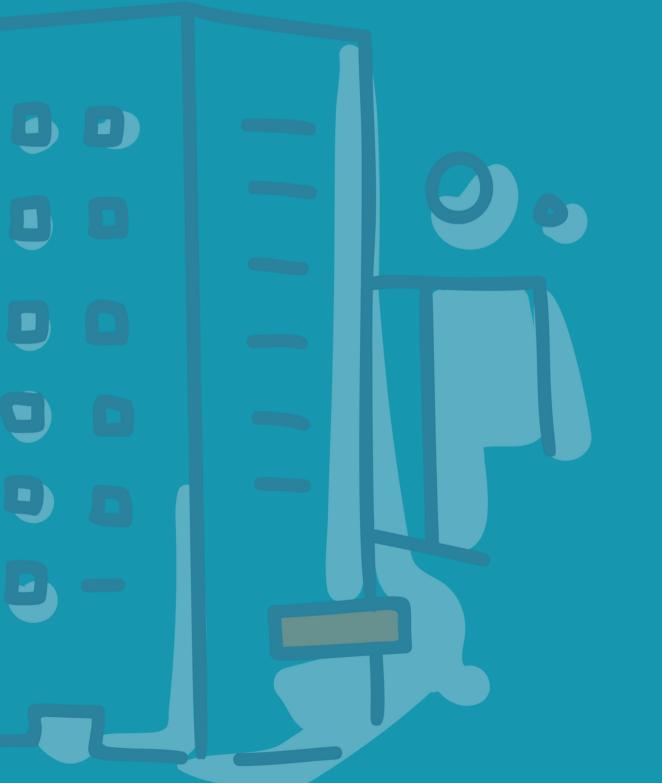
# Cixfix®





# Contents

- 03. Activity Feed
- 04. 6 Steps to reporting a defect
- 05. 6 Steps to reporting a defect continued
- 06. Comments
- 07. Defect Status
- 08. Creating an Inspection List
- 09. Discussions
- 10. Reports
- 11. Calendar & Appointments
- 12. Managing Users
- 13. Benefits of using the Commercial Client Portal

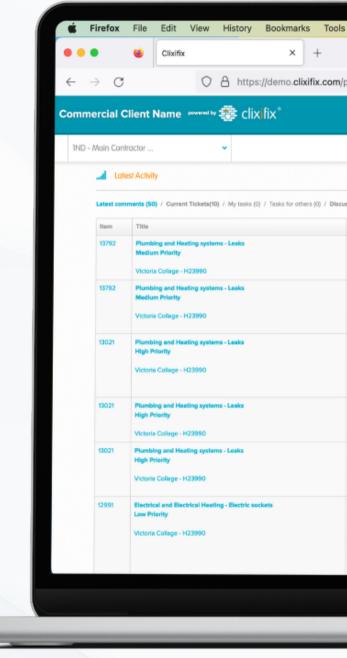


# **03 Activity Feed**

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



provider/dashboard 67% 🟠 🕑 🔛 🖞 = Q A Me O A Activity V Tickets 🗮 Inspection Lists 🏦 Calendar Q Discussions 🔲 Projects 🕍 Reports Quick Links V																
provider/dashboard 37% 12 C I C I C I C I C I C I C I C I C I C	ols	Window Help			2	<b>≛</b> ] ∨∨/	/ 63	G	<b>15/2</b> )	(;	Q		Fri 15	Sep	11:	35
Diricultarily (additional							8					_				
Image: Arritery	n/p	provider/dashboard						67%	☆			⊽	15	8	£	=
Contract Links       Contract       Contrand       Contract    <												Q		Me	0	
Contract Links       Contract       Contrand       Contract    <																
estors (4) Consent         Conset           H Chert, leave this with us.         Guistomer Care SubDID2023 10.21           New Takker Created by Customer Care Child/021202 10.21         Guistomer Care SubDID2023 10.21           Tiskat Re-Opened This takket has been re-opened by Customer Care On 240/05/2023 15:35         Guistomer Care 240/57/2023 15:35           Leave with it us         Guistomer Care 240/57/2023 15:26           New Takket Created by Commercial Chert find Usen Con 240/57/2023 15:26         Guistomer Care 240/57/2023 15:26           New Takket Created by Commercial Chert find Usen Con 240/57/2023 15:26         Guistomer Care 240/57/2023 15:26           Appointment for OpenedPart on 220/57/2023         Guestate 1           On 240/57/2023 15:26         Guestate 1           On 240/57/2023 15:27         Guestate 1           On 240/57/2023 15:28         Guestate 1				all Activity	Ticket	its 🗎 In	spection L	sts 📋	Calenciar	Q Di	scussions	U P	rojects	Let.	Report	s
CommantControl endH Clerrt, leave this with us.Customer Care Su082223 30:21New Ticket Created by Customer Care Customer Care 				Quick Links	~											
H CReet, kevere this with us.Customer Care sw08/2023 30.21New Ticket Created by Customer Care to 16/08/2023 10.21Customer Care 	scu	issions (4)														
NevBi2022 10.21Nev Ticket Created by Customer Care Created Ch 1000/2023 10.21Ticket Re-Opened Ticket Re-Opened by Customer Care CareAubSc2023 15.25Lasse with it usQuatomer Care Care Con 24/05/2023 15.25Nov Ticket Created Supporting Care AubSc2023 15.25Nov Ticket Created Supporting Care AubSc2023 15.25Nov Ticket Created Supporting Care AubSc2023 15.25Nov Ticket Created Supporting Care AubSc2023 15.25AubSc2023 15.25Data Ticket Care Supporting Care CareAubSc2023 15.25Care with it usCare with it us		Comment	Created													
by Customer CareSNOB2023 30.21by Customer CareCustomer Caretriket Re-OpenedCustomer CareTriket Kle-OpenedCustomer Caretriket Kles has been re-opened by CustomerCustomer CarecoreCustomer Caretriket Kles LosatedCustomer Careto 24/05/2023 15:26Customer CareAnoreacial Client (End User)Customer Careto 24/05/2023 15:26Customer Careto 24/05/2023 15:27Customer Careto 24/05/2023 15:28Customer Careto 24/05/2023 15:		HI Cilent, leave this with us.														
This ticket has been re-opened by Customer Care24/05/2023 15:35Leave with it usCustomer Care 24/05/2023 15:28Leave with it usCustomer Care 24/05/2023 15:28New Ticket Created by Commercial Client (End User) 24/05/2023 15:26Commercial Client (End User) 24/05/2023 15:26Appointment for Openative 1 on 22/05/2023Operative 1 22/05/2023 14:24Details: Electrical and Electrical Heating - ElectricOperative 1 22/05/2023 14:24		by Customer Care														
Leave with it usCustomer Care 24/05/2023 15:28New Ticket Created by Commercial Client [End User)Commercial Client (End User) 24/05/2023 15:26On 24/05/2023 15:26Commercial Client (End User) 24/05/2023 15:26Appointment for Operative 1 on 22/05/2023Operative 1 22/05/2023 14:24Carlis: Bectrical and Electrical Heating - ElectricCommercial Client (End User) 24/05/2023 15:26		This ticket has been re-opened by Customer Care														
by Commercial Client (End User)     24/05/2023 15:26       On 24/05/2023 15:26     2       Appointment for Operative 1 on 22/05/2023     Operative 1 22/05/2023 14:24       Details: Electrical and Electrical Heating - Electric sockets     Sockets																
08.00 completed. 22/05/2023 14:24 Details: Electrical and Electrical Heating - Electric sockets		by Commercial Client (End User)		User)												
sockets		08:00 completed.	22/05/2023 14:24													
		sockets														
		messages for 22/05/2023:														
				7												

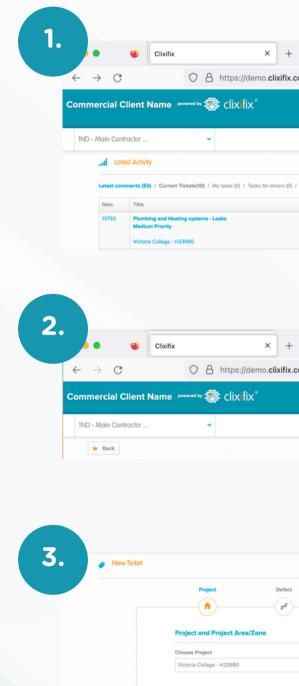


# 04 6 Steps to reporting a defect

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.



										$\sim$	
.com/	provider/dashboard				6	7% 公		$\bigtriangledown$	156	பி	=
				× Address		Vic		Go	& Mo		
						_					
			al Activity	Tickets	E Inspection Lists		- Victoria Collage		23	Reports	ו
			Quick Links	*							
/ Discu	issions (4)										
	Comment	Created									
	HI Client, leave this with us.	Customer Care 16/08/2023 10:21									
										~	
.com/	provider/schemes/426/plots/381	11?search_by=Add	lress		6	7% 公		$\bigtriangledown$	156	பி	≡
								۹	A Mo	•	.
			_al Activity	Tickets	Inspection Lists	Calendar	Q Discussion	is 🛄 Proje	ects Lad	Reports	
					+ New	Ticket 🔚 In	spection Lists	Docume	ents (2)		
	Contact	Review									
		•									
	Choose Area / Zone										
•		т23 🗸									
		Next Step	•								

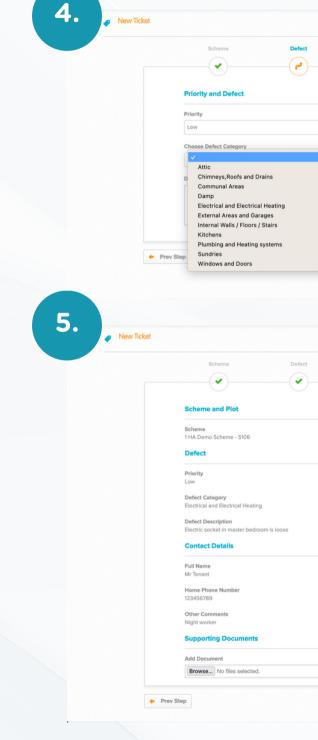


# 05 6 Steps to reporting a defect

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.



Contact Review		
<b>~</b>		
Sub-Category		
<b>v</b>		
li.		
Next Step 🔶		
Contact Review		
Contact Review		
Piot Edt		
Piot Edit		
Plot 1 - 1 HA Street, HA Lane, HA1 S106 Edit Sub-Category		
Plot 1- 1HA Street, HA Lane, HA1 S106 Edit Edit		
Plot 1 - 1 HA Street, HA Lane, HA1 S106 Edit Sub-Category		
Plot 1 - 1 HA Street, HA Lane, HA1 S106 Edit Sub-Category		
Plot 1 - 1 HA Street, HA Lane, HA1 S106 Edit Sub-Category		
Piot 1 - 1 HA Street, HA Lane, HA1 S106 Edit Sub-Category Electric sockets		
Plot 1 - 1 HA Street, HA Lane, HA1 S106 Edit Sub-Category		
Piot 1 - 1 HA Street, HA Lane, HA1 S106 Edit Sub-Category Electric sockets		
Piot 1 - 1 HA Street, HA Lane, HA1 S106 Edit Sub-Category Electric sockets		
Piot 1- 1HA Street, HA Lane, HA1 5106 Edit Sub-Category Electric sockets		
Piot 1- 1HA Street, HA Lane, HA1 5106 Edit Sub-Category Electric sockets		
Plot 1- 1HA Street, HA Lane, HA1SIO6 Edit Sub-Category Electric sockets		

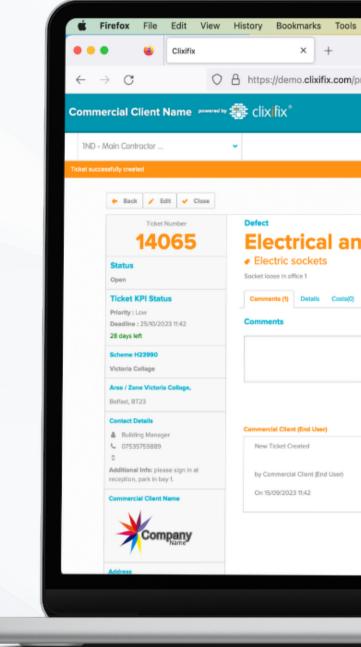


# 06 Comments

clixifix<sup>®</sup> 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.



/provider/tickets/14065#/ @ ♪ M @ ♪ = @ ♪ M @ ♪ = @ ♪ M @ ♪ @ ♪ M @ ♪												
/provider/tickets/14065#/ 67% ☆ © E 2 = Q ▲ M ● 0 ▲ Athily Texet is Inspection Lists © Calendar Q Decessions    Projects int Reports Athily Texet is Inspection Lists © Calendar Q Decessions    Projects int Reports Decensents (0) Tasks (0) Appeltments (0) + Add Comment	ls Window Help		2 1	W/	<b>6</b> C		((.	Q	🔒 Fri	15 Sep	11:43	
Activity Trivets in Impection Lists in Colondar in Discussions in Projects in Reports												
Activity Trivets in Impection Lists in Colondar in Discussions in Projects in Reports	n/provider/tickets/14065#/				67%	ŵ			⊌	156	മ≣	
Image: Activity     Trevets     Image: Calendar     Projects        Projects        Projects					-							
nd Electrical Heating									4	▲ Me	•••	
V Documents (0) Tesks (0) Appointments (0) Add Comment		al Activity	Tickets	j≣ Insp	ection Lists	Calendar	Q Disc	cussions	Projec	cts Lat	Reports	
V Documents (0) Tesks (0) Appointments (0) Add Comment												
V Documents (0) Tesks (0) Appointments (0) Add Comment												
V Documents (0) Tesks (0) Appointments (0) Add Comment												
+ Add Comment	nd Electrical Heating											
+ Add Comment												
	0) Documents (0) Tasks (0) Appointments (0)											
			di.									
		+ Add Commen	t									
		15/09/2023 1	11:42									
		_										



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

### Step-by-Step User Guide

for the Commercial Client Portal

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**



Address



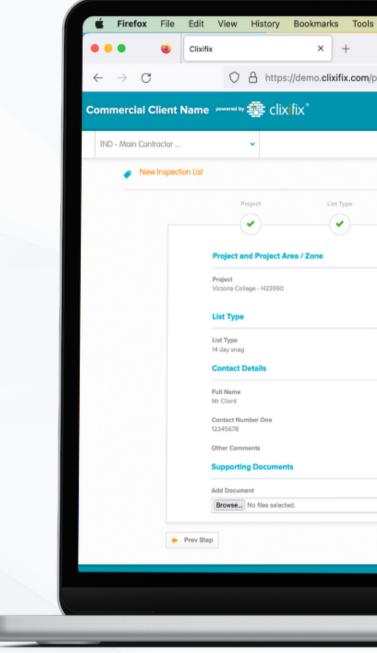
# **08 Creating an Inspection List**

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.



																_		
s	Window	Help						* 🖆	w/	ø	6	<b>252</b> )	((+	Q ;	E F	ri 15 Se	p 11:	45
																	~	
pro	ovider/insp	ection_list	ts							1	67%	☆			$\bigtriangledown$	156	പ്	≡
															٩	👗 Me	ø	•
						Acti	hity 4	Tickets	is insp	ection List	• •	Calendar	Q Di	iscussions	D Pro	jects in	Report	8
	Res	lident		beview														
		•		•														
		r - First Ald Roor	n - Belfast,	/ Ed	R													
	BT23																	
				/ Ed	it.													
	Contact Num	nber Two																
				Post Insp	pection List	+												
				_	_	2	_	_	_	_	_		_	_	_		_	_



# 09 **Discussions**

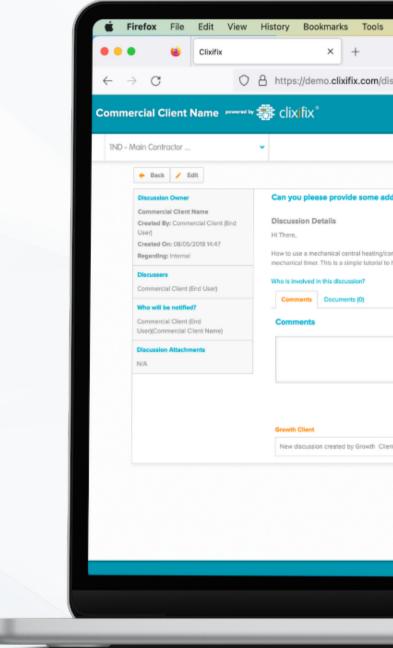
The quickest and simplest way to contact your Principal Contractor would be to raise a Discussion.

## 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.



										_	
s Window Help		2 F	1 w/	Øg (	C 159	((.	9	E Fr	ri 15 Sei	p 11:4	9
			-					_		~	
/discussions/235				67	% 公			$\bigtriangledown$	158	රිම	≡
								۹	🛓 Me	•	
	al Activity	Tickets	j≣ Insp	pection Lists	Calenda	r 🗛 D	liscussions	Proj	jects Lat	Reports	
additional information on the lift warranty.											
g/combi bailer timer. In the video I use a Baxi Duo Tec to demonstrate with a Gr al to help you get that heating turned on before you rise in the morning!	essiin										
	_lli										
+ Add Comm	nt										
08/05/201	194547										
Client on 08/05/2018 14:47											
Copyright 2011-2023											
	2										

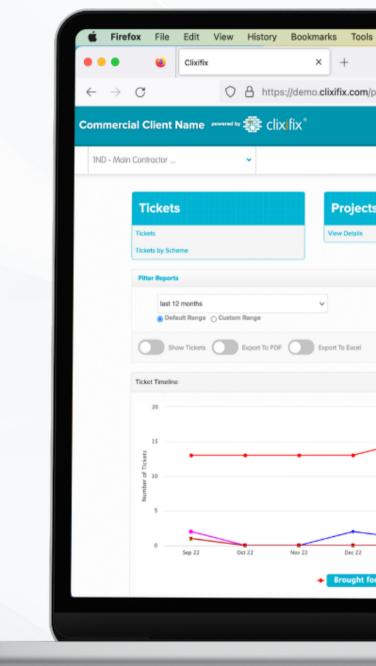


# 10 Reports

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

- V Ticket Report
- Project Report
- Oefect Report
- Bespoke Report



Window Help		🛯 ଚେର୍ଚ୍ଚ	Fri 15 Sep 11:51
			~
an idealan asta?an ast tura a tickata	670/	~	യ 📱 മ് ≡
rovider/reports?report_type=tickets	67%	☆	ତ <mark>କ</mark> ଥ =
			Q 👗 Me 🛛 🛱
	🛃 Activity 🔖 Tickets 🔠 Inspection Lists 🍵	t Calendar 🔾 Discussions	Projects In Reports
			6d
Defects	Besno	ke Report	
View Details	View Details		
View Melais			
		Genera	te Report
			=
		•	
	$\land$		
Jan 23 Feb 23 Mar 23 Apr 23	May 23 Jun 23 jul 23	Aug 23 Sep 2	23
	Closed overdue		
ward + Created • Closed • Closed on time	+ Closed overdue	Ng/K	icharts.com
	,		

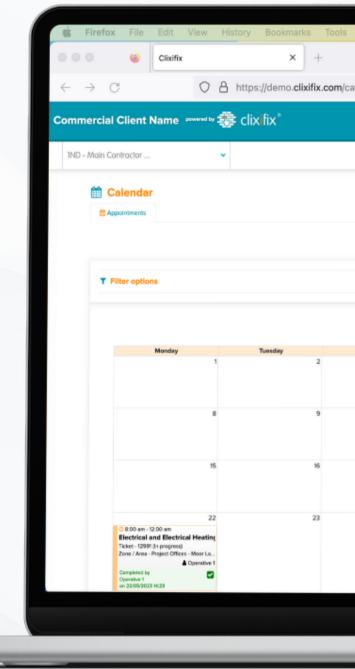


# 11 Calendar and Appointments

Any appointments created by your Principal Contractor in clixifix<sup>®</sup> 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.



Window Help	0	2	🔺 🗤 🛃		Q 🔐 Fri	15 Sep 11:53
						~
alendar			Ŧ	67% 🖒	$\bigtriangledown$	ഈ ഇ ≡
					٩	& Me € ₽
		_d Activity	Tickets 🗮 Inspection L	sts 🛗 Calendar 🔾	Discussions Projec	ts Lat Reports
			Show 24hr times 🔘	Hide Cancelled Appo	intments 💽 💿	Today
						,
						<u></u>
< N	lay 2023 🔌				Month Week Day	
Wednesday	Thursday	Friday	Saturda	y	Sunday	
3	4		5	6	7	
10	1		12	13	14	
17	18		19	20	21	
24			26	27	28	
	© 10:30 am - 12:30 pm Plumbing and Heating systems Ticket - 12989 (Closed)					
	Zone / Area - Project Offices - Moor La F Sample Contractor - (DEMO)					
4		7				

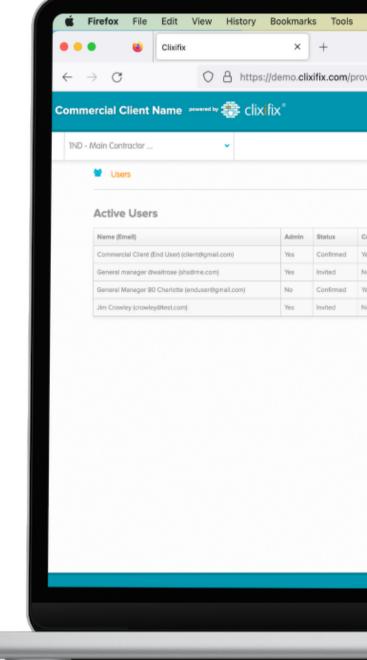


# 12 Managing Users

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<sup>®</sup> password.



Confirmed       Last Login       Receive Notifications       Actions         Yes       Col 1 (2)         Yes       Col 2 (2)	ider/users       67%       C       C       E       C       E       C       E       C       E       C       E       C       E       C       E       C       E       C       E       C       E       C       E       C       E       C       E       C       E       C       E       C       E       C       E       C       C       E       C <t< th=""><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></t<>																
ovider/users       67%       C <thc< th="">       C       C       <thc< th=""> <t< td=""><td>Addr/users 074 Gr II Control C</td><td>Window H</td><td>lelp</td><td></td><td></td><td>2</td><td>k 🖻</td><td>W/</td><td>Ø3</td><td>G</td><td><b>E/2</b></td><td>((.</td><td>Q</td><td>00</td><td>Fri 15 S</td><td>iep 1:</td><td>2:50</td></t<></thc<></thc<>	Addr/users 074 Gr II Control C	Window H	lelp			2	k 🖻	W/	Ø3	G	<b>E/2</b>	((.	Q	00	Fri 15 S	iep 1:	2:50
ovider/users       67% C       C									-	_				_			
Confirmed       Lest Login       Receive Notifications       Actions         Yes       Cal Report       Yes         Yes       Cal Report       Cal Report         Yes       Cal Report       Cal Report																Ý	
Image: Confirmed       Last Login       Receive Notifications       Actions         Yes (06/03/2014 13:00)       04/07/2014 09:33       Yes       Image: Confirmed       <	Interved       Leat Login       Receive Notifications       Actions         anfirmed       Leat Login       Receive Notifications       Actions         a (2007/2014 13.400)       04007/2014 09.33       Yes       If the section of th	ovider/users								67%	\$			$\overline{\mathbf{v}}$	156	பி	$\equiv$
Image: Confirmed       Lest Login       Receive Notifications       Actions         Yes (06/03/2014 13:40)       04/07/2014 09:33       Yes       Ifficial	Interned   Lot Login   Receive Netifications   Actions																
Actions       Actions         Yes (06/03/2014 17:00)       15/09/2023 12:47       Yes       If	Annu Uber       Outkt Likis         snfirmad       Last Login       Receive Notifications       Actions         sk (96/93/2014 17:00)       50/93/2023 12:47       Yes       Image: Comparison of the state of the													۹	. <b>≜</b> M	e 0	•
Actions       Actions         Yes (06/03/2014 17:00)       15/09/2023 12:47       Yes       If	Annu Uber       Outkt Likis         snfirmad       Last Login       Receive Notifications       Actions         sk (96/93/2014 17:00)       50/93/2023 12:47       Yes       Image: Comparison of the state of the				d Arthuby B	Tichate In	. Inconstin	un 1 lete	en Calo	edar c	Discus	elone d	E Design	. 1.1	Departs		
Confirmed         Last Login         Receive Notifications         Actions           Yes (06/03/2014 17:00)         15/09/2023 12:47         Yes         GF @           No         Image: March	anfirmed Latilogia Receive Notifications Actions a (D6033/2014 17:00) 5503/2023 12:47 Ves C C a (03077204 13:40) 04/077204 09:33 Ves C C a (03077204 13:40) 14:57 Ves C C C a Ves C C C C C C C C C C C C C C C C C C C				Al Activity	rickets g	[ inspectio	on Lists	III Cale	noar s,	a Discusi	sions	E Project	s LM	wepons	Acmin	-
Yes (06/03/2014 17:00)         15/09/2023 12:47         Yes         Off           No         Yes         Off         Off           Yes (03/07/2014 13:40)         04/07/2014 09:33         Yes         Off	No         No         No         No           No         No         No         No         No				+ New User Qu	ick Links 👒											
Yes (06/03/2014 17:00)         15/09/2023 12:47         Yes         Off           No         Yes         Off         Off           Yes (03/07/2014 13:40)         04/07/2014 09:33         Yes         Off	No         No         No         No           No         No         No         No         No																
Yes (06/03/2014 17:00)         15/09/2023 12:47         Yes         Off           No         Yes         Off         Off           Yes (03/07/2014 13:40)         04/07/2014 09:33         Yes         Off	No         No         No         No           No         No         No         No         No																
Yes (06/03/2014 17:00)         15/09/2023 12:47         Yes         If it is           No         Yes         If is         If is           Yes (03/07/2014 13:40)         04/07/2014 09:33         Yes         If is	N (96032031 17.00)         N (902023 12.47)         N (9         IIII)         IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Confirmed		Last Login	Receive Notifications	Actions											
Yes (03/07/2014 13:40) 04/07/2014 09:33 Yes Gr		Yes (06/03/2014 17:0	0)		Yes	67 8											
		No			Yes	67 8											
No Yes OF D		Yes (03/07/2014 13:4	0)	04/07/2014 09:33	Yes	C2 8											
	Preventel 2011-2023	No			Yes	C7 8											
	Convertedai 2011-2023																
	Convictit 2013-2023										_						
				Convright 2011-2	023												
Conwicht 2011-2023																	
Cerwicht 2011-2023																	
Converbit 2013-2023		-															



# 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



CIXIX® For assistance with using your portal you can contact the clixifix<sup>®</sup> Success Team below <u>Support</u>

