



Support Centre Prime Ecosystem

Updated 16.1.23

Prime Support Centre

Job Status – Awaiting submission

Submission Team

Creating an Assessment Report Fee Invoice – Internal Assessor has completed the assessment

1. Under the 'Finance' section on the job, select the 'Accounts Receivable Invoices' tab

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

CBA Insurance | Test211222

Finance

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

Accounts Receivable Invoices

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

+ Type (Required)... To (Required)... co/... Account No. ... Create

There are no accounts receivables

Summary

- Customer: Paige Test
- Preferred Number: 0403958152
- Email: paige.mcdonald@ajgastralia.com.au
- Site: 21 Test Ave, Taren Point, NSW, 2229
- Client: CBA Insurance
- Assigned: Paige McDonald
- Case Manager: N/A
- Supervisor: N/A
- Estimator: N/A

Filter Menu...

General

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- Finance**
- Documents

- Type = Assessment Fee
- To = Bill To (For CBA claims, select Hollard Insurance Partners Limited)
- Select 'Create'

Finance

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

Accounts Receivable Invoices

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

There are no accounts receivables

- Under 'Items', select 'Predefined Items'
- Click on 'Select from Template' and type 'Assessment Report Fee'. A list of all assessment report fees will be displayed, select the correct amount for the IC you are creating the invoice for
- Select 'Add Item'

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

Accounts Receivable Invoices

◀ List

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

Assessment Fee

To: Client Account - HOLLARD INSURANCE PARTNERS LIMITED

co/: co/...

Account Number: Account No. ...

Notes: Additional Notes...

▲ Items

- Check the 'Due Date' has been prefilled to 14 days from the created date.
- Select 'Create PDF'

1	180.0000	18.0000	<input checked="" type="checkbox"/>	198.0000
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int	Total	Status	Document Details
10	198.0000	Draft	<input type="button" value="Create PDF"/> <input type="button" value="Create PDF"/>

10. Select 'Template', Division = Building, Type = Invoices, Select 'Show All' and select 'Tax Invoice'

Forms

Go Back To Accounts Receivable

Title: Title...

Notes: Additional Notes...

Linked Document: No document linked

Autosave enabled

Template *

Building

Invoices

Tax Invoice

Show All Exact Match

Save & Preview PDF Generate Generate & View Actions

Cancel Save

11. Select 'Generate'

Save & Preview PDF Generate Generate & View Actions

Cancel Save

12. Page will refresh and invoice Status will update to 'Pending'

13. To approve the invoice, click on 'Pending' and update the Invoice Status to 'Approved' and select 'Change Status'

Change Invoice Status

Invoice Status: Approved

Note:

Notify: Paige McDonald (Me)

Cancel Change Status

Awaiting Submission

Invoiced Paid \$0.00 Invoiced Not Paid \$198.00

Total \$198.00

Item Code	Rate	Unit	Qty	Subtotal	Tax	Total
Item Code...	180	Ea	x 1	180.0000	18.0000	198.0000

Invoice Date	Due Date	Payment %	Invoice Amount	Total Status	Document Details
21st Dec 2022	4th Jan 2023	100.0000 %	198.0000	Pending	21st Dec 2022 3:40:04 pm

198.0000

14. Invoice Status will now be 'Approved' and invoice will transfer to Exo.

Invoices

Invoice Number	Invoice Date	Due Date	Payment %	Invoice Amount	Total	Status	Document Details
INV-172	21st Dec 2022	4th Jan 2023	100.0000 %	198.0000	198.0000	Approved	cancel 21st Dec 2022 3:40:04 pm

1 Invoice 198.0000

If you have incorrectly created an invoice or need to make changes after you have changed the status to 'Approved', please cancel the invoice. This will trigger Prime to send a notification to accounts that the invoice has been cancelled and please recreate the invoice with the correct details.

15. Invoice PDF will now be saved under 'Documents'

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

CBA Insurance | Test211222

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Authorised Works

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Allocations

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- Allocation Work Orders

Inventory

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- Inventory
- Storage

Documents

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Group By: [Show Obsolete](#) [View Photos](#)

Invoices

- tax_invoice_INV-172.pdf
21st Dec, 2022 3:40 pm
Paige McDonald

Reports

- assessment_report.pdf
21st Dec, 2022 3:46 pm
Paige McDonald

Scope of Works

- scope_of_works_Estimate_2022-12-21_15_23_47.pdf
21st Dec, 2022 3:24 pm
Paige McDonald

Creating an Assessment Report Fee Invoice (internal assessor has completed assessment) with a Specialist Report Invoice. E.g Roof report, Leak detection

Creating the Specialist Report Invoice

1. Under the 'Finance' section on the job, select the 'Accounts Receivable Invoices' tab

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

CBA Insurance | Test211222

Finance

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

Accounts Receivable Invoices

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

+ Type (Required)... To (Required)... co/... Account No. ... Create

There are no accounts receivables

Filter Menu...

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- Documents

2. Type = Allocations
3. To = Bill To (For CBA claims, select Hollard Insurance Partners Limited)
4. Select 'Create'

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

CBA Insurance | Test211222

Finance

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

Accounts Receivable Invoices

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

Allocations Client Account - HOLLARD INSL co/... Account No. ... Create

Assessment Fee | HOLLARD INSURANCE PARTNERS LIMITED Draft \$0.00 paid

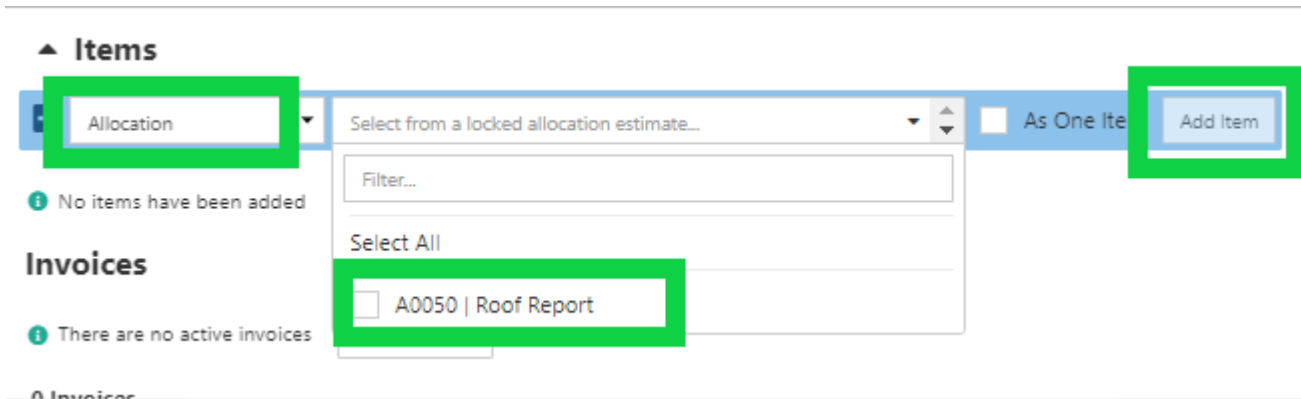
Created by Paige McDonald @ 21st Dec, 2022 3:32 pm

Filter Menu...

General

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- Appointments
- Forms
- Finance**
- Documents

- Under 'Items', 'Allocations' should already be selected
- Click on 'Select from locked allocation estimate and select the allocation you are creating the invoice for. If we are invoicing for multiple allocations, select all required allocations.
- Select 'Add Item'



- Check the 'Due Date' has been prefilled to 14 days from the created date.

Invoices

Invoice Number	Invoice Date	Due Date	Payment %	Invoice Amount	Total	Status	Document Details
INV-176	21 Dec. 2022	4 Jan. 2023	100.0000 %	396.0000	396.0000	Draft	Create PDF
Notes...	Today +1 Day -1 Day	Today +1 Day -1 Day					
	+1 Week -1 Week	+1 Week -1 Week					
	+1 Month -1 Month	+1 Month -1 Month					

1 Invoice 396.0000

Adding the Assessment Report Fee to the invoice (Internal Assessor attended)

- Under 'Items', select 'Predefined Item'
- Click on 'Select from Template' and type 'Assessment Report Fee'. A list of all assessment report fees will be displayed, select the correct amount for the IC you are creating the invoice for
- Select 'Add Item'

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

Accounts Receivable Invoices

List

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

Assessment Fee

To: Client Account - HOLLARD INSURANCE PARTNERS LIMITED

co/...: co/...

Account Number: Account No. ...

Notes: Additional Notes...

Items

Predefined Item Assessment Report Fee \$180 Add Item

12. Check the Assessment Report Fee has been added and the total invoice amount has updated

Items Deduct Excess **\$594.00**

Predefined Item Select from Template... Add Item

Description	Item Code	Rate	Unit	Qty	Subtotal	Tax	Total
Assessment Report Fee \$180		180	Ea	1	180.0000	18.0000	198.0000
Roof Report		360	Ea	1	360.0000	36.0000	396.0000

Invoices

Invoice Number	Invoice Date	Due Date	Payment %	Invoice Amount	Total	Status	Document Details
INV-176	21 Dec 2022	4 Jan 2023	100.0000 %	594.0000	594.0000	Draft	Create PDF

1 Invoice 594.0000

13. Select 'Create PDF'

14. Select 'Template', Division = Building, Type = Invoices, Select 'Show All' and select 'Tax Invoice'

Forms Go Back To Accounts Receivable

Title Title...
Notes Additional Notes...
Linked Document No document linked

Autosave enabled

Save & Preview PDF Generate Generate & View Actions

Cancel Save

Template*
Building
Invoices
Tax Invoice

Show All Exact Match

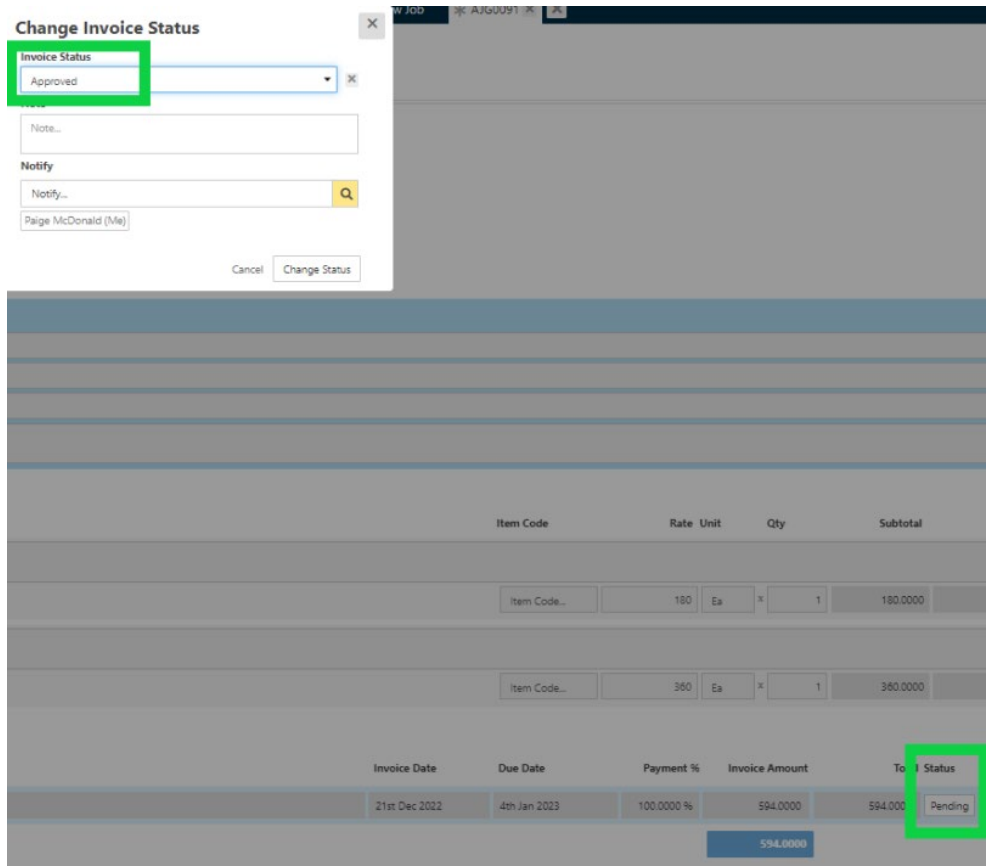
15. Select 'Generate'

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

Cancel Save

16. Page will refresh and invoice Status will update to 'Pending'

17. To approve the invoice, click on 'Pending' and update the Invoice Status to 'Approved' and select 'Change Status'



18. Invoice Status will now be 'Approved' and invoice will transfer to Exo.

Invoices							
Invoice Number	Invoice Date	Due Date	Payment %	Invoice Amount	Total	Status	
INV-176	21st Dec 2022	4th Jan 2023	100.0000 %	594.0000	594.0000	Approved	

If you have incorrectly created an invoice or need to make changes after you have changed the status to 'Approved', please cancel the invoice. This will trigger Prime to send a notification to accounts that the invoice has been cancelled and please recreate the invoice with the correct details.








19. Invoice PDF will now be saved under 'Documents'

CBA Insurance | Test211222



- CBA Insurance**
- Assigned**
Paige McDonald
- Case Manager**
N/A
- Supervisor**
N/A
- Estimator**
N/A
- Show More

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Documents

-  Share Upload Link
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Group By



▲ Invoices

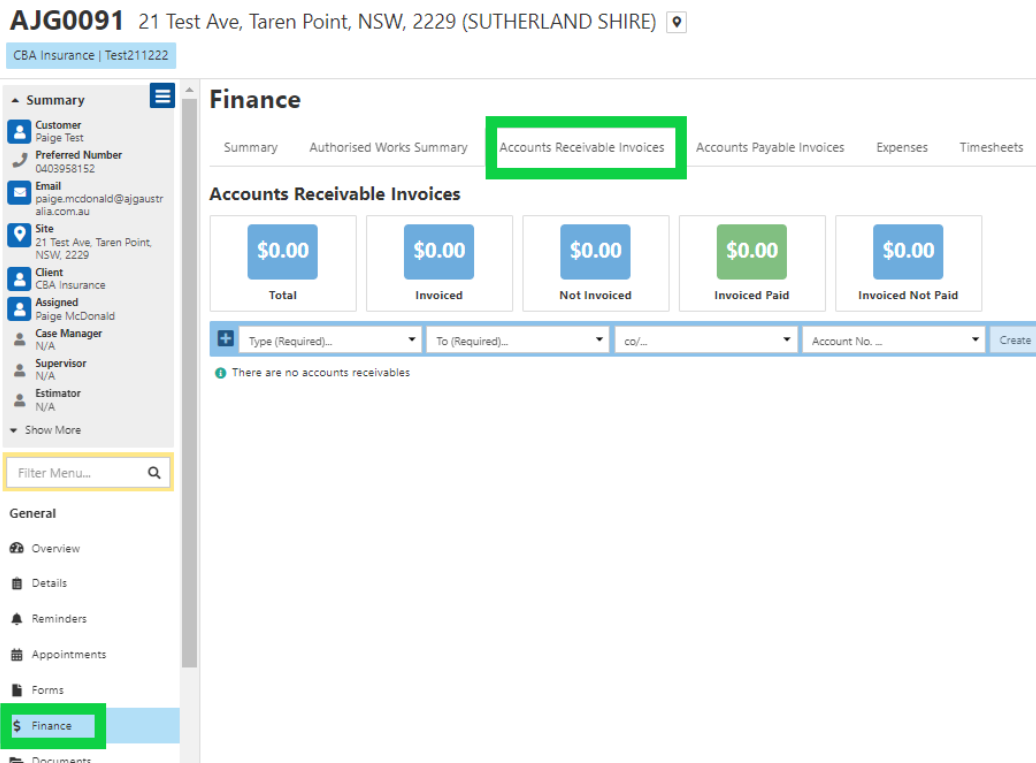
 tax_invoice_INV-176.pdf
 21st Dec, 2022 4:51 pm
Paige McDonald

- ▼ Reports**
- ▼ Scope of Works**

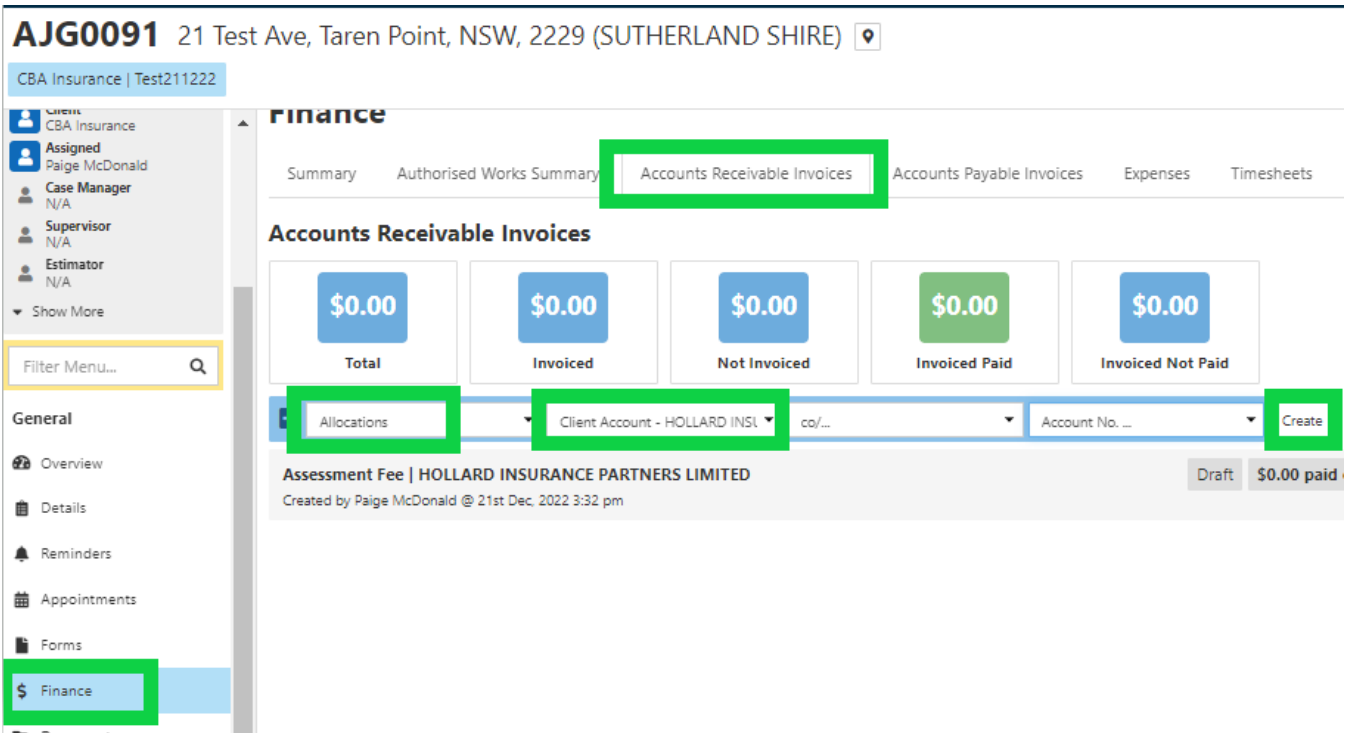
Creating an Assessment Report Invoice – External Assessor has completed the assessment

Creating the Specialist Report Invoice

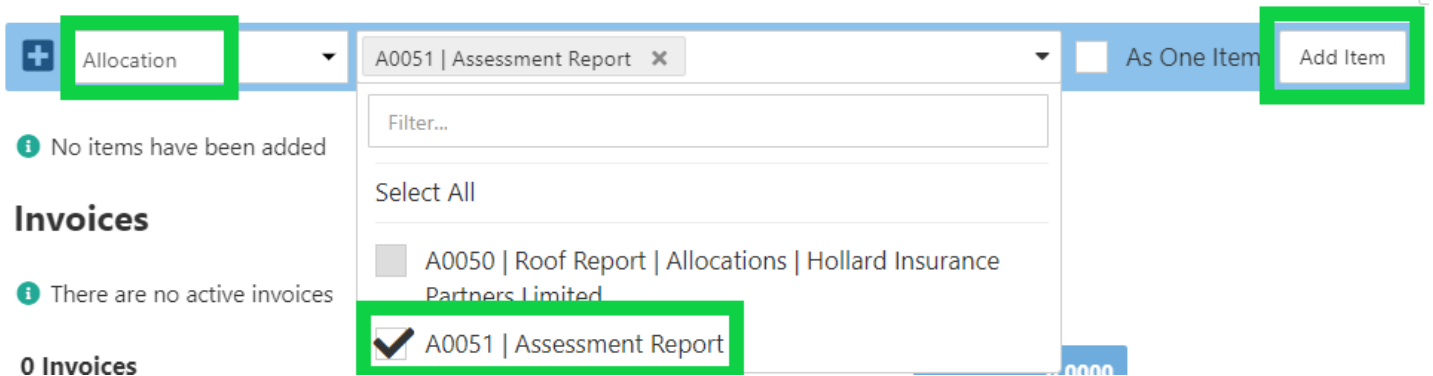
1. Under the 'Finance' section on the job, select the 'Accounts Receivable Invoices' tab



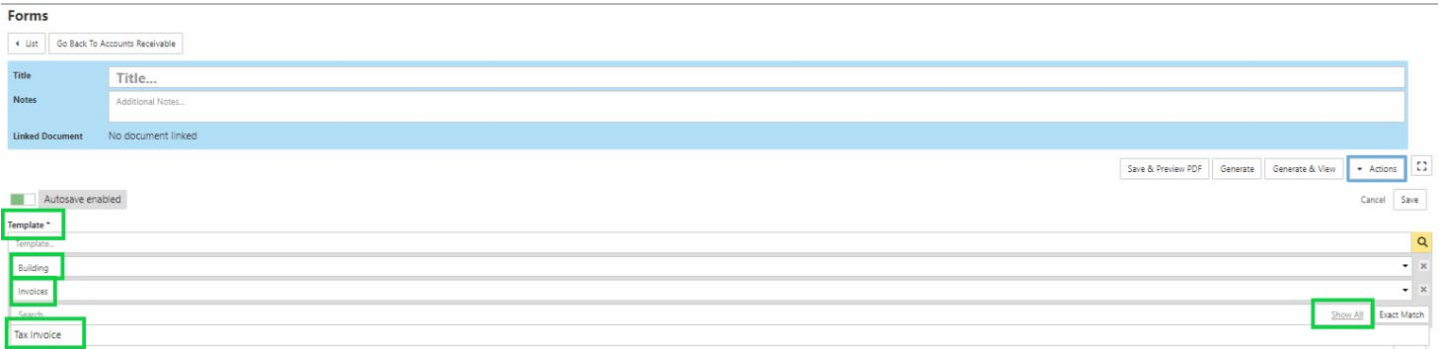
2. Type = Allocations
3. To = Bill To (For CBA claims, select Hollard Insurance Partners Limited)
4. Select 'Create'



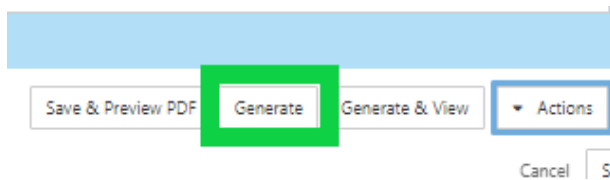
5. Under 'Items', 'Allocations' should already be selected
6. Click on 'Select from locked allocation estimate and select 'Assessment Report'
7. Select 'Add Item'



8. Check the 'Due Date' has been prefilled to 14 days from the created date.
9. Select 'Create PDF'
10. Select 'Template', Division = Building, Type = Invoices, Select 'Show All' and select 'Tax Invoice'

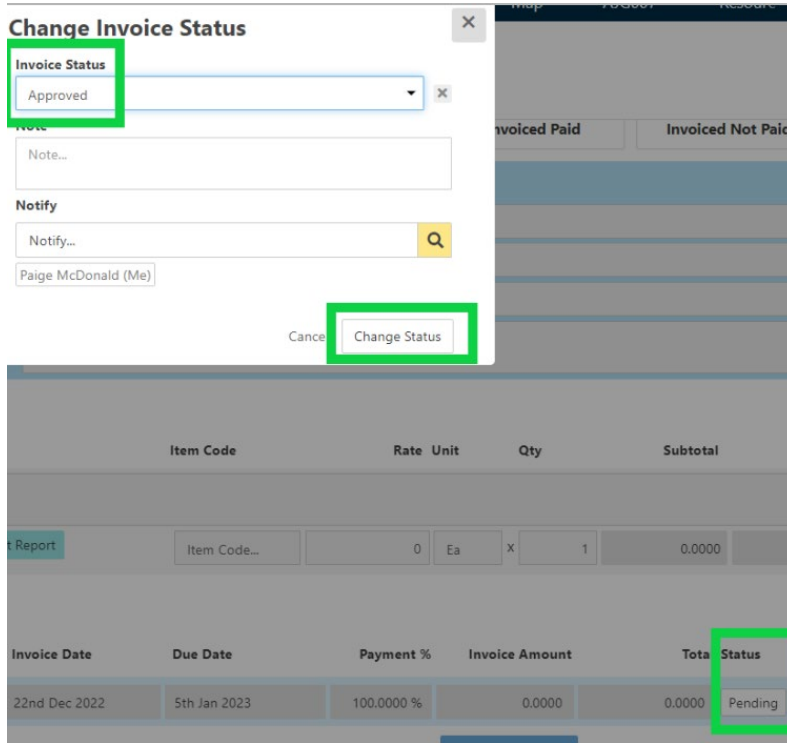


11. Select 'Generate'



12. Page will refresh and invoice Status will update to 'Pending'.

13. To approve the invoice, click on 'Pending' and update the Invoice Status to 'Approved' and select 'Change Status'



14. Invoice Status will now be 'Approved' and invoice will transfer to Exo.

Invoices

Invoice Number	Invoice Date	Due Date	Payment %	Invoice Amount	Total	Status
INV-177	22nd Dec 2022	5th Jan 2023	100.0000 %	0.0000	0.0000	Approved

1 Invoice

If you have incorrectly created an invoice or need to make changes after you have changed the status to 'Approved', please cancel the invoice. This will trigger Prime to send a notification to accounts that the invoice has been cancelled and please recreate the invoice with the correct details.

15. Invoice PDF will now be saved under 'Documents'

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CBA Insurance | Test211222

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Documents

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Invoices

tax_invoice_INV-172.pdf
21st Dec, 2022 3:40 pm
Paige McDonald

Reports

assessment_report.pdf
21st Dec, 2022 3:46 pm
Paige McDonald

Scope of Works

scope_of_works_Estimate_2022-12-21_15_23_47.pdf
21st Dec, 2022 3:24 pm
Paige McDonald