



Support Centre Prime Ecosystem

Updated 22.12.22

Prime Support Centre

Job Status – Awaiting Submission

Assessing Admin Team

Preparing documents to send to the Insurance Company

Select the 'Documents' tab within the job

If an assessment report has been completed and approved, this will display under 'Reports'.

If a scope of works has been created and 'locked', it will be displayed under 'Scope of Works'.

If an invoice/s has been created, it will be displayed under 'Invoices'.

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

CBA Insurance | Test211222 Awaiting Submission [Open](#)

Search Documents Reset Search

0 Filters Selected

Documents (highlighted in green)

- Invoices** (highlighted in green) 1 Document
tax_invoice_INV-176.pdf 45 KB Invoices
Added At: 21st Dec, 2022 4:51 pm
Added By: Paige McDonald
Preview Download
- Reports** (highlighted in green) 1 Document
assessment_report.pdf 47 KB Reports
Added At: 9th Jan, 2023 4:42 pm
Added By: Paige McDonald
Preview Download
- Scope of Works** (highlighted in green) 1 Document
scope_of_works_Estimate_2022-12-21_15_23_47.pdf 42 KB Scope of Works
Added At: 21st Dec, 2022 3:24 pm
Added By: Paige McDonald
Preview Download

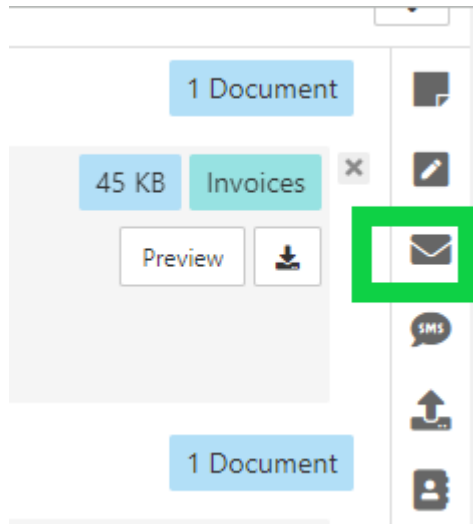
If you are uploading the documents to a portal

1. Select the 'Download' button next to each of the required documents.
2. Proofread and check the documents are correct, then save to your desktop
3. Upload to the IC portal
4. Update the job status

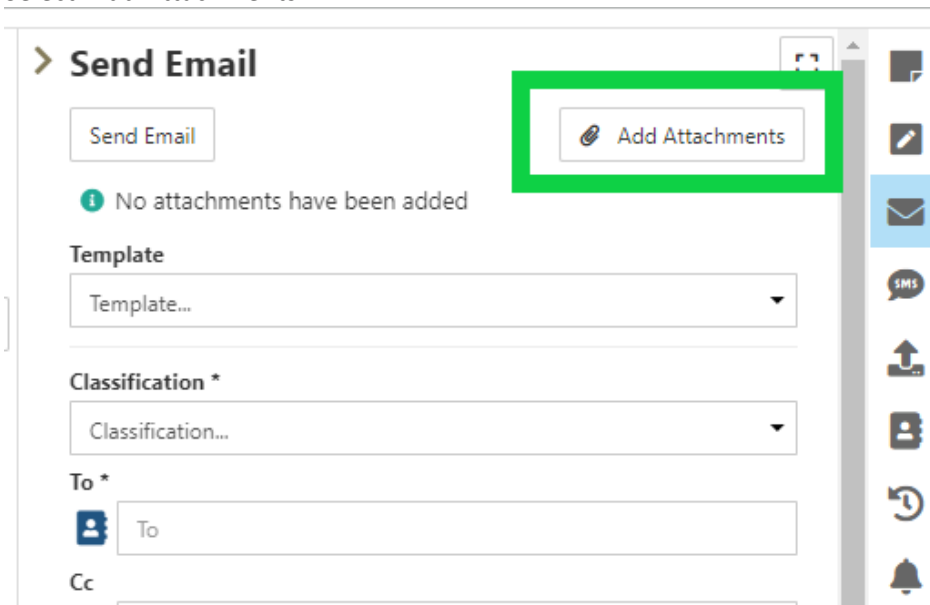
The screenshot displays the AJG0091 portal interface for a job titled "21 Test Ave, Taren Point, NSW, 2229 (SUTHERLAND SHIRE)". The interface includes a sidebar with navigation options such as Reminders, Appointments, Forms, Finance, Documents, History, Share & Sync, Authorised Works, Estimates, Quote Requests, Work Orders, Schedules, and Allocations. The main content area is divided into sections for Invoices, Reports, and Scope of Works. Each section lists documents with their names, upload dates, and authors. For example, under Invoices, there is a document named "tax_invoice_INV-176.pdf" uploaded on 21st Dec, 2022 at 4:51 pm by Paige McDonald. Under Reports, there is "assessment_report.pdf" uploaded on 9th Jan, 2023 at 4:42 pm by Paige McDonald. Under Scope of Works, there is "scope_of_works_Estimate_2022-12-21_15_23_47.pdf" uploaded on 21st Dec, 2022 at 3:24 pm by Paige McDonald. A dropdown menu is open in the top right corner, showing job status options: Not Proceeding, Awaiting Insurer, Cash Settled, Post Approval, and Submitted to be Finalised. The "Open" button in the top right is highlighted in green. Additionally, the "Download" buttons (represented by a download icon) for the "assessment_report.pdf" and "scope_of_works_Estimate_2022-12-21_15_23_47.pdf" documents are highlighted with green boxes.

If you are emailing the documents

1. Select 'Send Email' on the right-hand side panel.



2. Select 'Add Attachments'



3. Click on the heading/s of the documents required to be sent

Add Attachments To Email ✕

Add Attachments

0 Selected Select All Select None

Group By Document Type Gallery Expand All Collapse All




- Company Documents** 9 Documents
- Contracts** 2 Documents
- Invoices** 1 Document
- Reports** 1 Document
- Scope of Works** 1 Document

Cancel Add Attachments

4. Select the document/s to send and click 'Add Attachments'


3 Selected Select All Select None

Group By Document Type Gallery Expand All Collapse All




- Company Documents** 9 Documents
- Contracts** 2 Documents
- Invoices** 1 Document
 -  tax_invoice-_customer_excess_INV-179.pdf 50 KB Invoices
10th Jan, 2023 11:12 am
Prime Admin ↓
- Reports** 1 Document
 -  assessment_report.pdf 46 KB Reports
10th Jan, 2023 12:06 pm
Paige McDonald ↓
- Scope of Works** 1 Document
 -  scope_of_works.pdf 44 KB Scope of Works
10th Jan, 2023 11:07 am
Prime Admin ↓

Cancel Add Attachments

5. Attachments will now be added to the email, ready to send

> Send Email 

Total Attachment Size 140.00 KB

 scope_of_works.pdf 10th Jan, 2023 11:07:46 am	50 KB	<input type="button" value="x"/>
 tax_invoice-_customer_excess_INV-179.pdf 10th Jan, 2023 11:12:11 am	46 KB	<input type="button" value="x"/>
 assessment_report.pdf 10th Jan, 2023 12:06:53 pm	44 KB	<input type="button" value="x"/>

Template

Classification *

To *