

Birch & Hollow

Customer Portal Discovery

Commercial Linen and Laundry

Prepared for Mara Ellison · 14 September 2026

My recommendation

I recommend a focused custom portal connected to your existing delivery records. Customers can review completed deliveries across their authorized hotels, open original slips and understand approved corrections without Nina assembling the same information again.

Your request concerned online paperwork. Following Helen's weekly review clarified that customers need the delivery record, approved correction and original evidence together. Your route office continues to control posting and corrections.

Start with 90 days of history and a pilot at Willow Court Inn, Meadowbank Hotel and Parkside Lodge, then extend access to all 24 current hotels.

First-release implementation is **CAD \$5,500 fixed**, with approximately **six weeks** for delivery, including two weekly customer reviews. Optional managed operation has a separate **CAD \$150–\$250 monthly allowance**. The implementation proposal records the agreed scope and charges before work begins.

What Discovery clarified

Your initial enquiry:

Our office spends a lot of time emailing copies of delivery slips, sometimes to several people from the same customer. Could we give customers a login to find their own delivery history and paperwork?

Discovery changed the project in three ways

- 01 Weekly review, not just document download
- 02 Corrections need context beside the slip
- 03 Access follows property and delivery-period authorization

A weekly review needs more than slips

01 · Helen is reviewing a week across several hotels.

Helen Grant reviews deliveries for Northmere Hospitality's three properties, comparing them with each hotel's receiving information and identifying questions that need an explanation.

Nina retrieves the ledger entries and slips, then adds correction explanations. A local housekeeping manager may separately request some of the same material.

The portal should organize that work into delivery history filtered by authorized hotel and date range, with slips beside their records. Regional and local staff can refer to the same information.

02 · D-417 needs its correction explained.

Willow Court's delivery on 10 September shows why the slip alone does not finish the enquiry:

Bath towels · D-417 · line L2

Signed slip S-417 10 September 240 towels Original evidence	Initial office entry Before correction 260 towels Conflicting office record	Joel's approved correction 11 September 240 towels Corrected to match S-417
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The difference was an office entry error. It does not establish that 20 towels were missing. The original slip remains unchanged.

The delivery view should show the approved quantity, dated explanation, earlier value and original slip together. Accounts continues to handle invoicing and financial adjustments.

Access follows each hotel’s authorization

Helen’s access depends on Northmere’s appointment at each hotel. It should not automatically extend to other properties or continue unchanged after an appointment ends.

Parkside’s planned 1 October management change makes that boundary concrete:

Northmere / Helen Grant Access within approved delivery periods		
Hotel	Before 1 October	From 1 October
Willow Court	Authorized	Stays authorized
Meadowbank	Authorized	Stays authorized
Parkside	Authorized	No access to new deliveries Earlier history: express approval only

Earlier Parkside history

Northmere retains it only if the service-account authority expressly approves it.

Incoming Parkside manager

Receives the approved delivery period; any earlier history is separately authorized.

A hotel’s housekeeping manager reviews only that hotel’s authorized history.

An October correction to a September delivery remains part of September’s history, with the same access rules.

Person	+	Property	+	Delivery period	+	Authorizing contact
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Nina records the person, hotel, permitted delivery period and authorizing contact. Removing access must also prevent further document downloads and exports. Copies already downloaded remain subject to the existing customer follow-up process.

What customers would open

The first release needs two main customer views:

- **Delivery history:** choose one or more authorized hotels and a date range, or find a delivery by reference. Review posted items, quantities and units, then export the permitted history for that selection.
- **Delivery detail:** open the approved record, original signed slip and dated correction explanation together. See when the information was published and how to contact the office about an unresolved question.

Two views of the same approved record

Delivery history		Helen Grant
Hotels: all three authorized hotels		7-13 September 2026
Hotel / delivery	Item	Approved
Willow Court · D-417 10 September	Bath towels · L2	240 towels Correction recorded
Find by reference		Export permitted selection

Selected delivery: D-417 · Willow Court Inn		10 September 2026
Bath towels · L2: 240 towels		
Earlier entry: 260. Joel corrected the office entry to match the signed slip on 11 September.		
Original signed slip · S-417		Question? Contact Nina

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Screen outlines to clarify scope; final layout is agreed during the build. One delivery is shown here.

The views support weekly desktop review and delivery lookup on a phone, with individual invitations and sign-in recovery.

The first import covers the previous 90 days. New deliveries accumulate from there; earlier records remain in the office archive. Expand the initial history later only if customer use justifies it.

The release includes Nina's staff controls for invitations, hotel/history permissions, removing access and withholding incorrect paperwork. Joel continues to resolve source errors.

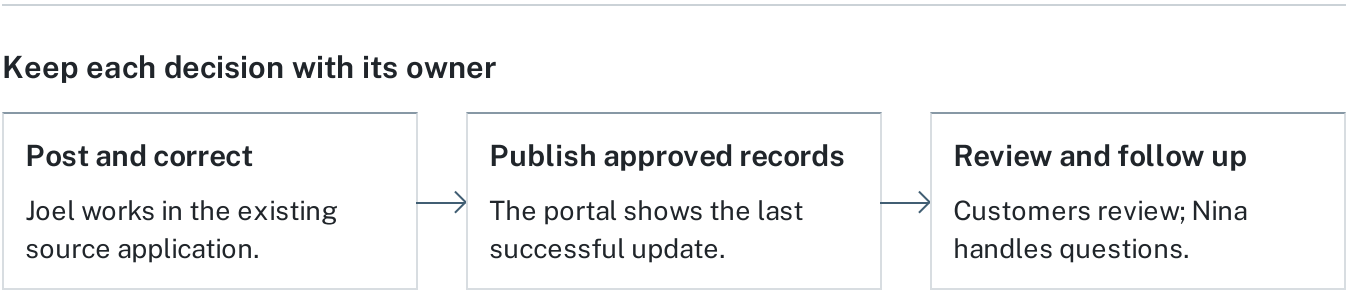
Ordering, route planning, live vehicle tracking, payments and invoice calculation remain in their existing processes. Quantities retain their recorded units: six bags of used linen cannot be treated as six pieces or used to calculate linen losses.

When customers can rely on the information

The publication target is **9 a.m. Alberta time on the next office business day after posting**. A Friday correction appears in Monday's review when Monday is an office business day. Each view shows the last successful publication time.

Situation	What happens
A delivery is posted but its slip is unavailable	The approved quantities remain visible, with “Signed slip unavailable” and the office contact.
A correction is still being investigated	Customers continue to see the approved record. An unresolved amendment is not presented as a confirmed change.
Publication is delayed	The previous information remains available with its actual date and a delay message. The technical operator investigates; Nina handles customer follow-up.
A slip is attached to the wrong delivery	Nina can withhold it immediately. It stays unavailable through later updates until Joel resolves the source issue and its release is authorized.

Revoking a departing employee's access takes effect immediately; permissions do not wait for the next publication.



Build around what is already working

What Discovery confirmed

Your records have stable delivery references and linked original slips. Joel's process retains previous values and correction explanations, and the reviewed export carries the information needed for the customer view.

Scheduled delivery and correction exports can feed the portal with linked paperwork. Staff continue posting and correcting records in the existing application, without maintaining a second customer ledger by hand.

Helen's weekly review needs completed records. Next-business-morning publication fits that task; immediate receiving shortages still go through Nina or the route office.

Choosing the implementation approach

The comparison follows Helen's review task and the work Birch & Hollow must maintain:

Approach	Customer outcome and operating consequence
Continue with the internal application and emailed records	Helen receives the information, but Nina still assembles each response. The internal application remains the source for the portal.
Configure a portal builder such as Softr	Offers a starting point for Helen's review. The export connection, correction explanations and protected document access still need configuration and maintenance around Birch & Hollow's rules.
Recommended Build a focused portal around the existing exports	Designed to let Helen review the records and explanations together while the office retains control of corrections and access. The build covers that workflow directly.

Softr documents [ready-made views](#) and [access controls](#). I compared those capabilities against Birch & Hollow's source format and the agreed customer workflow.

Both approaches still need the export connection and controlled delivery of private slips. **The focused build brings that work together for these two views without adding a portal-builder platform.** Replacing the operational system is outside this project.

Build, pilot and acceptance



The pilot falls after Parkside's management change. Helen reviews Willow Court and Meadowbank; Parkside's incoming authorized contact reviews its current deliveries. Test Helen's access to September Parkside records only where continuing historical access has been expressly approved.

The six-week estimate covers elapsed delivery time, including pilot reviews. It is not six weeks of full-time development. Timing depends on access, office feedback and customer availability.

Before wider rollout, demonstrate five things

- ☐ Helen can complete a weekly review for her authorized hotels without Nina resending records. Parkside's incoming contact can independently review that property's current deliveries.
- ☐ D-417 shows the approved 240 towels, the earlier 260 entry, Joel's explanation and unchanged S-417 together.
- ☐ The local and regional access rules work across records, documents and exports, including the Parkside transition and a revoked user.
- ☐ Missing paperwork and delayed publication remain understandable, and a withheld document stays unavailable until deliberately released.
- ☐ Nina and her backup can invite users, change grants and withhold paperwork; Joel can resolve a correction through the existing source process and see it published correctly.

Nina should measure retrieval requests and handling time for the same three hotels over comparable periods before and during the pilot. Separate routine retrieval from investigations and note where customers still need help. This provides evidence for rollout without assuming savings in advance.

Scope and cost

Item	Proposed commercial basis
First-release implementation	CAD \$5,500 fixed , excluding applicable taxes. Includes the single export/archive connection, 90-day initial import, customer views, downloads/export, essential staff controls, acceptance work, pilot, rollout to the current 24 hotels and handover.
Delivery	Approximately six weeks from the agreed start and availability of the required access and participants.
Managed operation	Optional: allow CAD \$150–\$250 per month , separately from implementation and excluding applicable taxes. Covers hosting, backups, routine maintenance, publication monitoring and response to operating faults. Additional support and development are quoted separately.

The build price is fixed for this first release. The implementation proposal records the scope and confirms the optional monthly charge and operating responsibilities for approval before work starts. Completed Discovery is invoiced separately and excluded from the build price.

The fixed price assumes one export format and slip archive, 24 hotels and one shared workflow. Historical archive cleanup, source-application changes or additional workflows require a revised proposal before implementation begins. Missing paperwork will be reported; recreating originals is excluded.

Keep the office in control

Optional managed operation gives the office a named technical contact while retaining control of records and customer relationships:

Owner	Ongoing responsibility
Joel	Posted delivery records, correction explanations and resolution of source/document errors.
Nina, with Mara as backup	Customer invitations, approved property/history grants, departures, document withholding and ordinary customer questions.
Featherply under the agreed operating arrangement	Hosting, publication monitoring, backups and recovery checks, routine updates and business-day response to operating faults. Source issues go to Joel; additional support and development are quoted separately.
Mara	Approve costs and scope, accept the rollout and authorize changes to the operating arrangement.

Handover includes the agreed application source, data export, deployment and operating instructions, and a staff walkthrough. The proposal records ownership and account access so another maintainer can take over if you choose.

Your next decision

I recommend proceeding to the implementation proposal for this first release.

- **Nina:** Prepare approved pilot contacts and hotel/history grants, including Parkside's incoming contact and the decision about earlier records.
- **Mara:** Decide whether to proceed; confirm the operating arrangement and coordinate the two review dates with the pilot participants.

The access rules, correction example and publication procedure can guide office responses now and become the basis for the portal's build and acceptance.