



Property Management Portal User Guide



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What is clifix®

clifix® is an award-winning defect management & resolution platform, designed by construction professionals to help solve the headache and admin burden associated with customer care.

- ✓ Cloud-based
- ✓ Transparent Communication
- ✓ Audit Trail
- ✓ Real-time
- ✓ Unlimited Users
- ✓ Collaboration

Further information on the following can be found on the help section of the clifix® homepage, where you can also watch a short overview video.



Activity Dashboard & Overview

Once you have signed in, you will see the latest activity and comments across your clixifix® suite on respective schemes and plots



Property Management Portal Demo powered by clixifix®

1AM - Sandbox Account

Activity Tickets Inspection Lists Calendar Discussions Schemes Reports

Schemes Quick Links

Scheme	Actions
Property Management Demo -	

Property Management Portal Demo powered by clixifix®

1AM - Sandbox Account

Activity Tickets Inspection Lists Calendar Discussions Schemes Reports

Back Scheme Documents (0)

Property Management Demo -

Property Management Demo
Demo Street
Demo Lane
Demo City
DEO OMO

Warranty
12 months

Ticket KPI

Property Management Demo -

Plot (1) Scheme Discussions (0)

Plots

Plot Postal Address	Handover Date	Status
1 - 1 Demo Street, Demo Lane, Demo City, DEO OMO	11/1/2022	active



Adding Documents & Discussions

Property Management companies have ability to add discussions to a plot record and include any supporting documents. Account users are notified

How to create a Discussion:

1. Title (e.g. Defect Response Time)
2. Detail (e.g. Can you advise what your defect response time would be for a broken tile?)
3. Add file (if applicable)
4. Submit

New Discussion for Property Management Demo -

Back

Property Management Demo -
Property Management Demo
Demo Street
Demo Lane
Demo City
DEO OMO

Warranty
12 months

Ticket KPI

Title*
Defect Response Time

Body
Can you advise what your defect response time would be for a broken tile?

Document upload is available after discussion creation.

External Discussers
Property Management Portal Demo
Discussers

Submit

Back Edit

Property Management Demo -
Property Management Portal Demo
Demo Street
Demo Lane
Demo City
DEO OMO

Warranty
12 months

Ticket KPI

Discussion Owner
Property Management Portal Demo
Created By: Property Manager
Created On: 11/10/2022 14:33
Regarding: Property Management Demo

Discussers
Property Manager
Property Management Portal Demo

Defect Response Time

Discussion Details
Can you advise what your defect response time would be for a broken tile?

Who is Involved in this discussion?
Comments Documents (0)

Documents

Document Name	Uploaded By	Uploaded	Actions
<p>Upload Files</p> <p>Image</p>			

Creating a Ticket

5 Steps to Creating a Ticket

1. Using the Search Bar in the top right hand of the screen, locate the address/ plot number
2. New Ticket (one defect per ticket)
3. Choose from the Defect Category and Subcategory and include a detailed description
4. Other Comments (i.e. Main entrance closed)
5. Review and add support documents (images)
6. Post Ticket – A member of the Principle Contractors Aftercare Team will pick up the ticket and process accordingly

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1AM - Sandbox Account

Activity Tickets Inspection Lists Calendar Discussions Schemes Reports

New Ticket

Scheme Defect Contact Review

Scheme and Plot

Choose Scheme: Property Management Demo

Choose Plot: 1-1 Demo Street, Demo Lane, Demo City, DEO OMO

Next Step

Priority and Defect

Priority: Low

Choose Defect Category: [Dropdown]

Sub-Category: [Dropdown]

Reference Num.: [Text Field]

Defect Description: [Text Area]

Prev Step Next Step

Supporting Documents

Add Document

Browse... No files selected.

Prev Step Post ticket and add new Post Ticket

Creating a Ticket: Top Tips

- ✓ Please provide a detailed description of the defect
- ✓ Set the Priority of the defect in line with the SLA's
- ✓ Add any additional information that will be useful for the person who will be attending the job (e.g. if the Resident works nights and prefers to be contacted after a certain time)
- ✓ Each ticket has its own unique number which is searchable using the Search bar




Comments

Now you have created your ticket, you have an open line of communication regarding your reported defect via the Comments Tab

Simply Add a Comment to:

- ✓ Liaise directly regarding appointments
- ✓ Request an update
- ✓ Inform any changes to the report defect (i.e. the problem has worsened)



Back Edit Close

Ticket Number

11502

Status

Open

Reference Num.

Ticket KPI Status

Priority : Low
Deadline : 21/12/2022 14:47
28 days left

Scheme

Property Management Demo

Plot 1

1 Demo Street, Demo Lane, Demo City,
DEO OMO
Warranty Status: active

Contact Details

Mrs Resident

0123456789

Additional Info:

Defect

Kitchens

Plinth

Plinth damaged in Kitchen

Comments (1) Details Costs(0) Documents (0) Tasks (0) Appointments (0)

Comments

1AM - Sandbox Account Recipients

Search recipients...

Add Comment

Property Manager

New Ticket Created
by Property Manager
On 11/11/2022 14:47

Ticket Status

There are 5 Status levels for Tickets:

1. Open – Your Ticket has been raised successfully and your Principle Contractor has been notified
2. In Progress – Your Principle Contractor is working to resolve the Defect
3. On Hold – Your Ticket has been placed on hold. This could be for a number of reasons, i.e. parts required/ no access
4. Closed – The ticket has been resolved
5. Aborted – The ticket has been aborted. This could be for a number of reasons, i.e. non-defect/ no access



Calendar and Appointments

Any appointments raised will be shown in your Calendar and the Appointments tab on the Ticket.

Appointments link to specific Tickets & Plots.

If the appointment is unsuitable, simply add a comment to the relevant Ticket proposing an alternative date/time.

The appointments are all in real-time



Back Edit Close

Ticket Number
11502

Status
Open

Reference Num.

Ticket KPI Status
Priority : Low
Deadline : 21/12/2022 14:47
27 days left

Scheme
Property Management Demo

Plot 1
1 Demo Street, Demo Lane, Demo City,

Defect
Kitchens
Plinth
Plinth damaged in Kitchen

Comments (1) Details Costs (0) Documents (0) Tasks (0) Appointments (1)

Title	For	Date
Investigate Plinth	Bob The Operative	From: Saturday, November 12, 2022 11:00 AM Duration: 2 hours SMS reminders: Enabled

Calendar

Appointments

Show 24hr times Hide Cancelled Appointments Today

Filter options

7 – 13 November 2022

Month View Day

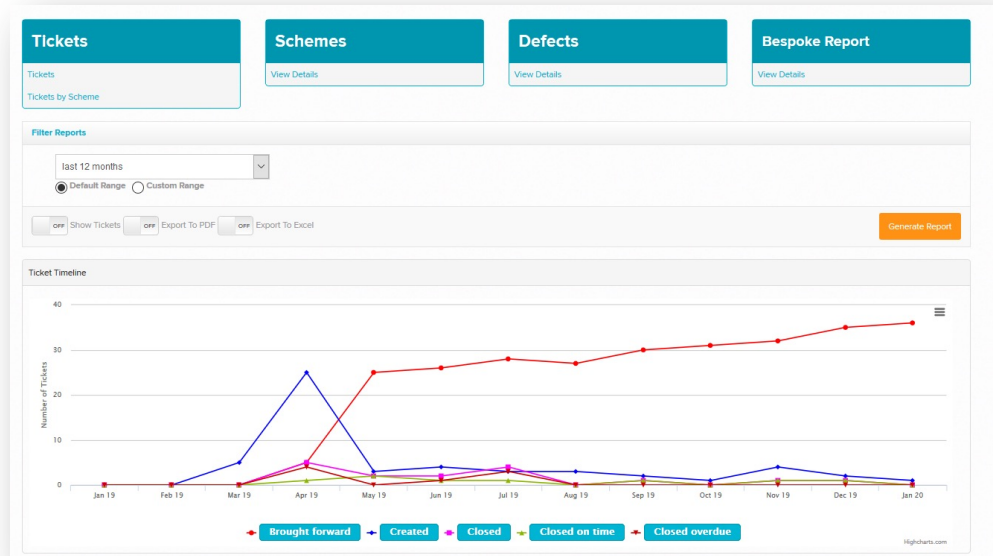
Monday 7	Tuesday 8	Wednesday 9	Thursday 10	Friday 11	Saturday 12	Sunday 13
					11:00 am - 1:00 pm Investigate Plinth Ticket: 11502 (Open) 1: 1 Demo Street, Demo Lane, Demo C... Bob The Operative	

Reporting

To create a Report, click on the Reports Tab.

From here you can choose which reports you require

- ✓ Ticket Report
- ✓ Scheme Report
- ✓ Defect Report
- ✓ Bespoke Report





Thank You

clixifix® Limited.

Unit S3 & S4, The Evolve Building, Cygnet Way, Rainton Bridge South Business Park, Houghton-le-Spring, Tyne and Wear, DH4 5QY.

0191 500 7924

Our office hours are
09:00-17:00 (UK)