



Support Centre Prime Ecosystem

Updated 03.02.2023

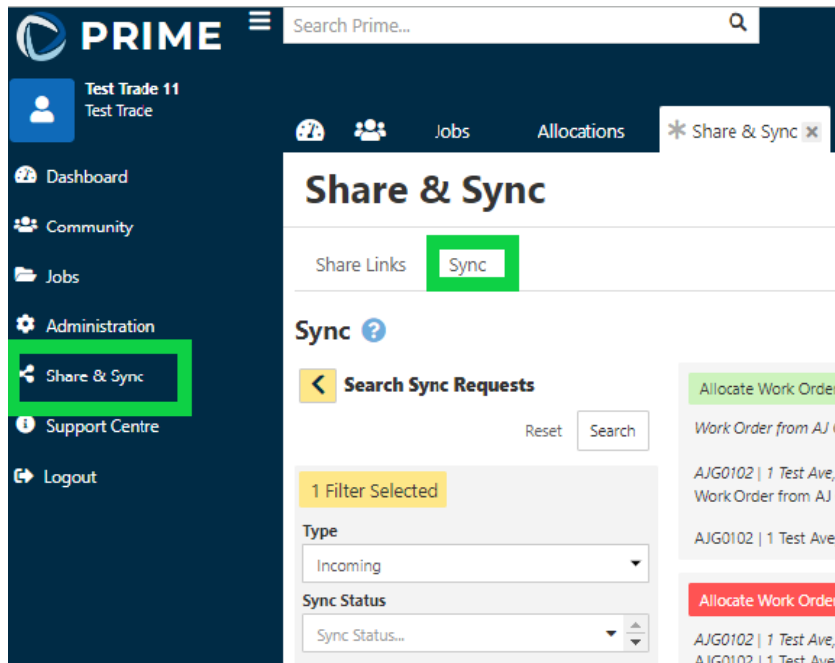
[Prime Support Centre](#)

Prime Sync – Sync Queues

Work orders, updates and invoices are all sent via a sync request between AJG Australia and your trade portal. The sync requests go to a 'Sync Queue' and all sync requests need to be 'Accepted' before you can view the request.

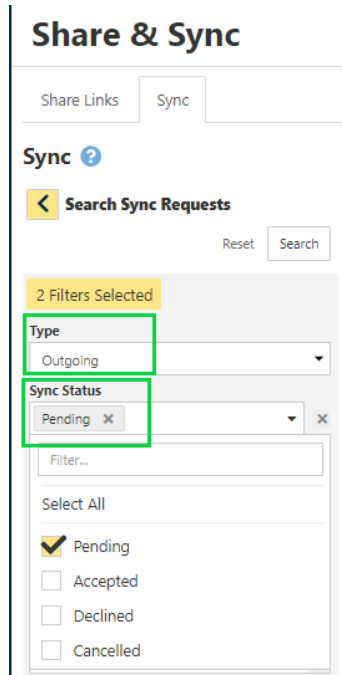
Company Sync Queue

Your Company Sync Queue can be found under the 'Sync' tab within the 'Share & Sync' section of Prime. Within this section, you can search all syncs across all jobs.



You can search for 'incoming' (syncs received from AJG Australia) or 'Outgoing' (syncs from your company back to AJG Australia).

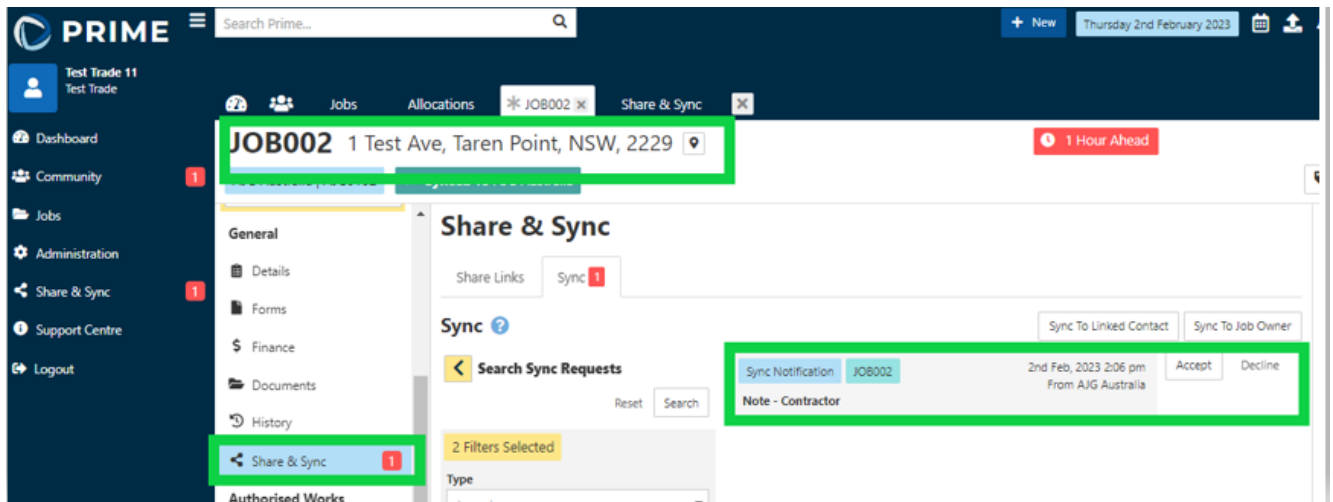
You also have the option to search via the sync status 'Pending', 'Accepted', 'Declined' or cancelled.



Job Specific Sync Queue

Each job also has a sync queue specific for that job file. All sync requests can be accepted/declined from both the Company Sync Queue and the job specific Sync Queue.

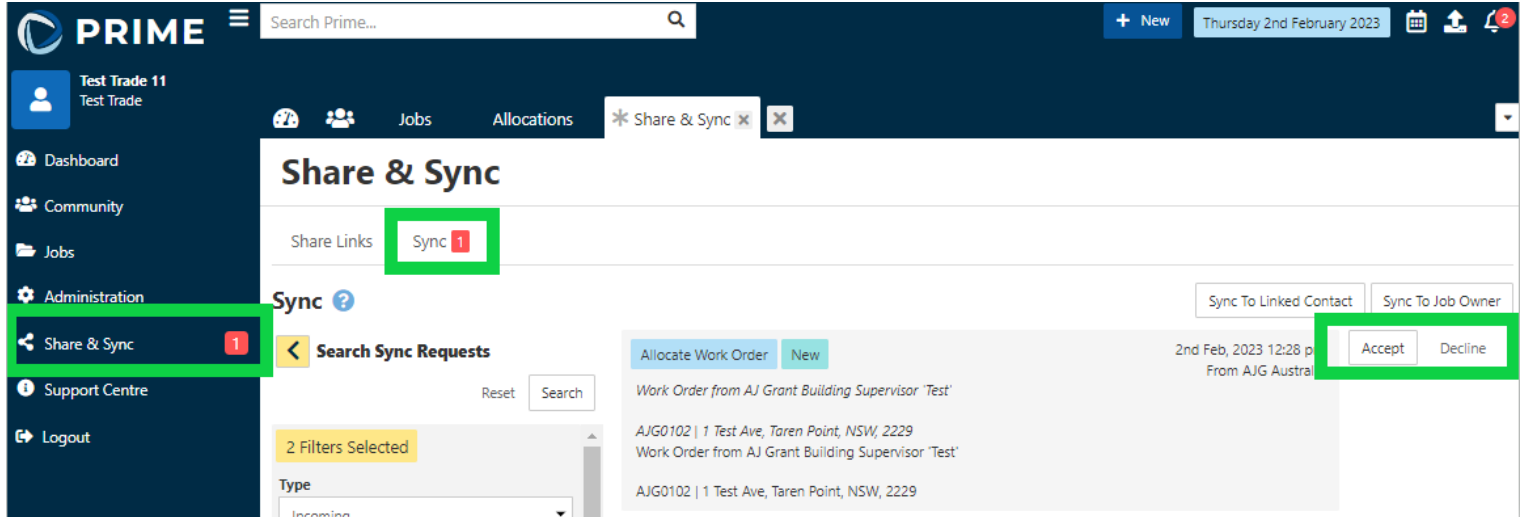
Example: You have received a note on a work order from AJG Australia. This can be found within the specific job under 'Share & Sync'



Trade Accepting a Work Order

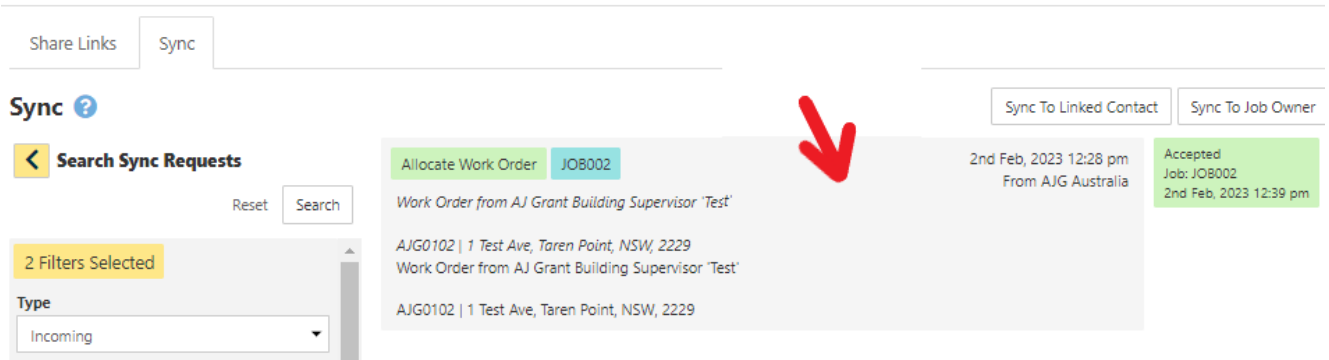
1. Email received to the trades nominated email address advising they have been sent a Work Order from AJG Australia (trades are unable to access the Work Order from the email)
2. The work order request will now be in the Sync queue with two options to select – Accept / Decline. No job data will show in the trades portal until the request has been accepted.

Within Prime, select 'Share & Sync' section, 'Sync' tab and then 'Accept' the Work Order.

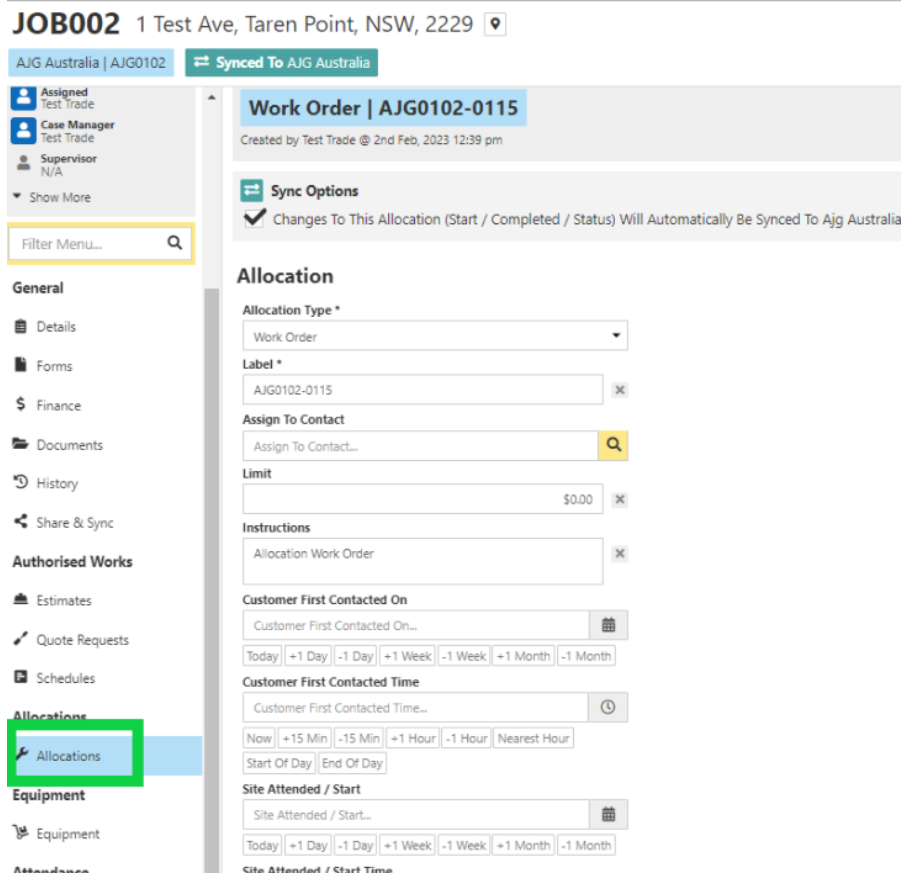


3. Once you have accepted the Work Order a job will be created within your portal and you can click within the work order to navigate to job.

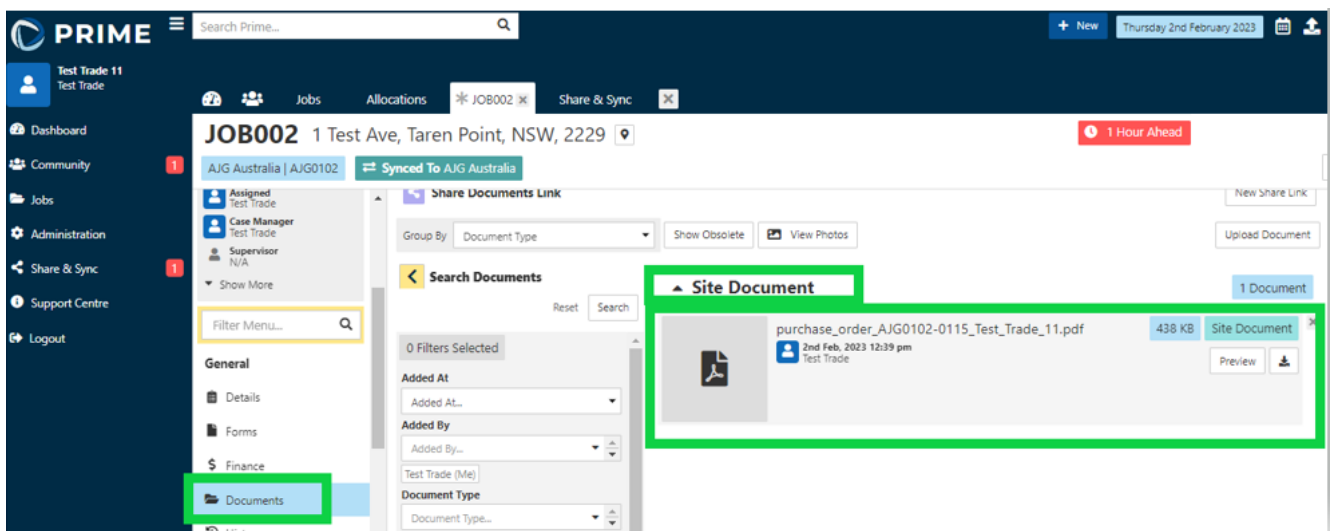
Share & Sync



4. All Work Orders are created as an 'Allocation' within the job



5. A copy of the PDF Work Order will be saved under the 'Documents' section within the job and will have the Estimate for the Work Order. Any other documentation/photos sent with the sync request will also be saved in Documents.



Updating the allocation status

Throughout the repairs, the allocation status needs to be updated.

Once the status is updated, AJG Australia will automatically receive a sync request advising of the status change (so long as sync options is ticked)

1. To update the status, within the allocation select 'Change Status' and select the new status from the drop-down selection list

The screenshot displays the software interface for 'JOB002' at '1 Test Ave, Taren Point, NSW, 2229'. A red notification bubble indicates '1 Hour Ahead'. The interface includes a sidebar with user roles (Assigned, Case Manager, Supervisor) and a main content area titled 'Allocations'. A summary bar shows 'Work Order | AJG0102-0115' with a 'Change Status' button highlighted in a green box. Below this, a 'Sync Options' section has a checked box for 'Changes To This Allocation (Start / Completed / Status) Will Automatically Be Synced To Ajj Australia'. The 'Allocation' section is partially visible at the bottom.

The 'Change Allocation Status' dialog box is shown, featuring a dropdown menu for 'Allocation Status *'. The dropdown list includes the following options: Allocation Status..., New, Locked, Allocation In Progress, Allocation Completed, Cancelled, Allocated, Ready To Invoice, Invoiced, and Paid. At the bottom of the dialog, there are 'Cancel' and 'Change Status' buttons.

Updating the Start and Completed Date

Start and completed dates also automatically sync to AJG Australia, so long as the Sync Options is ticked.

1. Enter the 'Site Attended / Start' date and time and select 'Update'.
Once repairs have been completed, enter the 'Completed' date and time.

The screenshot shows a form with several sections, each with a green box highlighting the title:

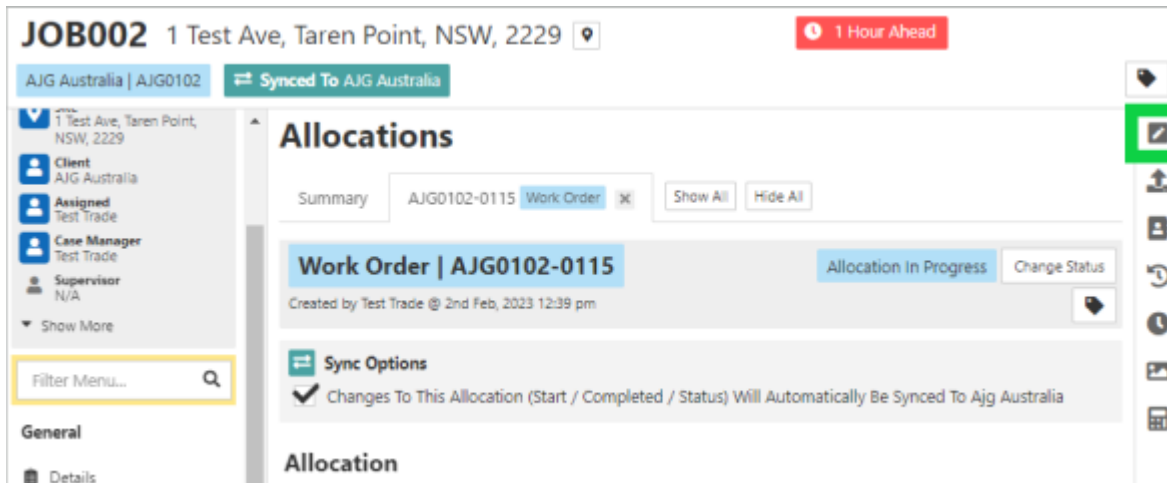
- Site Attended / Start**: A date input field containing "2 Feb, 2023". Below it are buttons for "Today", "+1 Day", "-1 Day", "+1 Week", "-1 Week", "+1 Month", and "-1 Month".
- Site Attended / Start Time**: A time input field containing "03:28 PM". Below it are buttons for "Now", "+15 Min", "-15 Min", "+1 Hour", "-1 Hour", and "Nearest Hour".
- Completed**: A date input field containing "3 Feb, 2023". Below it are buttons for "Today", "+1 Day", "-1 Day", "+1 Week", "-1 Week", "+1 Month", and "-1 Month".
- Completed Time**: A time input field containing "11:43 AM". Below it are buttons for "Now", "+15 Min", "-15 Min", "+1 Hour", "-1 Hour", and "Nearest Hour".
- Works Completed**: A text input field containing "Works Completed...".
- Update**: A button at the bottom right of the form, highlighted with a green box.

Declining a Work Order

If you haven't completed any repairs and wish to decline the work order, you need to send a 'Note' to AJG Australia advising you are declining the work order and the reason why.

Sending a note

1. Open the allocation and select the pencil under the right-hand side panel



2. Ensure 'Sync this note AJG Australia' is ticked
3. Next to 'Classification' select Client
4. Enter the reason for declining the work order
5. Select 'Add Note to History'

Add Note To History

Sync Options
 Sync This Note To Ajj Australia

Add Note To History

Template
Template...

Classification *
Client

Note *
Unable to complete work order due to current workload.
Please allocate to another trade

Create Reminder For
Create Reminder For...
Test Trade (Me)

Reset Add Note To History

There are unsaved changes

As you are not proceeding with the allocation, you will also need to update the allocations status to 'Cancelled'.

If you only have 1 allocation for that specific job, you will also need to update the job status to 'Cancelled'.

The screenshot displays a software interface for job management. At the top left, the job ID 'JOB002' is shown next to the address '1 Test Ave, Taren Point, NSW, 2229'. A red notification bubble indicates '1 Hour Ahead'. To the right, there are buttons for 'New Allocation', 'Open', and a chevron icon. Below this, a sidebar lists roles: Client (AJG Australia), Assigned (Test Trade), Case Manager (Test Trade), and Supervisor (N/A). The main area is titled 'Allocations' and shows a summary for 'AJG0102-0115 Work Order'. A specific allocation is highlighted as 'Work Order | AJG0102-0115' with a status of 'Allocation In Progress'. A 'Change Status' button is visible next to it. Red text labels 'Job status' and 'Allocation status' with arrows point to the 'New Allocation' and 'Change Status' buttons respectively. A 'Sync Options' button is at the bottom.