



Simplifying Customer Care software for the construction industry

RESIDENTS USER GUIDE

Contents

Your Portal	3
Home	4
What is a Ticket?	5
Creating a Ticket	6
Comments	7
Ticket Status	8
Discussions	9
Appointments	10



Your Portal

clifix® enables you to centralise all your conversations with your developer.

Your Portal allows you to:

- Log defects by creating a Ticket
- Communicate with your developer directly
- Add a comment which is time and date stamped
- Track the progress of your ticket
- View all confirmed Appointments

Your Portal may include the following:

- Appliance Guides & important Handover Documents
- Useful information (meter information, choices, etc.)
- Information about your housebuilder and their customer care charter
- Full details of your warranty provider



Overview

Your 'Overview' dashboard contains all the resources your housebuilder has pre-populated for you to help you with your new home.

- ✓ Plot(s) Information
- ✓ Ticket Summary
- ✓ Adding Ticket Shortcut
- ✓ Comments

The screenshot shows the 'Overview' dashboard for a user named 'MR HOMEOWNER'. The dashboard includes a navigation bar with icons for Overview, Tickets, Appointments, Inspection Lists, Documents, and Discussions. Below the navigation bar, there is a 'Plots' section with a search bar and a list of three plots: '1 apartment' (Scheme: 454), '12 The Meadows' (Scheme: 212), and '4 Newbiggin-by-the-Sea, Northumberland, NE64 6DP' (Scheme: 127). To the right of the plots is a 'Ticket Summary' section with a '+ NEW TICKET' button and a list of ticket statuses: 'OPEN' (33), 'CLOSED' (9), 'IN PROGRESS' (18), 'ON HOLD' (3), and 'ABORTIVE VISIT' (1). Below the ticket summary is a 'VIEW ALL' link. To the right of the ticket summary is a 'Comments' section with a list of comments from 'Our Operative(Test House Builder)' and 'Mr Homeowner (Plot Contact)'. The comments include messages like 'Good afternoon Mr Homeowner, Thank you for your ticket. We have arranged for one of our operatives to visit your...' and 'New Ticket Created by Mr Homeowner On 24/07/2020 14:01'.

What is a Ticket?

A Ticket is a quick and simple way to notify your housebuilder of any defects you are experiencing in your new home.

Tickets Tab

This section displays all Tickets relating to your property.

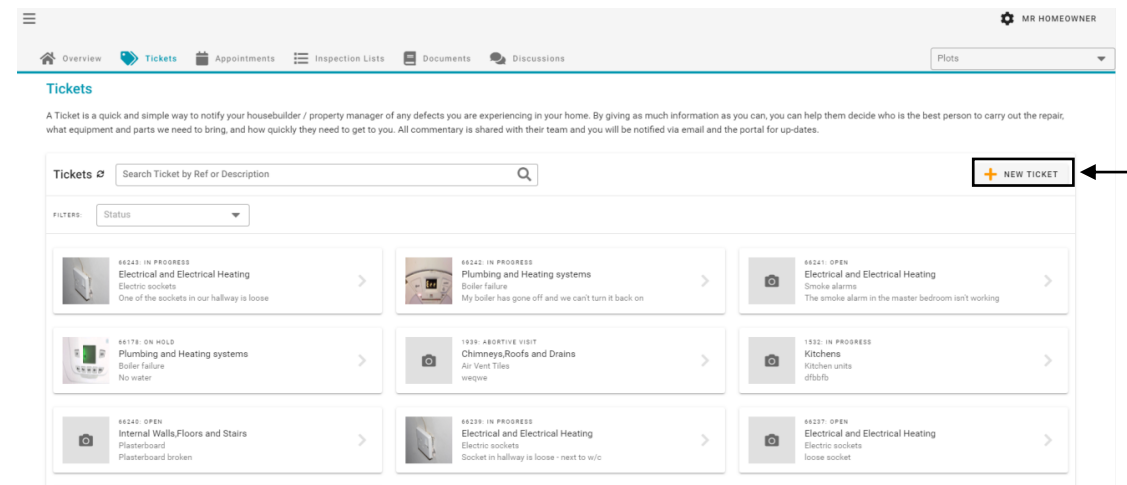
The screenshot shows a web application interface for a homeowner. At the top, there is a navigation bar with icons for Overview, Tickets, Appointments, Inspection Lists, Documents, and Discussions. The 'Tickets' tab is selected. Below the navigation bar, there is a header for 'Tickets' with a search bar and a 'NEW TICKET' button. A filter dropdown is set to 'Status'. The main content area displays a grid of nine ticket cards, each with a small image, a status indicator, a category, and a description of the defect.

Ref	Status	Category	Description
66243	IN PROGRESS	Electrical and Electrical Heating	Electric sockets One of the sockets in our hallway is loose
66242	IN PROGRESS	Plumbing and Heating systems	Boiler failure My boiler has gone off and we can't turn it back on
66241	OPEN	Electrical and Electrical Heating	Smoke alarms The smoke alarm in the master bedroom isn't working
66178	ON HOLD	Plumbing and Heating systems	Boiler failure No water
1939	ABORTIVE VISIT	Chimneys, Roofs and Drains	Air Vent Tiles weqwe
1532	IN PROGRESS	Kitchens	Kitchen units dfbfbf
66240	OPEN	Internal Walls, Floors and Stairs	Plasterboard Plasterboard broken
66239	IN PROGRESS	Electrical and Electrical Heating	Electric sockets Socket in hallway is loose - next to w/c
66237	OPEN	Electrical and Electrical Heating	Electric sockets loose socket

Creating a Ticket

3 Steps to Creating a Ticket:

1. New Ticket (one defect per ticket)
2. Defect Type & Sub-category (with detailed description)
3. Other Comments (access information etc.)



MR HOMEOWNER










Overview Tickets Appointments Inspection Lists Documents Discussions Plots

Tickets

A Ticket is a quick and simple way to notify your housebuilder / property manager of any defects you are experiencing in your home. By giving as much information as you can, you can help them decide who is the best person to carry out the repair, what equipment and parts we need to bring, and how quickly they need to get to you. All commentary is shared with their team and you will be notified via email and the portal for up-dates.

Tickets Search Ticket by Ref or Description

FILTERS: Status

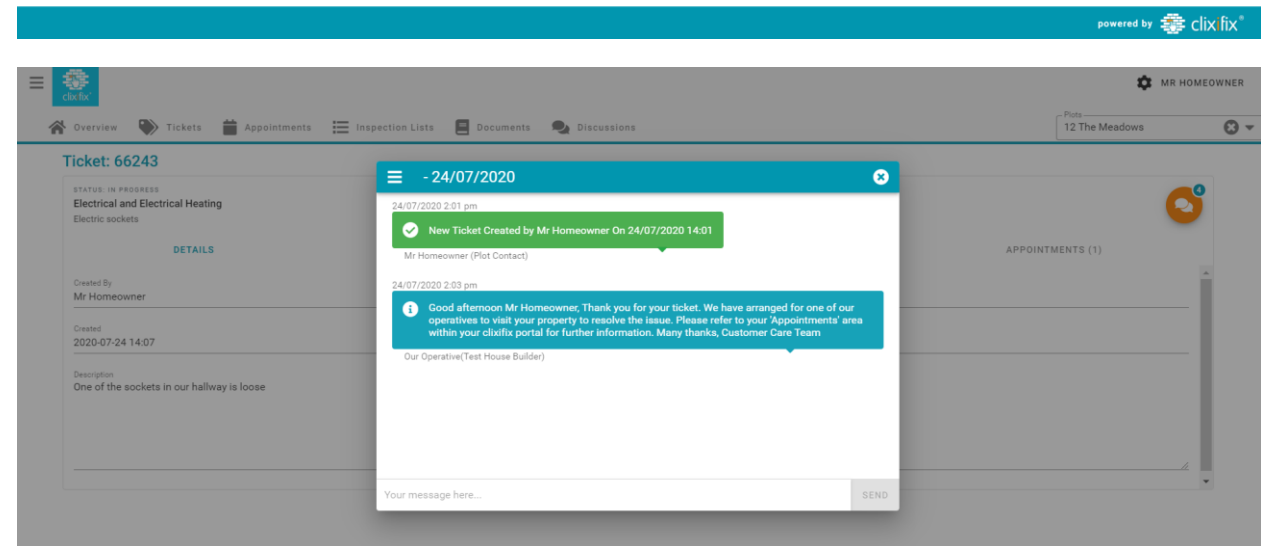
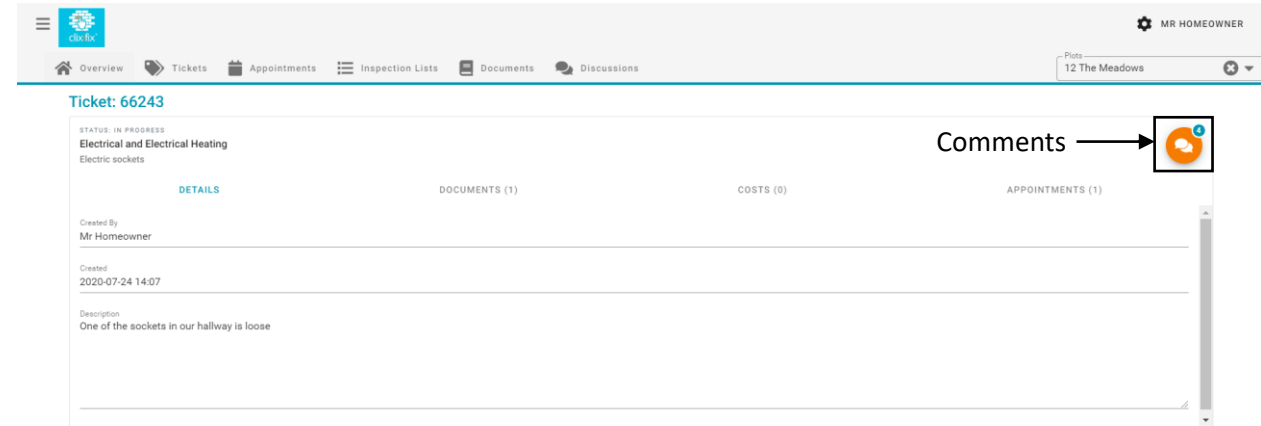
 66243: IN PROGRESS Electrical and Electrical Heating Electric sockets One of the sockets in our hallway is loose	 66242: IN PROGRESS Plumbing and Heating systems Boiler failure My boiler has gone off and we can't turn it back on	 66241: OPEN Electrical and Electrical Heating Smoke alarms The smoke alarm in the master bedroom isn't working
 66178: ON HOLD Plumbing and Heating systems Boiler failure No water	 1939: ABORTIVE VISIT Chimneys, Roofs and Drains Air Vent Tiles weqwe	 1532: IN PROGRESS Kitchens Kitchen units dfbdfb
 66240: OPEN Internal Walls, Floors and Stairs Plasterboard Plasterboard broken	 66239: IN PROGRESS Electrical and Electrical Heating Electric sockets Socket in hallway is loose - next to w/c	 66237: OPEN Electrical and Electrical Heating Electric sockets loose socket

Comments

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

Simply Add a Comment to:

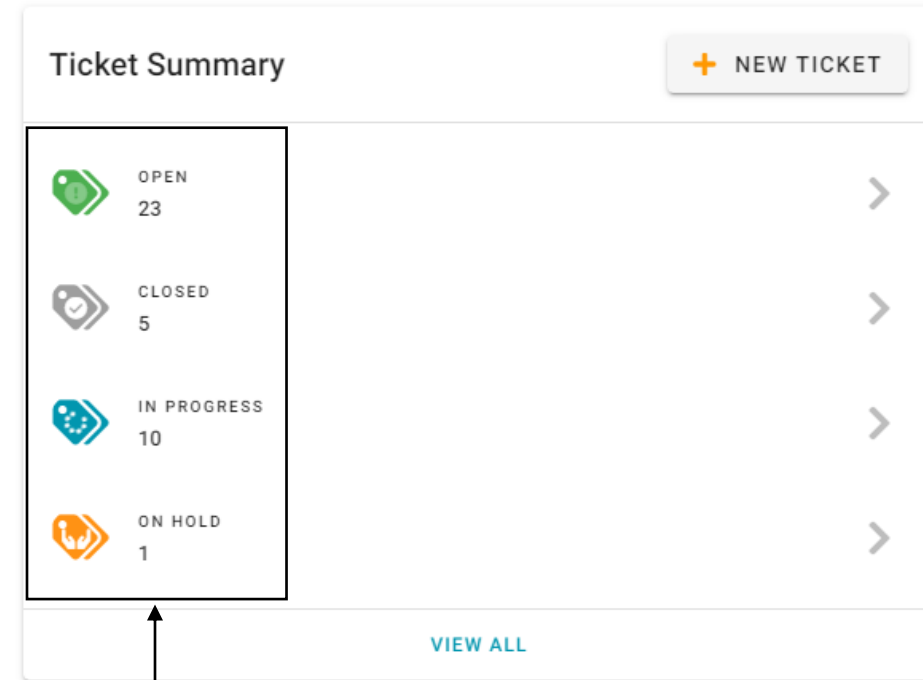
- Liaise with your housebuilder regarding appointments
- Request an update
- Inform your housebuilder of any changes to your defect (i.e. the problem has worsened)



Ticket Status

There are 4 possible Status levels for Tickets:

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



Discussions

You may have a general enquiry about your new home.

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

How to create a Discussion:

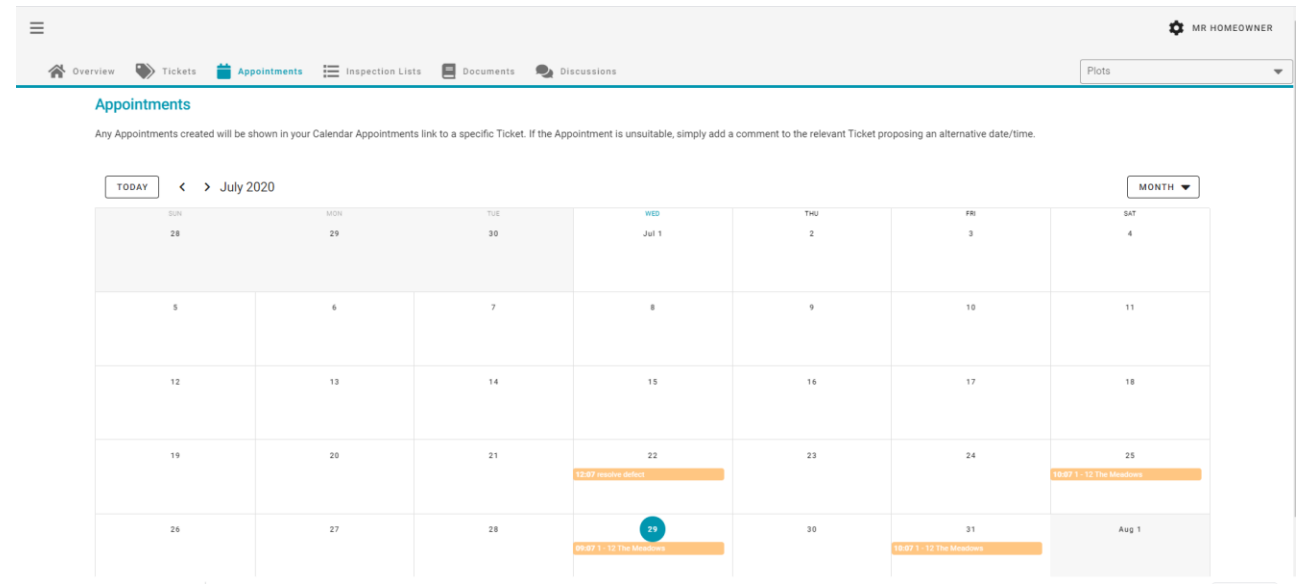
1. Title (e.g. Paint Query)
2. Detail (e.g. what is the colour of my living room paint?)
3. Add file (if applicable)
4. Submit

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

The screenshot shows the 'Discussions' section of a user interface. The top navigation bar includes 'Overview', 'Tickets', 'Appointments', 'Inspection Lists', 'Documents', and 'Discussions'. The 'Discussions' menu item is highlighted with a box and an arrow. Below the navigation, the 'Discussions' section is titled 'Discussions' and includes a '+ NEW DISCUSSION' button. A sample discussion card is shown with a date '2021-06-23 18:04', a title 'A title clarifx', and a body 'test'. Below the card is a pagination control showing '1'. A 'Create Discussion' form is also visible, featuring a 'Plots' dropdown menu with '12 The Meadows' selected, a 'Title' field, a 'Body' text area, and a 'SUBMIT' button.

Appointments

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



clixifix[®]