



Fixflo Essentials and Professional User Guide

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How to log an issue via Fixflo

Occupiers have the ability to report repair and maintenance requests online via your Fixflo site. Each agency and brand will have its own unique Fixflo site.

Each agency's URL will look similar to this > [youragency.fixflo.com](#). A good example of this would be [cslettings.fixflo.com](#).

English (UK) polski español 中文(简体) 旧版

Log in Get password

Fixflo

Welcome to our repair reporting system. Please be as descriptive as possible and always provide a photo of the problem when you can.

1 What is the problem?

Please click on the relevant picture

What is the issue?

 Bathroom and Toilet	 Kitchen	 Heating and boiler	 Water and Leaks	 Doors, Garages and Locks	 Internal floors, walls and ceilings
 Lighting	 Window	 Exterior and Garden	 Laundry	 Furniture	 Electricity
 Hot Water	 Alarms and Smoke Detectors	 Pests/Vermin	 Roof	 Communal/Shared Facilities	 Audiovisual

You will need to go to [youragency.fixflo.com](#) to actually log in to your Fixflo account. You can log in by going to the top right corner of the page clicking 'Log in'. If you also forget your password you can click on 'Get Password' where you will receive an email allowing you to change your password

Benefits of reporting via Fixflo include:

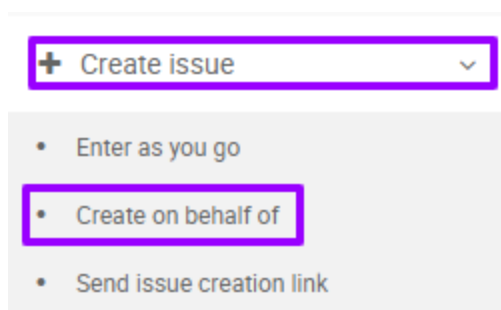
- Ability to translate the interface in over 40 different languages
- Capturing of detailed information about issues
- Guidance and advice pop-ups help occupiers to self-resolve issues
- An automatic email is sent to the reporting occupier with all details/confirmation of submission

Once an issue has been reported by an occupier, it will appear on your agent's Fixflo dashboard, depending on their settings, making it easy to review any new maintenance requests before assigning to the relevant agent.

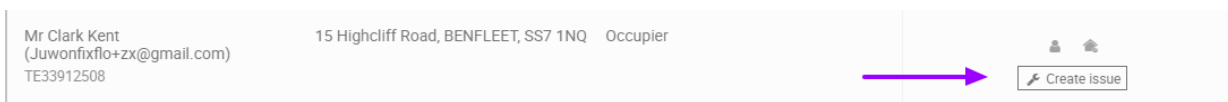
Logging calls and emails as issues on your Fixflo system

If a repair request is reported to you via the phone or email, you will need to log that request onto Fixflo.

1. Firstly go to '**Create Issue**' > **Create on behalf of** from the main left-hand menu.



2. You can then enter the name or email address of the tenant and find the corresponding user profile and property address.



3. If you click on '**Create Issue**' you will be taken to the reporting site within your Fixflo account to report the repair request.

Report an issue

1 What is the problem?

Please click on the relevant picture

What is the issue?

Bathroom and Toilet

Kitchen

Heating and boiler

Water and Leaks

Doors, Garages and Locks

Internal floors, walls and ceilings

Lighting

Planned works

Window

Exterior and Garden

Laundry

Furniture

- Walk through the pictures and fill in all relevant details or use the search bar to quickly find what you are looking for.

Report an issue

1 What is the problem?

Please click on the relevant picture

damp

Internal floors, walls and ceilings > Walls > Mould appearing > In a damp/humid room such as a bathroom or kitchen
Internal floors, walls and ceilings > Ceiling > Mould appearing > In a damp/humid room such as a bathroom or kitchen
Internal floors, walls and ceilings > Walls > Damp patches appearing
Internal floors, walls and ceilings > Ceiling > Damp patches appearing
Internal floors, walls and ceilings > Walls > Damp patches appearing > At ground floor level with brown "tide mark"
Internal floors, walls and ceilings > Walls > Damp patches appearing > At ground floor level with no brown "tide mark"
Internal floors, walls and ceilings > Walls > Damp patches appearing > Above ground floor level and you think that it is related to a leak
Internal floors, walls and ceilings > Walls > Damp patches appearing > Above ground floor level and you do not think it is related to a leak

Bathroom and Toilet

Kitchen

Heating and boiler

Water and Leaks

Doors, Garages and Locks

Internal floors, walls and ceilings

Lighting

Planned works

Window

Exterior and Garden

Laundry


Furniture

5. In case an occupier has forwarded you a picture, you can also upload it so it's logged against the issue.

2 Add photos

Please add up to 10 photos, video or audio files (max: 30mb each) to help explain the problem.

Upload file(s)


Click to upload

[Back](#) [Next](#)

6. The address and contact details should be auto-populated.

3 Address details

Address

Fixflo House

9 Larcom Street

Town

LONDON

Postcode

SE171RT

[Search by address](#)

[Back](#) [Next](#)

4 The occupier's contact details

Report without an associated occupier

☐ Yes ☒ No

Title

Mr

First name

Clark

Surname

Kent

Email address *

Juwonfixflo+zx@gmail.com

Telephone number *

12345678910

Telephone number (alt.)

Tenancy Reference Number

[Back](#) [Next](#)

- Lastly, you would need to ensure whether the occupier would like to be present or not present when the contractor goes onsite and if necessary any details on pets, alarm or parking restrictions.


☒ Occupier presence not required - you do not need to enter the property or you already have authority to enter the property
OR
☐ Occupier presence required - the contractor will be asked to arrange access with the occupier

Pet information
*If there are pets in the property, please provide details

Alarm information
*If there are alarms in the property, please provide details

Parking restrictions
*If there are parking restrictions near the property, please provide details

Whilst on the last section of this page, if you have changed your settings to include Covid-19 questions you will need to answer them. **Please note:** all the Covid questions require an answer before the maintenance and repair request is logged.



Does anyone in your household have any symptoms of coronavirus?
The symptoms being a new continuous cough and/or high temperature. [Click here for more information](#)

☐ Yes ☐ No

Is anyone in your household being tested for coronavirus?

☐ Yes ☐ No

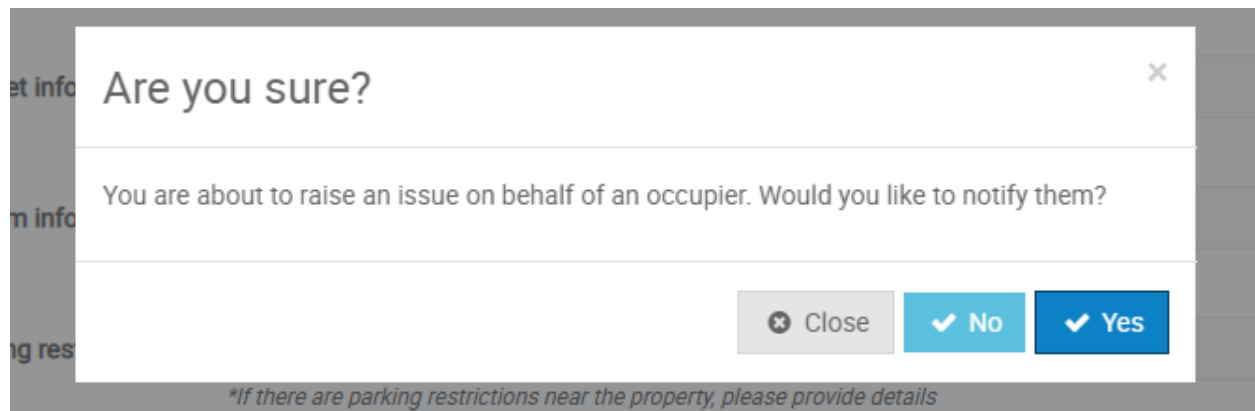
Is anyone in your household self-isolating due to potential coronavirus infection?

☐ Yes ☐ No

Has anyone in your household been in contact with someone who has tested positive for coronavirus, within the last 14 days?

☐ Yes ☐ No

- You can then submit the issue and ensure that you tick 'Yes' to notifying the occupier that you have reported the issue on their behalf.

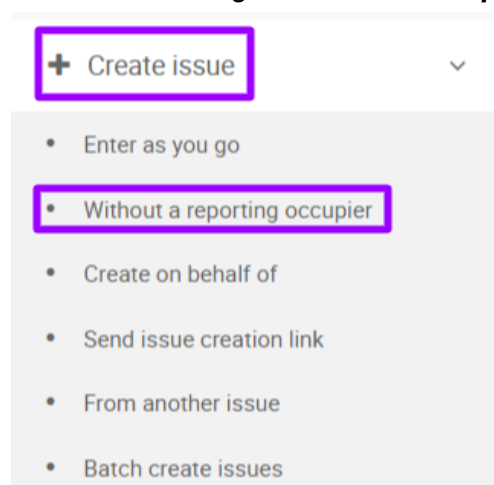


Reporting an issue with no occupier

There may be some cases where you need to raise an issue but not have it linked to an occupier, for example, one of your contractors notices something when they are onsite and alerts you to the issue or a property is currently void.

To handle these issues you will need to go to the create issue section on the left-hand side

1. Click on '**Create Issue**' and from here go to '**Without a reporting occupier**'



2. Next, you will be taken to a fault tree similar to the one an occupier would go to report their issue

Report an issue

1 What is the problem?

Please click on the relevant picture

Bathroom and Toilet

Kitchen

Heating and boiler

Water and Leaks

Doors, Garages and Locks

Internal floors, walls and ceilings

Lighting

Planned works

Window

Exterior and Garden

Laundry

Furniture

- After this is done you will need to enter the property address you wish to raise the issue against. In the occupier's contact details section, you will be asked whether or not you would like to add a reporting occupier.

Report an issue

1 What is the problem?

2 Add photos

3 Address details

4 The occupier's contact details

Report without an associated occupier

☒ Yes
☐ No

No reporting occupier

You are about to raise an issue against a property without a reporting occupier

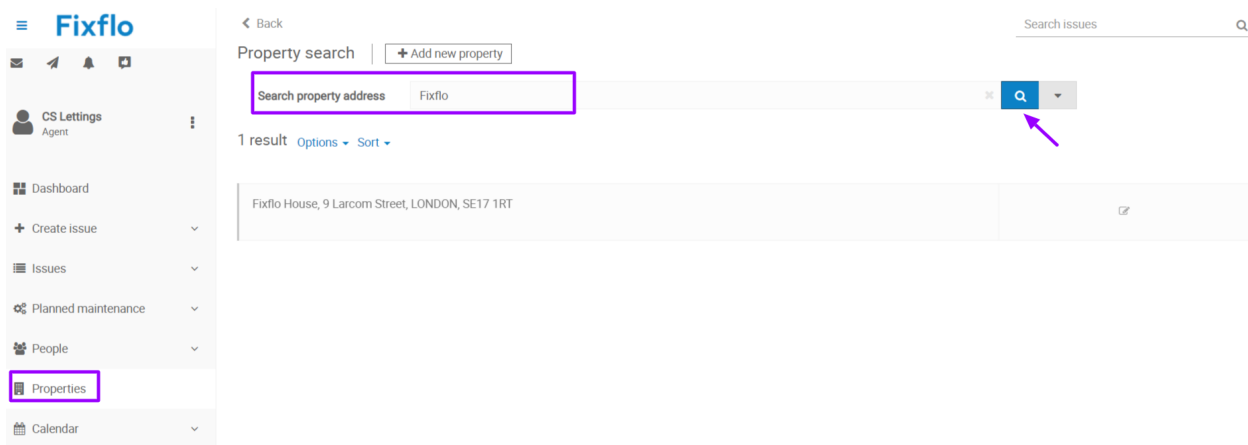
Back

Next

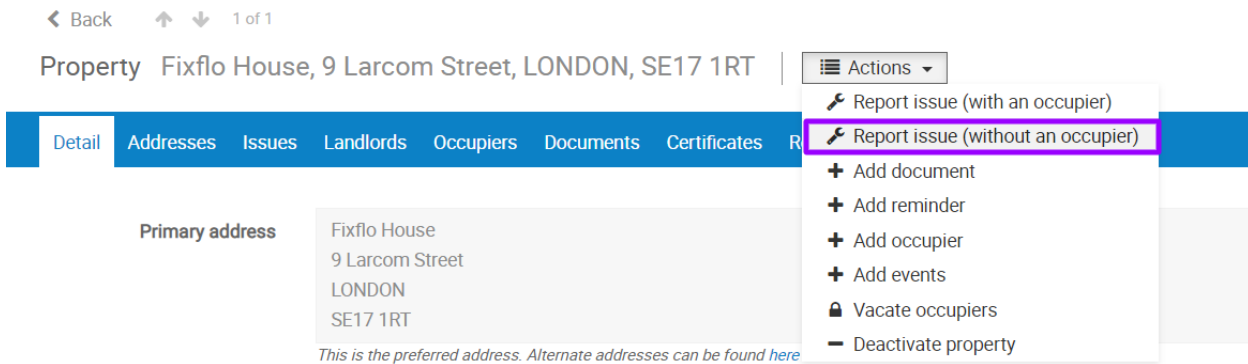
5 Confirm and send

Alternatively, you can log an issue against a property.

- Click on '**Properties**' and search for the relevant address via the search



- You can then click on the **'Actions'** button where you can choose the option **"Report issue (without an occupier)"**.



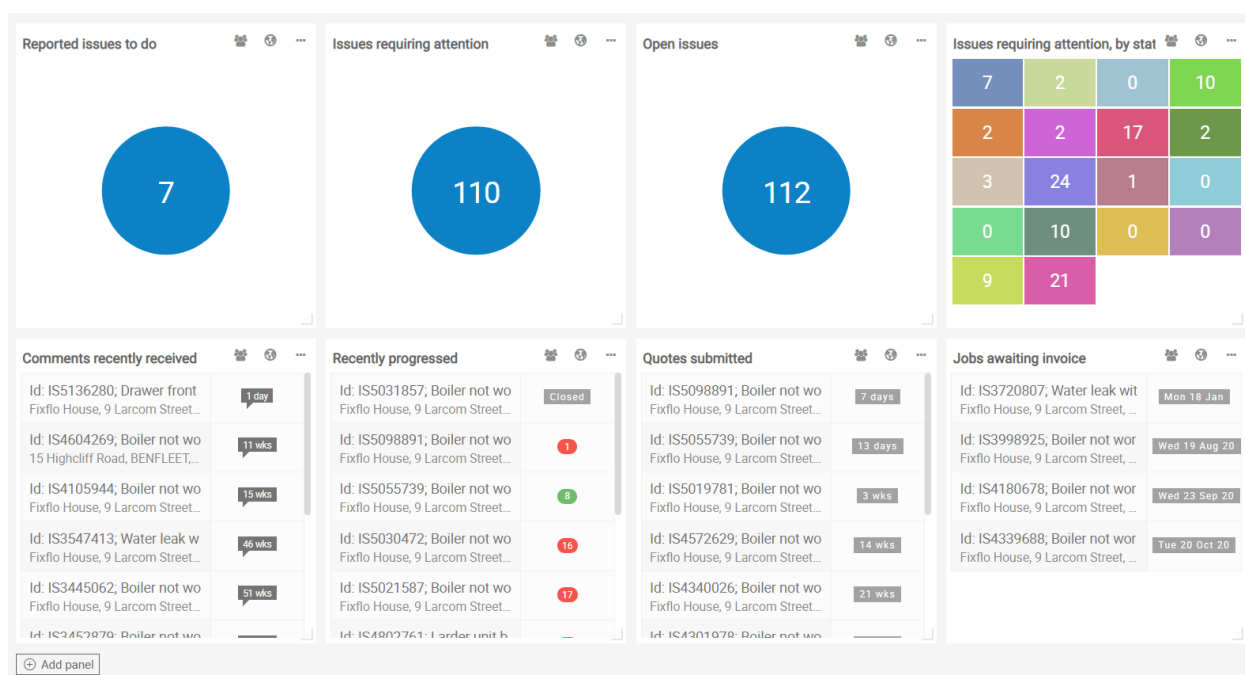
- Walkthrough the reporting page as above and log the issue. It will not ask for any occupier details and auto-populate with the right property details.

The Fixflo Dashboard

The Dashboard is a key feature of the Fixflo Professional and Fixflo Essential systems. It allows you to have full visibility of all of your issues on the system, from the moment they have been raised until they are ready to be closed.

Each agent who has their own login has access to their very own Dashboard and can customise this to view what they would like to see. All panels are interactive and can be clicked into which will either take you to an issue or to a list of your issues.

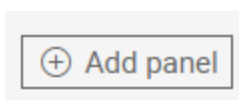
The Dashboard is made up of 8 panels and they are easily customised. The default Dashboard looks like this:



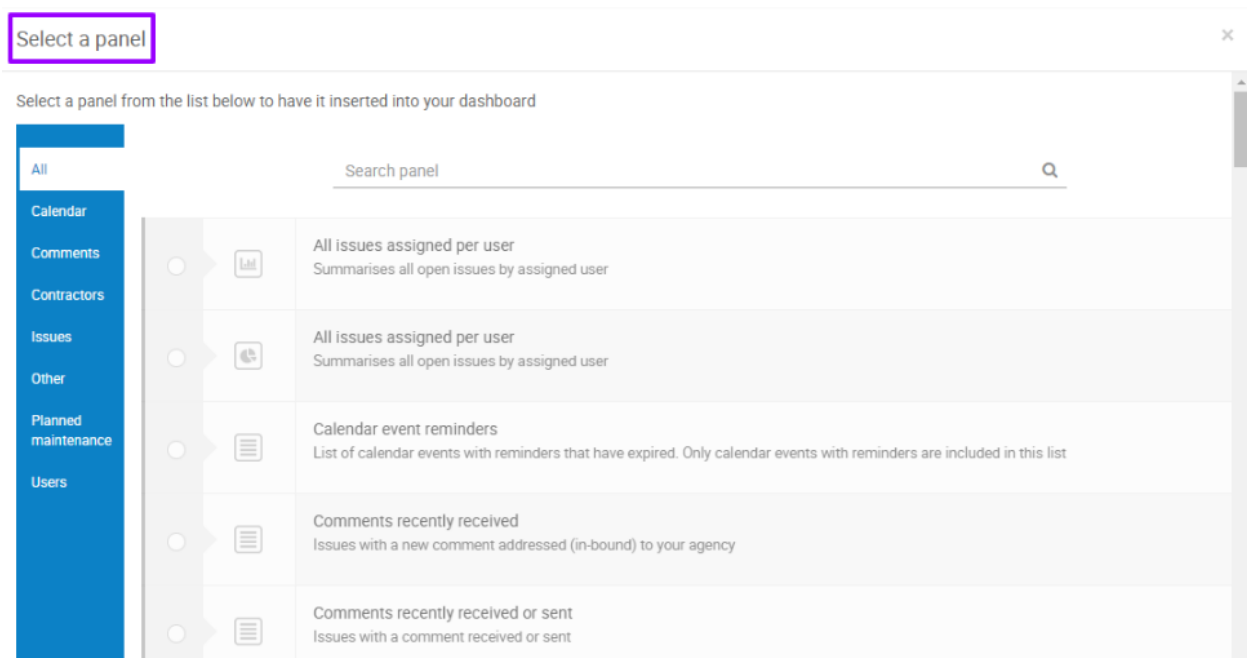
You can customise your dashboard by either adding new panels, removing panels you no longer find useful, filtering the results of a panel or by selecting a different design for your panel that you may understand better.

Customising your Dashboard

To add a new a panel on the Dashboard, you will need to go to the add panel button at the bottom of your Dashboard screen:

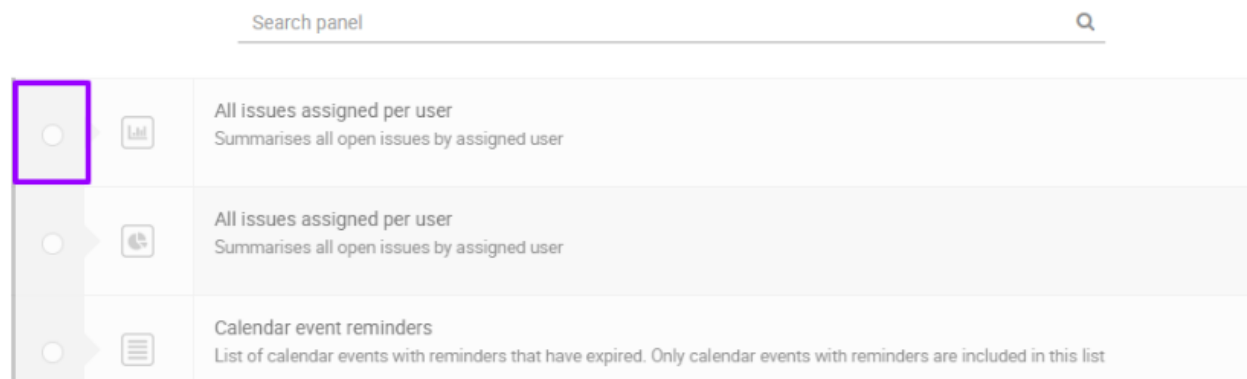


This will create a pop up:

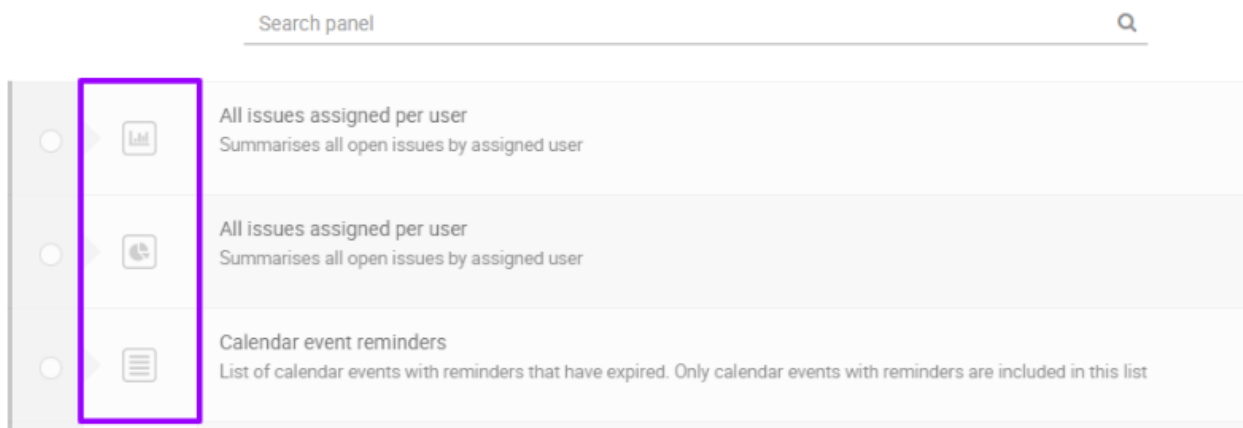


You can scroll down to see all of the options available to you and the search bar is available at the top of the pop-up to help you search for a particular panel.

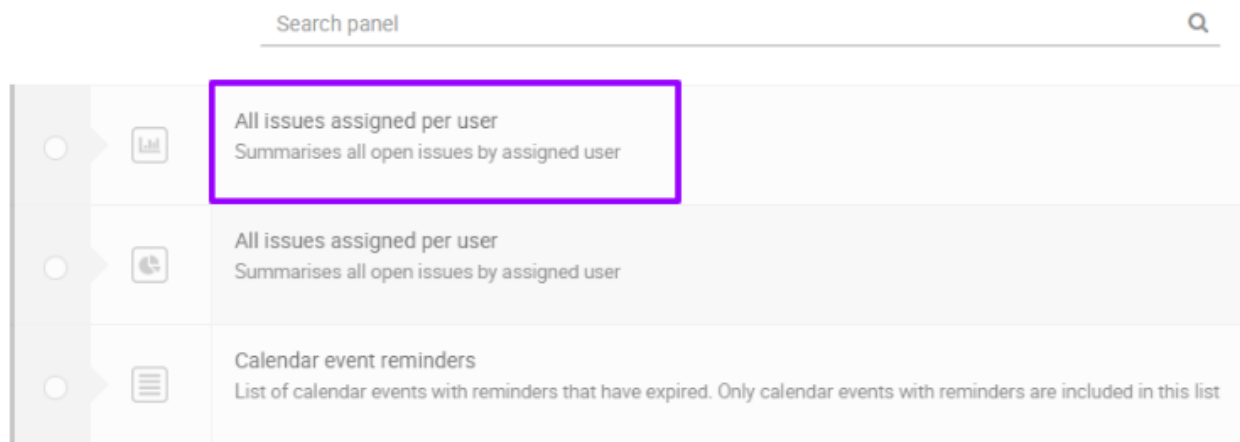
Panels can be selected on the left-hand side of the pop up:



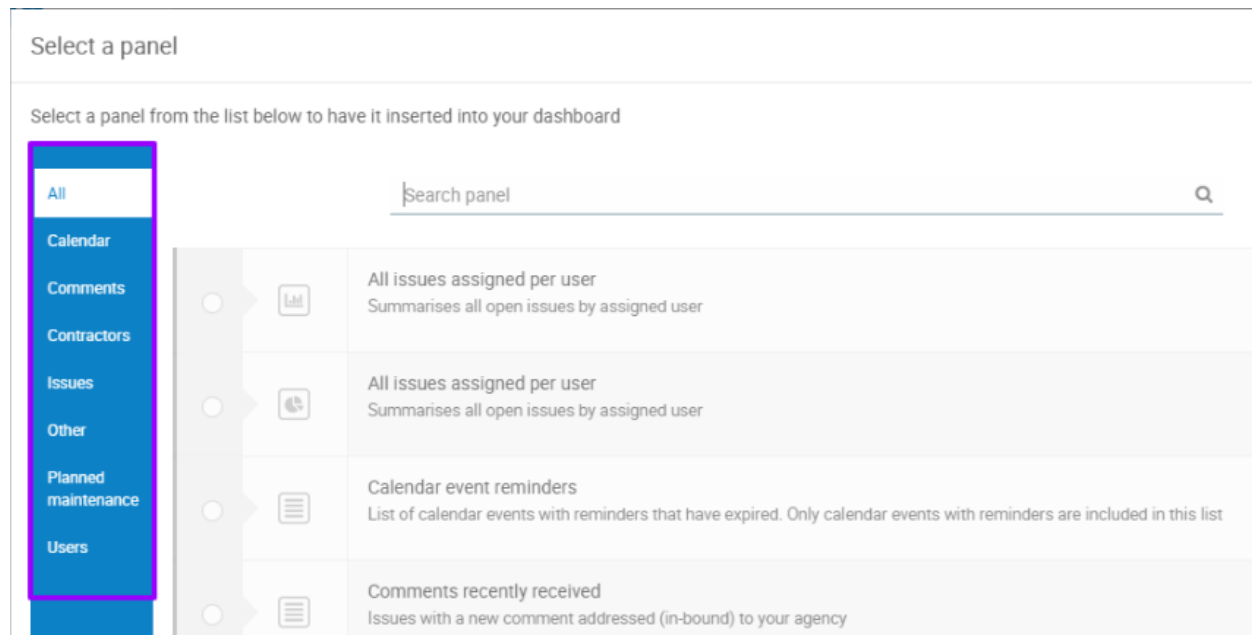
The middle section shows the layout of the panel, for example, the top panel is a bar graph, the middle panel is a pie chart and the bottom panel is text:



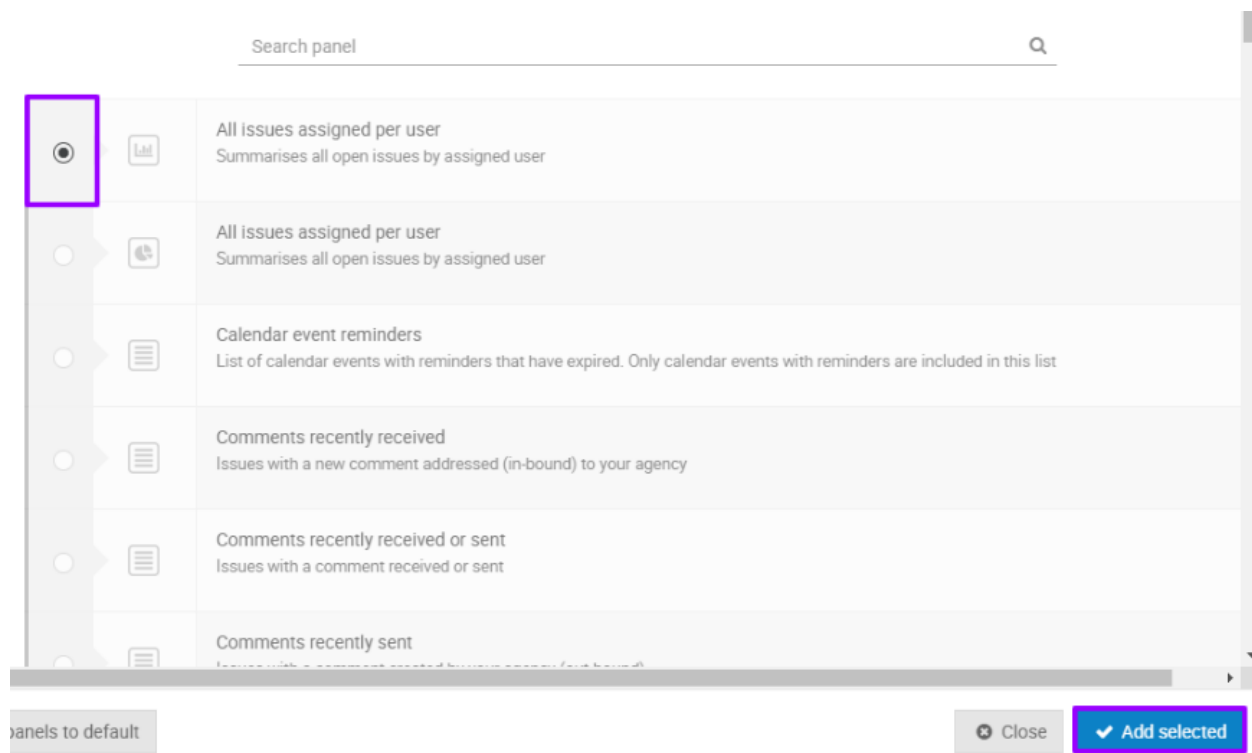
On the right-hand side, there is a description of the panel:

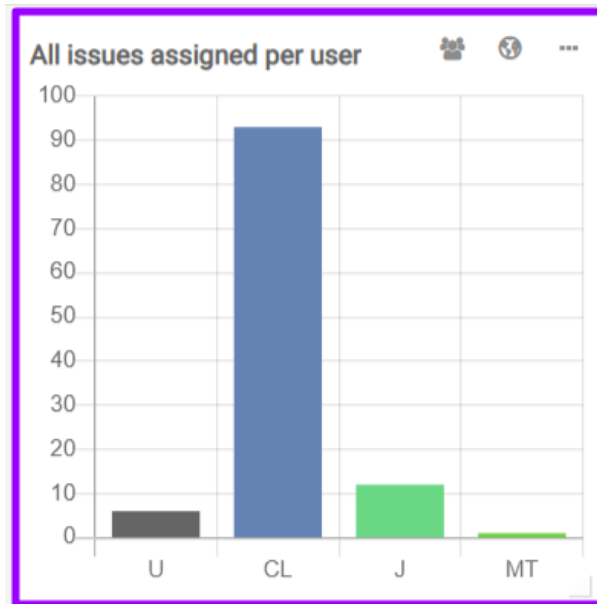


The panels have been segmented on the left-hand side of the pop up to help you search for panels under certain themes:

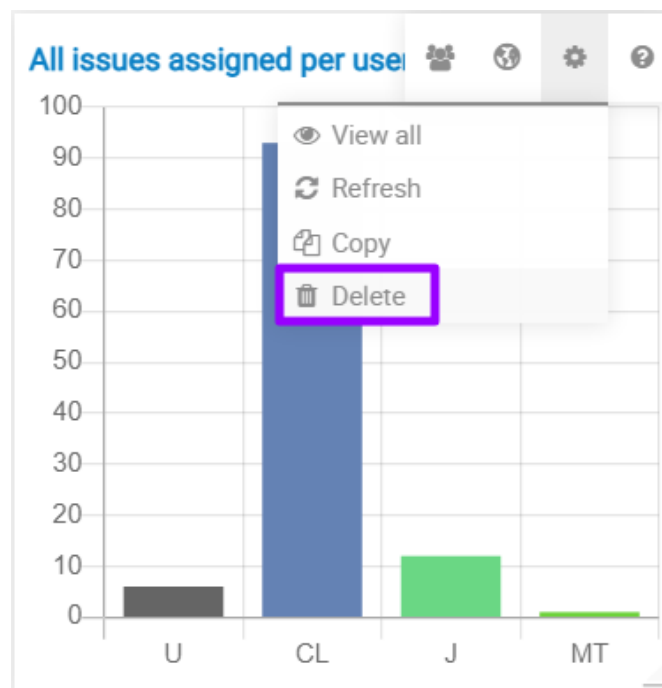


Once you have selected a panel, click on '**Add selected**' and that panel will populate in the location which you had selected. Please note that only one panel can be selected at a time:





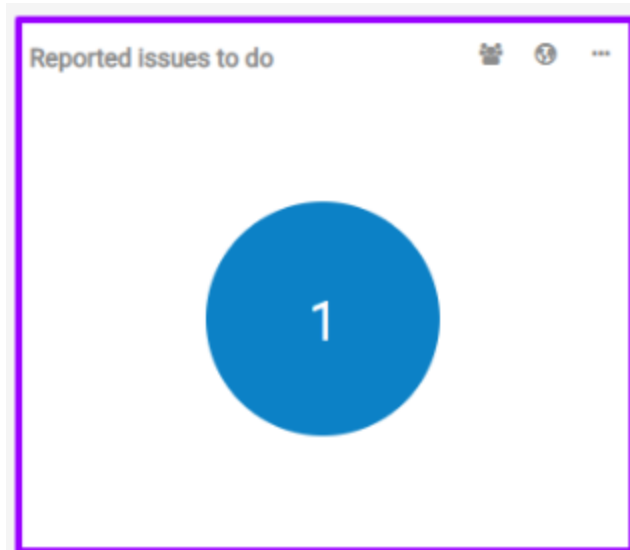
To remove a panel, you will need to hover over that panel where the three symbols in the top right-hand corner of that panel will then jet out and show four icons. Click on the cog and then select the 'Delete' button. This will remove the panel.



Tips for how to customise your Dashboard

When it comes to customising your Dashboard, it is worth starting minimal and building your way up and you get used to the panels and what they mean.

Your first to-do list should be: **'Reported issues to do'**:



This panel will show you all of your 'Reported' issues which have a 'Reminder date' in the past.

Fixflo Professional and Fixflo Essential allow you to resolve end to end management of a reported issue. Each issue will go through a works flow and as it gets progressed, the issue will go from one issue status to another. The first issue status of any given issue will be 'Reported'.

Your second to-do list should be: **'Issues requiring action'**:



An 'Issue requiring action' could mean one of two things:

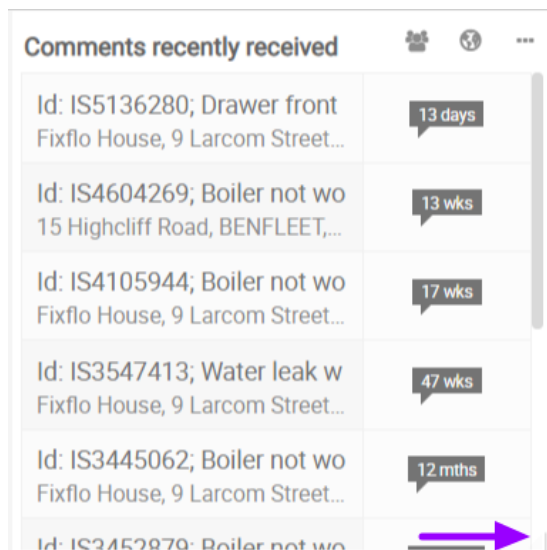
1. The issue status naturally lies with the Agent to take the 'Next step'. For example, the issue may be 'Reported'; 'Awaiting instruction'; 'Landlord instructions received' etc. Any of these issue statuses will lie with the Agent to resolve the issue and therefore will require your action.
2. Issues with a 'Reminder date' in the past. Any issue with a 'Reminder date' in the past will sit in this panel, this ensures that nothing slips through the cracks. For example, if an issue is at the status 'Job awarded, awaiting appointment date' this means that the issue lies with either a Contractor or a Landlord to provide an appointment date to start resolving the issue. As the issue is progressed to the Contractor or Landlord, the 'Reminder date' will update to a date in the future. Once that date comes around, if the Contractor or Landlord has not added an appointment date, the job will come back into your 'Issues requiring action' allowing you to have visibility of this issue so that it does not get forgotten. You then have the option to either move the 'Reminder date' to another date in the future, giving the other party some more time to complete their action, or you can chase them.

How to Move Dashboard Panels

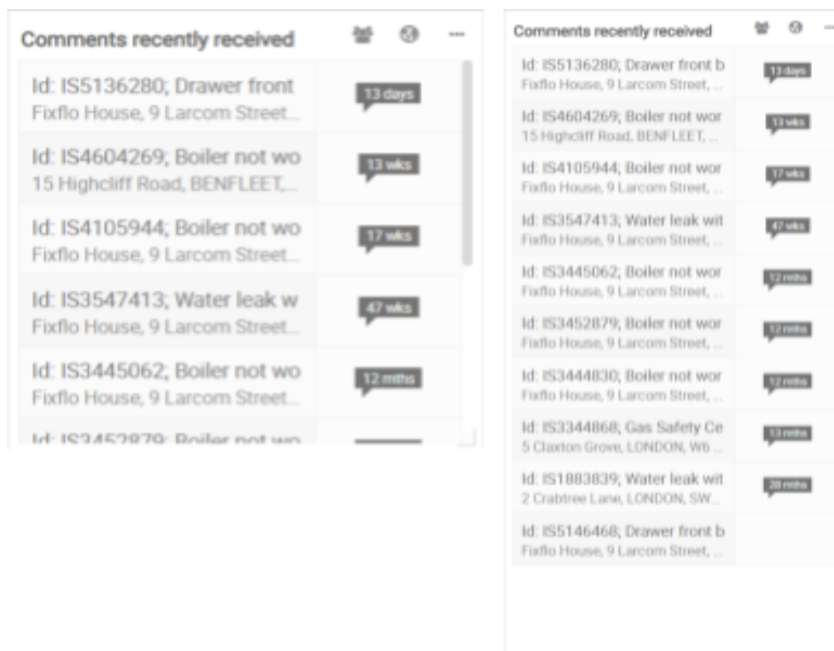
Panels can easily be moved from one location to another. To do this simply pick a panel up from the top of the panel where you can see your cursor change into four arrows and then drop it in the desired location.

How to Resize Your Dashboard Panels

In the bottom-right corner of your Dashboard panel you should see a little grey shape adjacent to the corner of your panel. This grey symbol will allow you to reshape and resize your Dashboard panel.



By changing the size of your Dashboard you are able to possibly see more information in the dashboard panel than was visible before as seen in the example below:



Although both of the panels above are the same, we can see that the panel on the right has been resized to show all of the comments that have recently been received without the need to scroll down which will save you, the agent, time and will allow for full visibility for the dashboard.

Filters On The Dashboard

Each panel will have filters added to them on the Dashboard. These appear on the top right-hand corner of each panel and these can be filtered out to show you who's issues you are viewing and which issues you are viewing.

Who's issues you are viewing:

This will be shown on the symbol which is on the left-hand side on the row of symbols which are displayed. This is showing you who's issues you are viewing.

This can be split between 'All', 'My properties', 'My (including unassigned)', 'My (only)' and teams, if you have teams set up on your Fixflo system.

To explain this further:

'All': Everybody's issues

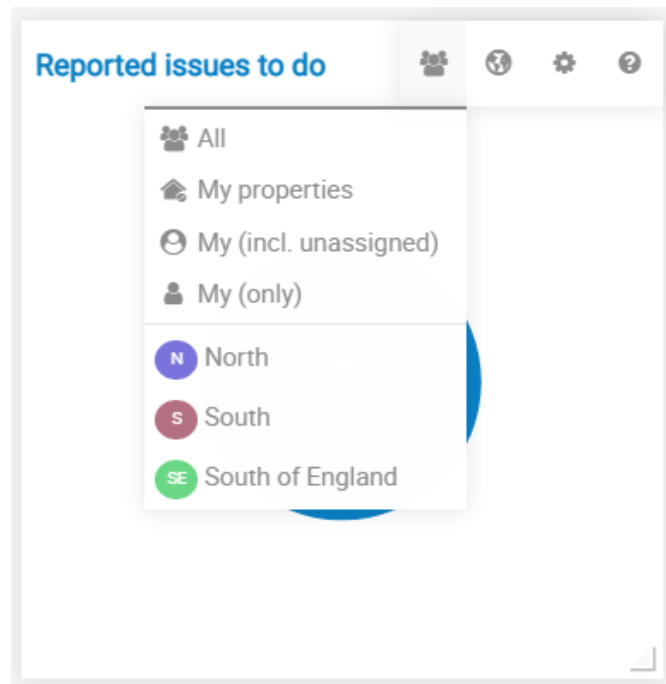
'My properties': These are the issues which you are not assigned to, but these are all of the issues at your properties. This works well for if you do not manage the day to day maintenance of properties, but perhaps you manage the budgets instead.

My (including unassigned): These are all of the issues which are allocated to you and all of the issues which are currently marked as unassigned.

My (only): These are all of the issues which are assigned to you and you only. These will not include any unassigned issues.

Teams: If you have teams set up then you can oversee all issues assigned to that team. This will not include unassigned issues.

When you hover over a panel the symbols will slide out to the left-hand side and you will be able to make changes to who's issues you are viewing. These options allow the Dashboard to work across all roles within your company.

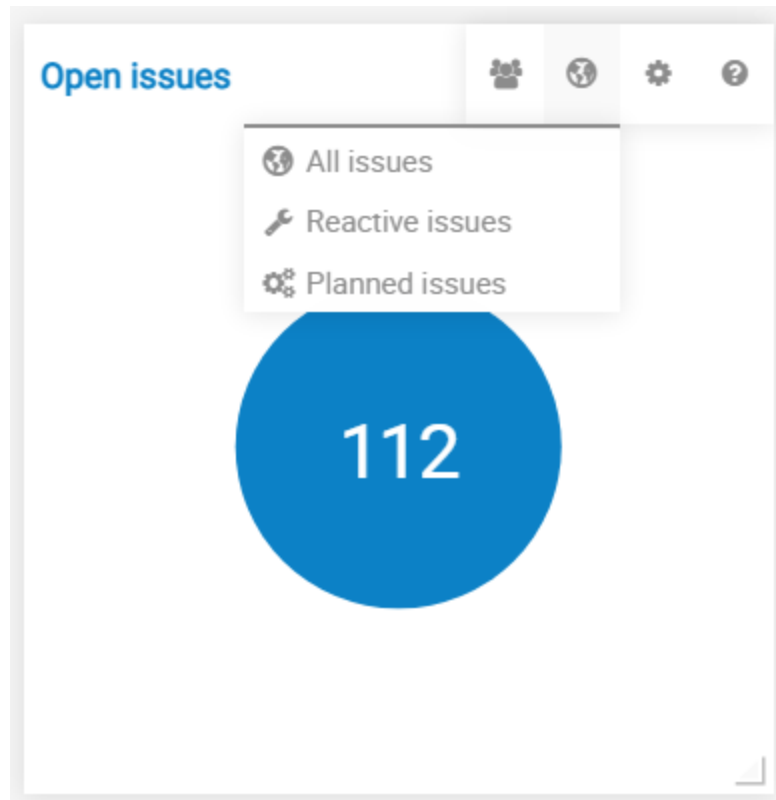
**Which issues you are viewing:**

If you are subscribed to Fixflo Professional then you will be able to manage all of your Planned Maintenance issues on Fixflo as well. If this is the case you will be able to use the filters to filter out between viewing all issues, reactive issues and planned issues.

This filter sits on the right-hand side of the 'Who's issues' symbol.

All issues are both your reported and planned issues and this is shown using a globe symbol. Reactive issues are symbolised using a spanner and planned issues are shown with cogs.

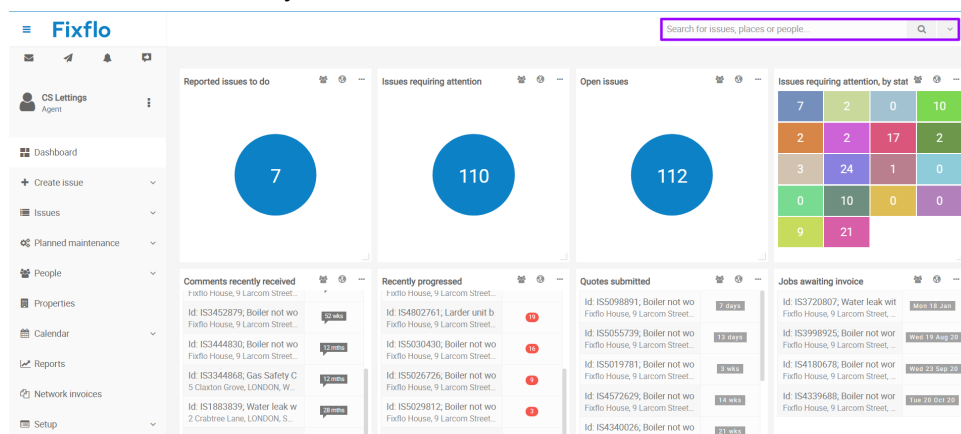
If you hover over the panel you will be able to make changes to these filters as well.



Searching for an issue

Issues can be searched for in three key places:

1. Top right from any screen: here you can enter the IS number, property, occupier, landlord and contractor within your Fixflo site.



2. By going to **Issues > Issue Search**:

Issue search

Search issues: Enter id, address or name

Is open: Yes

62 results Options Sort

Brand	Issue details	Job status	Count
Brand: CS Lettings Ref: IS4143545 Raised: Wed 16 Sep	Boiler not working (Electric Boiler) Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	Job awarded, awaiting appointment date Awaiting start date, occupier presence requested Assigned to: Jessica	1 9
Brand: CS Lettings Ref: IS4139282 Raised: Tue 15 Sep	Boiler not working (Gas Boiler) Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	Job awarded, awaiting appointment date Awaiting start date, occupier presence not required	1 1
Brand: CS Lettings Ref: IS4105944 Raised: Wed 09 Sep	Boiler not working (Electric Boiler) Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	Awaiting job completion Job started 2 days ago Assigned to: Jessica	1 2
Brand: CS Lettings Ref: IS4095247	Boiler not working (Electric Boiler) Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	Job awarded, awaiting appointment date Awaiting start date, occupier presence not required	1 9

You can search by:

- Address
- Name (searching by surname is likely to return more relevant results)
- IS number (this is unique to each issue)

Issue search

Search issues

Enter id, address or name

Is open

Yes

Advanced searches can be made by clicking the arrow on the right-hand side, which reveals the advanced search options shown below:

Issue search

Search issues: Enter id, address or name

Is open: Yes

↓

There are many filters available to help you find the issues you are looking for:

Issue search

Search issues

Is open ▼

Is on hold ▼

Has outstanding action ▼

Is planned maintenance ▼

Has unread comments ▼

Status ▼

Raised between ▼

Assigned to team ▼

Assigned to agent ▼ All issues assigned to all agents for progression, within this brand

- By going to the property record. Go to 'Properties' and click into the record. You can access a history of the property's issues under the 'Issues' tab:

Property Fixflo House, 9 Larcom Street, LONDON, SE17 1RT

[Detail](#) [Addresses](#) [Issues](#) [Landlords](#) [Occupiers](#) [Documents](#) [Certificates](#) [Reminders](#) [Works planner](#)

Search issues

Is open ▼

40 results [Options](#) [Sort](#)

Brand: CS Lettings Ref: IS4143545 Raised: Wed 16 Sep	Boiler not working (Electric Boiler) Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	Job awarded, awaiting appointment date Awaiting start date, occupier presence requested Assigned to: Jessica	1 0
Brand: CS Lettings Ref: IS4139282 Raised: Tue 15 Sep	Boiler not working (Gas Boiler) Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	Job awarded, awaiting appointment date Awaiting start date, occupier presence not required	1 1

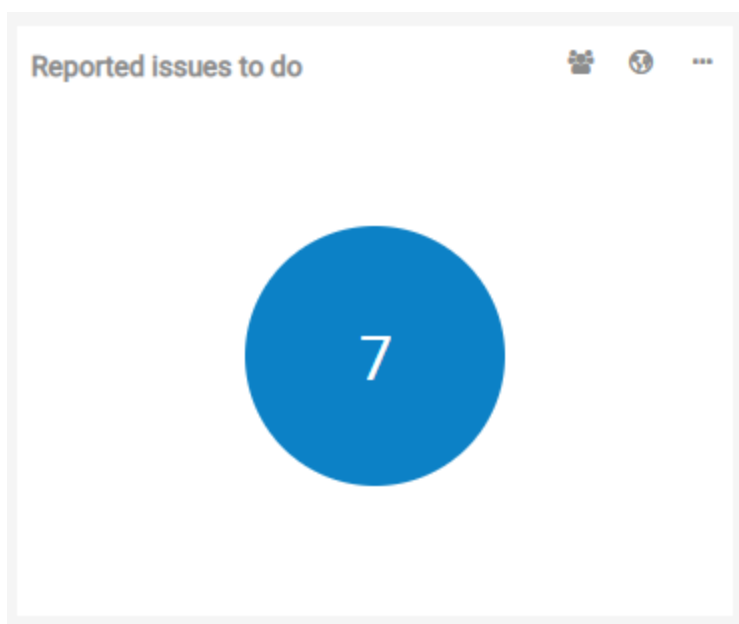
Progressing issues in Fixflo

Once an issue has been reported by an occupier, an email notification will be sent to them confirming that the issue has been sent through to you.

Depending on the settings you have on your Fixflo site, you may have issues that are automatically assigned to an agent that is responsible for a property, postcode or even a landlord. It's not just agents that can be assigned issues within Fixflo. It can also be teams if they have been set up within your Fixflo site.

How do you assign issues to other agents?

1. Firstly, check the '**Reported issues to do**' panel for your team on your Fixflo dashboard. All newly reported repair requests will be listed here.



Note: Prior to reassigning the issue, please ensure to:

1. Review information under the '**Detail**' tab
 2. Review that the "**Issue priority**" and title are accurately displayed
 3. Read Property and Landlord notes
-
2. To reassign this issue to another agent click on the '**Assignment**' tab where you will be able to select another user in the '**Assigned agent**' field. Once you have selected a new user, please press '**Save**' to apply the change.

IS4185111 Boiler not working (Gas Boiler)
|
|
Actions

Fixflo House, 9 Larcom Street, LONDON, SE17 1RT

Reported CS Lettings (charliefixflo+cslet@gmail.com)

Next steps
Detail
Comments
Appointments
Related
Documents
Assignment
Audit

Reassign issue

Assigned agent AG03354538: CS Lettings (charliefixflo+cslet@gmail.com)

Assigned team North

Save

Once the issue has been reassigned to the most suitable agent, their name will be displayed towards the top of the screen:

IS4185111 Boiler not working (Gas Boiler)
|
|
Actions

Fixflo House, 9 Larcom Street, LONDON, SE17 1RT

Reported CS Lettings (charliefixflo+cslet@gmail.com)

Next steps
Detail
Comments
Appointments
Related
Documents
Assignment
Audit

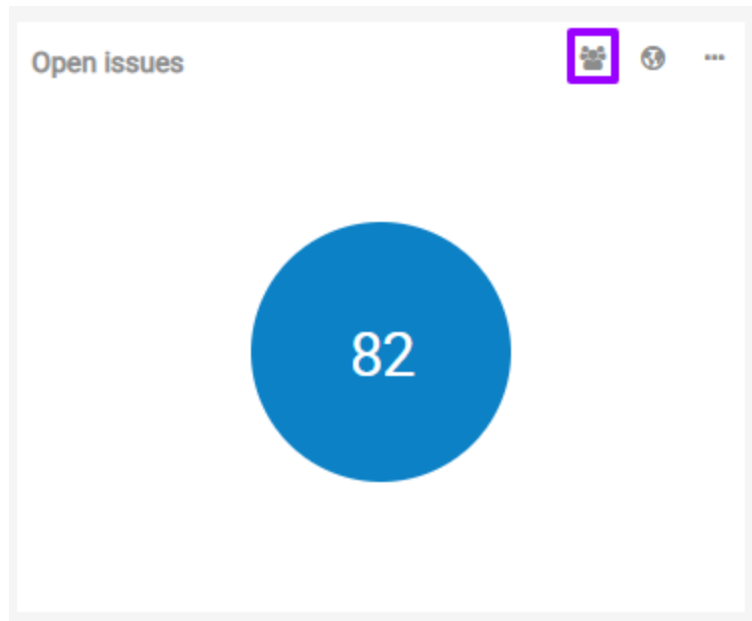
Reminder date Wed 23 Sep, 17:47 0

Issue priority 1

Task to do

Agent
Occupier
Occupiers (other)
Landlord
Reporter

Each agent will be able to keep track of how many issues are assigned to one another by clicking on the **'Open Issues'** dashboard tile. To ensure you can see all agents' open issues, set the filter on the panel to 'All'. The filter is displayed by the silhouette as seen below:



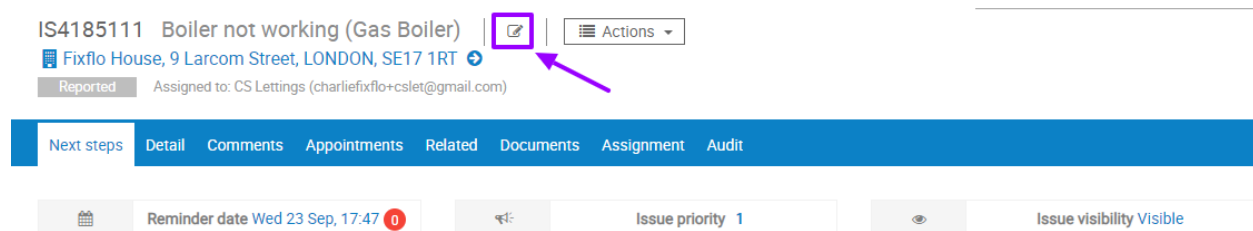
How can an agent update the priority level and title of an issue?

Before allocating the issue to an agent or a contractor, it would be best to:

- Review information under the 'Detail' tab
- Read the Property and Landlord notes

There might be cases where another agent wants to make some slight changes to the issue name or even the issue priority level.

To do this, simply click on the **'Edit'** button on the right-hand side of the issue title:



You can then select from a drop-down of priority and ensure the right one is applied to that issue:

< Back

Search issues



IS4185111 Boiler not working (Gas Boiler)

Fixflo House, 9 Larcom Street, LONDON, SE17 1RT

Reported

Assigned to: CS Lettings (charliefixflo+cslet@gmail.com)

Issue setup

Occupier setup

Sometimes it is appropriate to provide a more descriptive title for the issue. Enter/edit the issue title here.

Issue title

Boiler not working (Gas Boiler)

Reset

Save

Issues are prioritised according to the Issue type. However, you might wish to change the priority of an issue, if further damage may occur or an occupier has special needs for example. Enter/edit the issue priority here.

Issue priority

1 - Urgent (high)

Reset

Save

This setting identifies the issue as being private or communal. This dictates the flow of actions required. For example, whether the occupier who submitted the issue will be notified of a contractors appointment time.

Issue location type

Private area - This issue is within/relating to a private residence

Save

The reminder is when the issue is expected to progress. It is set automatically when the status changes, or you can update it manually. Issues won't show in "Tasks to do" on the dashboard until it's reached.

Reminder date

23-09-2020



5:47 PM



☐ Place issue on hold

Save

This is the cost code associated with the issue, used in reporting for allocating job costs to funds.

Cost code

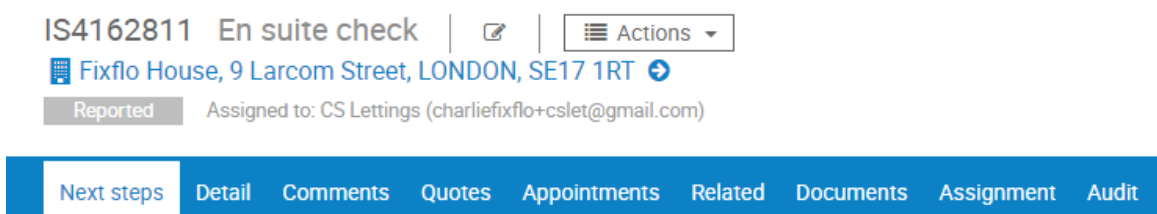
Save

Remember to press 'Save' after selection so that the changes are applied.

Viewing an issue

There are various tabs in an issue on Fixflo:

1. Next steps
2. Details
3. Comments
4. Quotes (please note this only appears if you use the quote workflow)
5. Appointments
6. Related
7. Documents
8. Assignment
9. Audit



Next steps

The next steps tab shows all parties that are related to the issue, so this would include the agent, occupier, landlord and any contractors added to the issue. Contact details for each party will appear once you click on their icon, important information (re: issue priority and whether the occupier has requested to be present or not), the current status of the issue, notes that have been lodged against a Landlord or Property profile, and the options for progressing the issue (i.e workflows).

Detail

The details screen shows all the information provided about the issue including:

- Landlord information
- All details about the repair request
- Any photos or videos if they have been added
- Details of the property
- Tenants contact details
- Answers to the COVID 19 questions (if applicable)

This section will build up as the issue is progressed and end up including all job completion details, cost details and feedback details.

Fixflo

IS4185111 Boiler not working (Gas Boiler) | Actions

Reported Assigned to: CS Lettings (charliefixflo+cslet@gmail.com)

Next steps Detail Comments Appointments Related Documents Assignment Audit

Address information

Landlord Ms Jean Smith (charliefixflo+jeansmith@gmail.com) Change View

External user Change View

Information

Raised Wed 23 Sep, 17:47 by Agent CS Lettings (charliefixflo+cslet@gmail.com)

Occupier Mr Steve Jobless

Email juwonfixflo+sj@gmail.com

Phone number 01702 558284

Occupier no. TE96618777

Tenancy Reference Number N/A

Vulnerable occupier at property No

Occupier presence at works requested No

Report details

Comments

Comments help you keep relevant information centralised and have it time stamped. You will also be able to message your contractors, landlord, occupiers and others. In essence, you have the ability to:

1. Leave private notes/upload emails

If you flick the **'Private Note'** switch you can leave notes that are only visible to other colleagues (i.e Property Managers, Team Leads and Property Directors). No tenants, landlords or contractors will be able to view these so you can easily log call notes, handover notes or anything that you want related to that issue.

Next steps Detail Comments Appointments Feedback Related Documents Assignment Audit

All occupiers

Thu, 24 September 2020

CS Lettings 15:26

I've requested the contractor's availability via email - waiting for feedback

Hi Steve, just messaging to let you know we are looking into the issue now and will update you on here once we've started progressing the issue.

CS Lettings to Occupier (Mr Steve Jobless (juwonfixflo+sj@gmail.com)) 15:33

Private note

Send to Enter your message Send

Note: You can upload emails via private notes. Simply download the email and save it, and then upload and save.

2. Message other related parties

You will be able to message contractors and occupiers via the '**Comments**' tab. Contractors will also be able to message you via both the mobile app and their online portal. They will receive email notifications of new comments and push notifications if they are using the app. Comments sent and received on Fixflo will look like Whatsapp/iMessage bubbles. You will also have the ability to message other agents through Fixflo by entering your colleague's name in the send to section.

Hi Steve, just messaging to let you know we are looking into the issue now and will update you on here once we've started progressing the issue.

CL

CS Lettings to Occupier (Mr Steve Jobless (juwonfixflo+sj@gmail.com)) 15:33

Quotes

The Quotes tab is where you can keep up to date with all quotes that have been submitted for the issue you are currently working on. This tab will show quotes that have been submitted, pending, rejected and who the job has been awarded to once you have instructed the works to the contractor who's quote you have accepted, as well as the price they have quoted.

IS4162811 En suite check

Fixflo House, 9 Larcom Street, LONDON, SE17 1RT

Job awarded, awaiting appointment date

Assigned to: CS Lettings (charliefixflo+cslet@gmail.com)

Next steps

Detail

Comments

Quotes




Appointments

Related

Documents

Assignment

Audit

	£240.00 Rejected	Gordan's Electrics (Mr Gordan Ramsey) Ref: CO29525216
	£204.00 Rejected	RS Appliances (Mr Rick Stein) Ref: CO95639858
	£144.00 Awarded	AH Plumbing & Heating Services (Mr Ainsley Harriet) Ref: CO30788244

Appointments



This page will allow you to have an overview of any upcoming or previous bookings.

Next steps	Detail	Comments	Appointments	Related	Documents	Assignment	Audit
Wed, 30 September 2020, anytime		West Plumbing (Mr Jamie Stevens) To carry out works		<div>✕ Decline</div> <div>🗑 Cancel</div>			

Related




The Related tab will show you:

1. Any other issues raised at the property and, whether they are opened or closed
2. Any linked issues and allow you to link the issue to another
3. It will also show you any other tenants associated with the property
4. Any interested people you have added to the issue

Next steps	Detail	Comments	Appointments	Related	Documents	Assignment	Audit								
Other occupiers at this property				<div>+ Add occupier</div> <div>  <p>No occupiers found</p> </div>											
Linked issues				<div>+ Add related issue</div> <div>  <p>No issues found</p> </div>											
Other issues at this property				<table border="1"> <thead> <tr> <th>Ref: IS4066936</th> <th>Gas Safety Certificate (CP12) Only</th> <th>Job awarded, awaiting appointment date</th> <th>3</th> </tr> </thead> <tbody> <tr> <td>Raised: Wed 02 Sep</td> <td>10 Downing Street, London, SE17 2RT</td> <td>Awaiting start date, tenant presence not required</td> <td></td> </tr> </tbody> </table>				Ref: IS4066936	Gas Safety Certificate (CP12) Only	Job awarded, awaiting appointment date	3	Raised: Wed 02 Sep	10 Downing Street, London, SE17 2RT	Awaiting start date, tenant presence not required	
Ref: IS4066936	Gas Safety Certificate (CP12) Only	Job awarded, awaiting appointment date	3												
Raised: Wed 02 Sep	10 Downing Street, London, SE17 2RT	Awaiting start date, tenant presence not required													
Interested people				<div>+ Add person</div>											

Documents

The Documents tab will show any photos, PDFs and other documents attached to the issue as it is progressed. These documents can be attached by tenants, contractors or Property Managers.

Next steps	Detail	Comments	Appointments	Related	Documents	Assignment	Audit								
<div> <div>Type (Any) ▾</div> <div>Sort By Create date ▾</div> <div>Sort direction Desc ▾</div> <div>🔍 Search</div> </div>															
<table border="1"> <thead> <tr> <th>Type</th> <th>Issue photo</th> <th>IS4185111 - Boiler not working (Gas Boiler)</th> <th></th> </tr> </thead> <tbody> <tr> <td></td> <td>Broken Boiler</td> <td>Reported Raised 1 day ago</td> <td> <div>📄</div> <div>📄</div> <div>📄</div> </td> </tr> </tbody> </table>								Type	Issue photo	IS4185111 - Boiler not working (Gas Boiler)			Broken Boiler	Reported Raised 1 day ago	<div>📄</div> <div>📄</div> <div>📄</div>
Type	Issue photo	IS4185111 - Boiler not working (Gas Boiler)													
	Broken Boiler	Reported Raised 1 day ago	<div>📄</div> <div>📄</div> <div>📄</div>												

Assignment

The assignment tab allows you to control which person or team owns and manages that issue. An issue can be assigned to a specific agent or a team of agents or both! Once an issue is assigned to someone, all issue notifications will go to them by default and will show as assigned to them on their dashboard.

The screenshot shows the 'Assignment' tab selected in a blue navigation bar. Below the bar, the 'Reassign issue' section contains two dropdown menus. The first, 'Assigned agent', is set to 'CS Lettings (charliefixflo+cslet@gmail.com)'. The second, 'Assigned team', is set to 'North'. A blue 'Save' button with a checkmark is positioned below the team dropdown.

Next steps Detail Comments Appointments Related Documents **Assignment** Audit

Reassign issue

Assigned agent CS Lettings (charliefixflo+cslet@gmail.com) x ▼

Assigned team North ▼

✓ Save

Audit

The audit trail shows a history of any actions taken on the issue, who did them and when. Those actions include:

- Status changes
- Comment sent and received and whether they have been opened
- When system emails are sent/received/opened
- Quote approvals
- Invoice uploads

IS4185111 Boiler not working (Gas Boiler)



Actions ▾

Fixflo House, 9 Larcom Street, LONDON, SE17 1RT



Reported

Assigned to: CS Lettings (charliefixflo+cslet@gmail.com)

Next steps

Detail

Comments

Appointments

Related

Documents

Assignment

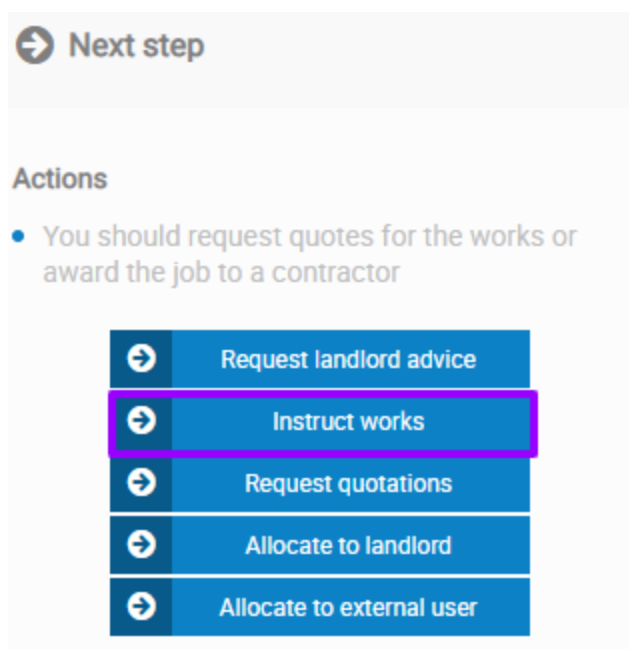
Audit

1

Created	Type	Status	
Thu 24 Sep, 16:33	Email	Sent	Comment Notification using email address: juwonfixflo+sj@gmail.com sent by: Agent (AG03354538)
Wed 23 Sep, 17:49	Agent assignment	Agent assignment	Issue assignee was changed from Jessica (jessica.dubey+fixflo@fixflo.com) (AG68609993) to CS Lettings (charliefixflo+cslet@gmail.com) (AG03354538) by CS Lettings (charliefixflo+cslet@gmail.com) (AG03354538)
Wed 23 Sep, 17:47	Email	Sent	Issue Creation using email address: juwonfixflo+sj@gmail.com sent by: System
Wed 23 Sep, 17:47	Email	Sent	New Issue Reported Agent using email address: jessica.dubey+fixflo@fixflo.com sent by: Agent (AG03354538)
Wed 23 Sep, 17:47	Reported		The issue was reported by CS Lettings (charliefixflo+cslet@gmail.com) (AG03354538) on Wed, 23 September 2020 at 17:47
Wed 23 Sep, 17:47	Agent assignment	Agent assignment	Issue assignee was changed from (Unassigned) to Jessica (jessica.dubey+fixflo@fixflo.com) (AG68609993) and assigned team was changed from (No team) to North by System

How does an agent instruct works to a contractor?

To instruct an issue to a contractor simply select the '**Instruct works**' option from the Next Steps screen:



On the next screen, there are several fields. Not all of them are mandatory, however, we recommend that Property Managers review and add the relevant information:

- **Works authorisation limit:** These can be dictated by the limit set on the user role permissions if required.
- **Works due by:** add this in line with the priority of the job
- **Instruction Notes:** contractors will automatically have access to all details about the issue but you can input more information
- **Paying for work** - This will default to the landlord but if you need to change this to indicate the tenant is accountable for paying for the works you can
- **Invoice** - This is auto set to the landlord but if you need to change this to indicate the tenant is actually accountable for paying for the works you can

Instruct works

Works authorisation limit

£ 500.00

This will serve as the contractor's budget for the job. Please note: The landlord has a per job limit of £500.00

Works due by

Instruction notes

Describe the the works you require from the contractor

This is a statement of the works you require from the contractor 4000 characters remaining

Instruction documents

Click to upload

For example, permits to work and/or site specific information

The selected health and safety documents will be sent to the contractor when they are instructed or quotes requested

Health & safety document

Payment

Who will be paying for the works.

Paying for work Landlord

Cost code

Search by cost code ID or description

Close

Proceed to next step

Once you have completed all necessary fields click **'Proceed to next step'**.







You will now be able to select the contractor you want to award the job to (a list of all contractors will appear):

Instruct contractor

Search for a contractor to award this job to. This job may be awarded to only one contractor.

Search contractors

Enter name, id, email, address or postcode

	West Plumbing (Mr Jamie Stevens) - 5 miles Email: laurenfixflo+jamie@gmail.com, Tel1: 0722334455	<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div>9</div> <div>8</div>
	Gordan's Electrics (Mr Gordan Ramsey) - 2 miles Email: laurenfixflo+gordan@gmail.com, Tel1: 0789898989 Electrician	<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div>1</div> <div>0</div>
	AH Plumbing & Heating Services (Mr Ainsley Harriet) - 2 miles Email: laurenfixflo+ainsley@gmail.com, Tel1: 07234523224 Gas Safety	<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div>5</div> <div>1</div>
	Pest Control Ltd. (Miss Mary Berry) - 4 miles Email: laurenfixflo+mary@gmail.com, Tel1: 0765434234 Pest control	<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div></div> <div>0</div>
	RS Appliances (Mr Rick Stein) - 5 miles Email: laurenfixflo+rick@gmail.com, Tel1: 0723423423 Appliances	<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div></div> <div>0</div>
	Lawson's Lawns (Miss Nigella Lawson) - 5 miles Email: laurenfixflo+nigella@gmail.com, Tel1: 0789346723 Gardening, Tree surgeon	<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div></div> <div>0</div>

Close

Proceed to next step

You can search for them by name or email in the main search bar. The drop-down arrow allows you to do advanced searches by location, services and compliance.

With time, you will have noticed that next to each contractor's details you will find additional and useful details:

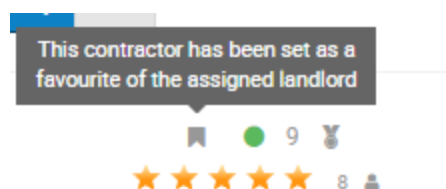
	West Plumbing (Mr Jamie Stevens) Ref: C071876631 Plumber	  
	Gordan's Electrics (Mr Gordan Ramsey) Ref: C029525216 Electrician	 
	RS Appliances (Mr Rick Stein) Ref: C095639858 Appliances	 
	AH Plumbing & Heating Services (Mr Ainsley Harriet) Ref: C030788244 Gas Safety, Heating , Plumber	 

The first thing you would want to notice when selecting a contractor would be their certification. To help you ensure all of your contractors are fully compliant with regulations, we have built a feature enabling you to request certificate documents from each contractor profile. We use a traffic-light system to monitor contractor certification:

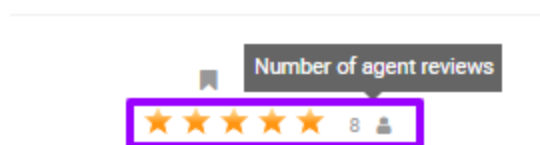
Red - A certificate or certificates has expired.

Orange - A certificate or certificates are close to expiring.

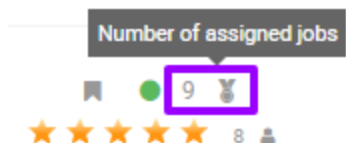
Green - All certification is valid.



The ribbon beside a contractor's certification means they are a preferred contractor and will be displayed on top of the list - if you have a contractor that you use the most, this could be helpful to avoid having to search for their name.

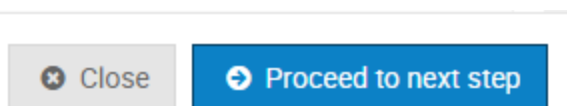


The stars reflect internal ratings of the contractor which happen when an issue is closed. These are for internal use only. If you hover over the stars you can see the average rating and how many people have reviewed them.

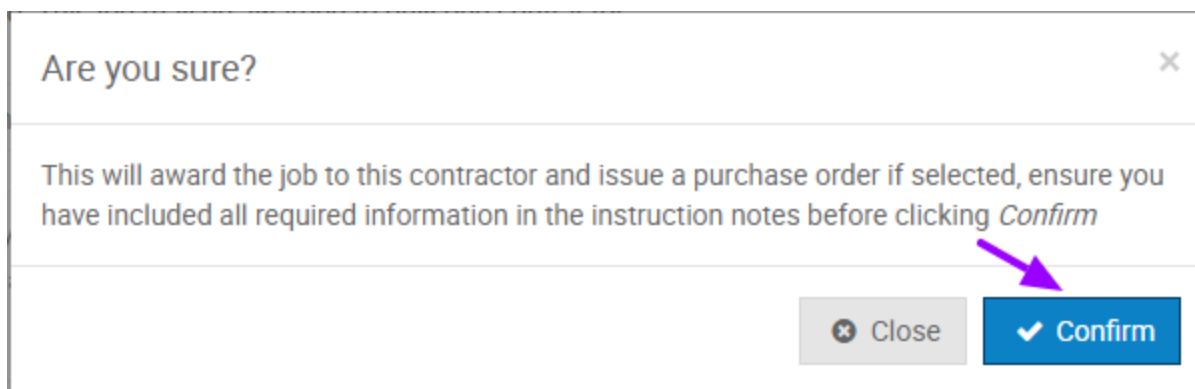


The medal will indicate the number of jobs that a contract has currently assigned to them.

Again, when you have selected the contractor click '**Proceed to next step**'.



And then click '**Confirm**' to alert the contractor about the job. They will receive an email and a push notification on the Fixflo contractor mobile app if it's been downloaded by the contractor:



The status of the job has now changed to '**Job awarded, awaiting appointment date**' and you can see that you are waiting on the contractor.

IS4181609 Boiler not working (Electric Boiler) | | Actions ▾

Fixflo House, 9 Larcom Street, LONDON, SE17 1RT

Job awarded, awaiting appointment date Assigned to: CS Lettings (charliefixflo+cslet@gmail.com)

Next steps Detail Comments Appointments Related Documents Assignment Audit

Reminder date Mon 28 Sep 3 Issue priority 1

Agent Occupiers (other) Landlord Contractor

Waiting for

How does an agent book an appointment on behalf of the contractor?

Once you have communicated with the contractor to check their availability and assuming that they have confirmed the day/time that they can go onsite, you will then book the appointment on their behalf.

Simply click on the contractor's icon and choose the option **"Set appointment date"** under the **"Next steps"** section:

Fixflo

IS4181609 Boiler not working (Electric Boiler) | Actions

Fixflo House, 9 Larcom Street, LONDON, SE17 1RT

Job awarded, awaiting appointment date Assigned to: CS Lettings (charliefixflo+cslet@gmail.com)

Next steps Detail Comments Appointments Related Documents Assignment Audit

Reminder date Mon 28 Sep 3

Issue priority 1

Issue visibility Hidden

Waiting for

Agent Occupiers (other) Landlord Contractor

West Plumbing (Mr Jamie Stevens) [+](#)

laurenfixflo+jamie@gmail.com 0722334455

Send summary email

Job awarded, awaiting appointment d...

Next step

Current state

- The issue has been awarded to you.
- This issue does not have an associated occupier
- A works authorisation limit of £500.00 has been set against this job
- Issue priority 1 - Urgent (high)

Actions

- You have been allocated a job. Please advise a time and date for when the work will be undertaken.

Set appointment date

A pop up will appear and prompt you to add the date and time of the appointment and whether it was agreed with the occupier or not.

Set appointment date

Appointment Date 30-09-2020

Appointment Time Any

Appointment agreed with occupier ☒ Yes ☐ No

Send a calendar invite ☐

Close Save appointment date

Note: In some cases when an occupier has requested to be present during the works, it is essential for the occupier to be contacted and that the booking is agreed before saving the appointment date with the contractor.

Assuming that the appointment has been agreed with both parties and that the details have been entered in the above page, you can then click **“Save appointment date”** so that the contractor receives an email confirmation.

Set appointment date

Appointment Date: 30-09-2020

Appointment Time: At 3:30 PM

Appointment agreed with occupier: ☒ Yes ☐ No

Send a calendar invite: ☐

Close Save appointment date

Important note: if you have selected that the appointment has been agreed with the occupier, they will be notified of this via email. If the occupier has requested to be present but you haven't chosen that the appointment was agreed with them, they will still receive an email, but this time stating that the contractor has proposed a date/time, so they can accept or reject.

When an occupier logs an issue and requests not to be present, they will still receive an email confirmation of the appointment that was made by the contractor - this is to ensure that they are kept in the loop.

The issue status will automatically change to **"Awaiting job completion"** once the agent has saved the appointment:

IS4181609 Boiler not working (Electric Boiler) | Actions

Fixflo House, 9 Larcom Street, LONDON, SE17 1RT

Awaiting job completion Assigned to: CS Lettings (charliefixflo+cslet@gmail.com)

Next steps Detail Comments Appointments Related Documents Assignment Audit

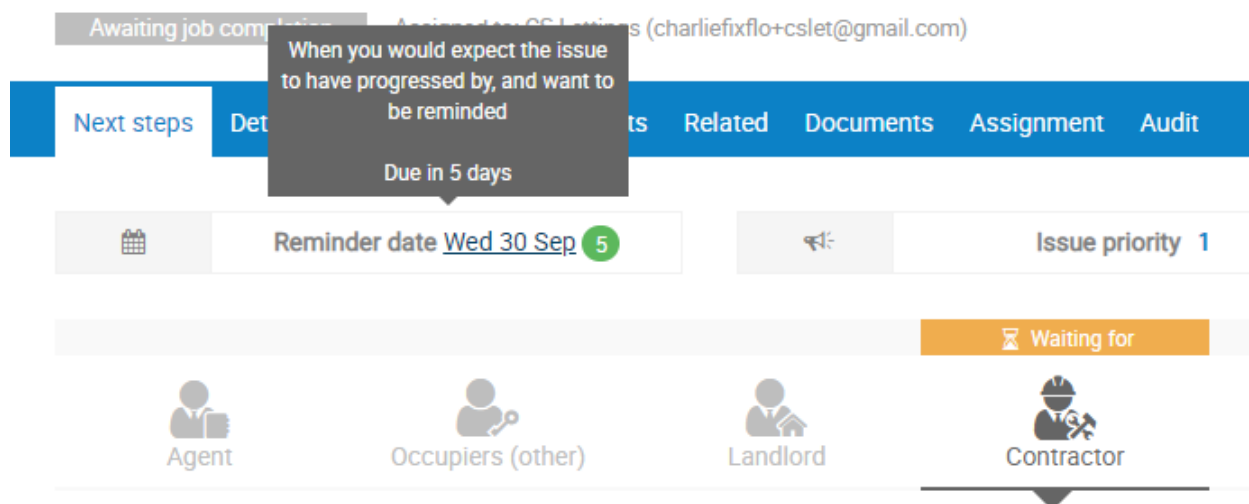
Reminder date Wed 30 Sep 5 Issue priority 1

Agent Occupiers (other) Landlord Contractor

Waiting for

Reminder Dates/Putting issues on hold

The reminder date functionality controls when jobs pop back into your issues requiring action list on your dashboard.



For example, if a contractor has a job due for completion today, tomorrow the issue is going to be back in your to-do list if the contractor has not marked the job complete. This is useful as it allows you to keep up to date with an issue you may have possibly missed as the next step does not lie with you.

You can click on the reminder date to push an issue out, or bring it forwards. You can also click this to put an issue on hold, and provide a reason why you are putting the issue on hold:

The screenshot shows a mobile app interface for setting an issue reminder. At the top, there's a title bar with a close button (X). Below it, four buttons are arranged horizontally: 'Remind me in 1 hour', 'Remind me tomorrow', 'Remind me in 1 week', and 'Reset'. The 'Remind me tomorrow' button is selected. Underneath, the 'Issue reminder date' section has two input fields: the first shows '30-09-2020' with a calendar icon, and the second shows '12:00 AM' with a clock icon. Below these is a checkbox labeled 'Place issue on hold' which is checked. The 'On hold reason' section has a text input field with the placeholder 'Enter the reason the issue is on hold here' and a small instruction below it: 'Mark an issue on-hold if it's not going to progress for a long time for a specific reason'. At the bottom right, there are two buttons: 'Close' and 'Save'.

1 of 7

Issue reminder date / place issue on hold

Remind me in 1 hour Remind me tomorrow Remind me in 1 week Reset

Issue reminder date

30-09-2020

12:00 AM

☒ Place issue on hold

On hold reason

Enter the reason the issue is on hold here

Mark an issue on-hold if it's not going to progress for a long time for a specific reason

Close Save

How does a contractor set an appointment date on an issue?

The preferred method for most agencies would be to award the job to the contractor and for the contractor to then select the works. Once the contractor has been awarded the job they will receive an instant app notification letting them know they have been awarded a job as well as an email with a job sheet attached. They can click through and begin setting their appointment date. The email below is what a contractor will receive when awarded a job:

Fixflo

Dear Mr Stevens,

You have been allocated a job. Please advise a time and date for when the work will be undertaken.

Boiler not working (Electric Boiler)

Ref	IS4181609
Raised	Wed, 23 September 2020 at 11:33
Address	Fixflo House, 9 Larcom Street, LONDON, SE17 1RT
Key reference	CB0089
Current status	Job awarded, awaiting appointment date
Assigned agent	CS Lettings (charliefixflo+cslet@gmail.com)
Ideal work completion date	Wed, 30 September 2020

- The issue has been awarded to you.
- This issue does not have an associated occupier
- A works authorisation limit of £500.00 has been set against this job
- Issue priority 1 - Urgent (high)

Enter job start date

Note: The email your contractor receives will have your agency logo and not the Fixflo one as shown in this example.

How can a contractor mark a job as complete?

The main aim is to have the Contractor mark the job as complete via their profile and to upload all the completion documentation (i.e invoice, photos), rather than updating the agent via email or phone.

Please note that contractors receive daily reminder emails, with your agency's logo, during the week of their outstanding tasks:

Fixflo

28 September 2020

Dear Mr Stevens,

Here is a summary of your outstanding actions:

Tasks to do

1

Unread comments

Issues that have unread comments

[View now >>](#)

7

Jobs awaiting a start date

Jobs that do not have a proposed start date. Ordered by issue priority.

[View now >>](#)

If you have booked a job that was due to be completed today, and the contractor has not marked it as complete, they will get reminded the next day to add completion details.

They can log in to their mobile app, online portal or click through one of these emails, go to the outstanding job and click on **“Mark as complete”**.

Fixflo

Mr Jamie Stevens
Contractor

Dashboard
Reported issues
Issue search
Create issue
Service events
Invoices

IS4181609 Boiler not working (Electric Boiler)
Fixflo House, 9 Larcom Street, LONDON, SE17 1RT
Awaiting job completion Assigned to: CS Lettings (charliefixflo+cslet@gmail.com)

Next steps Detail Comments Appointments

Occupier
This issue has no associated occupier

Information

Awaiting job completion

Current state

- The issue is due to be resolved on Wed, 30 September 2020, at 15:30
- Please contact the agent to arrange access to the property, if required. The key reference is CB0089

Manage appointment

Next step

Actions

- This job is awaiting completion. Please notify us when it has been completed by updating the job completion details, providing costs and an invoice.

Mark as complete
Provide quote instead

A new page will come up requesting the below details:

- **Job completion date:** day/time that the job was completed
- **Job duration:** how long it took the contractor to resolve the problem
- **Invoice method:** they can either select “**Invoice not Required**”, “**Invoice sent outside of this system**”, “**Upload an invoice**” document or “**Create invoice within the system**”

Job completion details

Job completion date 28-09-2020

Job duration 3 hours

Feedback to agent
Provide information about the works completed
1000 characters remaining

Completion photos and documents
Click to upload

Upload any photos or documents (such as job completion forms, service or installation reports, warranties, equipment manuals) related to the work done.

Invoice method (Not set)
You can invoice at the next stage

(Not set)
Invoice not required
Invoice sent outside of this system
Upload invoice
Create invoice within system

Close Mark as complete

Note: A contractor cannot mark the job as complete unless the above has been provided.

Invoicing methods (these can be removed if required):

- **Invoice not required:** Perhaps the invoice was paid already so no invoice will be needed for this job
- **Invoice sent outside the system:** The invoice may have been sent to your agency's email address.
- **Upload an invoice:** If a Contractor uses an accounting system (e.g Quickbooks, Sage, etc.), they can simply upload the generated invoice. If this method is selected they will need to manually enter in their costs.

Job invoices

Address invoices to: Fixflo

→ Your invoice number: INV1234 ✓ Save invoice number

→ Upload invoice: Click to upload Added just now by Contractor

- **Create invoice within the system:** If a contractor is used to creating their invoices through Microsoft Word or even handwriting them, they can then easily create one via Fixflo's invoice generator tool instead

Contractor cost							
Type		Description	Quantity	Unit price £	Net £	Tax £	Total £
Labour	▼	Labour	1	200.00	200.00	40.00	240.00
Materials	▼	Ronseal 6 year Anti Mould Paint	2	40.00	80.00	16.00	96.00
				<div>+ Add a new row</div>			
				<div>🗑 Remove the last row</div>			
						Total Net £	280.00
						Total Tax £	56.00
						→ Total £	336.00

Once all the invoicing details have been added, the contractor will then have to click on **“Submit”** to mark the job has complete - the issue status will automatically update to **“Job completed, awaiting feedback”**

IS4185111 Boiler not working (Gas Boiler)

Print job sheet

Report another issue

Fixflo House, 9 Larcom Street, LONDON, SE17 1RT

Job completed, awaiting feedback

Assigned to: CS Lettings (charliefixflo+cslet@gmail.com)


Next steps

Detail

Comments

Appointments

Occupier



Mr Steve Jobless
(juwonfixflo+sj@gmail.com)
juwonfixflo+sj@gmail.com
01702 558284

Information

- A works authorisation limit of £500.00 was set against this job
- Issue priority 1 - Urgent (high)

Job completed, awaiting feedback

Current state

- You marked this job as completed on Mon, 28 September 2020
- The occupier may provide feedback until Mon, 05 October 2020

Quote for further works

Job costs and invoices

Recreate Invoice

Job completion details

Undo job complete

Next step



You currently have no actions

Capturing occupier feedback

Once a job has been marked as complete by a contractor, depending on the settings, the status should change to **“Job complete, awaiting feedback”**.

The occupier will receive an email notification asking for feedback about whether the job has been completed or not. Depending on the settings, the occupier is given a certain number of days to give feedback, and if not the issue will revert back to the agent, to take action on the occupier's behalf and close down the issue.

In the 'Next Steps' tab, you will be able to see that the issue is waiting on the tenant. They will be able to login to their occupier portal and provide you with feedback.

IS4185111 Boiler not working (Gas Boiler)

Fixflo House, 9 Larcom Street, LONDON, SE17 1RT

Job completed, awaiting feedback

Assigned to: CS Lettings (charliefixflo+cs)

Next steps

Detail

Comments

Appointments

Feedback

Related

Reminder date Mon 05 Oct 6

Waiting for

Agent

Occupier

Occupiers (other)

They get asked the below question:

Is the issue now resolved?

Yes
 No

**Please note that this question is asked per visit. The agency may already be aware that further works are required*

If they select 'Yes' the following additional questions appear:

Is the issue now resolved?

☒ Yes ☐ No

**Please note that this question is asked per visit. The agency may already be aware that further works are required*

Please review the contractor for their recent visit



Additional Information

Was the request for repair acknowledged in good time

☐ Yes ☐ No ☒ N/A

Overall, how would you rate our repair service



If they select 'No' the below questions appear:

Is the issue now resolved?

☐ Yes ☒ No

**Please note that this question is asked per visit. The agency may already be aware that further works are required*

Why do you not consider the issue resolved?

☐ Contractor did not attend ☐ Work provided was unsatisfactory ☐ Further work is needed ☐ Other

Additional information

1000 characters remaining

If the occupier does select No, the status will change to 'Occupier negative feedback' and revert to the PM to follow up on this.

Each contractor also has a 'Reviews' tab on their profile and you can see occupier ratings for specific contractors:

Profile Invoicing Certification Issues Notifications Availability Calendar Agreements Events Reviews

Agent reviews Occupier reviews Landlord reviews External user reviews

Date reviewed	Issue title	Occupier name	Score	Text
11/05/2020	Boiler not working (Electric Bo...	Mr Clark Kent (Juwonfixflo+zx@gmail.com)	★★★★★	
18/05/2020	Boiler not working (Electric Bo...	Jenna Williams (jessica.dubey+jewi@fixflo.com)	★★★★★	The contractor came in good time, was polite and cleared up after himself

Closing down a job

Once the contractor has added their job costs/their invoice and the occupier has provided feedback (or the chosen time given for occupier feedback has elapsed), the status of the issue will change to '**Job completed, ready for closure**'.

You will be able to view all job completion details under the '**Detail**' tab and on the '**Next Steps**' screen.

You can then choose to close the job by selecting '**Close issue**'.

Job completed, ready for closure

Next step

Current state

- The contractor marked this job complete on Wed, 30 September 2020
- Invoice documents have been submitted
- An invoice and costs are expected to be attached to this issue but the information has not been completed
- The occupier has accepted this job as complete

Undo job complete
 Job completion details
 Job costs and invoices
 Cancel job
 Review feedback

Actions

- The issue may now be closed

Close issue

You will need to select a reason why the job is being closed, provide notes if you wish and rate the contractor. Additionally, you can send an FYI to a contractor, occupier and/or landlord to let them know that the works have been completed.

Close issue

Close reason

Select your close reason

Works completed

*Works have been undertaken by a contractor and the issue is now resolved.

Close reason notes

Everything completed and positive feedback from the occupier.

*These are public and can be seen by other users
938 characters remaining

Send FYI to any of the following

Send FYI to ☐ Occupier ☐ Landlord ☐ Contractor

☐ laurenfixflo+accounts@gmail.com

*Please note - the full issue report will be sent to this email address - this will include private notes, comments and quotes.

Contractor Rating

Rating 

Feedback Quick and easy to work with.

1972 characters remaining

Forward contractor invoice to any of the following

[✓ Close issue](#) [✕ Cancel](#)

The job is now closed:

IS4185111 Boiler not working (Gas Boiler) | [Actions](#)
 Fixflo House, 9 Larcum Street, LONDON, SE17 1RT
 Closed. Works completed Assigned to: CS Lettings (charliefixflo+cslet@gmail.com)





[Next steps](#) [Detail](#) [Comments](#) [Appointments](#) [Feedback](#) [Related](#) [Documents](#) [Assignment](#) [Audit](#)



Works finished


Started date: Wed, 23 September 2020 Closed date: Wed, 30 September 2020 Issue open for: 6 days

Closed. Works completed

Occupier	Occupiers (other)	Landlord	Contractor
 Mr Steve Jobless (juwonfixflo+sj@gmail.com) juwonfixflo+sj@gmail.com 01702 558284		 Ms Jean Smith (charliefixflo+jeansmith@gmail.com) charliefixflo+jeansmith@gmail.com	 West Plumbing (Mr Jamie Ste...) laurenfixflo+jamie@gmail.com 0722334455






How do you request quotes from a contractor(s)?

If you need to request quotes from a contractor or group of contractors, you can use the 'Request quotations' workflow which is available on the next steps screen.

 Next step

Actions

- You should request quotes for the works or award the job to a contractor



	Request landlord advice
	Instruct works
	Request quotations
	Allocate to landlord
	Allocate to external user

You will then be able to enter the following information:

- When you want the quote back by/ how much time are you giving the contractor to provide a quote (mandatory)
- Ideal work completion date
- Any details for the contractor about the quote they are going to be providing
- You can attach any documentation
- Indicate who is paying for the work (it will default to the landlord)

Request quotations

Please choose the date by which the quotes should be sent by the contractors. Once the date has been entered you will be able to invite contractors to quote.


Quotes should be received by	31-10-2020	
Ideal work completion date	14-11-2020	

Quote request details



Please provide a quote for installing a new pipe to prevent future leaks

This is a statement of the works you require from the contractors 3927 characters remaining

Instruction documents


Click to upload

For example, provide a work order for site specific information

 Close  Proceed to next step

You will then be able to select the contractor(s) you want quotes from. Please select as many contractors as required - they will appear at the bottom as a list of your selected contractors. Click **'Proceed to Next Step'** to automatically notify these contractors.

Invite contractors

	Contractor details	Rating
<input type="checkbox"/>	Pest control RS Appliances (Mr Rick Stein) - (5 miles) Email: laurenfixflo+rick@gmail.com, Tel1: 0723423423 34 Hannell Road, LONDON, SW6 7RB Appliances	 ★★☆☆☆ 0
<input type="checkbox"/>	Lawson's Lawns Lawson's Lawns (Miss Nigella Lawson) - (5 miles) Email: laurenfixflo+nigella@gmail.com, Tel1: 0789346723 87 Fulham Palace Road, LONDON, W6 8JA Gardening, Tree surgeon	 ★★☆☆☆ 0
<input type="checkbox"/>	Gus' Chimney Sweeps Gus' Chimney Sweeps (Mr Gustavo Fring) - (29 miles) Email: juwonfixflo+gf@gmail.com, Tel1: 01234589665 12 St. Marys Road, BENFLEET, SS7 1NR Chimney Sweep	 ★★☆☆☆ 0

Your selected contractors:

<input checked="" type="checkbox"/>	West Plumbing West Plumbing (Mr Jamie Stevens) - (5 miles) Email: laurenfixflo+jamie@gmail.com, Tel1: 0722334455 2 Crabtree Lane, LONDON, SW6 6LN	9 ★★★★★ 9
<input checked="" type="checkbox"/>	AH Plumbing & Heating Services AH Plumbing & Heating Services (Mr Ainsley Harriet) - (2 miles) Email: laurenfixflo+ainsley@gmail.com, Tel1: 07234523224 6 Moreton Terrace Mews South, LONDON, S... Gas Safety	5 ★★★★★ 1

+ Close
➔ Proceed to next step

The status of the issue will now change to **'Quotes Requested'** and the next steps lie with the contractors you have requested quotes from.

IS4257999 Mixer tap leaking (Tap) | | Actions ▾

Fixflo House, 9 Larcom Street, LONDON, SE17 1RT

Quotes requested Assigned to: Jessica (jessica.dubey@fixflo.com)

Next steps Detail Comments Appointments Related Documents Assignment Audit

Reminder date Sat 31 Oct 23 Issue priority 3

Agent Occupiers (other) Landlord Contractor Contractor

The contractor(s) will receive a push notification on their phone if they have the mobile app installed, and they will receive an email notification too. This will allow them to see basic information about the job when the quoting period is set to expire and they can then click through to **‘Enter their quotation’** or can **‘Decline to quote’**.

Fixflo

Dear Mr Harriet,

Please quote to resolve this issue.

Mixer tap leaking (Tap)

Ref	IS4257999
Raised	Mon, 05 October 2020 at 16:43
Address	Fixflo House, 9 Larcom Street, LONDON, SE17 1RT
Key reference	CB0089
Current status	Quotes requested
Assigned agent	Jessica (jessica.dubey+fixflo@fixflo.com)
Ideal work completion date	Sat, 14 November 2020

- Quoting is set to end on Sat, 31 October 2020, until then the agent may revise the quote request or terminate quoting early

Enter your quotation

Decline to quote

How do contractors submit quotes?

There are two scenarios:

1. The contractor can provide a quote without going to visit the property
2. The contractor needs to visit the property before providing a quote

A contractor provides a quote without going onsite

They can click through from their email, or notification on the app and then click on 'Quote'.

✓ Quotes requested

➔ Next step

Current state

- Quoting is set to end on Sat, 31 October 2020, until then the agent may revise the quote request or terminate quoting early

↔ Decline to quote

Actions

- Please quote to resolve this issue

➔ Quote

Please note they will also have the option to **'Decline to quote'** and provide you with a reason why.

After clicking on this workflow, the contractor will be able to enter:

1. Lead time required - an indication of how much time in advance they will need
2. Estimated duration of the job
3. Date quote expires - if any
4. Quote detail
5. Quote documents - they can upload a quote document
6. Enter in the costs of the quote

Quotes

Draft - £0.00
ID: QU1881516

+ Add quote

Quote Id

QU1881516

Lead time required

e.g. 1 day or 2 weeks

How much notice would you need?

Est. duration

e.g. 30 mins or 2 hours

How long would it take you?

Date quote expires

Does not expire

When will the quote expire? Leave blank if not applicable

Quote detail

Details of works included in the quote

4000 characters remaining

Quote documents

Close

Decline to quote

✓ Save and submit all

Contractor cost							
Type	Description	Quantity	Unit price £	Net £	Tax £	Total £	
Labour		1	300.00	300.00	60.00	360.00	
<div>+ Add a new row</div>							
					Total Net £	300.00	
					Total Tax £	60.00	
					Total £	360.00	

☒ Save quote draft☒ I agree to the [terms and conditions](#)

Close

Decline to quote

✓ Save and submit all

They will have to agree to our T&Cs and press **'Save and submit all'**. This will then make the quote accessible on the PMs side of Fixflo.

The contractor needs to visit the property before providing a quote

In this instance, either you or the contractor can book in an appointment time. You, the agent, can do this by clicking on the contractor you need to book an appointment for and then click on **'Set appointment date'**.

The screenshot shows the Fixflo interface with a top navigation bar. The 'Waiting for' status is highlighted in orange. Below the navigation bar, the user profile for 'West Plumbing (Mr Jamie Stevens)' is displayed, including contact information. The main content area shows a 'Quotes requested' section with a list of conditions and a 'Next step' section with a 'Quote' button. At the bottom, there are two buttons: 'Decline to quote' and 'Set appointment date', with the latter being highlighted by a red rectangular box.

Agent Occupier Occupiers (other) Landlord **Waiting for** Contractor

West Plumbing (Mr Jamie Stevens)

✉ laurenfixflo+jamie@gmail.com ☎ 0722334455

Quotes requested **Next step**

Current state

- Quoting is set to end on Sat, 31 October 2020, until then the agent may revise the quote request or terminate quoting early
- The occupier has not requested to be present at the property.
- Nobody in the household has been in contact with someone who has tested positive for coronavirus
- Nobody in the household has symptoms of coronavirus
- Nobody in the household is being tested for coronavirus
- Nobody in the household is self-isolating due to potential coronavirus infection

Actions

- Please quote to resolve this issue

Quote

Decline to quote

Set appointment date

You can then specify the time just like you do when instructing works:

Set appointment date

Appointment Date*	<input type="text"/>
Appointment Time	Any
Appointment agreed with occupier	<input type="radio"/> Yes <input checked="" type="radio"/> No


The contractor is also able to follow the process as above and upload/enter in their quotation via the app or the portal.

Entering in quote details on behalf of a contractor

If for any reason you need to enter a quote on behalf of a contractor, you can do this by clicking on their profile and clicking on **'Quote'**.

West Plumbing (Mr Jamie Stevens)

✉ laurenfixflo+jamie@gmail.com ☎ 0722334455

✓ Quotes requested	➔ Next step
Current state <ul style="list-style-type: none"> Quoting is set to end on Sat, 31 October 2020, until then the agent may revise the quote request or terminate quoting early The occupier has not requested to be present at the property. 	Actions <ul style="list-style-type: none"> Please quote to resolve this issue <div>  Quote </div>

This will then bring up the screen just like a contractor sees and you can enter in information on their behalf.

What does the landlord see?

Landlords will sometimes need to log into Fixflo to complete works or help move a reported issue forward. Below you can see how the landlord can log into Fixflo, what the landlord can see once they've entered Fixflo and how they can create an issue themselves.

Issues Screen

Once a landlord has logged into your unique Fixflo site, they will be taken to the issues page. This will show them all the issues they are related to. Similar to agents, a landlord can see the unique IS numbers attached to issues, as well as the issue title and the issue status.

Ref: IS4143543	Boiler not working (Electric Boiler)	Job awarded, awaiting appointment date
Raised: Wed 16 Sep	Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	Awaiting start date, occupier presence requested
Ref: IS4105944	Boiler not working (Electric Boiler)	Awaiting job completion
Raised: Wed 09 Sep	Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	Job started 13 days ago
Ref: IS3513283	In a dry room (Mould appearing)	Awaiting user review
Raised: Wed 08 Apr	Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	

As shown above, there are different sections and stages of an issue that the landlord can check:

Your tasks to do - These are tasks that have been left with the landlord. This can include landlord instructions that need to be given, quotes that the landlord has been sent, or they may need to mark a job as complete.

Jobs awaiting completion - This would be where a landlord would need to mark a job as complete.

In progress - These are issues that are being progressed at the property the landlord is attached to.

Completed - All works that have been completed at the property the landlord is attached to.

Reported by me - Issues raised by the landlord.

Issue Search

Ref:	Issue Description	Status
Ref: IS4185111 Raised: Wed 23 Sep	Boiler not working (Gas Boiler) Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	Job completed, awaiting feedback Job completed 1 day ago
Ref: IS4181609 Raised: Wed 23 Sep	Boiler not working (Electric Boiler) Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	Job completed, ready for closure Job completed 1 day ago
Ref: IS4181521 Raised: Wed 23 Sep	Boiler not working (Electric Boiler) Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	Reported Raised 5 days ago
Ref: IS4180678 Raised: Wed 23 Sep	Boiler not working (Electric Boiler) Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	Job completed, awaiting feedback Job completed 6 days ago
Ref: IS4162811 Raised: Sun 20 Sep	En suite check Fixflo House, 9 Larcom Street, LONDON, SE17 1RT	Reported Raised 8 days ago

Landlords can search issues they are attached to. They can search for the issue via the issue name, address, or the unique issue ID. Landlords are also able to filter searches by clicking on the grey dropdown button. From here they can choose filters such as the status of the issue, the time when the issue was raised as well as the priority level of the issue.

Create Issue

Landlords can also create issues just like an occupier or an agent would. The landlord is able to follow the simple 5 step process in reporting the issue and can report it with or without an associated occupier.

Issue Page

IS3513283 In a dry room (Mould appearing) | Actions

Fixflo House, 9 Larcom Street, LONDON, SE17 1RT

Awaiting user review Assigned to: CS Lettings (charliefixflo+cslet@gmail.com)

Next steps Detail Comments Appointments

✓ Awaiting user review → Next step

Current state

- The agent has asked for approval from a landlord to undertake the works
- 1 quote submitted for review. 0 quotes accepted or declined

Actions

- It has been 132 days since the quote(s) were sent to you for review
- The agent has asked for your approval to undertake the works

Review the quotations

Similar to agents, landlords also have a workflow and tabs which they can follow on an issue's journey to being completed. As mentioned previously the landlord can see the issue status, the address and title of the issue.

The tabs are described below:

Next steps tab - Landlords will always land on the next steps tab when clicking on an issue. This is where an issue is progressed and may vary depending on what option the landlord and agents have chosen.

Detail - All the details regarding the issue will be here. This will include occupier details, the fault detail and media attached to the issue. Landlords will only see the occupier contact information if they have been awarded the job.

Comments - This is where a landlord can communicate with the agent. Landlords can only comment to occupiers if they have been awarded the job. If they message the occupier, the agent will have visibility of that.

Appointments - Any appointments attached to the issue. Landlords can cancel the appointment and also add follow up appointments.

Landlords also can report another issue at the property or view an issue as a PDF by clicking on the 'Actions' button and selecting 'View issue as a PDF':

The screenshot shows the top section of a Fixflo issue page. At the top left, there are navigation links: '< Back', '↑ ↓', and '4 of 4'. Below this, the issue ID 'IS3513283' is followed by the title 'In a dry room (Mould appearing)'. To the right of the title is an 'Actions' dropdown menu. Below the title, the address 'Fixflo House, 9 Larcom Street, LONDON, SE17 1RT' is displayed. Below the address, there is a status 'Awaiting user review' and an assignment 'Assigned to: CS Lettings (charliefixflo+cslet@g)'. The 'Actions' dropdown menu is open, showing two options: 'Report another issue' and 'View issue as PDF'. Below the main content area, there is a blue navigation bar with four tabs: 'Next steps', 'Detail', 'Comments', and 'Appointments'.

How to handle issues where you are waiting on the landlord to get back to you

This situation can arise in two instances:

1. Where you are unsure how to progress an issue and need to get their confirmation of what they want you to do
2. When they are reviewing quotes that you have sent to them and decide if they will proceed with any

Waiting for confirmation on how to progress an issue

To ensure the issue does not sit in the 'Reported' status on your dashboard, you can use the workflow '**Request landlord advice**'.

The screenshot shows the 'Next step' section of a Fixflo issue page. At the top, there is a 'Next step' heading with a right arrow icon. Below this, there is an 'Actions' section. Under 'Actions', there is a bullet point: 'You should request quotes for the works or award the job to a contractor'. Below this, there is a list of five actions, each with a right arrow icon and a blue button: 'Request landlord advice', 'Instruct works', 'Request quotations', 'Allocate to landlord', and 'Allocate to external user'. The 'Request landlord advice' button is highlighted with a red border.

You can provide a note in the recommendation box and press save.

Request landlord advice
×

Request that the landlord review the issue and advise on the course of action they would like the agency to take.

Landlord
Ms Jean Smith (charliefixflo+jeansmith@gmail.com)
Change
View

Agent's advice
Let the landlord know why you need their advice, or what you recommend...

2000 characters remaining

Cancel
Save

Once you have clicked save the status of the issue changes to **'Landlord instructions requested'**.

Fixflo House, 9 Larcom Street, LONDON, SE17 1RT

Landlord instructions requested
Assigned to: Jessica (jessica.dubey+fixflo@fixflo.com)

Next steps
Detail
Comments
Appointments
Related
Documents
Assignment
Audit

Reminder date
Fri 16 Oct
4

Issue priority
3

Waiting for

Agent
Occupier
Occupiers (other)
Landlord
Reporter

If you have not heard back from the landlord or the landlord has replied outside of Fixflo, you can click on their profile and click on advise agency:

Ms Jean Smith (charliefixflo+jeansmith@gmail.com)

charliefixflo+jeansmith@gmail.com

Landlord instructions requested
Next step

Current state

- A new issue has been reported

Actions

- The agency has requested your advice on how to proceed.

Advise agency

You can then indicate what the landlord has recommended/any notes so there is a full audit:

Provide landlord instructions

What would you like the agency to do

- ☐ Proceed with works
- ☐ Request quotes
- ☐ Decline repair request
- ☐ Instruct to landlord
- ☐ Other

Extra information

Let the agency know anything extra about how you would

You will then be able to proceed with the issue.

Waiting for landlords to review quotes

Landlords, like agents, can view quotes from contractors that have been sent over from the agent on Fixflo to review. If this needs to be done outside of the system, you are able to generate the quotes into PDF format to make it easy to send through to them.

For the issue to not sit in the 'Quotes requested' status, it is recommended that you use the '**Quote approval**' workflow to indicate that the quotes have been sent to the landlord.

You can click on '**Request quote approval**' to move the issue forward.

Next step

Actions

- Once you have reviewed the quotes received you can:
 - award the work to the most suitable contractor
 - ask someone to review the quotes
 - extend the quotation period and invite further contractors to quote for the job

Award job

Request quote approval

Select the quotes that are being reviewed, then select landlord from the drop-down, and click proceed to the next step. Don't forget to tick the quote documents box if applicable.

Request approval ×

Select which quotes you would like to submit for review

<input checked="" type="checkbox"/>	QU1891695 £480.00	RS Appliances (Mr Rick Stein) ● Submitted	Details
<input checked="" type="checkbox"/>	QU1891694 £600.00	Gordan's Electrics (Mr Gordan Ramsey) ■ Submitted	Details

Which type of user will be reviewing the quotes*

Landlord

☐ Allow reviewer to see all quote documents

Landlord

Ms Jean Smith (charliefixflo+jeansmith@gmail.com)

Change
 View


Close

Proceed to next step


The status of the issue will change to 'Awaiting user review' and you will see that you are waiting on the landlord before proceeding:

Awaiting user review
Assigned to: CS Lettings (charliefixflo+cslet@gmail.com)


Next steps
Detail
Comments
Appointments
Related
Documents
Assignment
Audit





Reminder date Thu 15 Oct 3





Issue priority 3


 Agent



 Occupier



 Occupiers (other)


 **Waiting for**



 Landlord

The landlord will receive an email asking for their advice on the issue and will then be able to log into Fixflo, with their landlord profile, and let the agency know what they plan to do. Once the landlord has let you know about whether they want to proceed with any quotes, you can click on the 'Waiting for' landlord profile and then select **'Review the quotations.'**



 Agent



 Occupier


 Occupiers (other)

 **Waiting for**



 Landlord



 Contractor


 Contractor

Ms Jean Smith (charliefixflo+jeansmith@gmail.com) 

 charliefixflo+jeansmith@gmail.com

 **Awaiting user review**


 **Next step**

Current state

- The agent has asked for approval from a landlord to undertake the works
- 2 quotes submitted for review. 0 quotes accepted or declined

Actions

- It has been 0 days since the quote(s) were sent to you for review
- The agent has asked for your approval to undertake the works

 **Review the quotations**

You can then accept or reject them based on what the landlord has said and progress accordingly.

Fixflo Statuses

The following is a summary of all the different statuses

Key job statuses:

1. **Reported** - issues that have been reported and have not been progressed
 2. **Awaiting instruction** - an agent has selected the 'Instruct works option, but not yet instructed to a specific contractor
 3. **Awaiting invitation to quote** - an agent has selected the 'Request quotes' option but not yet requested quotes from specific contractors
 4. **Quotes Requested** - a quote has been requested for that job
 5. **Request quotes for ended** - the quotation period that was set has ended OR all quotes that have been requested have been supplied
 6. **Awaiting user review** - the quote has been sent through to a PM, external user or landlord to approve and is waiting on them for additional feedback
 7. **The quote has been reviewed by external user** - the job is ready to be reviewed by the contractor management team
 8. **Awaiting appointment date** - At this point, the job has been instructed to a contractor and the contractor team are waiting on them to provide an appointment time and date for the job
 9. **Awaiting job completion** - When you are waiting for the contractor to go on-site and complete the job. A contractor needs to upload completion details to progress the issue.
 10. **Job completed, awaiting feedback** - The job has been marked as completed by the contractor and the occupier has been sent a feedback email
 11. **Job completed, occupier declined** - The occupier has provided feedback that the job is not complete
 12. **Job completed, awaiting contractor information** - The job has been marked as complete and an invoice has been marked as required but has not been added
 13. **Job completed, ready for closure** - The job is complete. No information or feedback is outstanding. The job can be closed down
-