

The SDM My Home Web Portal allows tenants, staff and other authorised users to carry out self service activities which link back to the Housing Management areas of the SDM System.

## Key Information / Main Features

### Integration with SDM

- Near Live two-way data synchronisation
- Diary entry creation action for forms, emails and other triggers, with optional file attachment

### Administration

- Editable system email templates
- Full administrator management
- Ability to create tenant accounts, reset passwords and change email addresses
- Audit history of tenant actions
- Add adhoc SDM diary entries with attachments against specific tenants
- Cash transactions can be added with email and printable receipts (synchronised with SDM)

### Dashboard

- Panels available depending on enabled modules
- Custom panels
- Editable panel width, titles, icons and link

### Account & Tenancy

- Automatic customisable tenant account registration with customisable alert
- Tenant self-management - changing password and email address (synchronised with SDM)
- Custom tenant online greeting (synchronised with SDM)
- Optional ability to opt in to be a participating tenant (synchronised with SDM)

- Tenant dashboard panel listing family members
- Tenancy dashboard panel with details of tenancy
- Ability to change phone numbers (synchronised with SDM)
- Ability to opt in and out of being paper free (synchronised with SDM)
- Ability to manage details of other occupants of property (synchronised with SDM)
- Confirmation whether tenant has right to buy (setup based on tenancy type)

## Calendar

- Browsable calendar content plug in
- Entries can include organisation and tenant specific events, i.e. stair cleaning, bin collection, office closure and rent due

## Rent Statement

- Rent dashboard panel with balance and last transactions
- Optional display of rent charge breakdown
- Mini current balance and rent statement content plugin
- Rent statement page with print option

## Repairs History

- Repairs dashboard panel with recent repair orders
- Recent repairs content plugin
- Repairs history page
- Repair appointments automatically added to tenant calendar
- Ability to give feedback on repairs

## Basic Repair Reporting

- Simple single form repair reporting (synchronised with SDM as diary entry or as job with default variables such as contractor, priority etc)

## Assisted Digital

- Authorised admin users can access and use the portal on behalf of a tenant
- Works irrespective of whether tenant has an online account
- Emails and diary entries created note action was carried out on behalf of tenant
- Audit logging on all actions
- Staff only pages, dashboard panels and other content including forms

## Make a Complaint

- Ability to start the formal process of making a complaint (synchronised with SDM)

## Basic CMS

- Ability to add, edit and delete content pages
- Fully editable main menu, footer menu and responsive menu
- Editable content regions with content plug-in components:
- WYSIWYG editor with customised styles and file / image manager
- Form builder

## Online Rent Payments

- Ability to pay rent online via payment gateway (e.g. Worldpay or Sage Pay) (synchronised with SDM)

## Digital Documents

- Access all documents attached to diary entries in SDM (excluding internal only documents)
- Document folder content plugins
- Recent documents dashboard panel

- Recent documents page
- Send documents (synchronised with SDM)

## Survey Module

- Custom surveys for tenants to complete
- Surveys can be completed many times or only once by tenant
- Automatic publishing and archiving
- Surveys can be limited to specific tenants
- Open surveys dashboard panel
- Standalone surveys that can be assigned to specific tenants for a specific time

## Customer Groups

- Ability to group customers into groups
- Customise which dashboard panels, pages and content text appear to different customer groups
- Add calendar events for specific customer groups
- Make surveys only visible to specific customer groups
- Change access to functionality according to customer group
- Support for factored owners / leaseholders

## CMS Upgrade Pack

- Additional content plug-in components:
- FAQs
- Case studies

## Advanced Repair Reporting

- Ability to cancel a repair and reschedule an appointment\* (synchronised with SDM)



- Ability to cancel repairs\* (synchronised with SDM)
- Advanced repair reporting with third-party repair pickers (for example Interfinder) and appointment scheduling\* (synchronised with SDM)
- Ability to report large repairs requiring inspection (synchronised with SDM)
- Variable priority codes, nominal codes and trade codes depending on repair reported (synchronised with SDM)
- Customisable non-graphical repair picker
- *some functionality requires or can support integration with scheduling systems, e.g. DRS*

## Staff Repair Reporting

- Only accessible by authorised staff
- Search by property or tenant
- View repair orders
- Ability to cancel a repair and reschedule an appointment\* (synchronised with SDM)
- Ability to cancel repairs\* (synchronised with SDM)
- Ability to report a repair (using same mechanism to tenants) (synchronised with SDM)
- *some functionality requires or can support integration with scheduling systems, e.g. DRS*

## Self Service Website

As well as a standalone portal, My Home can be delivered as a fully featured website with both public functionality, tenant self-service functionality, and staff remote working tools.

## Integration

The SDM My Home Web Portal Module integrates with:

- Rents & Housing Management Module Tenant and Property Databases



# My Home Web Portal



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- Repairs and Maintenance Works Order Database
  - It also interfaces with a Cloud Based Digital Changes Database which passes transactions back and forward between SDM and the web Portal Interface that tenants, staff and other authorised users would use.

