

The background features a stylized illustration of a house with a gabled roof, a chimney, a window, and a door. To the left of the house is a tree with a circular canopy, and in front of it is a bush. The entire scene is rendered in shades of blue and white against a solid teal background.

**clixifix**<sup>®</sup>

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

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Step-by-Step User Guide  
for the Client Portal

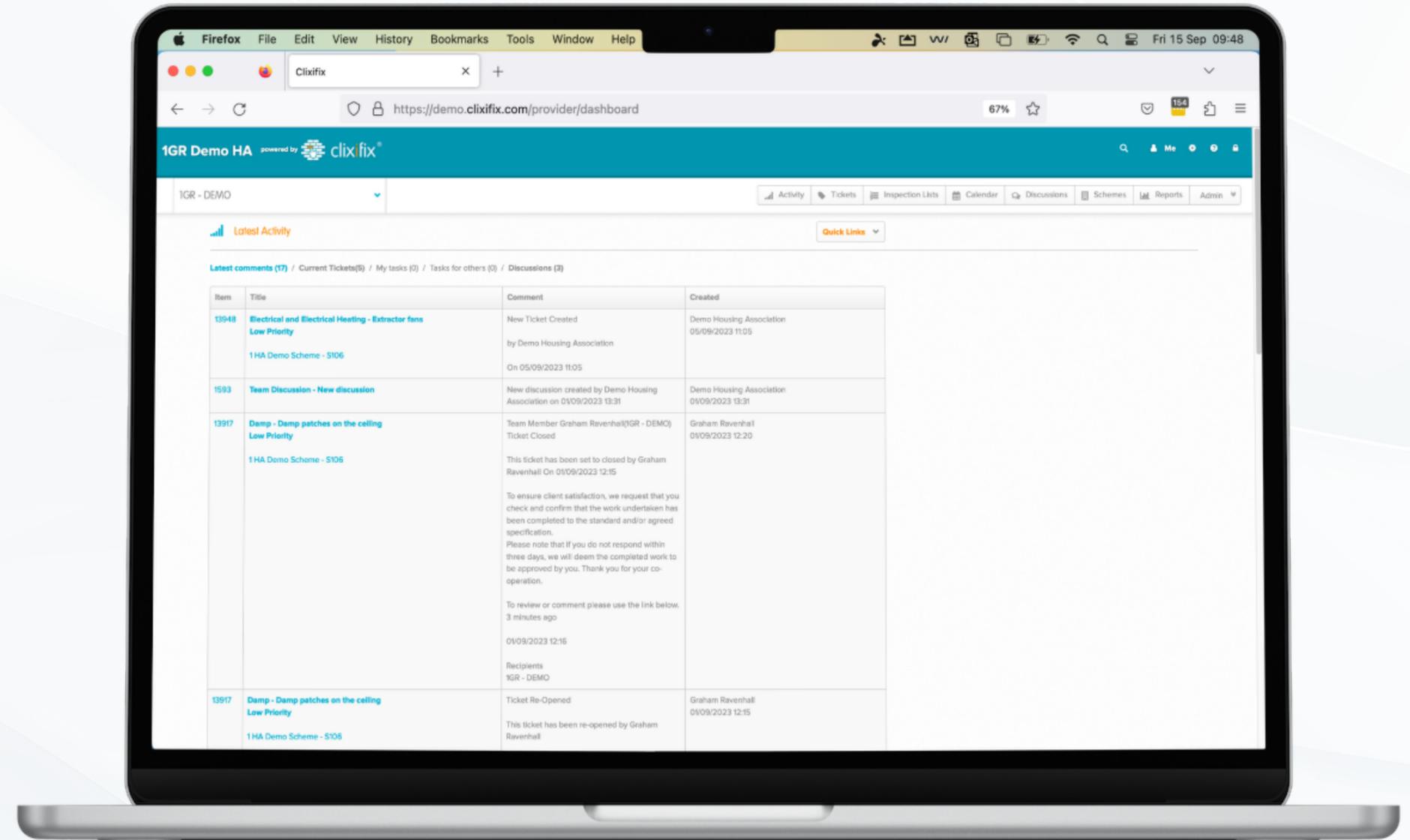
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# 03 Activity Feed

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

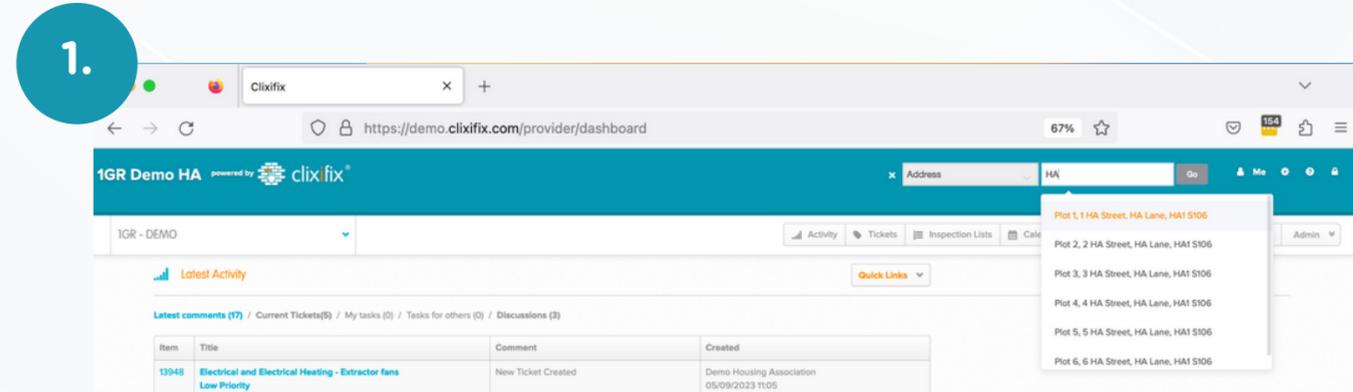
You can always return to this screen by clicking the **Activity** button in the toolbar.

All activities are listed in chronological order of oldest first

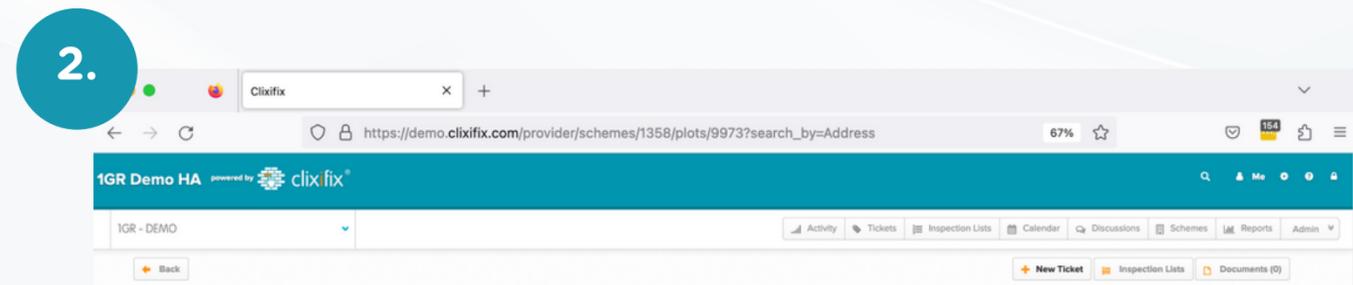


# 04 6 Steps to reporting a defect

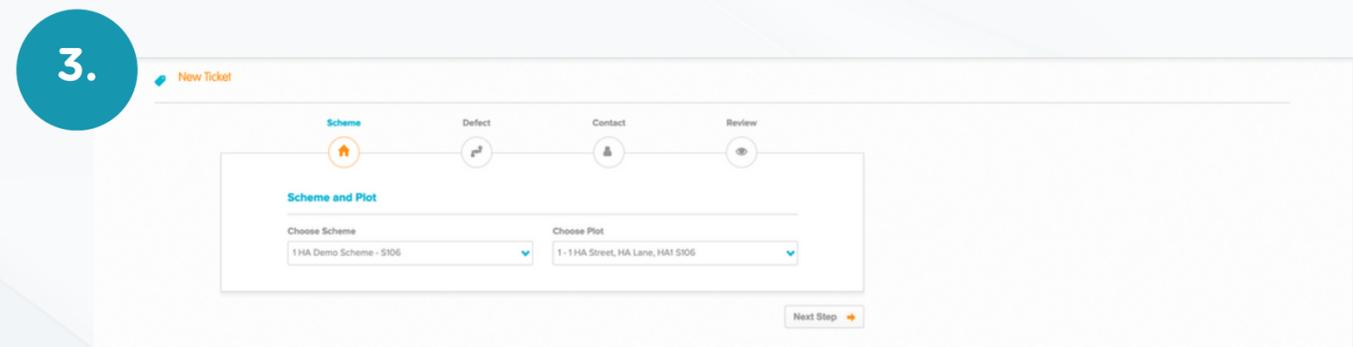
**Step 1.** Click on the Search icon to open the search to find the relevant plot.



**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

**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

Progress bar: Scheme (checked), Defect (active), Contact, Review

**Priority and Defect**

Priority: Low

Choose Defect Category: [Dropdown menu open with options: 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: [Dropdown menu]

Buttons: Prev Step, Next Step

5. New Ticket

Progress bar: Scheme (checked), Defect (active), Contact, Review

**Scheme and Plot**

Scheme: 1 HA Demo Scheme - S106 | Plot: 1 - 1 HA Street, HA Lane, HA1 S106 [Edit]

**Defect**

Priority: Low [Edit]

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: [Field]

Other Comments: Night worker

**Supporting Documents**

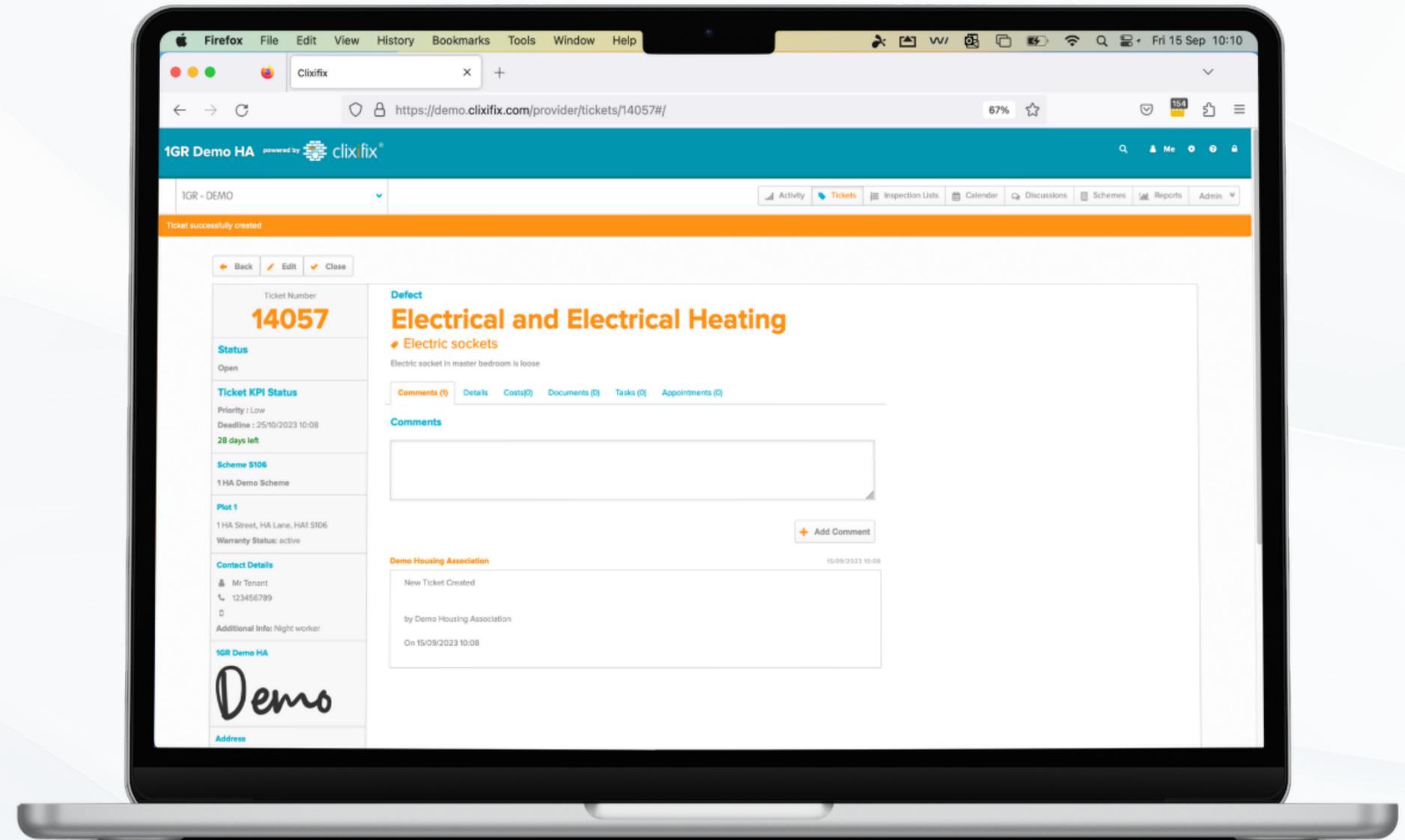
Add Document: [Browse...] No files selected.

Buttons: 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**

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**Status**  
Open

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**Ticket KPI Status**  
Priority : Low  
Deadline : 25/10/2023 10:08  
27 days left

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**Scheme S106**  
1 HA Demo Scheme

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**Plot 1**  
1 HA Street, HA Lane, HA1 S106  
Warranty Status: active

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**Contact Details**  
Mr Tenant  
123456789  
Additional Info: Night worker

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**1GR Demo HA**  
**Demo**

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**Address**  
1 HA Street  
HA Lane

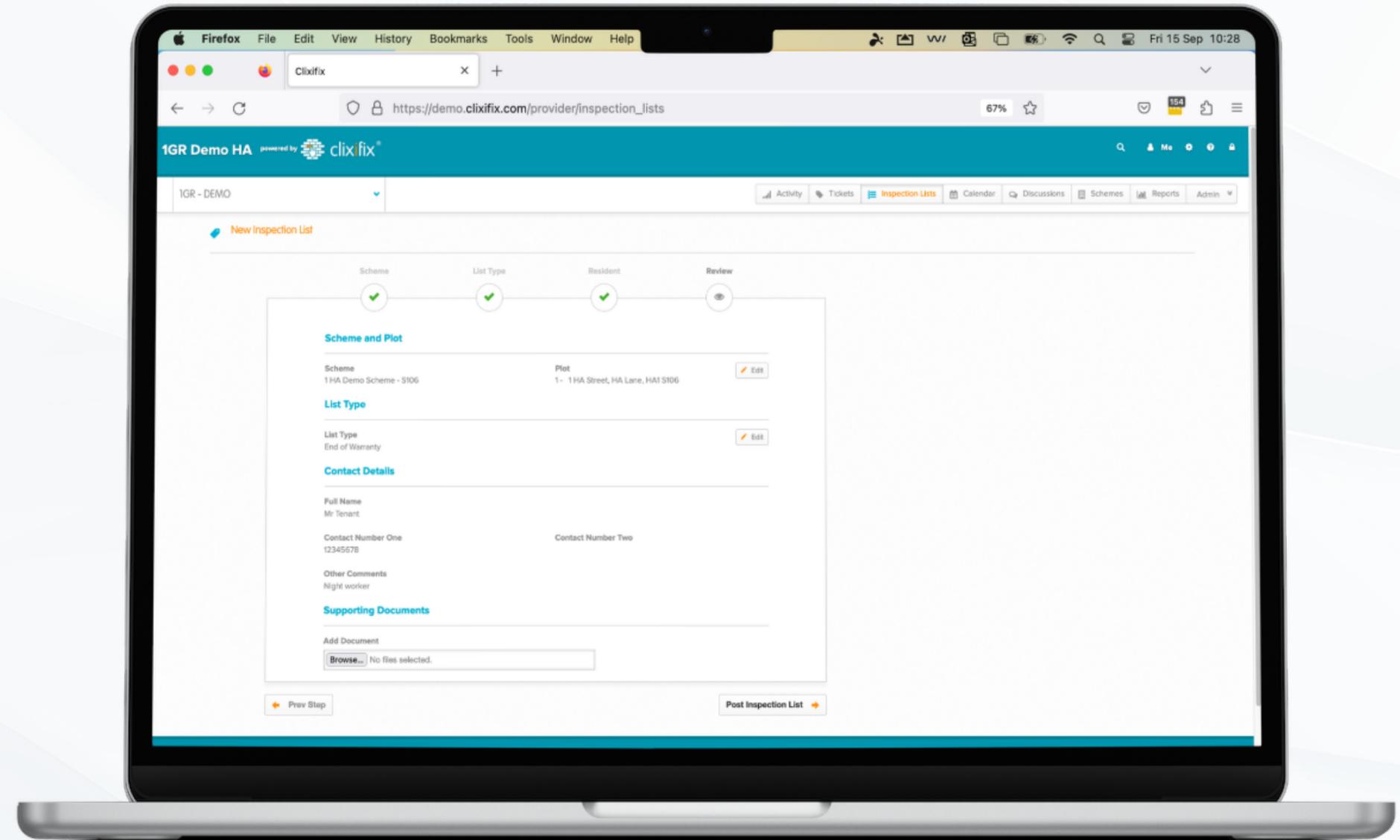
# 08 Creating a Inspection List

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

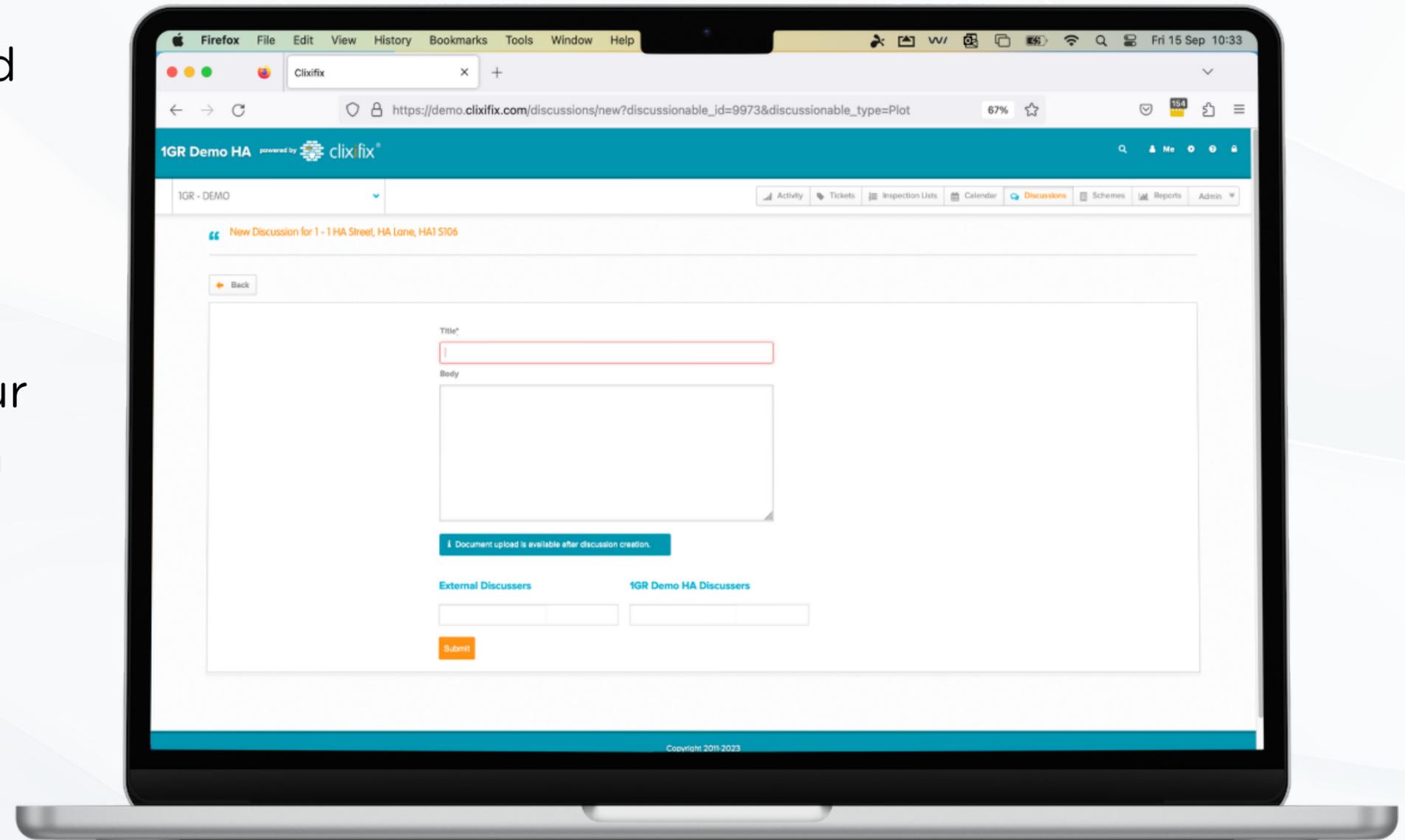
The quickest and simplest way to contact your Principal Contractor would be to raise a **Discussion**.

## 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.

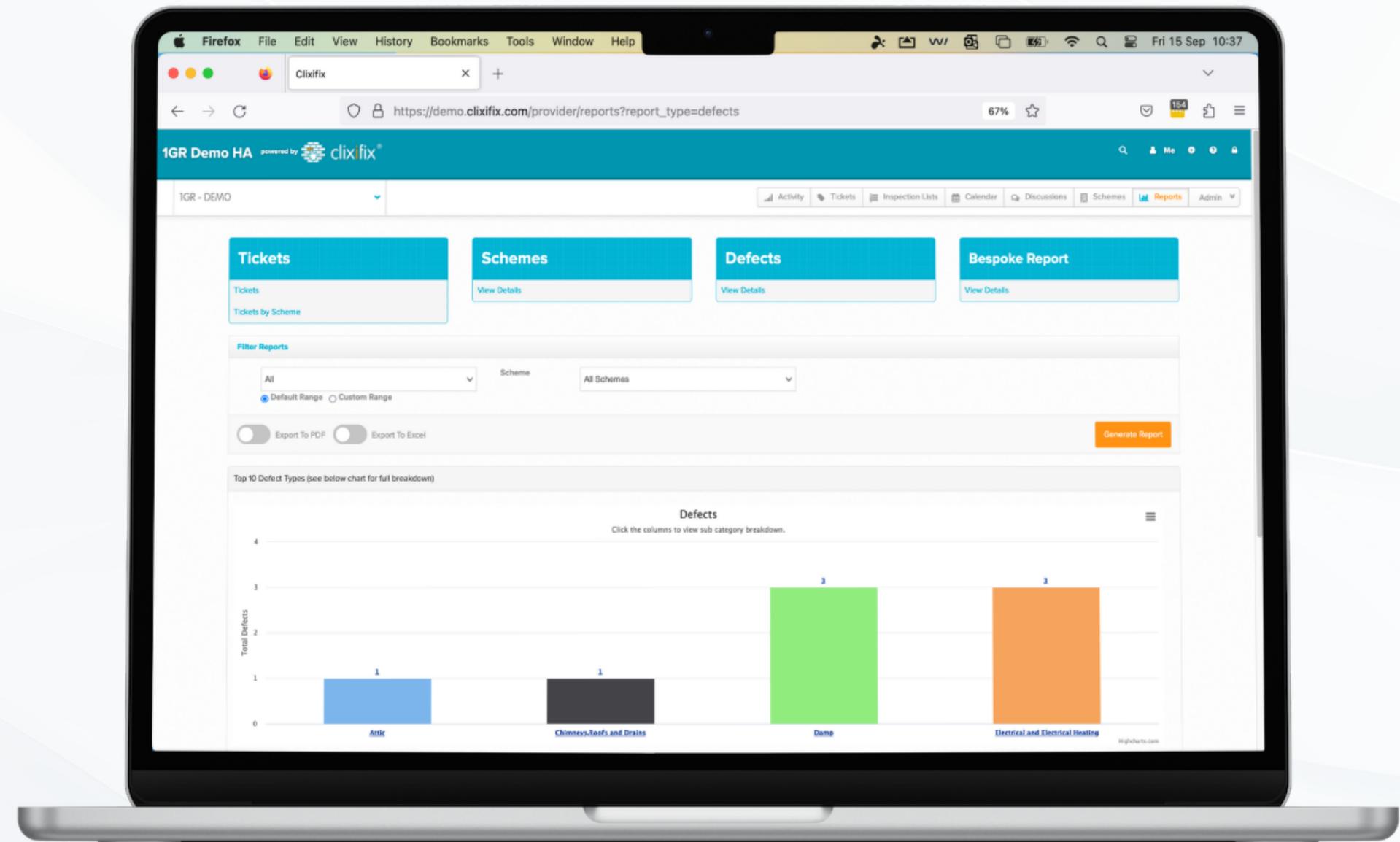


# 10 Reports

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

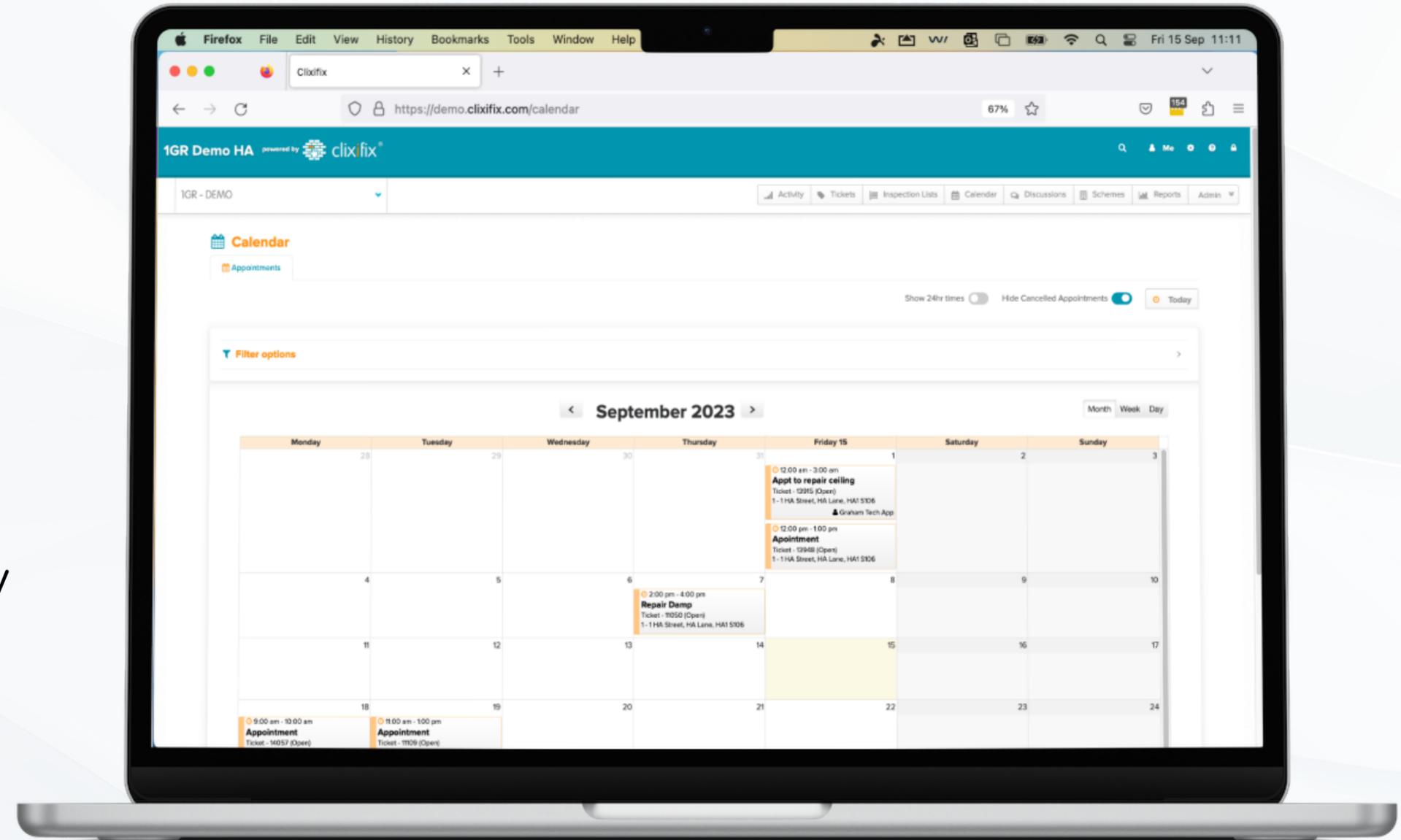


# 11 Calendar and Appointments

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.

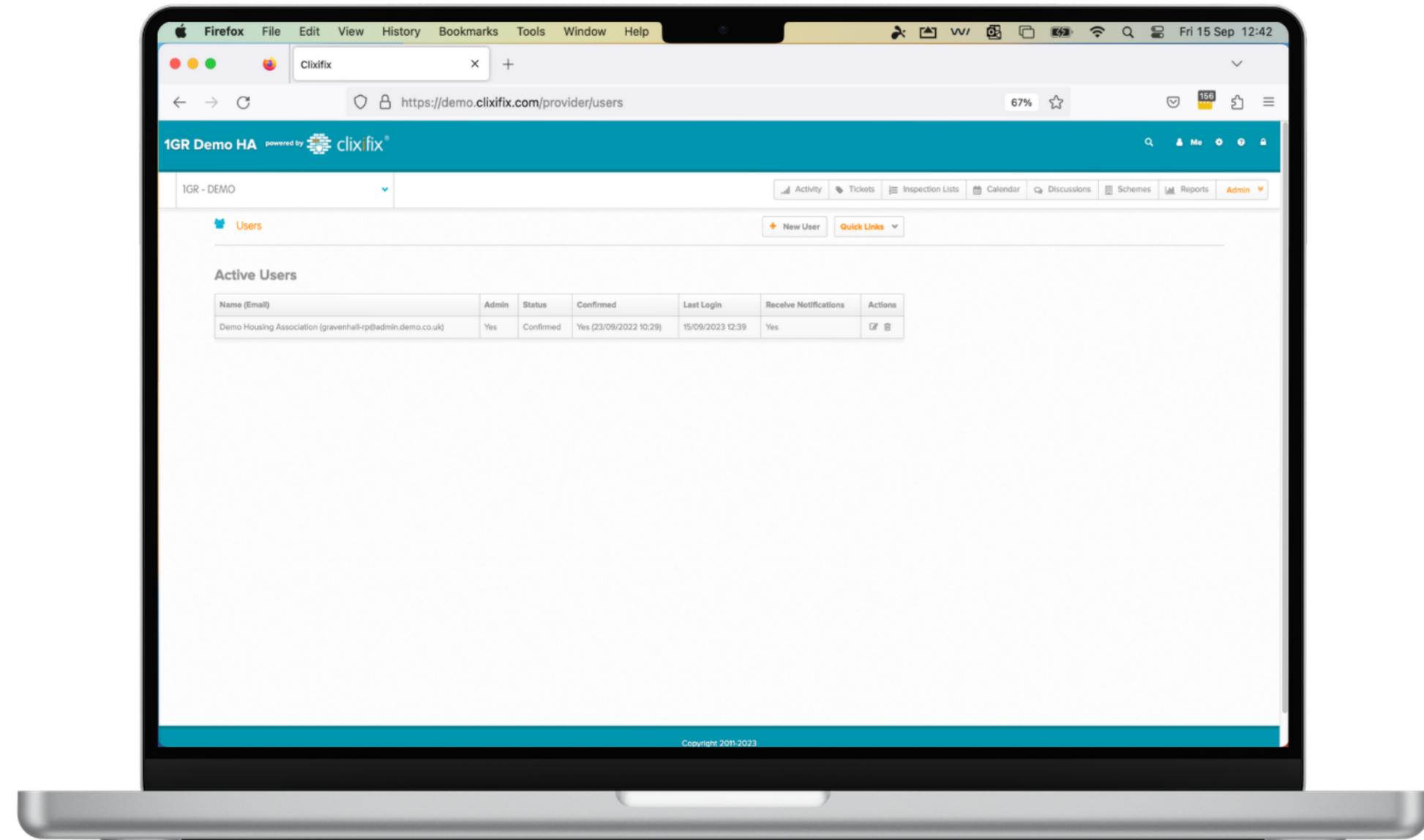


# 12 Managing Users

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

- ✓ 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



The logo for clixifix, featuring the word "clixifix" in a white, lowercase, sans-serif font. The letter "i" is highlighted in orange. A registered trademark symbol (®) is located to the upper right of the "x". A thin orange horizontal line is positioned below the "clixifix" text.

clixifix<sup>®</sup>

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

**Support**