



Simplifying Customer Care software for the construction industry

COMMERCIAL CLIENT USER GUIDE

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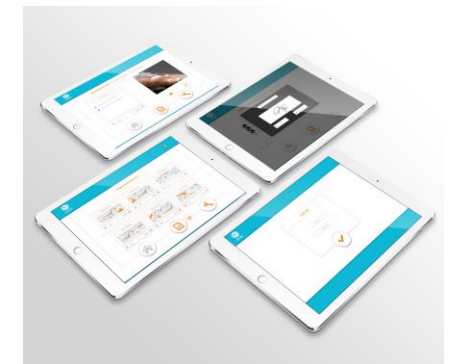
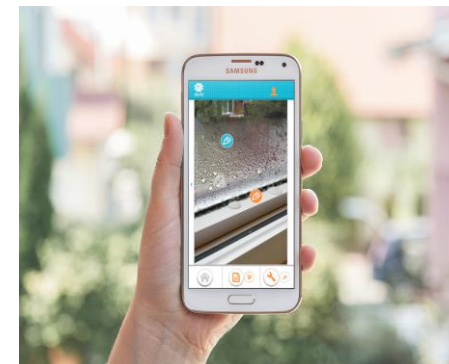


Your Client Portal

Welcome to clixifix, simple, web-based customer care software.

- ✓ Prioritise & collaborate with stakeholders
- ✓ Centralised aftercare conversations
- ✓ Quickly identify high-priority issues

**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.



Creating a Ticket

5 Steps to Creating a Ticket:

- 1. Locate project & zone/area
- 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 admin team will pick up the ticket and process it from there.

The image shows three sequential screenshots of a web form titled "New Ticket".

- Step 1:** The "Project" step is active. It contains two dropdown menus: "Choose Project" and "Choose Area / Zone". A "Next Step" button is at the bottom right.
- Step 2:** The "Defect" step is active. It contains a "Priority" dropdown (set to "Low"), "Choose Defect Category" (set to "Electrical and Electrical Heating"), and "Sub-Category" (set to "Electrical sockets") dropdowns. Below these is a "Reference Num." text field and a "Defect Description" text area containing the text "Socket in reception loose from wall". "Prev Step" and "Next Step" buttons are at the bottom.
- Step 3:** The "Supporting Documents" step is active. It features an "Add Document" section with a "Choose Files" button and the text "No file chosen". At the bottom, there are "Prev Step", "Post ticket and add new", and "Post Ticket" buttons.

Click to add images

Click to post ticket

Creating a Ticket Top Tips

- ✓ Please provide a good description of the repair or issue
- ✓ Set the priority of the defect category
- ✓ Add any additional information that will be useful for the person who will be attending the job For Example: If the Site Manager is unavailable, please contact the Assistant Site Manager (add contact details)

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 box and an arrow 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:** Bridlington Schools - YO16 4QU

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 on 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 your defect (i.e. the problem has worsened)

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

- Ticket Number:** 5207
- Status:** In progress
- Reference Num.:** (empty)
- Ticket KPI Status:** Priority: Low, Deadline: 31/01/2020 14:58, 27 days left
- Scheme:** Test Project
- Area / Zone WC 1:** Test Project - AB1 2CD
- Contact Details:** Jim Murphy, 0191 2225555
- Test Client:** dixiflix
- Address:** Test Place, Test Street, Test City, AB1 2CD
- Email Addresses:** kmurray-sub@dixiflix.co.uk

The main content area shows the ticket details:

- Defect:** Electrical and Electrical Heating
- Electrical sockets**
- Socket in reception loose from wall**
- Comments (6):** Details, Costs(0), Documents (0), Tasks (0), Appointments (1)

The comments section contains the following entries:

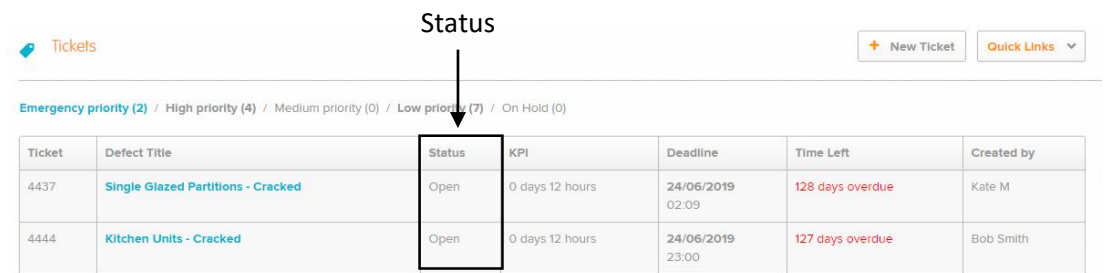
- Kate M** (19/12/2019 16:00): I have amended that for you
- Kate M** (19/12/2019 16:00): Appointment changed, see new details below: Appointment for Kate's Demo Sample Sub Contractor on 31/12/2019 14:00 Details: First Floor - WC 1 - More Information: Please refer to the Nomination instructions for more information Updated By Kate M at 19/12/2019 16:00
- Bob Smith** (19/12/2019 15:59): No, I have another meeting. Can we make it 14:00?
- Kate M** (19/12/2019 15:58): Thanks Bob, we have created an appointment for the repair. Can you advise if it is suitable for you?
- Kate M** (19/12/2019 15:57): New appointment created for Kate's Demo Sample Sub Contractor on 31/12/2019 10:00 Details: First Floor - WC 1 More Information: Please refer to the Nomination instructions for more information Created By Kate M On 19/12/2019 15:57
- Bob Smith** (19/12/2019 14:58): New Ticket Created by Bob Smith On 19/12/2019 14:58

At the bottom, there is an **Add Comment** section with a text input field.

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 interface for managing tickets. At the top, there is a 'Tickets' header with a plus icon and a 'New Ticket' button. Below the header, there is a filter bar showing 'Emergency priority (2) / High priority (4) / Medium priority (0) / Low priority (7) / On Hold (0)'. The main content is a table with the following columns: Ticket, Defect Title, Status, KPI, Deadline, Time Left, and Created by. The 'Status' column is highlighted with a black box, and an arrow points to it from the word 'Status' above. The table contains two rows of data:

Ticket	Defect Title	Status	KPI	Deadline	Time Left	Created by
4437	Single Glazed Partitions - Cracked	Open	0 days 12 hours	24/06/2019 02:09	128 days overdue	Kate M
4444	Kitchen Units - Cracked	Open	0 days 12 hours	24/06/2019 23:00	127 days overdue	Bob Smith

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”

New Inspection List

Project List Type Tenant Review

Project and Project Area/Zone

Choose Project: Test Project - Choose Area / Zone: First Floor - WC 1 - Test Project - ABI 2CD

Next Step →

New Inspection List

Project List Type Purchaser Review

List Type: Snagging

Choose the list type from the drop down

Prev Step ← Next Step →

New Inspection List

Project List Type Tenant Review

Project and Project Area / Zone

Project: Test Project - Area / Zone: First Floor - WC 1 - Test Project - ABI 2CD

List Type: Snagging

Reference Num.

Contact Details

Full Name: John Smith

Home Phone Number: Mobile Number: 0777777777

Other Comments

Supporting Documents

Add Document: No file chosen

Choose Files

Prev Step ← Post Inspection List →

Unique Reference Number: 1147

Snagging Inspection List

Status: pending

Reference Num.: 1147

Scheme: Test Project

Area / Zone: WC 1

Contact Details: John Smith

Item	Defect Title	Image	Status	Actions
				+ Defect

Click “+ Defect” to add an Image of the Defect

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.

The screenshot shows the 'Snagging Inspection List' interface. On the left, a sidebar displays details for Inspection List 1147, including its status (pending), reference number, scheme (Test Project), area (Zone WC 1), and contact details (John Smith). An arrow points to the '1147' number with the label 'Unique Reference Number'. The main area shows a 'Choose Defect Category' dropdown set to 'Electrical and Electrical Heating' and a 'Sub-Category' dropdown set to 'Electrical sockets'. Below these is a 'Defect Description' text box containing 'Socket loose in hallway', with an arrow pointing to it and the instruction 'Be as descriptive as possible'. A 'Save Defect' button is highlighted with an arrow and the label 'Click "Save Defect"'. At the bottom, a 'Submit this Inspection List' button is highlighted with an arrow and the label 'Click to Submit Inspection List if you have captured all defects'. The right side of the interface shows a table of defects with columns for Item, Defect Title, Image, Status, and Actions. Two defects are listed: 'Plumbing & Heating Systems - Boiler failure' and 'Electrical and Electrical Heating - Electrical sockets', both with an 'Open' status.

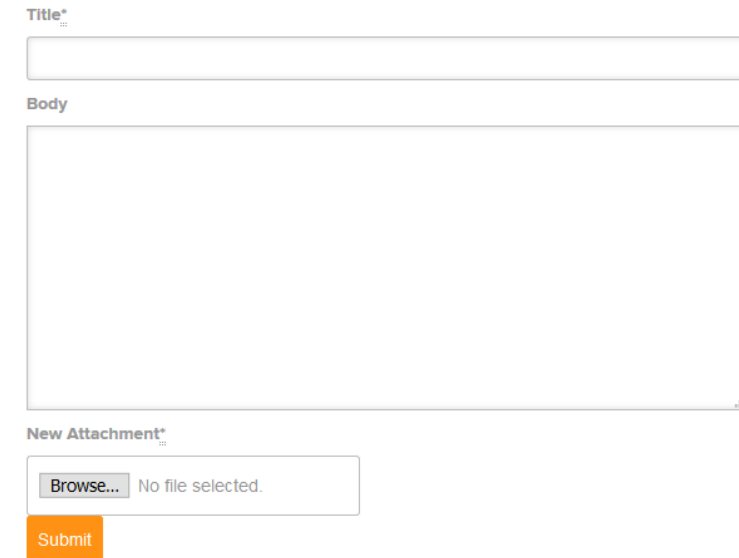
You may have a general enquiry about the project.

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. O&M Manual)
2. Detail (e.g. Do you have an O&M manual for the thermostat controls?)
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.

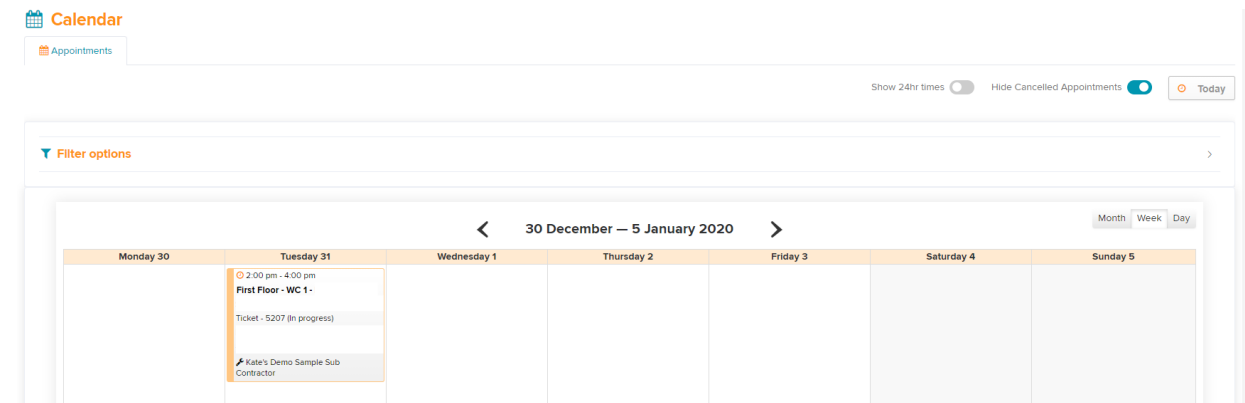



The screenshot shows a web form for creating a discussion. It consists of the following elements:

- Title***: A text input field with a small asterisk and a double underline indicating it is required.
- Body**: A large text area for entering the details of the discussion.
- New Attachment***: A section for adding files, featuring a "Browse..." button and the text "No file selected."
- Submit**: An orange button to submit the discussion.

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



We have a comprehensive Help & Support suite, accessible from the  in the top right-hand corner of your account.

Enter your question in the search bar or browse the many written and video resources at your disposal.

You can create Support Ticket for any specific queries. Simply click “New support ticket” in the top right-hand corner to be directed to the “Submit a ticket” page.







We also have a Chat facility, in the bottom left-hand of the page, click on the speech bubble icon to bring up the chat. The chat is managed by our Success Team in business hours (Mon-Thurs 9-5, Fri 9-4).

Submit a ticket


Requester *

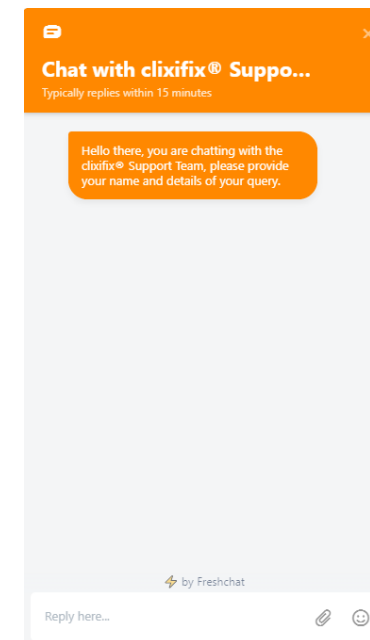
Subject *

Description *

B *I* U      

+ Attach a file

I'm not a robot 
reCAPTCHA
Privacy - Terms



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