



Simplifying Customer Care software for the construction industry

REGISTERED PROVIDER USER GUIDE

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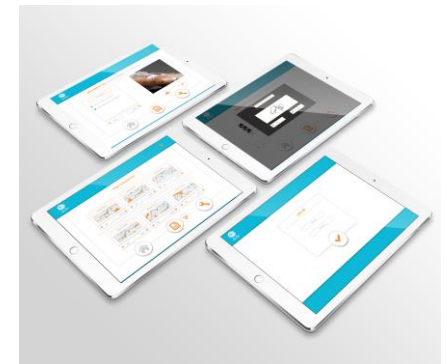
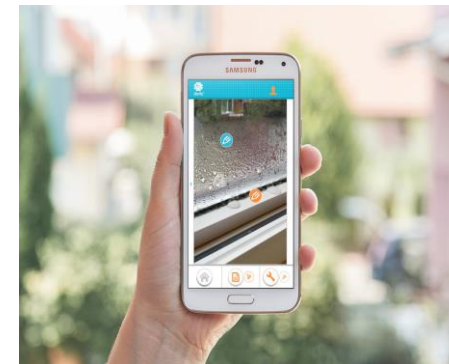


What is clixifix®

clixifix is an award-winning defect management & resolution platform, 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

**Further information on the following can be found on the help section of the clixifix homepage, where you can also watch a short overview video.



Activity Dashboard

Once you have signed in you will see the latest activity and comments across your clixifx suite on respective Tickets and Inspection Lists.

The screenshot shows the 'Activity Dashboard' for the 'Test Housing Association', powered by 'clixifx'. The user is signed in as 'Test Company'. The dashboard displays a 'Latest Activity' section with a table of recent events. The table has four columns: 'Item', 'Title', 'Comment', and 'Created'. The activity items include ticket creation, inspection list completion, and ticket status updates.

| Item | Title | Comment | Created |
|------|--|--|----------------------------|
| 4544 | Electrical and Electrical Heating - Electrical sockets Low Priority Scheme 2 - | New appointment created for Gary Harvey on 04/12/2019 13:00 Details: Ticket 4544 More Information: Created By Kate M On 02/12/2019 13:36 | Kate M 02/12/2019 13:36 |
| 1124 | Handover Inspection List George Drive - | Inspection List Completed Inspection List Completed By Kate M On 02/12/2019 13:31 | 02/12/2019 13:31 |
| 4273 | External Aress & Garages - External Low Priority George Drive - | Ticket put on hold by Kate M On 02/12/2019 13:19 See comment - tenant on holiday | Kate M 02/12/2019 13:19 |
| 5110 | Electrical and Electrical Heating - Electrical sockets Low Priority George Drive - | New Ticket Created by Kate M On 02/12/2019 13:16 | Kate M 02/12/2019 13:16 |
| 5108 | External Aress & Garages - Garden Low Priority George Drive - | Ticket Closed This ticket has been set to closed by Kate M On 02/12/2019 13:12 To ensure client satisfaction, we request that you check and confirm that the work undertaken has been completed to the standard and/or agreed specification. Please note that if you do not respond within three days, we will deem the completed work to be approved by you. Thank you for your co-operation. To review or comment please use the link below. | Kate M 02/12/2019 13:12 |

Creating a Ticket

5 Steps to Creating a Ticket:

1. Using the Search Bar in the top right hand of the screen, locate the address/plot number
2. New Ticket (one defect per ticket)
3. Defect Type & Sub-category (with detailed description)
4. Other Comments (e.g. Main entrance closed)
5. Review & add Supporting Documents (image/document)
6. Post Ticket - A member of the Principal Contractors aftercare team will pick up the ticket and process it accordingly

Test Housing Association powered by clix fix[®] Search bar → Me

Test Company Activity Tickets Inspection Lists Calendar Discussions Schemes Reports Admin

New Ticket

Scheme Defect Tenant Review

Scheme and Plot

Choose Scheme Test Scheme - Choose Plot 1 - Test Place, ABI 2DE

Next Step →

New Ticket

Scheme Defect Tenant Review

Priority and Defect

Priority Emergency

Choose Defect Category Plumbing & Heating Systems Sub-Category

Reference Num.

Defect Description Boiler error

Supporting Documents

Add Document

Choose Files No file chosen

Prev Step Post ticket and add new Post Ticket

Click to add images →

Click to post ticket →

Creating a Ticket Top Tips

- ✓ Please provide a detailed description of the repair or issue.
- ✓ Set the priority of the defect category in line with our SLA's.
- ✓ Add any additional information that will be useful for the person who will be attending the job (*Eg: If the resident works nights and prefers to be contacted after 11am*)

Each ticket has its own unique number which is searchable

The screenshot displays a ticket management interface. On the left, a sidebar contains the following information:

- Ticket Number:** 5207 (highlighted with a black box and an arrow pointing to it from the text above)
- Status:** Open
- Reference Num.:** (empty)
- Ticket KPI Status:** Priority: Low, Deadline: 31/01/2020 14:58, 28 days left
- Scheme:** Holiday Inn Project A
- Area / Zone WC 1**

The main content area shows:

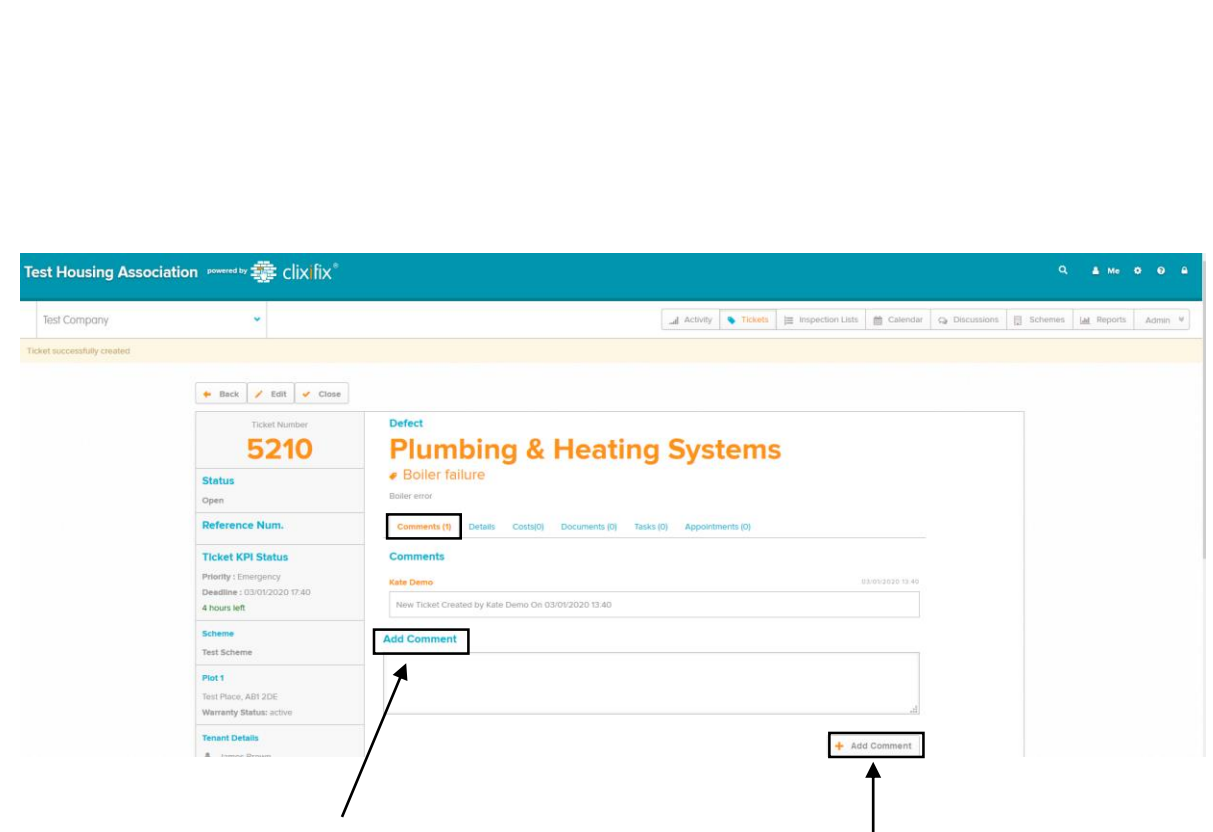
- Defect:** Electrical and Electrical Heating
- Category:** Electrical sockets
- Description:** Socket in reception loose from wall
- Navigation:** Comments (1), Details, Costs(0), Documents (0), Tasks (0), Appointments (0)
- Comments:** A comment by Bob Smith dated 19/12/2019 14:58: "New Ticket Created by Bob Smith On 19/12/2019 14:58"
- Add Comment:** A text input field for adding a new comment.

Comments

Now you have created your ticket, you have an open line of communication with your Principle Contractor regarding your reported defect via the Comments Tab.

Simply Add a Comment to:

- Liaise with your Principle Contractor regarding appointments.
- Request an update.
- Inform your Principle Contractor of any changes to the report defect (i.e. the problem has worsened)

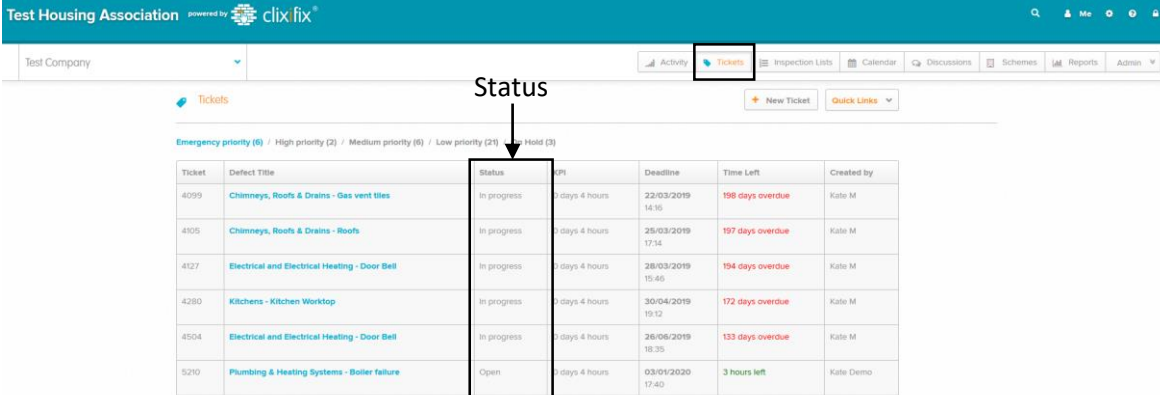


To add a comment just type and press “+ Add Comment”

Ticket Status

There are 4 possible Status levels for Tickets:

1. **Open** – Your Ticket has been raised successfully and your Principle Contractor has been notified.
2. **In Progress** – Your Principle Contractor is working to resolve the defect.
3. **On Hold** – Your Ticket has been placed on hold. This could be for a number of reasons. (e.g. a part requires manufacturing)
4. **Closed** – The Ticket has been resolved.



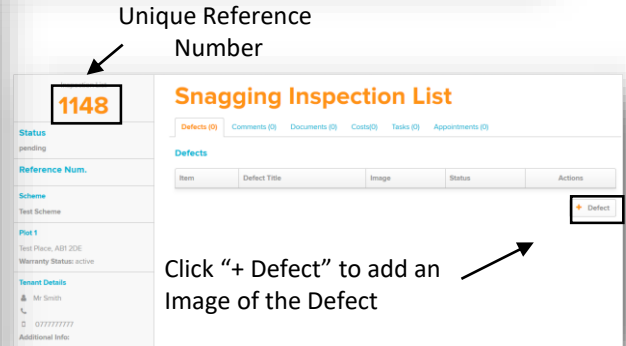
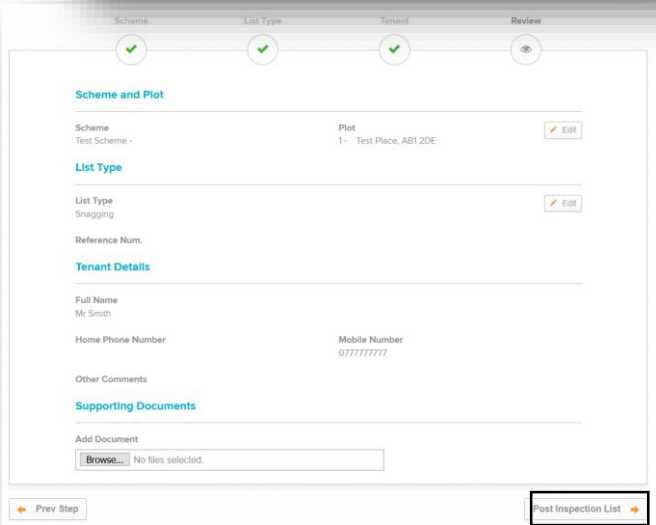
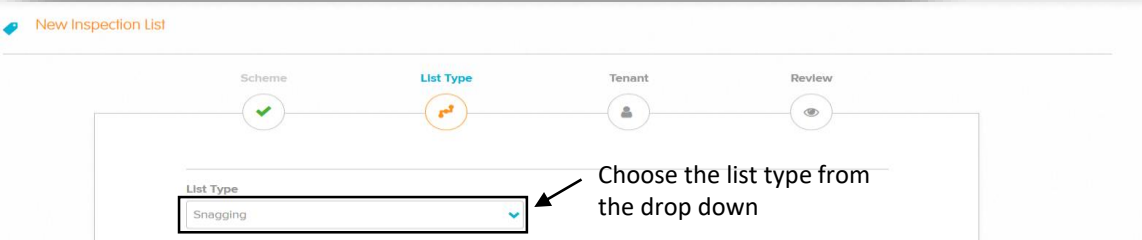
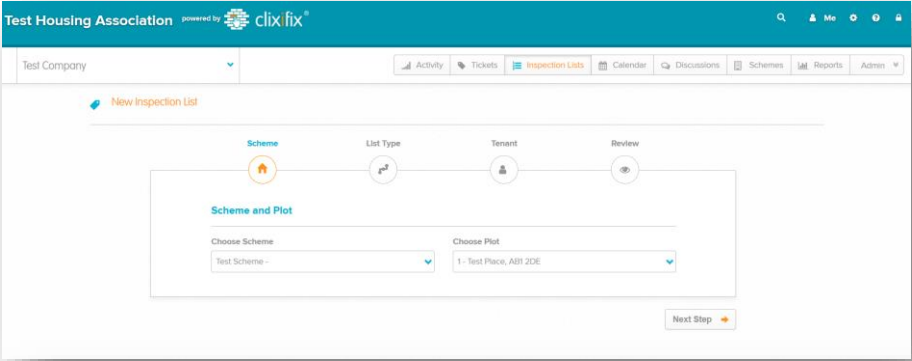
The screenshot shows a web application interface for 'Test Housing Association' powered by 'clix fix'. The 'Tickets' tab is selected, and a table of tickets is displayed. A black box highlights the 'Status' column header, with an arrow pointing to the 'Status' column. The table contains the following data:

| Ticket | Defect Title | Status | ETA | Deadline | Time Left | Created by |
|--------|---|-------------|----------------|------------------|------------------|------------|
| 4099 | Chimneys, Roofs & Drains - Gas vent tiles | In progress | 0 days 4 hours | 22/03/2019 14:16 | 198 days overdue | Kate M |
| 4105 | Chimneys, Roofs & Drains - Roofs | In progress | 0 days 4 hours | 25/03/2019 17:14 | 197 days overdue | Kate M |
| 4127 | Electrical and Electrical Heating - Door Bell | In progress | 0 days 4 hours | 28/03/2019 15:46 | 194 days overdue | Kate M |
| 4280 | Kitchens - Kitchen Worktop | In progress | 0 days 4 hours | 30/04/2019 19:12 | 172 days overdue | Kate M |
| 4504 | Electrical and Electrical Heating - Door Bell | In progress | 0 days 4 hours | 28/06/2019 18:39 | 133 days overdue | Kate M |
| 5210 | Plumbing & Heating Systems - Boiler failure | Open | 0 days 4 hours | 03/01/2020 17:40 | 3 hours left | Kate Demo |

Inspection Lists

Inspection Lists can be compiled and sent via clixifix® to your Principle Contractor.

- ✓ Capture multiple defects to a single list.
- ✓ Add defects & upload images as supporting evidence.
- ✓ Monitor the status of inspection list items.
- ✓ Manage appointments and communicate with your Principle Contractor via “Comments”.



Review information and Post Inspection List

Inspection Lists Cont...

Once you have created your Inspection List, you will be prompted to add Images (defects). You have the option to annotate the image as required.

The system will require you to choose a category & sub-category for your defect.

In the “Defect Description” box, it will help your Principle Contractor if you can be as descriptive as possible. Include the location of the defect (e.g. Hallway).

Once you have captured all the defects, click “Submit this Inspection List” to send to your Principle Contractor.

Choose Category & Sub-Category

Choose Defect Category: Electrical and Electrical Heating

Sub-Category: Electrical sockets

Defect Description: Socket loose in hallway

Be as descriptive as possible

Click “Save Defect”

Inspection List 1144

Status: pending

Plot 1: Some Place - XY1 2ZU

Contact Details: David Wilson

Additional Info: 0777777777

Handover: Date: 27/09/2019

Snagging Inspection List

Defects (2) | Comments (0) | Costs(0) | Documents (0) | Appointments (0)

| Item | Defect Title | Image | Status | Actions |
|-----------|--|-------|--------|---------|
| 1144-5199 | Plumbing & Heating Systems - Boiler failure | | Open | |
| 1144-5198 | Electrical and Electrical Heating - Electrical sockets | | Open | |

Submit this Inspection List

+ Defect

Click to Submit Inspection List if you have captured all defects

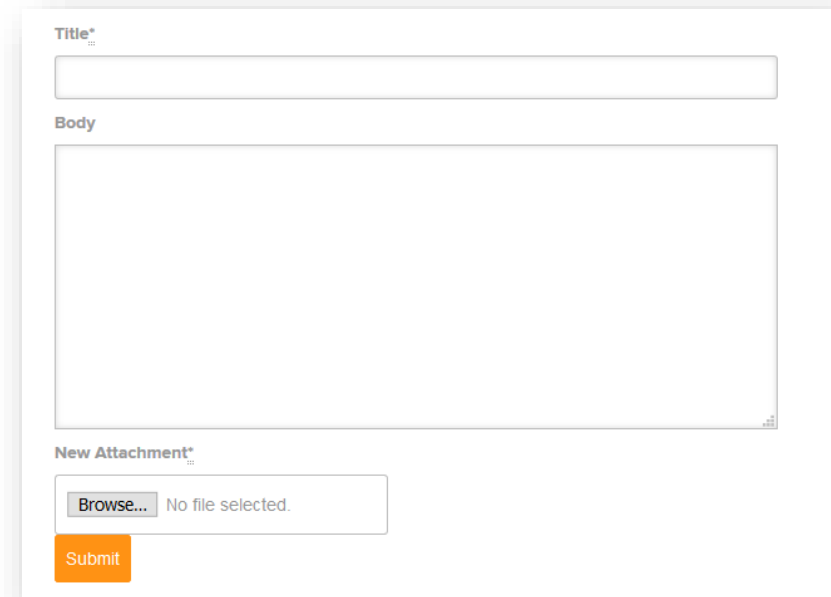
You may have a general enquiry about the project.

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

How to create a Discussion:

1. Title (e.g. Defect Response Time)
2. Detail (e.g. Can you advise what your defect response time would be for a broken tile?)
3. Add file (if applicable)
4. Submit

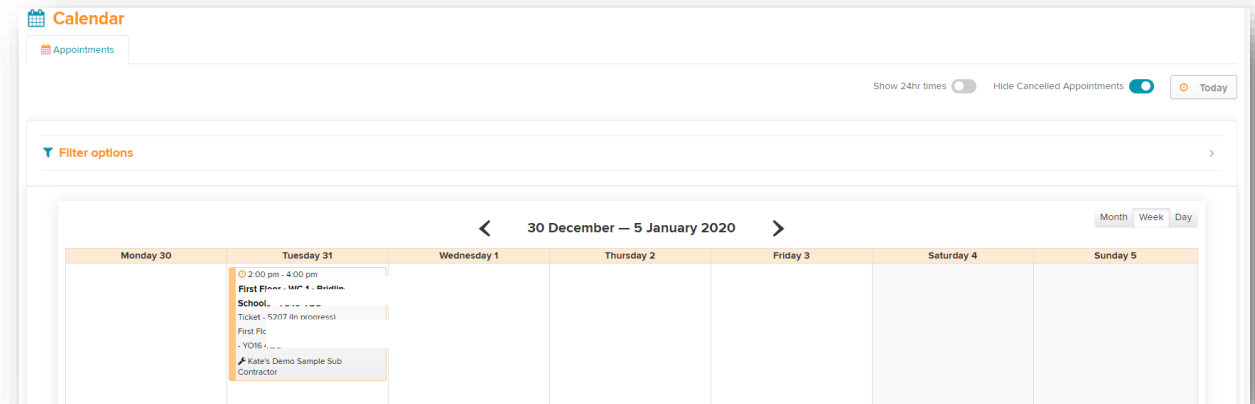
Any responses from your Principle Contractor will sit under your original query. You will also be notified via email.



The screenshot shows a web form for creating a discussion. It features a 'Title*' field with a double underline, a 'Body' field with a double underline, and a 'New Attachment*' section with a 'Browse...' button and the text 'No file selected.'. A blue 'Submit' button is located at the bottom of the form.

Calendar & Appointments

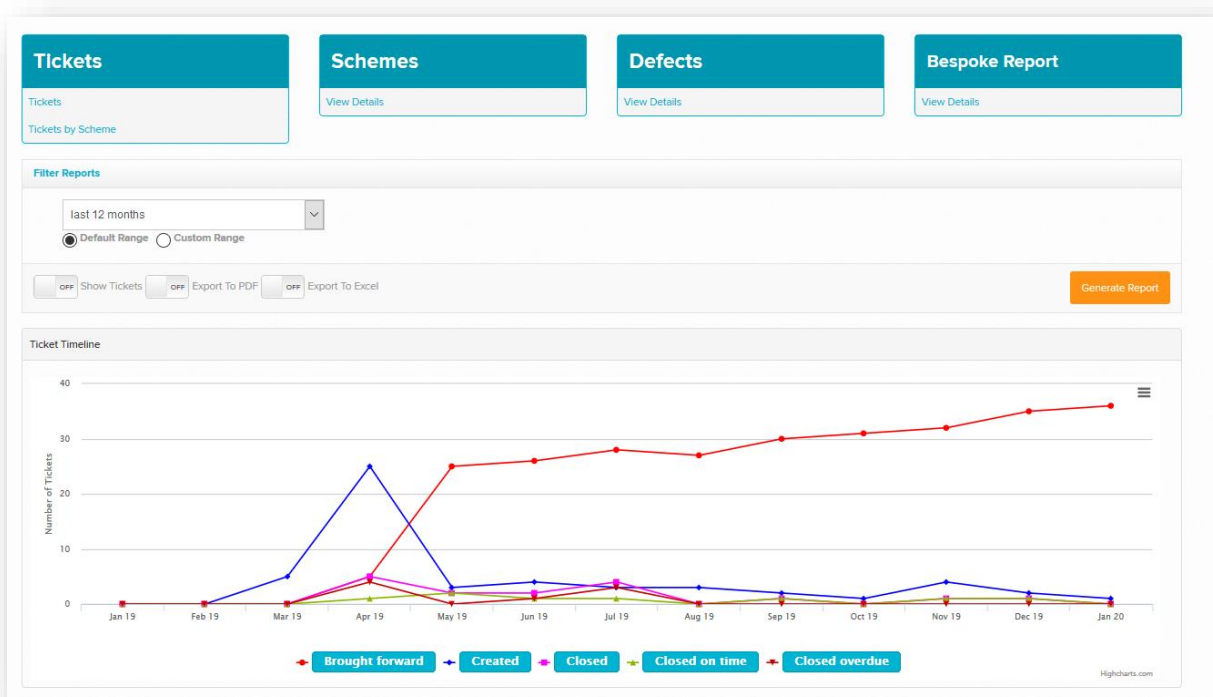
- Any Appointments created will be shown in your Calendar.
- Appointments link to a specific Ticket.
- If the Appointment is unsuitable, simply add a comment to the relevant Ticket proposing an alternative date/time.



Reporting

To create a report, click on the **Reports Tab**.
From here you can choose which report(s) you require.

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



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