Make Safe Coordinators Responsibility
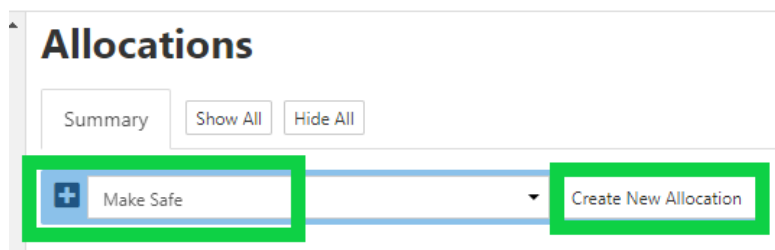
Creating and sending an allocation – Make Safe

1. Within the job, select 'Allocations'
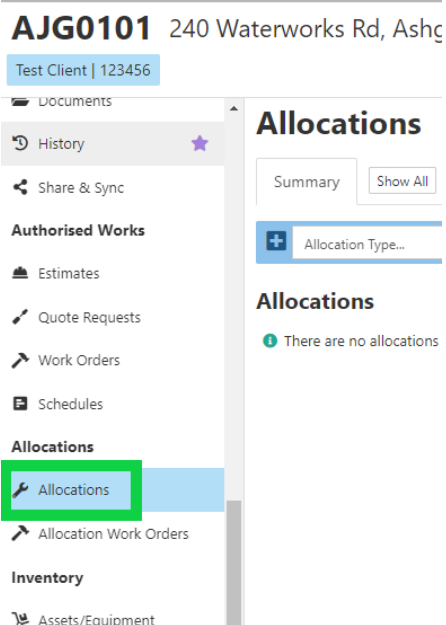
2. Select 'Make Safe' as the allocation type and click 'Create New Allocation'

3. Complete the allocation details and click 'Update'

Note: Limit = make safe authority limit with the IC

Allocation

Allocation Type *

Make Safe

Label *

Make Safe

Assign To Contact

Assign To Contact...

Limit

$2,000.00

Instructions

Attend site and install tarp on roof

Customer First Contacted On

10 Jan, 2023

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

Customer First Contacted Time

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

If the make safe has already been completed (e.g., after hours night before), also enter the site attended/start date and time, the completed date and time, works completed section and click 'Update'

Site Attended / Start

Site Attended / Start...

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

Site Attended / Start Time

Site Attended / Start Time...

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

Completed

Completed...

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

Completed Time

Completed Time...

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

Works Completed

Works Completed...

Update

4. To assign the make safe allocation to a staff member, select the pencil next to 'This allocation is currently not assigned', select the user and select 'Change Assigned'

5. To add a linked document/s to the allocation (a document that has been previously uploaded within the documents section within the job),

   a. Select 'Edit Linked Document'

   b. Select the document/s and click 'Update'

6. To add a new document/s to the allocation

a. select 'Upload & Link'

Linked Documents

Edit Linked Documents

Group By | Document Type ▾ | Show Obsolete | 🖼 View Photos

Upload & Link

ⓘ There are no documents

b. Drag and drop the file or select file from a folder

Add Documents

⇄ **Sync Options**

Sync documents to a linked contact

Contact... ▾

Files

☁ Drop files or | Choose Files

Max file size 100MB

c. Select Document Type and enter description
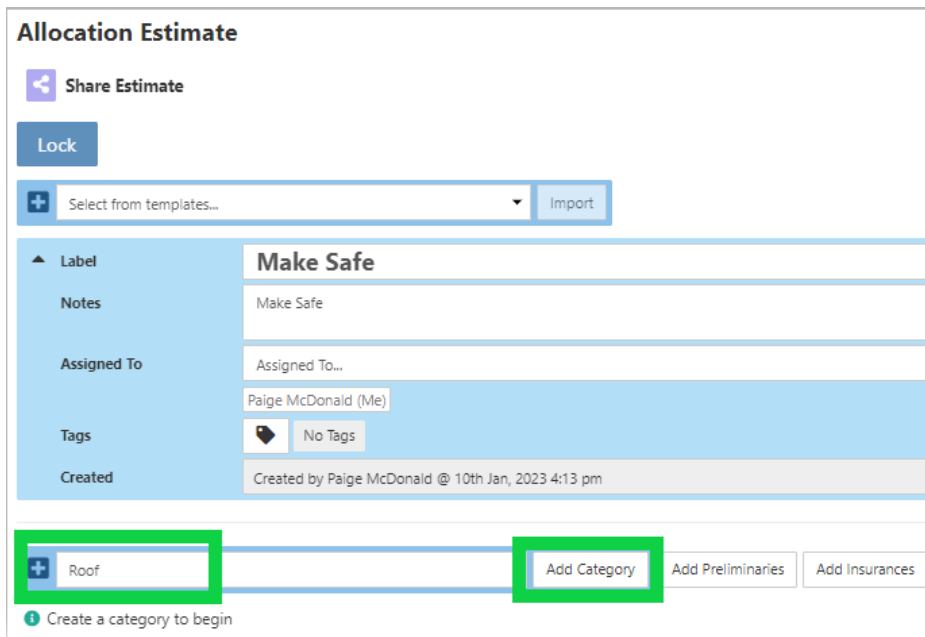
Preview

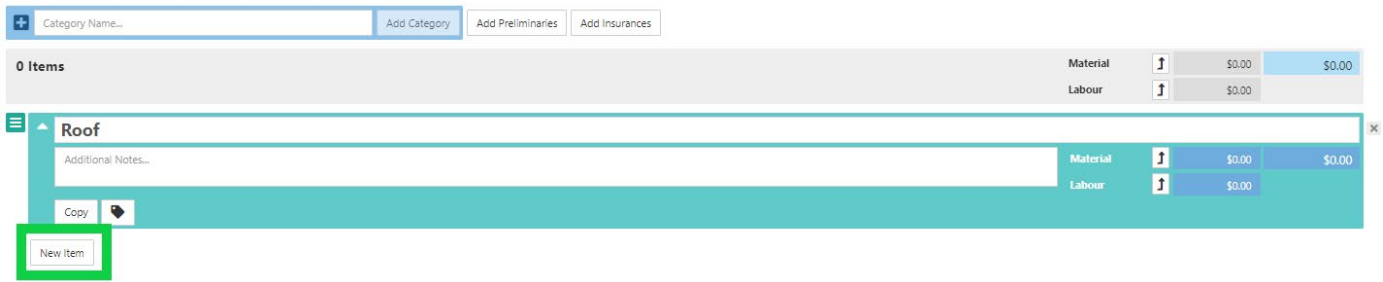Test pic.jfif

Document Type *
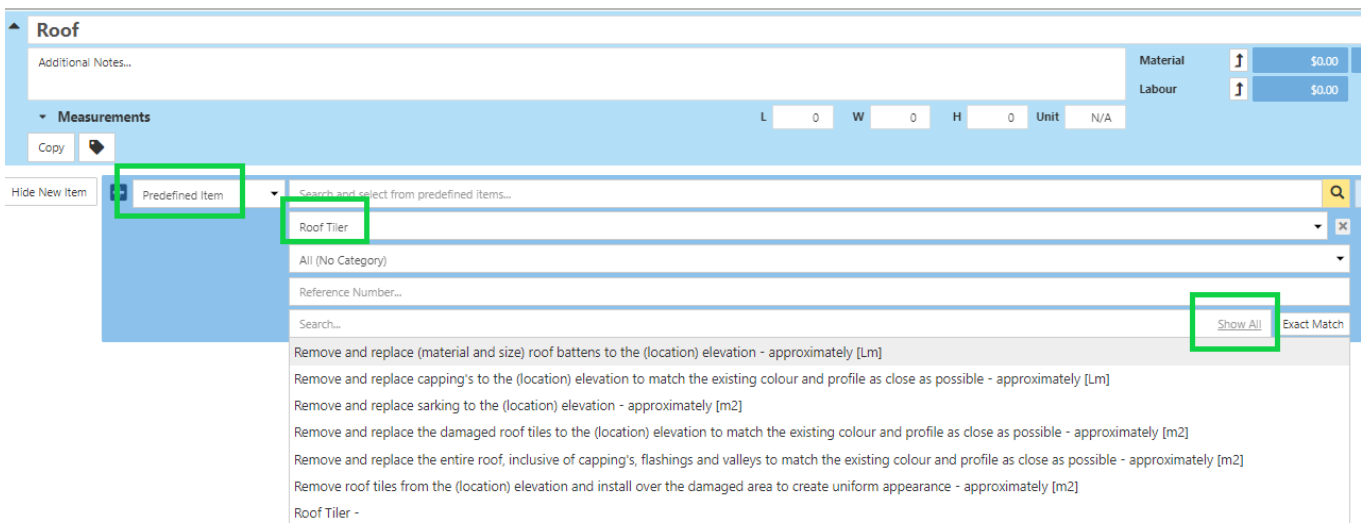
Site Photos ▾

Description

Roof ✕

Creating an estimate

1. Scroll down to 'Allocation Estimate' section
2. Enter then room as the category name and select 'Add Category'

Allocation Estimate

Share Estimate

Lock

| Select from templates... ▼ | Import |

▲ Label	**Make Safe**
Notes	Make Safe
Assigned To	Assigned To...
	Paige McDonald (Me)
Tags	🏷 No Tags
Created	Created by Paige McDonald @ 10th Jan, 2023 4:13 pm

| ➕ Roof | | Add Category | Add Preliminaries | Add Insurances |

ℹ Create a category to begin

3. Select 'New Item'

| ➕ Category Name... | Add Category | Add Preliminaries | Add Insurances |

| 0 Items | | Material | ⬍ | $0.00 | $0.00 |
| | | Labour | ⬍ | $0.00 | |

☰ ▲ **Roof**				✕
Additional Notes...		Material	⬍	$0.00	$0.00
		Labour	⬍	$0.00	
Copy 🏷				

New Item

4. Select 'Predefined Item'
5. Select 'Trade'
6. Click 'Show All', select the predefined scope line and click 'Add Item' - *If there is no predefined scope line, you can change 'Predefined Item' to new item and manually create the required scope*

▲ **Roof**				
Additional Notes...		Material	⬍	$0.00
		Labour	⬍	$0.00
▼ Measurements	L 0 W 0 H 0 Unit N/A			
Copy 🏷				

Hide New Item | Predefined Item ▼ | Search and select from predefined items... 🔍

Roof Tiler ▼ ✕

All (No Category) ▼

Reference Number...

Search... | Show All | Exact Match

Remove and replace (material and size) roof battens to the (location) elevation - approximately [Lm]

Remove and replace capping's to the (location) elevation to match the existing colour and profile as close as possible - approximately [Lm]

Remove and replace sarking to the (location) elevation - approximately [m2]

Remove and replace the damaged roof tiles to the (location) elevation to match the existing colour and profile as close as possible - approximately [m2]

Remove and replace the entire roof, inclusive of capping's, flashings and valleys to match the existing colour and profile as close as possible - approximately [m2]

Remove roof tiles from the (location) elevation and install over the damaged area to create uniform appearance - approximately [m2]

Roof Tiler -

7. Update the description as required

8. Enter the Estimate

9. Lock the Estimate

10. Select 'Assign to Work Order'

11. Select the trade as the 'Assign To' and click 'Assign'

Assign Work Order   ☒

Work Order
┌──┐
│ New Work Order   ▾ │
└──┘
Assigned Type
┌──────────────────────────────────┐ ☒
│ External   ▾ │
└──────────────────────────────────┘
Assign To *
┌──────────────────────────────┐ 🔍 ☒
│ Test Trade   │
└──────────────────────────────┘

                        Cancel   **Assign**

▲ **Test Trade Compliance Summary**   ⓘ   View Contact
ⓘ No compliance records

12. Enter the Start and Completion Date and add any additional notes for the subcontractor

AJG0101-0063

Assigned To	👤 Test Trade
Start Date	11 Jan, 2023 📅
Completion Date	11 Jan, 2023 📅
Notes	Allocation Work Order
Linked Document	Linked Document...
Tags	🏷 No Tags
Created	Paige McDonald @ 11th Jan, 2023 10:54 am

If you need to check the trade availability, select 'Check Availability'

AJG0101-0063   Draft

Assigned To	👤 Test Trade	✏	Check Availability
Start Date	11 Jan, 2023 📅
Completion Date	11 Jan, 2023 📅
Notes	Allocation Work Order
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.

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

AJG0101-0063   Draft

Assigned To	👤 Test Trade
Start Date	11 Jan, 2023 📅
Completion Date	11 Jan, 2023 📅
Notes	Allocation Work Order

	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	

Notify ❓ ▾ Actions

14. 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.

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'
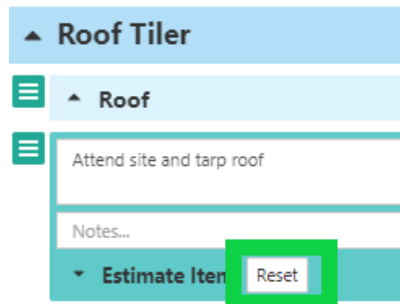
15. If you have adjusted the allowance, the Cost and Profit Margin will be updated to reflect the changes made

16. 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
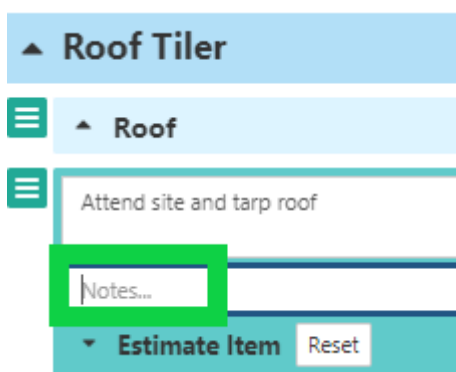
17. Once you are ready to send to send the work order, select 'Lock' at the top of the page
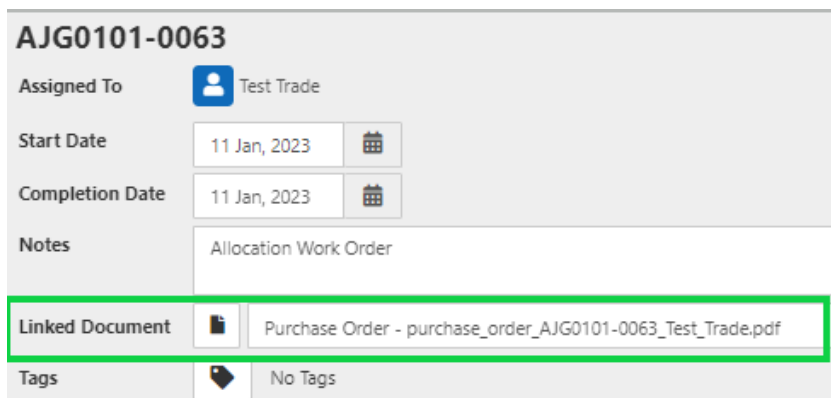
Work Orders | All

| Summary | AJG0101-0063 | Draft |

🛈 Linked Allocation | Make Safe

Lock

AJG0101-0063

Assigned To	👤 Test Trade
Start Date	11 Jan, 2023
Completion Date	11 Jan. 2023

18. Select 'Preview PDF'

Work Orders | Allocation

| Summary | AJG0101-0063 Locked ✕ | AJG0101-0064 Draft ✕ | Show All | Hide All |

🛈 Linked Allocation | Make Safe   Go To Allocation

| Work Order Is In Progress | Edit | Email Work Order | Notify | ❓ | Create PDF | Preview PDF | ▾

| AJG0101-0063 | | Locked | | Sell | Cost | P |
| Assigned To | 👤 Test Trade | | Total | $625.42 | $424.60 | |

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

Cancel | Generate

1 / 16 | — | 90% | + | ⊡ ⟳

AJ Grant building
RESIDENTIAL AND COMMERCIAL
BUILDING SERVICES
a quality Partnership built on trust

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

AJG0101-0063

Assigned To	👤 Test Trade
Start Date	11 Jan, 2023 📅
Completion Date	11 Jan, 2023 📅
Notes	Allocation Work Order
Linked Document	📄 Purchase Order - purchase_order_AJG0101-0063_Test_Trade.pdf
Tags	🏷 No Tags

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

22. 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

23. Select 'Go to Allocation'

24. Work order will now be displayed under 'Active'

25. Update the Allocation Status to 'Allocated', by selecting 'Change Status'. It is important that the allocation status is updated throughout the make safe, for reporting purposes