clixifix®

Step-by-Step User Guide
for the Commercial Client Portal

Contents

clixifix®

03 **Activity Feed**

The latest Activity and Comments appear when you sign into your clixifix® account, updating you on recent actions associated with your defects.

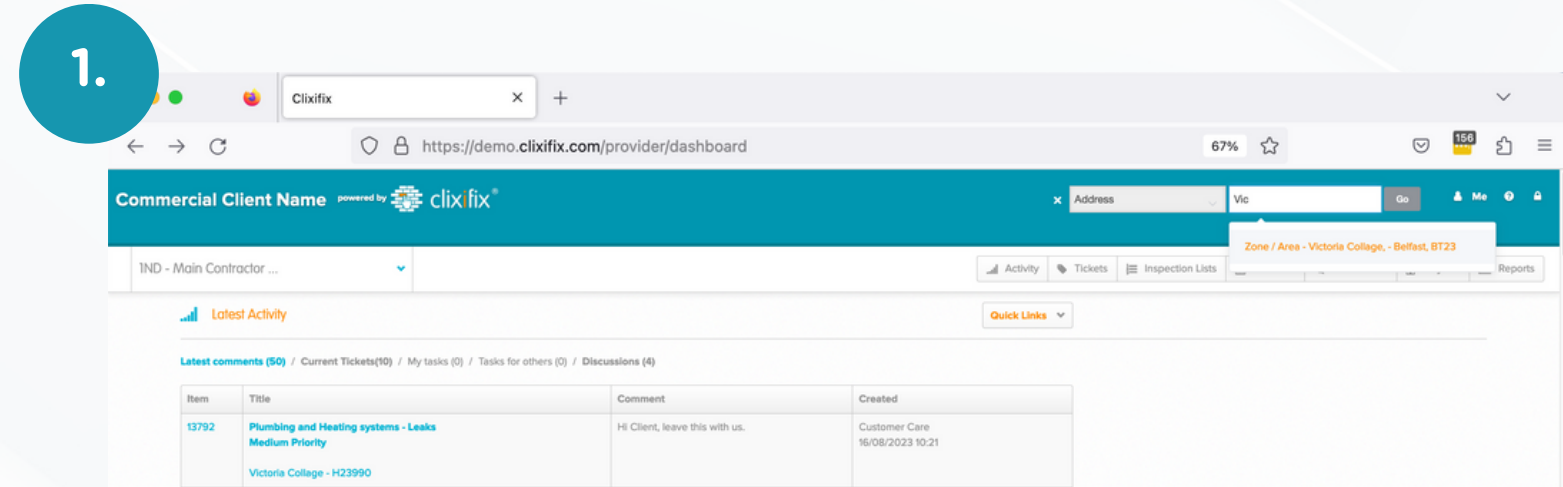You can always return to this screen by clicking the Activity button in the toolbar.

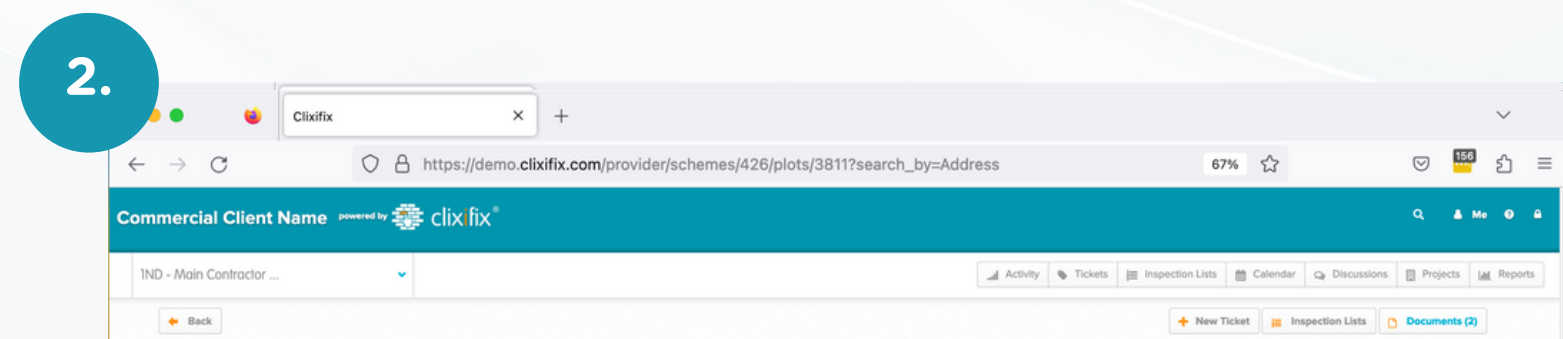All activities are listed in chronological order of oldest first
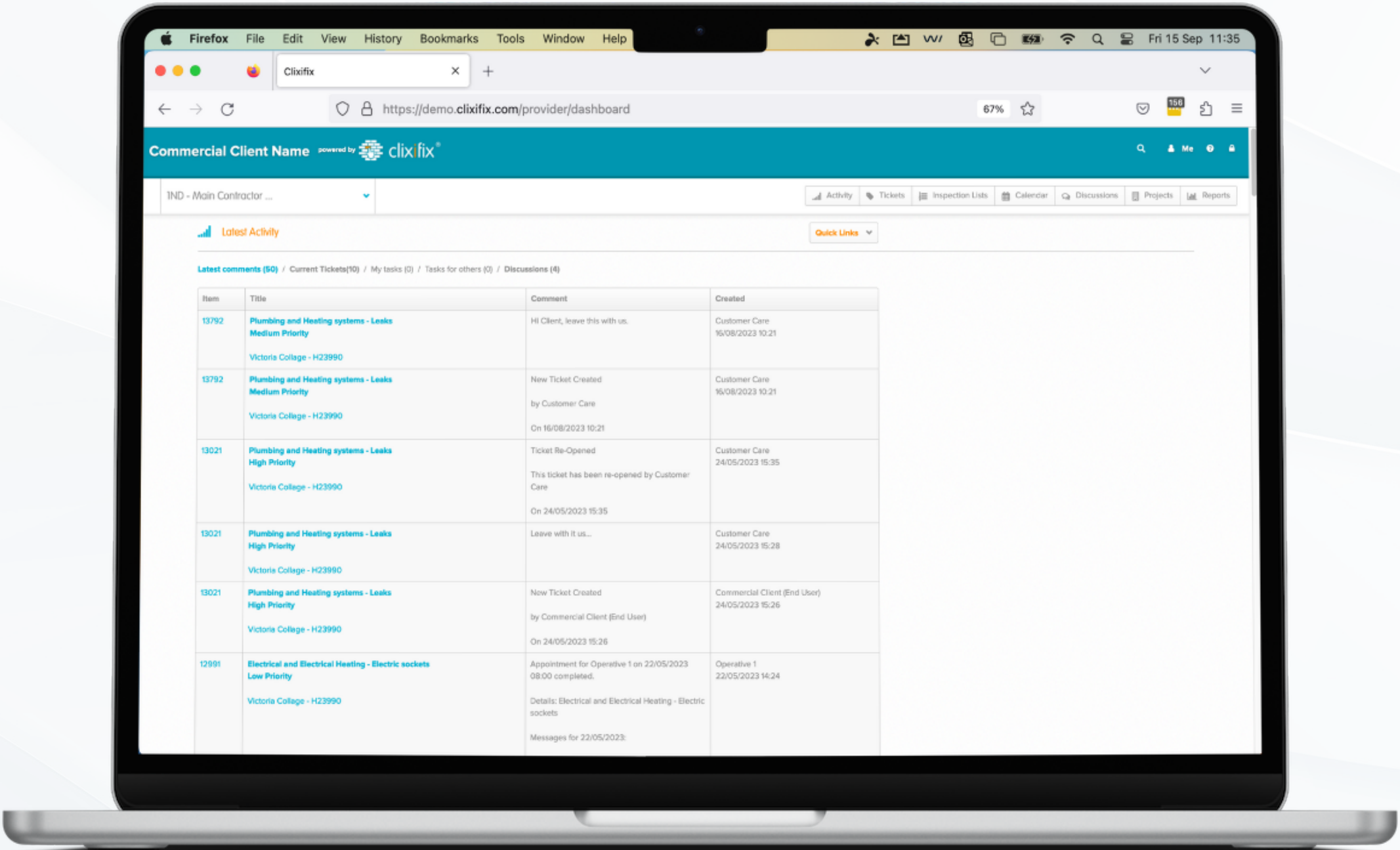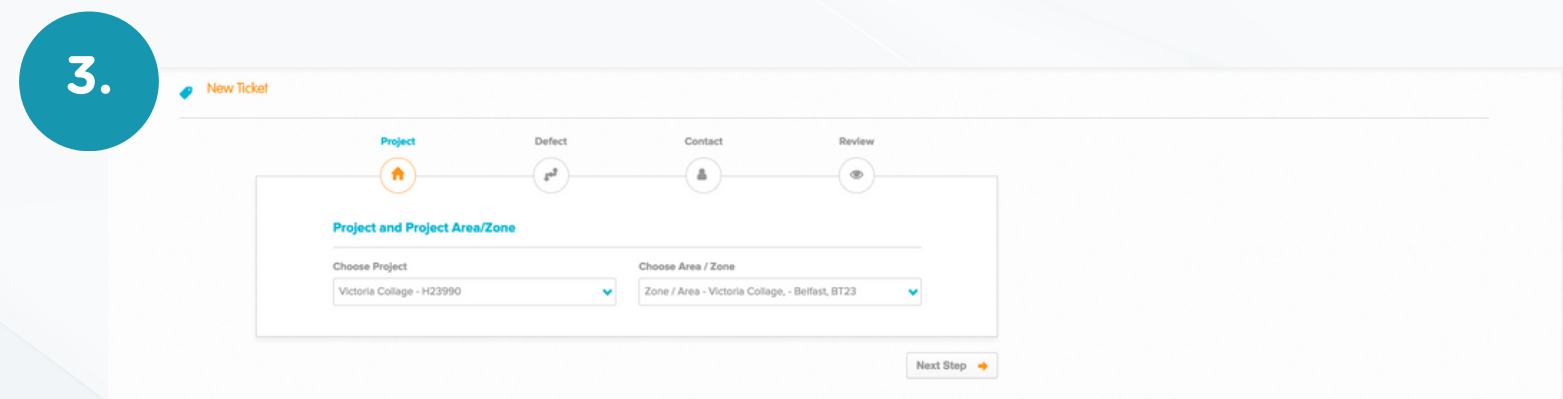
04 **6 Steps to reporting a defect**

Step 1. Click on the Search icon to open the search to find the relevant project area/zone.

Step 2. Once located click +New Ticket.

Step 3. Project and Area/Zone information will be prefilled in the ticket creation box. Check these are correct and click Next Step.

clixifix®

Step 4. Select the relevant defect category and subcategory, as well as any other comments you would like to add.

Step 5. Review and add supporting evidence such as an image or document.

Step 6. Post ticket - A member of the Principal Contractor aftercare team will pick up the Defect and process it accordingly.
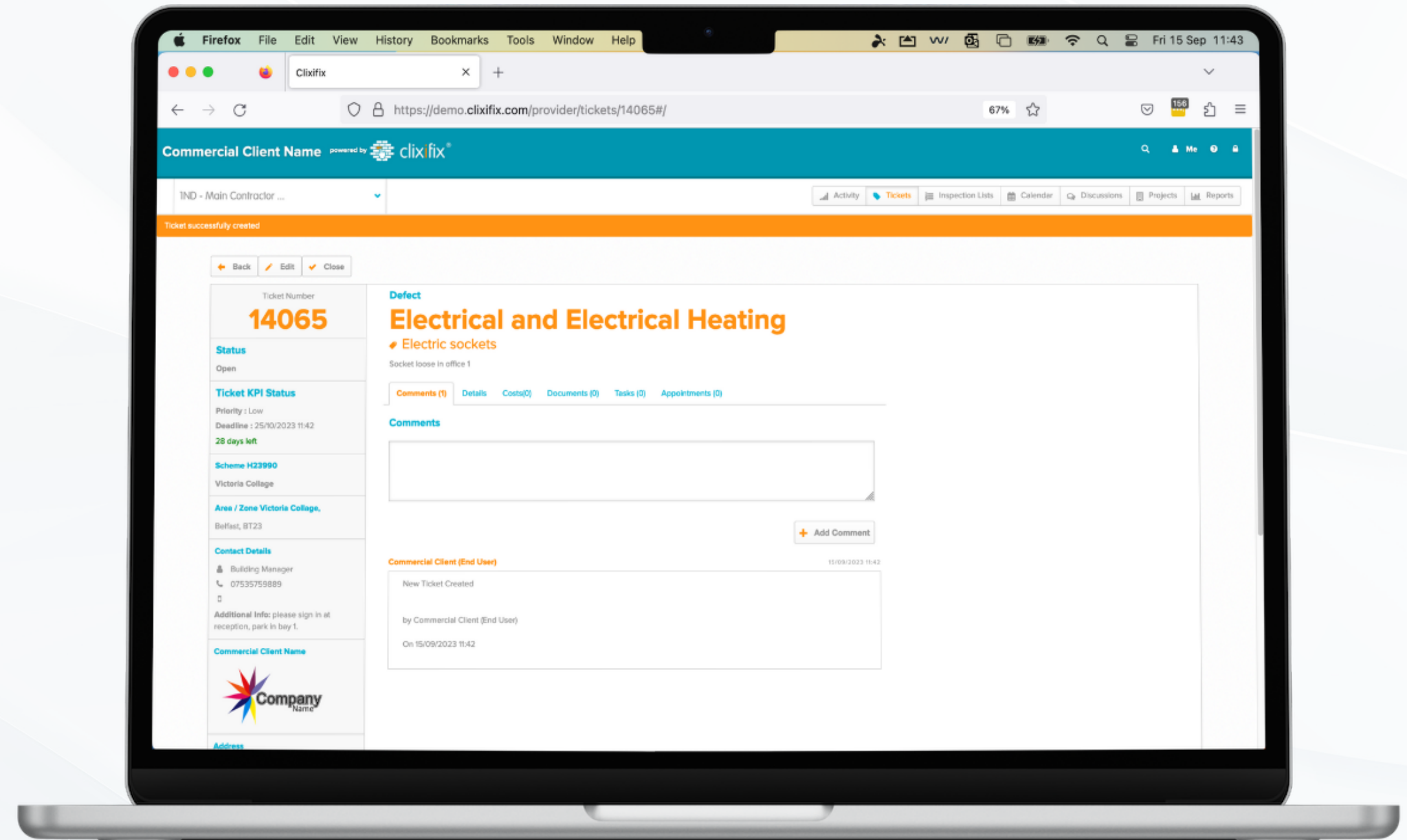
06 **Comments**

clixifix® allows an open line of communication with your Principal Contractor for your defects.

Comments can be added to a ticket by selecting +Add Comment to:

- Liaise with your Principal Contractor regarding appointments
- Request an update
- Inform your Principal Contractor of any updates to the reported defect you become aware of.

clixifix®

07 **Defect Status**

There are 4 possible Status levels for defects

Open - The defect has been raised successfully and your Principal Contractor has been notified.

In Progress - Your Principal Contractor is working to resolve the defect.

On Hold - The defect has been placed on hold.

Closed - The defect has been resolved and the ticket is now closed

Ticket Number

14065

Status
Open

Ticket KPI Status
Priority : Low
Deadline : 25/10/2023 11:42
28 days left

Scheme H23990
Victoria Collage

Area / Zone Victoria Collage,
Belfast, BT23

Contact Details
Building Manager
07535759889

Additional Info: please sign in at reception, park in bay 1.

**Commercial Client Name**

Company Name

Address

clixifix ®

08 **Creating an Inspection List**

Use the Search Bar to locate the Area/Zone of your project.

To create an inspection list, simply select +New Inspection List and follow the steps to create the list and add defects to it.

In the Defect Description box please be as descriptive as possible.

Once you have captured all of the defects, click Post Inspection List to send to your Principal Contractor.
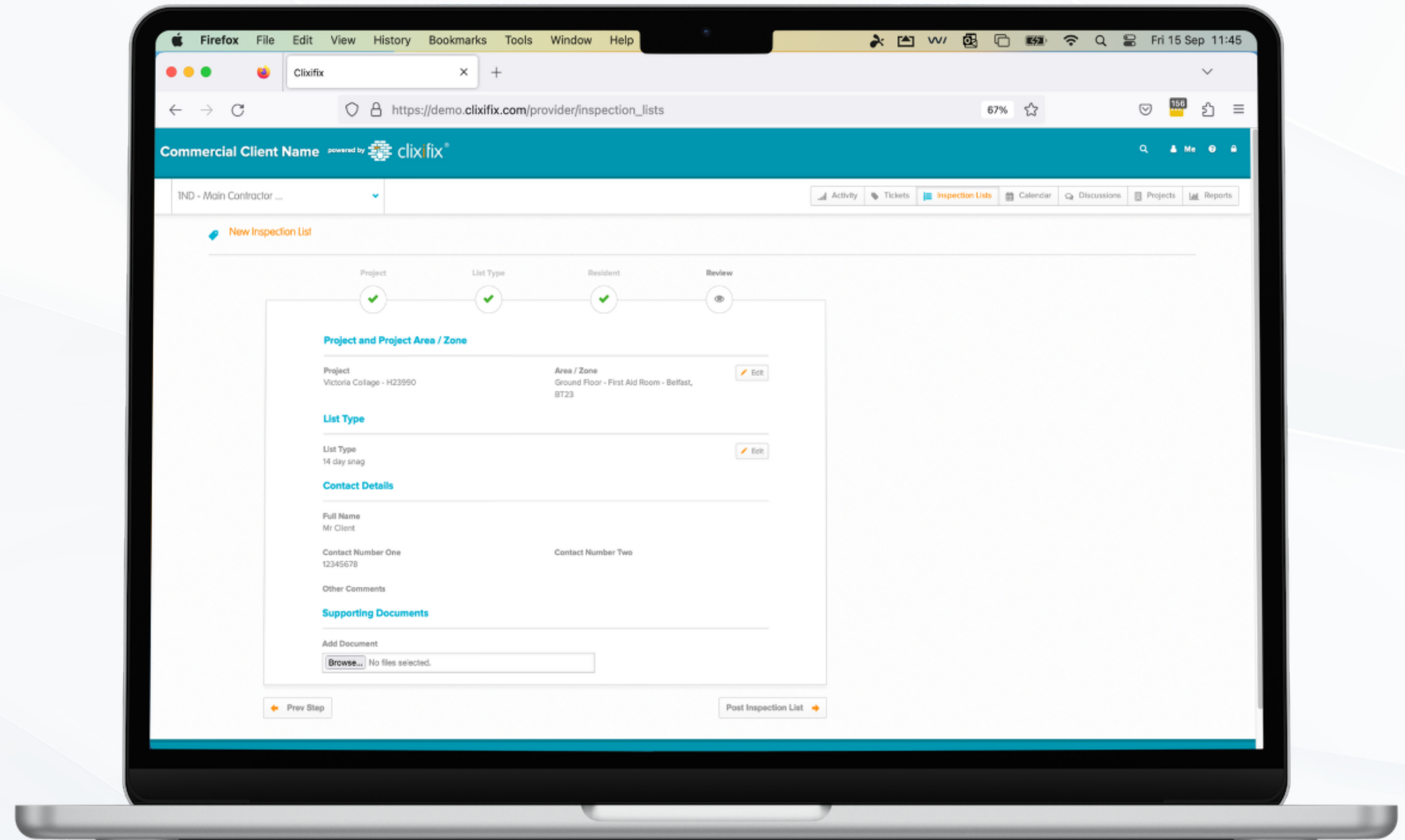
09 **Discussions**

The quickest and simplest way to contact your Principal Contractor would be to raise a Discussion.

Step 1. Add

- Title (e.g. Defect Response Time)
- Detail (e.g. Can you advise what your defect response time would be for a broken tile?)
- File (if applicable)

Step 2. Submit

Any response from your Principal Contractor will sit under your original query. You will also be notified via email.
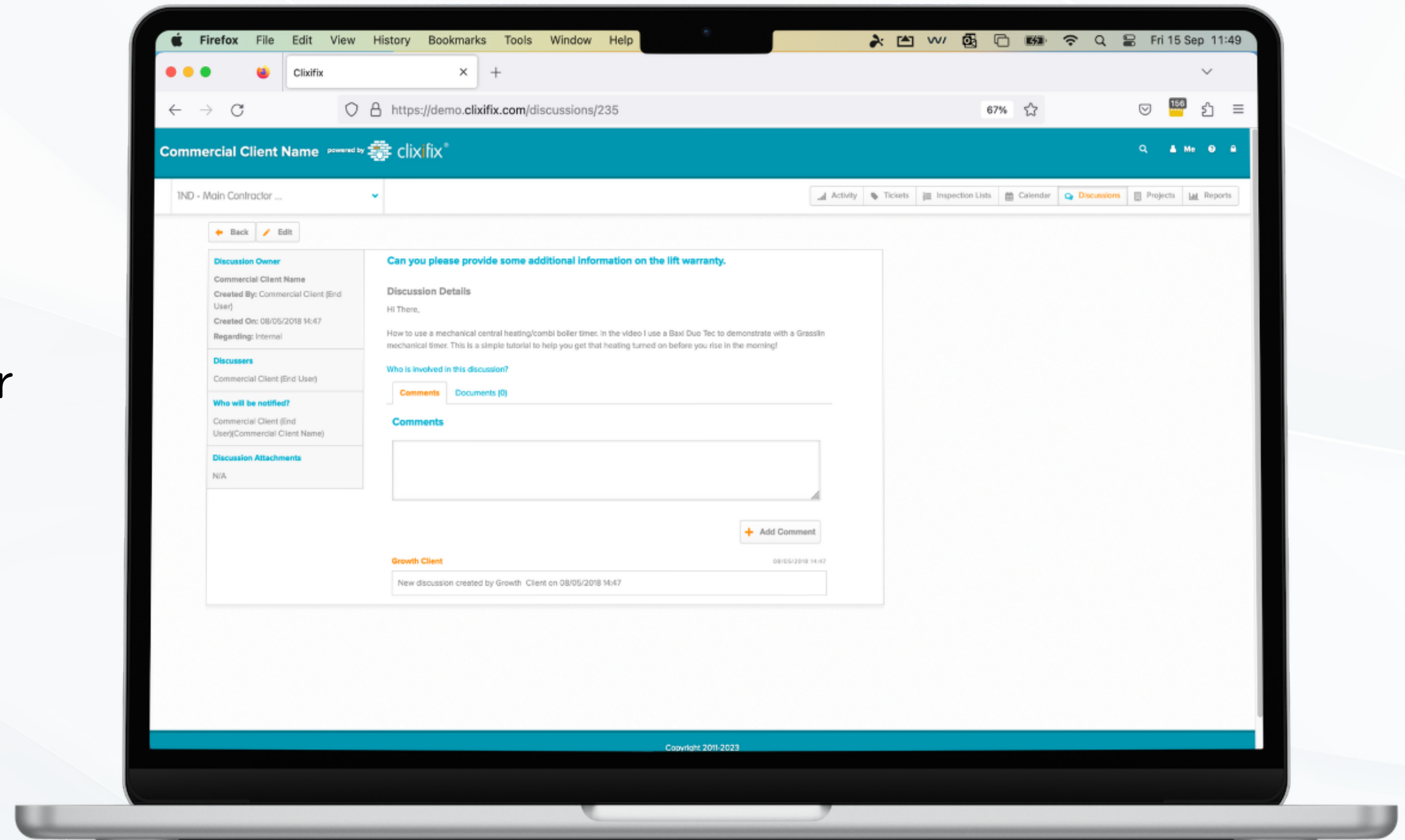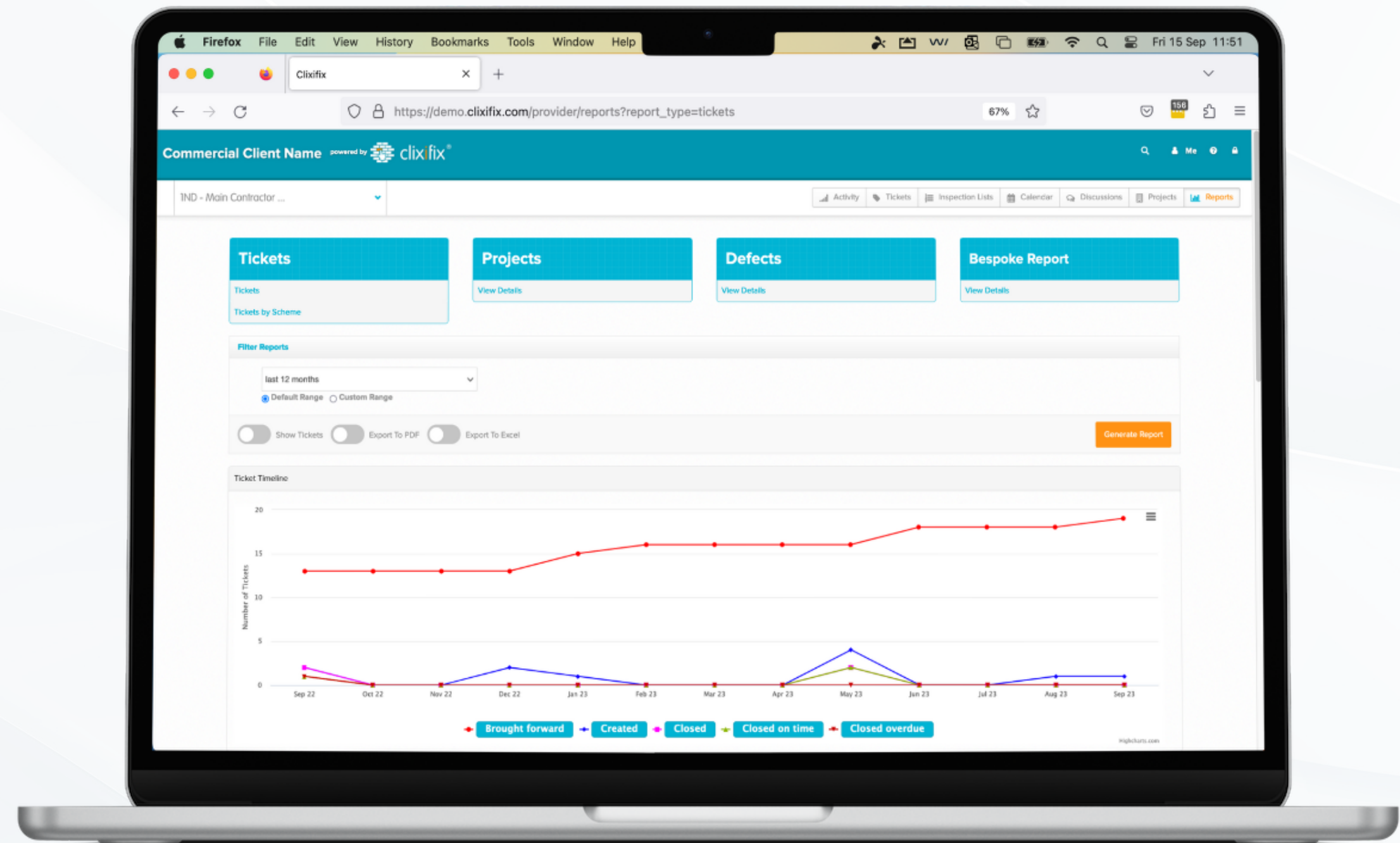

clixifix®

10 **Reports**

If access is granted to reports by your Principal Contractor you can utilise the Reporting tools in clixifix®

Select the Reports Tab and choose a report to view or download

- ✅ Ticket Report
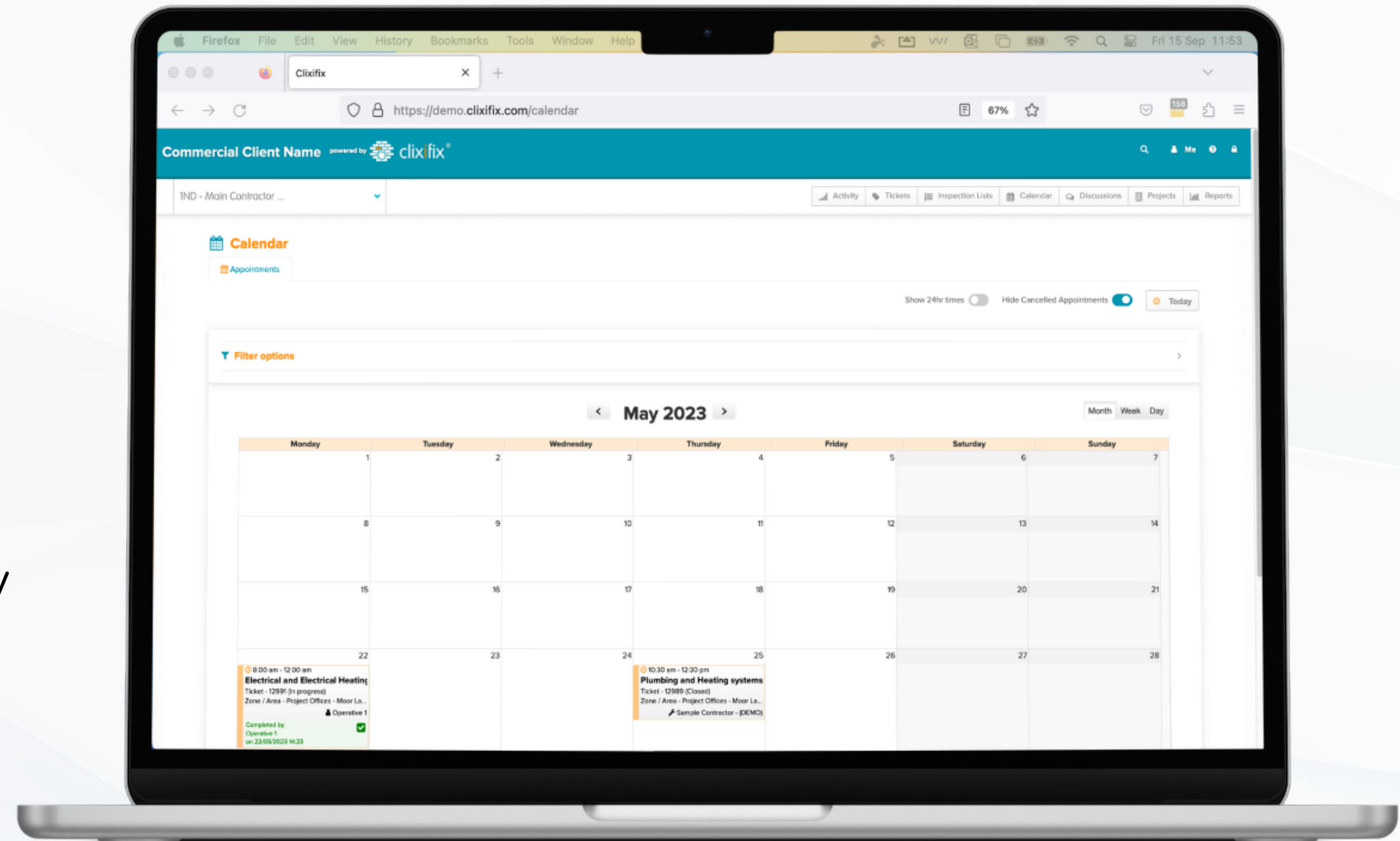- ✅ Project Report
- ✅ Defect Report
- ✅ Bespoke Report

clixifix®

11 Calendar and Appointments

Any appointments created by your Principal Contractor in clixifix® will be shown in your Calendar.

Appointments link to a specific Defect.

If the Appointment is unsuitable, simply add a comment to the relevant Defect proposing an alternative date/time.
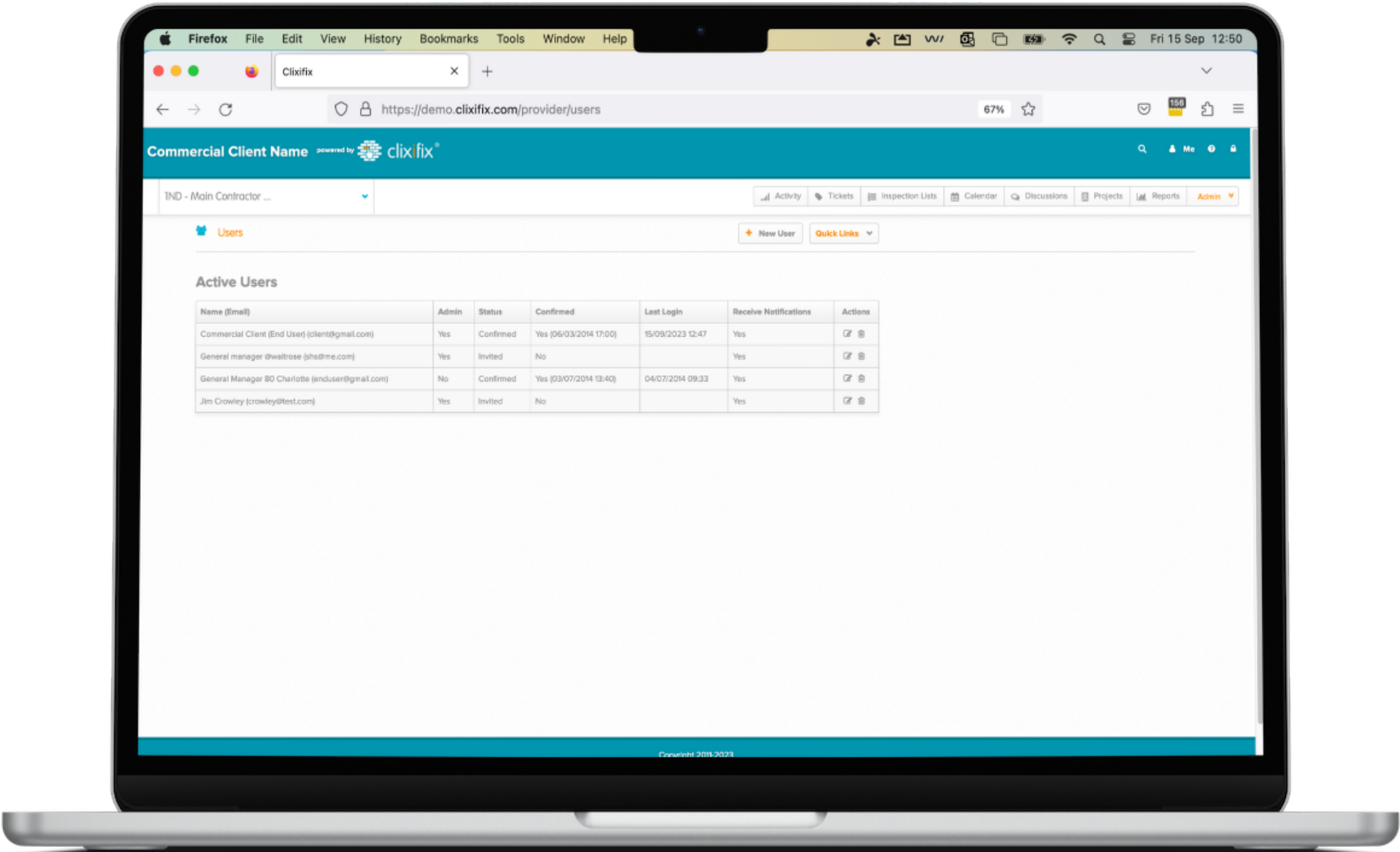
12 **Managing Users**

Administrators are able to add additional users by selecting the User tab from the tool bar.

Additional users are free to add, and there is no limit on how many you wish to invite.

Once a user is invited they will be notified via email with a link to set up their clixifix® password.

12 Benefits of using the Commercial Client Portal

✓ Greater visibility of defects position across a project

✓ Real-time collaboration

✓ Recorded proof of resolution on all resolved defects

✓ Reduces requests for updates from internal teams

✓ Accurate diagnosis of defect data

clixifix®

clixifix®

For assistance with using your portal you can contact the clixifix® Success Team below

Support