



Valuation Services Client Portal

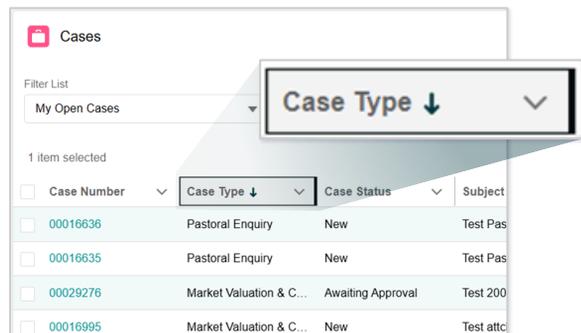
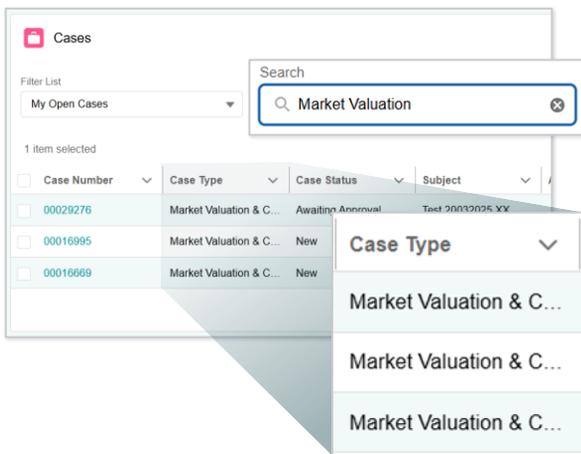
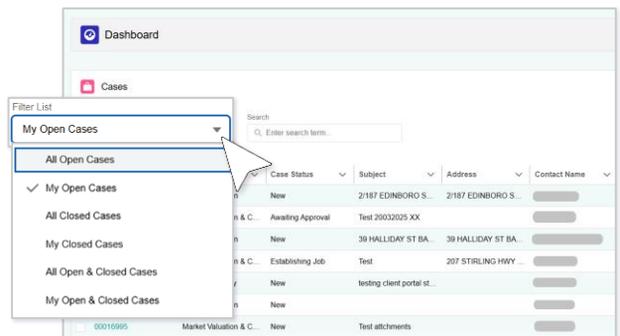
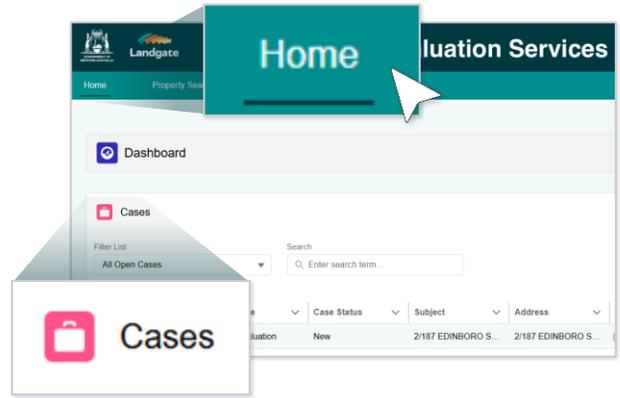
Managing Cases

What is covered in this quick reference guide?

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Using the Cases Table

- 1 Navigate to the **Home dashboard** by clicking on the **Home tab**. The Cases table is at the top of the Home dashboard.
 - 2 Use the **Filter List** field to filter the table by **Open** and **Closed cases**, as well as **your cases** and **all cases** across your organisation.
- Note:** Cases marked as **Restricted View** will **only be visible by the case's contact** and your organisation's **administrators**.

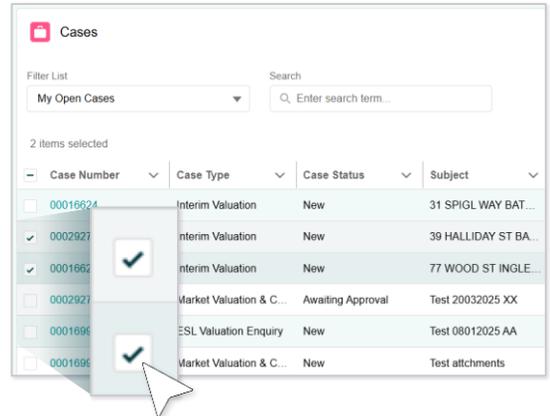


- 3 Enter a **search term** into the **Search** field to search by any cell in the table.

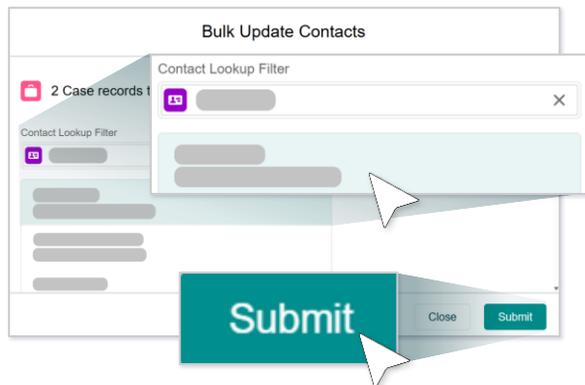
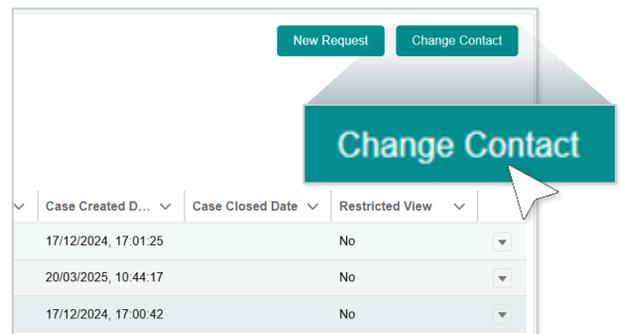
- 4 **Sort by a column** in the Cases table by hovering over a column's header and clicking on the **black arrow** that appears.

Change Case Contact

1 Select the cases you would like to change the contact for using the select checkboxes.



2 Click on **Change Contact**.



3 Search for and **select the contact** you would like for the selected cases.

Note: This will list **all users with access** to the **Client Portal** in your organisation.

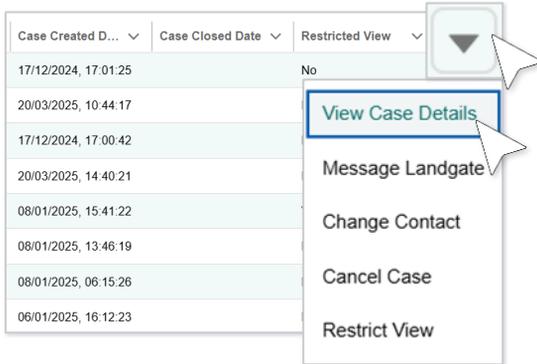
4 Click **Submit**.



5 Click on **OK** to confirm.

Note: **Ownership** of the case, **associated communications** and **quotes** will all transfer to the **new contact**.

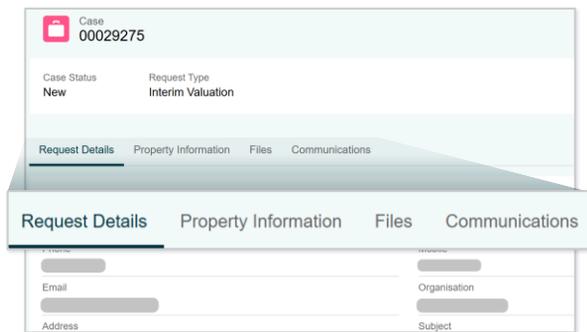
View Case Details



1 In the **Cases table**, click on the **dropdown arrow** next to a case.

2 Select **View Case Details**.

3 **Details** of the case will open in another browser tab, including:



a **Request Details:** General information about the case including case contact details, property Land ID and VEN when the request is initially submitted. This information remains unchanged as the case progresses.

b **Property Information:** More information on the associated property such as the property category.

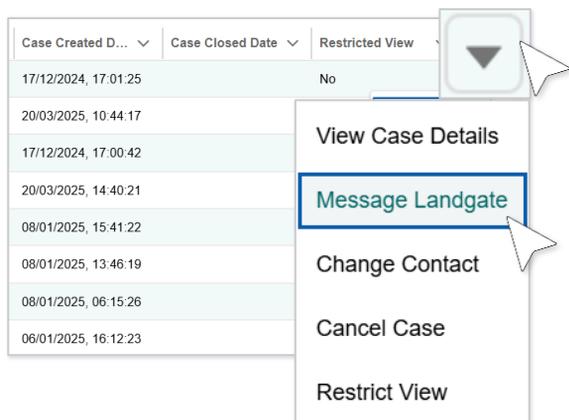
c **Files:** Attachments for the case.

d **Communications:** Messages associated with the case between your organisation and Landgate.

Message Landgate About a Case

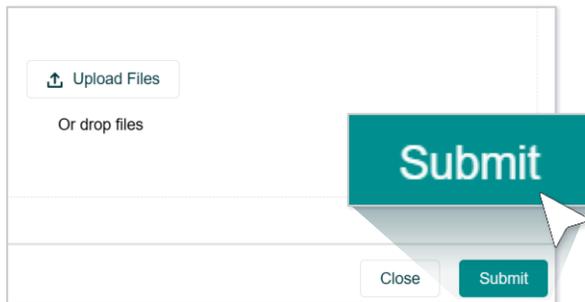
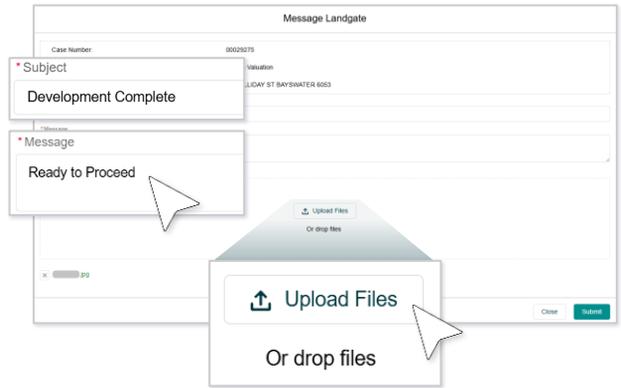
1 In the **Cases table**, click on the **dropdown arrow** next to a case.

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2 Enter a **Subject** and **Message**.

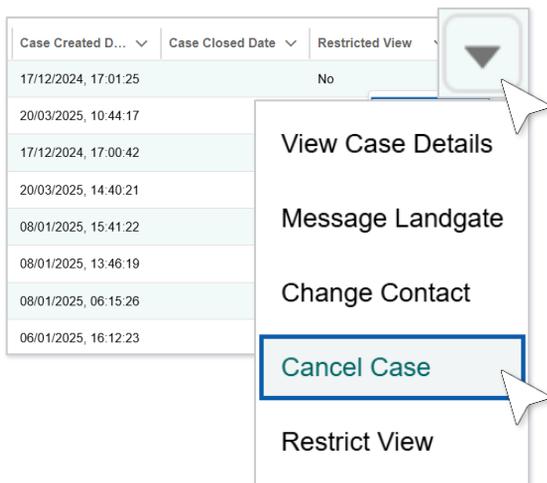
3 Upload any **attachments** using the **Upload Files** button or by **dragging and dropping** files into the window.



4 Click on **Submit**.

Note: The assigned **Case Owner** at Landgate will be **notified** of the message.

Cancel a Case



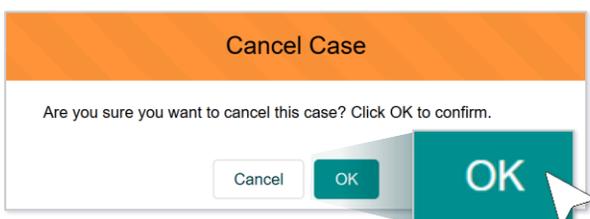
Case Created D...	Case Closed Date	Restricted View
17/12/2024, 17:01:25		No
20/03/2025, 10:44:17		
17/12/2024, 17:00:42		
20/03/2025, 14:40:21		
08/01/2025, 15:41:22		
08/01/2025, 13:46:19		
08/01/2025, 06:15:26		
06/01/2025, 16:12:23		

1 In the **Cases table**, click on the **dropdown arrow** next to a case.

2 Select **Cancel Case**.

Note: **Cancel Case** is only available when the **case status** is **New**. However, if the case has been **progressed by Landgate**, the **Cancel Case** option may not be accessible, even when the status is **New**. In such instances, use the **Message Landgate** action to request cancellation of the case.

3 Click on **OK** to confirm.

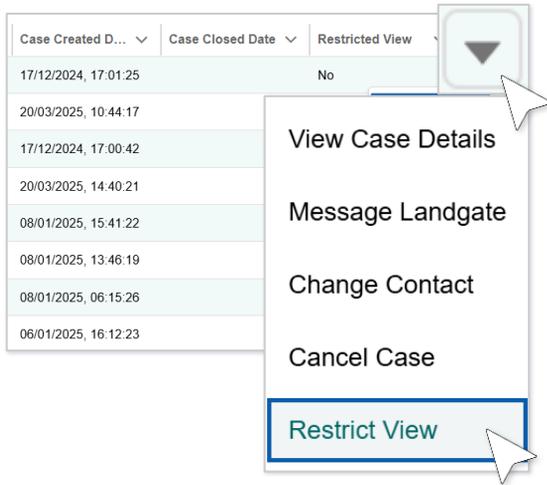


Cancel Case

Are you sure you want to cancel this case? Click OK to confirm.

Cancel OK

Restrict / Unrestrict Visibility of a Case

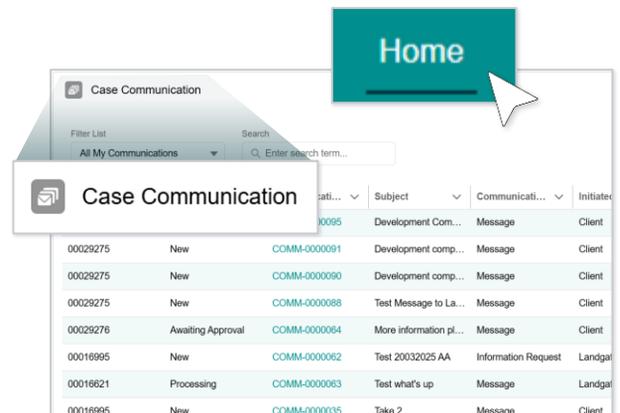


- 1 In the **Cases table**, click on the **dropdown arrow** next to a case.
 - ⚡ **Note:** You will need to be the **case's contact** or an **administrator** to restrict visibility of a case.
- 2 Select **Restrict View**.
- 3 Click on **OK** to confirm. **Visibility** of the case will now be restricted to only the **case contact** and **administrators** in your organisation.
 - ⚡ **Note:** To **unrestrict the visibility** of a case, follow the **same steps** except select **Unrestrict View** in the dropdown menu.

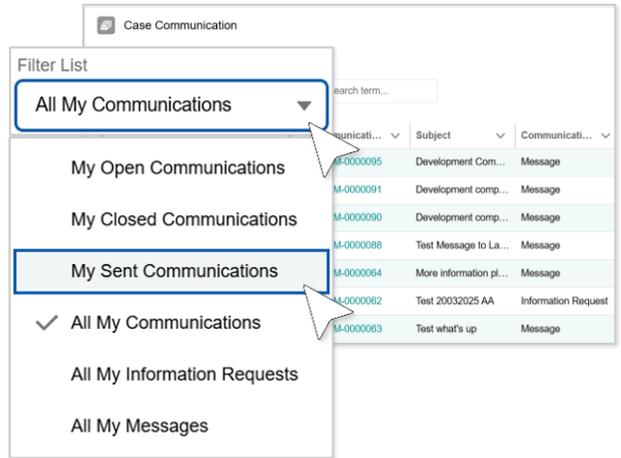
Using the Case Communication Table

- 1 You will find the **Case Communication table** on the **Home dashboard** underneath the **Cases table**. The **default view** will be **My Open Communications**.

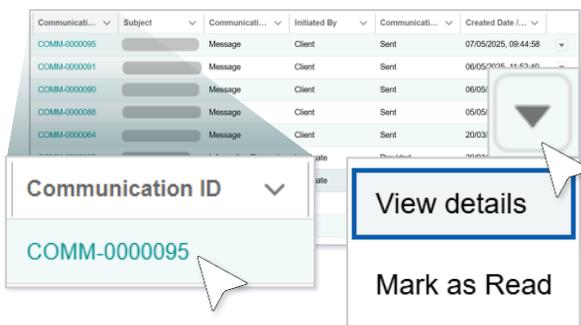
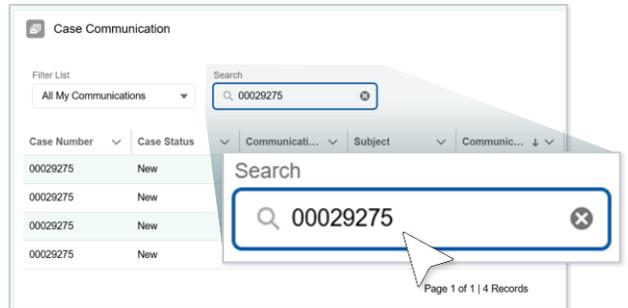
➡ *Continued on the next page...*



2 Use the **Filter List field** to filter the table by different categories including **open**, **closed** and **sent communications**.



3 Enter a **search term** into the **Search field** to search by any cell in the table.



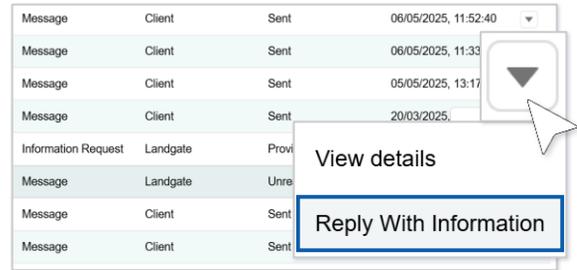
4 To **view the details** of a message either click on the **Communication ID** or click on the **dropdown arrow** next to a communication to **View Details** of a message.

Note: For **messages** received from **Landgate** you will have the option to **Mark as Read**.

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For **information requests** received from **Landgate** you will have the option to **Reply With Information**.



Message	Client	Sent	06/05/2025, 11:52:40
Message	Client	Sent	06/05/2025, 11:33
Message	Client	Sent	05/05/2025, 13:17
Message	Client	Sent	20/03/2025
Information Request	Landgate	Provi	
Message	Landgate	Unre	
Message	Client	Sent	
Message	Client	Sent	

View details

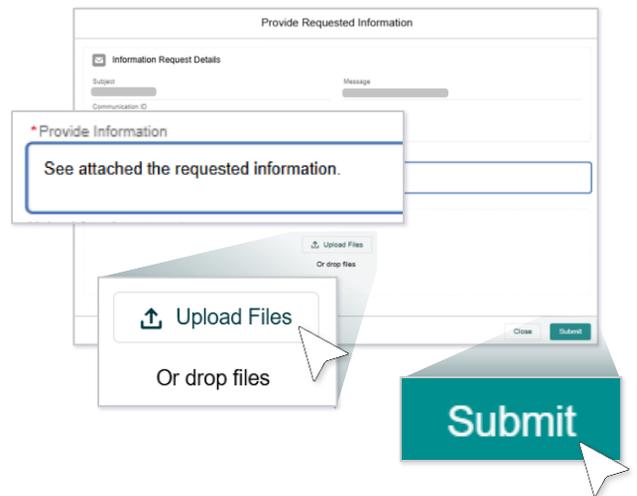
Reply With Information

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Provide the **requested information** using the **text field** and by **attaching any relevant files**, then click **Submit**.



Note: **Messages** that have been marked as **Read** and **information requests** that are marked as **Provided** will be viewable under **My Closed Communications**.



Provide Requested Information

Information Request Details

Subject: _____ Message: _____

Communication ID: _____

* Provide Information

See attached the requested information.

Upload Files
Or drop files

Submit