# CIXIX

# Property Management Portal User Guide



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## What is clixifix®

clixifix® 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 clixifix® homepage, where you can also watch a short overview video.





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#### board & Overview

## 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

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**clixifix**<sup>®</sup>

## 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

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# 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

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- 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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# 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 ill 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

 $\checkmark$  Each ticket has its own unique number which is searchable using the Search bar

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#### 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

 $\checkmark$  Inform any changes to the report defect (i.e. the problem has worsened)

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Reference Num.	Comments (1) Details Costs(0) Documents (0) Tasks (0) Appointments (0)	
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DE0 0MO Warranty Status: active		+ Add Comment
Contact Details	Property Manager	11/11/2022 14:47
Mrs Resident     0123456789	New Ticket Created	
Additional Info:	by Property Manager	
	On 11/11/2022 14:47	

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### **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
- 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

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# Calendar and Appointments

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

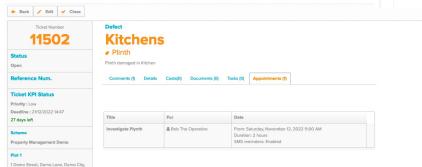
Appointments link to specific Tickets & Plots.

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



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Monday 7	Tuesday 8	Wednesday 9	Thursday 10	Friday 11	Saturday 12 © 11.00 am - 100 pm Investigate Plynth Ticket - 15502 (Oper) 1 - 10emo Street, Demo Lane, Demo C	Sunday 13

#### The appointments are all in real-time



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## Reporting

To create a Report, click on the Reports Tab.

From here you can choose which reports you require

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✓ Ticket Report

✓ Scheme Report

✓ Defect Report

✓ Bespoke Report

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#### **Clixifix® Property Management Portal**



#### Thank You

clixifix<sup>®</sup> Limited.

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