



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



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 house-builder 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 interface. At the top, there is a navigation bar with icons for Overview, Tickets, Appointments, Inspection Lists, Documents, and Discussions. The user is identified as 'MR HOMEOWNER'. Below the navigation bar, the 'Overview' section contains a welcome message and a link to report issues. The main content area is divided into three panels: 'Plots', 'Ticket Summary', and 'Comments'. The 'Plots' panel lists three plots with their respective schemes. The 'Ticket Summary' panel shows a breakdown of tickets by status: OPEN (33), CLOSED (9), IN PROGRESS (18), ON HOLD (3), and ABORTIVE VISIT (1). The 'Comments' panel displays a list of recent comments from 'Our Operative' and 'Mr Homeowner'.

**Plots**

Plot ID	Plot Name	Scheme
19212	1 apartment	454
19218	12 The Meadows	212
241	4 Newbiggin-by-the-Sea, Northumberland, NE64 6DP	127

**Ticket Summary**

Status	Count
OPEN	33
CLOSED	9
IN PROGRESS	18
ON HOLD	3
ABORTIVE VISIT	1

**Comments**

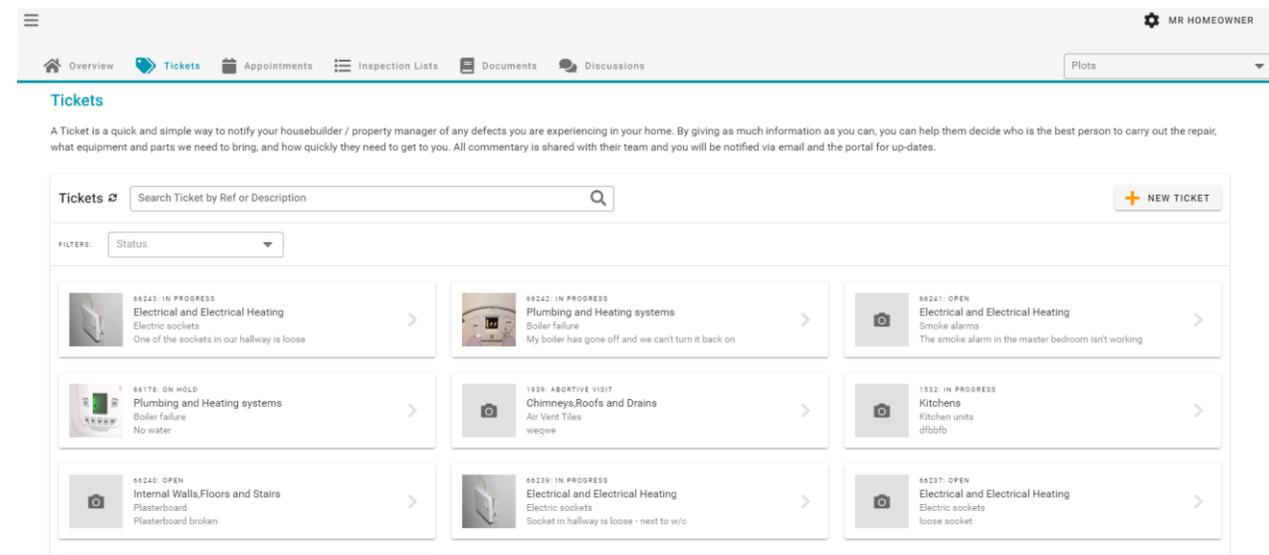
Date/Time	Author	Message
2020-07-24 14:07	Our Operative (Test House Builder)	Good afternoon Mr Homeowner, Thank you for your ticket. We have arranged for one of our operatives to visit your...
2020-07-24 14:07	Mr Homeowner (Plot Contact)	New Ticket Created by Mr Homeowner On 24/07/2020 14:01
2020-07-24 13:07	Our Operative (Test House Builder)	Good afternoon Mr Homeowner, Thank you for sending us your ticket. We have arranged for one of our operatives to...
2020-07-24 13:07	Our Operative (Test House Builder)	Good afternoon Mr Homeowner, Thank you for sending us your ticket. We have arranged for one of our operatives to...
2020-07-24 13:07	Mr Homeowner (Plot Contact)	New Ticket Created by Mr Homeowner On 24/07/2020 13:54

# 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 the 'Tickets' section, followed by a brief explanation: '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.'

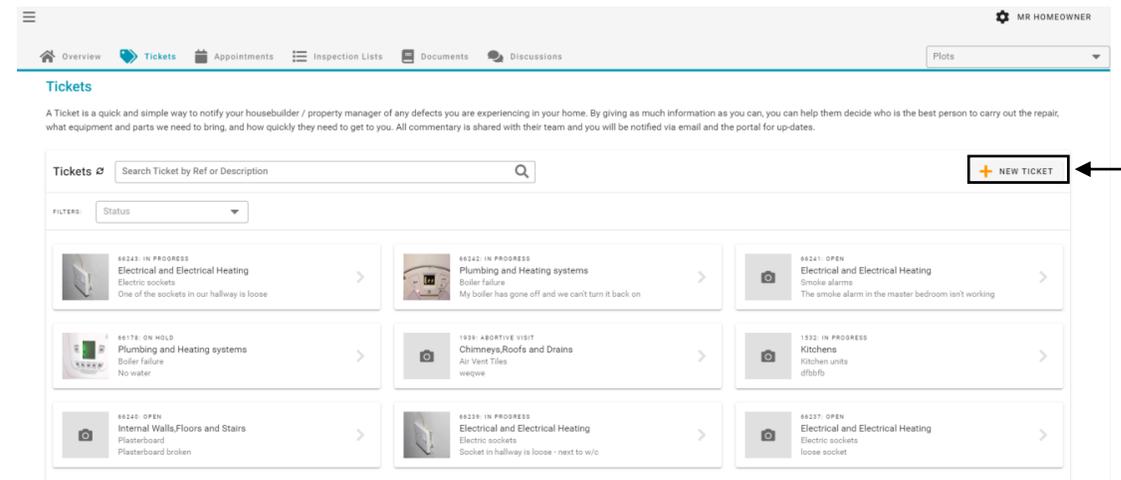
Below the header, there is a search bar labeled 'Search Ticket by Ref or Description' and a '+ NEW TICKET' button. A filter dropdown menu is set to 'Status'. The main content area displays a grid of nine ticket cards, each with a small image icon, a status indicator, a category, and a description:

- 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.)



The screenshot shows a web application interface for managing tickets. At the top, there is a navigation bar with icons for Overview, Tickets, Appointments, Inspection Lists, Documents, and Discussions. The user is logged in as 'MR HOMEOWNER'. Below the navigation bar, there is a 'Tickets' section with a search bar and a '+ NEW TICKET' button highlighted with a red box and an arrow. The main content area displays a grid of ticket cards, each with a status, category, and description.

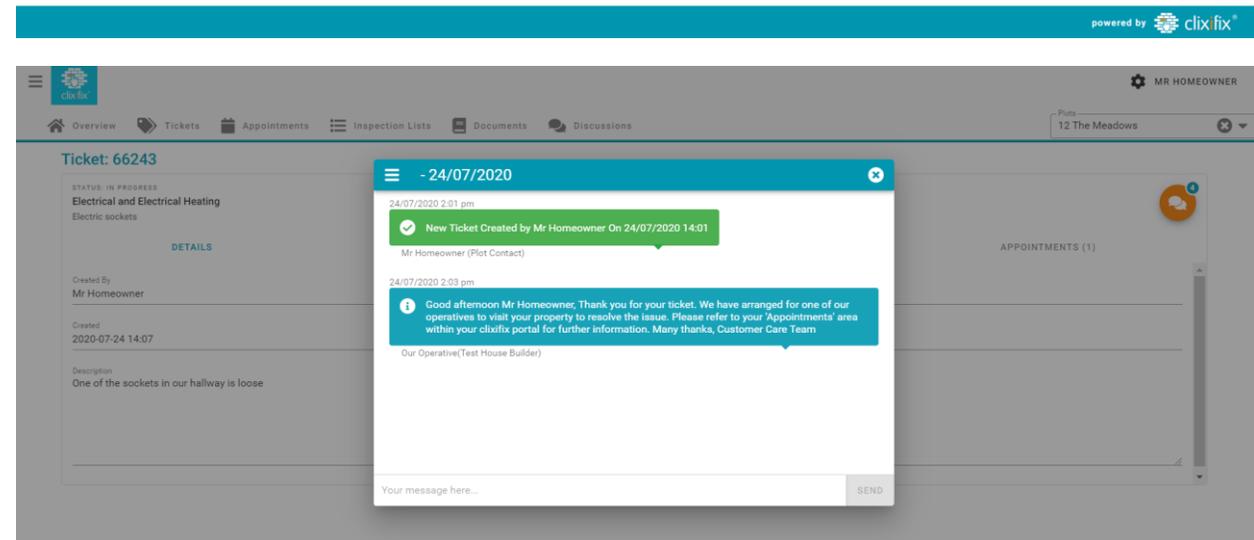
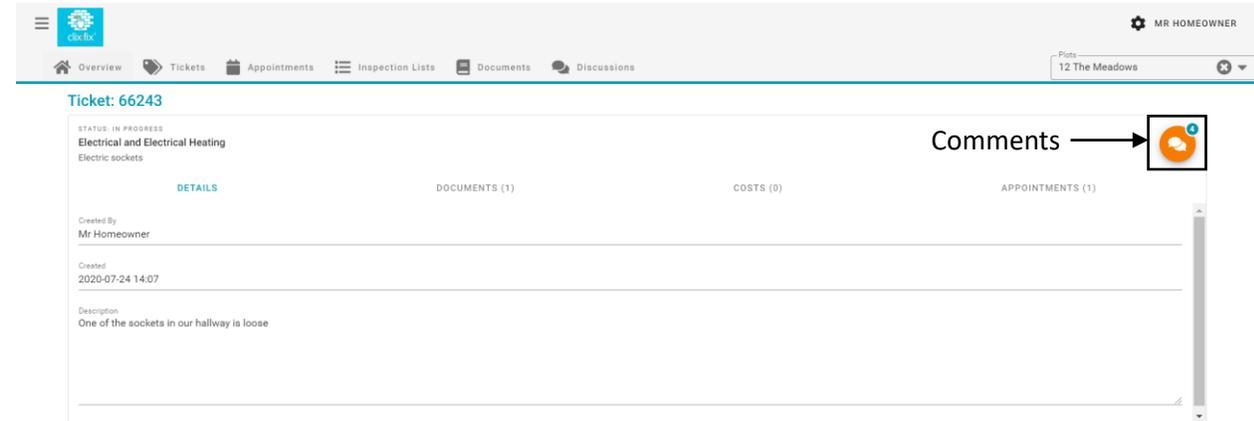
Status	Category	Description
IN PROGRESS	Electrical and Electrical Heating	Electric sockets One of the sockets in our hallway is loose
IN PROGRESS	Plumbing and Heating systems	Boiler failure My boiler has gone off and we can't turn it back on
OPEN	Electrical and Electrical Heating	Smoke alarms The smoke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

The screenshot shows a 'Ticket Summary' dashboard. At the top right is a '+ NEW TICKET' button. Below it is a list of four ticket status categories, each with an icon, a status name, and a count. The categories are: OPEN (23), CLOSED (5), IN PROGRESS (10), and ON HOLD (1). Each category has a right-pointing chevron icon. At the bottom right of the list is a 'VIEW ALL' link. A black box highlights the list of categories, and an arrow points from the word 'Status' below to the bottom of this box.

Status	Count
OPEN	23
CLOSED	5
IN PROGRESS	10
ON HOLD	1

Status

# 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:

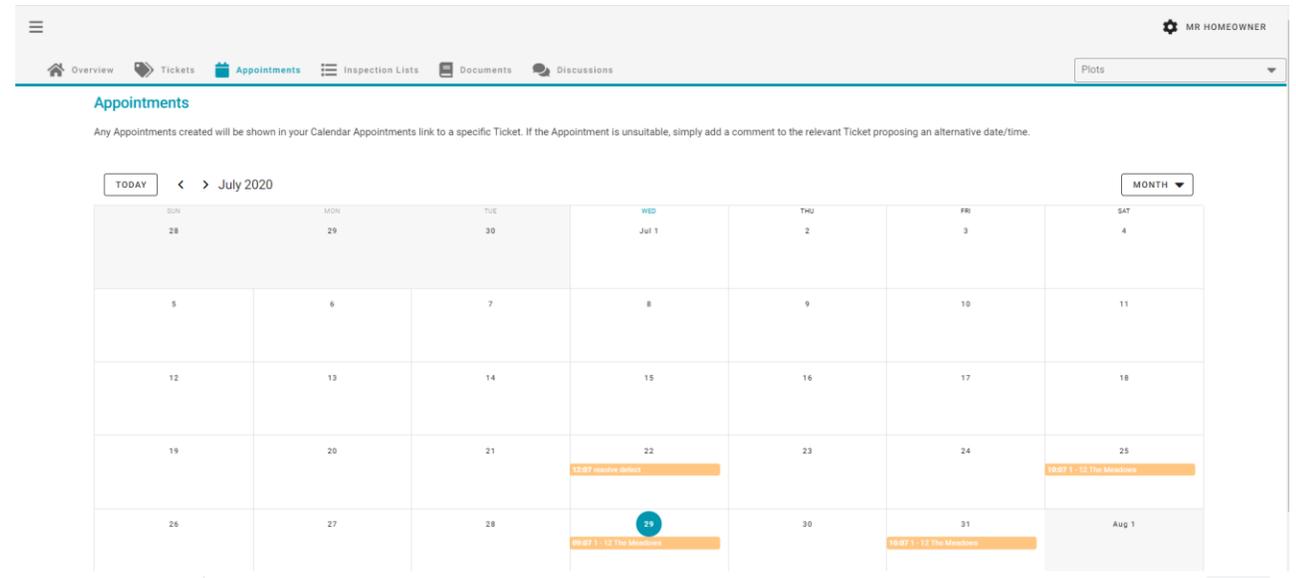
1. Title (e.g. Paint Query)
2. Detail (e.g. what is the colour of my living room paint?)
3. Add file (if applicable)
4. Submit

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' tab is active and highlighted with a box and an arrow. Below the navigation bar, the 'Discussions' section is titled 'Discussions' and includes a '+ NEW DISCUSSION' button. A list of discussions is shown, with one entry titled 'A title clarifx test' dated '2021-06-23 18:04'. Below the list, there is a 'Create Discussion' form with a dropdown menu for 'Plots' (selected '12 The Meadows'), a 'Title' field (0 / 255 characters), 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



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