

# Portal Guide

As a resident, you will have access to our resident's portal in which you can do a number of different things. It gives you access to your very own account 24/7, 365 days a year, a quick and easy way to keep track of your property.

You can do a number of different things on the portal, such as, make payments, monitor live progress of works, access all necessary forms, view up to date statements of your account, access to useful documents and useful contacts. Here is a quick and easy guide on how to use the portal.

## Step one:

To login to your portal you need your user-name and password, both are assigned to you along with your welcome pack.



### Tenant Web Portal Login

Please enter your Username and Password\* to access the Residents Portal or alternatively return to Trinity Estates.

*\*Passwords are case sensitive.*

Username:

Password:

Remember my Username (We'll need to set cookies to do this. What is this? )  
Note: You should not save your Username on a public computer.

**SUBMIT**

[Please click here if you have forgotten your Username](#)

[Please click here if you have forgotten your Password](#)

Once you have logged in, you will be taken to the residents home page. On the left hand side there is a list of things you can do. This includes information about your property, information on your account and service charge. Along with any useful documents and contacts; including a way to change your personal details.



### Selected Property

My Property	+
My Statement	+
Contact Us	+
My Details	+

#### Welcome to your Residents Portal

*A smarter approach to your managed property*

The Residents' Portal provides a number of features which are detailed below.

- Manage your account and make payments online
- Track maintenance progress on your development
- Access your statement of account
- View important documents, such as final accounts, insurance certificate, service charge budget and more.
- Contact us using the forms provided; alteration consent, change of address, letting consent, maintenance request etc.
- Select your correspondence preference, email, post or both (Change Preferences under the My Details menu option on the left)

If you experience any issues with the portal please contact our web support team on [websupport@trinityestates.com](mailto:websupport@trinityestates.com).

## Step two:

To make payments, look under 'My Statement'. Payments can be made under 'make payment'; this will only appear if there is an outstanding balance.



### Make a Payment

- My Property +
- My Statement -
- Statement of Account
- Make a Payment
- Contact Us +
- My Details +

Manage your account and make secure payments.

Select which payment(s) you would like to make below and click 'Continue' to proceed.  
Please note that part payment is not available using this method.

Transaction:  Summary  Details

UPDATE

Balance Outstanding: GBP 215.46

Date	Details	Debit	Credit	Select	Payment Amount
30 May 2019	Water Charge to 05/03/19 Ref: 2988464	78.37		<input type="checkbox"/>	78.37
01 Jul 2019	Service Charge Ref: 2994738	137.09		<input type="checkbox"/>	137.09
Total to pay					GBP 0.00

#### Payment Information

Total to Pay: GBP: 0.00

#### Card Information

Forename:   
Surname:   
Email:

CONTINUE

You can also find information on how much service charge is due and when it needs to be paid by. This is found under 'My Statement' and then you need to click on 'Statement of Account'.



### Statement of Account

- My Property +
- My Statement -
- Statement of Account
- Make a Payment
- Contact Us +
- My Details +

To view a statement of your account, amend the date range or specify detail/summary and select the Update button.

Use the Adobe button to download the statement.

Transaction:  Summary  Details

From: 01/01/2014

To:

UPDATE

Balance To Pay: GBP 215.46

Date	Details	Debit	Credit	Balance
20 Oct 2016	Receipt Ref: Web 20/10	0.00	117.65	-117.65
31 Oct 2016	Water Charge Period 11/02/2016 - 27/07/2016 Ref: 2142128	16.50	0.00	-101.15
01 Nov 2016	Service Charge Period 01/11/2016 - 30/11/2016 Ref: 2124075	117.65	0.00	16.50
14 Nov 2016	Receipt Ref: KEYIVR1411	0.00	251.80	-117.65
01 Dec 2016	Service Charge Period 01/12/2016 - 31/07/2017 Ref: 2145988	0.00	117.65	-235.30
01 Dec 2016	Service Charge Period 01/12/2016 - 31/07/2017	0.00	822.26	-1,057.56

## Step three:

To find out information on your property, including who your property manager is, look under 'My Property'.



## Useful Contacts

- My Property** -
- Property Information
- Property Job Maintenance
- Property S/C Expenditure
- Useful Contacts
- My Statement** +
- Contact Us** +
- My Details** +

Find all your useful contacts here.

Property Manager - Rebecca Eddy (SW)  
Email: rebecca.eddy@trinityestates.com  
Phone: 0345 345 1584

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Under 'My Property, you will find out any relevant information about your property, including any useful documents regarding your property. You can also find out any active job maintenance, along with the current service charge expenditure. Here you can also find information on parking plans, along with documents such as a noise leaflet, which will help you adhere to your responsibilities regarding noise.

### Property Information

Our Useful documents archive has a number of documents from service charge budget to insurance documentation

Useful Documents		
VIEW DOCUMENTS		
	Final Accounts 15-17	01/02/2018
	Insurance Certificate	02/07/2014
	PPM Report	03/07/2013
	Service Charge Budget 13-14	17/07/2013
	Final Accounts 12-13	30/07/2014
	Minutes of NDRA Meeting - 12th December	27/01/2014
	Service Charge Budget 14-15	12/08/2014
	Final Accounts 13-14	21/01/2015
	Service Charge Budget 15-16	01/07/2015
	Final Accounts 14-15	11/12/2015
	Sub-Let	30/06/2016
	Service Charge Budget 16-17	08/07/2016
	Final Accounts 15-16	31/01/2017
	Service Charge Budget 17-18	03/07/2017
	2018/19 Service Charge Budget	29/08/2018
	Final Accounts 17-18	31/01/2019
	Water Reconciliation Period 17/10/2017 - 15/03/18	01/06/2018
	Water Reconciliation Period 16/03/2018 - 23/08/18	30/10/2018
	Newsletter April 2017	12/05/2017

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### Property Job Maintenance

View active maintenance jobs here.

Job: 358593 (29/10/2018)  
Location:  
Type of Work: Reactive  
Status: Purchase Order

VIEW NOTES

EC35 29/10/2018 16:26

Please attend the above development to undertake the following works;

To tidy the locks at the above block. The locks are basically epoxy resined in place (actually upside down) and you can see all the filler as there are no lock surrounds or finger plates. Please resolve these issues Lock works

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## Step four:

If you are looking to make any amendments or have any requests, you can find this information under Contact Us:

All of our forms can be filled in via the portal, you can also fill out maintenance requests if something has gone wrong.

Here is an example of a form you can fill in.

## Contact Us

Alteration Consent  
Amend Property Detail  
Change of Address  
General Enquiry  
Key Request  
Letting Consent  
Maintenance Request  
Pet Consent



- My Property +
- My Statement +
- Contact Us -
- Alteration Consent
- Amend Property Detail
- Change of Address
- General Enquiry
- Key Request
- Letting Consent
- Maintenance Request
- Pet Consent
- My Details +

### Alteration Consent

To request consent to make alterations to your property, please complete the form below.

Please attach the following documents/photos below: plans, proof of planning permission (if required) and a full spec of the work. Alternatively please post them to our head office for the attention of our surveying team.

There may be an additional charge for this service.

Title	<input type="text" value="Mr"/>
Full Name *	<input type="text"/>
Phone Number	<input type="text"/>
Email Address *	<input type="text"/>
Property Address (including Post Code)	<input type="text"/>
Is this a	<input type="radio"/> Ground Floor Apartment <input type="radio"/> First Floor Apartment <input type="radio"/> House <input type="radio"/> Other
If Other please specify	<input type="text"/>
Intended date of works *	<input type="text"/>
Alteration Details *	<input type="text"/>
Upload Attachment	<input type="button" value="Upload"/>

## Step five:

If you need to change any of your personal information, such as your email address, you can do this under the 'My Details' section.



### Change Email Address

- My Property +
- My Statement +
- Contact Us +
- My Details -
- Change Email
- Change Username
- Change Password
- Change Preferences

Once the amended email address has been specified, you will be sent a link to confirm the email change.

*Please check your spam/junk email folder if you cannot find the verification email in your inbox.*

Enter a NEW email address and re-enter it to confirm the change.

Email Address:

Confirm Email Address:

Password:

**CONFIRM**

\*All fields are mandatory



### Change Username

- My Property +
- My Statement +
- Contact Us +
- My Details -
- Change Email
- Change Username
- Change Password
- Change Preferences

Update your Username below

NOTE: You will need to login again using your new Username after you have entered it and confirmed the change. When your Username has been validated we will take you back to the login screen automatically.

Original Username:

New Username:

Password:

**CONFIRM**

\*All fields are mandatory