Trade Invoicing an Allocation

1. Open Prime
2. Select 'Dashboard' and 'Allocations'
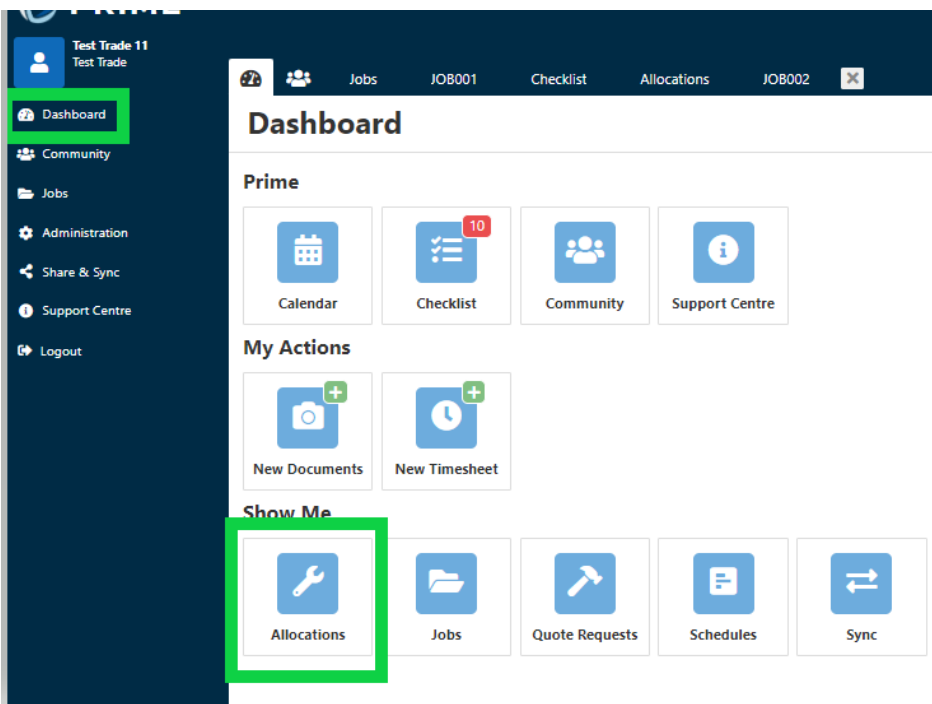
3. Select the allocation from the list that you are invoicing

Allocations

	Reference Number	Label	Job Number	Client	Assigned Contact	Assigned To	Allocation Type	Allocation Status	Tags
📌		AJG0102-0097	JOB002	AJG Australia			Work Order	Ready To Invoice	
📌		AJG0102-0084	JOB002	AJG Australia			Work Order	Ready To Invoice	

4. Update the completed date, time and any other details not already filled in and click 'Update'

Allocation Type *

Work Order ▾

Label *

AJG0102-0097 ✕

Assign To Contact

Assign To Contact... 🔍

Limit

$0.00 ✕

Instructions

Allocation Work Order ✕

Customer First Contacted On

24 Jan, 2023 📅 ✕

Today | +1 Day | -1 Day | +1 Week | -1 Week | +1 Month | -1 Month

Customer First Contacted Time

09:42 AM 🕐 ✕

Now | +15 Min | -15 Min | +1 Hour | -1 Hour | Nearest Hour
Start Of Day | End Of Day

Site Attended / Start

25 Jan, 2023 📅 ✕

Today | +1 Day | -1 Day | +1 Week | -1 Week | +1 Month | -1 Month

Site Attended / Start Time

06:27 AM 🕐 ✕

Now | +15 Min | -15 Min | +1 Hour | -1 Hour | Nearest Hour
Start Of Day | End Of Day

Completed

25 Jan, 2023 📅 ✕

Today | +1 Day | -1 Day | +1 Week | -1 Week | +1 Month | -1 Month

Completed Time

07:44 AM 🕐 ✕

Now | +15 Min | -15 Min | +1 Hour | -1 Hour | Nearest Hour
Start Of Day | End Of Day

Works Completed

Completed make safe to roof - tarp front ✕

Update

5. Select 'Change Status' and update the allocation status to 'ready to be invoiced'

Summary | AJG0102-0097 Work Order ✕ | Show All | Hide All

Work Order | AJG0102-0097
Created by Test Trade @ 25th Jan, 2023 9:40 am
Ready To Invoice | Change Status

6. Scroll down to the 'Allocation Estimate' and update the material and labour to your invoiced amount. You invoice will be created based on the amount entered

7. Check the 'Total' is correct and then 'Lock' the estimate

8. Click on the 'Finance' section and 'New Accounts Receivable Invoice'

9. Select the allocation you are invoicing under 'Items'

Accounts Receivable Invoices

◄ List

⇄ **Sync Options**

☑ Sync This Invoice To Ajg Australia

To *

AJG Australia

Type *

Allocations ▼ ✕

Items *

Items... ▼

AJG0102-0066
AJG0102-0084
AJG0102-0097

25 Jan, 2023 🗓 ✕

| Today | +1 Day | -1 Day | +1 Week | -1 Week | +1 Month | -1 Month |

Due Date *

Due Date... 🗓

| Today | +1 Day | -1 Day | +1 Week | -1 Week | +1 Month | -1 Month |

Document *

Document... ▼

Upload & Link New Document

Cancel   Save

10. Check 'sync this invoice to AJG Australia' is ticked, enter the invoice number, invoice date and due date (30 days), select the purchase order document and click 'Save

11. Invoice will automatically sync to AJG Australia and invoice will now be displayed under the finance section of the job