



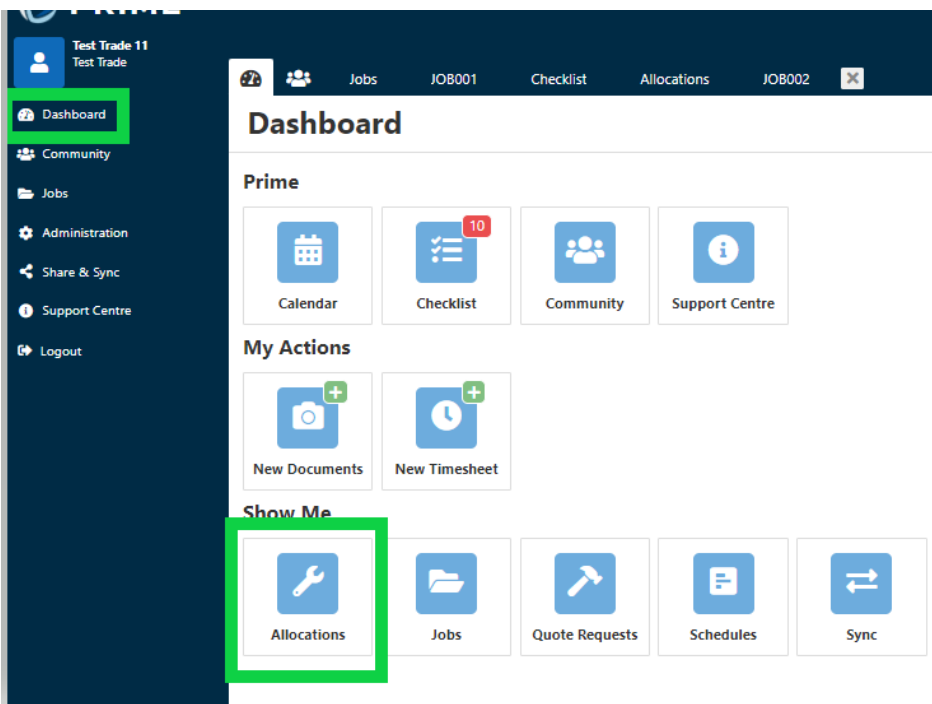
Support Centre Prime Ecosystem

Updated 27.01.23

Prime Support Centre

Trade Invoicing an Allocation

1. Open Prime
2. Select 'Dashboard' and 'Allocations'



3. Select the allocation from the list that you are invoicing

Allocations

Reference Number	Label	Job Number	Client	Assigned Contact	Assigned To	Allocation Type	Allocation Status	Tags
AJG0102-0097		JOB002	AJG Australia			Work Order	Ready To Invoice	
AJG0102-0084		JOB002	AJG Australia			Work Order	Ready To Invoice	

4. Update the completed date, time and any other details not already filled in and click 'Update'

Allocation Type *
Work Order

Label *
AJG0102-0097

Assign To Contact
Assign To Contact...

Limit
\$0.00

Instructions
Allocation Work Order

Customer First Contacted On
24 Jan, 2023
Today +1 Day -1 Day +1 Week -1 Week +1 Month -1 Month

Customer First Contacted Time
09:42 AM
Now +15 Min -15 Min +1 Hour -1 Hour Nearest Hour
Start Of Day End Of Day

Site Attended / Start
25 Jan, 2023
Today +1 Day -1 Day +1 Week -1 Week +1 Month -1 Month

Site Attended / Start Time
06:27 AM
Now +15 Min -15 Min +1 Hour -1 Hour Nearest Hour
Start Of Day End Of Day

Completed
25 Jan, 2023
Today +1 Day -1 Day +1 Week -1 Week +1 Month -1 Month

Completed Time
07:44 AM
Now +15 Min -15 Min +1 Hour -1 Hour Nearest Hour
Start Of Day End Of Day

Works Completed
Completed make safe to roof - tarp front

Update

5. Select 'Change Status' and update the allocation status to 'ready to be invoiced'

Summary AJG0102-0097 Work Order Show All Hide All

Work Order | AJG0102-0097 Ready To Invoice **Change Status**

Created by Test Trade @ 25th Jan, 2023 9:40 am

6. Scroll down to the 'Allocation Estimate' and update the material and labour to your invoiced amount. Your invoice will be created based on the amount entered

The screenshot shows an 'Allocation Estimate' interface. It lists two items: 'Roof' and 'Roof Tiler'. Each item has a table for 'Material' and 'Labour' costs. The 'Roof' item shows a total of \$170.00, with \$70.00 for Material and \$100.00 for Labour. The 'Roof Tiler' item also shows a total of \$170.00, with \$70.00 for Material and \$100.00 for Labour. A green box highlights the 'Material' and 'Labour' rows for the 'Roof Tiler' item, showing the unit and quantity columns.

7. Check the 'Total' is correct and then 'Lock' the estimate

The screenshot shows the 'Allocation Estimate' summary page. The label is 'AJG0102-0097'. A green box highlights the 'Lock' button in the top left corner. Another green box highlights the 'Total' button in the top right corner, which shows a total value of '\$187.00'. The page also shows a 'Margin Total' of '\$0.00'.

8. Click on the 'Finance' section and 'New Accounts Receivable Invoice'

The screenshot shows the 'Finance' section of a software interface. The main heading is 'Accounts Receivable Invoices'. Below this, there are five summary cards: 'Total' (\$495.00), 'Invoiced' (\$495.00), 'Not Invoiced' (\$0.00), 'Invoiced Paid' (\$0.00), and 'Invoiced Not Paid' (\$495.00). A green box highlights a button labeled 'New Accounts Receivable Invoice'. On the left sidebar, the 'Finance' menu item is also highlighted with a green box.

9. Select the allocation you are invoicing under 'Items'

Accounts Receivable Invoices

[← List](#)

Sync Options
 Sync This Invoice To Ajg Australia

To *
AJG Australia

Type *
Allocations

Items *
Items...
AJG0102-0066
AJG0102-0084
AJG0102-0097

Issuing Date *
25 Jan, 2023
Today +1 Day -1 Day +1 Week -1 Week +1 Month -1 Month

Due Date *
Due Date...
Today +1 Day -1 Day +1 Week -1 Week +1 Month -1 Month

Document *
Document...
[Upload & Link New Document](#)

[Cancel](#) [Save](#)

- Check 'sync this invoice to AJG Australia' is ticked, enter the invoice number, invoice date and due date (30 days), select the purchase order document and click 'Save'

Sync Options

Sync This Invoice To Ajg Australia

To *
AJG Australia

Type *
Allocations

Items *
AJG0102-0097

Invoice Number *
test25123

Invoice Date *
25 Jan, 2023

Today +1 Day -1 Day +1 Week -1 Week +1 Month -1 Month

Due Date *
25 Feb, 2023

Today +1 Day -1 Day +1 Week -1 Week +1 Month -1 Month

Document *

- Document...
- Site Document - purchase_order_AJG0101-0063_Test_Trade.pdf
- Site Document - purchase_order_AJG0102-0066_Test_Trade_11.pdf
- Site Document - purchase_order_AJG0101-0067_Test_Trade_11.pdf
- Site Document - test_cost_calculator.xlsx
- Site Document - Test_resto_assessment_report.pdf
- Site Document - purchase_order_AJG0102-0084_Test_Trade_11.pdf
- Site Document - purchase_order_AJG0102-0084_Test_Trade_11.pdf
- Site Document - purchase_order_AJG0102-0097_Test_Trade_11.pdf

- Invoice will automatically sync to AJG Australia and invoice will now be displayed under the finance section of the job

JOB002 1 Test Ave, Taren Point, NSW, 2229

AJG Australia | AJG0102 Synced To AJG Australia

Summary

Customer
Test Test

Preferred Number
0403958152

Email
paige.mcdonald@ajgaustralia.com.au

Site
1 Test Ave, Taren Point, NSW, 2229

Client
AJG Australia

Assigned
Test Trade

Case Manager
Test Trade

Supervisor
N/A

Show More

Filter Menu...

General

Details

Forms

Finance

Documents

Finance

Accounts Receivable Invoices

Accounts Receivable Invoices

\$682.00	\$682.00	\$0.00	\$0.00	\$682.00
Total	Invoiced	Not Invoiced	Invoiced Paid	Invoiced Not Paid

New Accounts Receivable Invoice

Allocations | AJG Australia co/ AJG Australia

Created by Test Trade @ 25th Jan, 2023 10:02 am

\$0.00 paid of \$187.00

test25123

Allocation | AJG0102-0097