

Support Centre Prime Ecosystem

Updated 10.01.23

Prime Support Centre

Job Status – Work in Progress

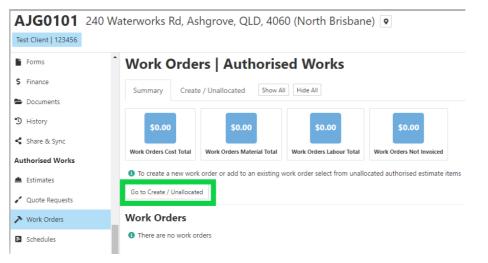
Repair Team

Sending a work order to a subcontractor

1. Within the job, select 'Work Orders' under Authorised Works

AJG0101 240	Waterworks Rd, Ashgrove, QLD, 4060 (North Brisbane) 💿
Test Client 123456	
Forms	Work Orders Authorised Works
\$ Finance	Summary Create / Unallocated Show All Hide All
Documents	
🕲 History	\$0.00 \$0.00 \$0.00
< Share & Sync	Work Orders Cost Total Work Orders Material Total Work Orders Labour Total Work Orders Not Invoiced
Authorised Works	
📥 Estimates	To create a new work order or add to an existing work order select from unallocated authorised estimate items
🖌 Quote Requests	Go to Create / Unallocated
> Work Orders	Work Orders
Schedules	There are no work orders
Allocations	1

2. Select 'Go to Create / Unallocated'



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

Vork Orders Auth	orised Works							
Summary Create / Unallocated	Show All Hide All							
Create a new work order or add items t	o an existing work order		•				0	
New Work Order	External Assign To Assign 0 items to Work Order							
rades Expand Collapse Categories E	xpand Collapse		_		_	▼ Vie	ew Options	
ms		Material	Select	Labour	Select	Total	Select	
 Cabinetry 			Select		Select		Select	
- Kitchen	Estimate 2023-01-10 10:41:34		Select		Select		Select	
Remove and replace (ladder frame mo	dular) kickboards to match the existing design and quality as close as possible approximately [Lm]	\$0.00	Select	\$368.42	Select	\$368.42	Select	1
Remove and replace (material) (Island b approximately [mm x mm x Lm]	enchtop Breakfast Bar) to match the existing design and profile as close as possible, inclusive of mitres and cut outs	\$0.00	Select	\$73.68	Select	\$73.68	Select	
Remove and replace (material) benchto	p to match the existing design and profile as close as possible, inclusive of mitres and cut outs - approximately [mm x	\$0.00	Select	\$368.42	Select	\$368.42	Select	

a. 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						3
Image: New Work Order External Assign To Q Assign 0 items to Work Order						
Trades Expand Collapse Categories Expand Collapse					-	View Options
Items	Material	Select	Labour	Select	Total	Select
▼ Cabinetry		Select		Select		Select
✓ Kitchen Estimate 2023-01-10 10.412	4	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

b. If you are sending all scope lines relating to a trade type, click 'Select' on the Trade Type line

tems	Material	Select	Labour	Select	Total	Select
▼ Cabinetry		Select		Select		Select
✓ Kitchen Estimate 2023-01-10 10:41:34	l	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
Remove and replace base [mm x mm] cabinetry 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 doors, inclusive of hardware to match the existing design and profile as close as possible - approximately [m2]	\$0.00	Select	\$73.68	Select	\$73.68	Select
Remove and replace drawers, inclusive of hardware to match the existing design and profile as close as possible - approximately [m2]	\$0.00	Select	\$73.68	Select	\$73.68	Select
Remove and replace end panels to match the existing design and profile as close as possible - approximately [m2]	\$0.00	Select	\$73.68	Select	\$73.68	Select
Remove and replace overhead cabinetry [mm x mm], to match the existing design and quality as close as possible - approximately [LM]	\$0.00	Select	\$368.42	Select	\$368.42	Select

4. Once you have selected the scope items, you will have the option to deselect if required. To deselect, click 'deselect' next to the scope line/s

Work Orders | Authorised Works

reate a new work order or add items to an existing work order						
New Work Order External Assign To Q Assign 8 items to Work Order						
rs Expand Collapse Categories Expand Collapse					• \	View C
	Material	Select	Labour	Select	Total	5
Cabinetry		Deselect		Deselect		De
✓ Kitchen Estimate 2023-01-10 10:41:3	4	Deselect		Deselect		De
Remove and replace (ladder frame modular) kickboards to match the existing design and quality as close as possible approximately [Lm]	\$0.00	Deselect	\$368.42	Deselect	\$368.42	D
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	Deselect	\$73.68	Deselect	\$73.68	3 D
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	Deselect	\$368.42	Deselect	\$368.42	2 D
Remove and replace base [mm x mm] cabinetry to match the existing design and quality as close as possible - approximately [LM]	\$0.00	Deselect	\$368.42	Deselect	\$368.42	D
Remove and replace doors, inclusive of hardware to match the existing design and profile as close as possible - approximately [m2]	\$0.00	Deselect	\$73.68	Deselect	\$73.68	D
Remove and replace drawers, inclusive of hardware to match the existing design and profile as close as possible - approximately [m2]	\$0.00	Deselect	\$73.68	Deselect	\$73.68	B D
Remove and replace end panels to match the existing design and profile as close as possible - approximately [m2]	\$0.00	Deselect	\$73.68	Deselect	\$73.68	B De
Remove and replace overhead cabinetry [mm x mm], to match the existing design and guality as close as possible - approximately [LM]	\$0.00	Deselect	\$368.42	Deselect	\$368.42	D

- 5. Next to New Work Order, select 'External'
- 6. Click on 'Assign To..' You will then have the option to filter to a trade type and/or region.
 - a. 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 nev 	w work order or add items to	an existing work orde	er		
New Wor	k Order 🗸 🔻	External 🝷	Assign To	Q	Assign 8 items to Work Order
			Cabinetry 🝷	×	
			Supplier Tag	•	
			SUTHERLAND SHIRE 🗸	×	
			Search Show All Exact Ma	atch	

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

Assign To	Q	A
Cabinetry	×	I
Supplier Tag	-	
SUTHERLAND SHIRE	×	
Search Show All Exact Ma	atch	

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

Work O	orders Aut	norised W	orks		
Summary	Create / Unallocated	Show All Hide Al			
 Create a nev 	v work order or add items	to an existing work ord	er		
New Work	c Order 🗸 🔻	External 🔻	Test Subcontractor	Q 🗙 Assig	gn 8 items to Work Order
•					0 View Contact
I No co	ompliance records				

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

Work (Work Orders Authorised Works										
Summary	Create / Unallocated	Show All Hide All									
🚯 Create a n	ew work order or add items to	o an existing work orde	er								
• New Wo	rk Order 🗸 🗸	External 🔻	Test Subcontractor	🔍 🗙 Assign 0 items to W	Vork Order	Items assigned successfully View Work Order					
				•	-						

9. 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

Work Orders | Authorised Works

Summary	Create / Unallocated	AJG0101-006 Draft	Show All Hide All
Lock			
AJG0101-0	0061		Draft
Assigned To	2 Test Subcontract	or	Check Availability
Start Date	Date		
Completion Date	Date		
Notes	Additional Notes		
Linked Document	t Linked Document		•
Tags	No Tags		
-		2022.2.05	
Created	Paige McDonald @ 10t	h Jan, 2023 2:05 pm	

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

AJG0101-00	61						Draft	
Assigned To	2					<i>"</i>	Check Availability	
Start Date	11 Jan, 2023 🛗							ſ
Completion Date	25 Jan, 2023 🛗							
Notes	Additional Notes							
Linked Document	Linked Document						-	

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.

11. 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 X Show All Hide All	
Lock	Notify 😮 🗸 Actions
AJG0101-0061	Draft Sell Cost Profit Margin 0
Assigned To Siko Constructions Pty Ltd	Total \$2,431.57 \$1,870.44 23.08% 0
	GST 3 \$221.05 \$170.04 VInc GST 3
Start Date 11 Jan, 2023	Subtotal \$2,210.52 \$1,700.40
Completion Date 25 Jan, 2023	32,210.32 \$1,100m0
Niekee	

12. You will have the option to reduce the subcontractor allowance by adjusting the material allowance, hrly rate or hours. 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 Reset	GST Free	Labour	\$70.85	hr	3	\$460.53	\$212.55	
	Remove and replace (ladder frame modular) kickboards to match the existing design and quality as	s close as possib	le approximate	ely [Lm]					
	Notes		Material	\$0.00	ea	1	\$0.00	\$0.00	\$212.55
	✓ Estimate Item Reset	GST Free	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 closed	se as possible -	approximately	[LM]					
	Notes		Material	\$0.00	ea	1	\$0.00	\$0.00	\$141.70
	✓ Estimate Item Reset	GST Free	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

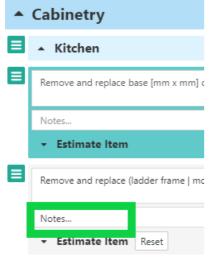
If you need to reset the scope line allowance to go back to the original allowance, click on the scope line and select 'Reset'

3	Cabinetry
	🔺 Kitchen
E	Remove and replace base [mm x mm] cabinetry to match the ex
	Notes
	✓ Estimate Iten Reset
E	Remove and replace (ladder frame modular) kickboards to mat
	Notes
	▼ Estimate Item Reset
-	

13. 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	🖌 Inc GST 🚯
Subtotal	\$2,210.52	\$1,487.85	

14. 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



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

Work C	Orders Auth	orised Works
Summary	Create / Unallocated	AJG0101-0061 Draft X
Lock		
A 100404	0004	

16. Select 'Preview PDF'

Work Orders Authorised Works							
Summary Create / Unallocated AJG0101-0061 Locked X She	how All Hide All						
Work Order Is In Progress Edit	Email Work Order Not	ify ? Create PDF	Preview PDF	✓ Actions			
		C-11	C+ D	A A			

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

ıp.			
			Cancel Generate
1 / 17 - 100%	+ 🖸 🕎		± a :
AJ Grant	RESIDENTIAL AND COMMERCIAL BUILDING SERVICES a quality Partnership built on trust		
ABN:		10/01/2023	
License: 131460C	Phone:	1300 254 726	
P.O Box 3128 Kirrawee DC NSW 2232	Fax:	(02) 9542 2033	
	PURCHASE ORDER		

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

Work O	rders Auth	orised Work	S					
Summary	Create / Unallocated	AJG0101-0061 Locked	X Show All Hide All					
Work Order	Is In Progress Edit							
AJG0101-0	0061							
Assigned To								
Start Date	11 Jan, 2023 🛗							
Completion Date	25 Jan, 2023 🛗							
Notes	Additional Notes							
Linked Documen	t 🕒 Purchase Order -	purchase_order_AJG0101-006	i1_Niko_Constructions_Pty_Ltd.pdf					
Tags	No Tags							
Created	Paige McDonald @ 10th	Paige McDonald @ 10th Jan, 2023 2:05 pm						

19. 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	0	Create PDF	Preview PDF	•	 Actions]
≓ Sync								Alloca	te Work Order]
AJG0101-0061			Locked		Se	II	Cost	Prof	fit Margin 🖪	

20. 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 Al	Collapse All					
▼ Contracts	2 Documents					
 Invoices 	1 Document					
 Purchase Order Note 	1 Document	-				
Note						
	Reset Sen	ıd				