



Support Centre Prime Ecosystem

Updated 16.1.23

Prime Support Centre

Job Status - Work in Progress

Repair Supervisor Responsibility

Prime will currently invoice the exact repair estimated amount. When sending out the work orders to the contractors, it is the Repair Supervisors responsibility to ensure the target margin is achieved.

The repair invoice amount cannot be adjusted at completion of the job, without a valid variation.

Reviewing Contractor Invoices

- Contractor will submit invoices via a contractor portal RCTI (Recipient Created Tax invoice)
- Once submitted, the contractor invoice will be listed in the 'Finance' section within the job under the 'Accounts Payable Invoices' tab.

To review the contractor invoice, the Repair Supervisor will:

- Open the job file on Prime and select 'Finance'
- Select 'Accounts Payable Invoice'
- The invoice status will be 'New' and Approval status 'Pending'

AJG0071 11 Conimbla Crescent, Waterford, VIC, 3862 (ADELAIDE) Test Client | TEST Only

Finance

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

Accounts Payable Invoices

\$8,800.00	\$7,040.00	\$0.00	\$7,040.00	\$0.00	\$7,040.00	0%
Work Orders Sell	Work Orders Cost	Invoiced	Not Invoiced	Paid	Not Paid	% Completed

Work Order Number... Assigned Name... Only Active

Group By Assigned Expand All Collapse All

AJG0071-0056 | Completed Neat & Cosy Pty Ltd TEST

Work Order	Work Order Assigned	Work Order Type	Invoice Number	Account No.	Item Code	Amount	Invoiced Date	Due Date	Status	Final Invoice	Approval
AJG0071-0056	Neat & Cosy Pty Ltd TEST	Authorised Works	test201222			\$7,040.00	20th Dec 2022	20th Jan 2023	New	Final Invoice	Pending

If the invoice is as per the estimate or below, the invoice header will be light blue.

Example -

AJG0071 11 Conimbla Crescent, Waterford, VIC, 3862 (ADELAIDE) 📍

Test Client | TEST Only

Finance

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

Accounts Payable Invoices

\$8,800.00	\$7,040.00	\$0.00	\$7,040.00	\$0.00	\$7,040.00	0%
Work Orders Sell	Work Orders Cost	Invoiced	Not Invoiced	Paid	Not Paid	% Completed

Work Order Number... Assigned Name... Only Active Group By Assigned Expand All Collapse All

AJG0071-0056 | Completed Neat & Cosy Pty Ltd TEST Authorised Works 1 Invoice

Work Order	Work Order Assigned	Work Order Type	Invoice Number	Account No.	Item Code	Amount	Invoiced Date	Due Date	Status	Final Invoice	Approval
						\$8,800.00					
						\$7,040.00					
						\$7,040.00					

If invoice is over the estimate, the invoice header will be orange.

Example -

AJG0085 7 Test Ave, Taren Point, NSW, 2229 (SUTHERLAND SHIRE) 📍

RACV Insurance Services Pty Ltd 12 | test123

Finance

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

Accounts Payable Invoices

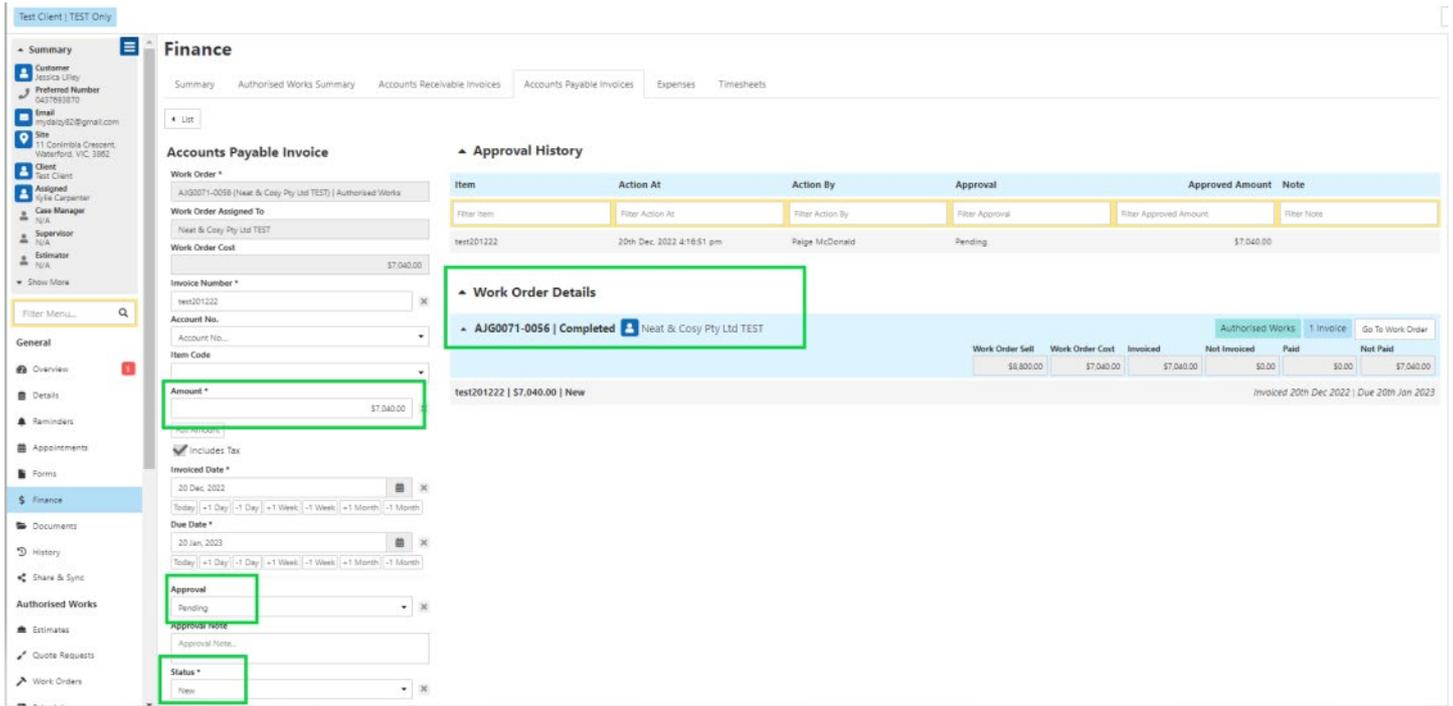
\$696.96	\$580.80	\$294.00	\$286.80	\$0.00	\$580.80	50.62%
Work Orders Sell	Work Orders Cost	Invoiced	Not Invoiced	Paid	Not Paid	% Completed

Work Order Number... Assigned Name... Only Active Group By Assigned Expand All Collapse All

AJG0085-0051 | Completed Neat & Cosy Pty Ltd TEST Authorised Works 1 Invoice

Work Order	Work Order Assigned	Work Order Type	Invoice Number	Account No.	Item Code	Amount	Invoiced Date	Due Date	Status	Final Invoice	Approval
						\$348.48					
						\$290.40					
						\$294.00					

- The Repair Supervisor will be able to review and approve/decline the invoice by clicking on the invoice, which will open the invoice details
- Once the invoice has been opened, invoice details will be displayed as per below



- **Check the Due date is 30 days from the Invoice Created Date. If it isn't, update the due date**
- The Repair Supervisor will review the invoice and either Approve or Decline the invoice, by adjusting the 'Approval' and 'Status'

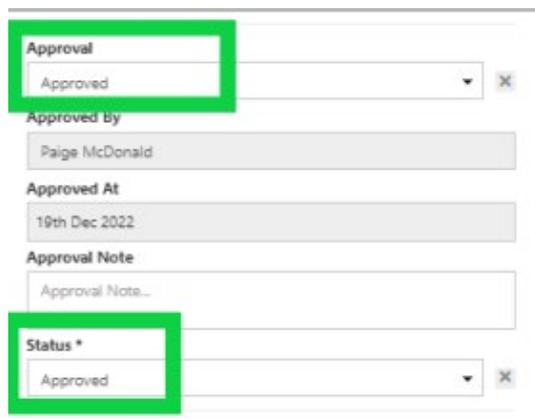
Approval = the status of the contractor invoice (notification will be sent to contractor)

Status = The notification to accounts in reference to the contractor invoice (notification will be sent to accounts)

If you are approving the trade invoice:

Approval = Approved

Status = Approval



If you are declining the invoice:

Approval = Not Approved

Approval Note = Reason for denying the invoice

Status = cancelled

Approval
Not Approved

Approval Note
Approval Note...

Status *
Cancelled

VARIATIONS

If additional work has been required onsite, a variation will need to be created by the Repair Supervisor for the additional scope and the variation estimate sent to contractor – *refer to training video*

Prime will invoice the exact estimated amount, plus any variations created. If the Contractors have exceeded the allowance and no variations have been created, the details of the additional cost must be supplied to the confirm for completion team via the notes section found on the right had side.

1 Hour Behind < Works In Progress Open >

> Add Note To History

Sync Options
Sync this note to a linked contact
Contact...
Sync To Linked Jobs
AJG0042 x

Add Note To History

Template
Template...

Classification *
Internal x

Note *
Note... i

This is required

Public

Create Reminder For
Create Reminder For...
Paige McDonald (Me)

Reset Add Note To History

There are unsaved changes

- Once all invoices are received and the claim is ready to be closed, the Repair Supervisor is to change the Claim status to **Confirm for Completion**.

Job Status - Confirm for Completion

Confirm for Completion Team Responsibility

- The completion report team are to check that all work orders have been invoiced via the Work Orders tab

AJG0085 7 Test Ave, Taren Point, NSW, 2229 (SUTHERLAND SHIRE) Confirm for Completion **Open**

RACV Insurance Services Pty Ltd 12 | test123

Authorised Works

- Estimates
- Quote Requests
- Work Orders**
- Schedules

Allocations

- Allocations
- Allocation Work Orders

Inventory

- Assets/Equipment
- Inventory
- Storage

Summary

- Work Orders Cost Total: \$580.80
- Work Orders Material Total: \$580.80
- Work Orders Labour Total: \$0.00
- Work Orders Not Invoiced: \$290.40

To create a new work order or add to an existing work order select from unallocated authorised estimate items

Go to Create / Unallocated

Work Orders

- Active (2)**

AJG0085-0051 \$290.40 Neat & Cosy Pty Ltd TEST Created by Paige McDonald @ 7th Dec. 2022 3:20 pm	Completed	16.67%	N&CF
AJG0085-0055 \$290.40 Neat & Cosy Pty Ltd TEST Created by Paige McDonald @ 20th Dec. 2022 9:06 am	Completed	16.67%	N&CF

- Cancelled (0)**

- If variations are required, Confirm for Completion team to check the notes under the 'History' tab within the job by filtering Notification Type to 'Note' and Classification to 'Internal'.

General

- Overview
- Details
- Reminders
- Appointments **1**
- Forms
- Finance
- Documents
- History**
- Share & Sync

Authorised Works

- Estimates
- Quote Requests
- Work Orders**
- Schedules

Allocations

- Allocations

History

Search History Reset Search

5 Filters Selected

Date

Most Recent

Action By

Action By... Q

Paige McDonald (Me)

History

History Action

History Action...

Dates

Notifications

Notification Type

Note x

Classification

Internal x

Content

Content...

The overall job Forecast Profit Summary, can be reviewed under the 'Overview' section within the job.

The screenshot displays the user interface for job AJG0069. The top navigation bar includes tabs for Jobs, Calendar, and several job IDs (AJG0063, AJG0062, AJG0065, AJG0069). The main header shows the job title 'AJG0069 5 Sharon Place, Engadine, NSW, 2233 (SUTHERLAND SHIRE)' and a notification for 'WESTPAC GENERAL INSURANCE LIMITED | Test Invoicing PW' with '1 Linked Job' and '1 Important Comment'. A notification from Paul Wepler is shown, dated 20th Nov, 2022, regarding an email to weppstour@hotmail.com.

The 'Overview' section is highlighted in the left sidebar. The 'Forecast Profit Summary' is displayed with the following data:

Overall	
Forecast Profit: \$288.20	Forecast Profit Margin: 16.67%

Authorised Works			
Forecast Profit: \$288.20	Forecast Profit Margin: 16.67%	Authorised Works: \$1,729.20	Work Orders: \$1,441.00

Allocations			
Forecast Profit: \$0.00	Forecast Profit Margin: 0%	Allocations: \$0.00	Work Orders: \$0.00

Once the margin has been reviewed, Confirm for Completion Team to create the repair invoice.

Creating Final Invoice

1. Within the job, select 'Finance' and 'Authorised Works Summary' tab
2. Under 'Ready to Invoice', select the scope lines to invoice. All scope lines to be selected for a final invoice.

AJG0043 240 Waterworks Road, Ashgrove, QLD, 4060 (North Brisbane) 1 Hour Behind Works In Progress

Test Client | Test123456 | 1 Linked Job

Summary

- Customer: Paul Brandis
- Preferred Number: 0403544779
- Email: paul@devcon.tech
- Site: 240 Waterworks Road, Ashgrove, QLD, 4060
- Client: Test Client
- Assigned: Raquel Sportelli
- Case Manager: N/A
- Supervisor: N/A
- Estimator: Alex McHutty

Filter Menu...

General

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- Details
- Reminders
- Appointments
- Forms
- Finance**
- Documents

Finance

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

Authorised Works Summary

Items Expand Collapse

Group By Category

	Estimate Total	Work Order Cost	Allocated	Completed	Invoiced	Ready To Invoice
4 Items	\$3,973.20	\$3,069.00	4	0	0	2
Bedroom 1						
Painting						
Prepare and paint ceiling and cornice to best match existing - 22m2	\$871.20	\$405.00				<input checked="" type="checkbox"/>
Plastering						
Remove and replace ceiling and cornice, set/sand in preparation for paint - 5m2	\$1,115.40	\$929.50				<input checked="" type="checkbox"/>
Bedroom 2						
Painting						
Prepare and paint ceiling and cornice to best match existing - 22m2	\$871.20	\$605.00				<input type="checkbox"/>
Plastering						
Remove and replace ceiling and cornice, set/sand in preparation for paint - 5m2	\$1,115.40	\$929.50				<input type="checkbox"/>

3. Select 'Accounts Receivable Invoices' tab
4. 'Type required' = Authorised Works
5. To = the 'Bill To'. For CBA jobs, the bill to is Hollard Insurance Partners Limited
6. Click 'create'

AJG0085 7 Test Ave, Taren Point, NSW, 2229 (SUTHERLAND SHIRE)

RACV Insurance Services Pty Ltd 12 | test123

Summary

- Customer: Paige McDonald
- Preferred Number: 0403956152
- Email: paige.mcdonald@ajgaustralia.com.au
- Site: 7 Test Ave, Taren Point, NSW, 2229
- Client: RACV Insurance Services Pty Ltd 12
- Assigned: Paige McDonald
- Case Manager: N/A
- Supervisor: N/A
- Estimator: N/A

Filter Menu...

General

- Overview
- Details
- Reminders
- Appointments
- Forms
- Finance**

Finance

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

Accounts Receivable Invoices

\$440.00
Total

\$220.00
Invoiced

\$220.00
Not Invoiced

\$220.00
Invoiced Paid

\$0.00
Invoiced Not Paid

+ Authorised Works **Instructing Client - [REDACTED]** /co/... Account No. ... **Create**

Assessment Fee | RACV Insurance Services Pty Ltd 12 **\$220.00 paid of \$220.00**

Created by Paige McDonald @ 7th Dec, 2022 1:52 pm INV-155

Assessment Fee | RACV Insurance Services Pty Ltd 12 Draft \$0.00 paid of \$220.00

Created by Paige McDonald @ 20th Dec, 2022 3:03 pm INV-165

- Under 'Items' select 'Estimate'
- Select the Authorised Estimate from the drop down. You can invoice multiple authorised estimates together or separately
- Select 'Add item'

Summary Authorised Works Summary Accounts Receivable Invoices Accounts Payable Invoices Expenses

Accounts Receivable Invoices

◀ List

\$0.00

Total

\$0.00

Invoiced

\$0.00

Not Invoiced

\$0.00

Invoiced Paid

\$0.00

Invoiced Not Paid

Authorised Works

To: Instructing Client - RACV Insurance Services Pty Ltd 12

co/:

Account Number: Account No. ...

Notes: Additional Notes...

Items

+ Estimate Estimate 2022-12-07 15:19:50 (348.48) As One Item Add Item

- Edit the 'Description', if required
- Select 'Deduct Excess' if there is an excess applicable.

Authorised Works

To: Instructing Client - RACV Insurance Services Pty Ltd 12

co/:

Account Number: Account No. ...

Notes: Additional Notes...

Items

+ Estimate Select from Authorised Work... As One Item Add Item Deduct Excess \$348.48

Description	Item Code	Rate	Unit	Qty	Subtotal	Tax	Total
Estimate 2022-12-07 15:19:50							
Estimate Estimate 2022-12-07 15:19:50	Item Code...	316.8	Ea	x 1	316.8000	31.6800	348.4800

- Select 'Create PDF'
- Select 'Template', Division = Building, Type = Invoices, Select 'Show All' and select 'Tax Invoice'

Forms

◀ List Go Back To Accounts Receivable

Title: Title...

Notes: Additional Notes...

Linked Document: No document linked

Autosave enabled

Save & Preview PDF Generate Generate & View Actions

Cancel Save

Template: Building Invoices Tax Invoice

Show All Exact Match

14. Select 'Save and Preview PDF'
15. Invoice will then be displayed
16. Close window and click 'Generate'
17. Invoice status will move from 'Draft' to 'Pending'
18. Select 'Pending' to be update the invoice status to 'Approved' which will trigger the API to our accounting software

Authorised Works

To: Instructing Client - RACV Insurance Services Pty Ltd 12

co/:

Account Number: Account No. ...

Notes: Additional Notes...

Items \$348.48

Description	Item Code	Rate	Unit	Qty	Subtotal	Tax	Total
Estimate 2022-12-07 15:19:50							
Estimate Estimate 2022-12-07 15:19:50	Item Code...	316.8	Ea	x 1	316.8000	31.6800	348.4800

Invoices

Invoice Number	Invoice Date	Due Date	Payment %	Invoice Amount	Tot	Status	Document Details
INV-167	21st Dec 2022	No Due Date	100.0000 %	348.4800	348.4800	Pending	21st Dec. 2022 9:39:46 am

1 Invoice 348.4800

19. Copy of the invoice will be under 'Documents' tab
20. Locate the invoice and upload to Estimage
21. Job status to be updated 'Invoiced' status

Creating Progress Claim Invoice

Responsibility of Repair Supervisor

1. Within the job, select 'Finance' and 'Authorised Works Summary' tab
2. Under 'Ready to Invoice', select the scope lines to be invoiced as a progress claim

Finance

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

Authorised Works Summary

Items	Estimate Total	Work Order Cost	Allocated	Completed	Invoiced	Ready To Invoice
4 Items	\$3,973.20	\$3,069.00	4	0	0	2
Bedroom 1						
Painting	Estimate 2022-11-07 09:02:59 AJG0043-0028	\$871.20	\$605.00	✓		✓
Prepare and paint ceiling and cornice to best match existing - 22m2						
Plastering	Estimate 2022-11-07 09:02:59 AJG0043-0028	\$1,115.40	\$929.50	✓		✓
Remove and replace ceiling and cornice, set/sand in preparation for paint - 5m2						
Bedroom 2						
Painting	Estimate 2022-11-07 09:02:59 AJG0043-0028	\$871.20	\$605.00	✓		
Prepare and paint ceiling and cornice to best match existing - 22m2						
Plastering	Estimate 2022-11-07 09:02:59 AJG0043-0028	\$1,115.40	\$929.50	✓		
Remove and replace ceiling and cornice, set/sand in preparation for paint - 5m2						

3. Select 'Accounts Receivable Invoices' tab
4. 'Type required' = Authorised Works
5. To = the 'Bill To'. For CBA jobs, the bill to is Hollard Insurance Partners Limited
6. Click 'create'

AJG0085 7 Test Ave, Taren Point, NSW, 2229 (SUTHERLAND SHIRE)

Finance

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

Accounts Receivable Invoices

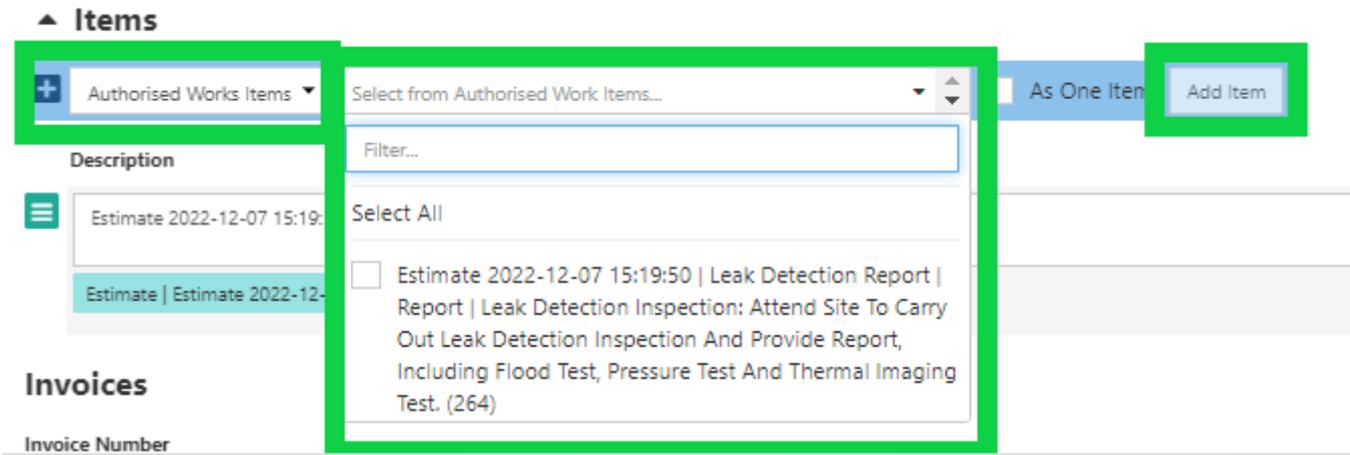
\$440.00	\$220.00	\$220.00	\$220.00	\$0.00
Total	Invoiced	Not Invoiced	Invoiced Paid	Invoiced Not Paid

+ Authorised Works Instructing Client - [redacted] co/... Account No. ... **Create**

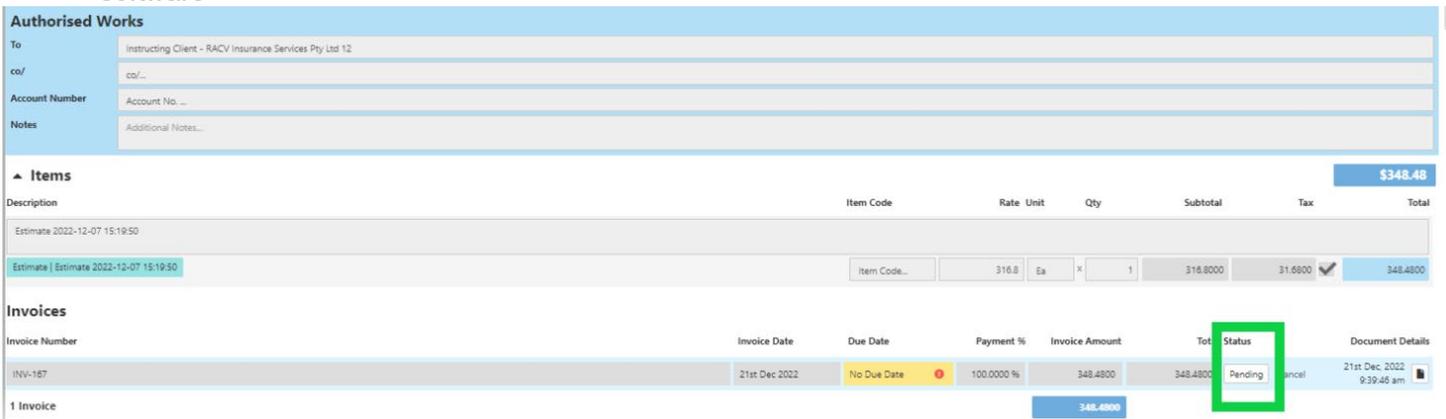
Assessment Fee | RACV Insurance Services Pty Ltd 12 \$220.00 paid of \$220.00
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Assessment Fee | RACV Insurance Services Pty Ltd 12 Draft \$0.00 paid of \$220.00
Created by Paige McDonald @ 20th Dec, 2022 3:03 pm INV-165

7. 'Type required' = 'Authorised Works Items Ready To Invoice' and select scope items previously selected 'Ready To Invoice'
8. Select 'Add Item/s'



9. Edit the 'Description', if required
10. Select 'Create PDF'
11. Select 'Save and Preview PDF'
12. Invoice will then be displayed
13. Close window and click 'Generate'
14. Invoice status will move from 'Draft' to 'Pending'
15. Select 'Pending' to be update the invoice status to 'Approved' which will trigger the API to our accounting software



16. Copy of the invoice will be under 'Documents' tab
17. Locate the invoice and upload to Estimage

Job Status Invoiced
Responsibility of Finance Department

- Reporting from Prime will flag Prime claims that are in 'Invoiced' status and an invoice should have synced with EXO.
- Finance will check EXO and confirm the invoice details on Exo match that of the report received from Prime

Assessment Reports, Roof Reports, Leak Location Reports, Specialist Reports and Excess invoices

Operations will create invoices within Prime for:

- Assessment Reports
- Roof Reports
- Leak Location Reports
- Specialist Reports
- Excess

When Operations move these invoices to 'Approved' statuses, the invoices will sync with EXO. Once the invoice has synced in Exo, the invoice status within Prime will update to 'Sent'. Invoice reporting will be created from Prime listing invoices in 'Sent' status for Finance for reconcile.