



Support Centre Prime Ecosystem

Version Update 25.10.22

Prime Support Centre - Forms

Instructions | How to create a form using a template

DC460 240 Waterworks Rd, Ashgrove, QLD, 4060 (Brisbane Metro)

Some Client | 123 | 1 Linked Job

Forms

Forms External Forms Site Forms

Forms

Form Templates... Form Title... Create New Form

Form Title	Created By	Generated @
Subcontractor Quote Request	Paul Brandis	26th Jul, 2021 12:56 pm
Work Order	Ben Johnston	28th Jul, 2021 11:10 am
Work Order	Ben Johnston	28th Jul, 2021 11:24 am
Estimate Test	Alyson Harris	29th Jul, 2021 11:13 am

Go to Forms

DC460 240 Waterworks Rd, Ashgrove, QLD, 4060 (Brisbane Metro)

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Forms

Forms External Forms Site Forms

Forms

Form Templates... Form Title... Create New Form

Insurance X

Type... X

scope Show All X

Allocation

Form Title	Created By	Generated @
Building Report		2021 12:56 pm
Claim Assessment Report		Generated @ 26th Jul, 2021 12:56 pm
Contact Letter		Generated @ 28th Jul, 2021 11:10 am
Contents Schedule		Generated @ 28th Jul, 2021 11:10 am
Customer Approval		Generated @ 28th Jul, 2021 11:24 am
Endata Form		Generated @ 28th Jul, 2021 11:24 am
Estimate Test		Generated @ 28th Jul, 2021 11:24 am
IAG Builder report - sedgwick		Generated @ 28th Jul, 2021 11:24 am
Induction		Generated @ 28th Jul, 2021 11:24 am
Moisture Schedule		Generated @ 28th Jul, 2021 11:24 am

Search templates

Some Client | 123 1 Linked Job

Summary

- Customer: Scott Harris
- Preferred Number: 0400111222
- Email: No Email
- Site: 240 Waterworks Rd, Ashgrove, QLD, 4060
- Client: Some Client
- Assigned: Alyson Harris
- Case Manager: Alyson Harris
- Supervisor: Alyson Harris
- Estimator: N/A

Filter Menu...

General

- Overview
- Details

Forms

Forms External Forms Site Forms

Template selected

Click Create New Form button

Scope of works customer :

Title	Created by	Generated @
Subcontractor Quote Request	Paul Brandis @ 26th Jul, 2021 12:56 pm	26th Jul, 2021 12:56 pm
Work Order	Ben Johnston @ 28th Jul, 2021 11:10 am	28th Jul, 2021 11:10 am
Work Order	Ben Johnston @ 28th Jul, 2021 11:24 am	28th Jul, 2021 11:24 am
Estimate Test	Alyson Harris @ 29th Jul, 2021 11:13 am	

Some Client | 123 1 Linked Job

Works In Progress

Sensitive Home Uninhabitable

Summary

- Customer: Scott Harris
- Preferred Number: 0400111222
- Email: No Email
- Site: 240 Waterworks Rd, Ashgrove, QLD, 4060
- Client: Some Client
- Assigned: Alyson Harris
- Case Manager: Alyson Harris
- Supervisor: Alyson Harris
- Estimator: N/A

Filter Menu...

General

- Overview
- Details
- Reminders
- Appointments
- Forms
- Finance
- Documents

Forms

Forms External Forms Site Forms

Editable

Forms List

Title	Notes	Linked Document
Scope of works customer sign off	Additional Notes...	No document linked

Autosave enabled Last saved 2nd Aug, 2021 1:38:38 pm

Save & Preview PDF Generate Generate & View

Template * Scope of works customer sign off

Content

Tags Estimate (Working Copy) Estimate (Working Copy) Estimate (Locked) Estimate (Locked)

Paragraph Add Tags/Content Refresh Tags Add Images More

Additional information | want to add to this particular form only

02/08/2021

DC460 240 Waterworks Rd, Ashgrove, QLD, 4060 (Brisbane Metro)

Some Client | 123 | 1 Linked Job

Summary

Customer: Scott Harris
 Preferred Number: 040011222
 Email: No Email
 Site: 240 Waterworks Rd, Ashgrove, QLD, 4060
 Client: Some Client
 Assigned: Alyson Harris
 Case Manager: Alyson Harris
 Supervisor: Alyson Harris
 Estimator: N/A

Filter Menu

General

Overview

Details

Reminders

Appointments

Forms

Finance

Documents

Scope of works customer sign off

Content

Tags: Estimate (Working Copy), Estimate (Pending) X

Paragraph: Add Tags, Select All

Re: 123

YOU CAN TYPE ADDITIONAL INFORMATION OR DETAILS AS REQUIRED.

We has organised repairs to your property located at: 240 Waterworks Rd, Ashgrove, QLD 4060 .

Please find enclosed a copy of your Scope of Works organised by your insurer.

SCOPE OF WORKS

Name: Scott Harris
 Contact No: 040011222

Edit Estimate Refresh

Estimate	Material	Labour	Total
test			
Asbestos Removal			
test: tset	1/ea	5/ea	\$500.00
			\$500.00
Totals			Totals

Additional details can be typed into form.

Select Estimate from drop down. It will appear in form.

DC460 240 Waterworks Rd, Ashgrove, QLD, 4060 (Brisbane Metro)

Some Client | 123 | 1 Linked Job

Summary

Customer: Scott Harris
 Preferred Number: 040011222
 Email: No Email
 Site: 240 Waterworks Rd, Ashgrove, QLD, 4060
 Client: Some Client
 Assigned: Alyson Harris
 Case Manager: Alyson Harris
 Supervisor: Alyson Harris
 Estimator: N/A

Filter Menu

General

Overview

Details

Reminders

Appointments

Forms

Finance

Documents

Scope of works customer sign off

Content

Tags: Estimate (Working Copy), Estimate (Pending) X

Paragraph: Add Tags, Content, Refresh Tags, Add Info

Re: 123

YOU CAN TYPE ADDITIONAL INFORMATION OR DETAILS AS REQUIRED.

We has enclosed a copy of your scope of works

SCOPE OF WORKS

Name: Scott Harris
 Contact No: 040011222

Edit Estimate Refresh

Estimate	Material	Labour	Total
test			
Asbestos Removal			
test: tset	1/ea	5/ea	\$500.00
			\$500.00
Totals			Totals

Click Edit Estimate button

Estimate Options

Estimate Type *
Working Copy

Estimate *
Estimate (Pending) X

Pricing

- Show Material & Labour Totals
- Show Item Total
- Show Category Total
- Show Grand Total

No Prices

Items

- Show Items
- Hide Category Headings
- Show Category Description
- Show Trade Headings
- Show Item Type
- Show Material
- Show Labour
- Authorised Items Only (Sent Estimates Only)

Margin

Show margin in grand total

Select what information you want included on the form by ticking and unticking the check boxes.

Rd, Ashgrove, QLD, 4060 (E

is customer sign off

Working Copy) Estimate (Pending) x

locked) Estimate (Locked)...

Add Tags/Content Refresh Tags Add Image

Scott Harris
0400111222

ate Refresh

te

ps Removal

t

No Prices
Items
 Show Items
 Hide Category Headings
 Show Category Description
 Show Trade Headings
 Show Item Type
 Show Material
 Show Labour
 Authorised Items Only (Sent Estimates Only)
Margin
 X
Tax
 X
Show Only Item Type

 Show Item Tax Status
 Show Category Tag Breakdown
 Show Trade Breakdown
 Show Item Type Breakdown
 Show Pc/ps Items In Separate Table

Cancel Update

Click Update to confirm selections.

Material	Labour	Total
1/ea	5/ea	\$500.00
Totals		
	Sub Total	\$500.00
	Margin	\$150.00
	GST	\$65.00

DC460 240 Waterworks Rd, Ashgrove, QLD, 4060 (Brisbane Metro)

Some Client | 123 | 1 Linked Job

Works in Progress Open

Sensitive Home Uninhabitable

Summary

Customer Scott Harris
Preferred Number 0400111222
Email No Email
Site 240 Waterworks Rd, Ashgrove, QLD, 4060
Client Some Client
Assigned Alyson Harris
Case Manager Alyson Harris
Supervisor Alyson Harris
Estimator N/A

Filter Menu

Forms List

Title Scope of works customer sign off ✓

Notes Additional notes...

Linked Document No document linked

Autosave enabled Last saved 2nd Aug, 2021 2:42:22 pm

Template *
Scope of works customer sign off

Content

Tags
Estimate (Working Copy) Estimate (Pending) x
Estimate (Locked) Estimate (Locked)...

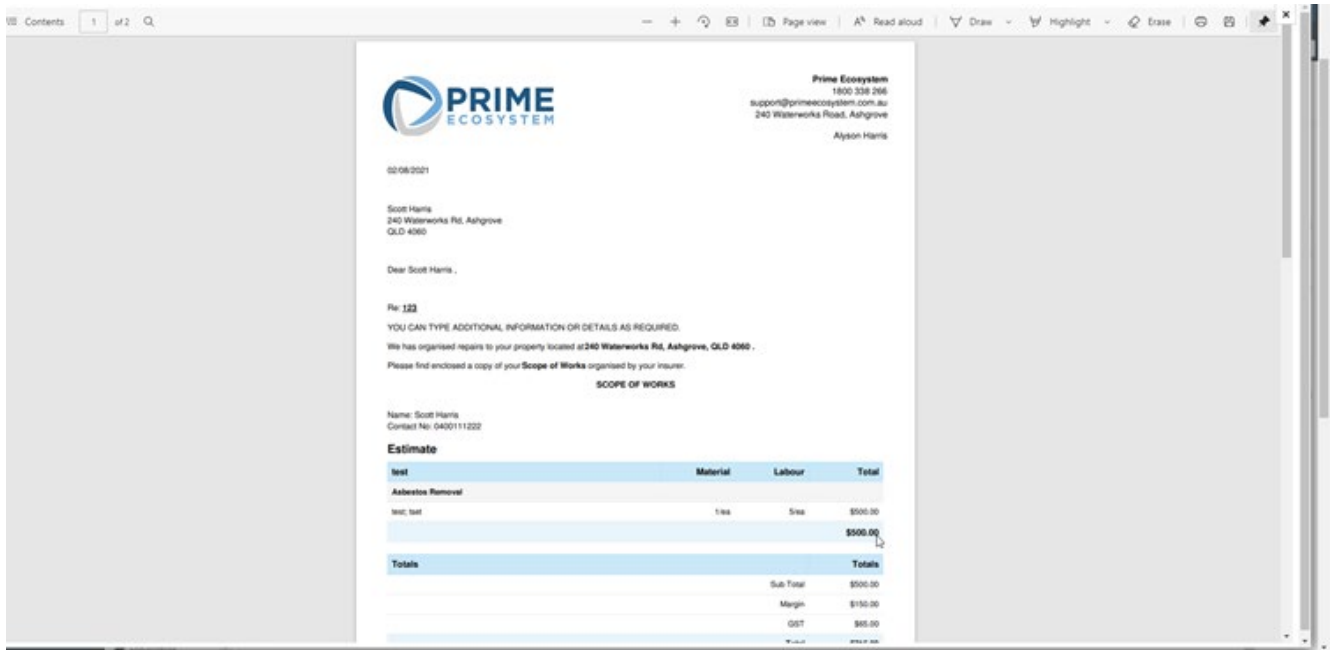
Paragraph Add Tags/Content Refresh Tags Add Images More

02/08/2021

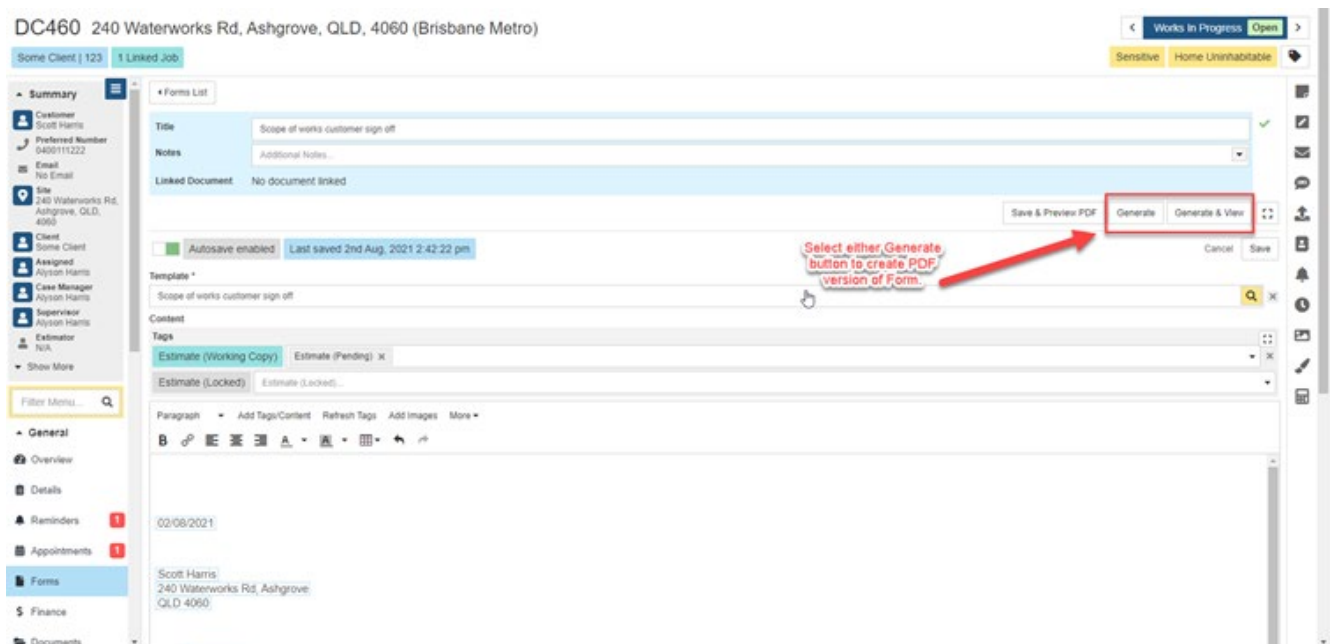
Scott Harris
240 Waterworks Rd, Ashgrove,
QLD 4060

View your form.

Save & Preview PDF Generate Generate & View



- If you are happy with your preview you can select to Generate your form which will finalise it and create a PDF version which can be distributed to customers/clients as required.



When you go back to the Forms list you will now see a PDF icon which you can select to download and view your generated form.

You can also see who created the form and when it was generated into a PDF.

DC460 240 Waterworks Rd, Ashgrove, QLD, 4060 (Brisbane Metro)

Some Client | 123 | 1 Linked Job

Works in Progress Open

Sensitive Home Uninhabitable

Summary

Customer Scott Harris
Preferred Number 9400111222
Email No Email
Site 240 Waterworks Rd, Ashgrove, QLD, 4060
Client Some Client
Assigned Alyson Harris
Case Manager Alyson Harris
Supervisor Alyson Harris
Estimator N/A

Filter Menu

General

Overview

Details

Reminders 1

Appointments 1

Forms

Finance

Documents

Forms

Form Templates... Form Title... Create New Form

Subcontractor Quote Request Subcontractor Quote Request
Created by Paul Brandis @ 26th Jul, 2021 12:56 pm Generated @ 26th Jul, 2021 12:56 pm

Work Order Work Order
Created by Ben Johnston @ 28th Jul, 2021 11:10 am Generated @ 28th Jul, 2021 11:10 am

Work Order Work Order
Created by Ben Johnston @ 28th Jul, 2021 11:24 am Generated @ 28th Jul, 2021 11:24 am

Estimate Test Estimate Test
Created by Alyson Harris @ 29th Jul, 2021 11:13 am

Scope of works customer sign off Scope of works customer sign off
Created by Alyson Harris @ 2nd Aug, 2021 1:27 pm Generated @ 2nd Aug, 2021 1:43 pm

PDF icon

Who created the form and when

When the form was generated

All forms created and/or generated listed

DC460 240 Waterworks Rd, Ashgrove, QLD, 4060 (Brisbane Metro)

Some Client | 123 | 1 Linked Job

Works in Progress Open

Sensitive Home Uninhabitable

Documents

Share Upload Link

Share Documents Link

Group By Document Type Show Obsolete View Photos

Upload Document Sync to Linked Job

Search Documents

0 Filters Selected

Added At

Added By

Document Type

Name

scope_of_works_customer_sign_off_Estimate_pdf
2nd Aug, 2021 1:43 pm Alyson Harris 84 KB Scope of Works

Work Orders

Documents tab

PDF available under specific category dependent on form template used