

Client Portal

Government Agencies Administration and Standard Users



Landgate.wa.gov.au





Table of contents

- 1. Requesting portal access as an external client Slides 3–5
- 2. Managing your profile Slides 6-7
- **3. Client Portal dashboard** Slides 8-34
- 4. Client Portal property search Slides 35-38
- 5. Valuation rolls and other deliverables Slides 39-40
- 6. Client self-administration of users Slides 41-49





Requesting portal access as external client





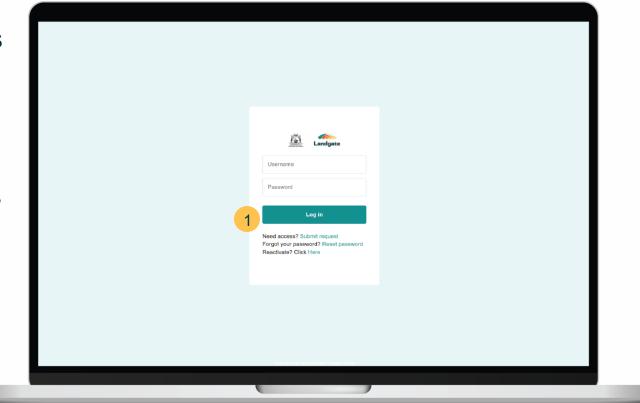
Request access

Your first and fastest option to gain access to the Client Portal is to contact your organisation's Client Portal administrator. Access provisioned by an administrator is immediate.

Alternatively, a person can request access to the Client Portal via the Portal login page. Access is granted within 2 business days.

Click on the "Submit request" hyperlink to launch the form.

The URL is: <u>https://val.clientportal.landgate.wa.gov.au</u> which will be activated post go-live.







Request access form

Complete the fields in the form. Either a Mobile or Phone number must be provided

Select either Standard User or Administrator access:

- Standard User general access to Client Portal functionality
- Administrator elevated access, including user provisioning and account management

 On clicking Submit, the following message -"Your request has been successfully submitted" will appear to the user.

The submitted request is delivered to Valuation Services for review and action.

Valuation Services Client Portal			<u>ـ</u>	۵	<u>م</u>	A	A.	<u>م</u>	A
Access Request									
Please refer to your delegated administrator in your organisation for user access to the Valuation Services Client Portal. Where a delegated administrator is not available, you may request user access through Landgate by completing this form. Your request will be actioned in 2 business days.			1	1		1			
Title									
Select an Option First Name									
*Last Name									
* Email									
Ka 1 1 Mart									
The email address must be an individual's email and not a shared malibox or distribution group.									
*Organisation									
* Phone									
Mobile									
*Access Standard User									
Comments									
A									
I'm not a robot									
Cancel Submit						ļ	ļ		





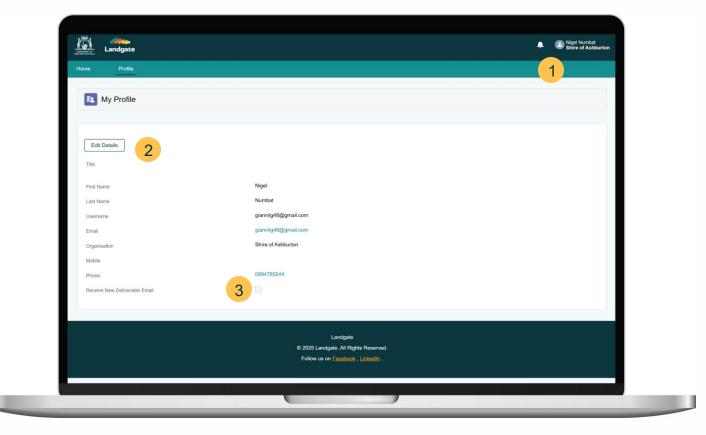
Managing Your Profile





Updating your user profile

- Users can click on their profile, then Settings.
- 2 Users can update their own user profile by selecting Edit Details.
- 3 Users can nominate to receive email notifications when deliverables are loaded by Valuation Services e.g. valuation rolls, other deliverables/reports







Client Portal dashboard





Create new requests

1 At the top of the client portal dashboard is the **New Request** action button.

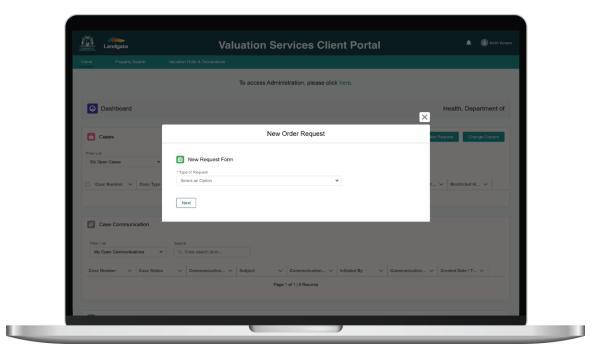
Image: Search Image: Cases Image: Cas	Home Property Search	Valuation Rolls & Deliverables		
Cases Image Contact Image Contact		To access Administr	ation, please click here.	
Fiter Lat Search My Open Cases Enter search term Case Number Case Type Case Status Subject Address Contact Name Case Create Case Closed Restricted Vi Pege 1 of 1 0 Records Fiter List Search My Open Communication Enter search torm Case Number Case Status Communication Subject Communication Initiated By Communication Created Date / T	O Dashboard			Health, Department o
My Open Cases Case Number Case Status Subject Address Contact Name Case Create Case Closed Restricted Vi Page 1 of 1 0 Records 	Cases		1	New Request Change Contact
Page 1 of 1 0 Records Filer List My Open Communications Q. Enter search term Case Number V Communication V Subject V Communication V Initiated By V Communication V Created Date / T V				
Image: Case Communication Filter List My Open Communications Case Number Case Status Case Number Communication v Subject Communication v Initiated By V Communication v Subject V Communication v	Case Number V Case Typ	e V Case Status V Subject V Address	✓ Contact Name ✓ Case Create ✓ Case	Closed V Restricted Vi V
Filter List Bearch My Open Communications Q. Enter search term Case Number V Case Status V Communication V Subject V Communication V Initiated By V Communication V Created Date / T V		Page 1 o	f 1 0 Records	
My Open Communications Q. Enter search term Case Number Case Status Communication v Subject Communication v Initiated By Communication v Created Date / T v	Case Communication			
Page 1 of 1 0 Records	Case Number V Case Sta			on V Created Date / T V
		Page 1 c	f 1 0 Records	

Create new requests

User will then be presented with the **New Request Form** drop down.

Make the relevant selection. The list that you see in the screenshot may not all be relevant for your agency. Only applicable options will be viewable.

Agencies that regularly provide data files to Valuation Services will be have the "Data File Upload" form to upload these files.







Request forms may ask for an Address/VEN to identify the associated property that the request relates to. Type in the address or VEN and you will be provided with matched results for selection.

The inclusion of an Address/VEN will ensure that actions are completed on the relevant property.

lome Property	Search	New Order Request			
O Dashboard	I	Interim Valuation First Name		Water C	corporation
Cases		Fred		lew Request Cha	inge Contact
0		Last Name			
Filter List		Fryer			
My Open Cases	Ŧ	Contact Email			
		giannilg617@gmail.com			
Case Number V	Case Type	Phone		1 V Restricted V	i ¥
	Data File Up	0846456455		No	
	ESL Valuation	Mobile 0 446545454		No	•
	Market Valu			No	
00016974	General End	Organisation Water Corporation		No	
	General En	Address / VEN Search Go to Property Search	1	No	
	Market Valu	Address / VEN Search Go to Property Search		No	
		Q. Start typing an address or VEN.			
00016636	Pastoral En	Property Land ID		No	
	Pastoral En			No	-
00016624	Interim Valu	Urban/Rural		No	
	Interim Valu	Valuation Type		No	•
		Page 1 of 2 11 Records			
		Page 1 of 2 11 Records >			



Create new requests - advanced property search

- If a target property cannot be identified using an address or VEN, the user has the option to conduct a form-based general search via the Go to Property Search link.
- Prom the search results, you can click the drop down and select "Create New Request". The relevant form can then be selected and completed.
- 3 Help tip: when entering the Street Name, do not enter the street type in full e.g. Road. Either enter the abbreviation (e.g. Rd) or no street type.

Landgate	١	/aluation Services	Client Porta	ıl	📮 🔝 Keith Keep
Home Property Search	Valuation Rolls & Deliverable	IS			
1	Property/Land Map				
	Local Government	Land ID	Admin Area		
	🖪 Karratha	×			
	Street No. From Street N		Certificate of Title	0	
		Select Land Type	•		
3	Street Name		Owner Name		
	Suburb				
	Search Clear All	Property Land			
	Search Results				
	VEN VLot Nu V	Address 🗸	VEN A V Primar V	✓ U/R ✓	
	75 L2	35 SEARIPPLE RD KARRATHA 6714	1.6266 Ha 2D69927	Urban	
	185 L4228	TEESDALE PL KARRATHA 6714	1,128 m² T368/4228	Create New Request	2
	198 L1067	L1067 KING WAY KARRATHA 6714	4,694 m² T368/1067	Urban 💌	2
	199 L1068	1068 KING WAY KARRATHA INDUSTRIAL ES	5,774 m ² 1068P2117	44 Urban 💌	
	200 L1072	L1072 CHERRATTA RD KARRATHA INDUST			
	205 L3911	3911 COOLAWANYAH RD KARRATHA INDU	8,025 m ² 3911P1872		
	227 L3799	4 RANKIN RD GAP RIDGE 6714	6.0000 Ha 3799P1851	Urban 🔻	





Cases

1 The top section of the **Home Dashboard** displays the open cases for the client user. This is the default view.

Home Property Search	Valuation Rolls & Deliverables		
	To acc	cess Administration, please click here.	
O Dashboard			Health, Department of
Cases 1			New Request Change Contact
Filter List My Open Cases	C Enter search term		
Case Number 🗸 Case Type	e → Case Status → Subject	✓ Address ✓ Contact Name ✓ Case Create ✓	Case Closed 🗸 Restricted Vi 🗸
00029571 General Er	nquiry New Test	Keith Keeper 20/05/2025, 10:20	No
		Page 1 of 1 1 Records	
Case Communication			
Filter List My Open Communications	Search Q Enter search term		
Case Number V Case Statu	us ~ Communication ~ Subject	✓ Communication ✓ Initiated By ✓ Comm	nunication V Created Date / T V
		Page 1 of 1 0 Records	





Cases

- Filter lists and search function are available to locate a case. This includes viewing all cases submitted by users at your organisation.
- 2 Cases that are marked as Restricted View can only be seen by the contact owner and administrators.

me Property Search	Valuation Rolls & Deliverable	85			
		To access Admini	stration, please click here.		
O Dashboard					Health, Department of
Cases					New Request Change Contact
Filter List	Search				
My Open Cases 👻	 C. Enter search term 				
All Open Cases					
My Open Cases	✓ Case Status ✓	Subject V Addre	ss 🗸 Contact Name 🗸	Case Create 🗸 Case Clos	
All Closed Cases	uiry New	Test	Keith Keeper	20/05/2025, 10:20	№ 2
My Closed Cases		Page	1 of 1 1 Records		
All Open & Closed Cases					
My Open & Closed Cases					
Case Communication					
Filter List	Search				
My Open Communications	 Enter search term 				
		1			
Case Number 🗸 Case Statu	us ~ Communication.	V Subject V	Communication V Initiated	d By V Communication	✓ Created Date / T ✓
		Page	1 of 1 0 Records		





Cases – actions menu

- 1 On the right side of the case table is an **actions menu**. The actions that can be taken for a case are:
 - View case details (users can also click on the Case Number link)
 - Message Landgate
 - Change the contact
 - Cancel the case
 - Restrict the case view

ome Property Search	Valuation Rolls & Deliverables		
	To access	s Administration, please click here.	
O Dashboard			Health, Department of
Cases			New Request Change Contact
-			View Case Details
Filter List My Open Cases	Search		
wy open cases +			Message Landgate Change Contact
Case Number V Case Type	✓ Case Status ✓ Subject ✓	✓ Address ✓ Contact Name ✓ Case Create	
00029571 General Enqu	uiry New Test	Keith Keeper 20/05/2025, 10	20 No Restrict View
		Page 1 of 1 1 Records	
Case Communication			
Filter List	Search		
My Open Communications	Q. Enter search term		
Case Number V Case Status	✓ Communication ✓ Subject	✓ Communication ✓ Initiated By ✓	Communication V Created Date / T V
		Page 1 of 1 0 Records	





Cases – message Landgate

For open cases, users can message Landgate within the context of a case, by selecting this item in the action menu, completing the form and clicking Submit. Files can be attached with the message.

The case owner at Landgate will directly receive the message and reply/action as required.

			×
		Message Landgate	
O Dashboard	Case Number:	00029571	alth, Department of
	Case Type:	General Enquiry	
_	Case Subject:	Test	
Cases	* Subject		Change Contact
Filter List			
My Open Cases	*Message		
Case Number 🗸	Upload Attachments		testricted Vi V
00029571			lo
		▲ Upload Files	
		Or drop files	
Case Communica			
Case Communica			
Filter List			
My Open Communicatio			Close Submit
Case Number 🗸 🤇	Case Status V Communication	V Subject V Communication V Initiated By V Comm	nunication V Created Date / T V





Cases – view messages

 Sent and received messages will be visible in the Case Communication section of the Dashboard.

Filter List	nunication	Search						
All My Communie		Q, Enter search term				1	1	
Case Number	Case Status	Communication V	Subject V Required info by 4/3/	Communication V	Initiated By V	Communication V	Created Date / T ~ 04/02/2025, 09:40:24	
00020226	New	COMM-0000045	Subject M 04022025	Message	Client	Sent	04/02/2025, 14:35:07	
00020225	Processing	COMM-0000043	Subj Test 04022025 AA		Landgate	Provided	04/02/2025, 13:23:14	-
00020225	Processing	COMM-0000044	Subj Test Client Sent		Client	Sent	04/02/2025, 13:24:05	
00020226	New	COMM-0000041	Progress update please	Message	Client	Sent	04/02/2025, 10:08:00	•
00020226	New	COMM-0000040	Message to request xx	Message	Landgate	Unread	04/02/2025, 10:00:03	
00020226	New	COMM-0000038	Time required	Information Request	Landgate	Provided	04/02/2025, 09:35:30	
00020226	New	COMM-0000036	Please supply buildin	Information Request	Landgate	Provided	03/02/2025, 17:51:20	
Ø Quotes				of 1 8 Records				
Filter List My Quotes Awaiting		Q. Enter search term						
Quote Number	V Quote St		Number V	Case Subject	V Quote Receiv	ed Date v Expi	iration Date 🗸 🗸	





Cases – change contact

- 1 Select cases
- 2 Click the Change Contact button to update the contact for multiple cases.

Home Prope	ty Search	Property Summary	Valuation Schedules	Valuation Rolls & Deliverables	Administration	
O Dashboa	d					Shire of Ashbur
🛅 Cases						New Request Change Contac
Filter List		Search				
All Open Cases	*	Q, Enter search term	h			
2 items selected						
Case Number	✓ Case Type	✓ Case Status	✓ Subject ✓	Address 🗸 Contact Name	e 🗸 🛛 Case Create 🗸 🗍 Case	e Closed 🗸 Restricted Vi 🗸
✓ 00029307	Interim Valuati	on New	L10374 BALKULI	L10374 BALKULI Nigel Numbat	07/04/2025, 13:27	No
✓ 00028187	Market Valuati	on New	Job: [238604] Tas		24/10/2023, 07:00	No
				Page 1 of 1 2 Records		
Case Comm	unication					
Filter List My Open Commu	nications -	Search Q. Enter search ten	P3			
inf open entitle						
Case Number	∽ Case Status	~ Communicati	ion 🗸 Subject	 ✓ Communication ✓ In 	itiated By v Communica	tion 🗸 Created Date / T 🗸
				Page 1 of 1 0 Records		





Cases – change contact (cont.)

Search and select a new contact. The search will only provide registered users in your organisation.

Reassigning a case to a new contact will ensure that:

- messages are received from Landgate by an active user; and
- the user can follow the progress of the case.

Home Proper	ty Search		Change Contact			
O Dashboar	rd	Case Number:	00016997		Water C	orporation
		Status:	New			
Cases		Case Subject:	Test 08012025 AA		lew Request Cha	nge Contact
Cases		Contact Lookup Filter			iew request	ige Contact
Filter List		Search	Q			
My Open Cases	*	Ditty Kunjukunju				
		dittydomini@gmail.com				
	✓ Case Type	Fred Fryer giannilg617@gmail.com			a V Restricted Vi	
00016997	ESL Valuation	Mike Testeer mike.thanos+wc@gmail.com			No	•
00016995	Market Valu	Percy Pengiun			No	•
00016974	General Enc	giannilg617+03@gmail.com			No	
00016973	General Enc				No	
00016669	Market Valu				No	۲
00016636	Pastoral En				No	¥
00016635	Pastoral En				No	
00016624	Interim Valu				No	¥
00016623	Interim Valu				No	
00016621	Governmen			Close Sub	mit No	
			Page 1 of 1 10 Records			

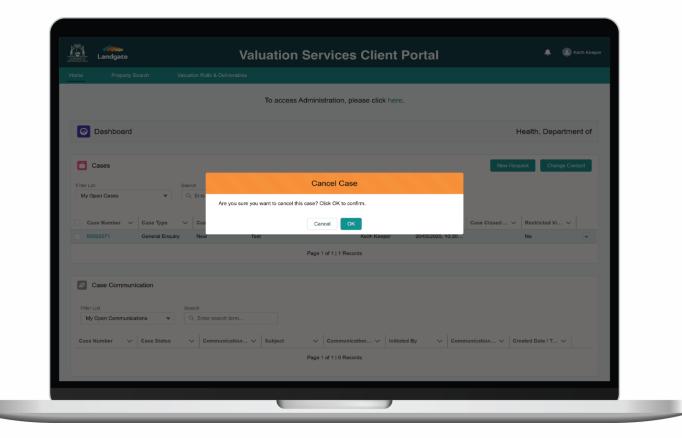




Cases – cancel a case

Selecting the **Cancel Case** action will ask for confirmation from the user.

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. In such instances, use the Message Landgate action to request cancellation of the case.



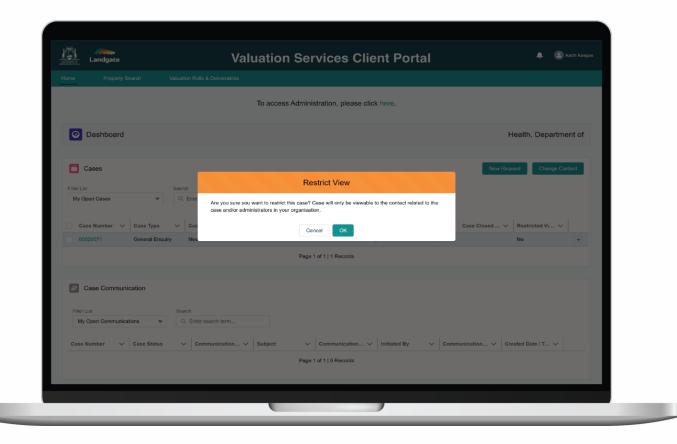




Cases – restrict case view

Selecting **Restrict View** action, will allow users to restrict who can view the case. This will change the visibility of the case so that only the case contact and administrators can see the case in the dashboard.

User will be prompted to proceed with this action.



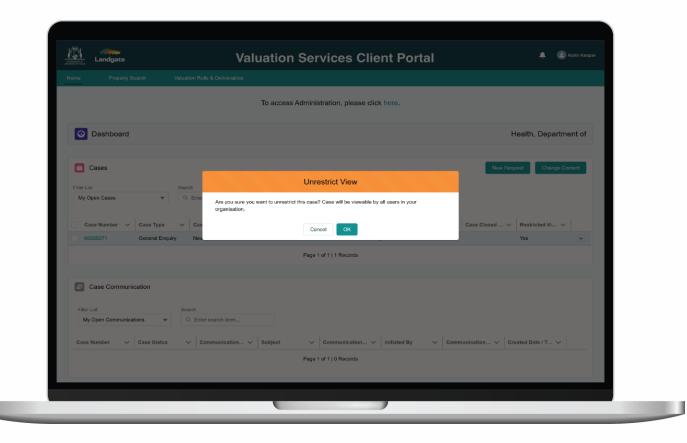




Cases – unrestrict case view

Selecting **Unrestrict View** action will remove the restriction on the case to allow it to be visible to all in the organisation.

This action can be completed by the case contact or administrators. User will be prompted to proceed with this action.





Case Communication

There are two categories for communication:

Messages. General communications between the Client and Landgate as the preferred method to email/phone channels.

Information Requests. Landgate requests the client to provide specific information or artefacts in relation to a case. The case may be placed on hold while awaiting for the information.

Communications sent and received will be visible in the Case Communication section. Filter lists and search function are available to locate a case. The list will default to "My Open Communications"

The case contact will receive an email notification when a message or information request has been received from Landgate.

Filter List	Sea	rch						
All My Communication	ns 💌 C	Enter search term						
Case Number 🗸 🗸	Case Status	Communication V	Subject V	Communication V	Initiated By	Communication V	Created Date / T V	
00020226	New	COMM-0000039	Required info by 4/3/	Information Request	Landgate	Provided	04/02/2025, 09:40:24	
00020226	New	COMM-0000045	Subject M 04022025	Message	Client	Sent	04/02/2025, 14:35:07	
00020225	Processing	COMM-0000043	Subj Test 04022025 AA	Information Request	Landgate	Provided	04/02/2025, 13:23:14	
00020225	Processing	COMM-0000044	Subj Test Client Sent	Message	Client	Sent	04/02/2025, 13:24:05	•
00020226	New	COMM-0000041	Progress update please	Message	Client	Sent	04/02/2025, 10:08:00	•
00020226	New	COMM-0000040	Message to request xx	Message	Landgate	Unread	04/02/2025, 10:00:03	w.
00020226	New	COMM-0000038	Time required	Information Request	Landgate	Provided	04/02/2025, 09:35:30	
00020226	New	COMM-0000036	Please supply buildin	Information Request	Landgate	Provided	03/02/2025, 17:51:20	Y
Quotes Filter List My Quotes Awaiting Apr		Enter search term						
Quote Number	✓ Quote Status	✓ Case N	lumber 🗸	Case Subject	✓ Quote Receiv	ed Date 🗸 Expi	ration Date V	
			Page 1	I of 1 0 Records				





Case Communication

Communications received will also be displayed in the notifications (bell icon) at the top right corner of the dashboard.

Home Property S	earch Valuation Ro	lls & Deliverables					
		To ac	cess Administration, p	lease click here.			
O Dashboard						Health, Depart	tment of
Dashboard						Health, Depart	inent of
Cases						New Request Change	Contact
Filter List	Search						
My Open Cases		r search term					
Case Number 🗸	Case Type 🛛 🗸 Cas	e Status 🗸 Subject	✓ Address ✓	Contact Name 🗸	Case Create 🗸 Case	Closed V Restricted Vi	~
00029571	General Enquiry New	Test		Keith Keeper	20/05/2025, 10:20	Yes	¥
			Page 1 of 1 1 Rec	ords			
Case Communi	ication						
Filter List	Search						
My Open Communica	tions v Q Ente	er search term					
Case Number 🗸 🗸	Case Status 🗸 C	communication 🗸 Subject	t 🗸 Communie	cation 🗸 Initiated E	communicati	ion 🗸 Created Date / T 🗸	-
			Page 1 of 1 0 Rec	ords			





Case Communication – view details

- In the Case Communication list, is an action menu to view the communication details, including attachments. This action is available for all communication types:
 - messages received from Landgate
 - messages sent to Landgate
 - information requests received from Landgate

When a contact has been updated for a case, all communications (open and closed on the case) can be viewed and require action (if needed) by the new contact in the Case Communication list.

									_		
Cases									Ne	w Request Change C	ontact
Filter List	S	Search									
My Open Cases	*	Q, E	Enter search term								
Case Number 🗸 🗸	Case Type	~ 0	Case Status 🗸 🗸	Subject	~ A	ddress 🗸 🗸	Contact Name	e 🗸 🖂 Case Create	V Case Closed	V Restricted Vi V	
00029573	General Enquiry		New	Info required		RENWICK ST		20/05/2025,		No	•
00029572	Market Valuation .		Awaiting Approval	MV on Unit 3			Keith Keeper	20/05/2025,		No	•
00029571	General Enquiry		New	Test	·		Keith Keeper	20/05/2025,		Yes	•
00028371	General Enquiry		VOIV	Test			Keitri Keeper	20/03/2023,	10.20	105	•
Filter List My Open Communica		Search	h Enter search term								
	Case Status	~	Communication			✓ Communic			Communication.	Created Date / T ~ 20/05. View details	
Case Number V	An order of American I		COMM-0000111		view shortly			ndgate	Requested	20/05 New details	ation
00029572	Awaiting Approval		COMM 0000110			Message	Ld	ndgate	Unitedu	20/05	
	Awaiting Approval Awaiting Approval		COMM-0000110								
00029572			COMM-0000110			age 1 of 1 2 Reco	ords				
00029572			COMM-0000110			age 1 of 1 2 Reco	rds				





Case Communication – view details

On clicking View Details for a message or information request from the Case Communication list, the full message will be displayed.

Any attachments included with the message will also be viewable.

					ion Servi							
Home Property Se	arch	Valuation Rolls & D	eliverables									
Communication COMM-000011	1								New Contact	New Note	Edit	¥
Communication Type Information Request	Subject Info neede	d to proceed	Case Number 00029572									
Communication Type						Communication Stat Requested	us					
Initiated By Landgate						Case Number 00029572						
Subject Info needed to proceed						Message or Informat Please provide plat						
Created Date / Time 20/05/2025, 11:30:03						Information Provided		ed property				
Provided Date / Time												
Files												8
Filter List		Search										
Files Provided By Landga	te 🔻	Q. Enter search	h term									
File Name	~	Provided By		~	Date / Time Saved	~	Preview		Download			
					Page 1 of 1	0 Records						
File Name	~	Provided By		~			Preview		Download			





- 1 When a message is received from Landgate and has been read, the case contact can mark the communication as "Mark as Read".
 - This moves the message to the Closed Communications list. This way the user by default only sees what is outstanding in the Open Communications list.

Landgate		Valuation Ser	VICES CHEIR I	ontai	
Home Property Search	Valuation Rolls & Delive	orables			
Case 00029572					
	uest Type rket Valuation & Consultancy				
Request Details Property Inforr	nation Files Communications	<u> </u>			
Case Communication					
Filter List	Search				
All Communications	 Enter search terr 	n			
Communication ID ~	Subject 🗸	Communication Type	Initiated By	Communication Status \sim	Submitted Date / Time 🗸 🗸
COMM-0000111	Info needed to proceed	Information Request	Landgate	Requested	20/07/2025, 11:30:03
COMM-0000110	Will review shortly	Message	Landgate	Unread	5, 11: View details
COMM-0000109	Needed by the xx May	Message	Client	Sent	20/05/2025, 11: Reply With Information
		Page	1 of 1 3 Records		
			Landgate		
		© 2025 Lands	gate. All Rights Reserved.		
		Follow us o	n Eacebook , Linkedin .		



Case Communication – information request received

When an information request has been received from Landgate, the status is marked as **Requested**. In the action menu the case contact is use "Reply With Information" to send the requested information to Landgate.

Clicking "View details" will display the full message and attachments.

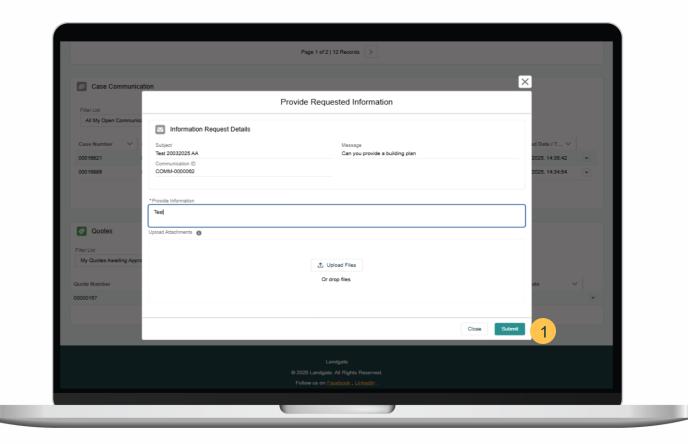
00029348 Interim Valuation Processing 3 KIDMAN AV SO 3 KIDMAN AV SO Betty Boo 1104/2025, 10:13 No • 00029346 Interim Valuation New 24 KENTIA RD W 24 KENTIA RD W Betty Boo 1004/2025, 16:25 No • 00029346 Interim Valuation New 1 CASTON TCE 1 CASTON TCE Betty Boo 1004/2025, 16:25 No • Concessing New 1 CASTON TCE 1 CASTON TCE Betty Boo 1004/2025, 16:25 No • File Case Communication New 1 CASTON TCE 1 CASTON TCE Betty Boo 1004/2025, 16:25 No • File Case Communication New 1 CASTON TCE 1 Caston TCE No • • • • • • • • • No • • • • • • • • No • • No • • • • • • • • • • • • • • • </th <th>00029352</th> <th>Data Enquiny Int -</th> <th>Job Completed S</th> <th>Subi Teat 140420</th> <th>Dott: Dee</th> <th>14/04/2026</th> <th>14/04/2025 42-5</th> <th>0 No</th> <th>•</th>	00029352	Data Enquiny Int -	Job Completed S	Subi Teat 140420	Dott: Dee	14/04/2026	14/04/2025 42-5	0 No	•
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00029345 Inserin Valuation New 1 CASTON TCE 1 CASTON TCE Beity Boo 1004/2025, 18:05 No Image of the second			-						
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Case Communication – reply to information request

On clicking "Reply With Information" to an information request, a prompt will appear to enter the message and attachments (if needed) to be sent to Landgate.

On **Submit**, the status will update to **Provided**. This action will also move the information request to the Closed Communications list. This way the user by default only sees what is outstanding in the Open Communications list.







Quotes

- 1 Quotes received from Landgate will appear in the Quotes list. The list with default to "My Quotes Awaiting Approval".
 - Filter lists and search function are available to locate a quote.
 - Only the case contact can view a quote on a case. The case will need to be reassigned to new case contact for the quote to be viewable by that person.
 - When a contact has been updated for a case, all quotes (outstanding and completed on the case) can be viewed and require action (if needed) by the new contact in the Quotes list.

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Quotes – view details

- From the Quotes list, the case contact can view full details of the quote by clicking "View Quote" to preview the quote document.
 - This action is available for outstanding and completed quotes.

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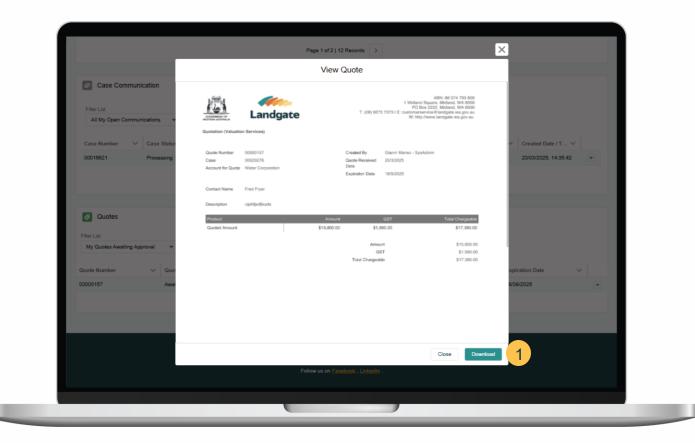




Quotes – download document

Viewing the quote will display a preview of the quote document.

1 Click on "Download" to save a PDF formatted quote to the local drive.







Quotes – complete action

From the Quotes list, the case contact can complete the action to approve or reject the quote.

This action is no longer available if the quote has expired. A quote will expire in 182 days (approx. 6 months). Once expired, the quote will be moved to "My Completed Quotes" with a status of Expired.

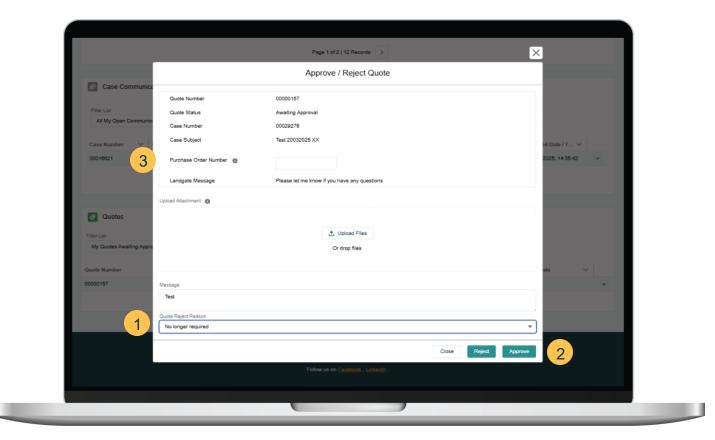
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Quotes – approve/reject

- 1 **Rejecting the quote** will require the user to select a rejection reason. Case will be immediately closed.
- 2 Approving the quote will notify Landgate to action the job required. Progress of the case can be followed by monitoring the case status in the Cases list.
- ³ User can provide the purchase order number and any attachment(s) when submitting an approval.







Client Portal Property Search





Property Search - options

- Clicking on **Property Search** will provide users the ability to search using:
 - Property/Land details
 - A map view

Search results returned and information shown will only be for active VENs.

Property Search can also be accessed by users when they have clicked the **Go to Property Search** link when completing a new request form.

Property Search	Valuation Rolls & Deliverables			
1	Property/Land Map			
	Local Government	Land ID	Admin Area	
	Q. Search Account here			
	Street No.From Street No.To	Land Type	Certificate of Title	
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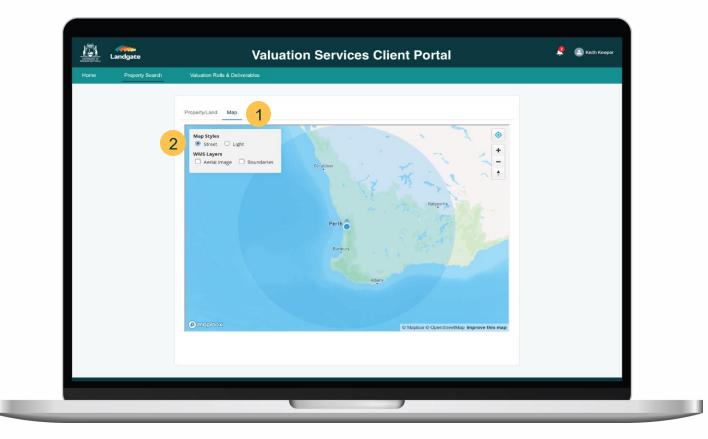


Map search

Users can search using a Map. Navigate to a location and add a pin to a property.

A list of properties associated with the selected point will be displayed in the search results.

- 2 The map can be configured in the following ways:
 - Map style Street or Light
 - WMS Layers Aerial Imagery and/or Cadastre Boundaries (containing street numbers)







Property search results

- Property search results will be ordered by VEN.
- ² On the right side of the table is the **actions menu**.
 - View Property Details this will navigate the user to the Property Summary page to show the details of the selected property
 - Create New Request property details will be populated over to the new request form selected

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Client Portal – Valuation Rolls and Other Deliverables



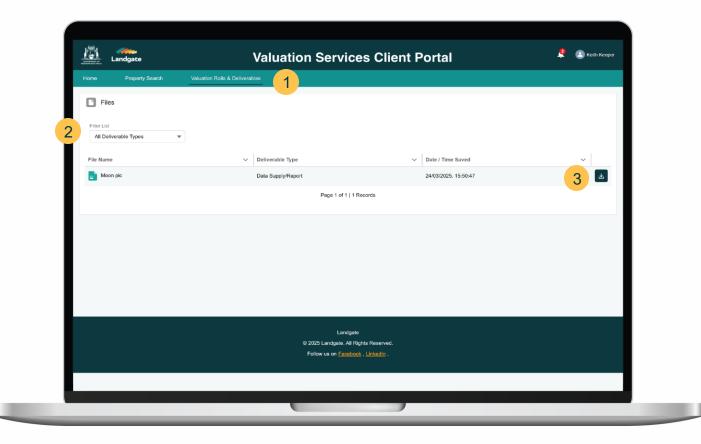


Valuation Rolls & Other Deliverables

- Users can view the list of files uploaded by Landgate for their agency relating to Valuation Rolls and other 'Valuation Services' deliverables.
- Files are categorised by a deliverable type. User can filter on a deliverable type to find a specific file.
- 3 Files can be downloaded by selecting the download button.

Users will receive a notification when a deliverable has been uploaded by Landgate, as long as they have updated their profile to receive these notifications.

Files are archived and no longer viewable online 6 months from the date saved.





Client Portal Government Agencies Administration Users Only



Landgate.wa.gov.au





Administrators – Self-Management of User Profiles





The Role of an Administrator

The role of an administrator is to assist with user access and management for individuals within their agency who require access to the Valuation Services Client Portal. Any actions taken by the administrator are implemented instantly, ensuring both security and efficiency.

Administrative capabilities include:

- Registering and deactivating users
- Updating user profiles and access permissions
- Resetting user passwords and reactivating accounts
- Performing other key administrative tasks to support portal use

Note: Generally, all users can update their own profile, reset their own password or reactivate their account





Number of Administrators

Each agency must maintain **at least two administrators**. You should also consider having administrators that can support specific departments/business teams.

This ensures continuity—if one administrator is unavailable (e.g. due to leave or illness), the other administrators can support users with any required actions, to ensure account access is maintained and up-to-date for your agency.





 Users that have the role of an Administrator will have an Administration option. Clicking on the link will open Administration dashboard.

ome Property S	earch Valuat	ion Rolls & Deliverables	3					
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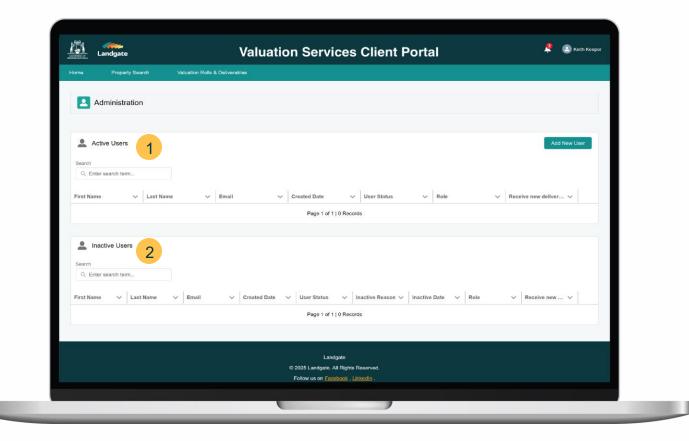


Administration – dashboard

Administrator dashboard displays:

- Active users in the agency
 - Inactive Users in the agency
- Inactive Users have had their account deactivated:
 - due to their account being inactive for 90 days; or
 - by an administrator at the agency or Landgate

Users are prompted at 75 days to maintain their account to ensure their account is not deactivated. Users can also reactivate their own account.







Administration - create a new user

In the Administration dashboard, click Add New User which will launch a pop up form.

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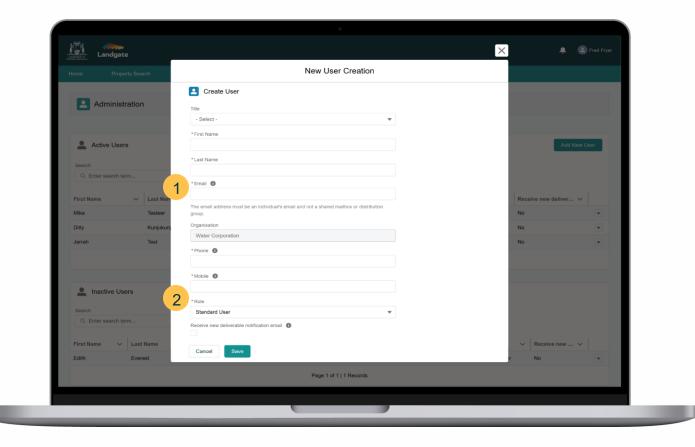




Administration - create a new user

- Administrator enters the details of the new account user.
- The email domain must match the user's organisation. External email addresses, shared mailboxes and distribution groups are not allowed.
 - Duplicate emails are checked automatically.
 - If the user's email exists already in Landgate's CRM but is not a current Client Portal user, a prompt will appear to confirm the details and proceed with granting access to the portal.
- ² The **Role** field is to assign either Standard or Administrator access.

A welcome email is sent to the new user to establish their password.







Administration - edit user accounts

Administrators can maintain user profiles through the action menu.

For Active Users:

- Edit details all user details can be updated except for 'organisation'.
- 2 Reset Password the user will receive an email to start the password update process.
- 3 Deactivate user to prevent the user account being used from logging in to the portal.

For Inactive Users:

4 Activate user – a prompt will appear requesting confirmation that the account is to be reactivated.

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