



Support Centre Prime Ecosystem

Updated 16.1.23

Prime Support Centre

Job Status – Post Approval, Awaiting Maintenance or Awaiting Excess Repair Admin Team

Creating an Excess Payable Invoice –

1. Under the 'Finance' section on the job, select the 'Accounts Receivable Invoices' tab

AJG0091 21 Test Ave, Taren Point, NSW, 2229 (SUTHERLAND SHIRE)

CBA Insurance | Test211222

The screenshot displays the software interface for job AJG0091. On the left is a navigation sidebar with a 'Finance' tab highlighted in green. The main content area shows the 'Finance' section with a sub-tab 'Accounts Receivable Invoices' also highlighted in green. Below this, there are five summary cards for 'Accounts Receivable Invoices', each showing '\$0.00' for Total, Invoiced, Not Invoiced, Invoiced Paid, and Invoiced Not Paid. A search bar and a 'Create' button are visible below the summary cards. A message at the bottom states 'There are no accounts receivables'.

1. Type = Excess
2. To = Customer
3. Select 'Create'

Finance

Summary Authorised Works Summary **Accounts Receivable Invoices** Accounts Payable Invoices Expenses Timesheets

Accounts Receivable Invoices

Summary dashboard showing five categories: Total (\$0.00), Invoiced (\$0.00), Not Invoiced (\$0.00), Invoiced Paid (\$0.00), and Invoiced Not Paid (\$0.00). Below the summary, a form is shown with 'Excess' selected in the type dropdown, 'Customer (Main Contact) - Jesi' in the customer dropdown, and the 'Create' button highlighted.

There are no accounts receivables

4. Under 'Items', leave selection as 'New Item' and type 'Excess Payable Invoice' as the description and click 'Add Item'.

Item selection form showing 'New Item' selected in the type dropdown, 'Excess Payable Invoice' entered in the description field, and the 'Add Item' button highlighted.

5. Under 'Rate', enter the excess amount **excluding GST**. E.g. if the full excess amount to be collected is \$250.00, enter \$227.27.
6. Qty = 1

Total excess amount including GST will update on the right hand site.

Items table showing one row: Excess Payable Invoice. The Rate is 227.27 and Qty is 1. The Subtotal is 227.2700, Tax is 22.7270, and Total is 249.9970. A 'Deduct Excess' button shows a total of \$250.00.

Description	Item Code	Rate	Unit	Qty	Subtotal	Tax	Total
Excess Payable Invoice		227.27	Ea	1	227.2700	22.7270	249.9970

7. Check the 'Due Date' has been prefilled to 14 days from the created date.
8. Select 'Generate PDF'

Invoices table showing one row: INV-192. The Invoice Date is 16 Jan, 2023, and the Due Date is 30 Jan, 2023. The Payment % is 100.0000 %, Invoice Amount is 249.9970, Total is 249.9970, and Status is Draft. A 'Create PDF' button is highlighted.

Invoice Number	Invoice Date	Due Date	Payment %	Invoice Amount	Total	Status	Document Details
INV-192	16 Jan, 2023	30 Jan, 2023	100.0000 %	249.9970	249.9970	Draft	Create PDF

9. Select 'Template', Division = Building, Type = Invoices, Select 'Show All' and select 'Tax Invoice - Customer Excess'

The screenshot shows a search filter interface with the following elements:

- Template ***: A dropdown menu with "Tax Invoice" selected.
- Building**: A dropdown menu with "Building" selected.
- Invoices**: A dropdown menu with "Invoices" selected.
- Search...**: A search input field.
- Show All**: A button.
- Exact Match**: A button.
- Tax Invoice - Customer Excess**: A dropdown menu with "Tax Invoice - Customer Excess" selected.

10. Select 'Generate'

The screenshot shows a software interface with the following elements:

- Save & Preview PDF**: A button.
- Generate**: A button, highlighted with a green box.
- Generate & View**: A button.
- Actions**: A dropdown menu.
- Cancel**: A button.
- S:**: A small icon.

11. Page will refresh and invoice Status will update to 'Pending'

12. To approve the invoice, click on 'Pending' and update the Invoice Status to 'Approved' and select 'Change Status'

The screenshot shows a software interface with the following elements:

- Change Invoice Status**: A dialog box with the following elements:
 - Invoice Status**: A dropdown menu with "Approved" selected.
 - Note**: A text input field.
 - Notify**: A text input field with a search icon.
 - Paige McDonald (Me)**: A text input field.
 - Cancel**: A button.
 - Change Status**: A button.
- Invoice Status**: A dropdown menu with "Pending" selected.
- Item Code**: A table with the following columns: Item Code, Rate, Unit, Qty, Subtotal, Tax, Total.
- Invoice Date**: A table with the following columns: Invoice Date, Due Date, Payment %, Invoice Amount, Total, Status, Document Details.

13. Invoice Status will now be 'Approved' and invoice will transfer to Exo.

Invoices							
Invoice Number	Invoice Date	Due Date	Payment %	Invoice Amount	Total	Status	Document Details
INV-178	9th Jan 2023	23rd Jan 2023	100.0000 %	249.9970	249.9970	Approved	cancel 9th Jan, 2023 3:33:26 pm

If you have incorrectly created an invoice or need to make changes after you have changed the status to 'Approved', please cancel the invoice. This will trigger Prime to send a notification to accounts that the invoice has been cancelled and please recreate the invoice with the correct details.

14. Invoice PDF will now be saved under 'Documents' ready to send to the Insured.

AJG0071 11 Conimbla Crescent, Waterford, VIC, 3862 (ADELAIDE) Post Approval **Open**

Test Client | TEST Only

Show More

Filter Menu...

General

- Overview
- Details
- Reminders
- Appointments
- Forms
- Finance
- Documents**
- History
- Share & Sync

Authorised Works

- Estimates
- Quote Requests

Documents

Share Upload Link New Share Link

Share Documents Link New Share Link

Group By: Document Type Show Obsolete View Photos

Upload Document

Search Documents

0 Filters Selected

Added At:


Added By:

Document Type:

Name:


Contracts

1 Document

	domestic_building_contract_v_i_c.pdf 9th Jan, 2023 3:05 pm Paige McDonald	404 KB Contracts x
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Invoices

1 Document

	tax_invoice_INV-178.pdf 9th Jan, 2023 3:33 pm Paige McDonald	45 KB Invoices x
Preview Download		