



Simplifying Customer Care software for the construction industry

SUB-CONTRACTOR USER GUIDE

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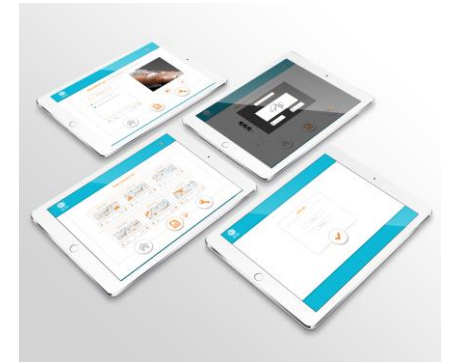
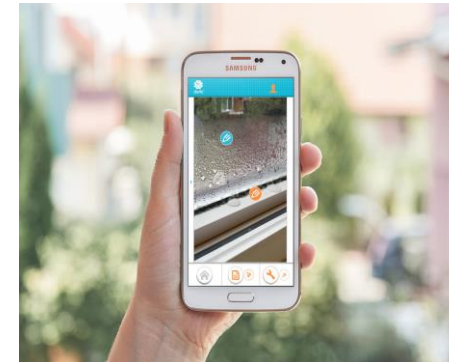
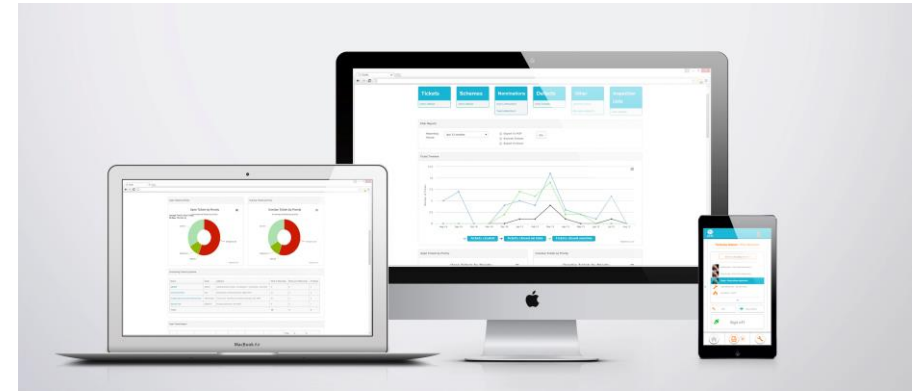


# What is clixifix®

clixifix is an award-winning defect management & resolution platform that has been 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

You will start to receive jobs through the clixifix® system, this short guide has been designed to help you get started.



# Key benefits for Sub-Contractors

- ✓ Free to use for sub-contractors
- ✓ Nothing to download/install
- ✓ Ability to accept & complete jobs digitally
- ✓ Capture images directly to Tickets & Inspection Lists in real time
- ✓ Create appointments using the shared clixifix® calendar for jobs
- ✓ Digitally sign off all completed nominations and capture resident signature
- ✓ Collaboration between all stakeholders



# How to create a clixifix® shortcut

If you use clixifix through the browser on you mobile device, you can add a shortcut to quickly get access.

## Android Devices

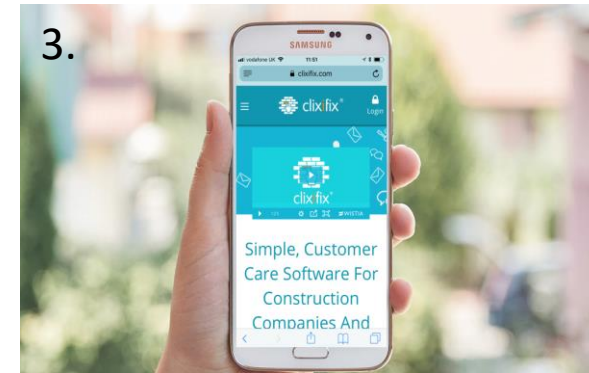
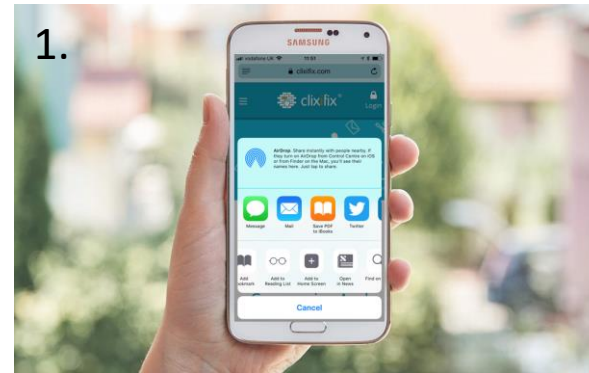
- Open your account in Google Chrome.
- Tap on the star and add it to your bookmarks.
- Use the menu button an open your bookmarks.
- Find your bookmark for clixifix, press down and hold. An action menu will appear.
- Select "Add to home screen."

## Windows Phone

- Open your account in Internet Explorer.
- Tap the three dots in the bottom right corner of the Windows Phone 7 and drag it up to view the options menu.
- Select the "pin to start" option to add the clixifix webpage to your Home Screen.

## iPhone / iPad

- Open your account in Mobile Safari.
- Tap the icon, which is a square with an arrow, to open preferences to save the website.
- Here you have the ability to add to favourites, add a bookmark, add to reading list or our preference is add to home screen.
- Tap "Add to Home Screen" icon and name the bookmark "clixifix."



# Tickets (Nominations)

Your client will raise a Ticket when a resident reports a defect.

Once a Ticket has been created & if it is deemed your contract responsibility, your client will instruct you via clifix®.

- The system will generate a notification via email to alert you that you have been nominated. (See image 1)
- The email will also have your Job Sheet attached for your convenience.
- Click on the link within the email to be directed to your clifix® account, here you can either **“Accept/Reject”** the nomination accordingly. (see image 2)
- Each ticket is given its own unique reference number for audit trail purposes. (see image 2)

Unique Reference Number

The screenshot shows a ticket nomination interface. At the top, the ticket number '4326' is circled in red. Below it, the status is 'In progress'. The nomination KPI status shows a priority of 'Low', a deadline of '19/07/2019 12:45', and '102 days overdue'. The scheme is 'Scheme 2' with a handover date of '27/09/2019'. The plot is 'Plot 1' at '(Story Homes) St Edmund's Manor - TS21 2JX'. The tenants details include 'Test Homeowner' with contact number '076554654'. The defect title is 'Electrical and Electrical Heating' with a sub-title 'Door Bell' and a description 'boller error'. The nomination details show 'Download Contractor Instruction Form' and 'Status: NOMINATING'. The instructions section has 'Reject' and 'Accept' buttons, with 'Accept' circled in red. A box labeled 'Accept/Reject Nomination' points to these buttons.

The screenshot shows an email notification for a ticket nomination. It includes a house icon, a 'CLIFIX' logo, and a 'View nomination on clifix' link. The email text says: 'You can also respond to this notification by replying to this email, the response will automatically update clifix.' Below this is a table with ticket details:

Ticket	Reference Number	Defect Title	Priority	Deadline
5288		Electrical and Electrical Heating	Low	21/02/2020 11:50

Below the table, it says: 'NB Please quote your ticket number on invoices'. The description is 'Loose sockets to the master bedroom wall'. The date defect reported is '14/01/2020 11:50' and the date for instruction is '14/01/2020'. The instructions section says: 'Please respond and repair to the following issue(s) and complete any making good required as indicated on the enclosed instruction/job sheet. You are required to attend to the defects noted on this works order within the timescales stated within the priority table.' There is a 'View Job On Clifix' link and a 'Thanks' message. The clifix logo is at the bottom. The scheme and plot details are: Scheme Code: Scheme 2, Scheme Name: Scheme 2, Plot Number: 1, Plot Location: 10 The Warren, Hurst Green, Clitheroe BB7 9QH. Contact details are: Full Name: Thomas Smith, Contact Number: 01723 845778, Mobile Number: 07458090958.

## 4 Simple Steps to using clixifix®

Once a ticket has been created and if it's deemed to be your responsibility, your client will instruct you via clixifix®.

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**Step 1:** When a client nominates you against a reported defect, you will be notified by email. The email will have your **"Job Sheet"** attached for your convenience. Using the link in the email, click to **"View Job On Clixifix"**.

**Step 2:** Firstly, they will need to know if you will be carrying the work out. If so, please **"Accept"** the job. If not, please **"Reject"** with a reason.

**Step 3:** Should you need to communicate with your client regarding this issue rather than calling or emailing them, simply just add your **"Comment"**, this will notify them immediately.

*Note: Your client may have uploaded some additional photographs we've received. View these under the **"Documents"** tab. You may wish to add your own if you feel something doesn't look right*

**Finally:** Once you've completed the work, all you need to do is sign it off! Select the **"Nomination"** tab, hit **"Complete"** & use your finger to capture a signature

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**These 4 steps should take no longer than 60 seconds!**

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# Tickets Top Tips

Once you accept a ticket, the system will automatically update your client in real-time.

## Top Tips:

- ✓ If you need to **“Reject”** a ticket, you **MUST** give a reason why to your client.
- ✓ Keep apprised of activity relating to the ticket and add any updates for your clients via the **“Comments”** tab.
- ✓ The **“Costs”** tab indicates any costs which may have been sent for your approval.
- ✓ The **“Documents”** tab is where all the imagery is stored for the ticket in question. You can also add additional images here as required.
- ✓ Keep track of any **“Tasks”** assigned to you for the ticket via the **“Tasks”** tab.
- ✓ Create and manage Appointments for each ticket via the **“Appointments”** tab.
- ✓ Once you have repaired the defect, click **“Complete”** via the **“Nominations”** tab and digitally sign off your nomination with relevant counter-signatory (Resident/Site Manager etc.)

The screenshot displays a ticket management interface for ticket number 4326. The ticket is titled "Electrical and Electrical Heating" and is categorized as a "Defect" with the sub-category "Door Bell". The status is "In progress" and the description is "boiler error". The interface includes several tabs: "Comments (2)", "Nomination", "Costs(0)", "Documents (0)", "Tasks (0)", and "Appointments (0)". The "Comments" section shows two entries: one from "Contractor Kate's Demo Sub Contractor" dated 10/12/2019 10:25 with the text "nomination\_accepted", and another from "Kate Murray" dated 11/06/2019 12:45 with the text "Ticket 4326 Nomination for Kate's Demo Sample Sub Contractor Please respond and repair to the following issue(s) and complete any making good required as indicated on the enclosed instruction/job sheet. You are required to attend to the defects noted on this works order within the timescales stated within the priority table. Nominated by Kate Murray On 11/06/2019 12:45". There is an "Add Comment" button at the bottom right of the comments section.

Ticket Number <b>4326</b>	<b>Defect</b> <b>Electrical and Electrical Heating</b> Door Bell boiler error
<b>Status</b> In progress	<b>Comments (2)</b>   Nomination   Costs(0)   Documents (0)   Tasks (0)   Appointments (0)
<b>Nomination KPI Status</b> Priority : Low Deadline : 10/07/2019 12:45 109 days overdue	<b>Comments</b>
<b>Scheme</b> Scheme 2 Handover Date: 27/09/2019	<b>Contractor Kate's Demo Sub Contractor</b> 10/12/2019 10:25 nomination_accepted
<b>Plot 1</b> (Story Homes) St Edmund's Manor - TS21 2JX Purchaser: David Wilson	<b>Kate Murray</b> 11/06/2019 12:45 Ticket 4326 Nomination for Kate's Demo Sample Sub Contractor Please respond and repair to the following issue(s) and complete any making good required as indicated on the enclosed instruction/job sheet. You are required to attend to the defects noted on this works order within the timescales stated within the priority table. Nominated by Kate Murray On 11/06/2019 12:45
<b>Contact Details</b> Test Homeowner 076554654 Additional Info:	<b>Add Comment</b> <input type="text"/> <input type="button" value="+ Add Comment"/>



# Costs

Your clients may use one of our additional features called “Costs”. The feature enables our clients to keep track of aftercare expenditure and allows for external delegation of costs for audit trail purposes.

If your client sends you any associated costs for you to accept, these will appear in the “Costs” tab of the ticket.

Simply “Accept” the cost or “Reject” the cost as applicable. The system will then automatically alert your client that you have responded.

Should you have any queries about any Costs you have been sent, please contact your client(s) directly to discuss.

Ticket Number  
**5208**

**Status**  
In progress

**Nomination KPI Status**  
Priority : Low  
Deadline : 31/01/2020 11:23  
20 days left

**Scheme**  
Scheme 1  
Handover Date: 26/04/2019

**Plot 1**  
Scheme 1 - AB1 2CD

**Contact Details**  
John Smith  
077774812652  
Additional Info:

**Defect**  
**Internal Walls, Floors & Stairs**

**Walls**

Joiner has caused damage to the hallway

Comments (2) Nomination **Costs(1)** Documents (0) Tasks (0) Appointments (0)

Date/Time	Amount	Description	Agreed	Actions
02/01/2020	£150.00	As discussed, please accept cost for the associated ticket.		<input checked="" type="checkbox"/> Accept <input type="checkbox"/> Reject

This site says...

Accept this cost ?

OK Cancel

Ticket Number  
**5208**

**Status**  
In progress

**Nomination KPI Status**  
Priority : Low  
Deadline : 31/01/2020 11:23  
20 days left

**Scheme**  
Scheme 1  
Handover Date: 26/04/2019

**Plot 1**  
Scheme 1 - AB1 2CD

**Contact Details**  
John Smith  
077774812652  
Additional Info:

**Defect**  
**Internal Walls, Floors & Stairs**

**Walls**

Joiner has caused damage to the hallway

Comments (2) Nomination **Costs(1)** Documents (0) Tasks (0) Appointments (0)

Date/Time	Amount	Description	Agreed	Actions
02/01/2020	£150.00	As discussed, please accept cost for the associated ticket.	Yes	

# Digital Sign-Off

Once you are confident the job has been completed, you can then **“Complete”** your nomination.

When you click the **“Complete”** button, the **“Capture Signature”** box will open. This feature works in the same way as signing for Amazon parcels etc.

After you complete your information and you scroll down the field, it will prompt you for a **“Contact”** name & signature. This could be a resident or an operative of your client, such as a Site Manager.

Click the **“Complete Nomination & Capture Signatures”** box, after this has been completed, the system will automatically notify your client.

In the event you need to go back to the ticket, or it has been completed in error, the option to **“Re-Open”** will appear.

**Defect**

## Electrical and Electrical Heating

🔧 Door Bell

boiler error

Comments (2) **Nomination** Costs(0) Documents (0) Tasks (0) Appointments (0)

### Nomination Details

📄 Download Contractor Instruction Form

**Status**

ACCEPTED

**Instructions**

Please respond and repair to the following issue(s) and complete any making good required as indicated on the enclosed Instruction/Job sheet. You are required to attend to the defects noted on this works order within the timescales stated within the priority table.

Complete

clifix

**Capture signature for Operative**

Type Your Full Name Here\*

• Clear

Draw your signature in the above box

By clicking save, I agree that the signature will be an electronic representation of my signature.

**Complete Nomination & Capture Signatures**

Ensure you click this to capture signatures

# Why contractors love clixifix®



“ I get better cover for me on completion of jobs now that I know I can add the photos I take to the tickets. Saves me time on Health and Safety (on the risk assessments and statement of intent as the statement can be included on the job sheet before it's sent to me)

*Decca's Handyman Services*



“ With clixifix® everything is clear to see, both for the client and the sub-contractors. Jobs are easy to manage; timescales can be put in place and once everyone is happy the job can be closed.

*RGB Group*

clixifix<sup>®</sup>

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