



Support Centre Prime Ecosystem

Updated 16.01.23

Prime Support Centre

Restoration Coordinators Responsibility

Restoration jobs

Status = New Job

1. Courtesy call client and complete First Customer Contact

AJG0102 1 Test Ave, Taren Point, NSW, 2229 (SUTHERLAND SHIRE) ▾
Test Client | testresto

Summary

- Customer: Test, Test
- Preferred Number: 0403958152
- Email: page.mcdonald@ajgrantgroup.com.au
- Site: 1 Test Ave, Taren Point, NSW, 2229
- Client: Test Client
- Assigned: Page McDonald
- Case Manager: N/A
- Supervisor: N/A
- Estimator: N/A

Filter Menu...

General

- Overview
- Details

Comments

There are no items

Overview

- 0 days: Days At Current Status
- 0 days: Days Since Job Registered
- 0: Days Since Customer Contact
- 0 days: Days Since Client Contact

Milestones

- 0 / 3: Milestone Tracking
- First Customer Contact (highlighted in green)
- Inspection Scheduled
- Inspection Completed

2. Create the estimate to send to restoration contractor. At this stage, there is a 4% margin applied to each scope item. For agreed rates in restorations this will need to be removed or estimate adjusted – temporary measure at this stage. **This estimate is to be created for the agreed assessment report fee rate with the IC**

<https://ajgrantgroup.com.au/wp-content/uploads/2023/01/Estimates-Creating-Estimates.pdf>

AJG0102 1 Test Ave, Taren Point, NSW, 2229 (SUTHERLAND SHIRE)
Test Client | testresto

Overview

Details

Reminders

Appointments

Forms

Finance

Documents

History

Share & Sync

Authorised Works

- Estimates (highlighted in green)
- Quote Requests

Estimates

Summary Authorised Show All Hide All

Create New Estimate (highlighted in green)

if you wish to create a variation or copy of an existing estimate

Authorised

Authorised | \$0.00

Working Copies

There are no working copies

Restoration		Material				
Restorations - Attend site and complete assessment Report						
Notes...		Parent Item	Material	250.00	ea	1
Item Type...	GST Free		Labour	\$57.50	hr	0

3. Select 'Lock' and 'Lock and Authorise'

The screenshot shows the 'Estimates' interface with the 'Lock' button highlighted in green. Below it is a 'Please Select An Action' dialog box with three options: 'Lock', 'Lock & Authorise', and 'Lock & Authorise Items', with the last option highlighted in green. A 'Cancel' button is also visible at the bottom right of the dialog.

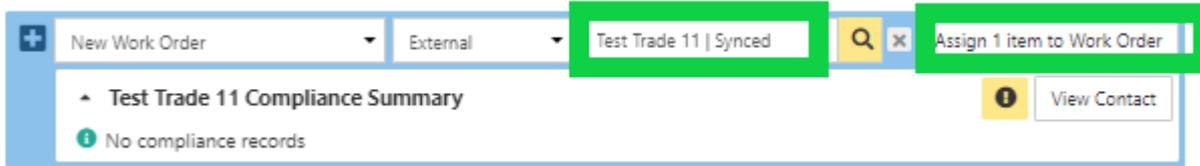
4. Send the work order to the trade
- Select 'Work Orders' under Authorised Works Section
 - 'Go to Create / Unallocated'

The screenshot shows the 'Work Orders | Authc' interface. The 'Work Orders' button in the left sidebar is highlighted in green. In the main content area, the 'Go to Create / Unallocated' button is also highlighted in green. The interface displays 'Work Orders Cost Total' and 'Work Orders Material' both at \$0.00, and a message indicating 'There are no work orders'.

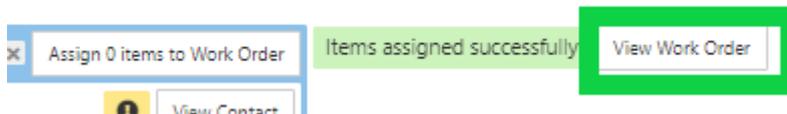
5. Adjust the allowance to the trades agreed rate and Click 'Select' next to Total on the Items line



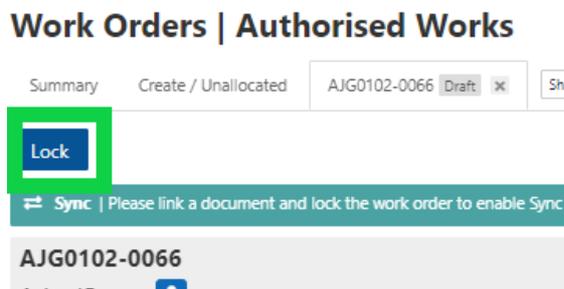
6. Select 'Assign To' and search for the subcontractor. Once subcontractor has been selected, click 'Assign X item/s to Work Order'



7. Click 'View Work Order'



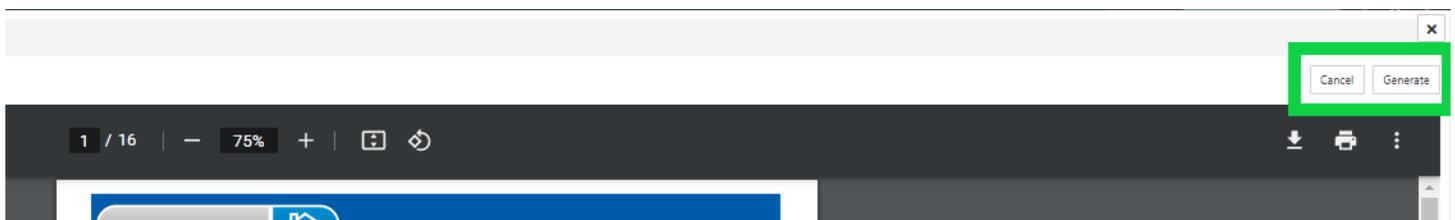
8. Lock the 'Work Order'



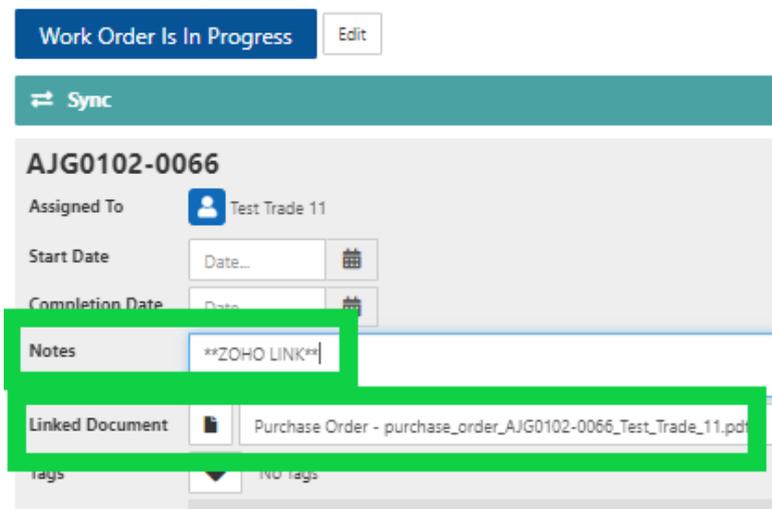
9. Select 'Preview PDF'



10. Check the purchase order and if no adjustments are required, select 'Generate'
If you need to adjust the purchase order, select 'Cancel'



- Once the purchase order has been generated, the purchase order document will automatically be added as a linked document within the work order
- For launch, insert the zoho restoration assessment report link as a 'Note'



- Select 'Allocate Work Order' on the Sync banner



- Select which costs and quantity to include, attach additional documents and notes and click 'Send'. The work order will now be on the trades portal to either accept or decline

Sync to Linked Contact ✕

Sync Related To
Job

Sync Action
Allocate Work Order

Work Orders
AJG0102-0066 (Test Trade 11)

Include Labour Cost
 Include Labour Quantity
 Include Material Cost
 Include Material Quantity

Documents
0 Selected Select All Select None

Group By Document Gallery Expand All Collapse All

Purchase Order 1 Document

Note
Note... Reset Send

- Update job Status to 'Awaiting Attendance'

Restoration Coordinators Responsibility

Restoration jobs

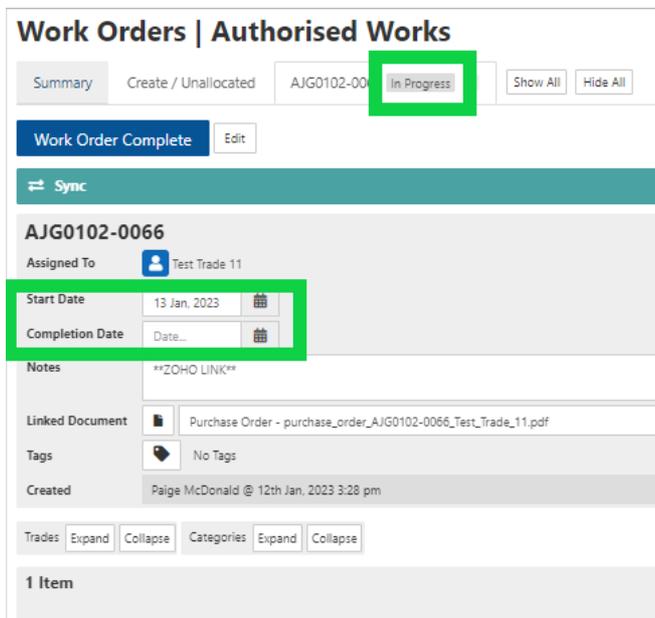
Status = Awaiting Attendance

Updates from the trade via the trade portal will be sent via the 'Share & Sync' Function and you will be required to 'Accept' the sync. The 'assigned' person on the job will also receive a notification.

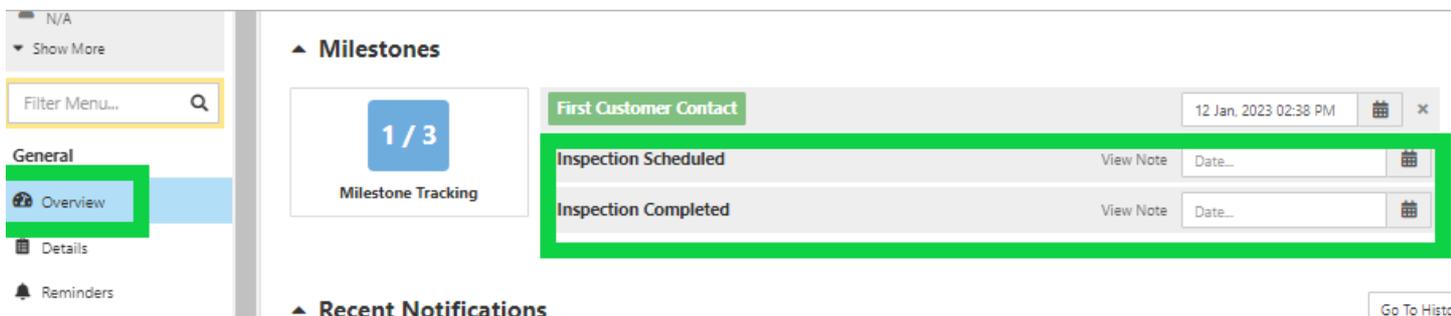


If the trade updates the start date, completion date or work order status in the trade portal, this will automatically be updated on the work order.

Job status is to be updated to 'Awaiting Report' based on the 'Start Date'.



These dates will then need to be updated within the job under 'Overview' section, Milestones



Restoration Coordinators Responsibility

Restoration jobs

Status = Awaiting Report

1. Trade will upload their assessment report and cost calculator which will be under 'documents' within the job.
2. Trade invoice will be under 'Finance' section, Account Payable Invoices tab for review.

Review trade invoice

- a. Select the Invoice

Finance

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

Accounts Payable Invoices

\$357.50 Work Orders Sell | \$275.00 Work Orders Cost | \$275.00 Invoiced | \$0.00 Not Invoiced | \$0.00 Paid | \$275.00 Not Paid | 100% % Completed

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

AJG0102-0066 | In Progress Test Trade 11

Work Order	Work Order Assigned	Work Order Type	Invoice Number	Account No.	Item Code	Amount	Invoiced Date	Due Date
AJG0102-0066	Test Trade 11	Authorised Works	testest			\$275.00	12th Jan 2023	12th Jan 2023

- b. Check Due Date is 30 days from Invoiced Date. If it isn't, update the due date

Accounts Payable Invoice

Work Order *
AJG0102-0066 (Test Trade 11) | Authorised Works

Work Order Assigned To
Test Trade 11 | Synced

Work Order Cost
\$275.00

Invoice Number *
testest

Account No.
Account No...

Item Code

Amount *
\$275.00

Full Amount
 Includes Tax

Invoiced Date *
12 Jan, 2023

Due Date *
12 Feb, 2023

- c. 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

A screenshot of a web form for approving a trade invoice. The form includes several fields: 'Approval' (a dropdown menu with 'Approved' selected), 'Approved By' (a text field containing 'Paige McDonald'), 'Approved At' (a date field containing '12th Jan 2023'), 'Approval Note' (a text area with 'Approval Note...'), and 'Status *' (a dropdown menu with 'Approved' selected). Green boxes highlight the 'Approval' and 'Status *' dropdown menus.

If you are declining the invoice:

Approval = Not Approved

Approval Note = Reason for denying the invoice

Status = cancelled

A screenshot of a web form for declining a trade invoice. The form includes several fields: 'Approval' (a dropdown menu with 'Not Approved' selected), 'Approval Note' (a text area), and 'Status *' (a dropdown menu with 'Cancelled' selected). Green boxes highlight the 'Approval', 'Approval Note', and 'Status *' fields.

- 3. Job status to be updated to 'Authorise Detail'

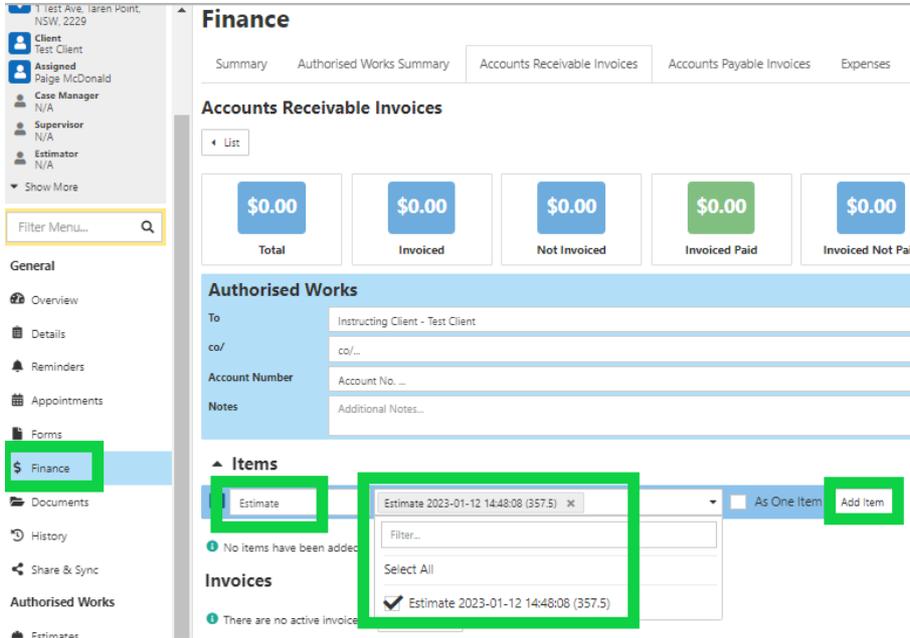
Restoration Coordinators Responsibility

Restoration jobs

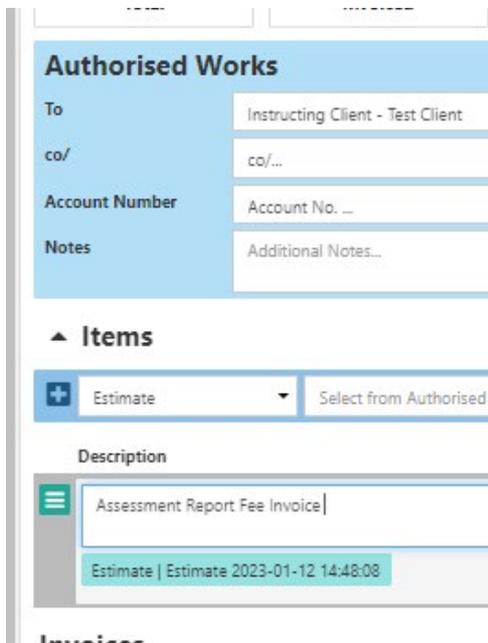
Status = Authorise Detail

Creating a report fee Invoice

1. Under the 'Finance' section within the job, select 'Accounts Receivable Invoices' tab
2. Select 'Estimate' as your item and select the estimate via the drop down list



3. Update description to 'Assessment Report Fee' and check the invoice amount is as our agreed report fee rate



4. Select 'Create PDF'

- Select 'Template', Division = Restorations, Type = Invoice, Select 'Show All' and select 'Restoration Tax Invoice Template'

Forms

Forms

◀ List Go Back To Accounts Receivable

Title Title...

Notes Additional Notes...

Linked Document No document linked

Save & Preview PDF Generate Generate & View Actions

Autosave enabled

Template *

Template...

Restoration

Invoice

Search... Show All Exact Match

Restoration Tax Invoice Template

Invoice Number	Invoice Date	Due Date	Payment %	Invoice Amount	Total	Status
INV-181	12th Jan 2023	26th Jan 2023	100.0000 %	3,302.0200	3,302.0200	Pending

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

Invoices

Invoice Number	Invoice Date	Due Date	Payment %	Invoice Amount	Total	Status
INV-181	12th Jan 2023	26th Jan 2023	100.0000 %	3,302.0200	3,302.0200	Pending

1 Invoice

3,302.0200

- Copy of the invoice will be under 'Documents' tab
- Locate the invoice and upload to Estimage

Creating an estimate as per the cost calculator

- Within the 'Estimates' section, select 'Create New Estimate'. The estimate is to be created with the IC costs. If the subcontractor allowance needs to be adjusted, this will be done when you allocate the work order to the subcontractor. At this stage, there is a 4% margin applied to each scope item. For agreed rates in restorations this will need to be removed or estimate adjusted – temporary measure at this stage.

AJG0102 1 Test Ave, Taren Point, NSW

Test Client | testresto

Finance

Documents

History

Share & Sync

Authorised Works

Estimates

Quote Requests

Estimates

Summary Authorised

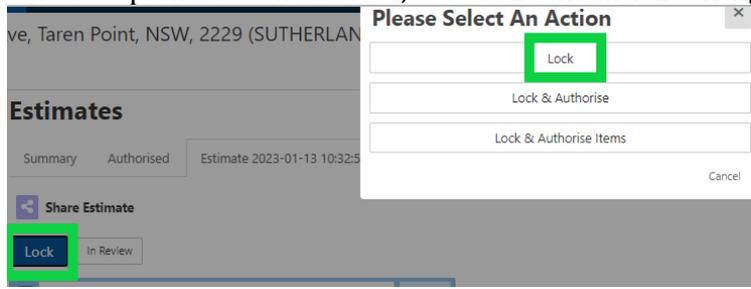
Create New Estimate

If you wish to create a variat

Authorised

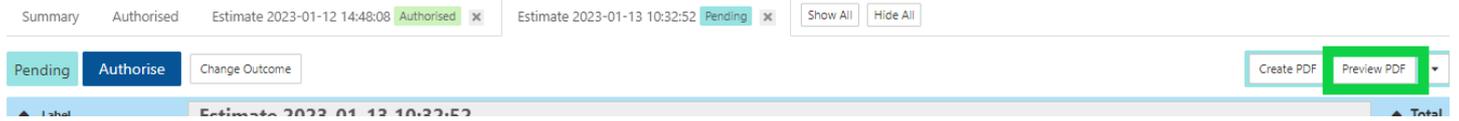
Authorised | \$357.50

2. Once scope has been created, select 'Lock' and 'Lock' again

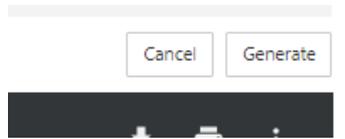


3. Select 'Preview PDF'

Estimates



4. Review the scope of works and select either 'Generate' or 'Cancel'



5. Once the scope of works has been generated, a PDF copy will be saved un 'Documents'

Restoration Coordinators Responsibility

Restoration jobs

Status = Awaiting Submission

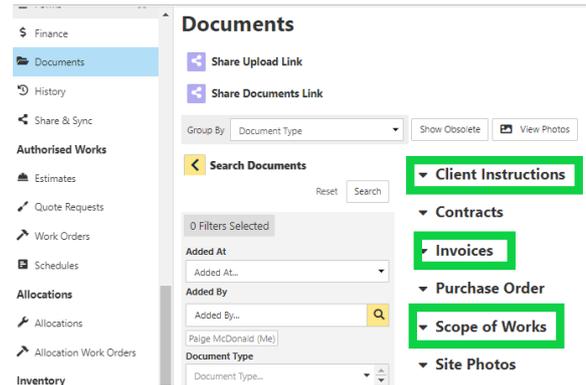
Preparing documents to send to the Insurance Company

Select the 'Documents' tab within the job

Assessment Report submitted from the subcontractor via the trade portal will be found under 'Client Instructions'

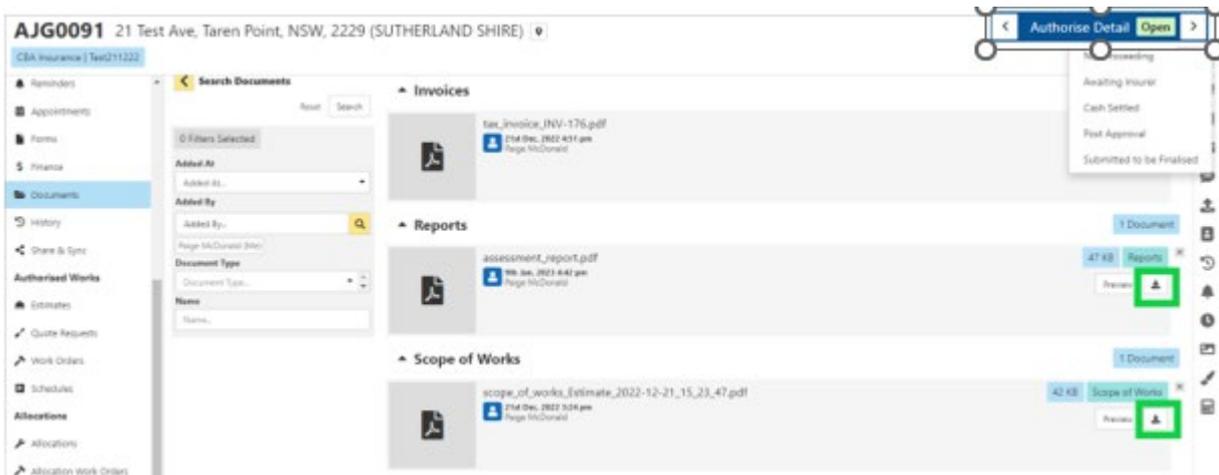
If a scope of works has been created and 'locked', it will be displayed under 'Scope of Works'.

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



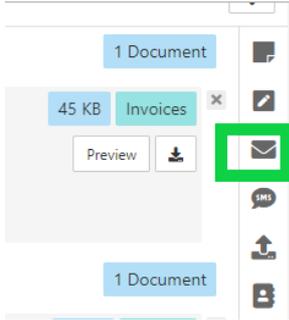
If you are uploading the documents to a portal

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

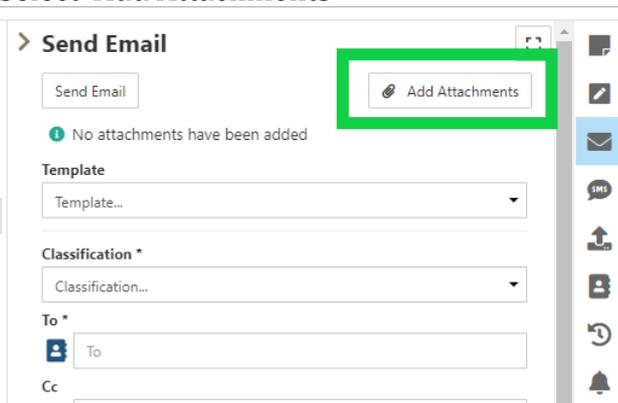


If you are emailing the documents

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

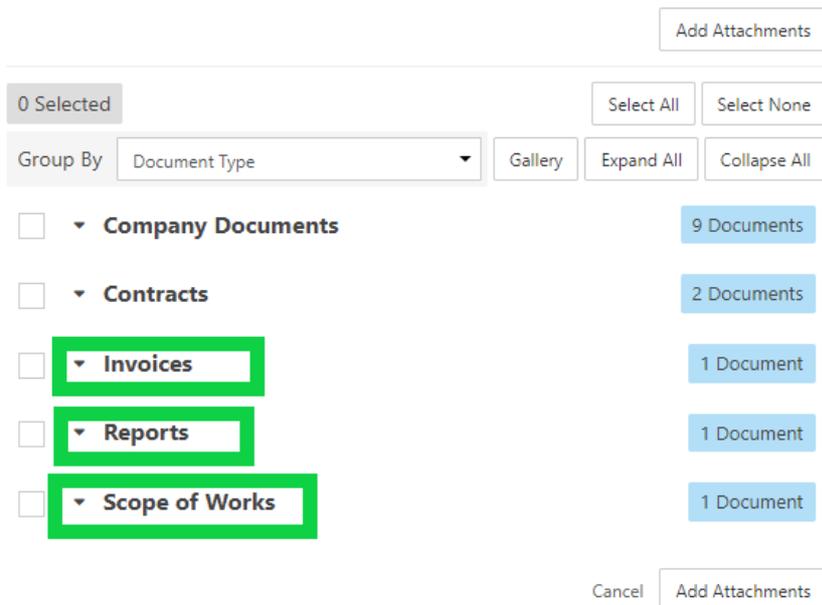


2. Select 'Add Attachments'

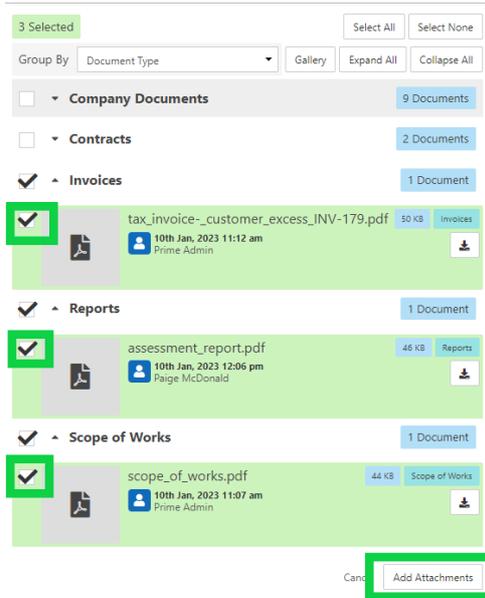


3. Click on the heading/s of the documents required to be sent

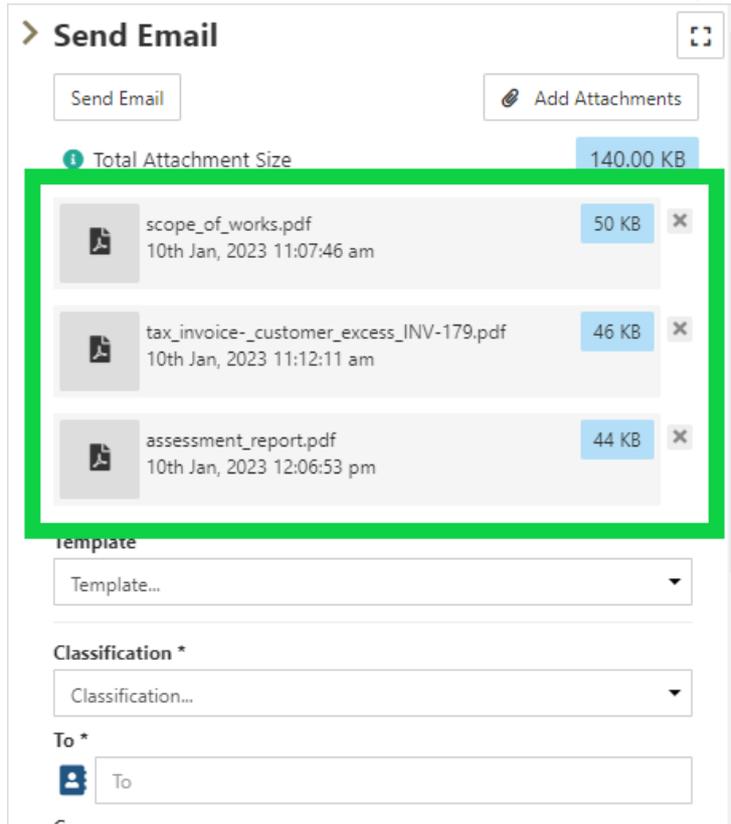
Add Attachments To Email



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



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



Restoration Coordinators Responsibility

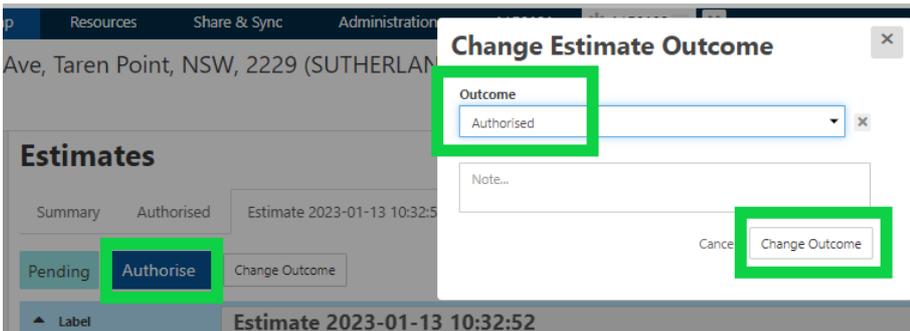
Restoration jobs

Status = Work in Progress

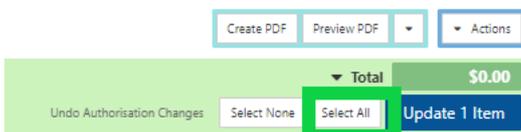
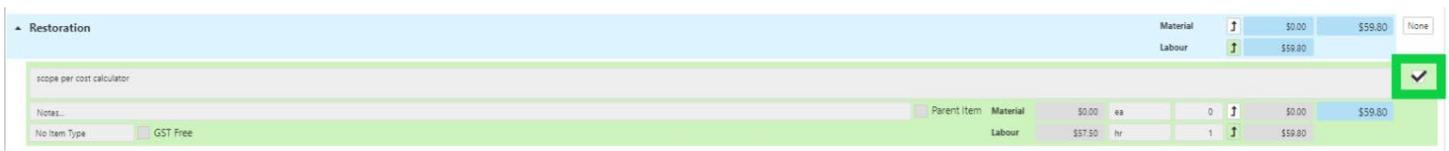
Authority received by IC

Accepting the estimate

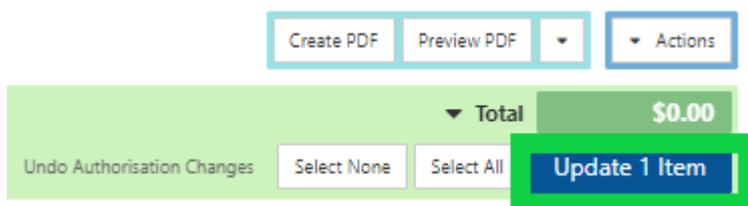
1. Approve the estimate in the 'Estimates' section, select the approved estimate and select 'Authorise' and 'Change Outcome'



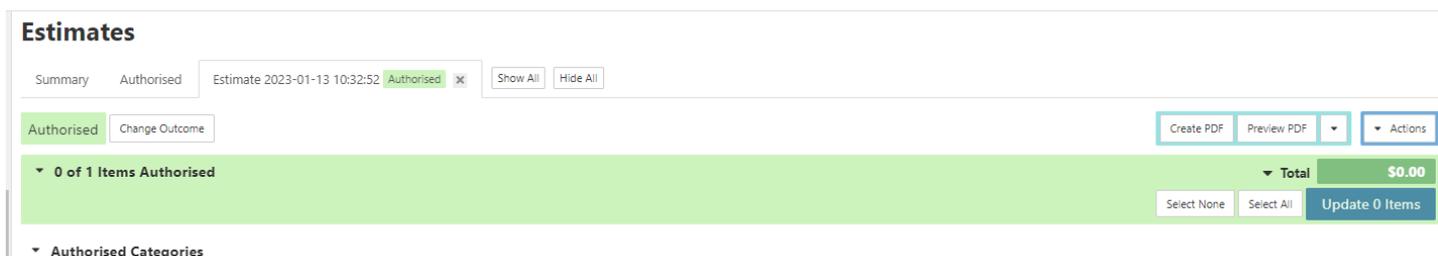
2. Select the scope line/s that have been approved. You can select individual scope item by ticking the scope or you can click 'Select All' top right hand corner



3. Click 'Update X Item/s'



4. Select 'Create PDF'



5. Select 'Generate'

Forms

Forms External Forms Site Forms

Forms

List Go Back To Estimate

Title **Scope of Works**

Notes Additional Notes...

Linked Document No document linked

Save & Preview PDF **Generate** Generate & View Actions

Autosave enabled Last saved 13th Jan, 2023 12:46:59 pm

To send the Work Order to the subcontractor

1. Click on the 'Work Orders' section under Authorised Works and select 'Go to Create / Unallocated'

Work Orders | Author

Summary Create / Unallocated Sh

\$275.00 \$275.00

Work Orders Cost Total Work Orders Material To

To create a new work order or add to an exist

Go to Create / Unallocated

Work Orders

Active (1)

AJG0102-0066 | \$275.00 | Test Tra
Created by Paige McDonald @ 12th Jan

Cancelled (0)

Overview Details Reminders Appointments Forms Finance Documents History Share & Sync Authorised Works Estimates Quote Requests **Work Orders** Schedules

2. Next to each scope line, you will have the option to select just the material, just the labour or both

Work Orders | Authorised Works

Summary Create / Unallocated Show All Hide All

Create a new work order or add items to an existing work order

New Work Order External Assign To... Assign 0 items to Work Order

Trades Expand Collapse Categories Expand Collapse View Options

Items	Material	Labour	Total
Cabinetry	Select	Select	Select
Kitchen	Select	Select	Select
Remove and replace (ladder frame modular) kickboards to match the existing design and quality as close as possible approximately [Lm]	\$0.00 Select	\$368.42 Select	\$368.42 Select
Remove and replace (material) (Island benchtop Breakfast Bar) to match the existing design and profile as close as possible, inclusive of mitres and cut outs approximately [mm x mm x Lm]	\$0.00 Select	\$73.68 Select	\$73.68 Select
Remove and replace (material) benchtop to match the existing design and profile as close as possible, inclusive of mitres and cut outs - approximately [mm x mm x Lm]	\$0.00 Select	\$368.42 Select	\$368.42 Select

If you are sending the entire work order to one subcontractor, click 'Select' next to 'Total' on the 'Items' line

Work Orders | Authorised Works

Summary Create / Unallocated Show All Hide All

Create a new work order or add items to an existing work order

New Work Order External Assign To... Assign 0 items to Work Order

Trades Expand Collapse Categories Expand Collapse View Options

Items	Material	Labour	Total	Select
Cabinetry				Select
Kitchen				Select
Remove and replace (ladder frame modular) kickboards to match the existing design and quality as close as possible approximately [Lm]	\$0.00	\$368.42	\$368.42	Select
Remove and replace (material) (Island benchtop Breakfast Bar) to match the existing design and profile as close as possible, inclusive of mitres and cut outs approximately [mm x mm x Lm]	\$0.00	\$73.68	\$73.68	Select

3. Next to New Work Order, select 'External'

4. Click on 'Assign To..' You will then have the option to filter to a trade type and/or region.

- If you wish to search for a specific subcontractor, you can type the company name in the search field or you can select 'Show All' and all Subcontractors matching the filter options will be displayed.

Work Orders | Authorised Works

Summary Create / Unallocated Show All Hide All

Create a new work order or add items to an existing work order

New Work Order External Assign To... Assign 8 items to Work Order

Cabinetry x

Supplier Tag...

SUTHERLAND SHIRE x

Search... Show All Exact Match

- To remove the filtering, click the cross next to the filtered section and you will be able to search all Subcontractors

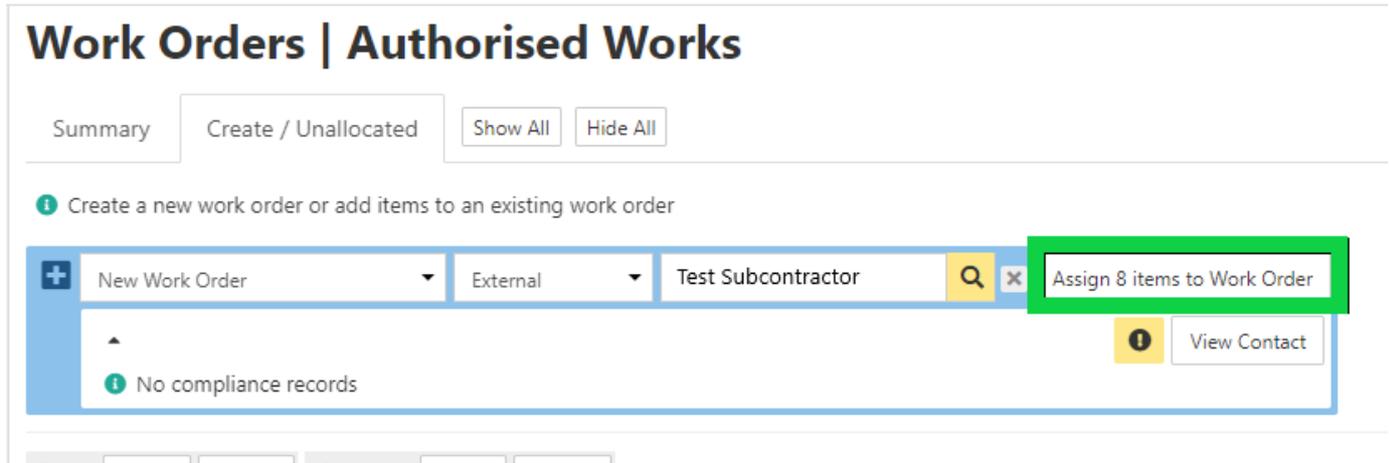
Assign To... Search... Show All Exact Match

Cabinetry x

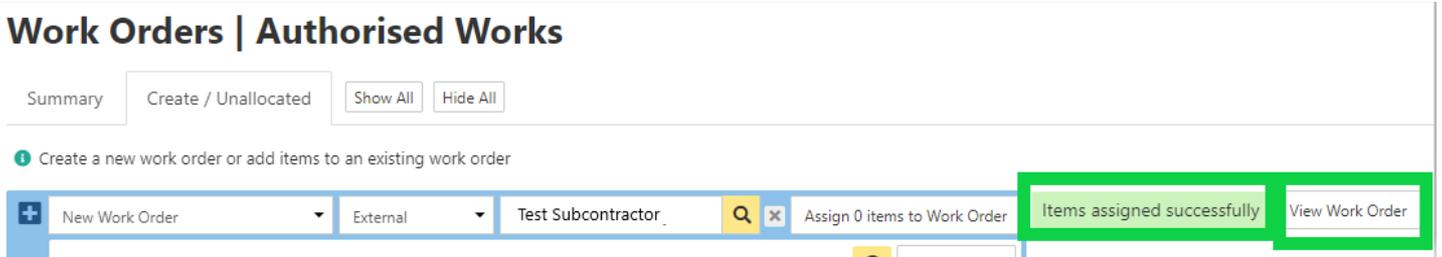
Supplier Tag...

SUTHERLAND SHIRE x

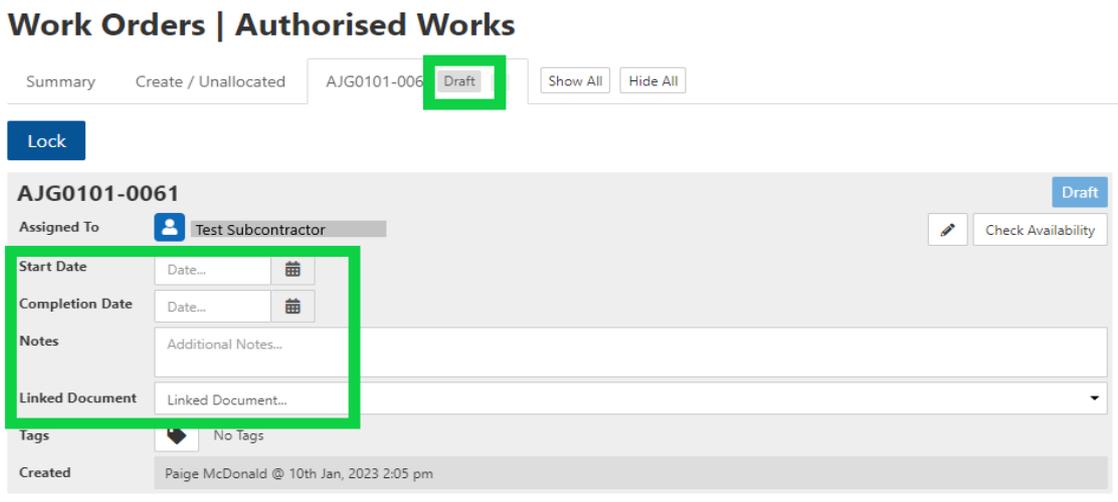
- Once you have selected the subcontractor, select 'Assign X items to Work Order'



- A notification will appear advising 'Items assigned successfully' and you will have the option to view the Work Order



- Select 'View Work Order'. This will open the Work Order that will be in a 'Draft' Status. You will have the option to enter Start and Completion Dates (the dates are adjustable and can be updated), additional notes and link a document/s



8. To check the trade availability, select 'Check Availability'.

AJG0101-0061 Draft

Assigned To

Start Date

Completion Date

Notes

Linked Document

Check Availability

A list of subcontractors will be displayed with the current number of open work orders. The subcontractor list will be automatically filtered to the trade type/s within the work order and repair dates entered.

9. On the right-hand side, you will have Sell amount, Cost amount and the Profit Margin based on the approved estimate

Work Orders | Authorised Works

Summary Create / Unallocated AJG0101-0061 Draft

AJG0101-0061 Draft

Assigned To Niko Constructions Pty Ltd

Start Date

Completion Date

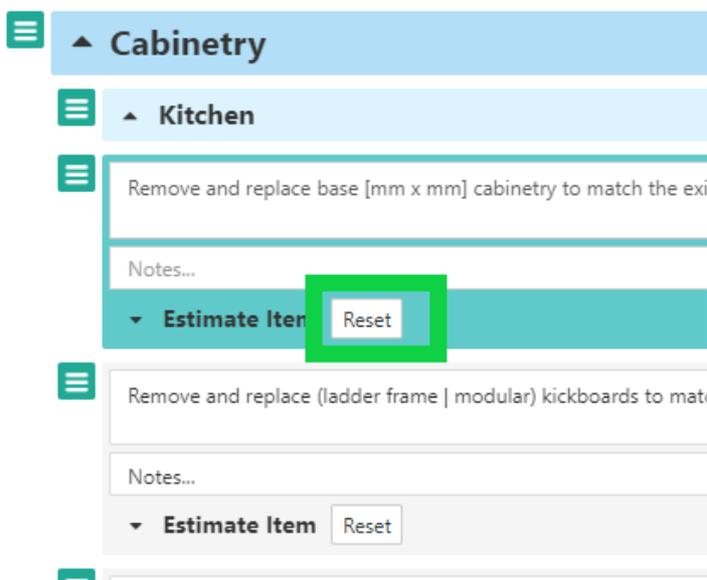
	Sell	Cost	Profit Margin
Total	\$2,431.57	\$1,870.44	23.08%
GST	\$221.05	\$170.04	Inc GST
Subtotal	\$2,210.52	\$1,700.40	

10. You will need to adjust the subcontractor allowance by adjusting the material allowance, hrly rate or hours to match the allowance as per the cost calculator. To do this, scroll down to the scope line item/s you wish to adjust, click in the relevant cell and change as required.

Cabinetry									
Kitchen									
Remove and replace base [mm x mm] cabinetry to match the existing design and quality as close as possible - approximately [LM]									
Notes...	Material	\$0.00	ea	1	\$0.00	\$0.00	\$212.55		
Estimate Item <input type="button" value="Reset"/>	Labour	\$70.85	hr	3	\$460.53	\$212.55			
Remove and replace (ladder frame modular) kickboards to match the existing design and quality as close as possible approximately [Lm]									
Notes...	Material	\$0.00	ea	1	\$0.00	\$0.00	\$212.55		
Estimate Item <input type="button" value="Reset"/>	Labour	\$70.85	hr	3	\$460.53	\$212.55			
Remove and replace overhead cabinetry [mm x mm], to match the existing design and quality as close as possible - approximately [LM]									
Notes...	Material	\$0.00	ea	1	\$0.00	\$0.00	\$141.70		
Estimate Item <input type="button" value="Reset"/>	Labour	\$70.85	hr	2	\$460.53	\$141.70			

NOTE: You will also have the option to increase the subcontractor allowance, however this will not be updating the estimate and will result in a lower Profit Margin

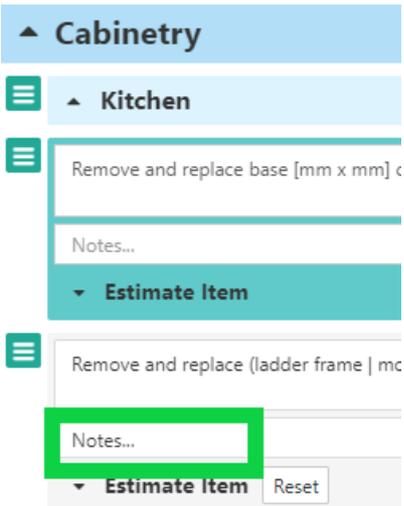
11. If you need to reset the scope line allowance to go back to the original allowance, click on the scope line and select 'Reset'



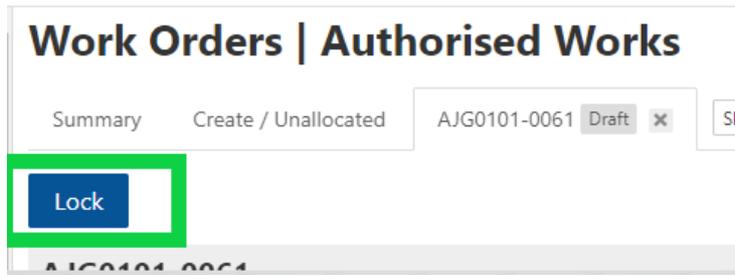
12. Once you have adjusted the allowance, the Cost and Profit Margin will be updated to reflect the changes made

	Sell	Cost	Profit Margin
Total	\$2,431.57	\$1,636.63	32.69%
GST	\$221.05	\$148.79	<input checked="" type="checkbox"/> Inc GST
Subtotal	\$2,210.52	\$1,487.85	

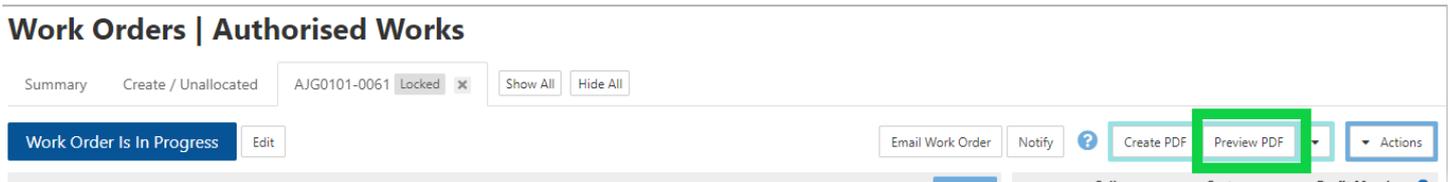
13. If you would like to send a note relating to a specific scope line, type the note under the 'Notes' section beneath the relevant scope line



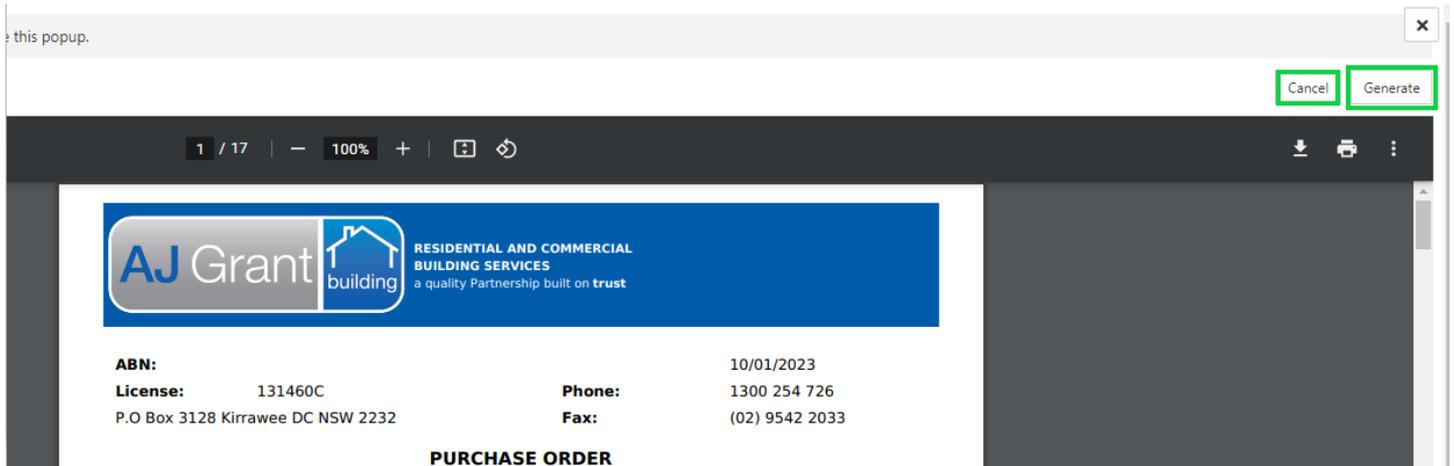
14. Once you are ready to send to send the work order, select 'Lock' at the top of the page



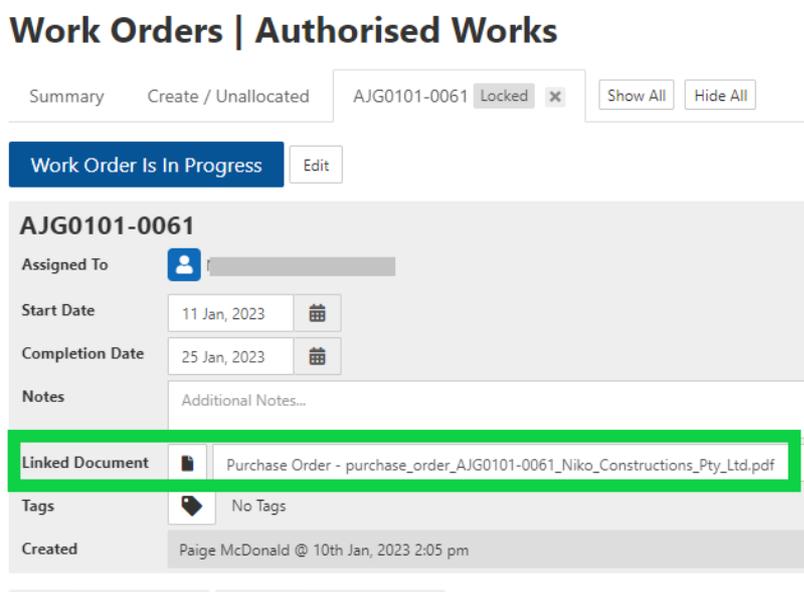
15. Select 'Preview PDF'



16. Check the purchase order and if no adjustments are required, select 'Generate'
If you need to adjust the purchase order, select 'Cancel'



17. Once the purchase order has been generated, the purchase order document will automatically be added as a linked document within the work order



18. Select 'Allocate Work Order' on the Sync banner

Work Orders | Authorised Works

Summary Create / Unallocated AJG0101-0061 Locked x Show All Hide All

Work Order Is In Progress Edit Email Work Order Notify ? Create PDF Preview PDF Actions

Sync Allocate Work Order

AJG0101-0061 Locked Sell Cost Profit Margin

19. Select which costs and quantity to include, attach additional documents and notes and click 'Send'.
The work order will now be on the trades portal to either accept or decline

Sync to Linked Contact

Sync Related To: Job

Sync Action: Allocate Work Order

Work Orders: AJG0101-0061 (Niko Constructions Pty Ltd)

Include Labour Cost
 Include Labour Quantity
 Include Material Cost
 Include Material Quantity

Documents: 0 Selected Select All Select None

Group By: Doc Gallery Expand All Collapse All

- Contracts 2 Documents
- Invoices 1 Document
- Purchase Order 1 Document

Note: Note... Reset Send

Restoration Coordinators Responsibility

Restoration jobs

Status = Work in Progress

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, follow the same process as reviewing the report fee invoice in the 'Finance' section, 'Accounts Payable Invoice'.

Job Status - Confirm for Completion

Confirm for Completion Team Responsibility

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

The screenshot shows the 'Work Orders' tab for job AJG0085. At the top, there are four summary cards: 'Work Orders Cost Total' (\$580.80), 'Work Orders Material Total' (\$580.80), 'Work Orders Labour Total' (\$0.00), and 'Work Orders Not Invoiced' (\$290.40). Below these is a section for 'Work Orders' with a sub-section for 'Active (2)'. Two work orders are listed, both with a 'Completed' status (highlighted with a green box) and a '16.67%' profit margin. The 'Cancelled (0)' section is empty.

2. Check the overall job Forecast Profit Summary, under the 'Overview' section within the job.

The screenshot shows the 'Overview' section for job AJG0069. The 'Forecast Profit Summary' is highlighted. It includes an 'Overall' section with 'Forecast Profit' (\$288.20) and 'Forecast Profit Margin' (16.67%). Below this are three sections: 'Authorised Works' (Forecast Profit: \$288.20, Forecast Profit Margin: 16.67%, Authorised Works: \$1,729.20, Work Orders: \$1,441.00), and 'Allocations' (Forecast Profit: \$0.00, Forecast Profit Margin: 0%, Allocations: \$0.00, Work Orders: \$0.00). The 'Overview' tab in the left sidebar is circled in blue.

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 Pro

Test Client | Test123456 | 1 Linked Job

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	\$605.00	✓			✓
Plastering						
Remove and replace ceiling and cornice, set/sand in preparation for paint - 5m2	\$1,115.40	\$929.50	✓			✓
Bedroom 2						
Painting						
Prepare and paint ceiling and cornice to best match existing - 22m2	\$871.20	\$605.00	✓			
Plastering						
Remove and replace ceiling and cornice, set/sand in preparation for paint - 5m2	\$1,115.40	\$929.50	✓			

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) 1 Hour Behind

RACV Insurance Services Pty Ltd 12 | test123

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] ca/... Account No. ... **Create**

Assessment Fee | RACV Insurance Services Pty Ltd 12 \$220.00 paid of \$220.00 INV-155
Created by Paige McDonald @ 7th Dec, 2022 1:52 pm

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

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

Summary Authorised Works Summary Accounts Receivable Invoices Accounts Payable Invoices Expenses

Accounts Receivable Invoices

◀ List

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

Authorised Works

To: Instructing Client - RACV Insurance Services Pty Ltd 12

co/: co/...

Account Number: Account No. ...

Notes: Additional Notes...

Items

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

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

Authorised Works

To: Instructing Client - RACV Insurance Services Pty Ltd 12

co/: co/...

Account Number: Account No. ...

Notes: Additional Notes...

Items Deduct Excess \$348.48

+ Estimate Select from Authorised Work... As One Item Add Item

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

12. Select 'Create PDF'

- Select 'Template', Division = Restorations, Type = Invoice, Select 'Show All' and select 'Restoration Tax Invoice Template'

Forms

Title

Notes

Linked Document No document linked

Autosave enabled

Template *

- Select 'Save and Preview PDF'
- Invoice will then be displayed
- Close window and click 'Generate'
- Invoice status will move from 'Draft' to 'Pending'

Authorised Works

To Instructing Client - RACV Insurance Services Pty Ltd 12

co/ 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	cancel 21st Dec 2022 9:39:46 am

1 Invoice 348.4800

- Copy of the invoice will be under 'Documents' tab
- Locate the invoice and upload to Estimage
- Job status to be updated 'Invoiced' status