



Support Centre Prime Ecosystem

Updated 16.01.23

Prime Support Centre

Job Creation - CST

Effective Monday 28 November 2022, All COMMINSURE jobs via Estimage will be auto created in Prime as soon as the request is allocated to AJ Grant.

Stage 1 implementation for Prime is **QLD ONLY jobs for Comminsure**, therefore, CST will need to follow the below steps to ensure both Prime, BuildPRO and RestoPRO are accurately updated.

1. Non-QLD Jobs for Comminsure

For any Comminsure jobs located in other States (not Queensland), please open the job file in Prime and:

- Update the status, located on the far RHS to **PROGRESSING IN BP**



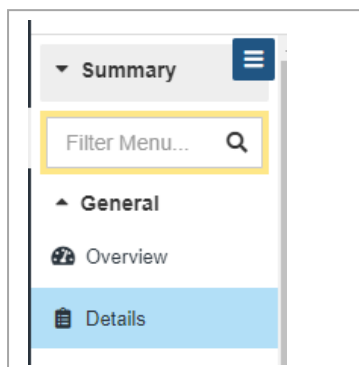
- Upload job note – *Job file progressing in either BuildPRO or RestoPRO – please do not action in Prime.*

Please DO NOT select to SYNC TO ESTIMAGE, otherwise this job note will automatically transfer to Estimage.

- Manually create a job file in BuildPRO and/or RestoPRO as required, following your usual process. The file you create in BP and/or RP will be the job file the operational team uses to manage this job.

2. QLD Jobs for Comminsure

- Open the job file in Prime and select DETAILS on the SUMMARY panel located on the LHS of the page.



- ensure all client, customer and claim details aligns with the BIF.
- ensure the correct workflow is applied to the job file, you can select from either Insurance-Building or Restoration

Job

Change Job Number Change Workflow

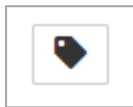
Job Number

AJG0075

Workflow

Insurance - Building

- if a claim has been flagged as either 'sensitive', 'vulnerable customer', 'temporary accommodation', please create a **TAG** by selecting the tag icon located on the far RHS of the page.



Please select the appropriate TAG via the drop-down list

Link Tags

Tags... ^ v

Filter...

Select All

- Complaint
- Critical
- Express
- Major Loss
- Mid Loss
- Sensitive
- Temporary Accommodation
- Uninhabitable
- Vulnerable Customer

- Please assign the job file to **EMMA ENSINGER** in the bookings team

Details

Type *

Assessment x

Description *

EOL x

Division *

Building x

Peril *

Escape of Water x

Catastrophe *

No catastrophe x

Assigned *

Emma Ensinger Q x

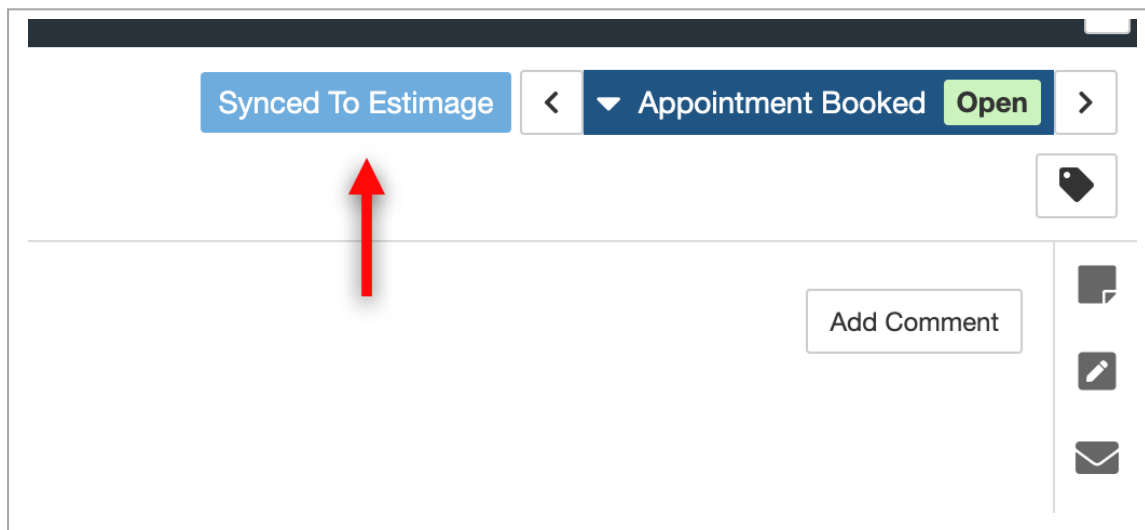
- Follow your usual process to notify the bookings team, restoration and make safe teams (if required).

- Manually create a duplicate job file in BuildPRO and/or RestoPRO, including all client, customer & claim details and update the job status to **PROCEEDING IN PRIME (DO & CHARGE)**. This is a back-up job file only and will not be used to manage the job.

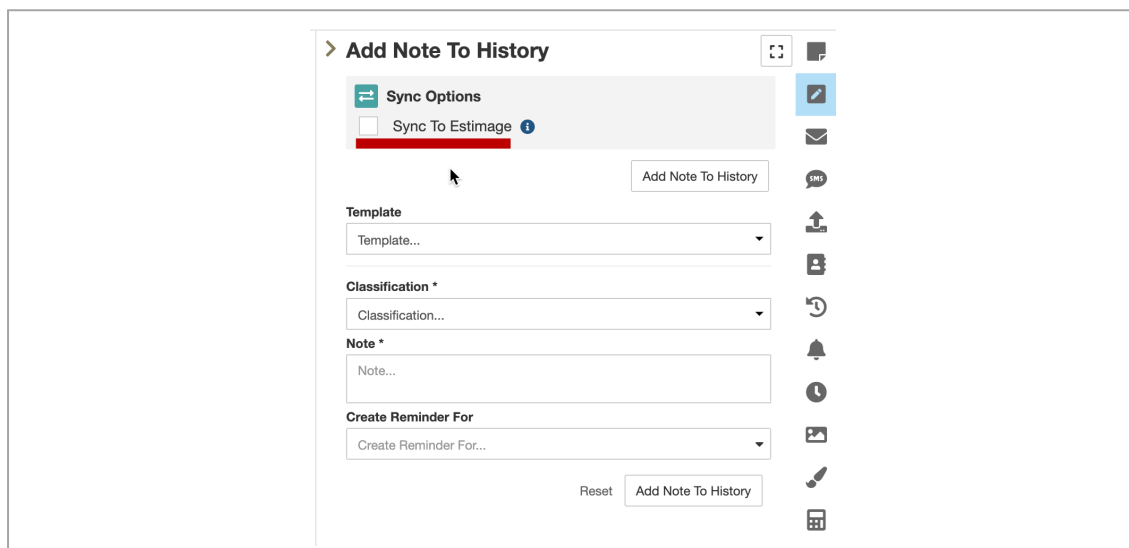


- Upload job note – *Job file progressing in Prime – please do not action in BuildPRO / RestoPRO*

Please Note: Once the job file is auto created in Prime, a label will automatically be applied to the job file, **SYNCED TO ESTIMAGE**



You will also see the additional option to **SYNC TO ESTIMAGE** when uploading job notes, emails, documents etc



Adding a Client Account (Bill To) to each job.

1. Under the 'Details' section, 'Other Client Relationships'
 - Relationship = Client Account
 - Other Client Relationship = Bill To. For CBA Claims, select Hollard Insurance Partners Limited
 - Select 'Add'

The screenshot shows a software interface with a sidebar on the left containing navigation options: General, Overview, Details (highlighted), Reminders, Appointments, Forms, Finance, Documents, History, Share & Sync, and Authorised Works (Estimates). The main content area is divided into several sections: 'Additional Reference' with an input field; 'Client Contacts' with a dropdown set to 'CBA Insurance', a 'Relationship...' dropdown, a 'Client Contacts...' dropdown, and an 'Add' button; a message 'There are currently no linked client employees'; 'Client Office' with a dropdown set to 'CBA Insurance', a 'Relationship...' dropdown, a 'Client Office...' dropdown, and an 'Add' button; a message 'There is currently no client office linked'; and 'Other Client Relationships' which is highlighted with a green border. This section contains a 'Client Account' dropdown set to 'HOLLARD INSURAN', an 'Add' button, and a message 'There are currently no other client relationships'. At the bottom right are 'Cancel' and 'Update' buttons.

- The Client Account will then be displayed

The screenshot shows a blue card for 'HOLLARD INSURANCE PARTNERS LIMITED'. It includes a 'Client Account' label, a mobile phone icon with the text 'No number entered', an email icon with the address 'trainingdb@ajgrantgroup.com.au', and a 'View Contact' button at the bottom right.

Update the job status in Prime for Building Claims only

- Update the status to "Triage Required". This will be the trigger for the Assessing Admin team to action

The screenshot shows a dropdown menu for job status. The 'New Job' dropdown is open, showing options: 'Awaiting Assessment', 'Cancelled', 'Appointment Required', 'Progressing in BP', and 'Triage Required'. The 'Triage Required' option is highlighted with a green border.