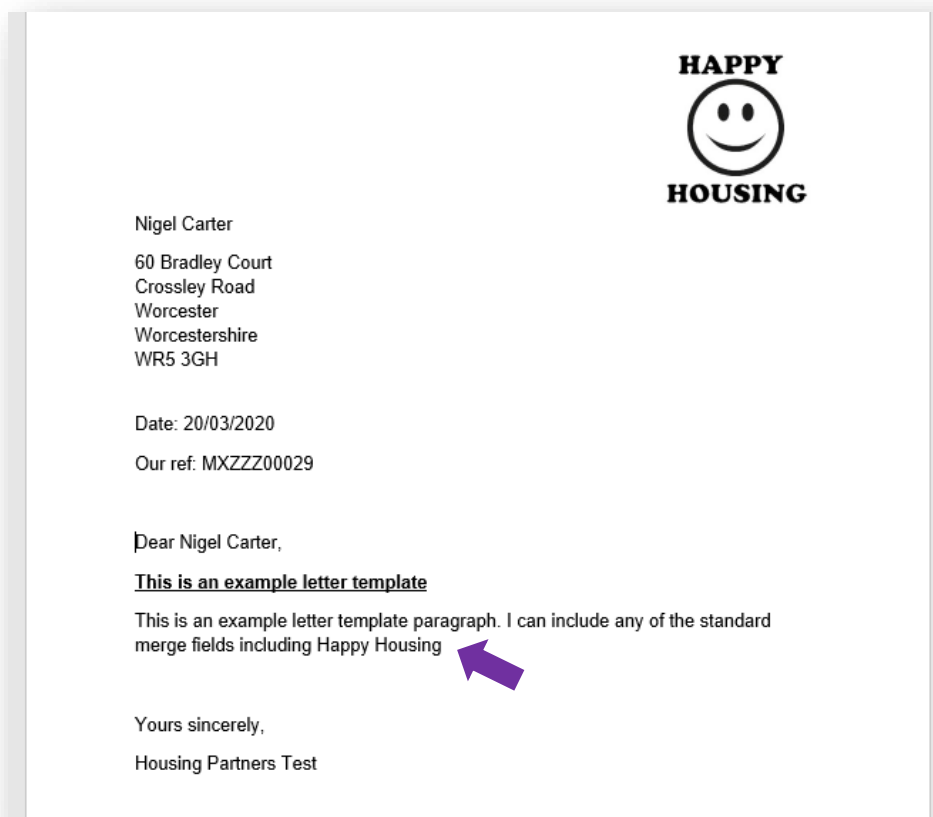
This is an example letter template paragraph. I can include any of the standard merge fields including «IncomingLandlordName»

Yours sincerely,

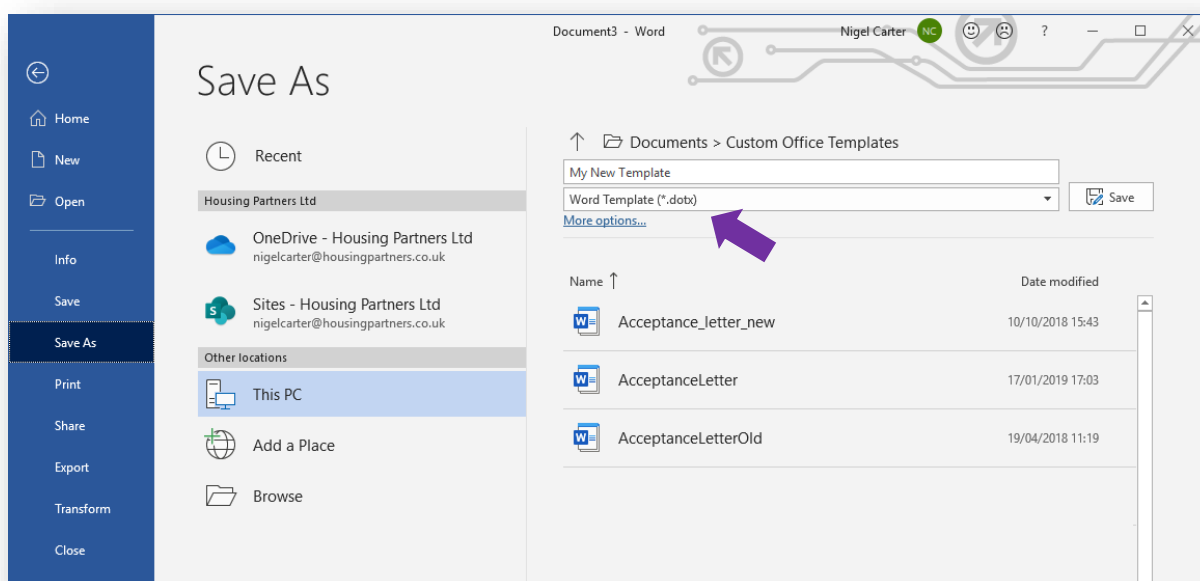
«LandlordMainContactName»

«LandlordMainContactJobTitle»

Later, when you use this template your merge field will automatically pull in the that information from the tenant's application, e.g. the incoming landlord's name:



8. When you have finished creating your template click “Save” but make sure it is saved as a **“Microsoft Word Template (.dotx)”**

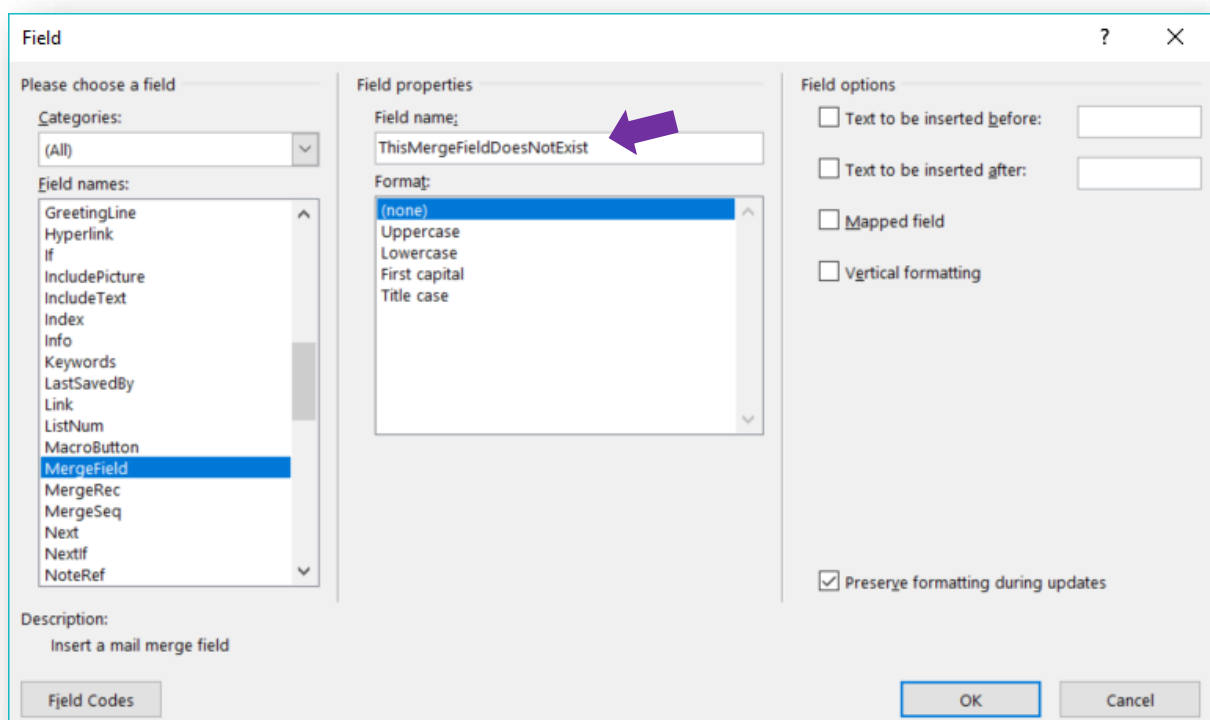


Adding your own merge fields

As well as the standard merge fields ([Appendix One – SwapTracker Merge Fields](#)) that are automatically populated, you can also add your own in any letter template.

These will not be automatically populated with information from the application but are very useful if you have letters where you need to change the content of some paragraphs every time you create the letter.

In the example below, a merge field is inserted in the letter template called “*ThisMergeFieldDoesNotExist*”



Field

Please choose a field

Categories:
(All)

Field names:
GreetingLine
Hyperlink
If
IncludePicture
IncludeText
Index
Info
Keywords
LastSavedBy
Link
ListNum
MacroButton
MergeField
MergeRec
MergeSeq
Next
Nextif
NoteRef

Description:
Insert a mail merge field

Field properties

Field name:
ThisMergeFieldDoesNotExist

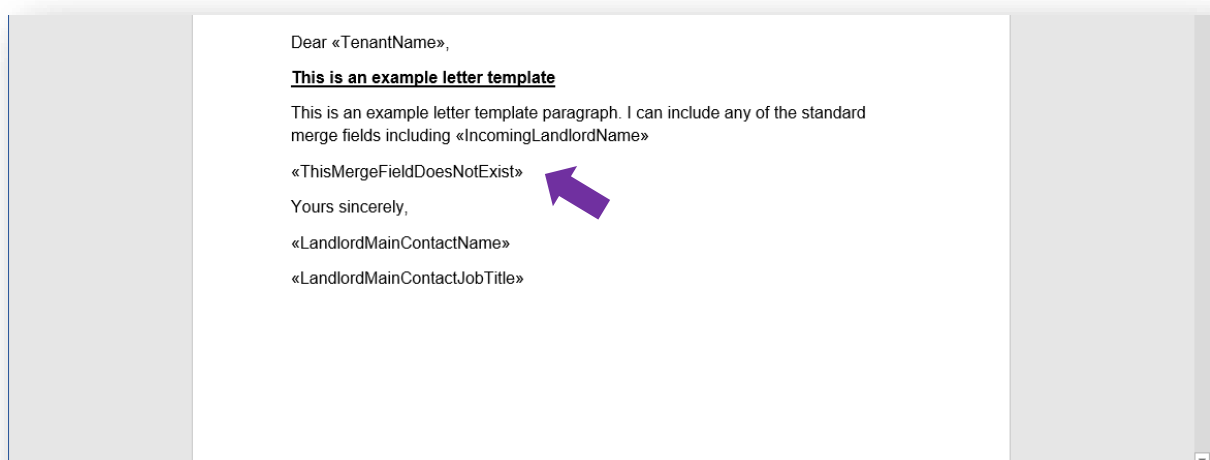
Format:
(none)
Uppercase
Lowercase
First capital
Title case

Field options

☐ Text to be inserted before:
☐ Text to be inserted after:
☐ Mapped field
☐ Vertical formatting

☒ Preserve formatting during updates

Field Codes OK Cancel



Dear «TenantName»,

This is an example letter template

This is an example letter template paragraph. I can include any of the standard merge fields including «IncomingLandlordName»

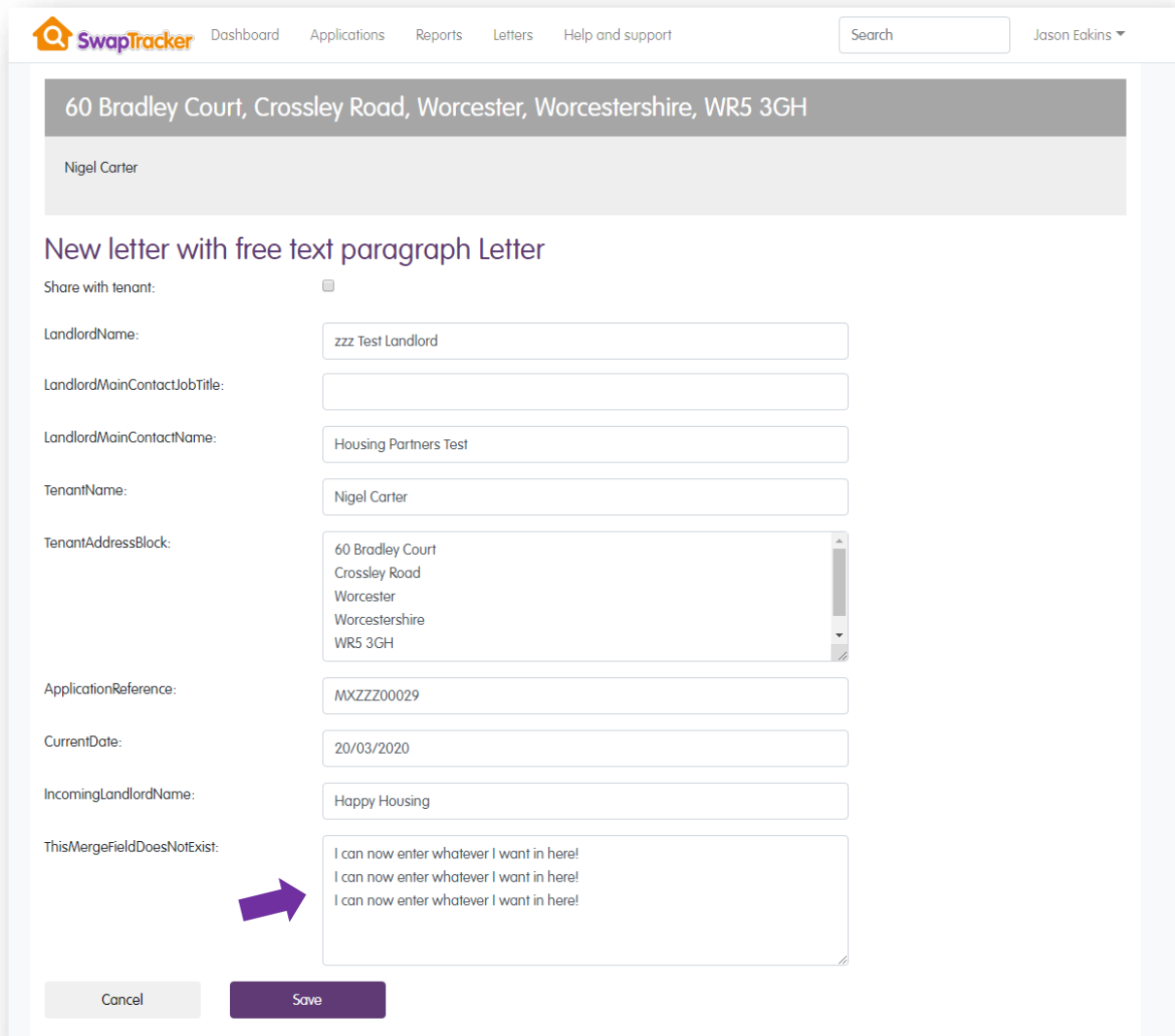
«ThisMergeFieldDoesNotExist»

Yours sincerely,

«LandlordMainContactName»

«LandlordMainContactJobTitle»

Now, when we generate this letter for any SwapTracker application the custom merge field “ThisMergeFieldDoesNotExist” allows us to enter any text we want...



60 Bradley Court, Crossley Road, Worcester, Worcestershire, WR5 3GH

Nigel Carter

New letter with free text paragraph Letter

Share with tenant: ☐

LandlordName:

LandlordMainContactJobTitle:

LandlordMainContactName:

TenantName:

TenantAddressBlock:

ApplicationReference:

CurrentDate:

IncomingLandlordName:

ThisMergeFieldDoesNotExist:

...and the letter that is created includes this text:

This is an example letter template

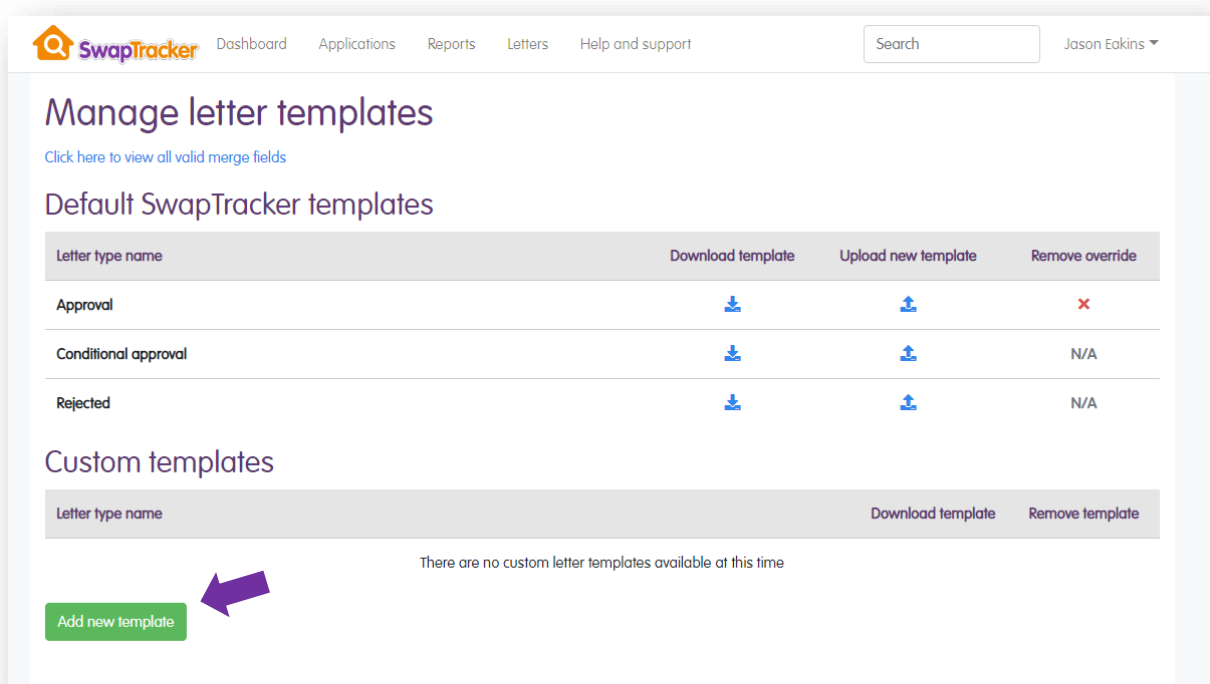
This is an example letter template paragraph. I can include any of the standard merge fields including Happy Housing

I can now enter whatever I want in here!
I can now enter whatever I want in here!
I can now enter whatever I want in here!

Yours sincerely,

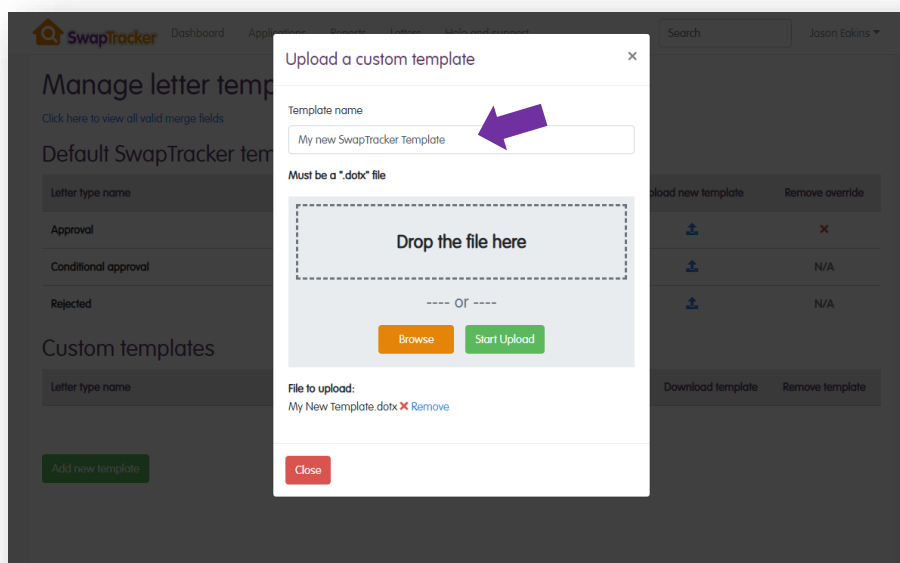
Uploading your template

To upload your template, go to the “Letters” section and click on “*Add new template*”.

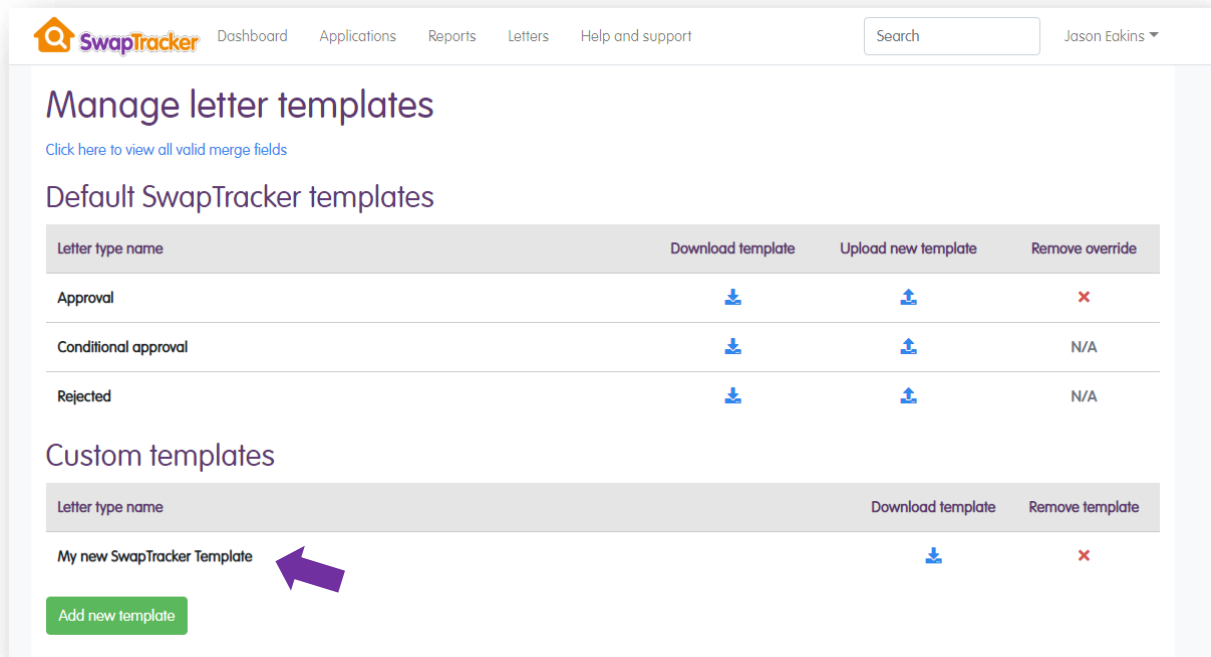


You will now be prompted to provide a name for your template. Choose something short but helps describe the letter type. This name will appear in future lists of your letters so should be easily identifiable.

Next, click “Browse”, select your “.dotx” file on your device and then click “Start upload” to upload the new template:










Your new template will now have been uploaded to your “*Custom templates*” and is ready to use!





Manage letter templates


[Click here to view all valid merge fields](#)

Default SwapTracker templates

Letter type name	Download template	Upload new template	Remove override
Approval			
Conditional approval			N/A
Rejected			N/A

Custom templates

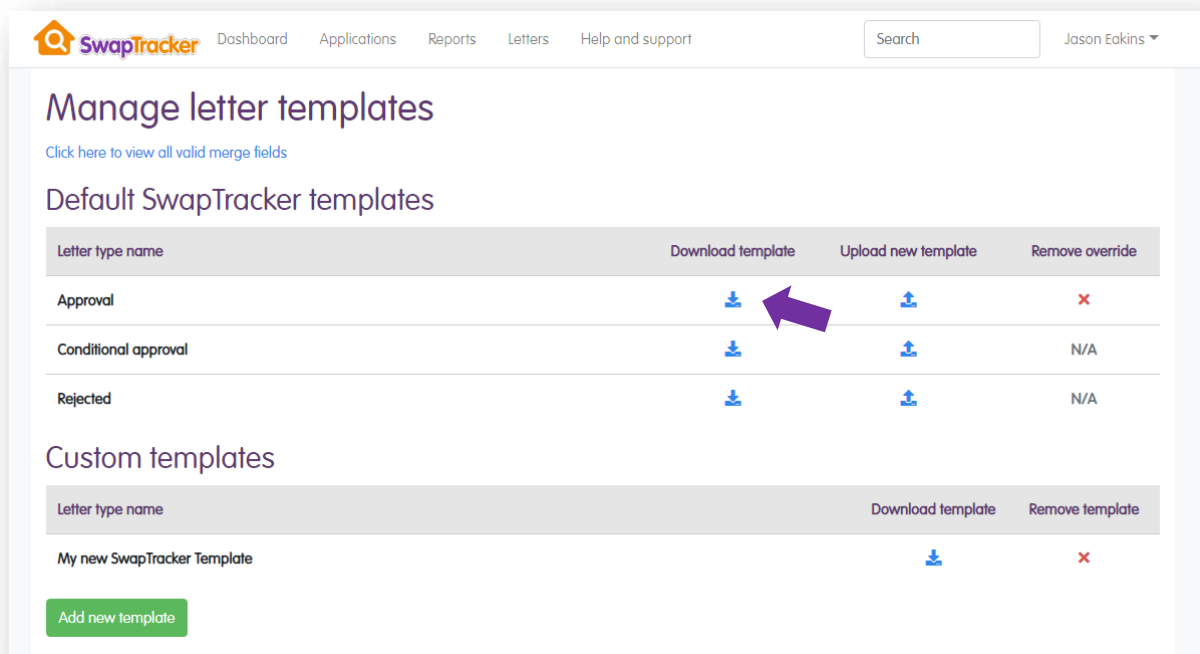
Letter type name	Download template	Remove template
My new SwapTracker Template		



[Add new template](#)








Amending a template

To amend an existing template (including the standard Approval, Conditional Approval and Rejected letters that come with SwapTracker), first download the template you want to change by clicking the icon next to it:





The screenshot shows the 'Manage letter templates' page in the SwapTracker application. The page has a navigation bar with links to Dashboard, Applications, Reports, Letters, and Help and support. A search bar and the user's name 'Jason Eakins' are also visible. The main content area is titled 'Manage letter templates' and includes a link to 'view all valid merge fields'. Below this, there are two sections: 'Default SwapTracker templates' and 'Custom templates'.

Default SwapTracker templates

Letter type name	Download template	Upload new template	Remove override
Approval			
Conditional approval			N/A
Rejected			N/A

Custom templates

Letter type name	Download template	Remove template
My new SwapTracker Template		

At the bottom of the custom templates section, there is a green button labeled 'Add new template'.


With the template opened in Microsoft Word, make your changes to the text by editing the document.

Please note: you can also change fonts, formatting and even add images.

You can also add “Merge Fields” (e.g. to include the tenant’s name or something specific to the application or your organisation).

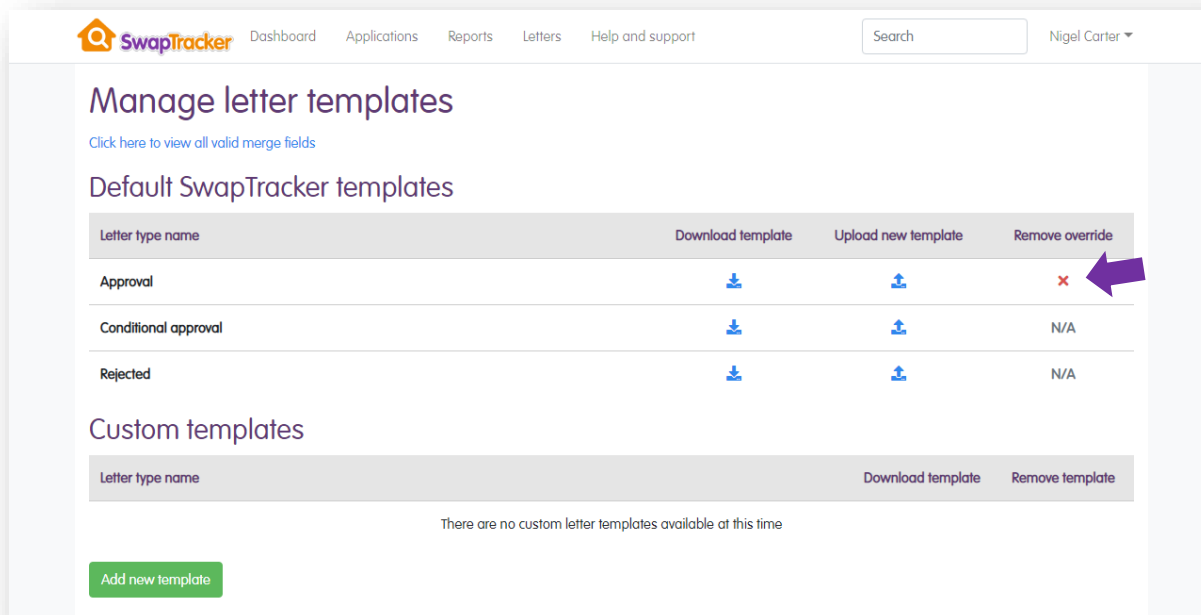
For full details on amending templates in Microsoft Word and adding merge fields, please refer to [Adding your own templates](#)

When you have finished changing the template, save the amended document. Remember – the template must always be saved as a **Microsoft Word Template (“.dotx”) file**.

Finally, to re-upload the amended version, click the “*Upload*” icon () next to the template in SwapTracker.

You will now be prompted to select your new template and upload it.









If you are changing one of the default templates, a red cross will appear to indicate that you have overridden the original standard version with your own.



Manage letter templates

[Click here to view all valid merge fields](#)

Default SwapTracker templates

Letter type name	Download template	Upload new template	Remove override
Approval			 
Conditional approval			N/A
Rejected			N/A

Custom templates

Letter type name	Download template	Remove template
There are no custom letter templates available at this time		

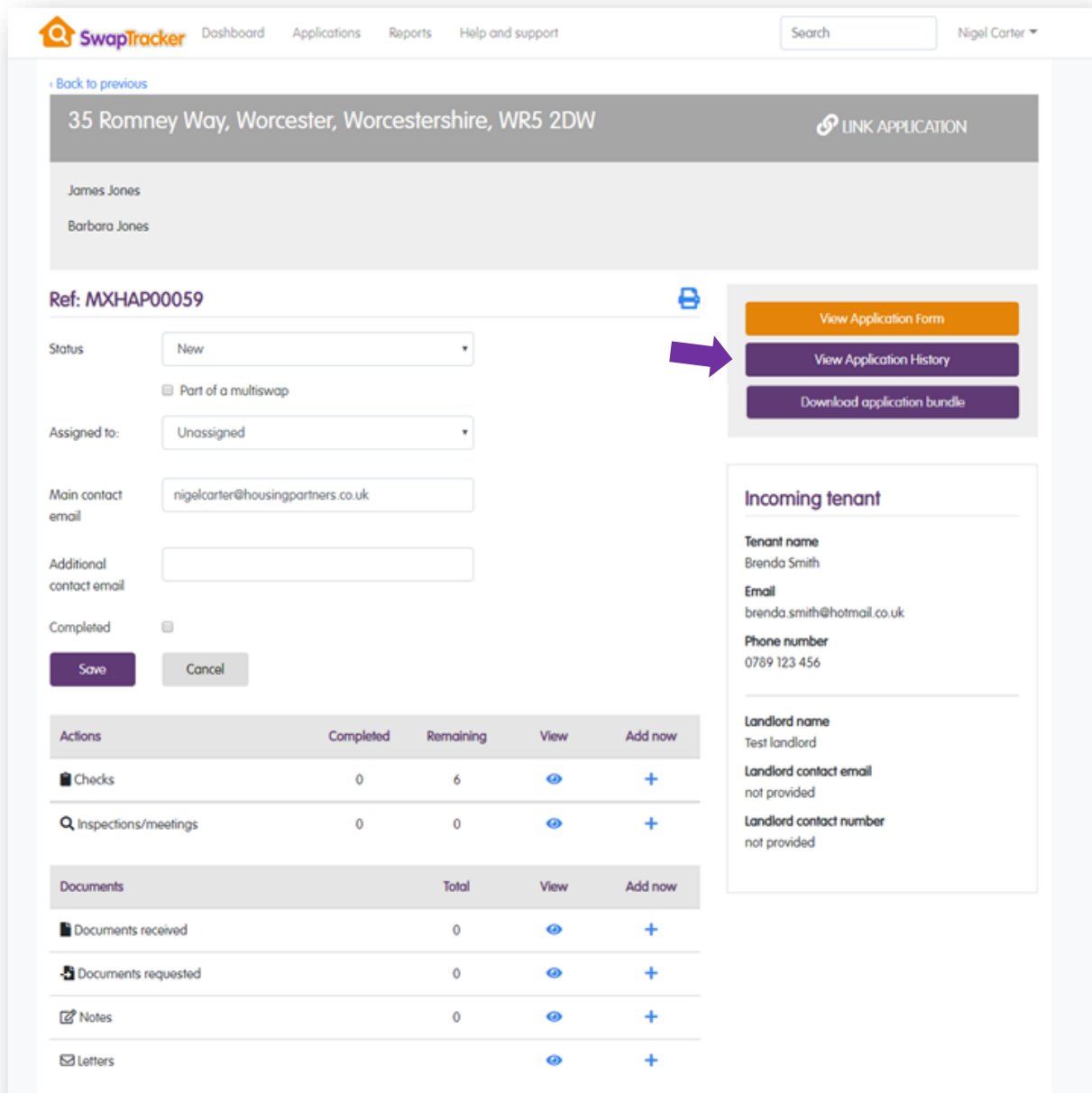
[Add new template](#)

If you ever need to revert to the original template, simply click that red cross to remove the override.

APPLICATION HISTORY

A complete history of all events relating to an application (including who performed the action) is shown in the “*History*” section.

This is accessed by clicking the “*View Application History*” button on the Application Summary page.



SwapTracker Dashboard Applications Reports Help and support Search Nigel Carter ▾

Back to previous

35 Romney Way, Worcester, Worcestershire, WR5 2DW LINK APPLICATION

James Jones
Barbara Jones

Ref: MXHAP00059

Status: New ▾
☐ Part of a multiswap

Assigned to: Unassigned ▾

Main contact email: nigelcarter@housingpartners.co.uk

Additional contact email:

Completed: ☐

Save Cancel

Actions

	Completed	Remaining	View	Add now
Checks	0	6	View	+
Inspections/meetings	0	0	View	+

Documents

	Total	View	Add now
Documents received	0	View	+
Documents requested	0	View	+
Notes	0	View	+
Letters		View	+

View Application Form
View Application History
Download application bundle

Incoming tenant

Tenant name
Brenda Smith

Email
brenda.smith@hotmail.co.uk


Phone number
0789 123 456

Landlord name
Test landlord

Landlord contact email
not provided

Landlord contact number
not provided

The History list shows all the key events for the application, the date they occurred and the user who performed them.


Dashboard Applications Reports Help and support

Nigel Carter ▾

[Back to previous](#)

History - MXHAP00059

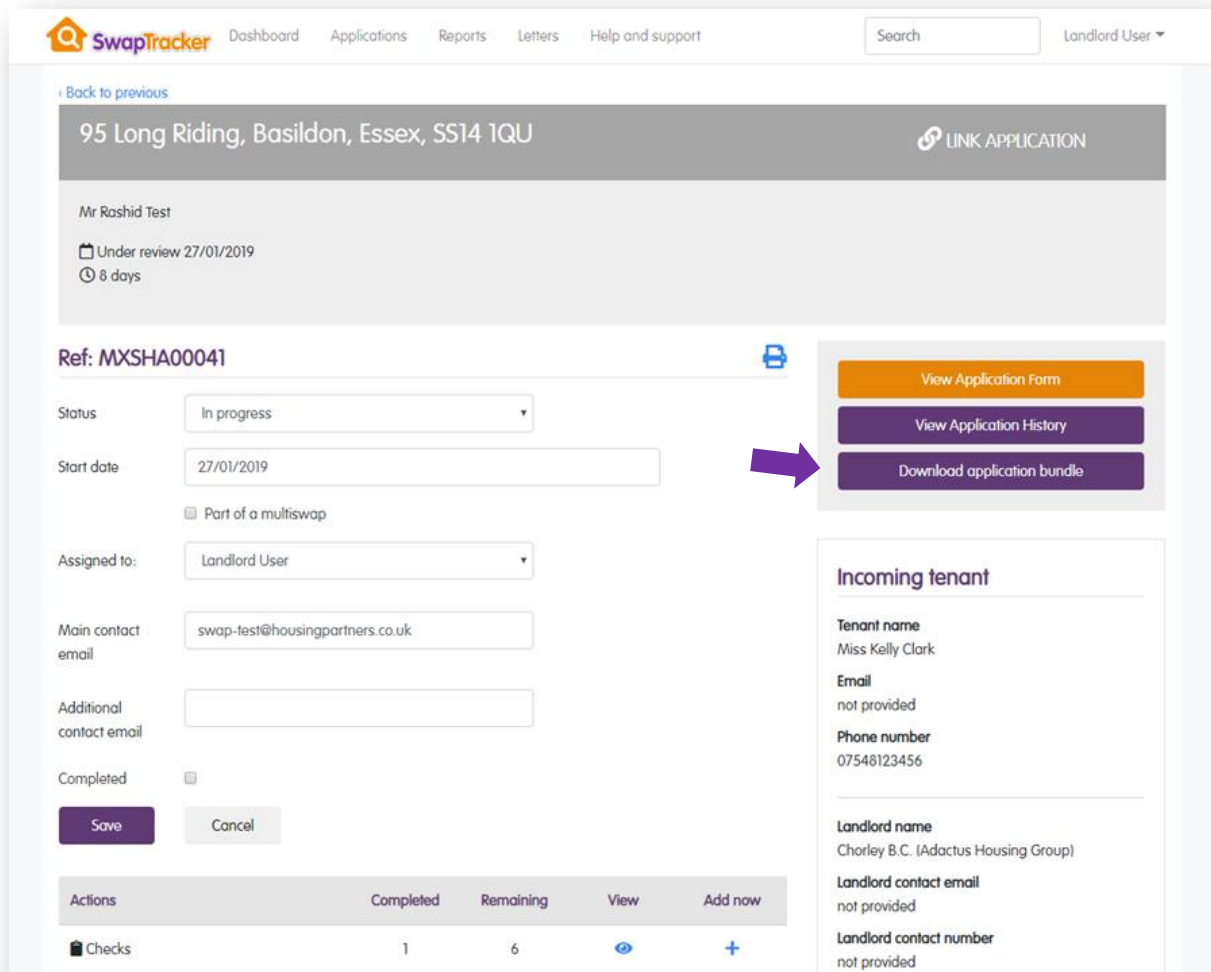
Date	Type	Description	User
21/10/2019	Application linked	Application linked to MXHAP00060	nigelcarter@housingpartners.co.uk
21/10/2019	Application status changed (general)	Application status changed to In progress	nigelcarter@housingpartners.co.uk
21/10/2019	Under review date changed	Application review start date changed to DD/10/YYYY	nigelcarter@housingpartners.co.uk
21/10/2019	Application status changed (general)	Application status changed to Received	nigelcarter@housingpartners.co.uk
21/10/2019	Application status changed (general)	Application status changed to New	james.jones@click2mail.net
21/10/2019	Application form submitted	Application form submitted	james.jones@click2mail.net
21/10/2019	Application status changed (general)	Application status changed to Form incomplete	nigelcarter@housingpartners.co.uk
21/10/2019	Application status - form incomplete	Application status changed to Form Incomplete. Reason: As discussed, please enter details of everyone who is moving with you. You have only included the joint tenant.	nigelcarter@housingpartners.co.uk
21/10/2019	Application assigned	Application assigned to Andrew Lee	nigelcarter@housingpartners.co.uk
21/10/2019	Application status changed (general)	Application status changed to Received	nigelcarter@housingpartners.co.uk
21/10/2019	Application status changed (general)	Application status changed to New	james.jones@click2mail.net
21/10/2019	Application form submitted	Application form submitted	james.jones@click2mail.net

APPLICATION DATA EXTRACT (“BUNDLE”)

A full data extract of all information related to an application (including Documents and Letters) can be downloaded from SwapTracker.

This can be used for attaching to a tenancy created in your Housing Management system or for a GDPR data access request.

This is downloaded by clicking the “*View Application bundle*” button on the Application Summary page.



SwapTracker Dashboard Applications Reports Letters Help and support Search Landlord User ▼

Back to previous

95 Long Riding, Basildon, Essex, SS14 1QU LINK APPLICATION

Mr Rashid Test

Under review 27/01/2019
8 days

Ref: MXSHA00041

Status: In progress

Start date: 27/01/2019

☐ Part of a multiswap

Assigned to: Landlord User

Main contact email: swap-test@housingpartners.co.uk

Additional contact email:

Completed: ☐

Save Cancel

View Application Form
View Application History
Download application bundle

Incoming tenant

Tenant name: Miss Kelly Clark

Email: not provided

Phone number: 07548123456

Landlord name: Chorley B.C. (Adactus Housing Group)

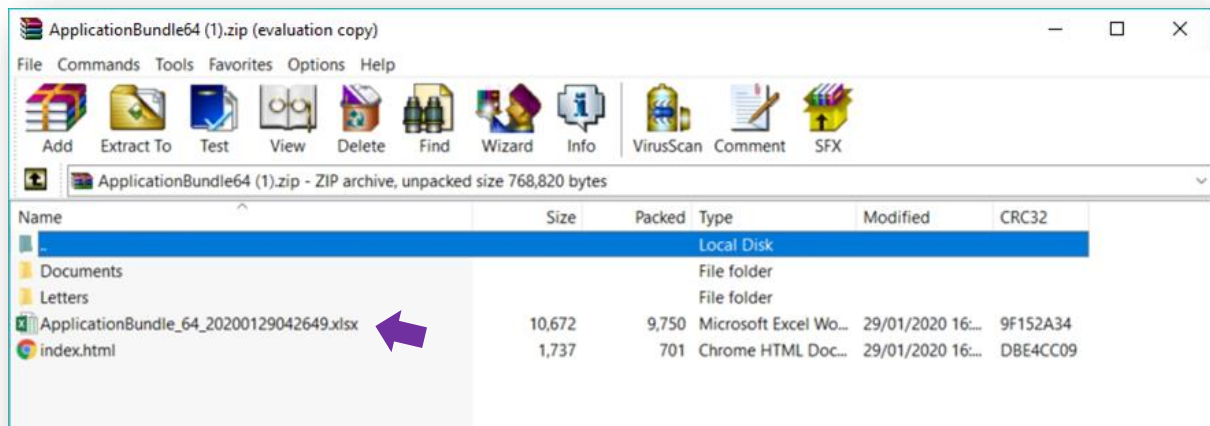
Landlord contact email: not provided

Landlord contact number: not provided

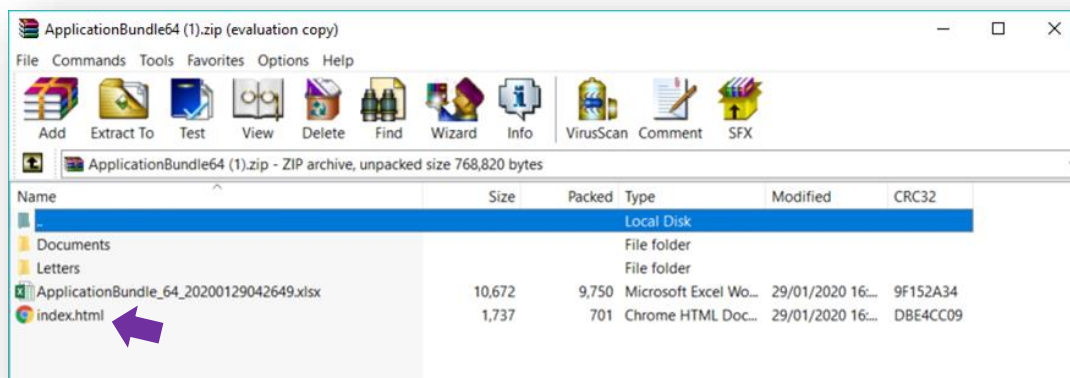
Actions	Completed	Remaining	View	Add now
Checks	1	6		+

The “data bundle” downloaded comes in the form of a “ZIP” file.

This includes an Excel file which includes all the information against the application as well as the answers given on the application form.

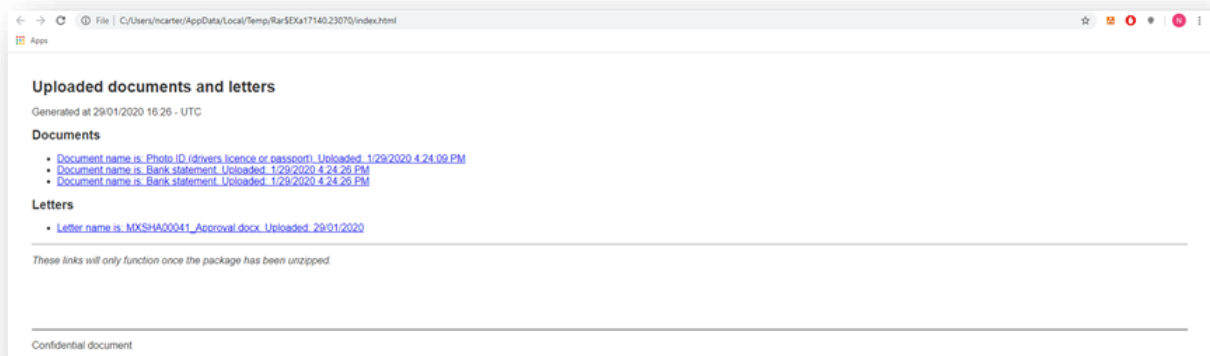


The bundle also includes an “index.html” file.

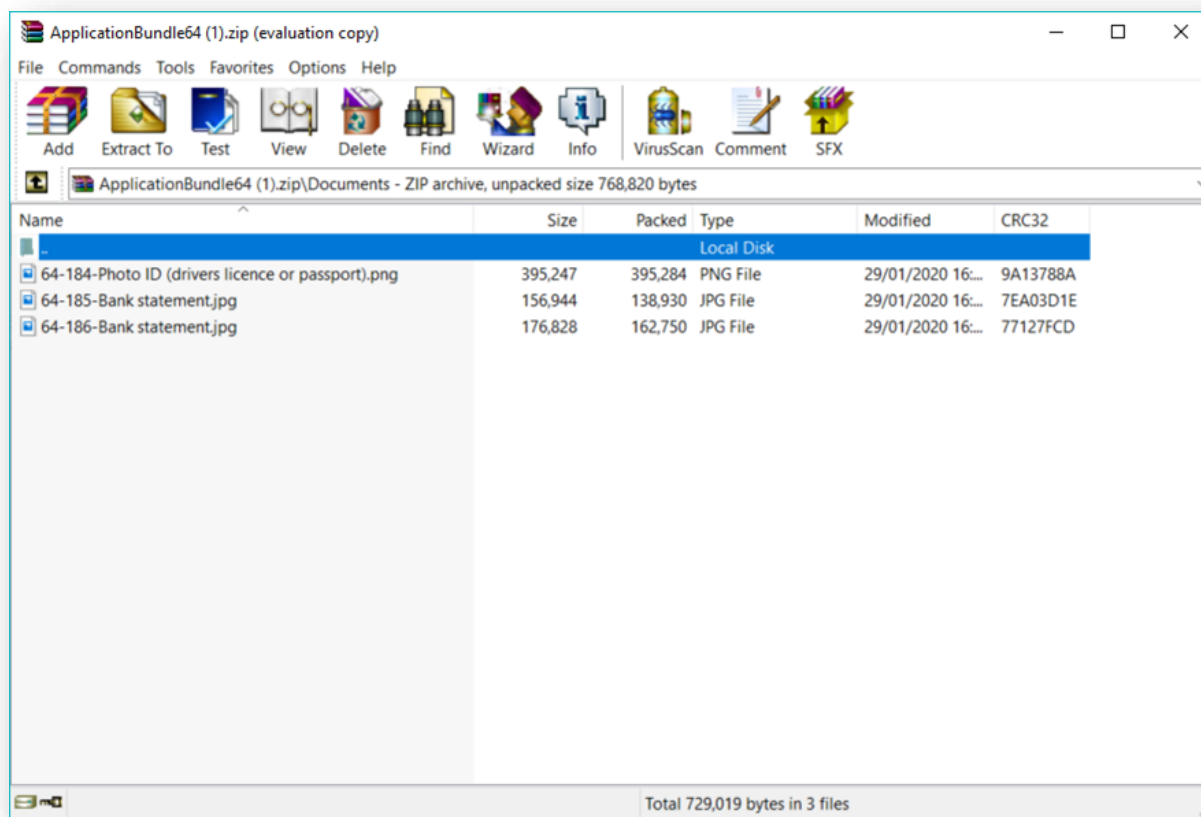


Opening this gives you a list of the document and letter files in the extract.

Click on any of these links to open the actual file.



Alternatively, simply click into one of the directories (“Documents” or “Letters”) to see the list of files, e.g.



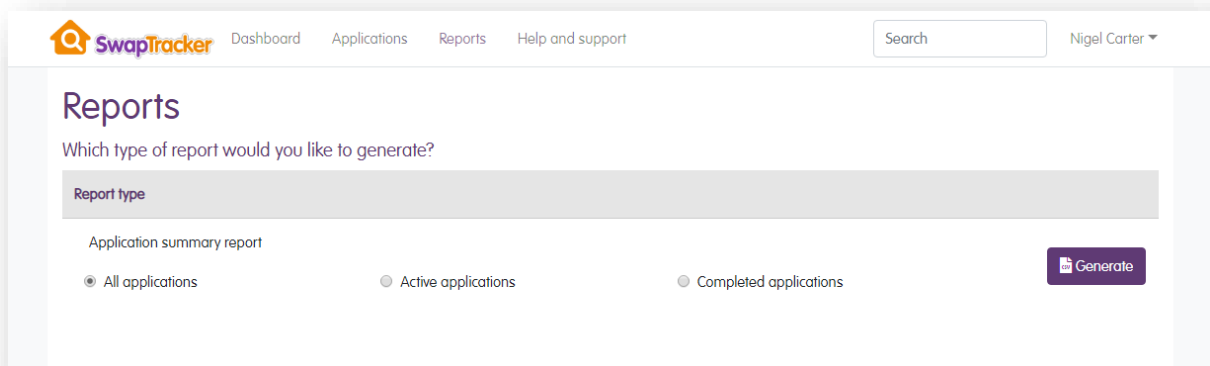
REPORTING

The Reports section is accessed by clicking the “Reports” link in the SwapTracker header bar.

Application summary report

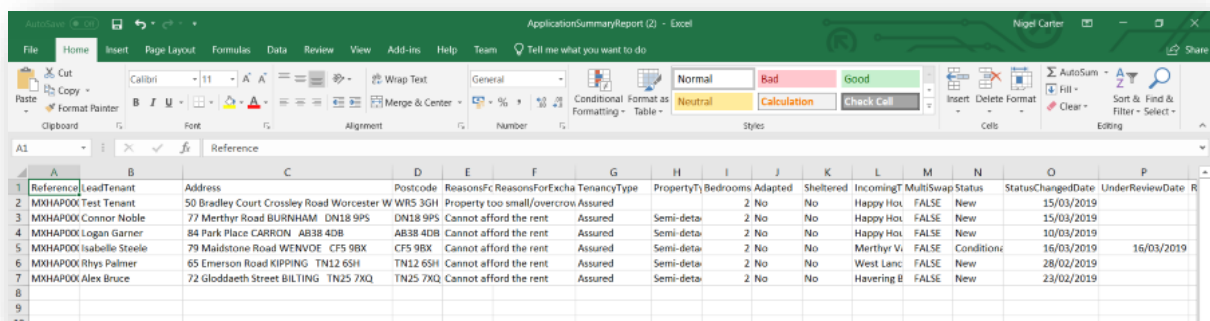
There are 3 options you can choose:

1. All applications – this returns all applications regardless of their status (excluding deleted)
2. Active applications – this returns only applications that are in progress
3. Completed applications – this returns only complete applications (see [Setting an Application to Complete](#))



The screenshot shows the SwapTracker web interface. The top navigation bar includes 'Dashboard', 'Applications', 'Reports', and 'Help and support'. A search bar and a user profile 'Nigel Carter' are on the right. The main heading is 'Reports'. Below it, a question asks 'Which type of report would you like to generate?'. A dropdown menu labeled 'Report type' is open, showing 'Application summary report'. Below this, three radio buttons are visible: 'All applications' (selected), 'Active applications', and 'Completed applications'. A 'Generate' button is on the right.

This generates a report of all your applications including the number of days taken to make the final decision (if applicable).



The screenshot shows an Excel spreadsheet titled 'ApplicationSummaryReport (2) - Excel'. The spreadsheet contains a table with the following data:

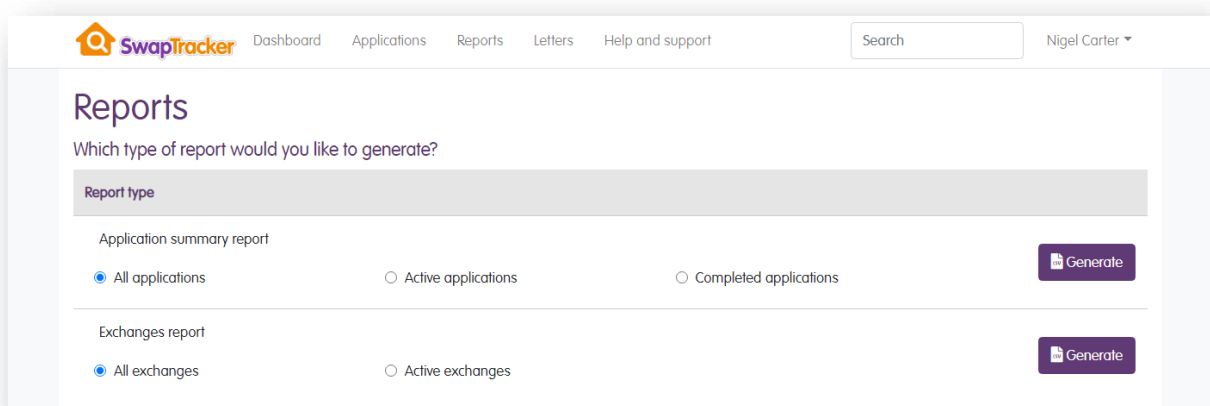
Reference	Lead/Tenant	Address	Postcode	ReasonsForExch	TenancyType	PropertyType	Bedrooms	Adapted	Sheltered	IncomingT	MultiSwap	Status	StatusChangedDate	UnderReviewDate
1	MXHAP00X Test Tenant	50 Bradley Court Crossley Road Worcester	WR5 3GH	Property too small/overcrowded	Assured		2	No	No	Happy Hoi	FALSE	New	15/03/2019	
2	MXHAP00X Connor Noble	77 Merthyr Road BURNHAM	DN18 9PS	Cannot afford the rent	Assured	Semi-detach	2	No	No	Happy Hoi	FALSE	New	15/03/2019	
3	MXHAP00X Logan Garner	84 Park Place CARRON	AB38 4DB	Cannot afford the rent	Assured	Semi-detach	2	No	No	Happy Hoi	FALSE	New	10/03/2019	
4	MXHAP00X Isabelle Steele	79 Maidstone Road WENVOE	CF5 9BX	Cannot afford the rent	Assured	Semi-detach	2	No	No	Merthyr Vi	FALSE	Conditional	16/03/2019	16/03/2019
5	MXHAP00X Rhys Palmer	65 Emerson Road KIPPING	TN12 6SH	Cannot afford the rent	Assured	Semi-detach	2	No	No	West Lanc	FALSE	New	28/02/2019	
6	MXHAP00X Alex Bruce	72 Gloddaeth Street BILTING	TN25 7XQ	Cannot afford the rent	Assured	Semi-detach	2	No	No	Haverling B	FALSE	New	23/02/2019	

Exchanges report

The Exchanges report allows you report on the overall exchanges, not just individual applications.

There are 2 options you can choose:

1. All exchanges – this returns all your exchanges
2. Active exchanges – this returns only exchanges that do not have any applications in them which have been set to “complete”.



The screenshot shows the SwapTracker web interface. At the top, there's a navigation bar with links: Dashboard, Applications, Reports, Letters, and Help and support. A search bar and the user name 'Nigel Carter' are on the right. The main heading is 'Reports'. Below it, a question asks 'Which type of report would you like to generate?'. There are two main sections: 'Application summary report' and 'Exchanges report'. Under 'Application summary report', there are three radio buttons: 'All applications' (selected), 'Active applications', and 'Completed applications'. A 'Generate' button is to the right. Under 'Exchanges report', there are two radio buttons: 'All exchanges' (selected) and 'Active exchanges'. A 'Generate' button is also to the right.

This generates a report of your exchanges, including details of the applications they include as well as any “placeholders”.

See [Linking Applications / Multiswaps](#) for more details.

The fields in the report are:

- Exchange name
- Date Created

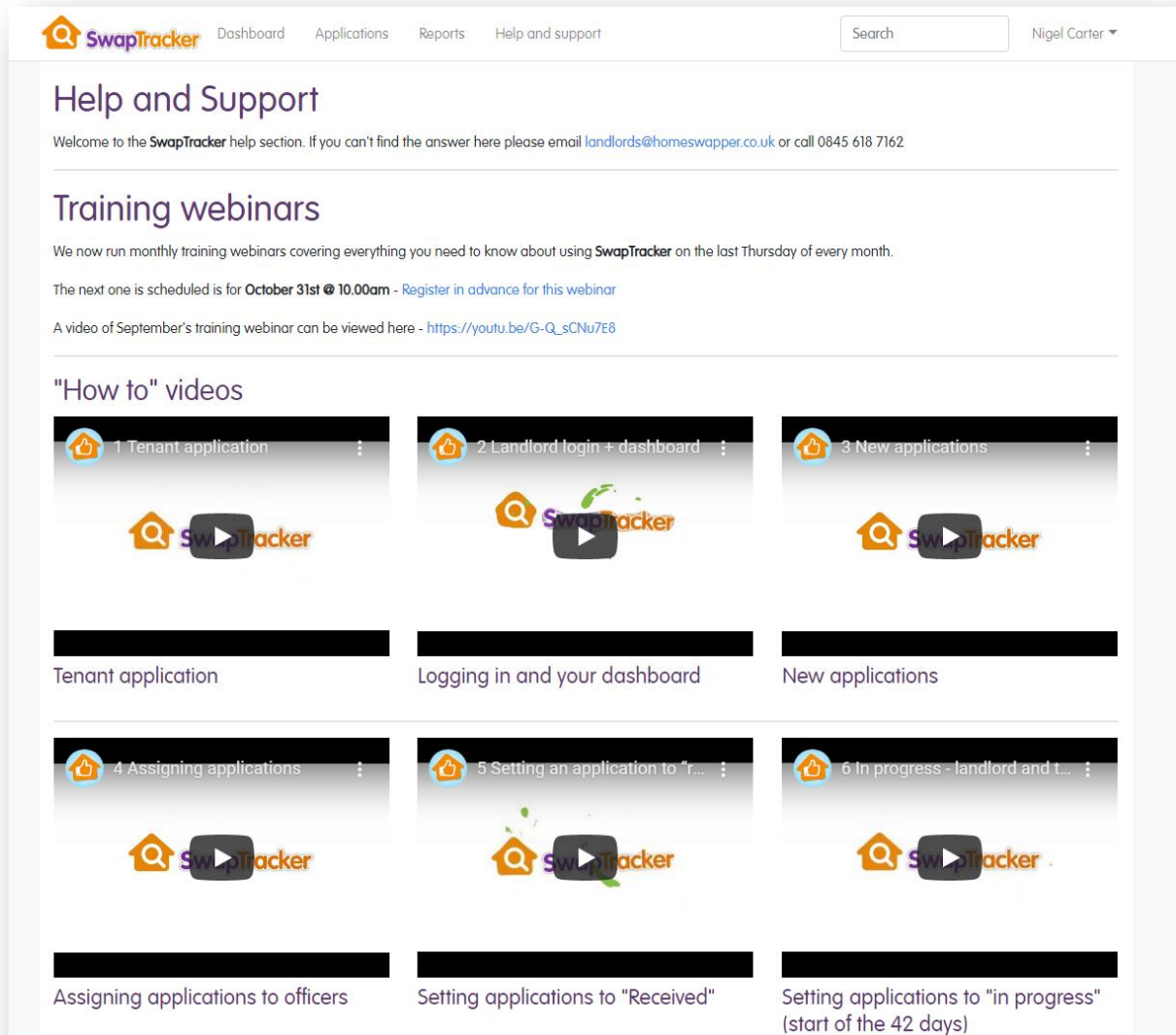
The following is then repeated for each application in the Exchange:

- Reference, i.e. application reference or "PLACEHOLDER"
- Application status
- Main tenant name
- Joint tenant name
- Property address
- Property, i.e. Number of bedrooms + Property type
- Landlord name
- Landlord contact email
- Landlord contact phone

Note: the report only shows the first **10** links. If an exchange contains more than 11 links, 11 onwards are not included.

HELP & SUPPORT

The SwapTracker “*Help and support*” area contains contact details for our dedicated Customer Support team, the SwapTracker User Guide, links to our monthly Training Webinar and other helpful resources.



The screenshot shows the SwapTracker web application interface. At the top is a navigation bar with links for Dashboard, Applications, Reports, and Help and support. A search bar and a user profile dropdown (Nigel Carter) are also present. The main heading is "Help and Support", followed by a welcome message and contact information: "Welcome to the SwapTracker help section. If you can't find the answer here please email landlords@homeswapper.co.uk or call 0845 618 7162."

The "Training webinars" section states: "We now run monthly training webinars covering everything you need to know about using SwapTracker on the last Thursday of every month." It mentions the next webinar is on "October 31st @ 10.00am" and provides a link to register. A link to a previous webinar video is also provided.

The "How to" videos section displays six video thumbnails in a 2x3 grid:

- 1 Tenant application
- 2 Landlord login + dashboard
- 3 New applications
- 4 Assigning applications
- 5 Setting an application to "Received"
- 6 In progress – landlord and t...

Below each thumbnail is a black bar with the video title:

- Tenant application
- Logging in and your dashboard
- New applications
- Assigning applications to officers
- Setting applications to "Received"
- Setting applications to "in progress" (start of the 42 days)

APPENDIX ONE – SWAPTRACKER MERGE FIELDS

Listed below are the standard merge fields which when included in your letter templates will be automatically populated with the details from the application.

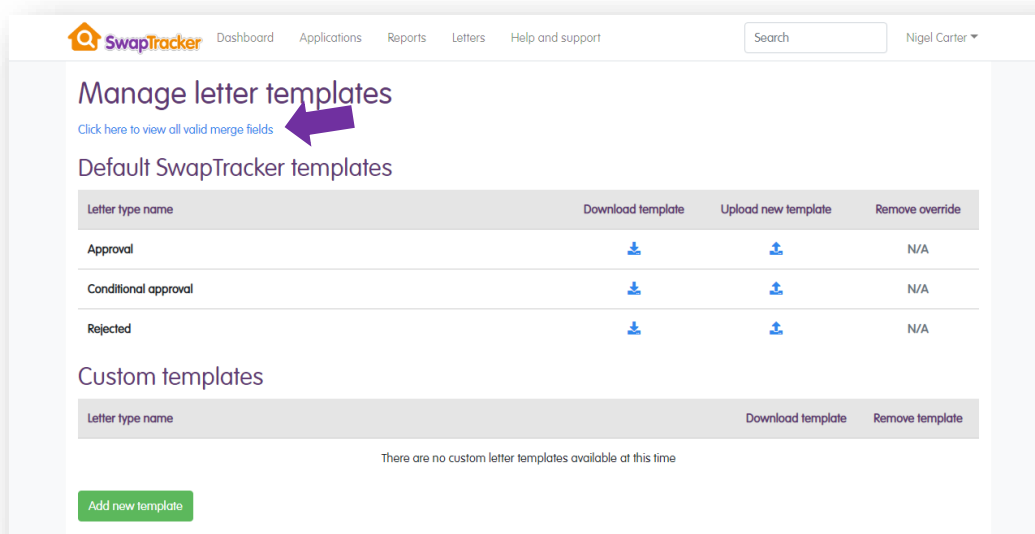
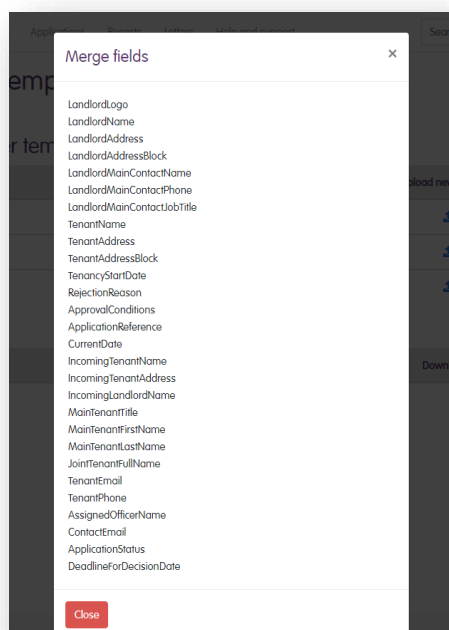
Merge field	Description
<u>General Application Information</u>	
ApplicationReference	The SwapTracker MX application reference number
ApplicationStatus	The status of the application, e.g. In progress, Approved, etc.
ApprovalConditions	Any conditions attached to the approval (applies only to Conditionally Approved applications)
AssignedOfficerName	The name of the person assigned to the application.
RejectionReason	Reason the application has been rejected (applies only to Rejected applications)
TenancyStartDate	Tenancy start date (applies only to Conditionally Approved and Approved applications) - dd/mm/yyyy format
DeadlineForDecisionDate	The date a decision is due by - dd/mm/yyyy format
ContactEmail	The contact email for the application.
TenantLandlordName	The name of the applicant's landlord.
TenantLandlordAddress	The address of the applicant's landlord (in one line)
TenantLandlordAddressBlock	The address of the applicant's landlord (in multiple lines)
<u>Main Tenant Details</u>	
MainTenantFirstName	The main tenant's first name.
MainTenantLastName	The main tenant's last name.
MainTenantTitle	The main tenant's title, e.g. Mrs, Mr, etc.
TenantAddress	The tenant's address (in one line).
TenantAddressBlock	The tenant's address (multiple lines).
TenantEmail	The tenant's email address.
TenantName	The tenant's full name.
TenantPhone	The tenant's phone number.
<u>Joint Tenant Details</u>	
JointTenantTitle	The joint tenant's title, e.g. Mrs, Mr, etc.
JointTenantFullName	The joint tenant's full name.
JointTenantFirstName	The joint tenant's first name.
JointTenantLastName	The joint tenant's last name.
<u>Main + Joint Tenant Details</u>	
TenantsFullNamesWithTitles	<p>If there is no joint tenant this will be the main tenant's title, first name and last name only, e.g. <i>Mr Bob Smith</i></p> <p>If there is a joint tenant this will be the main tenant's name and the joint tenant's, e.g. <i>Mr Bob Smith and Mr Barry Jones</i></p>
TenantSalutations	<p>If there is no joint tenant this will be the main tenant's title and last name only, e.g. <i>Mr Smith</i></p> <p>If there is a joint tenant this will be the main tenant's title and last name & the joint tenant's title and last name, e.g. <i>Mr Smith & Mr Jones</i></p>

	If they both have the same last name, they will be combined e.g. <i>Mr & Mrs Davis</i>
--	---

<u>Incoming Tenant Details</u>	
IncomingLandlordName	The name of the landlord of the incoming tenant.
IncomingTenantAddress	The address of the incoming tenant (in one line).
IncomingTenantAddressBlock	The address of the incoming tenant (multiple lines).
IncomingTenantTitle	The title of the incoming tenant, e.g. Mrs, Mr, etc.
IncomingTenantName	The full name of the incoming tenant.
IncomingJointTenantTitle	The title of the incoming Joint tenant, e.g. Mrs, Mr, etc.
IncomingJointTenantFullName	The full name of the incoming Joint tenant.
IncomingJointTenantFirstName	First name of the incoming Joint tenant.
IncomingJointTenantLastName	Last name of the incoming Joint tenant.
IncomingLandlordAddress	The address of the incoming tenant's landlord (in one line).
IncomingLandlordAddressBlock	The address of the incoming tenant's landlord (multiple lines).
IncomingTenantsFullNamesWithTitles	<p>If there is no incoming joint tenant this will be the incoming main tenant's title, first name and last name only, e.g. <i>Mr Bob Smith</i></p> <p>If there is an incoming joint tenant this will be the incoming main tenant's name and the joint tenant's, e.g. <i>Mr Bob Smith and Mr Barry Jones</i></p>

Miscellaneous	
CurrentDate	Today's date - dd/mm/yyyy format
LandlordAddress	Your organisation's address (in one line).
LandlordAddressBlock	Your organisation's address (multiple lines).
LandlordMainContactJobTitle	The main contact for your organisation's job title.
LandlordMainContactName	The main contact for your organisation.
LandlordMainContactPhone	The main contact phone number for your organisation.
LandlordName	Your organisation's name.

As a useful reminder, a full list of SwapTracker merge fields available to use, can be viewed by clicking “*Click here to view all valid merge fields*”.

APPENDIX TWO – TENANT REFERENCE FORM

Listed below are the questions asked in the tenant reference request form.

Tenant's household details

This section captures details of the tenant's household, i.e. anyone who will be moving with them.



This section is optional and by default we do not ask for this information.

If you do want this as part of your reference request form, please contact Housing Partners.

Tenancy/Property

Tenancy start date

Tenancy type

Property type

Number of bedrooms

Current weekly rent charged

Is the property specially adapted?

If Yes - Please give details

Are there any pets in the household?

If Yes - Please give details

Condition of property

Date of inspection

Tenant Details

Is the tenant in receipt of Housing Benefit or UC?

If Yes - Weekly amount received

If Yes - Please give details

Has the tenancy been conducted in a satisfactory manner?

If No - Please give details

Rent account status

Rent account balance

Has the tenant kept their rent account up to date in the past?

If No - Please give details

Has Succession Rights been used during the current tenancy?

Right to Buy / Right to Acquire Status

Do we consider any member of the household to be a Cautionary Contact?

If Yes - Please give details

Reports of Anti-social behaviour in relation to the tenant, household or visitors & details of this (if applicable)

Has a Notice of Seeking Possession been served?

If Yes - Please give details

Is there a current Notice served for rent arrears?

If Yes - Please give details

Is there a current Notice served for any other tenancy breach, e.g. anti-social behaviour / MAPA / RSO?

If Yes - Please give details

Other information

Please provide any other information relevant to the tenancy