help the move

How To Guides

Using SME with Helpthemove

Welcome to your guide to using SME with Helpthemove

We know you're already familiar with using SME, but with Helpthemove, there are a few key requirements to keep in mind, which may differ from your current process. This guide highlights these, helping you update SME correctly so data flows smoothly through the API.

By following these steps, your landlords and tenants will benefit from accurate utility statements and you will avoid erroneous energy switches, incorrect notifications, or missed updates to suppliers.

If you have any questions, we're happy to help!

The Helpthemove service is reliant on you providing timely and good quality data. We therefore ask that you keep SME as up to date as possible with any changes of circumstances to planned move dates and with accurate data in all fields that we process for you.

We're typically interested in who is moving out and when and who is moving in and when, but please find a full list of fields that we process at the back of this user guide.

The Helpthemove journey usually starts with a Move Out. We strongly recommend updating the move out date as soon as you receive notice, and ideally 14 days in advance of the move out date. This supports our energy partner to line up the energy switch for day one of the void period.

Please note that Helpthemove should only be informed about move outs where all tenants are vacating and bills responsibility transfers to the landlord. We'll show you in this guide how to exclude any Move Outs where one or more tenants are remaining in occupancy.

Following the Move Out, we then become interested in the Move In. This is so we can notify for the utility accounts to be transferred from the landlord to the new tenant/s. We strongly recommend updating the move in date as soon as a new tenancy agreement has been completed.

Below are a few rules which explain which of your actions within SME determines when we receive the Move Out, the Move In and any cancellation or change in relation to these dates.

Move Statuses

Move-Out Status
Helpthemove will receive the Move Out record once the status in SME has been updated to "Move-Out Date Given."

Move-In Status
Helpthemove will only receive a Move In record once the status in SME has been updated to "Awaiting Move-In." This status confirms that all referencing checks have been successfully completed.

Cancelled Move-In or Move-Out
In the event of a cancellation, Helpthemove will update the record accordingly and notify the relevant energy provider, council, and water supplier that the move will not proceed.

Helpthemove will only receive a cancellation once the status in SME has been updated to "Fall Through".

Important:
If a move is cancelled after the scheduled move date, an energy switch may have already been completed, and notifications to the council and water providers may have already been processed. In these instances, Helpthemove's dedicated Customer Support team will be in touch to discuss the next steps.
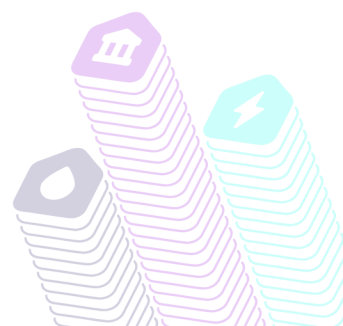
Change of Sharer

When you are ending a tenancy, but one or more tenants remain in occupancy, tick the box in the "renewing" column for those that remain.

Where a tenancy has one or more renewing tenants this record will not be processed via Helpthemove and this prevents an unintentional energy switch whilst tenants remain in occupancy.

Please Note:
The current energy provider, council, and water providers will *not* be notified or asked to update their records to reflect the change in tenancy for any tenants that are vacating. This should be completed by the tenants themselves.

Tenancy Renewal

If all tenants in occupancy extend their tenancy agreement beyond the original fixed term, tick the "renewing" column for those that are renewing to ensure that Helpthemove is not informed of a Move Out:

New Instruction

A New Instruction is where you have acquired a property to your portfolio that is currently void and that you intend to find a tenant for.
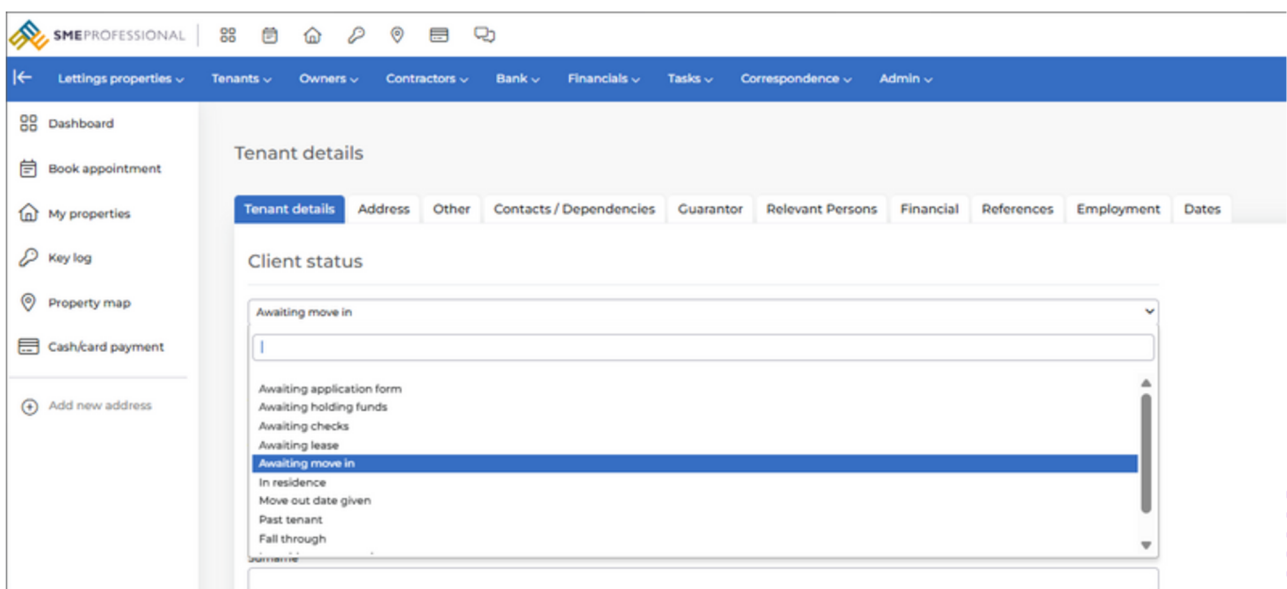In these instances we ask that you follow the Move-In journey on SME. Once the move in has been scheduled we automatically process your instruction for our Energy Partner to switch the supply the day before the tenancy Start Date. For a successful Energy Switch, we require a minimum of 2 days between the day you create the Move In and the Tenancy start date.

Helpthemove will only receive a Move In record once the status in SME has been updated to "Awaiting Move-In." This status confirms that all referencing checks have been successfully completed.

If you acquire a property whereby a tenant is in situ, please ensure you update the properties status on SME to show as 'In Residence' to avoid any confusion.

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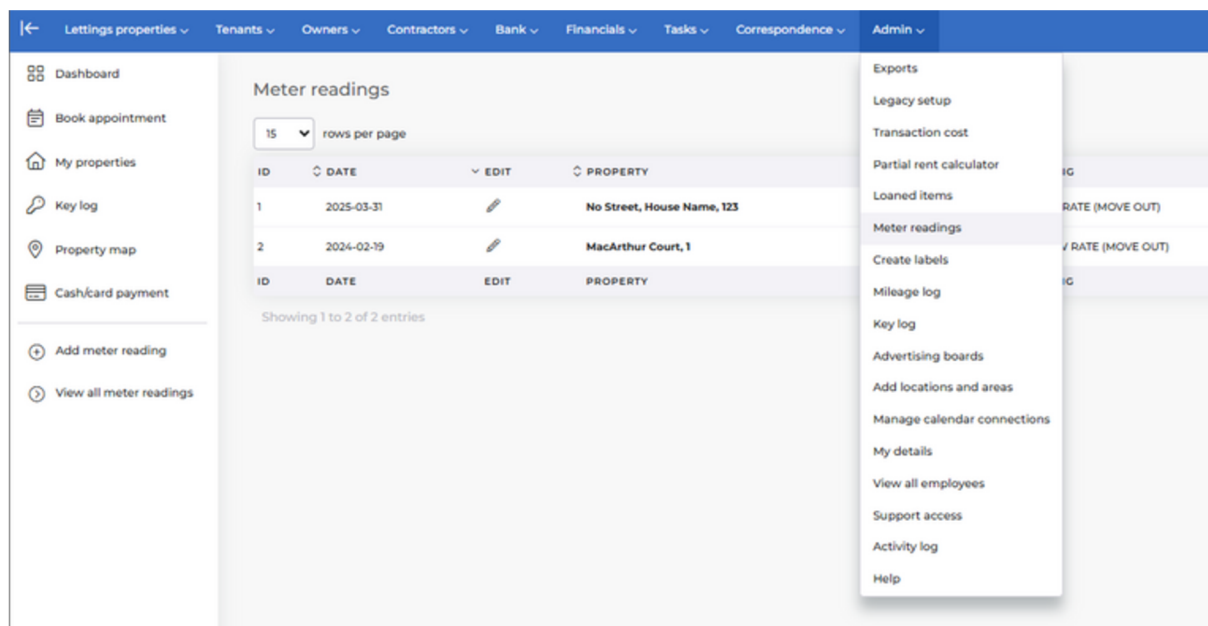This screenshot covers the two scenarios that have been listed in the New Instructions journey.

Go to tenants and create tenancy. Select the address of the property. Ensure all tenants have a status of 'Awaiting Move In' if it's a new instructions and 'In Residence' if the property has a tenant in situ.

Meter Reads

To ensure accurate billing, meter readings must be entered within two days of the move date listed on SME. This allows OVO to open and close the void period using actual meter readings, rather than relying on estimates. Submitting timely and accurate reads ensures that bills reflect true usage and allows you to maximise the benefits of any free standing charge periods and fuel credits.
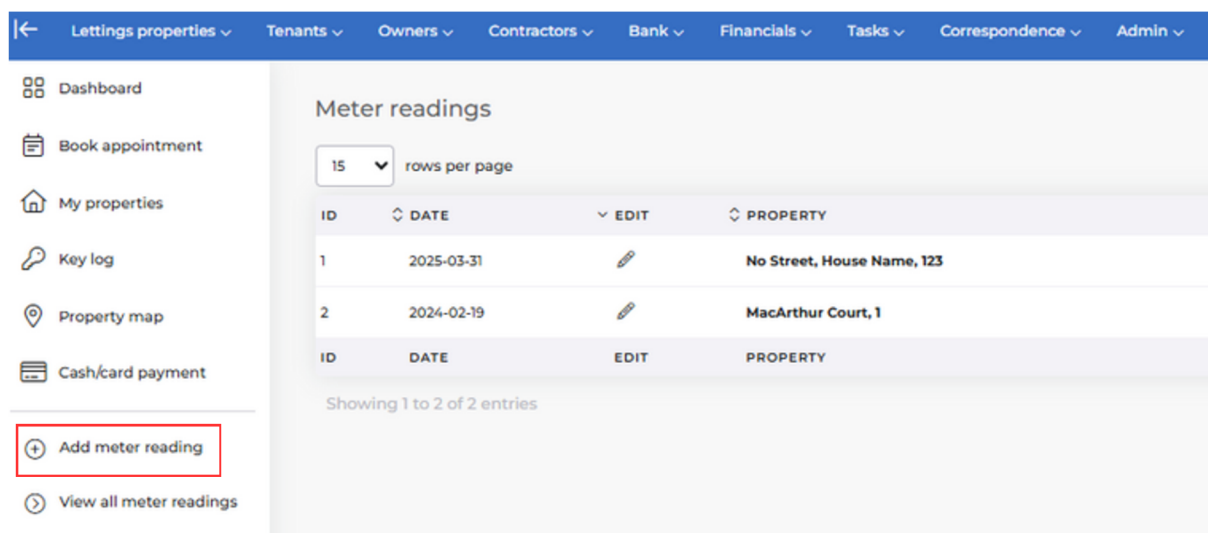

Go to Admin and then to Meter readings. Click on Add Meter Reading from the left sidebar

Meter Reads

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A pop-up will appear where you will be prompted to provide all the required details. Please ensure you select submit at the bottom of the screen.
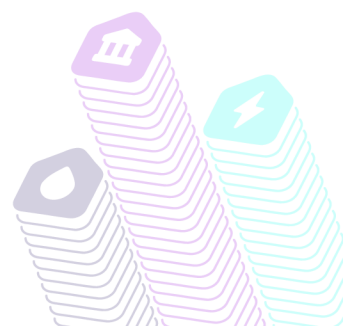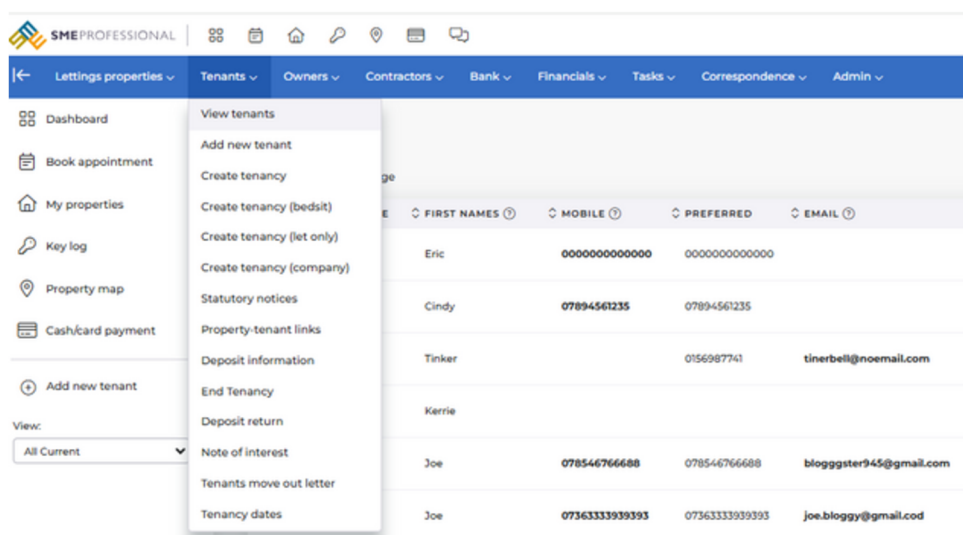
Amending Move In and Move Out Dates

If there is a change to the Move In or Move Out date, it is essential that this information is promptly updated on SME. This enables Helpthemove to capture the amendment and reflect it accurately within our records and processing activity.

If the revised move dates are in the future, the portal will be updated accordingly, and no further action will be necessary.

If the Move In or Move Out has already occurred, Helpthemove will notify the relevant parties—including the local council, water supplier, and energy provider (OVO)—of the updated details.
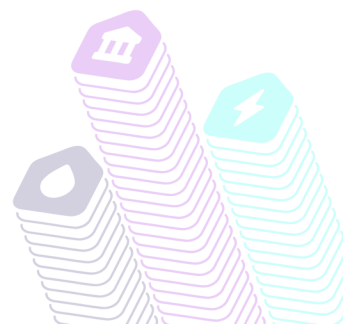
Should any additional steps be required, a member of our customer service team will contact you to advise on the next course of action.

Click on tenants and then select view tenants.
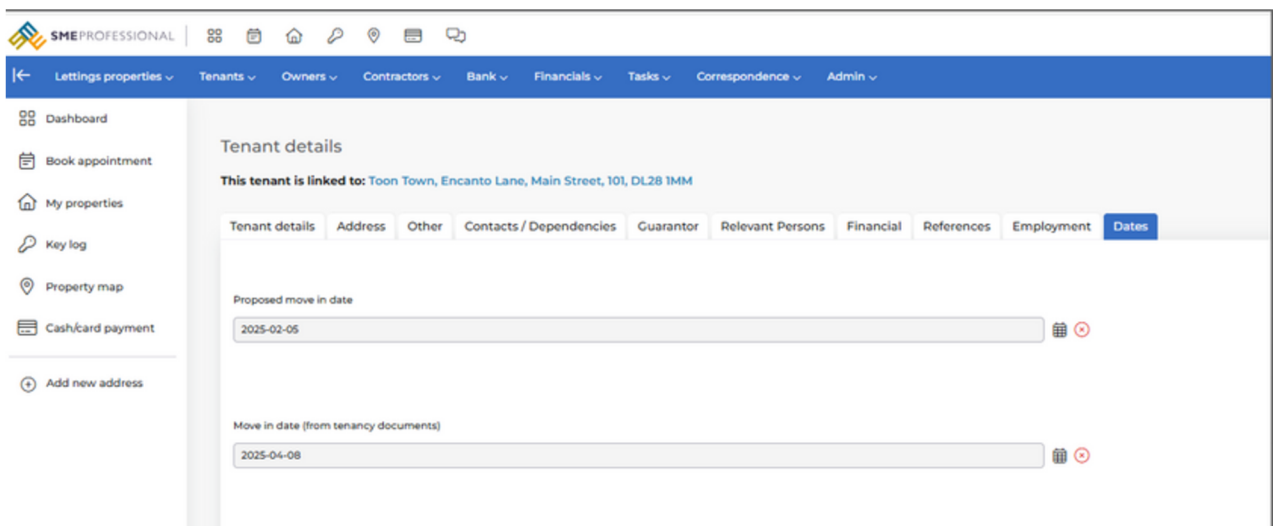
Amending Move In and Move Out Dates

Continued

Click the pencil Icon and navigate to dates.

Amend the date and select update tenant.
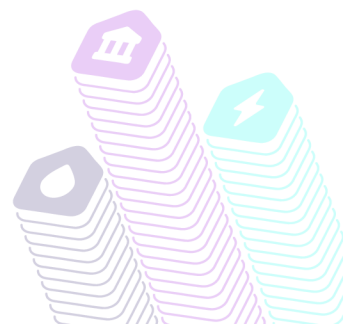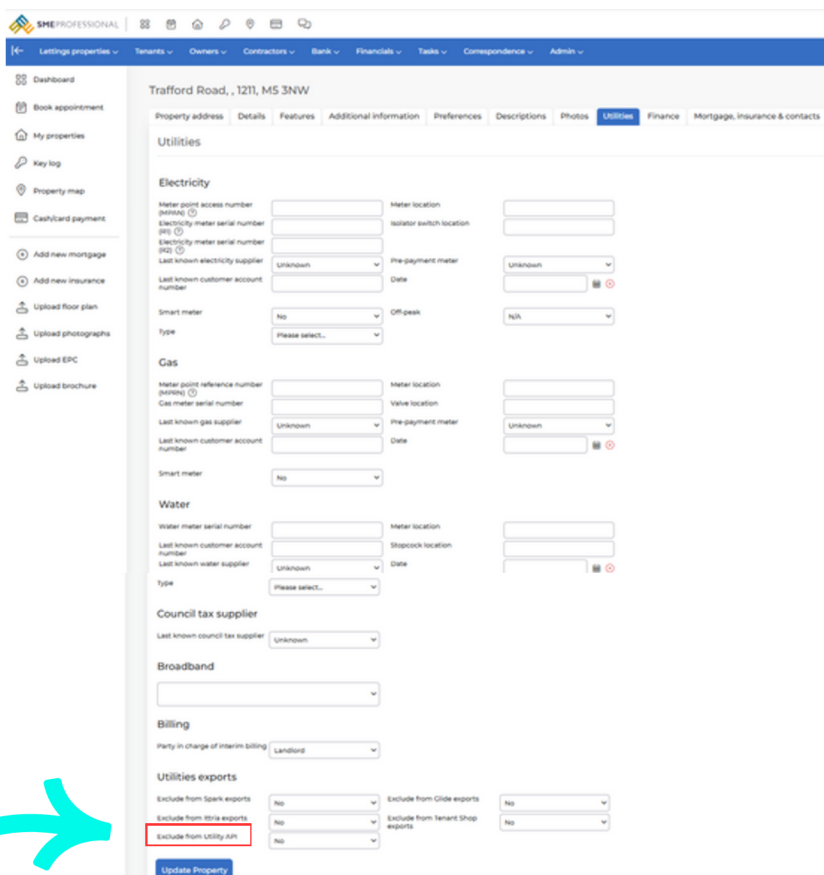
Exclude from Utilities

This feature should be used only in specific instances where you do not want Helpthemove to initiate an energy switch or notify the council or water provider of a change in responsibility.

Examples:
- Properties with commercial meters
- Rent collection-only agreements (unless you provide utility notifications as value-add to these landlords too)
- Garages
- Individual rooms

To exclude a property. Go the utilities page and from the "Exclude from Utility API" drop down at the bottom of the page, select "Yes".

Please Note: While this status is active, Helpthemove will have no visibility of the property, and no notifications will be sent to the council or water providers.
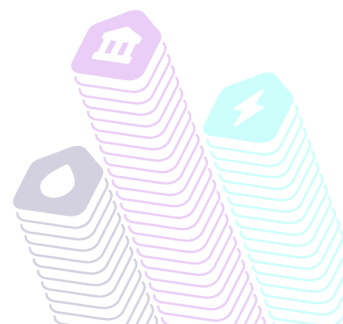
Removed From Portfolio

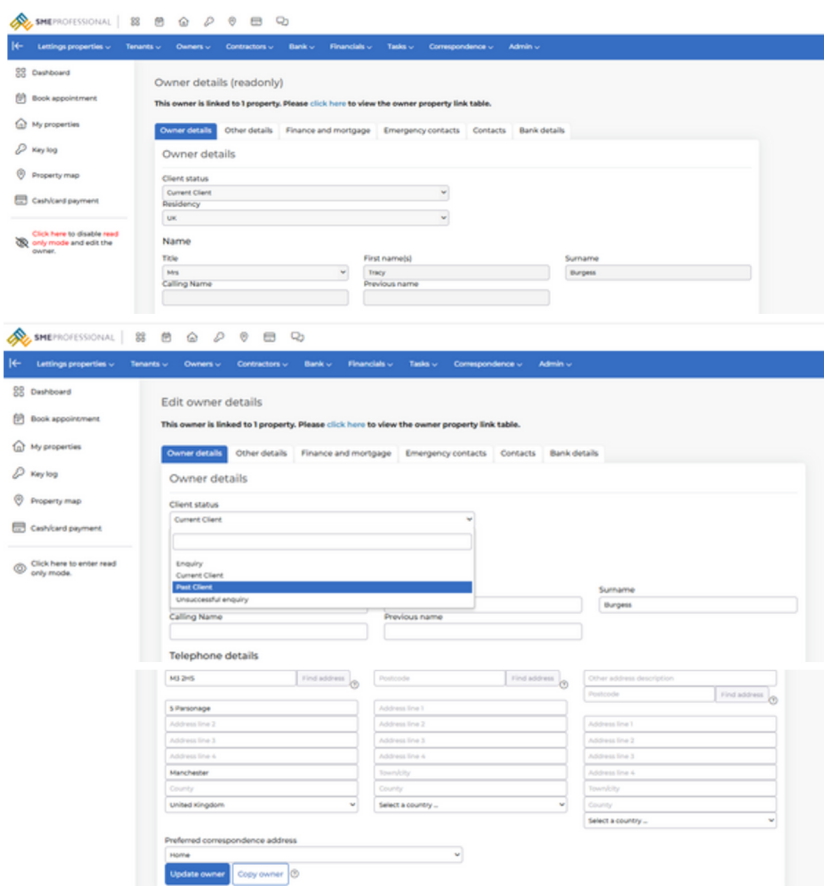Helpthemove uses archived landlord records to identify when a property is to be "Removed from Portfolio". This applies when a landlord has removed their property from your management, meaning Helpthemove should not process any future notifications or energy instructions in relation to this property.

To ensure smooth transitions and avoid unnecessary manual notifications, landlords should be marked as "Archived" only after all scheduled tenant moves have been completed, unless of course the landlord specifically instructs you to cease processing for them altogether. In such circumstances, we'd encourage you to contact our Customer Support team to ensure no action is taken on any scheduled moves already received.

Marking a property as "Removed from Portfolio" signals to Helpthemove that authority has been revoked, preventing further actions or notifications from occurring.

If a property has been mistakenly marked as archived, please contact our Customer Support Team so we can promptly correct this on the Helpthemove portal and ensure your service remains uninterrupted.

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Thank you for taking the time to review our guide. We appreciate your effort in ensuring a smooth process when using SME with Helpthemove.

If you have any questions or need further support, please don't hesitate to get in touch:

🌐 https://helpthemove.co.uk/

📞 0161 399 0247

✉️ support@helpthemove.co.uk