



Step-by-Step User Guide for the Client Portal



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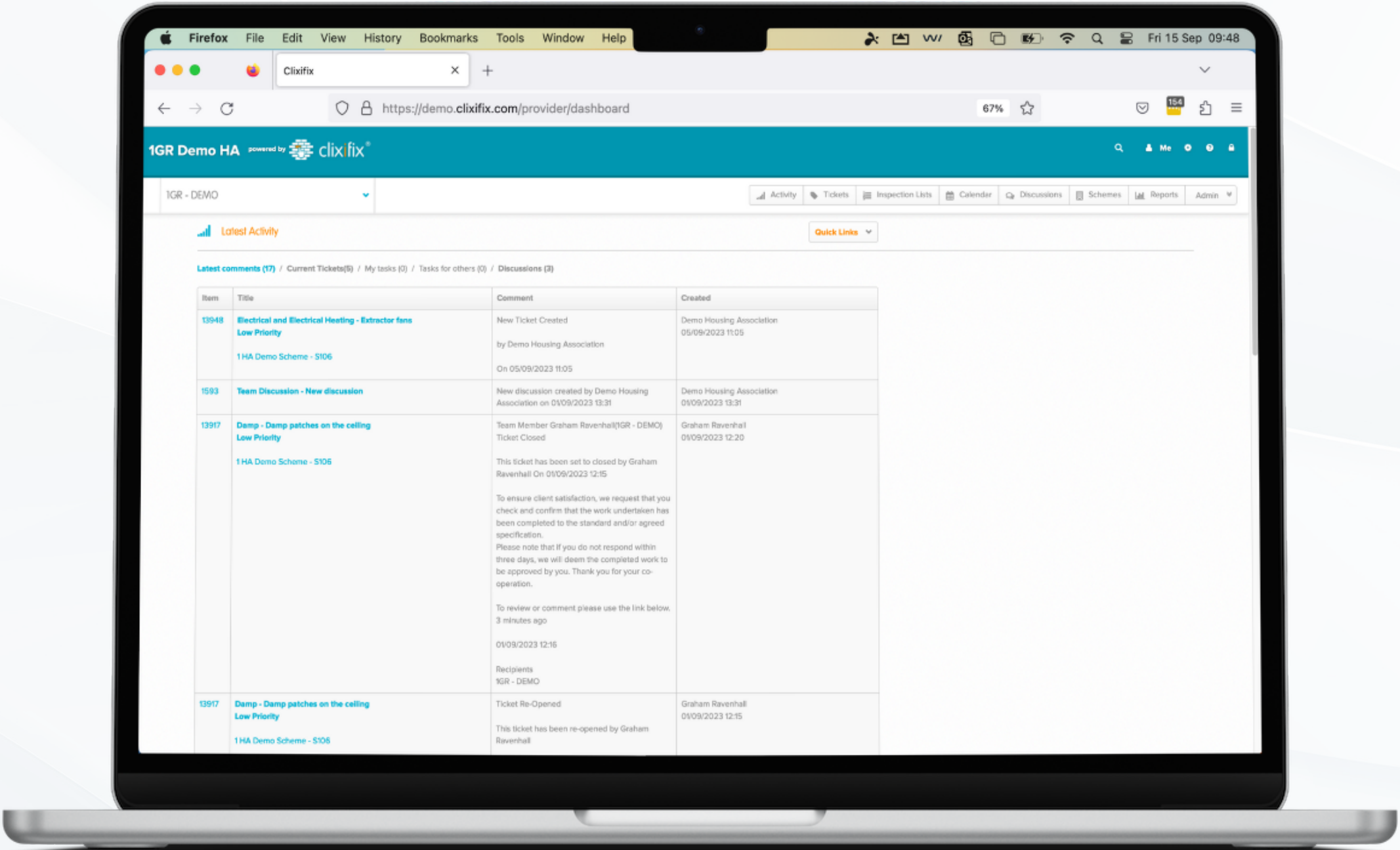
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03 Activity Feed

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



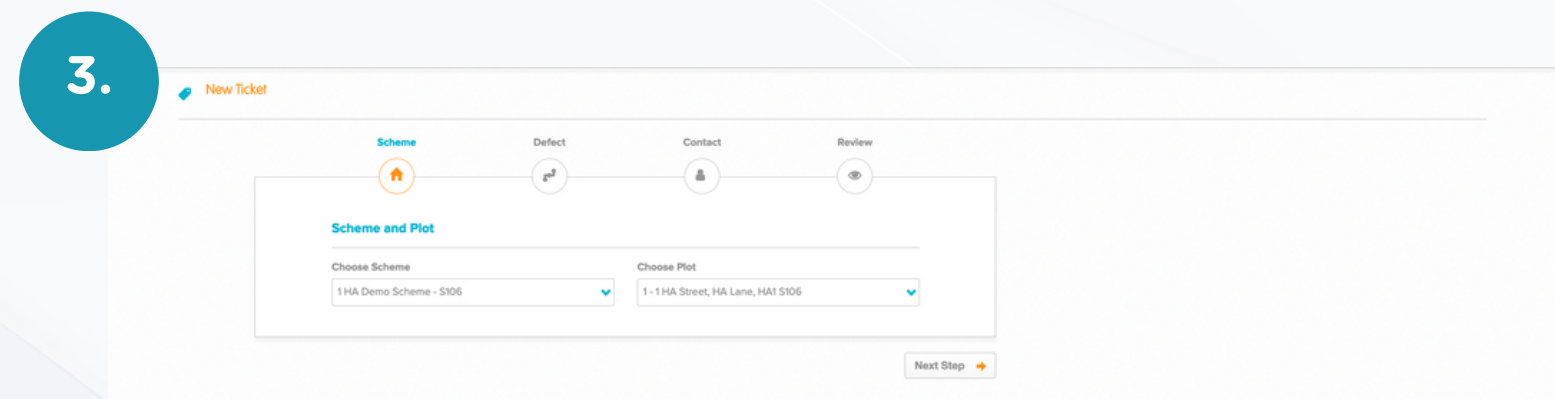
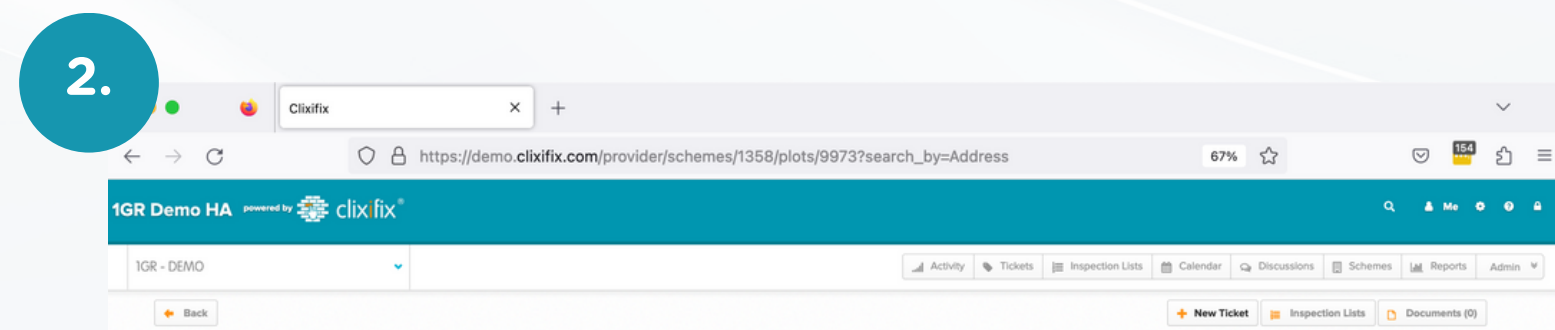
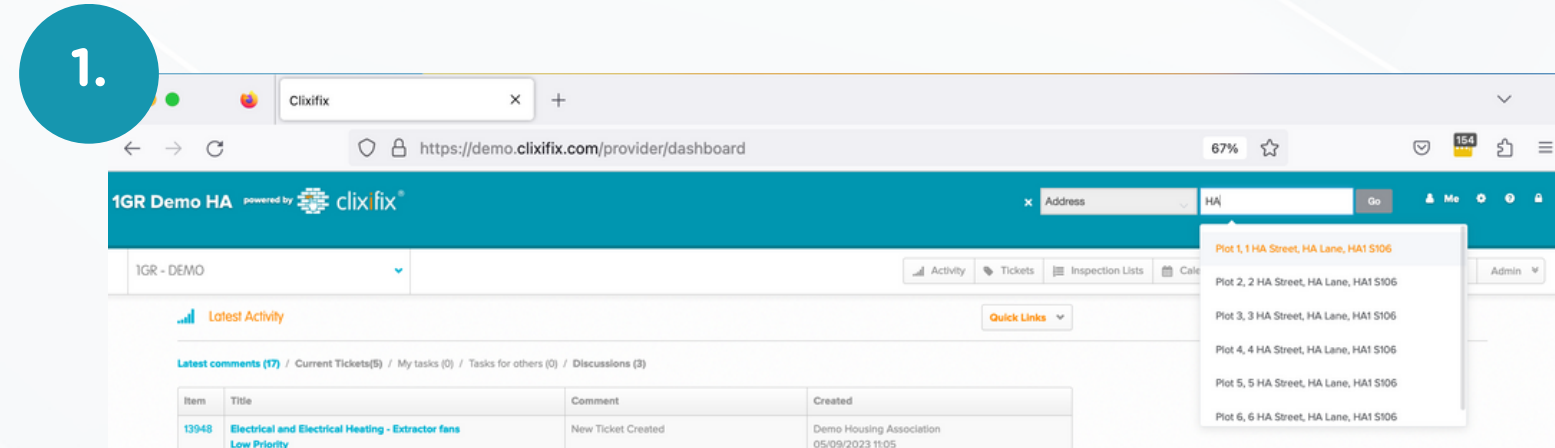
04 6 Steps to reporting a defect

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Step 1. Click on the Search icon to open the search to find the relevant plot.

Step 2. Once located click **+New Ticket**.

Step 3. Scheme and plot information will be prefilled in the ticket creation box. Check these are correct and click **Next Step**.



05 6 Steps to reporting a defect

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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.

4. New Ticket

Scheme Defect Contact Review

Priority and Defect

Priority
Low

Choose Defect Category

- Attic
- Chimneys, Roofs and Drains
- Communal Areas
- Damp
- Electrical and Electrical Heating
- External Areas and Garages
- Internal Walls / Floors / Stairs
- Kitchens
- Plumbing and Heating systems
- Sundries
- Windows and Doors

Sub-Category

Prev Step Next Step

5. New Ticket

Scheme Defect Contact Review

Scheme and Plot

Scheme
1 HA Demo Scheme - S106

Plot
1- 1 HA Street, HA Lane, HA1 S106

Defect

Priority
Low

Defect Category
Electrical and Electrical Heating

Sub-Category
Electric sockets

Defect Description
Electric socket in master bedroom is loose

Contact Details

Full Name
Mr Tenant

Home Phone Number
123456789

Mobile Number

Other Comments
Night worker

Supporting Documents

Add Document

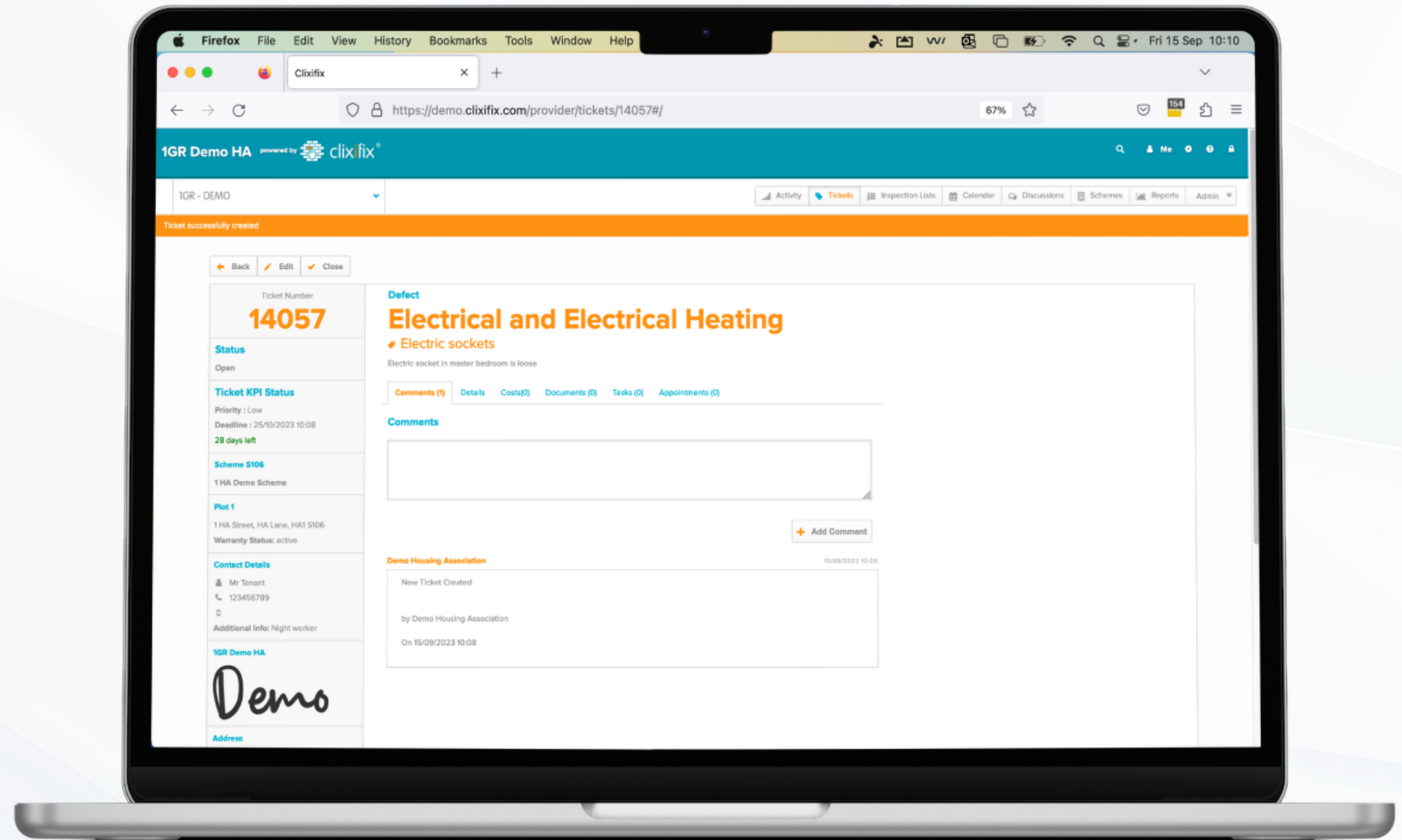
Browse... No files selected.

Prev Step Post ticket and add new Post Ticket

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 a reported defect you become aware of.



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

14057

Status

Open

Ticket KPI Status

Priority : Low

Deadline : 25/10/2023 10:08

27 days left

Scheme S106

1 HA Demo Scheme

Plot 1

1 HA Street, HA Lane, HA1 S106

Warranty Status: active

Contact Details

Mr Tenant

123456789

Additional Info: Night worker

1GR Demo HA

Demo

Address

1 HA Street

HA Lane

08 Creating a Inspection List

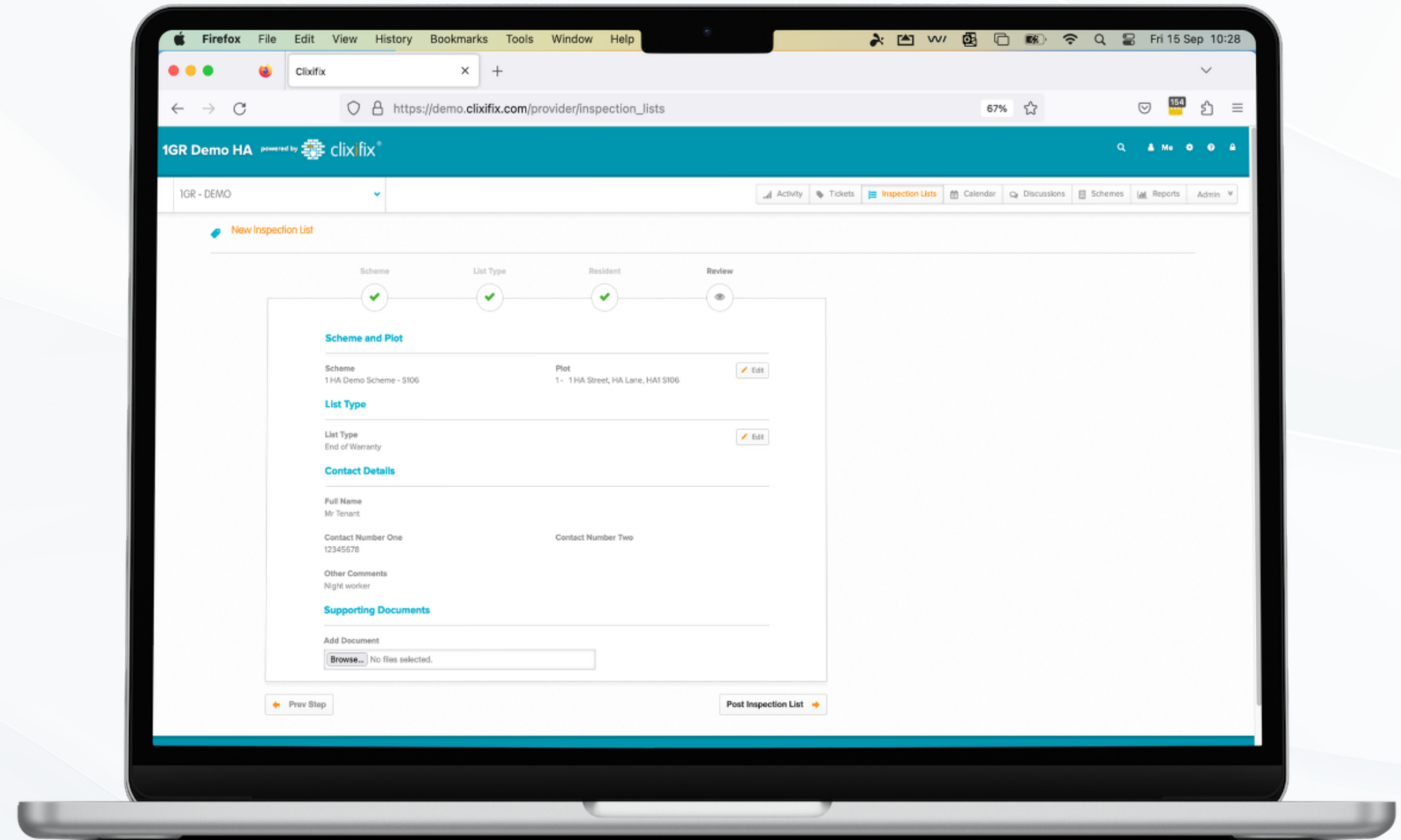
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Use the Search Bar to locate the property.

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

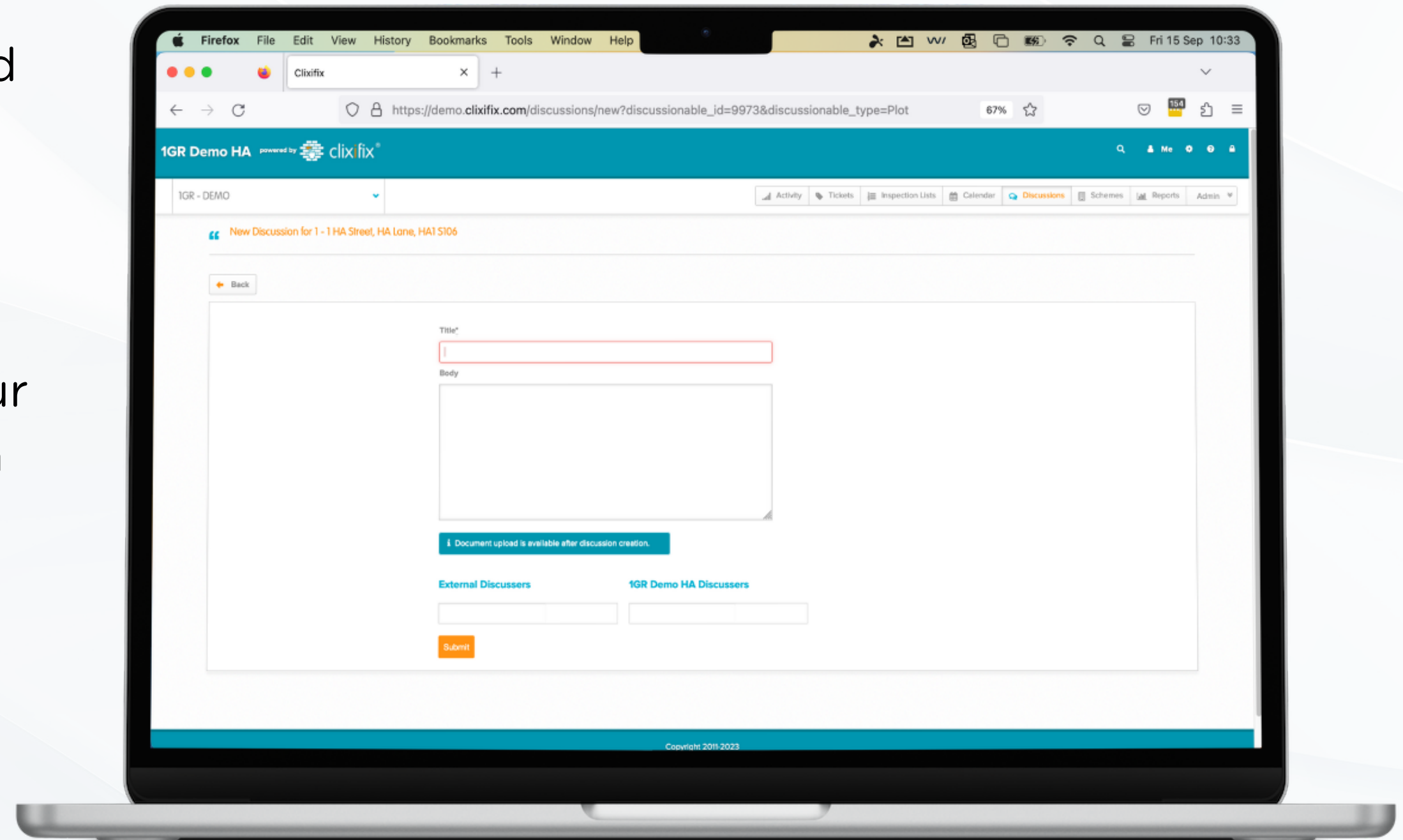
The quickest and simplest way to contact your Principal Contractor would be to raise a **Discussion**.

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.



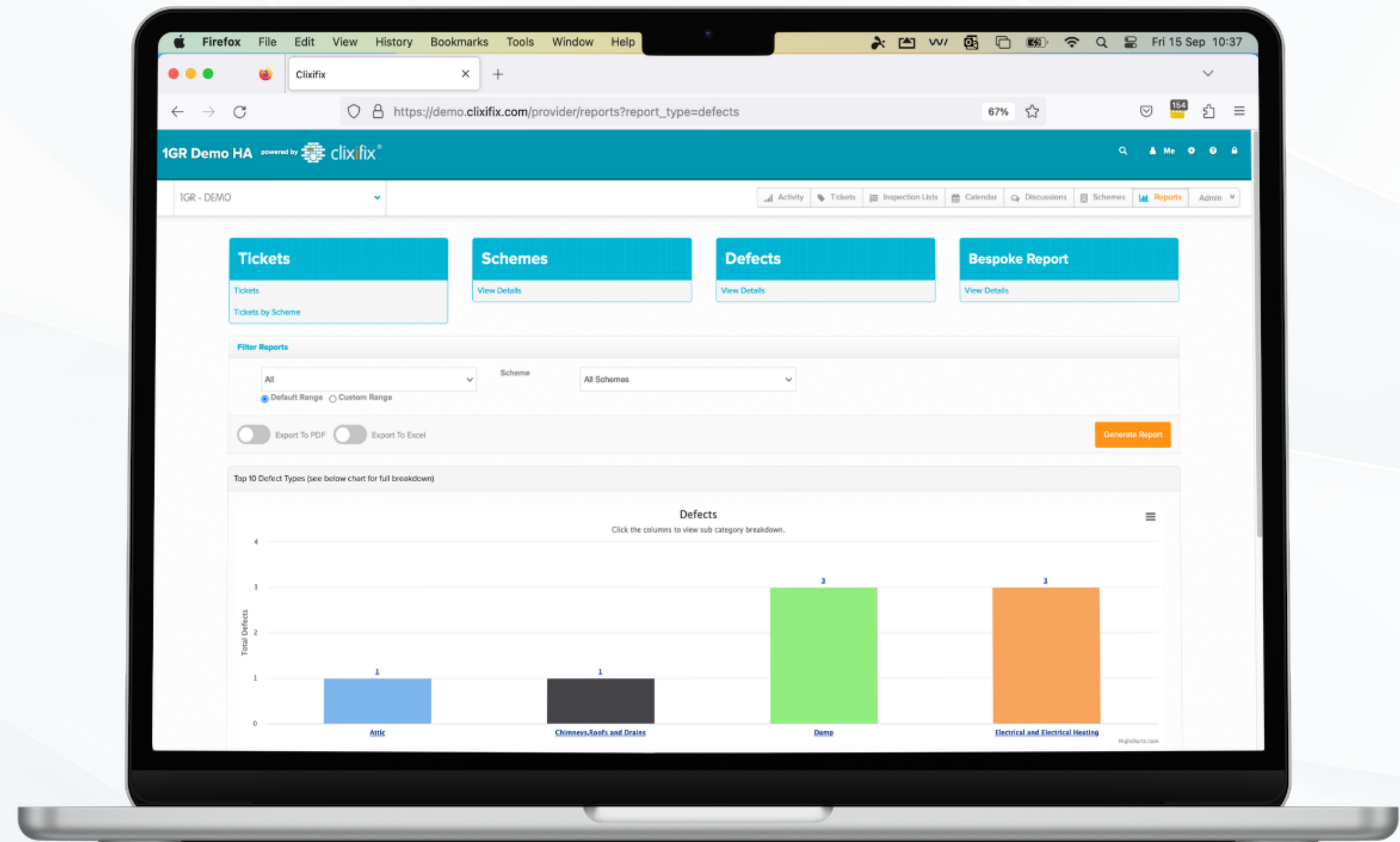
10 Reports

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



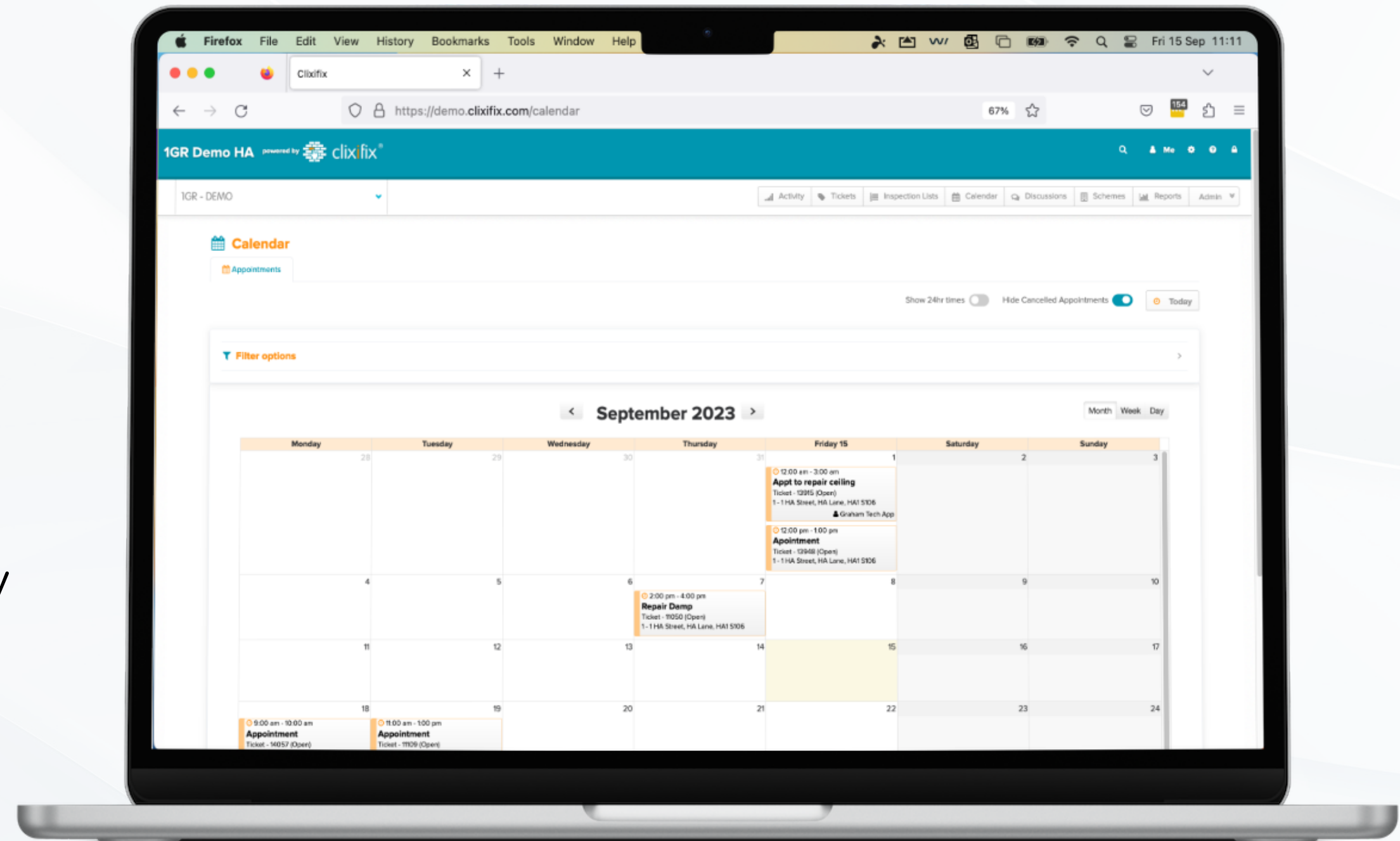
11 Calendar and Appointments

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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.

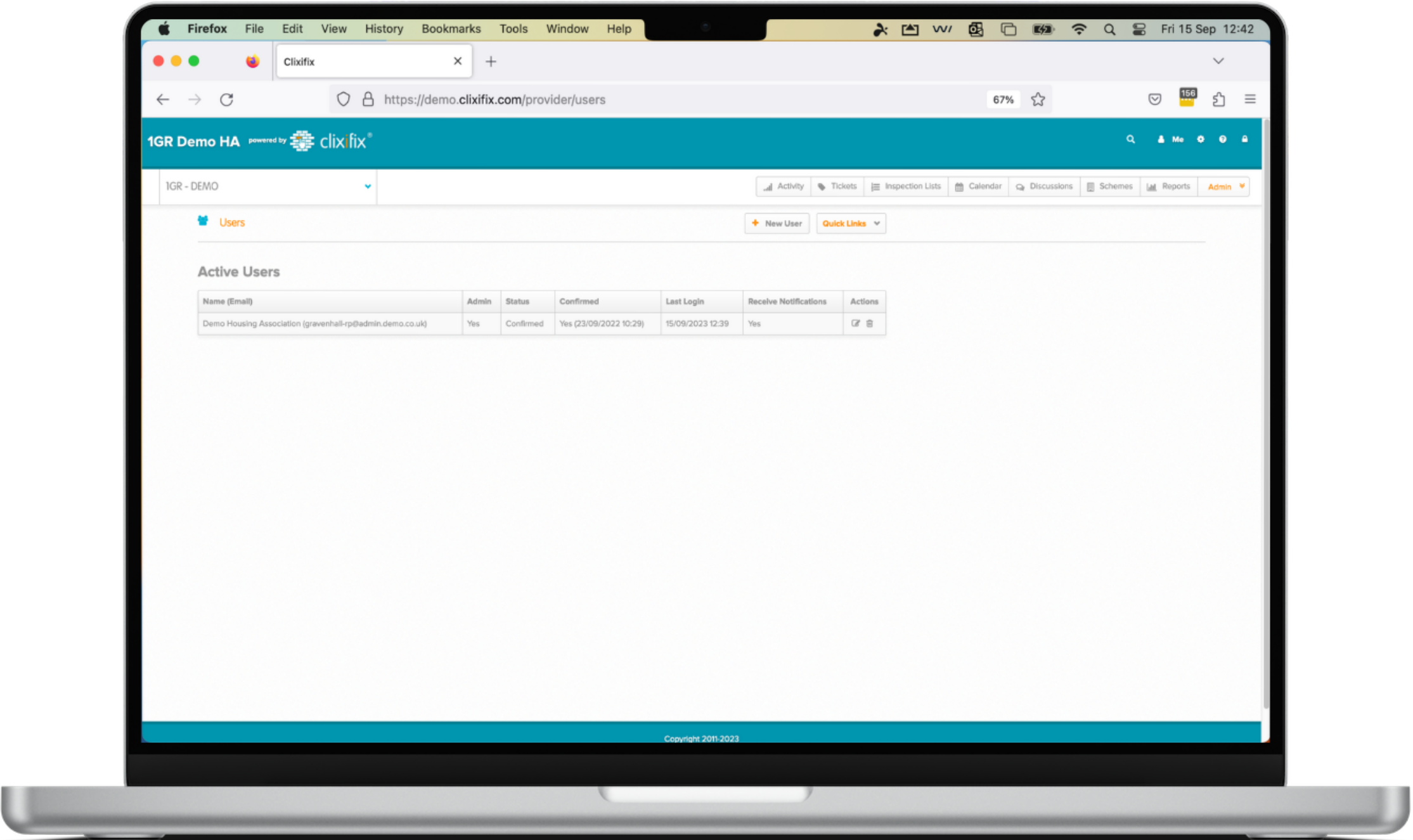


12 Managing Users

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 Client Portal

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- ✓ 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





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

Support