

# Client Portal

RevenueWA

Administrators and Standard Users



Locate



Value



Secure



Enable



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**Value**

# **Requesting Client Portal Access**



# Request access

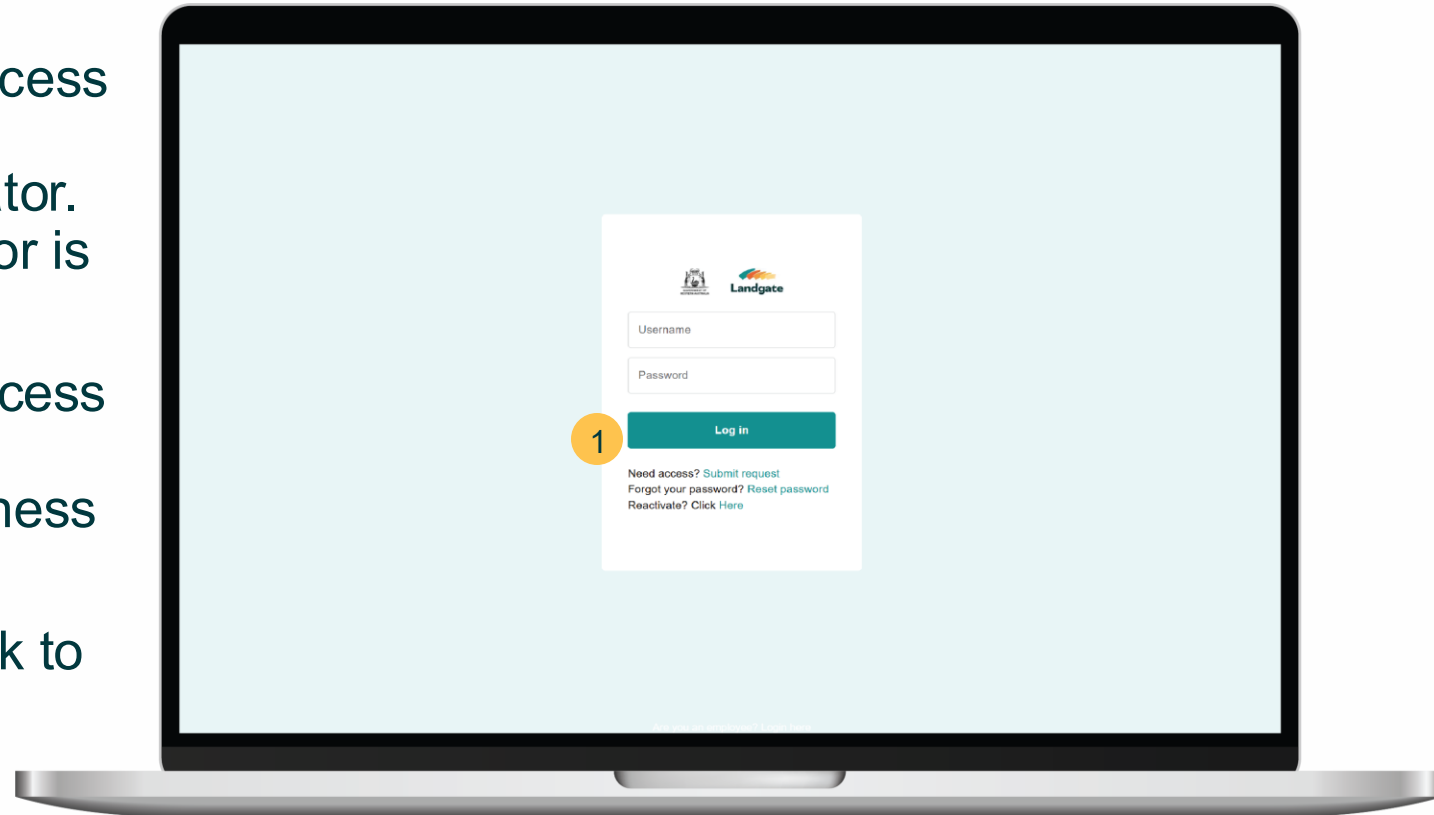
Your first and fastest option to gain access to the Client Portal is to contact your organisation's Client Portal administrator. Access provisioned by an administrator is immediate.

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

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

The URL is:

<https://val.clientportal.landgate.wa.gov.au>  
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

1 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.

The screenshot shows a laptop displaying the 'Valuation Services Client Portal' interface. The main heading is 'Access Request'. Below this is a teal box with white text: '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.' The form fields include: 'Title' (a dropdown menu with 'Select an Option'), 'First Name', 'Last Name', 'Email', 'Organisation', 'Phone', 'Mobile', 'Access' (a dropdown menu with 'Standard User' selected), and 'Comments'. At the bottom, there is a checkbox for 'I'm not a robot' next to a CAPTCHA logo, and two buttons: 'Cancel' and 'Submit'. A yellow circle with the number '1' is overlaid on the 'Submit' button.



**Value**

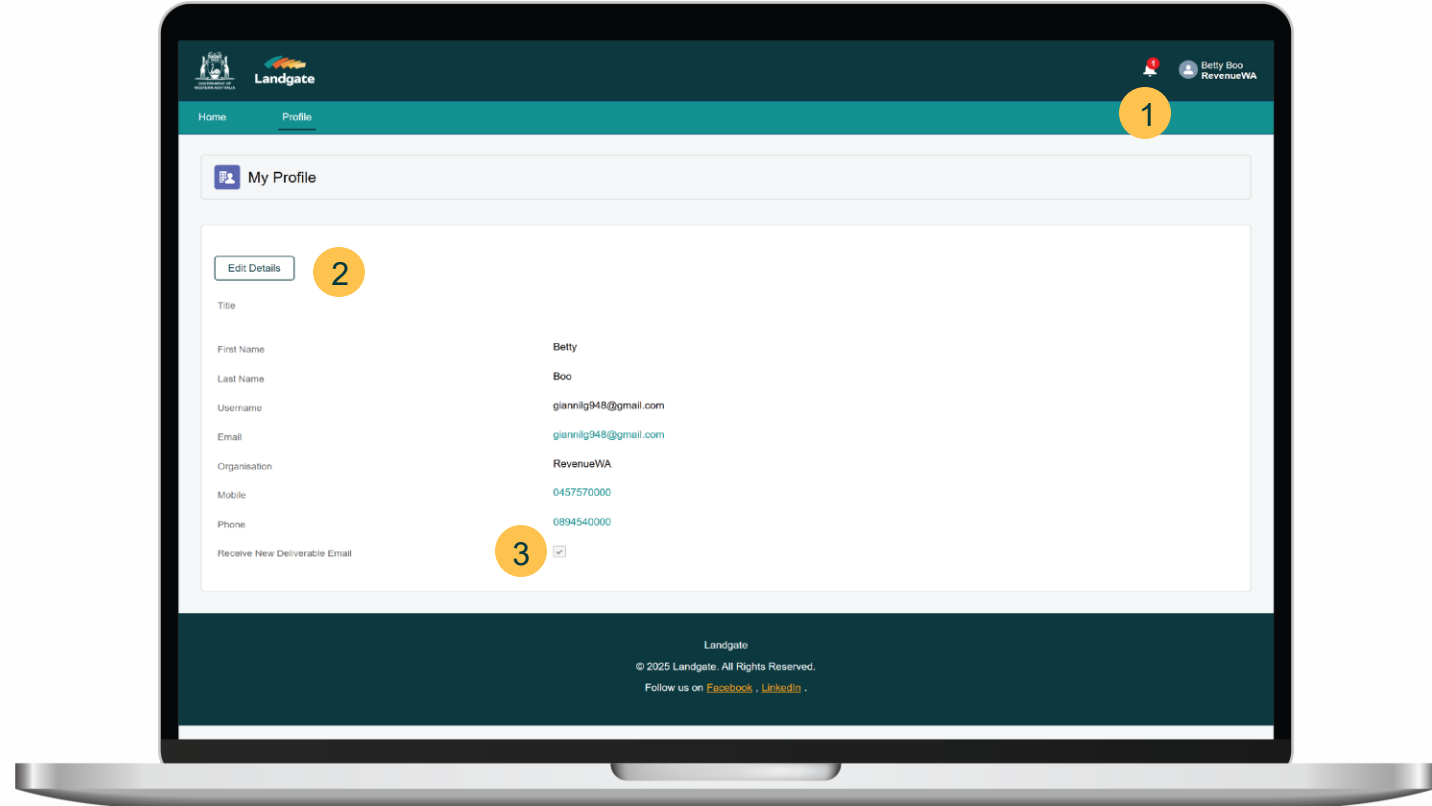
# **Managing Your Profile**



Value

# Updating your user profile

- 1 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.





**Value**

# **Client Portal - Dashboard**

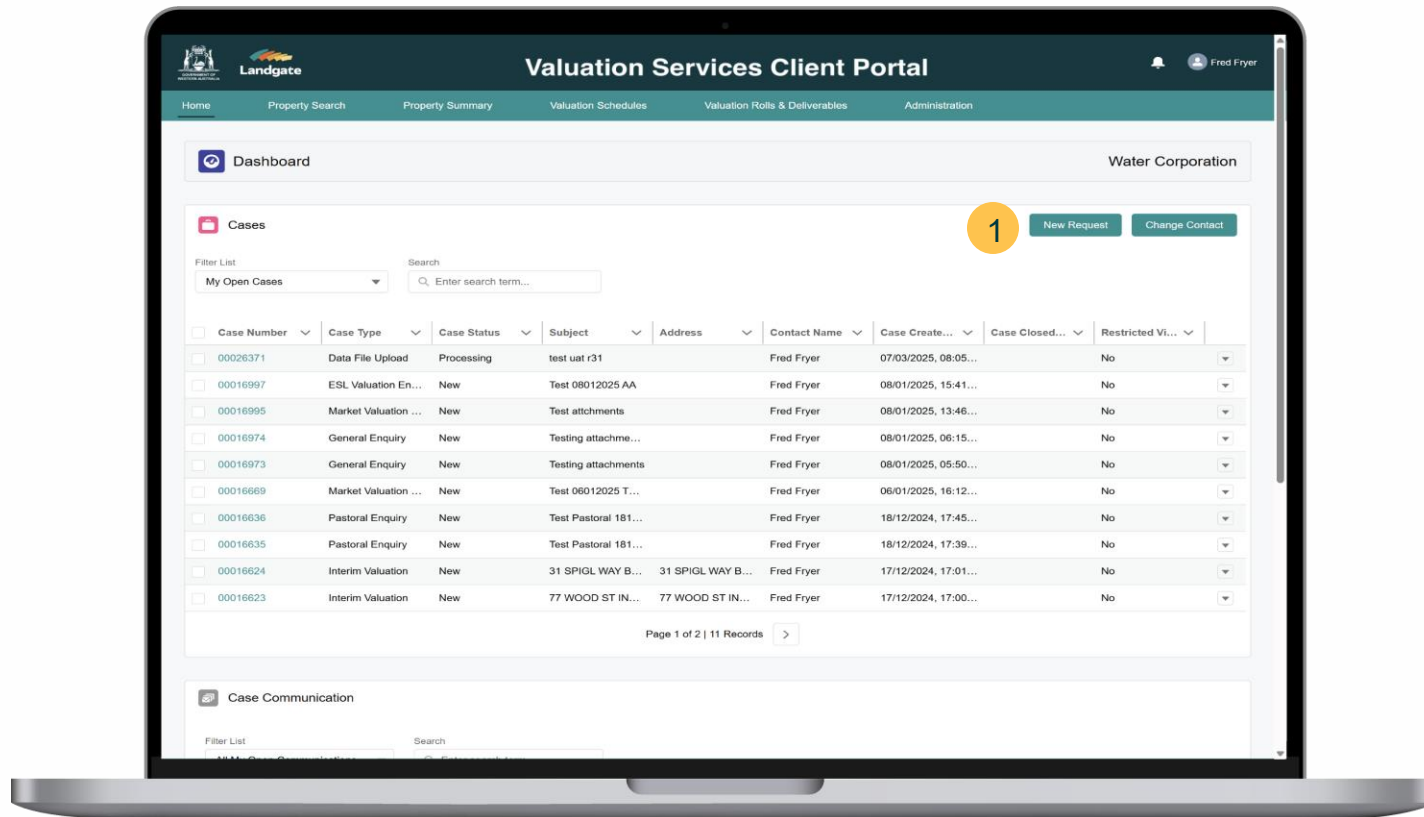




Value

# Create new requests

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





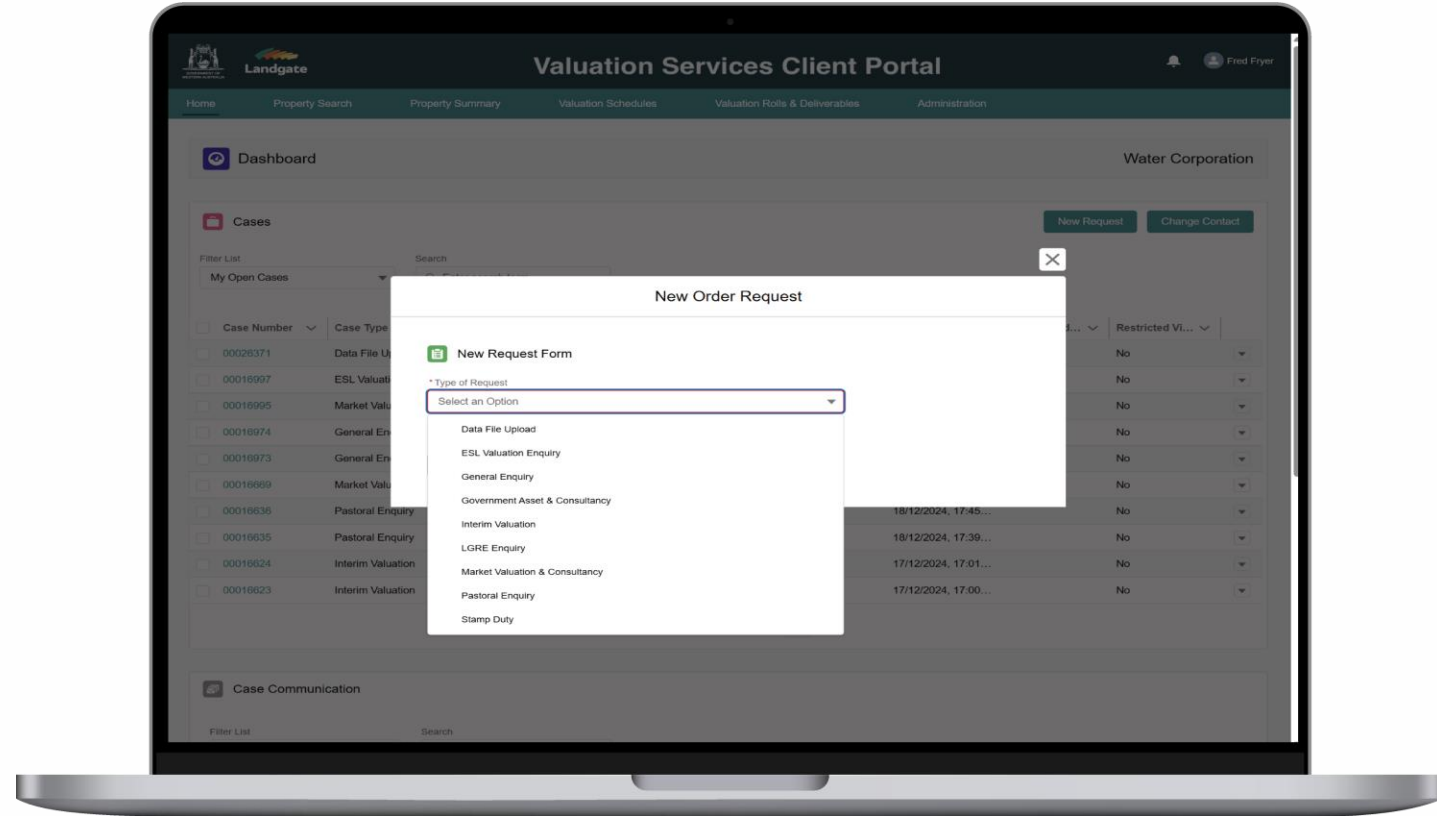
Value

# 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.





# Create new requests - address/VEN search

- 1 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.

The screenshot displays the 'Valuation Services Client Portal' interface. A 'New Order Request' modal is open, showing a form for an 'Interim Valuation'. The form fields are as follows:

- First Name: Fred
- Last Name: Fryer
- Contact Email: glannilg617@gmail.com
- Phone: 0846456455
- Mobile: 0446545454
- Organisation: Water Corporation
- Address / VEN Search: (highlighted with a yellow circle and the number 1)
- Property Land ID: (empty)
- Urban/Rural: (empty)
- Valuation Type: (empty)

The background shows a sidebar with 'Dashboard' and 'Cases' sections, and a main area with a table of cases. The table has columns for 'Case Number' and 'Case Type'.

Case Number	Case Type
00026371	Data File U
00016997	ESL Valuat
00016995	Market Valu
00016974	General En
00016973	General En
00016669	Market Valu
00016636	Pastoral En
00016635	Pastoral En
00016624	Interim Valu
00016623	Interim Valu



# Create new requests - advanced property search

- 1 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.
- 2 From 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.

The screenshot displays the 'Valuation Services Client Portal' interface. The top navigation bar includes links for Home, Property Search, Property Summary, Land Summary, Valuation Rolls & Deliverables, and Valuation Schedules. The main content area is divided into two sections: a search form and a search results table.

**Search Form:** The form is titled 'Property/Land' and includes fields for Local Government (Albany), Land ID, Admin Area, Street No. From, Street No. To, Land Type (Select Land Type), Certificate of Title, Street Name, Owner Name, Suburb, and Rural Ratepayer Name. A 'Search' button is located below the form.

**Search Results:** The results table lists properties with columns for VEN, Lot No., Address, VEN A., Primar..., and U/R. The table contains several rows of data, including properties in Albany, Port Albany, and Mount Melville.

**Annotations:** Numbered callouts 1, 2, and 3 are placed on the screen to guide the user. Callout 1 points to the 'Go to Property Search' link in the top navigation bar. Callout 2 points to the 'Create New Request' button in the search results table. Callout 3 points to the 'Street Name' field in the search form.

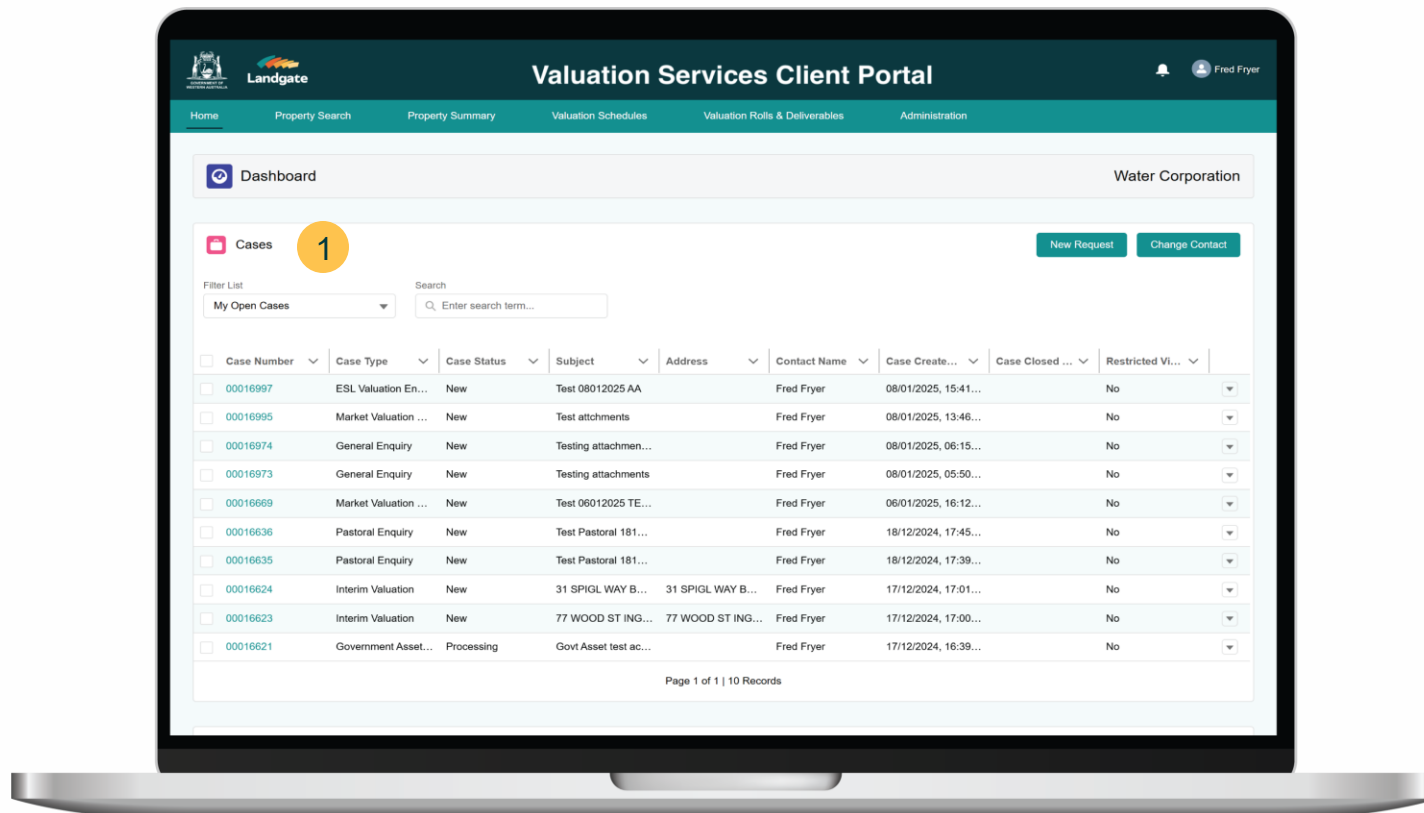
VEN	Lot No.	Address	VEN A.	Primar...	U/R
77	L14	4 ANTHONY RD MILPARA 6330	2,307.0000...	14D40585	Urban
102	L8	17 BURGONYNE RD PORT ALBANY 6330	3,5215 Ha	8D38678	
162	L4880	METTLER 6328	80,9000 Ha	4880P1573...	
174	L45	189 BUSHBY RD LOWER KING 6330	12,5000 Ha	45P3645	Rural
195	L12	11 CHAMPION ST MIRA MAR 6330	1,012.0000...	12P6065	Urban
971	L72	18 LION ST MOUNT MELVILLE 6330	529.0000 m²	72P299	Urban
1121	L5891	1810 TAKENUP RD NAPIER 6330	323.7000 Ha	5891P1658...	Rural



Value

# Cases

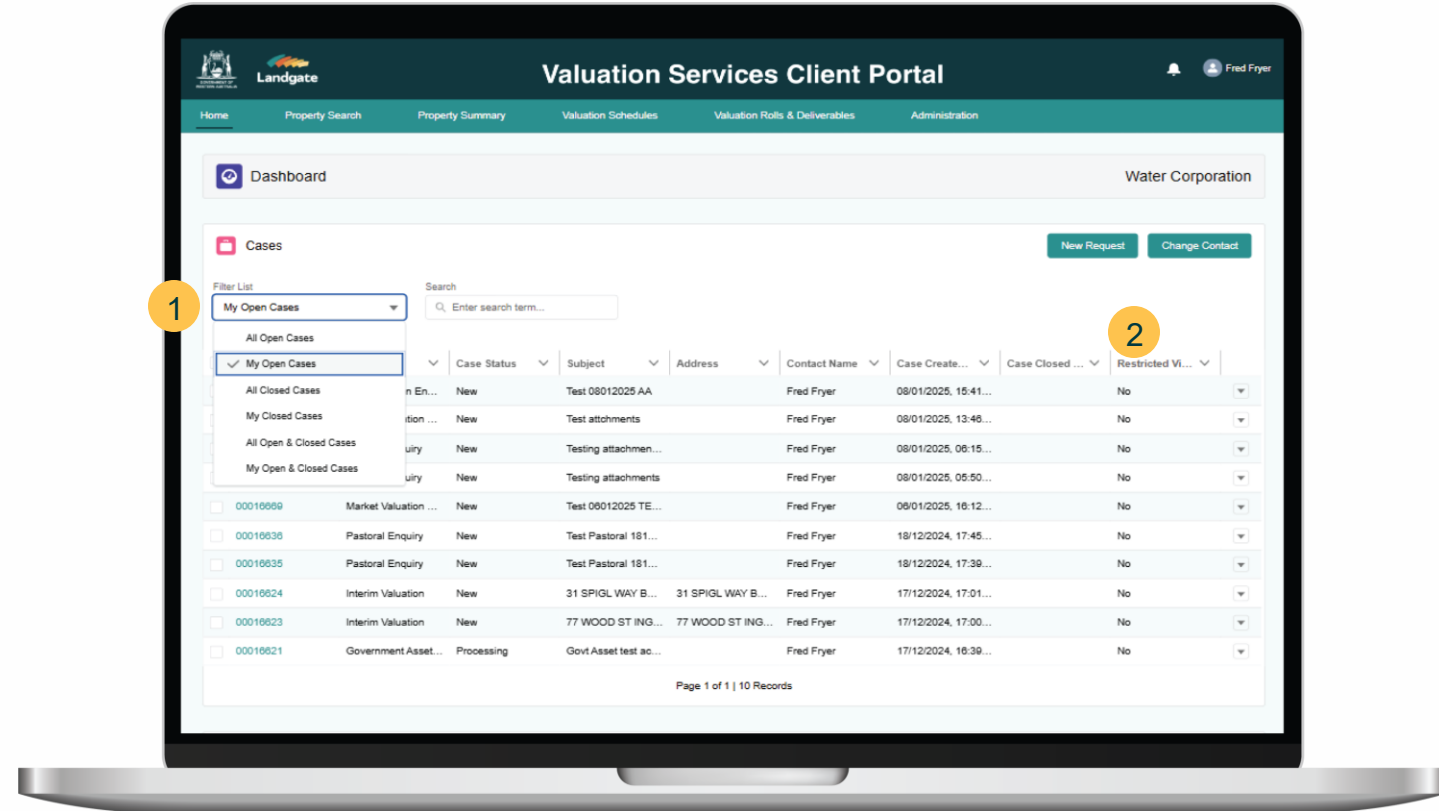
- 1 The top section of the **Home Dashboard** displays the open cases for the client user. This is the default view.





# Cases

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

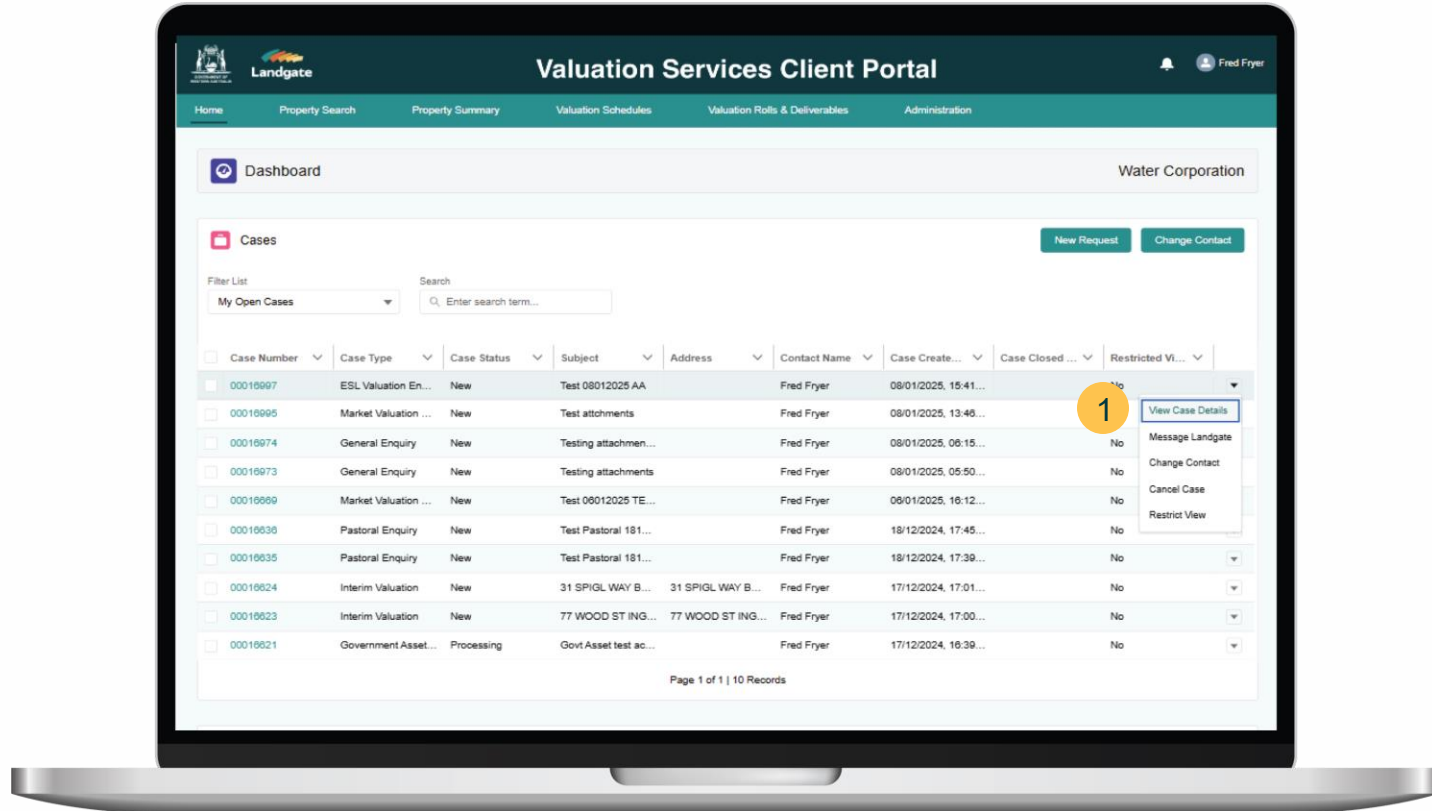




# Cases – actions menu

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

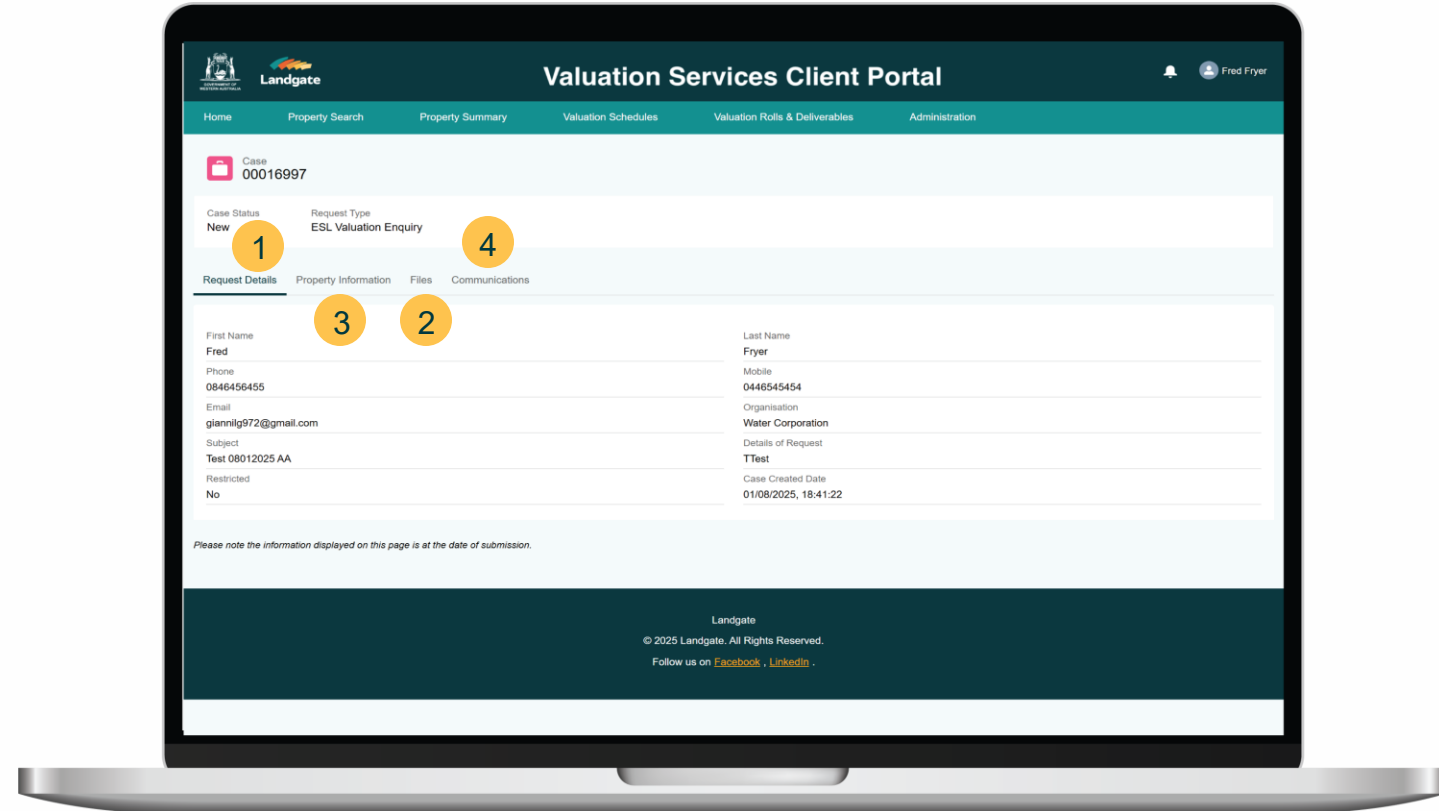




# Cases – view case details

Selecting **View Case Details** or clicking on a case number will launch the case details. Current details are on the dashboard.

- 1 The information shown under **Request Details** is at the point in time when the request was submitted. Attachments provided will be displayed under the **Files** tab.
- 2
- 3 **Property Information** tab will show the details of the associated property.
- 4 **Communications** tab will show messages between the agency and Landgate associated with the case.



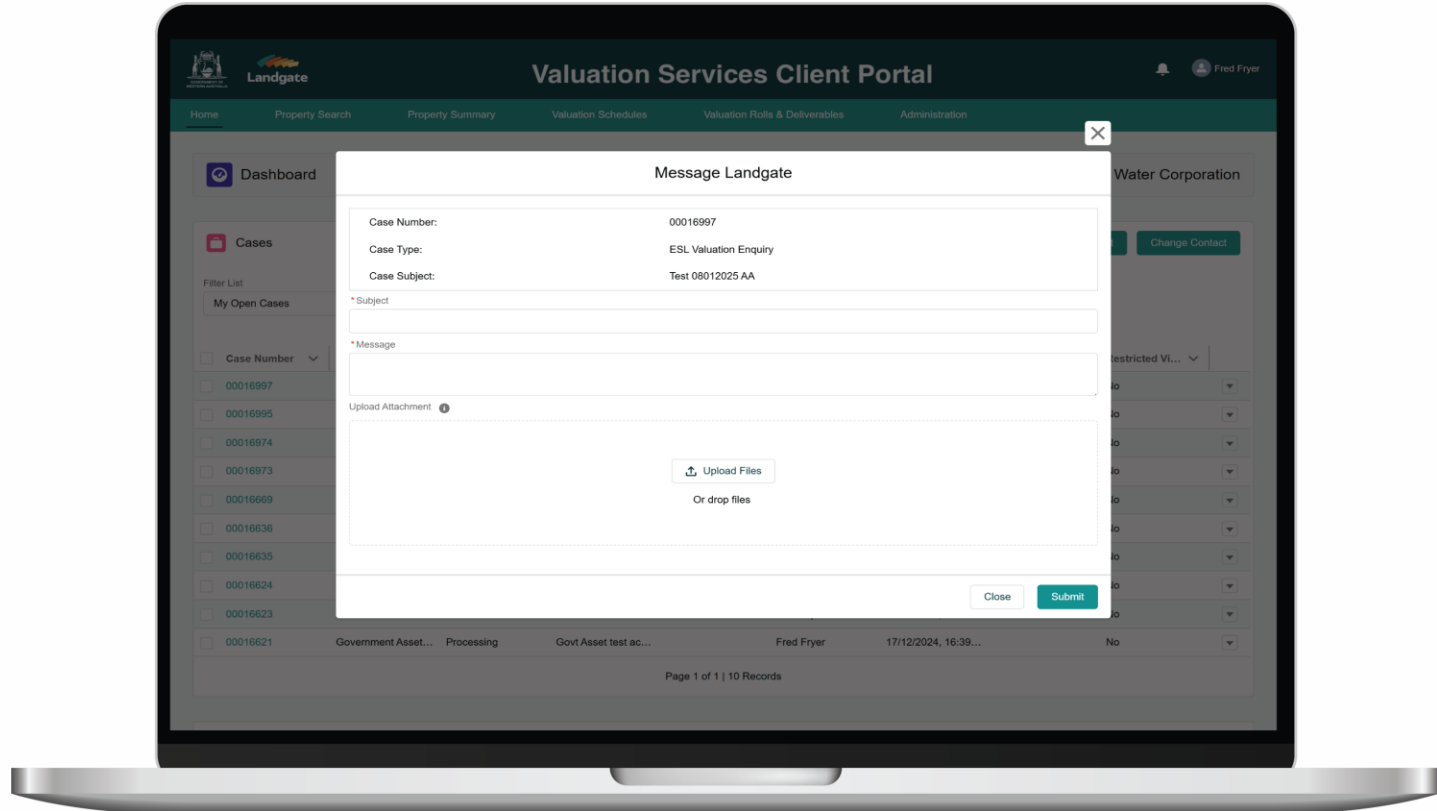




# Cases – message Landgate

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.

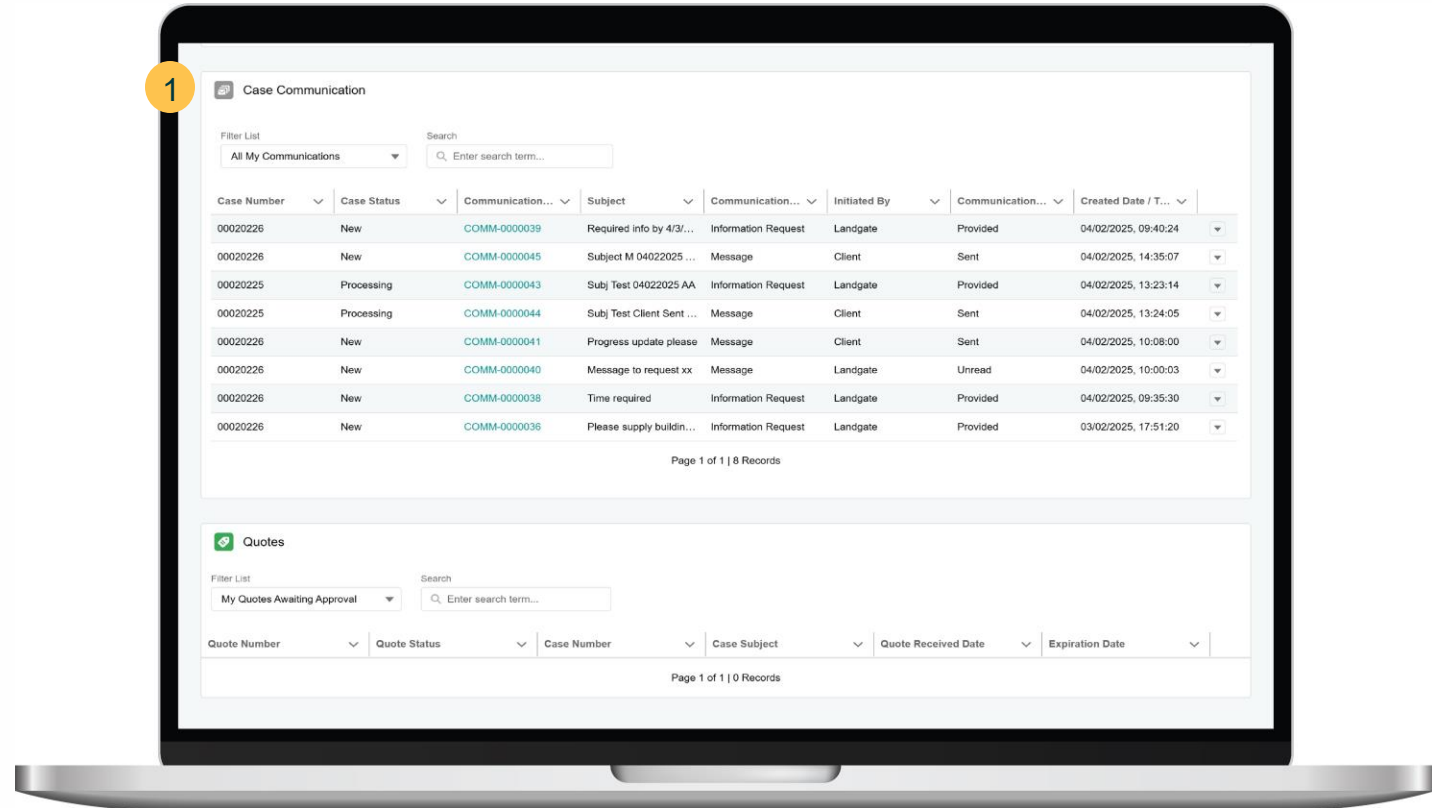
The case owner at Landgate will directly receive the message and reply/action as required.





# Cases – view messages

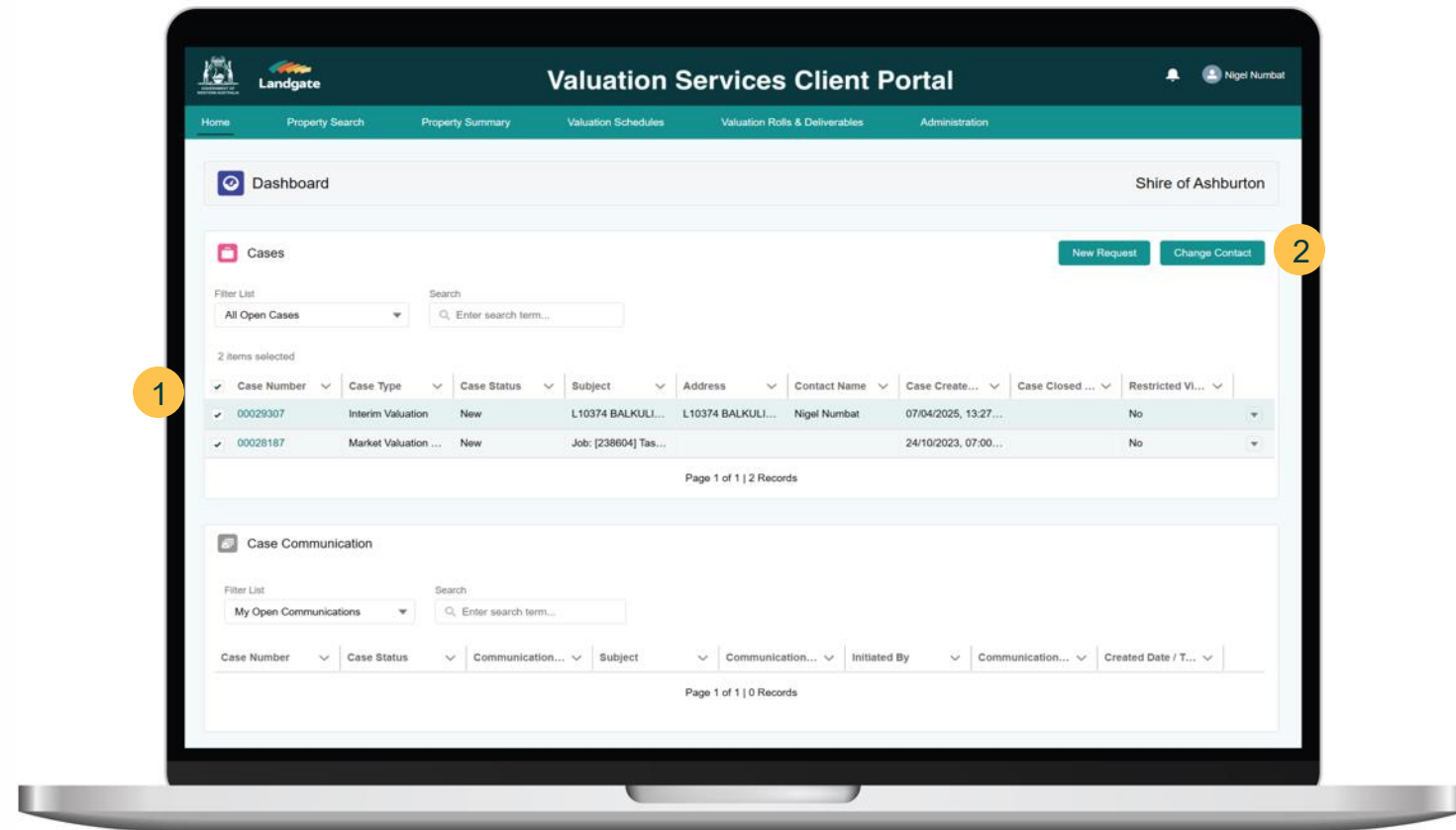
- 1 Sent and received messages will be visible in the **Case Communication** section of the Dashboard.





# Cases – change contact

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



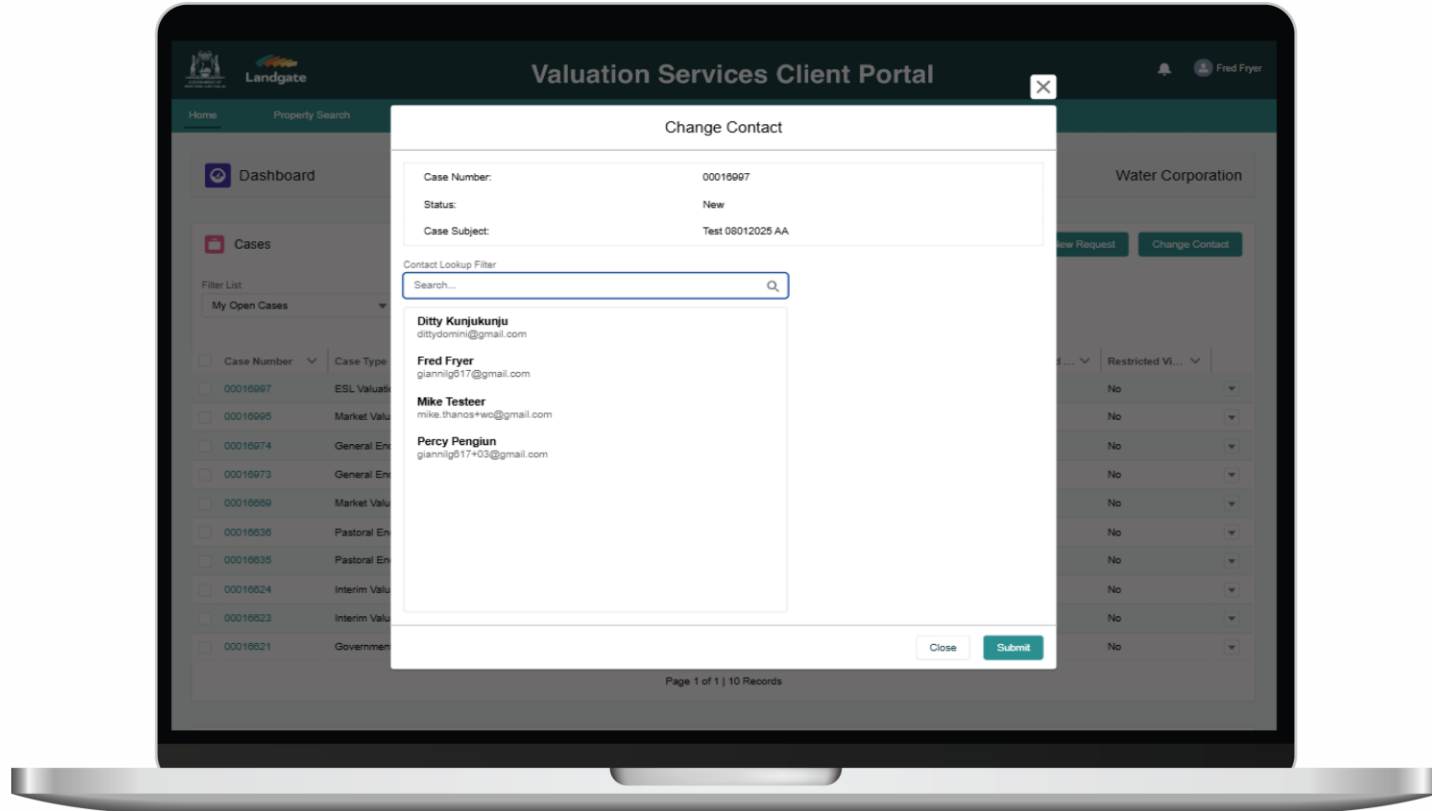


# Cases – change contact (cont.)

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.

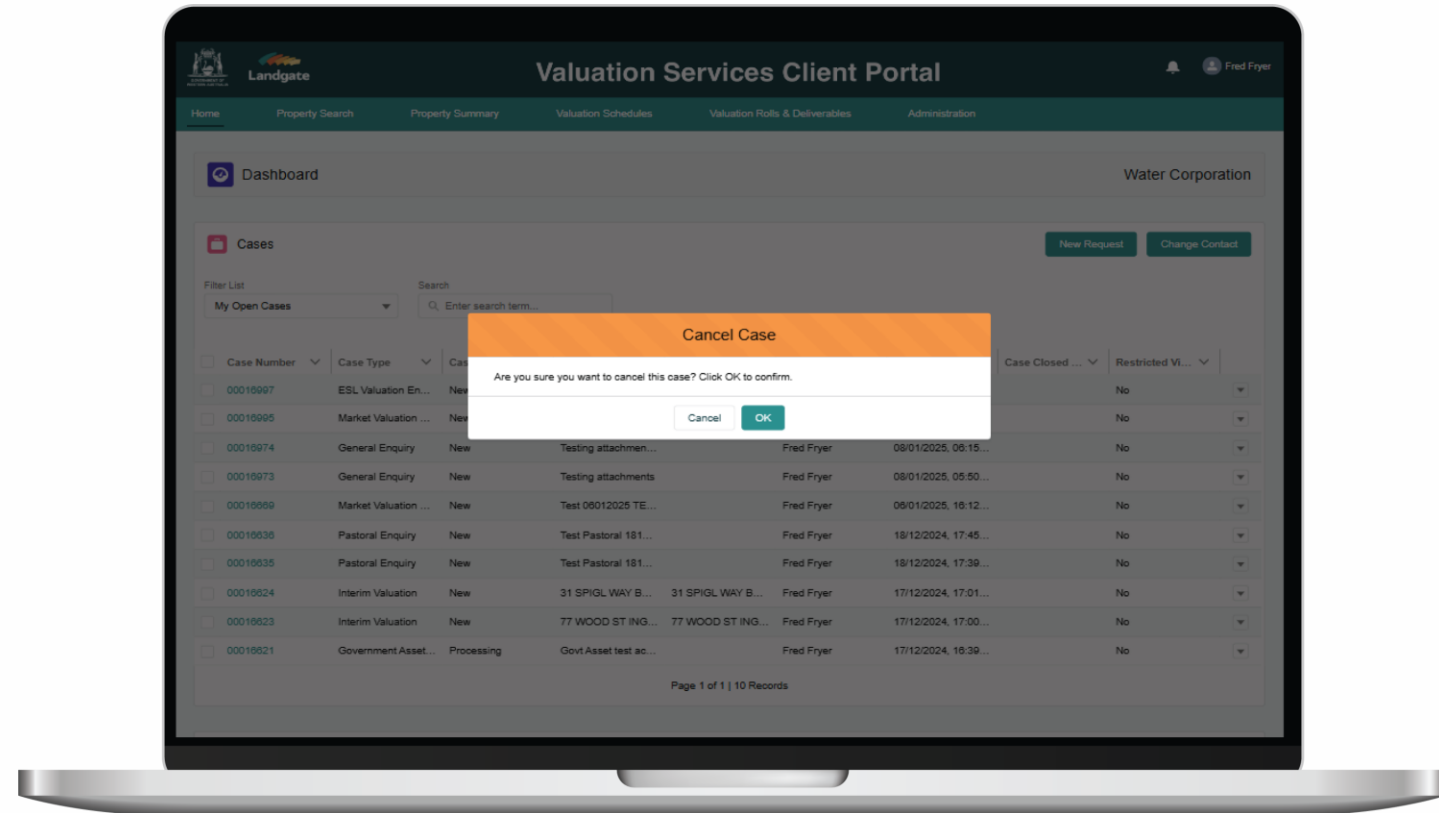




# Cases – cancel a case

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.



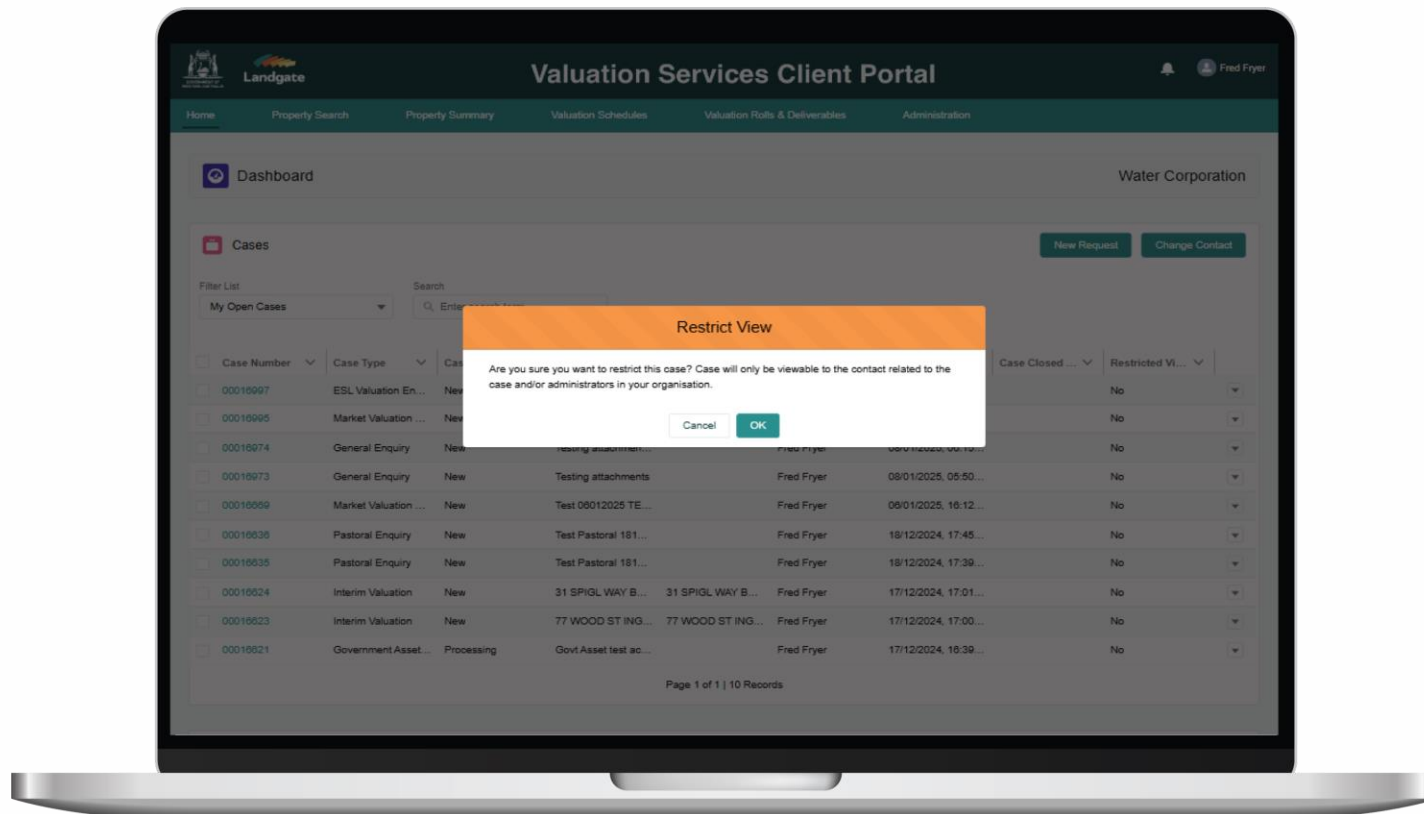


Value

# 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.

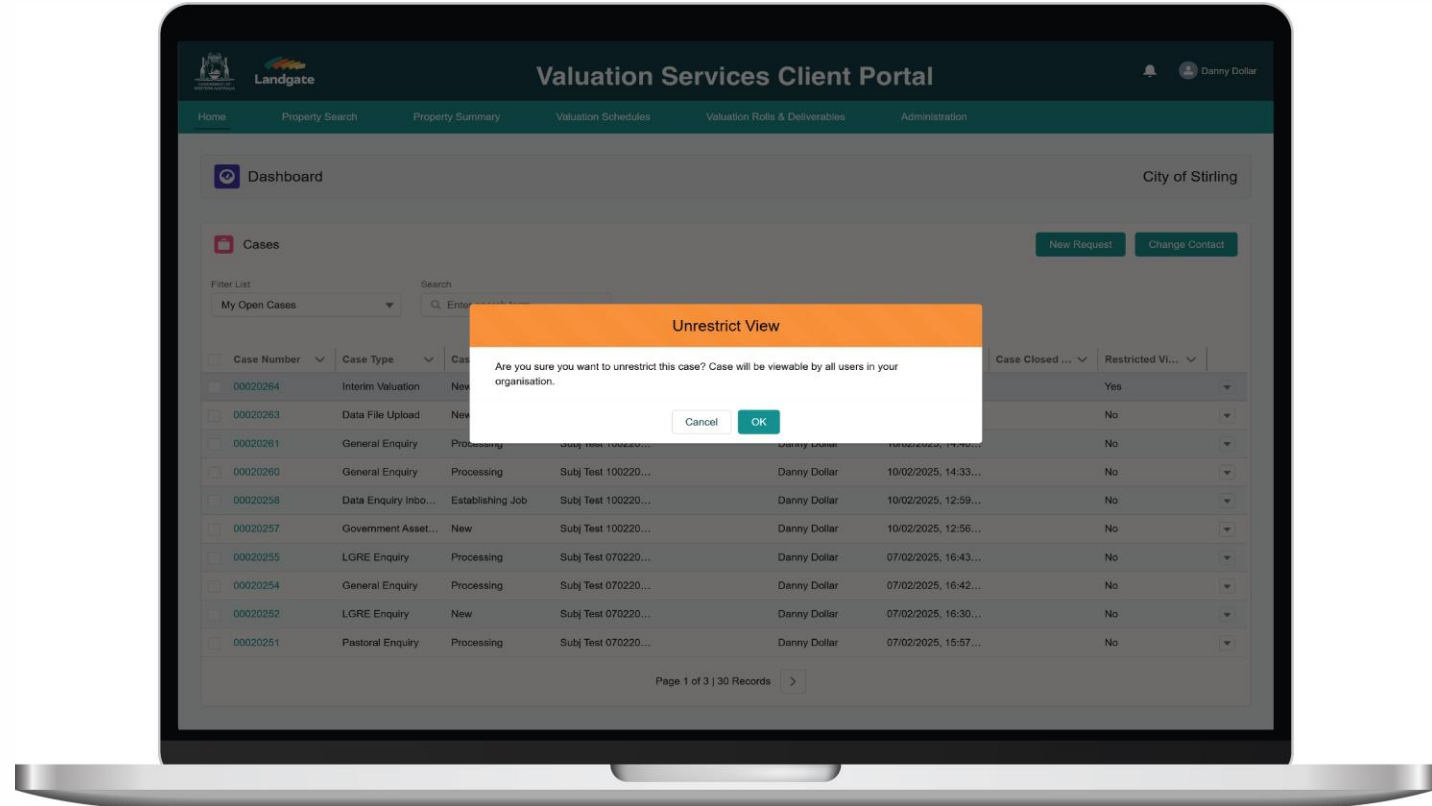




# Cases – unrestrict case view

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

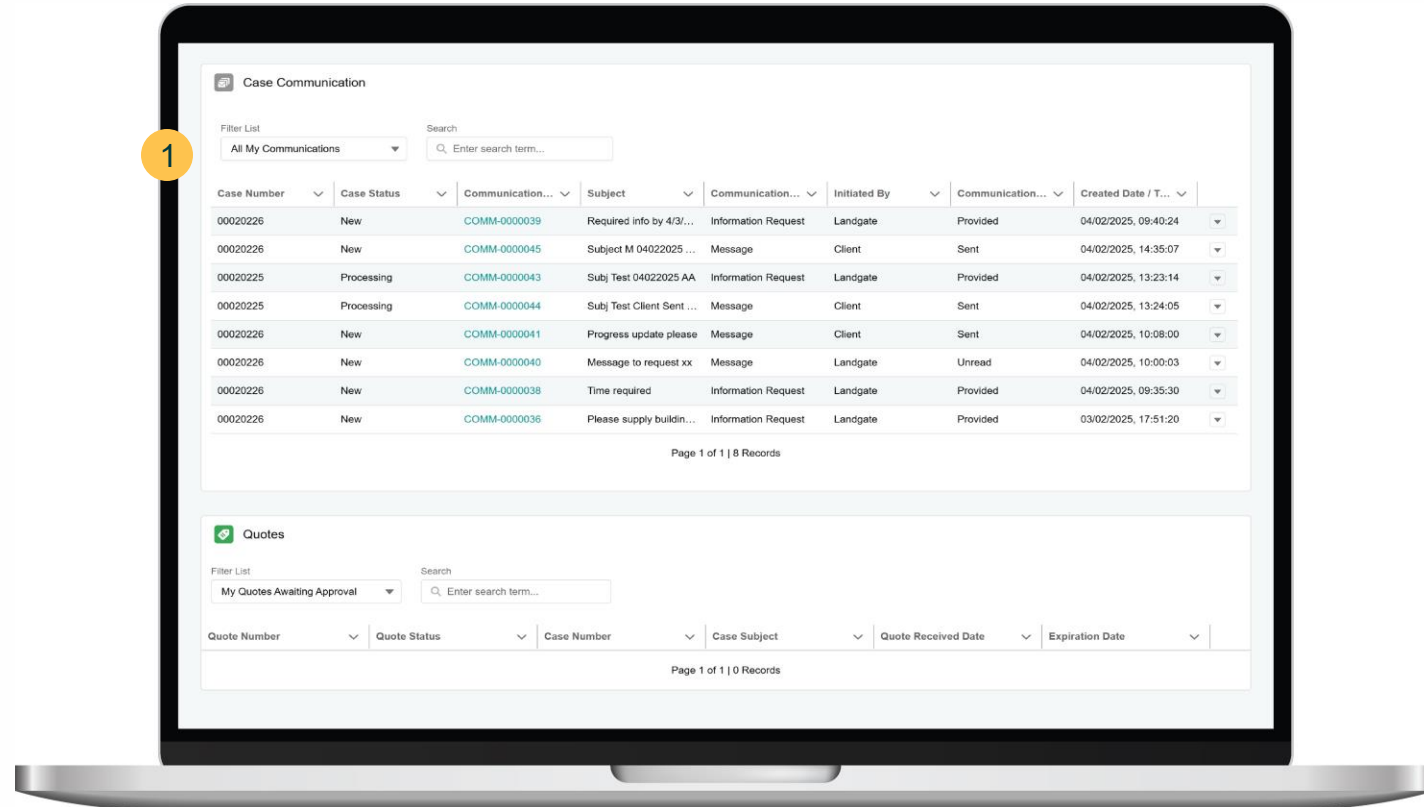
There are two categories for communication:

**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.

- 1 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.



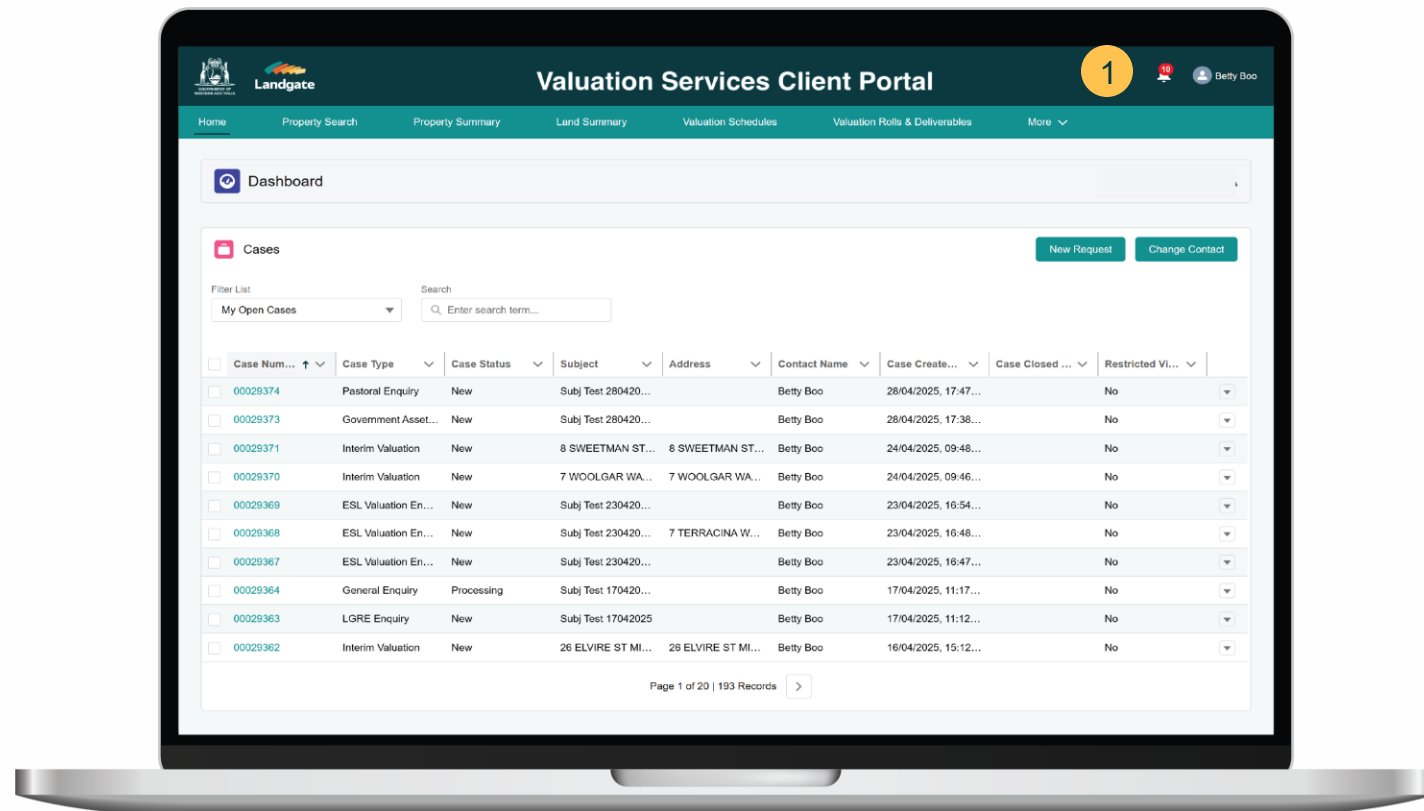




Value

# Case Communication

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





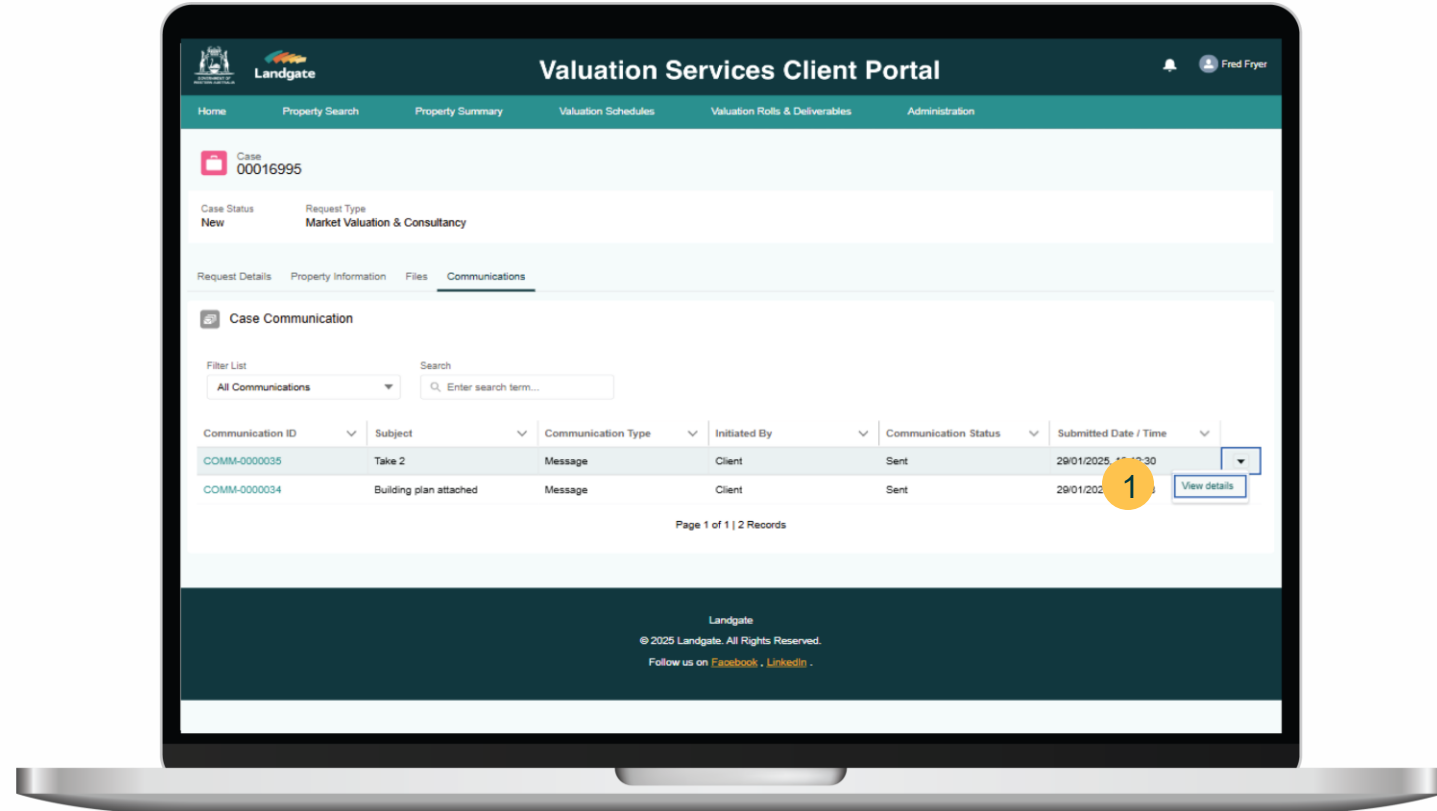
Value

# Case Communication – view details

1 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.

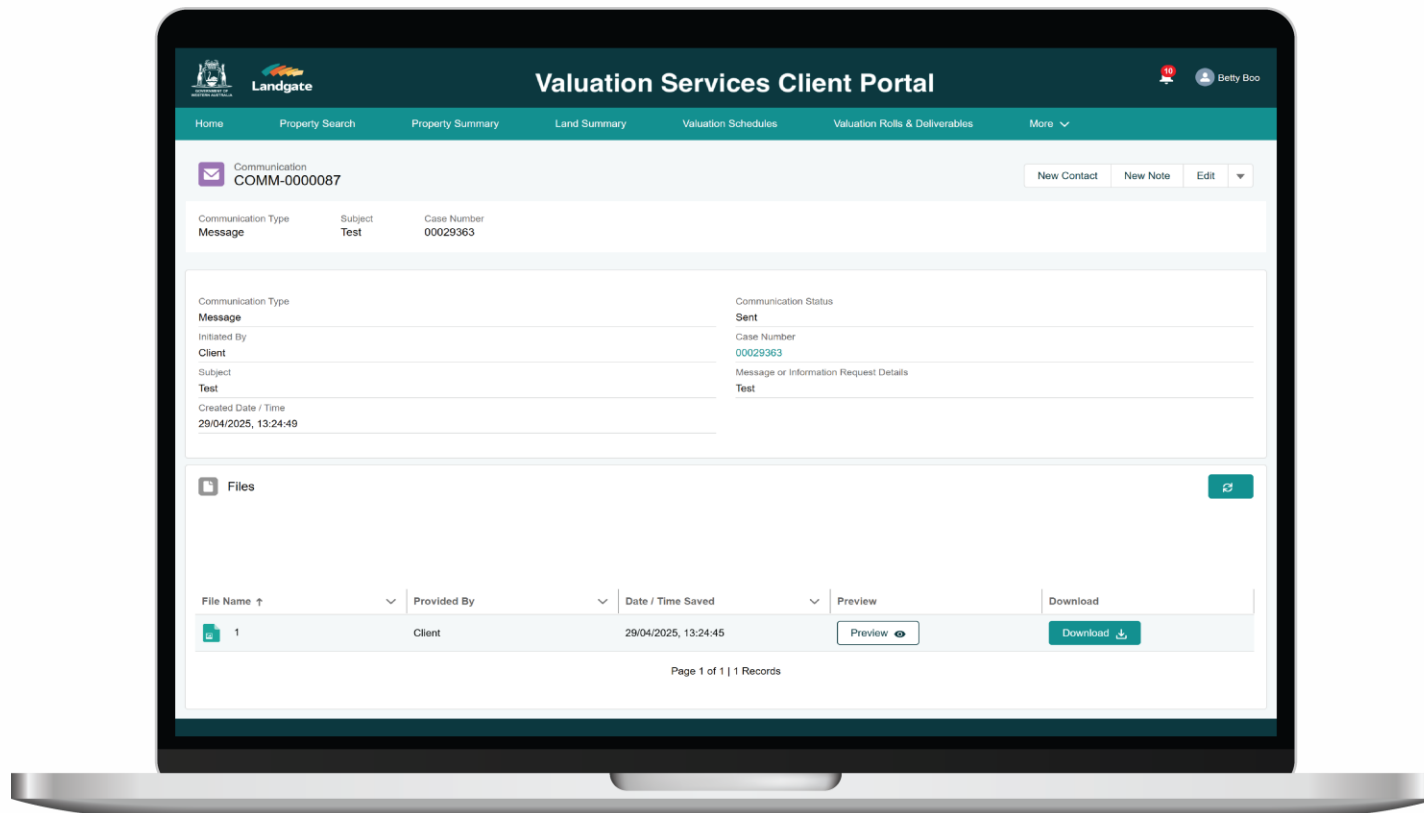




# Case Communication – view details

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.

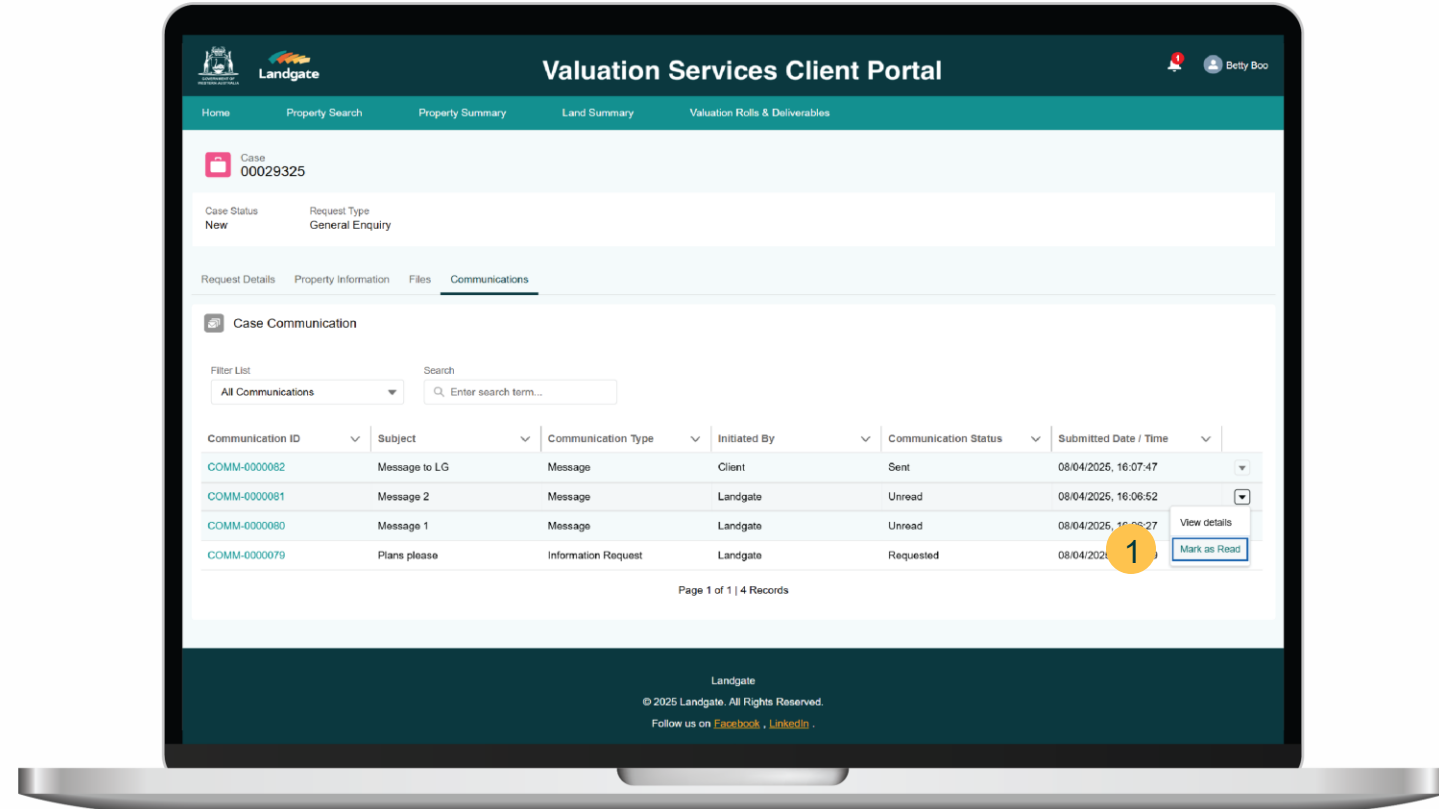




# Case Communication – message received

- 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.

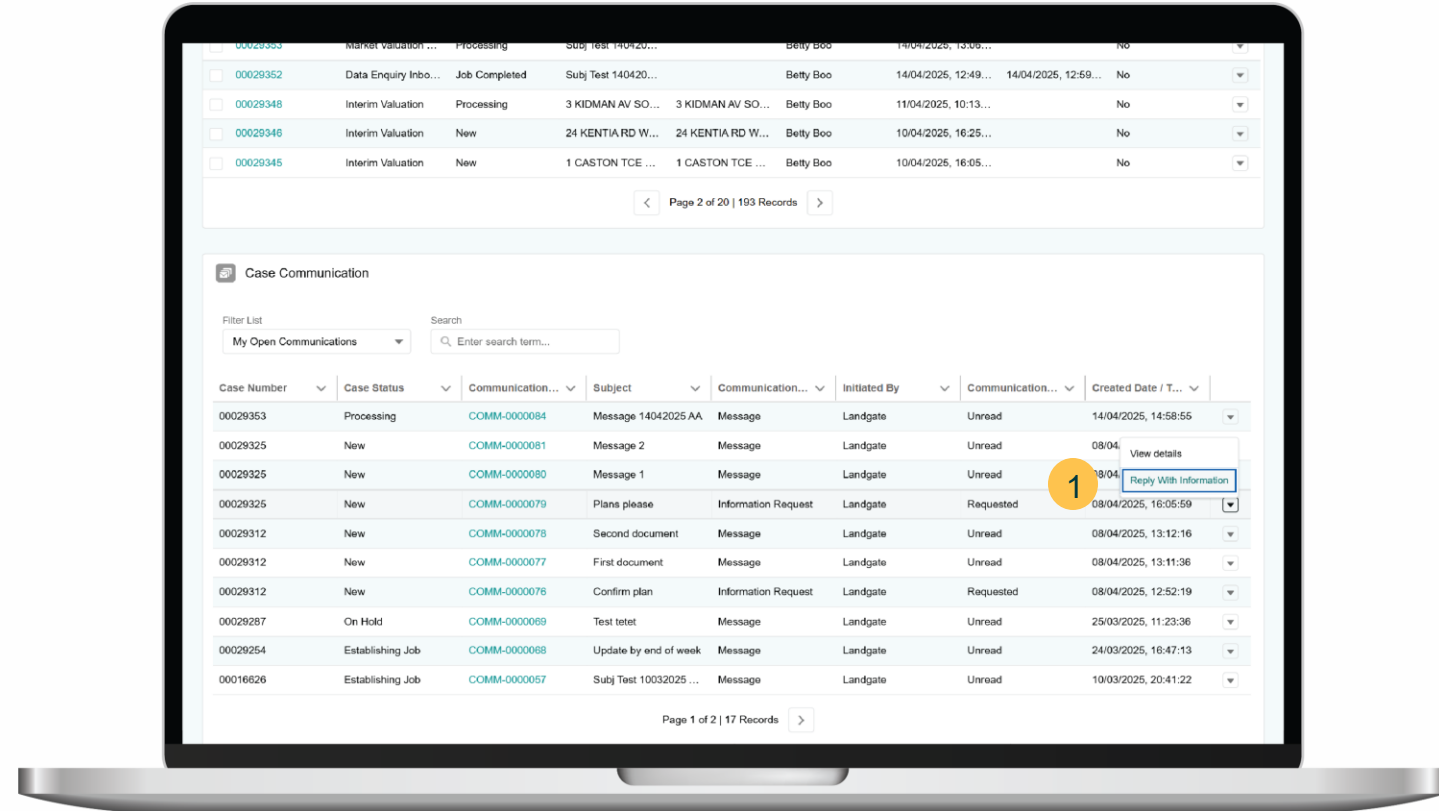




# Case Communication – information request received

- 1 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.

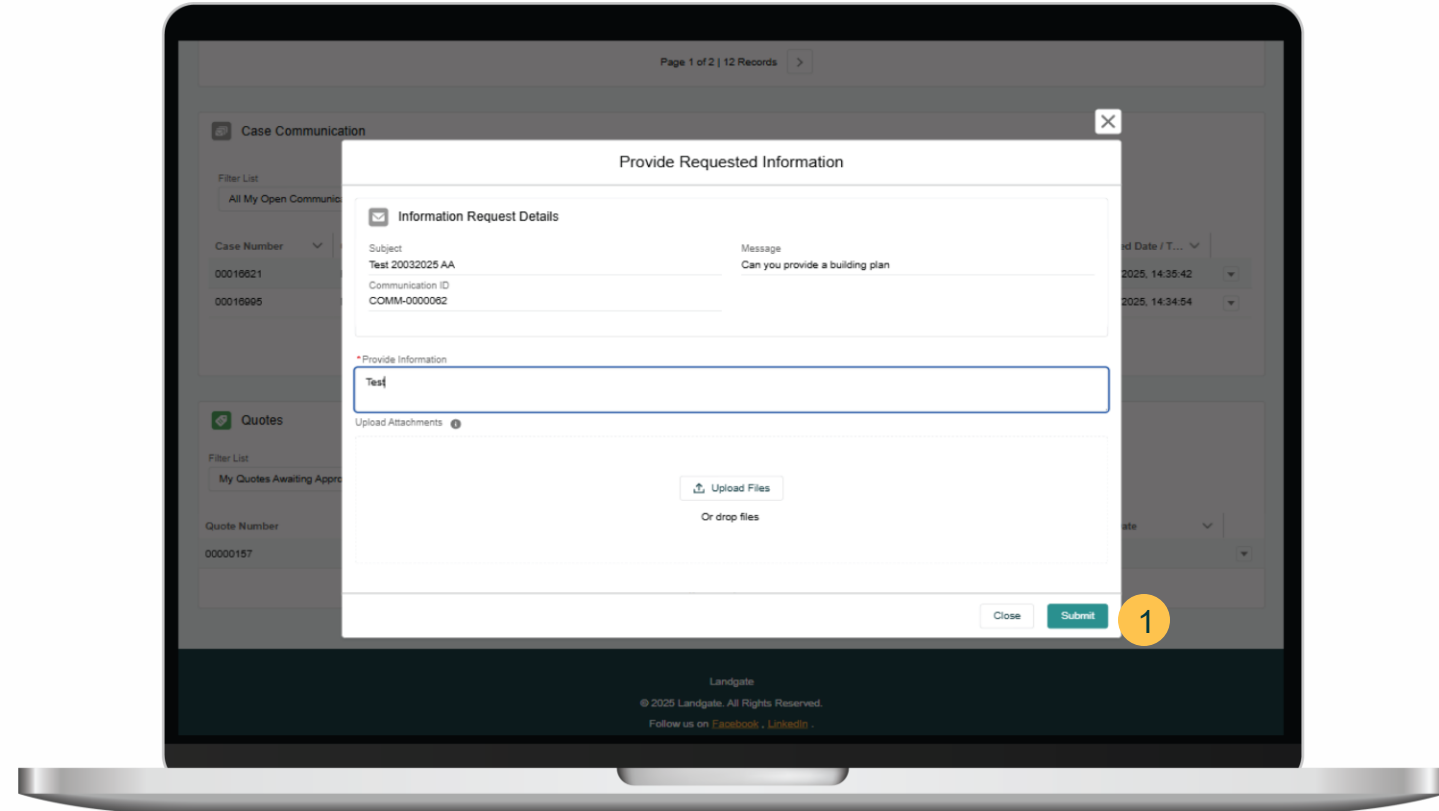




# Case Communication – reply to information request

- 1 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.





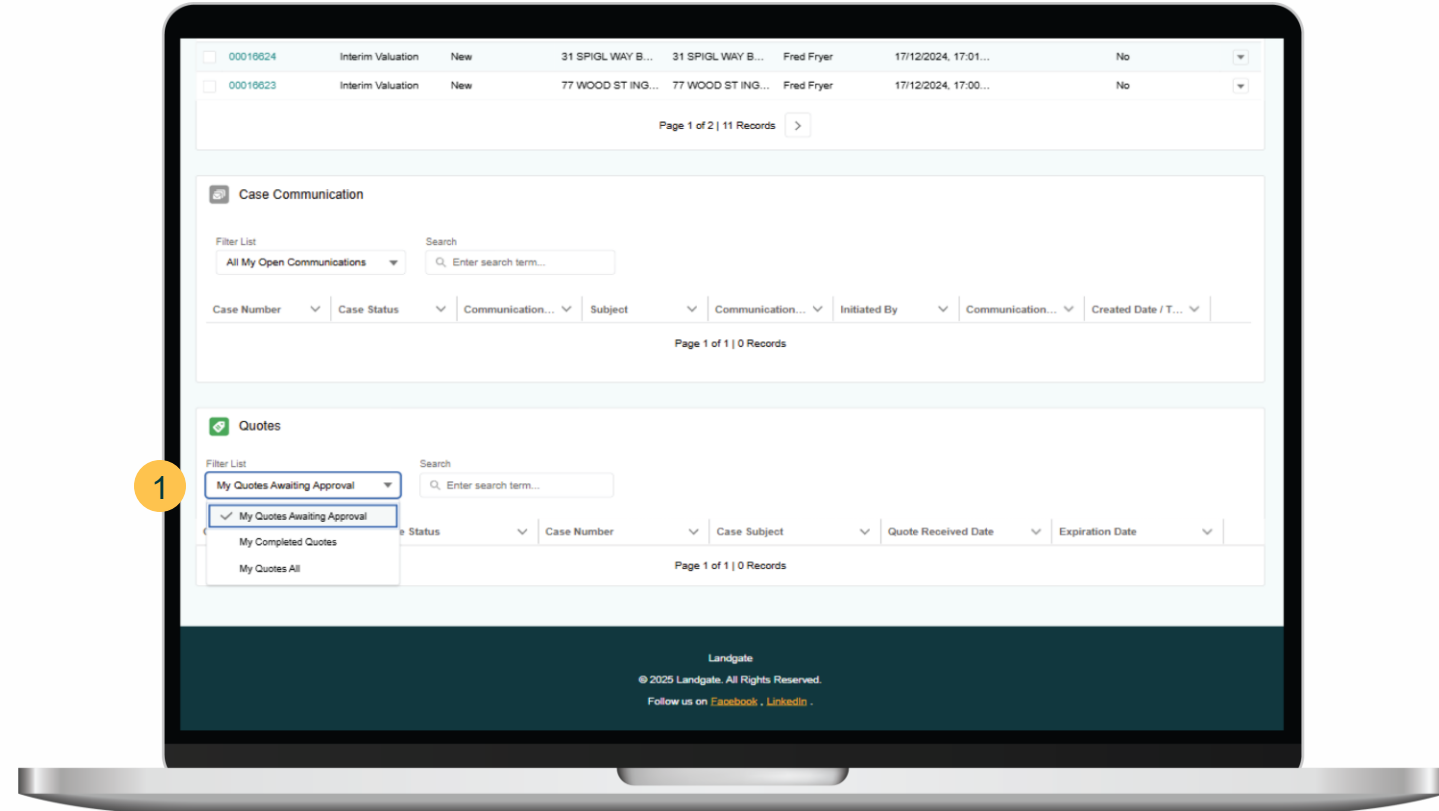
# Quotes

- 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.

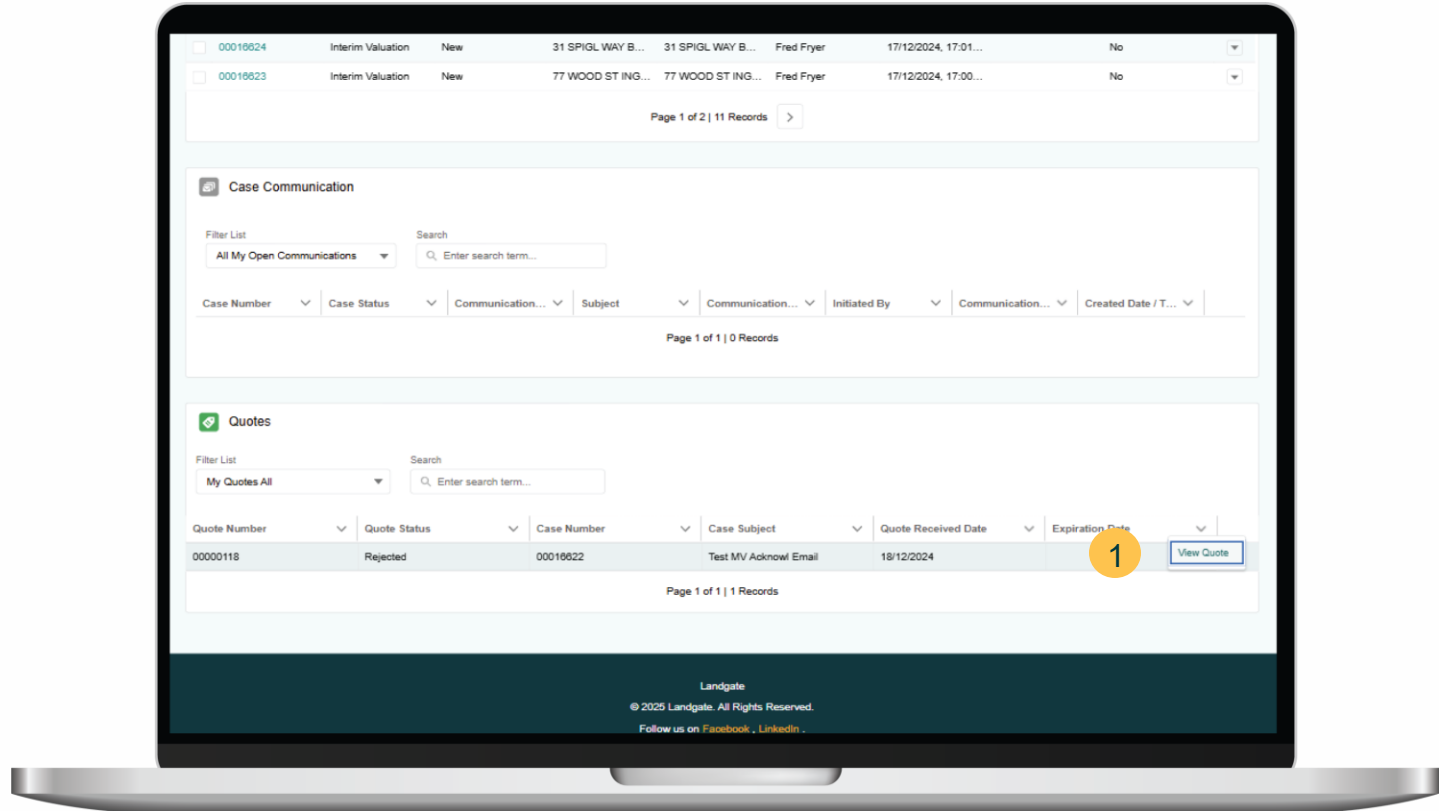




# Quotes – view details

- 1 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.





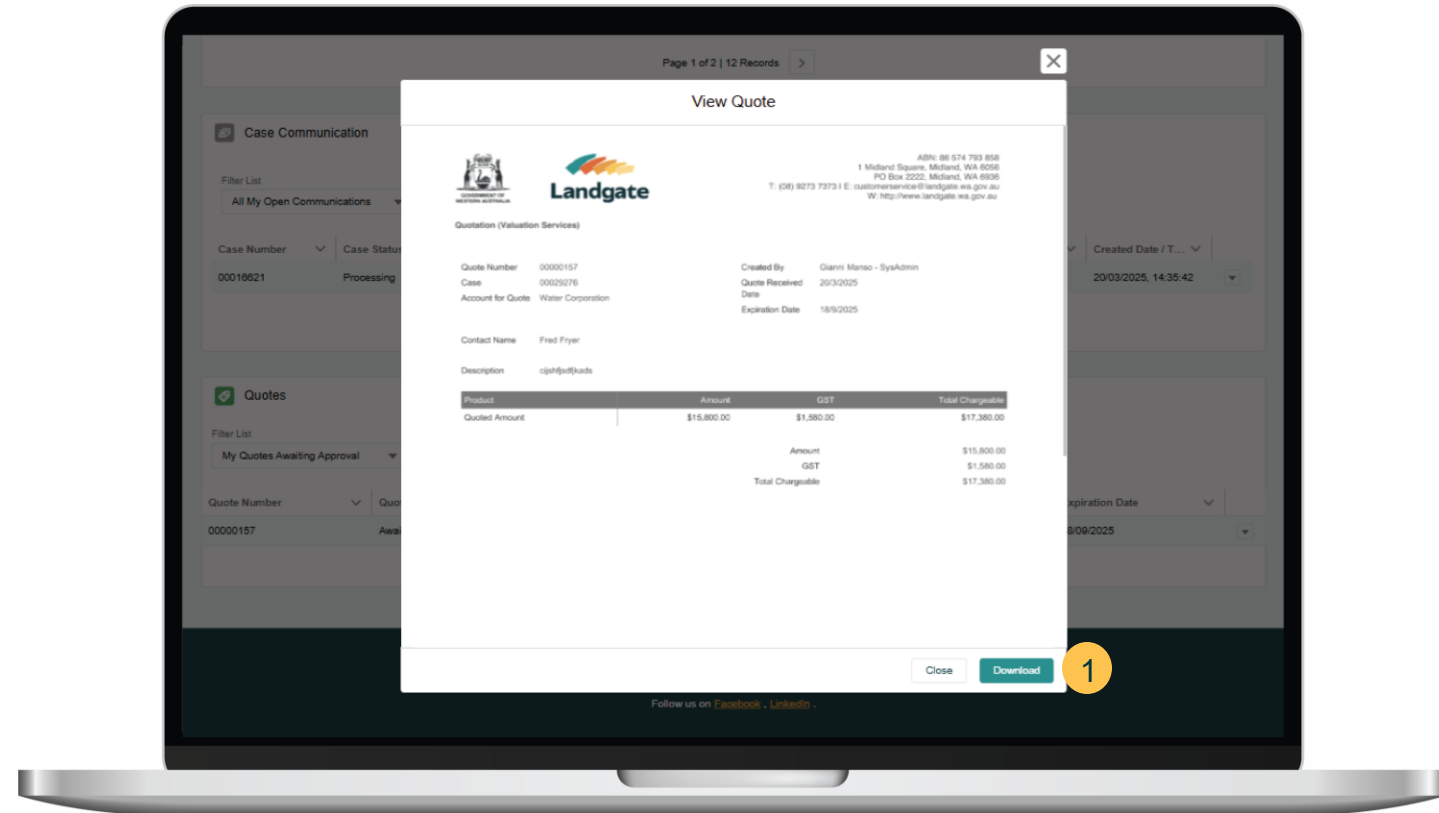


Value

# 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.

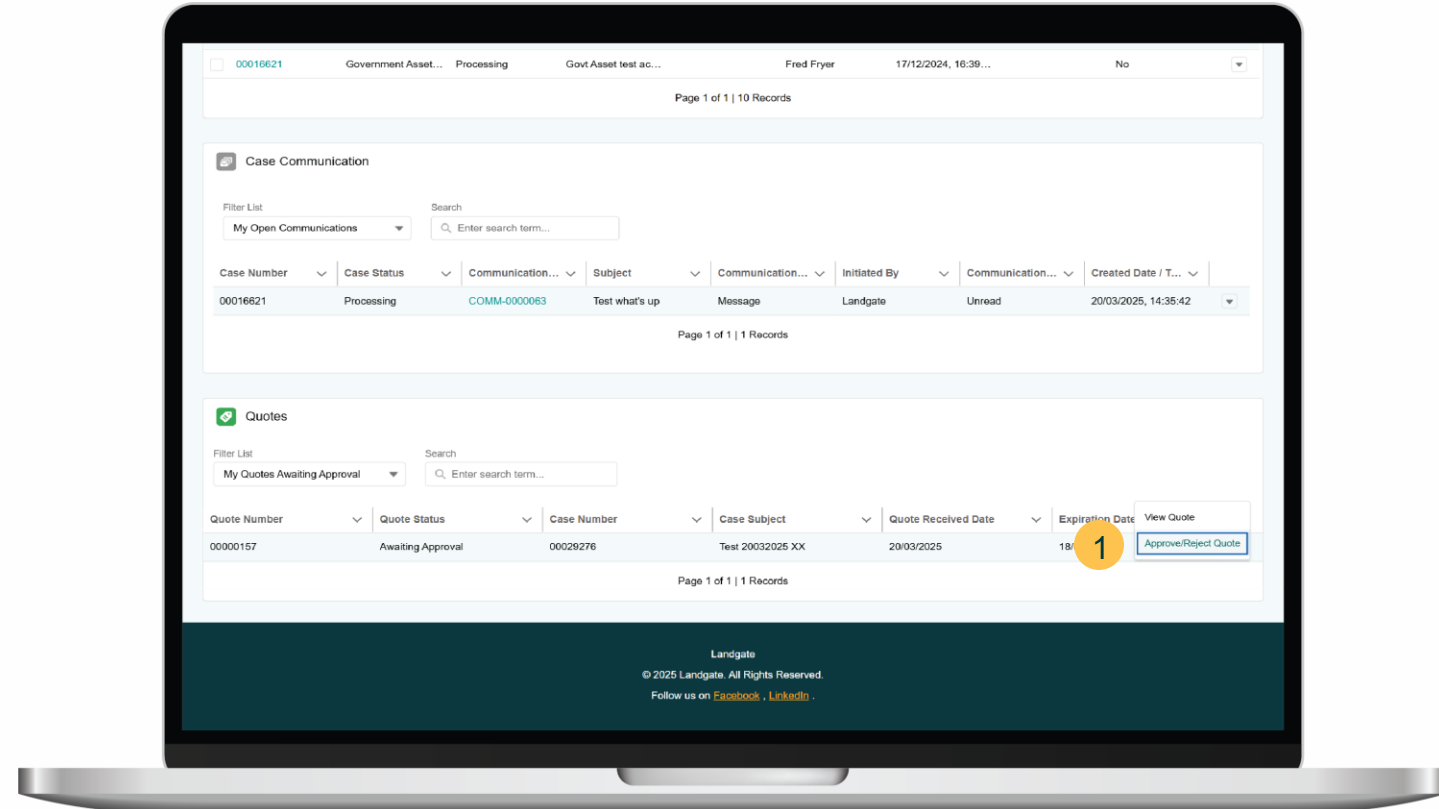




# Quotes – complete action

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

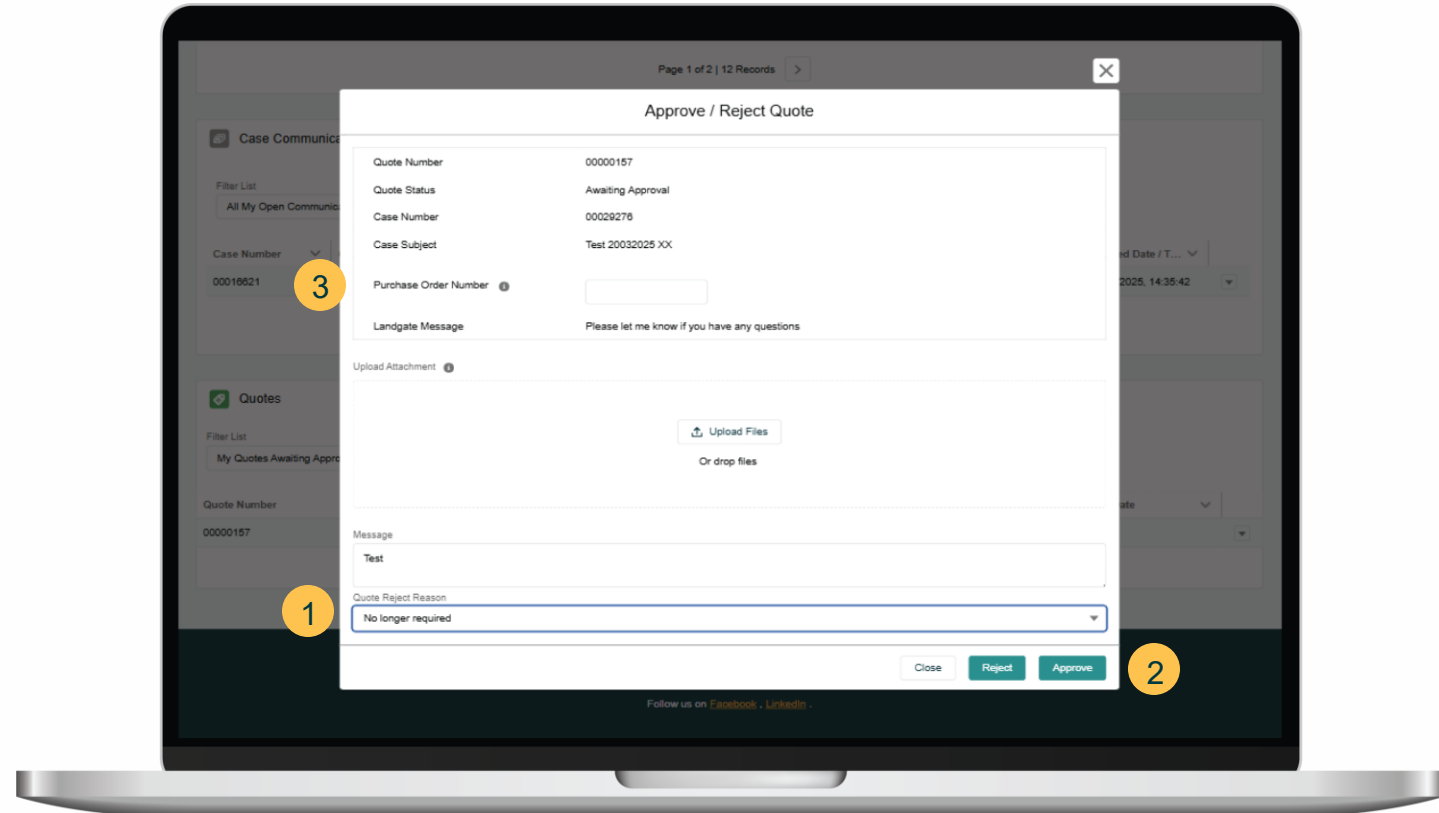
This action is no longer available if the quote has expired. A quote will expire in 182 days (approx. 6 months). Once expired, the quote will be moved to “My Completed Quotes” with a status of Expired.





# 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.





**Value**

## **Client Portal - Property Search**



Value

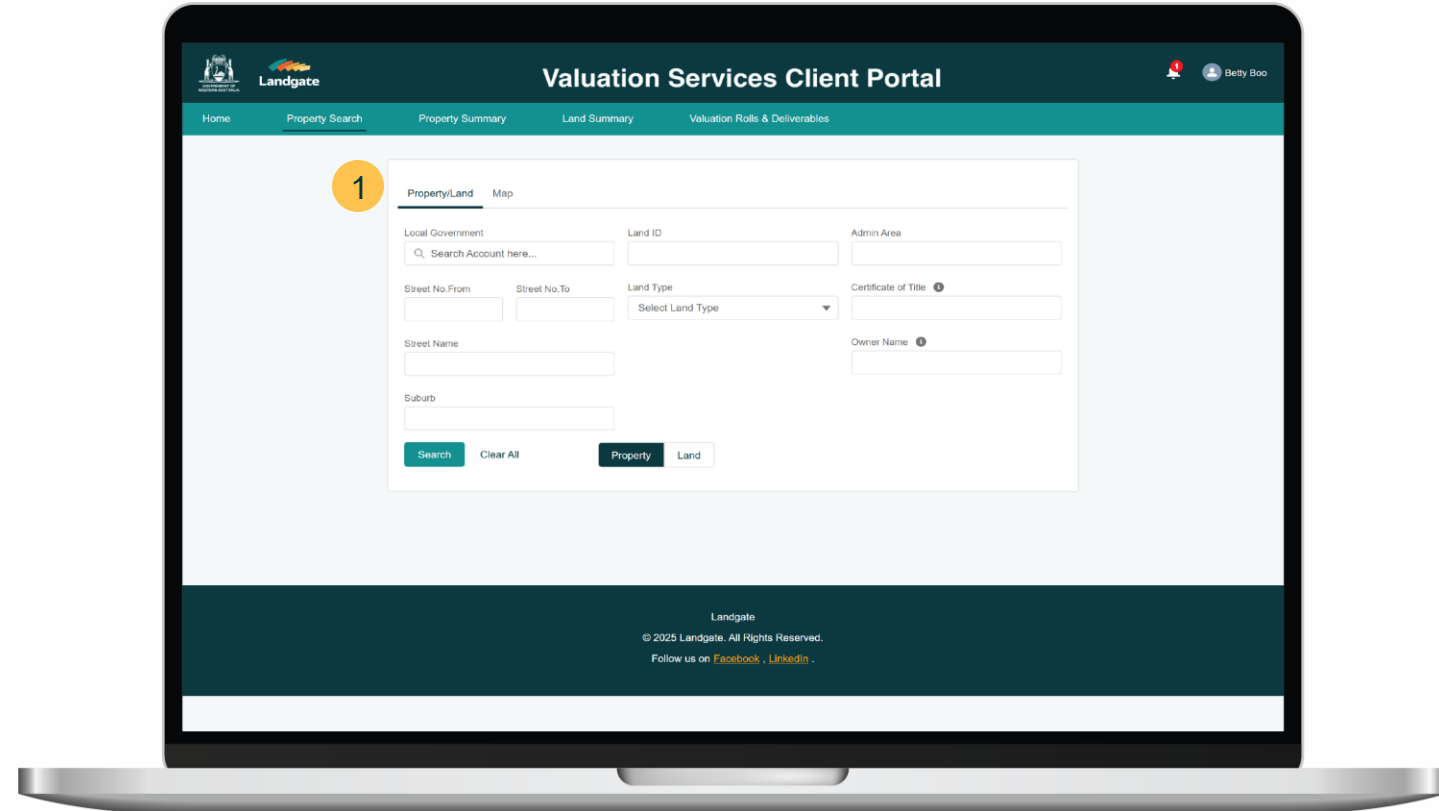
# Property Search - options

1 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.

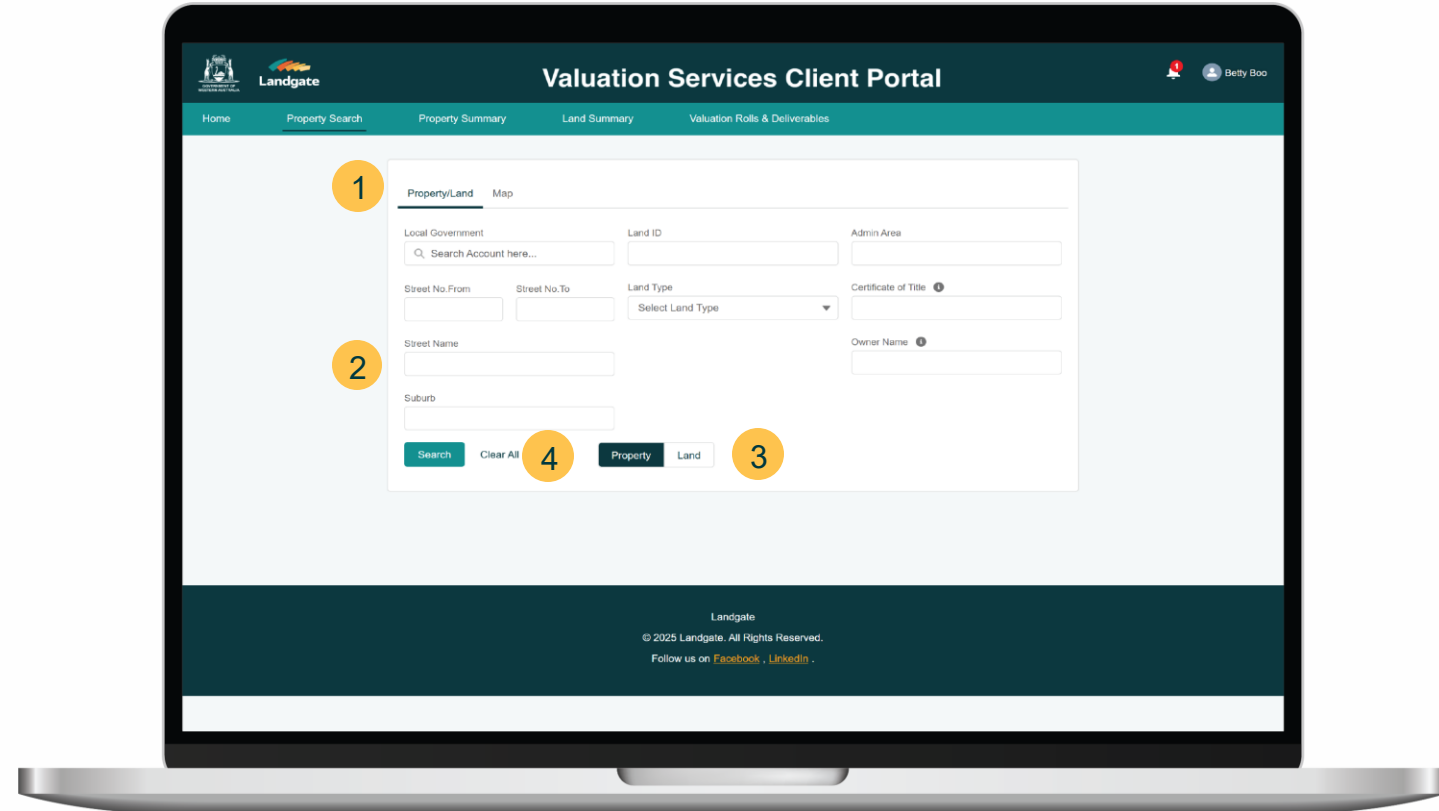
Property Search can also be accessed by users when they have clicked the **Go to Property Search** link when completing a new request form.





# Property/Land search

- 1 Clicking on **Property Search** will default to the Property/Land search form. Users can search for properties using various data specifications.
- 2 When conducting a search on a Street Name, the address is to be entered with the abbreviated street type e.g. Rd or no street type.
- 3 Search results can be returned based on a property or land using the toggle function.
- 4 To begin a new query, always click "Clear All".



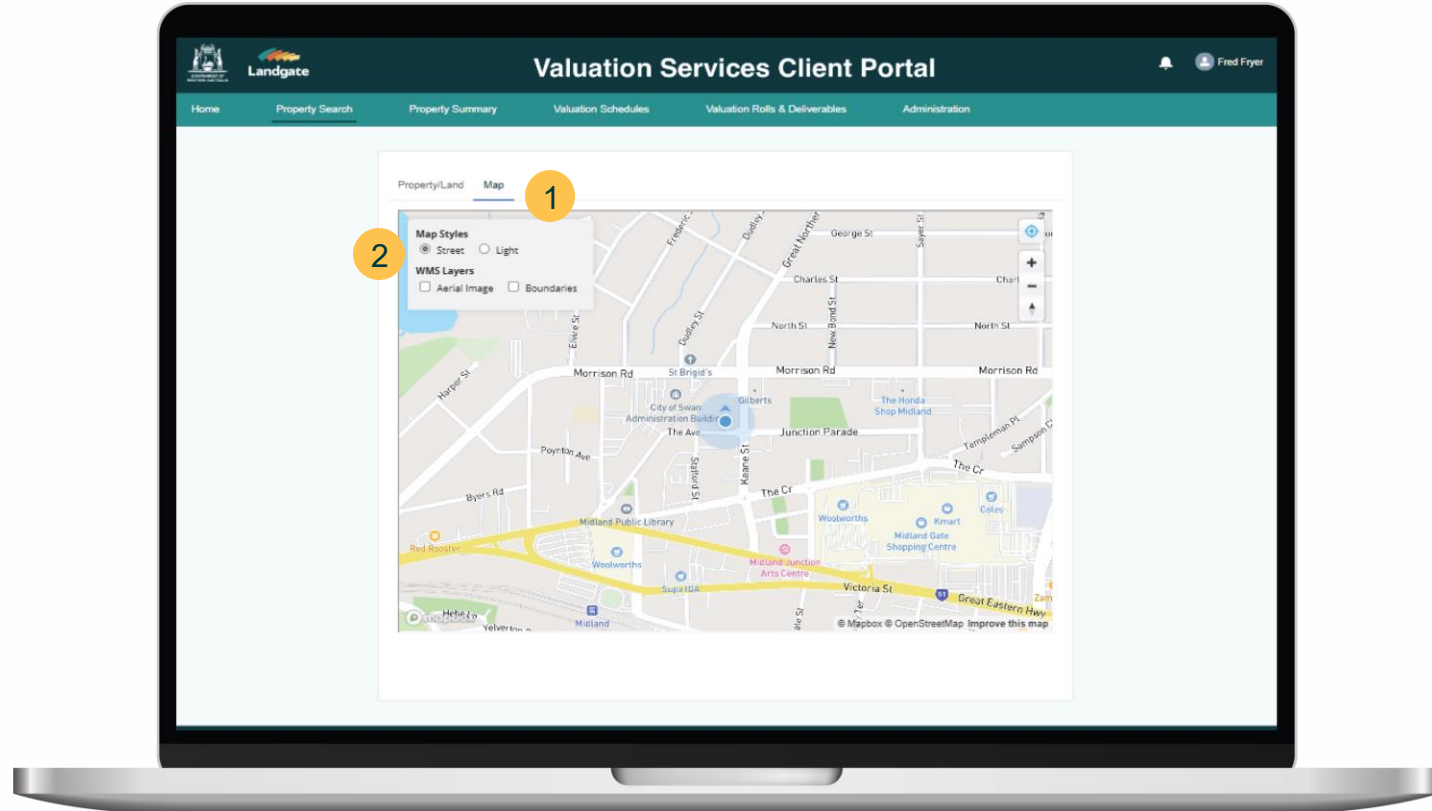


# Map search

- 1 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 / Land search results

- 1 Details displayed in search results will differ if Property or Land is toggled on for the search.
  - Property search results will be ordered by VEN
  - Land search results will be ordered by Land ID
- 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 a new request form selected

VEN	Lot No.	Address	VEN Area	Primary	U/R
75	L2	35 SEARIPPLE RD KARRATHA 6714	1.6266 Ha	2D69927	Urban
185	L4228	TEESDALE PL KARRATHA 6714	1,126 m²	T368/4228	
198	L1067	L1067 KING WAY KARRATHA 6714	4,694 m²	T368/1067	
199	L1068	1068 KING WAY KARRATHA INDUSTRIAL ES...	5,774 m²	1068P211744	Urban
200	L1072	L1072 CHERRATA RD KARRATHA INDUST...	4,785 m²	1072P211744	Urban
205	L3911	3911 COOLAWANYAH RD KARRATHA INDU...	8,025 m²	3911P187236	Urban
227	L3799	4 RANKIN RD GAP RIDGE 6714	6,0000 Ha	3799P1851...	Urban
245	L1982	5 SHERLOCK CR KARRATHA 6714	763 m²	1982P2134...	Urban
288	L902	L902 WALCOTT WAY KARRATHA 6714	1,2116 Ha	T368/902	Urban
294	L1069	1069 KING WAY KARRATHA INDUSTRIAL ES...	4,760 m²	1069P211744	Urban
298	L2608	5 SHARPE AV KARRATHA 6714	1,5204 Ha	2608P2147...	Urban
302	L806	27 SHOLL ST ROEBOURNE 6718	2,023 m²	806P223088	Urban
303	L805	25 SHOLL ST ROEBOURNE 6718	2,023 m²	805P223088	Urban
306	L174	29 ROE ST ROEBOURNE 6718	2,023 m²	174P223090	Urban
465	L1490	1490 Lambert Rd KARRATHA INDUSTRIAL E...	4,679 m²	1490P2139...	Urban
808	L386	5 NIELSEN PL DAMPIER 6713	2,0018 Ha	386P17814	Urban
1217	L1201	L1201 DODD CT KARRATHA 6714	1,620 m²	T368/1201	Urban
1219	L1362	L1362 LADY DOUGLAS WAY PEGS CREEK ...	2,050 m²	T368/1362	Urban
1220	L4624	38-40 LADY DOUGLAS WAY PEGS CREEK 6...	1,025 m²	4624P1839...	Urban
1228	L3890	3890 COOLAWANYAH RD KARRATHA INDU...	1,0925 Ha	3890P1882...	Urban





**Value**

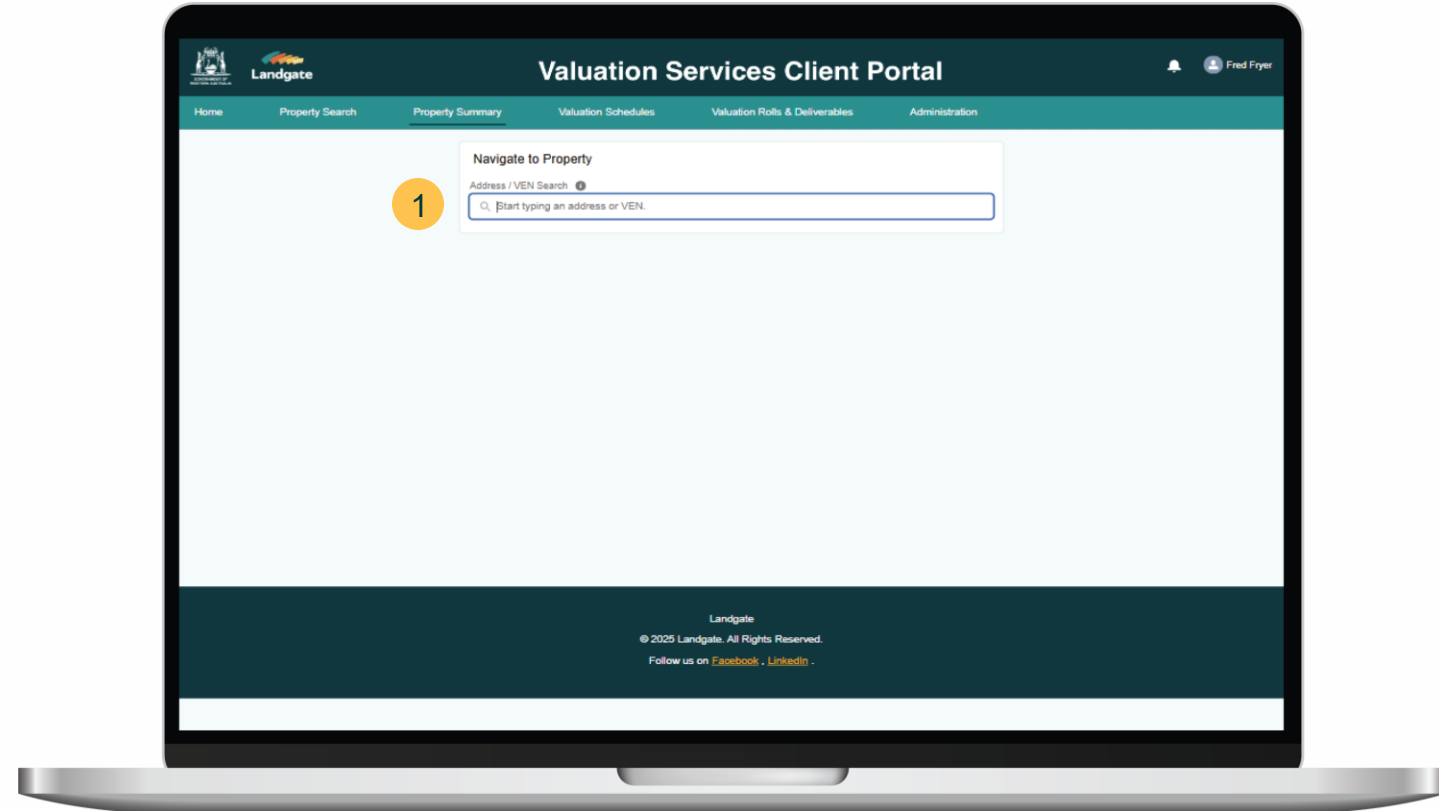
## **Client Portal Property & Land Summary**



# Property Summary - address/VEN search

- 1 At the top of the **Property Summary** is the quick navigation feature.

Users will be able to enter a VEN or address to suggest matched results. Only active VENs will be returned. On selecting the relevant property, the property details will be displayed on the same page.





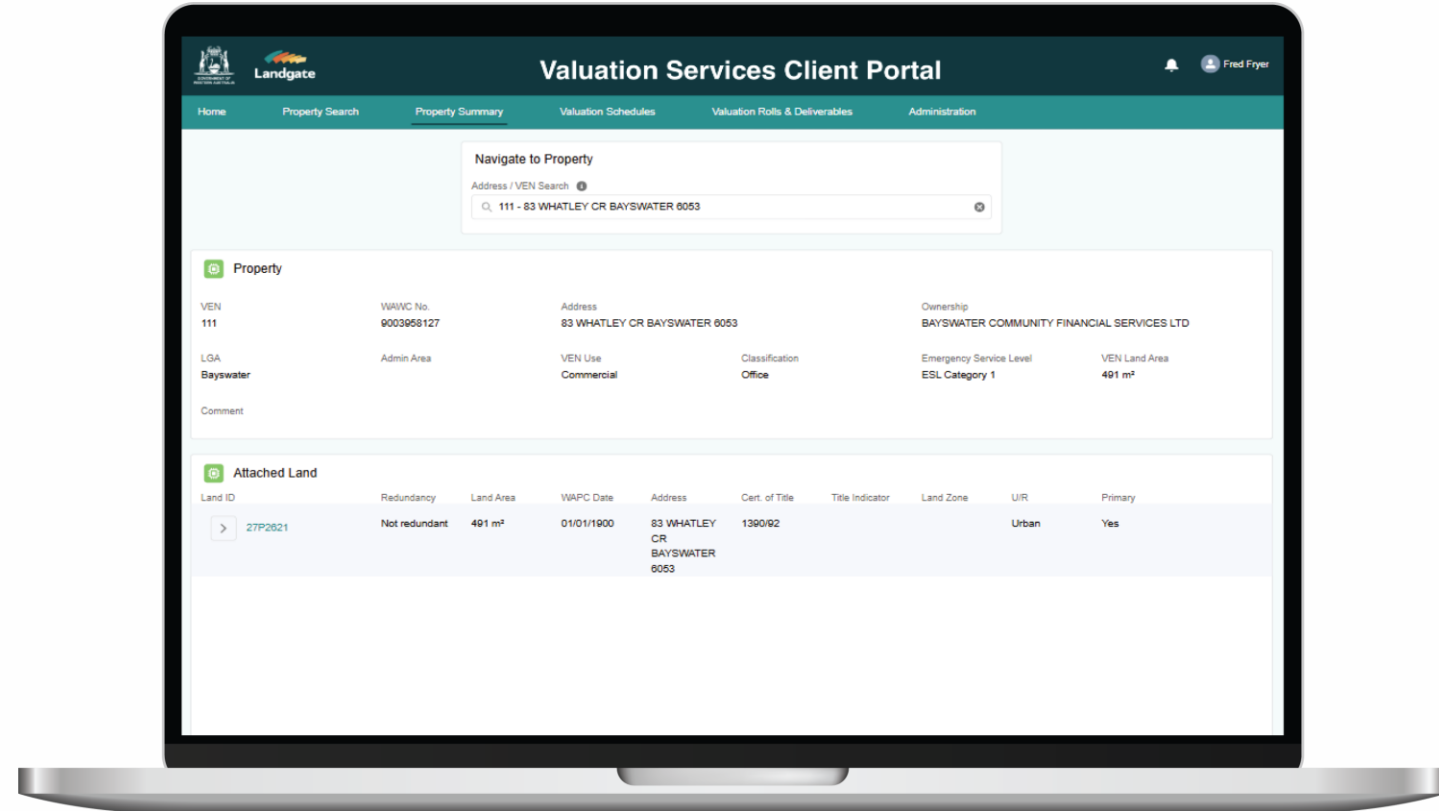
# Property Summary - page structure

The following information sections will be displayed to users once a property has been selected from the search results:

- Property details
- Attached Land details
- Valuation Summary details

Access to certain data may have the following dependencies:

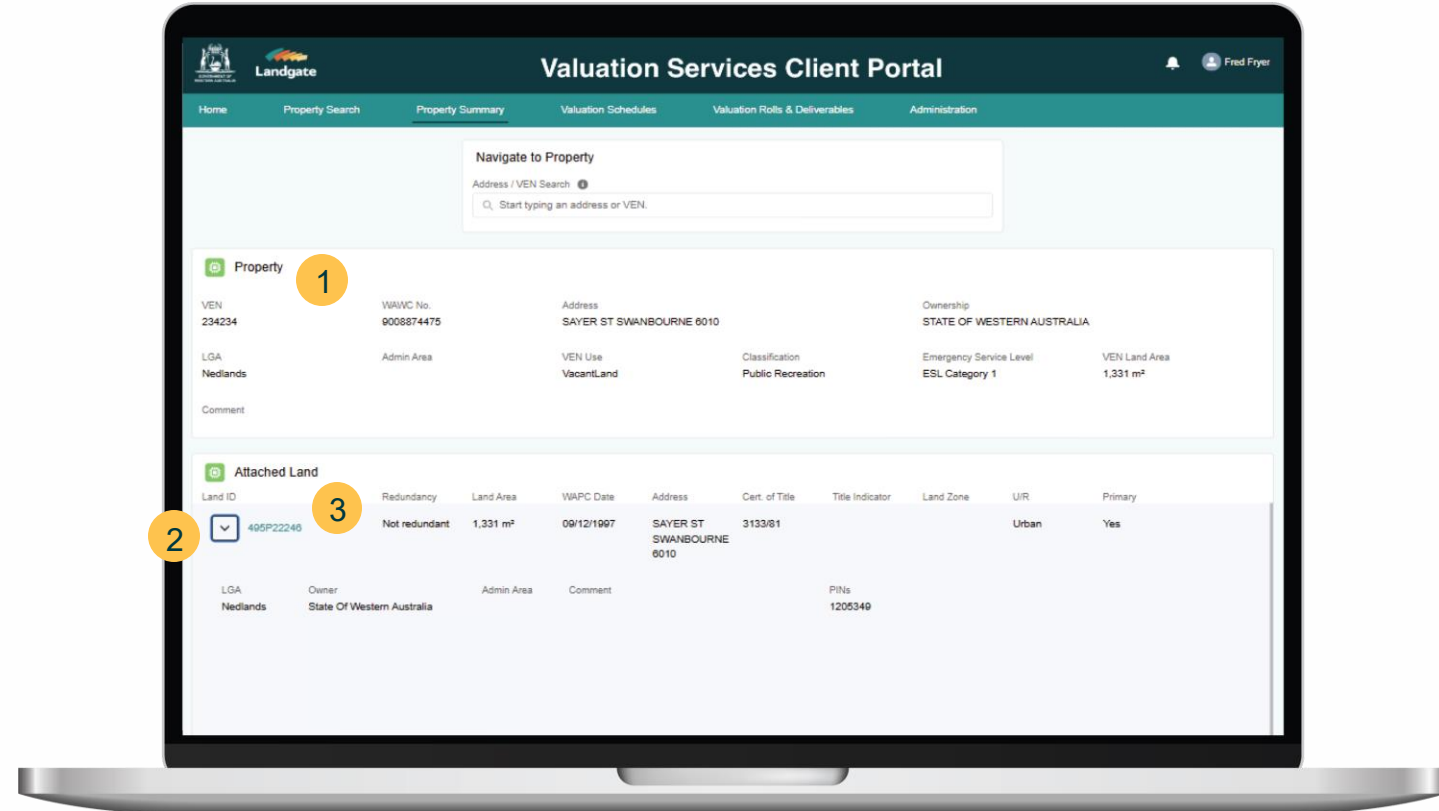
- No data is available or is restricted for the specified field
- Data may be restricted due to certain business rules or criteria not being satisfied





# Property Summary – property details & attached land

- 1 Details of the property are displayed.
- 2 Attached lands can be expanded to display additional detail, such as land ownership, PINs and other information.
- 3 Clicking on the Land ID will take the user to the Land Summary page where the Originating, Resultant or Associated Land details will be displayed.

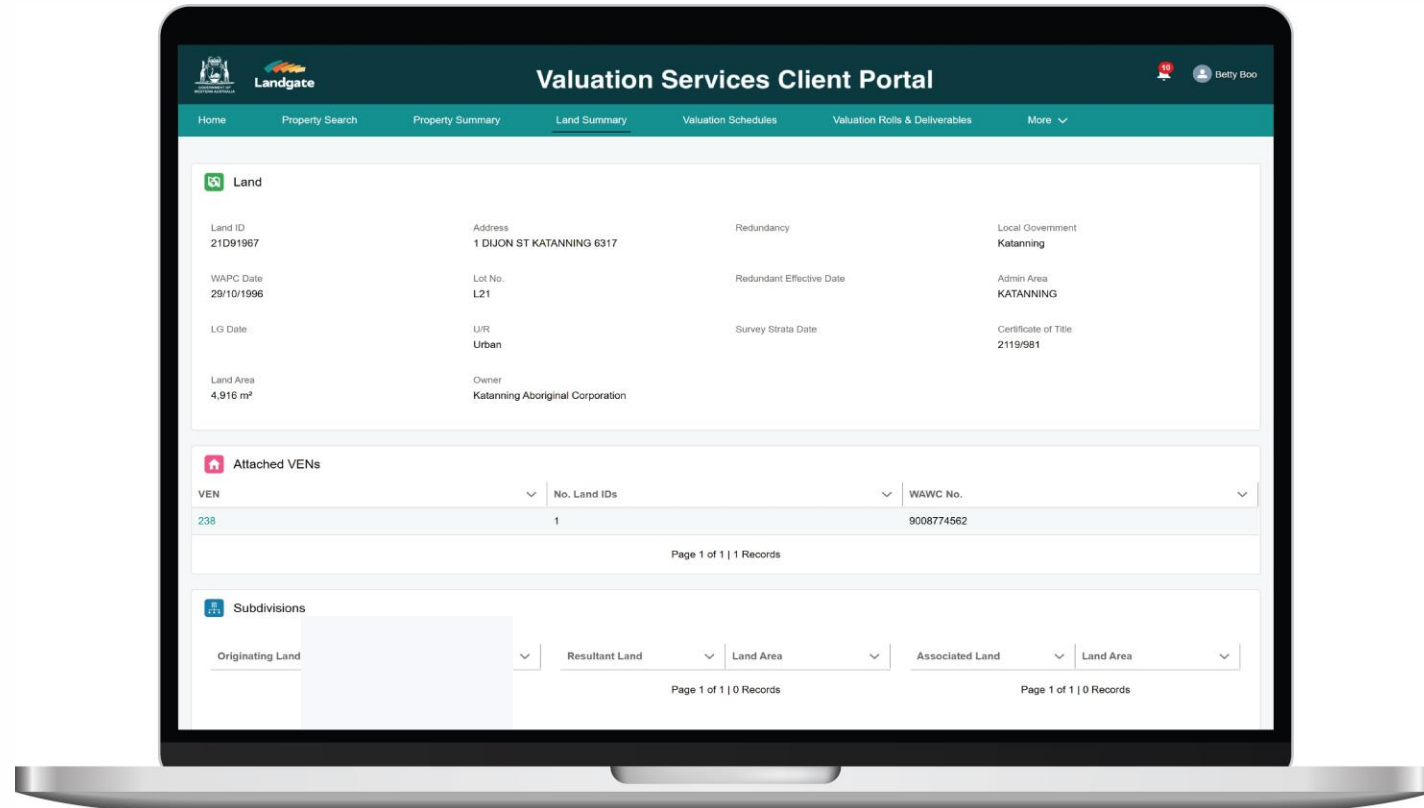




# Property Summary – land summary

The following information sections will be displayed to users for a selected land:

- Land details
- Attached VEN details
- Subdivision details – originating, resultant and associated land information
- Associated VENs





# Property Summary - valuation summary

- 1 The **Valuation Summary** section will only display if the agency that the user is associated with is subscribed to the VEN as a client.  
Only Rating & Taxing UV values will display.

1

Valuation Summary										
Date in force	Valuation Type	Value	Valuation Reason	Rationale	Amendment Type	Amendment ID	Commit Date	UIR	Classification	ESL Category
01/07/2002	GRV	\$14,768	Reval				28/02/2002	Urban	Residential	ESL Category 1
01/07/1999	GRV	\$12,376	Reval				09/01/1999	Urban	Residential	ESL Category 1
01/07/1999	GRV	\$10,192	Reval				09/01/1999	Urban	Residential	ESL Category 1
01/07/1993	GRV	\$9,516	Reval				09/01/1999	Urban	Residential	ESL Category 1

Associated VENs							
VEN	Relation	Status	Address	Classification	Valuation Types	Land IDs	WAWC No.
910765	Child	Active	34 RATHAY ST VICTORIA PARK 6100	Residential	GRV	1547173	9001968743
910766	Child	Active	A/34A RATHAY ST VICTORIA PARK 6100	Residential	GRV	2547173	9001968751



# Property Summary - associated VENs

- 1 Associated VENs will be displayed, when relevant.
- 2 A parent / child relationship will be shown to detail the relationship of the associated VEN to the targeted VEN

01/07/1993	GRV	\$6,250	Reval		00/01/1999	Urban	VacantLand	ESL Category 1
01/07/1993	GRV	\$6,375	Reval		00/01/1999	Urban	VacantLand	ESL Category 1

Associated VENs							
VEN	Relation	Status	Address	Classification	Valuation Types	Land IDs	WAWC No.
1239013	Child	Active	1/33 MCDONALD CR BASSENDEAN 6054	Industrial	GRV	1S34044	9009478575
1239029	Child	Active	2/33 MCDONALD CR BASSENDEAN 6054	Industrial	GRV	2S34044	9009478583
1239030	Child	Active	3/33 MCDONALD CR BASSENDEAN 6054	Industrial	GRV	3S34044	9009478591
1239031	Child	Active	4/33 MCDONALD CR BASSENDEAN 6054	Industrial	GRV	4S34044	9009478604
1239032	Child	Active	5/33 MCDONALD CR BASSENDEAN 6054	Industrial	GRV	5S34044	9009478612
1239033	Child	Active	6/33 MCDONALD CR BASSENDEAN 6054	Industrial	GRV	6S34044	9009478620
1239034	Child	Active	7/33 MCDONALD CR BASSENDEAN 6054	Industrial	GRV	7S34044	9009478639

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Value

## **Client Portal – Valuation Rolls and Other Deliverables**



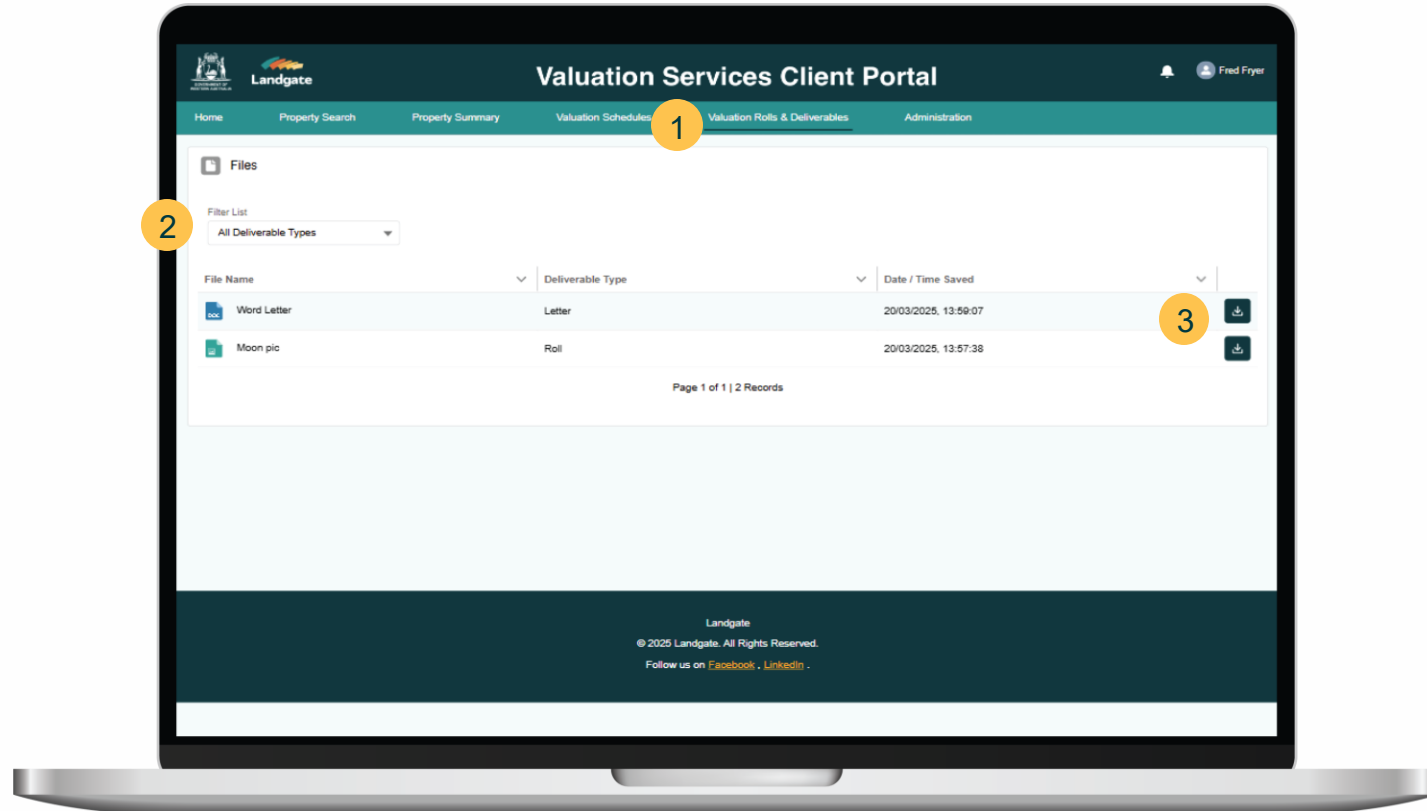


# Valuation Rolls & Other Deliverables

- 1 Users can view the list of files uploaded by Landgate for their agency relating to Valuation Rolls and other 'Valuation Services' deliverables.
- 2 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

RevenueWA

Administrator Users Only



Locate



Value



Secure



Enable



Value

# 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

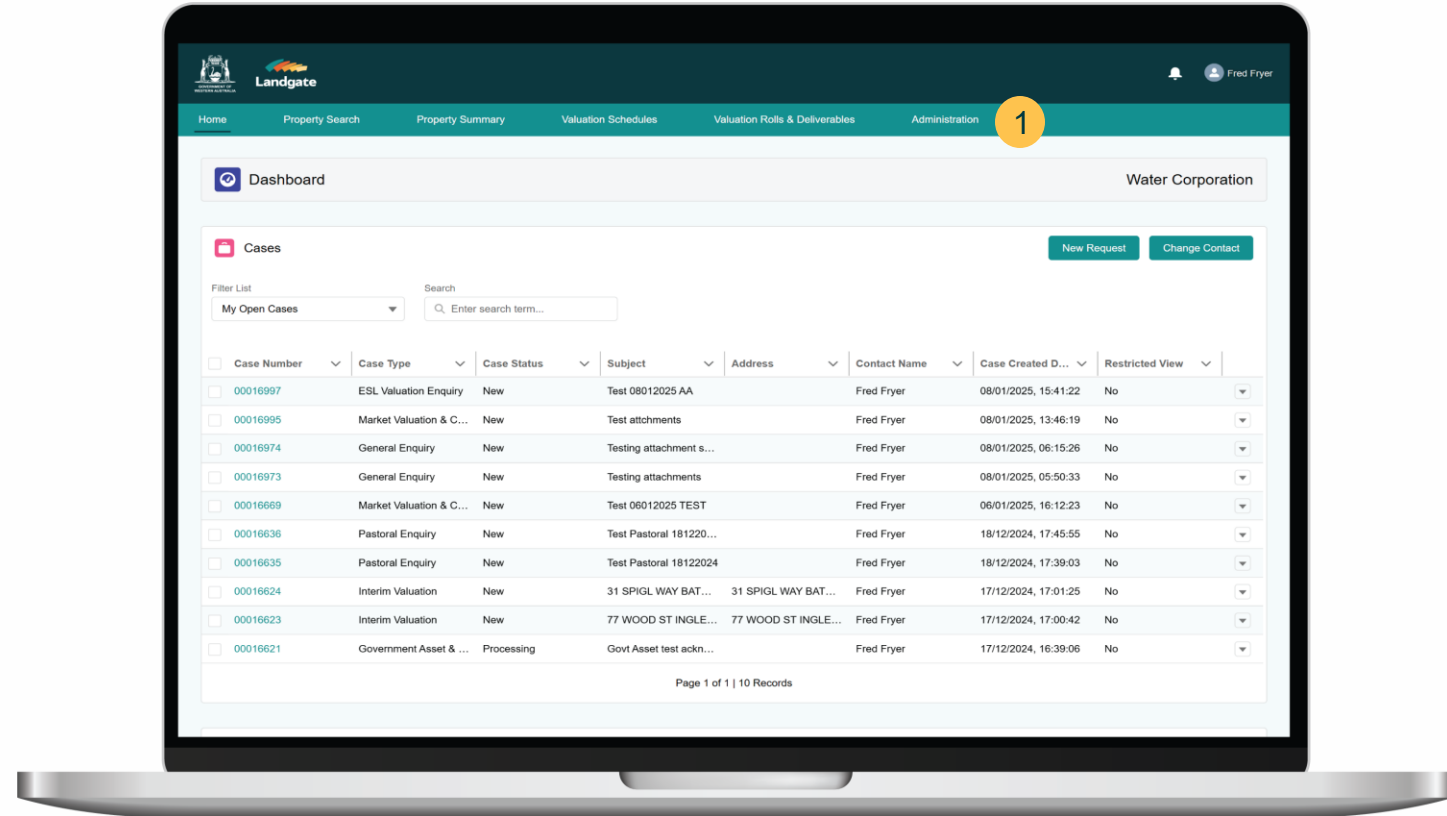
Each agency must maintain **at least two administrators**. You should also consider having administrators that can support specific departments/business teams.

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.



# Accessing Client Portal as an Administrator

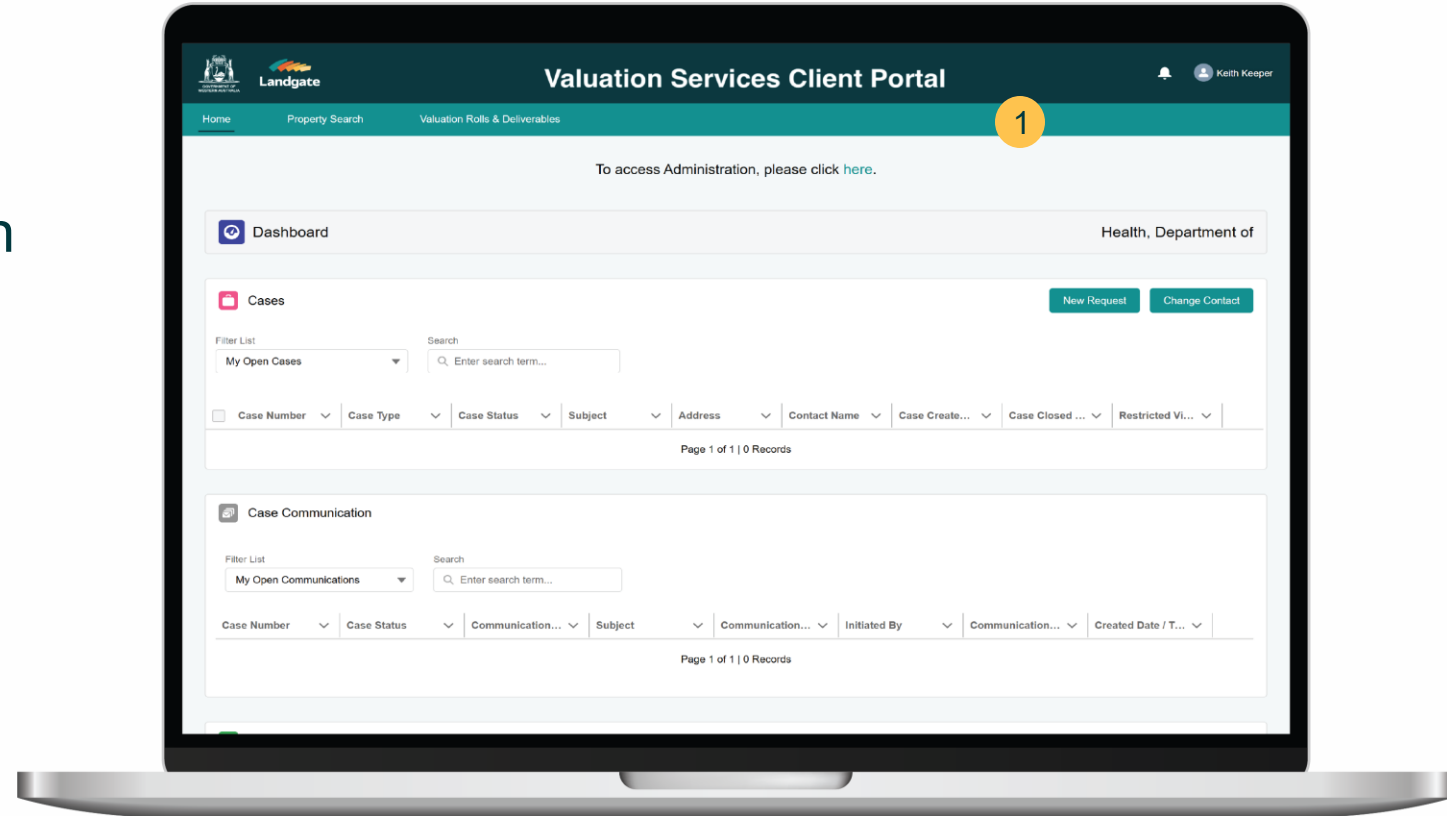
- 1 Users that have the role of an Administrator will have an **Administration** option on the navigation menu. Clicking on the Administration tab will open Administration dashboard.





# Accessing Client Portal as an Administrator

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





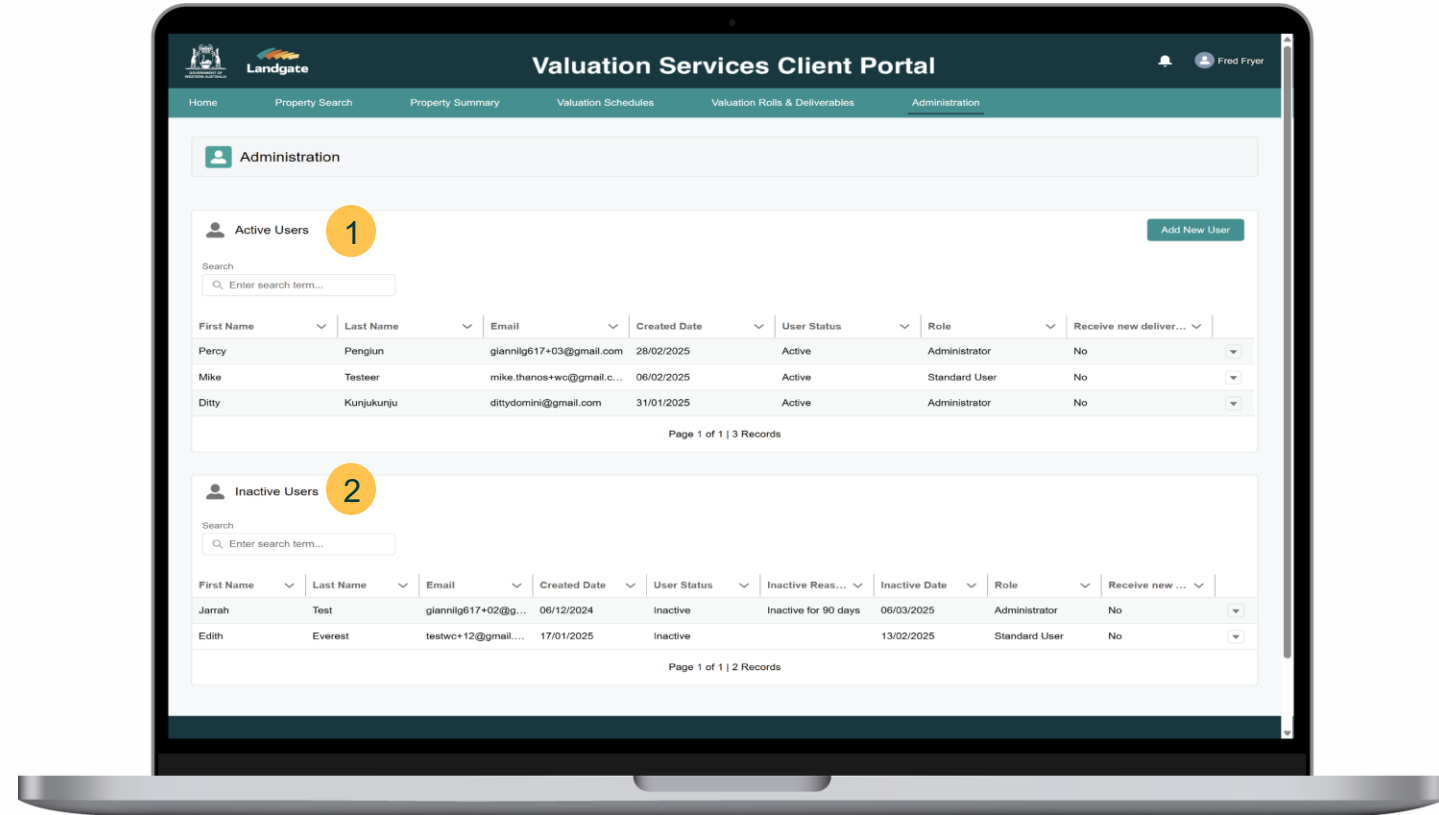


# Administration – dashboard

Administrator dashboard displays:

- 1 • Active users in the agency
- Inactive Users in the agency
- 2 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.

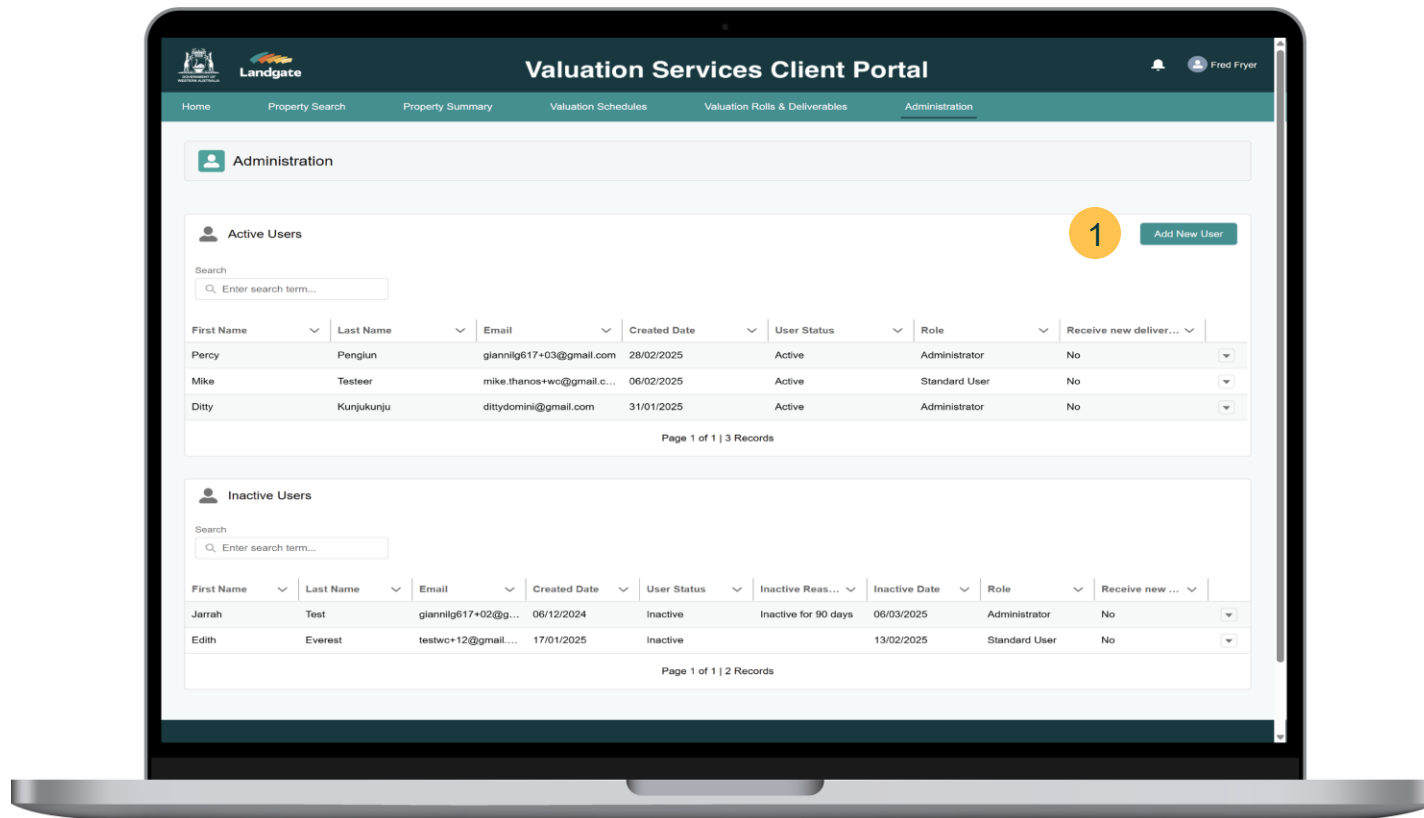






# Administration - create a new user

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





# Administration - create a new user

Administrator enters the details of the new account user.

- 1 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:

- 1 **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.

