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.
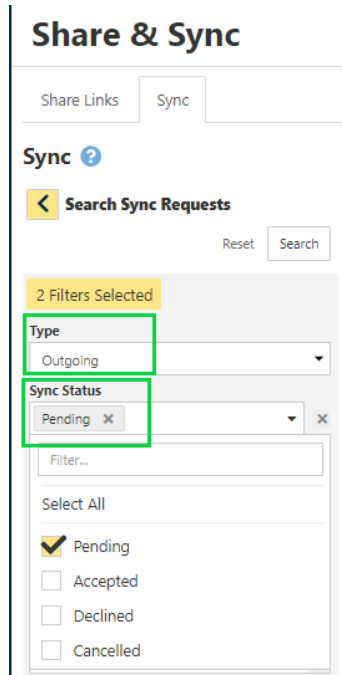
Company Sync Queue

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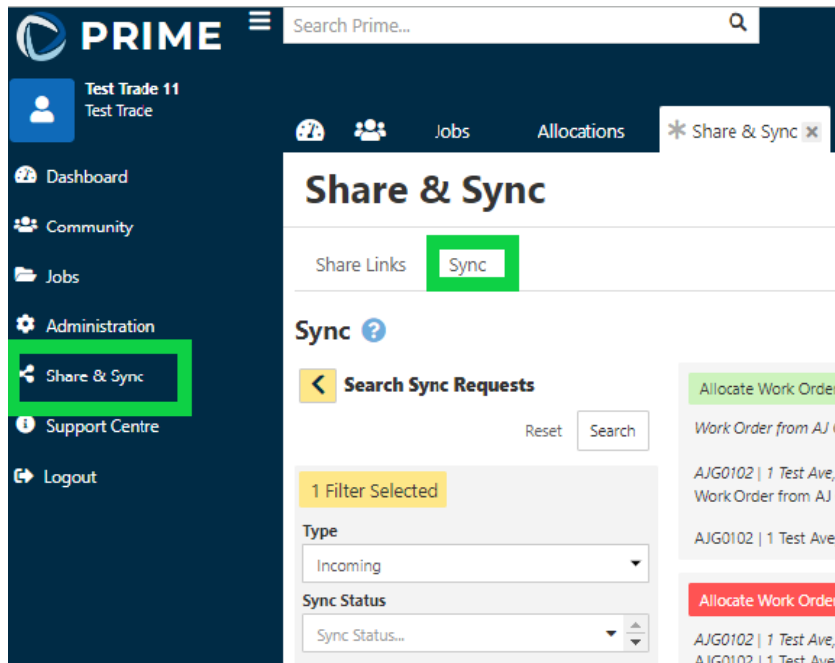
You can search for 'incoming' (syncs received from AJG Australia) or 'Outgoing' (syns from your company back to AJG Australia).

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'
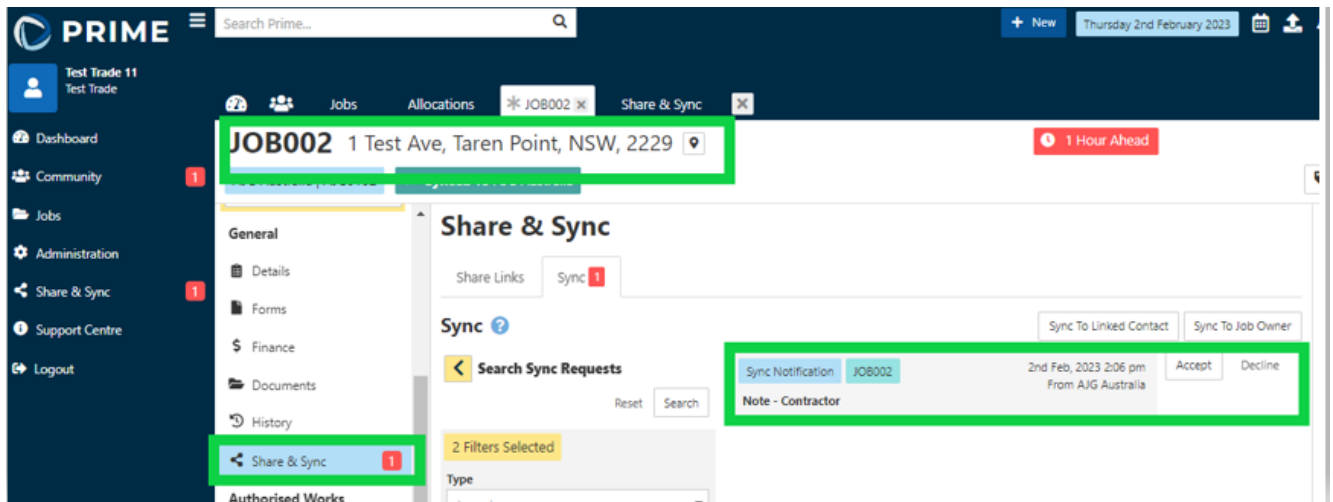
Trade Accepting a Work Order

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.

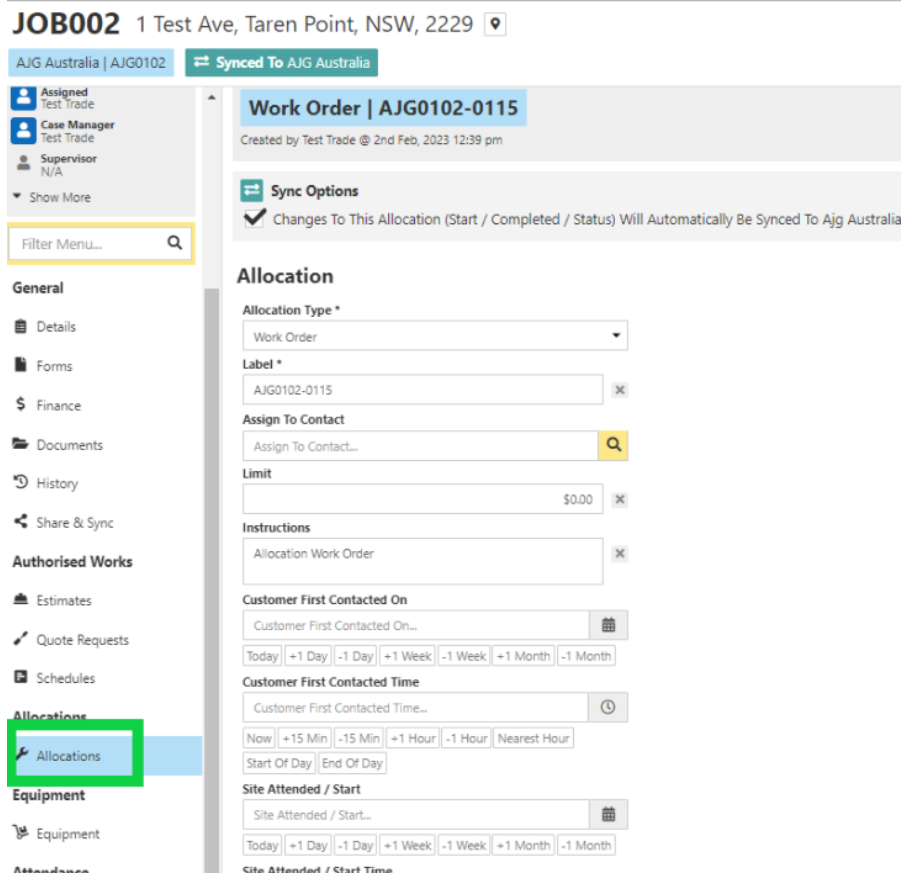   Within Prime, select 'Share & Sync' section, 'Sync' tab and then 'Accept' the Work Order.
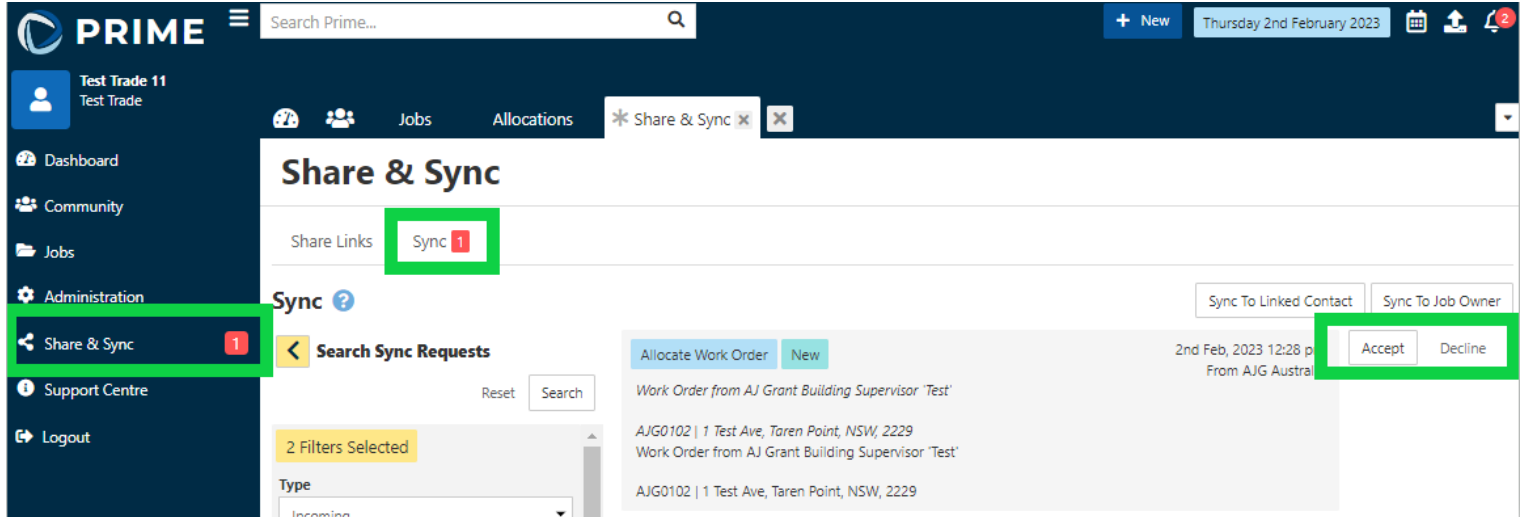
3. Once you have accepted the Work Order a job will be created within your portal and you can click within the work order to navigate to job.
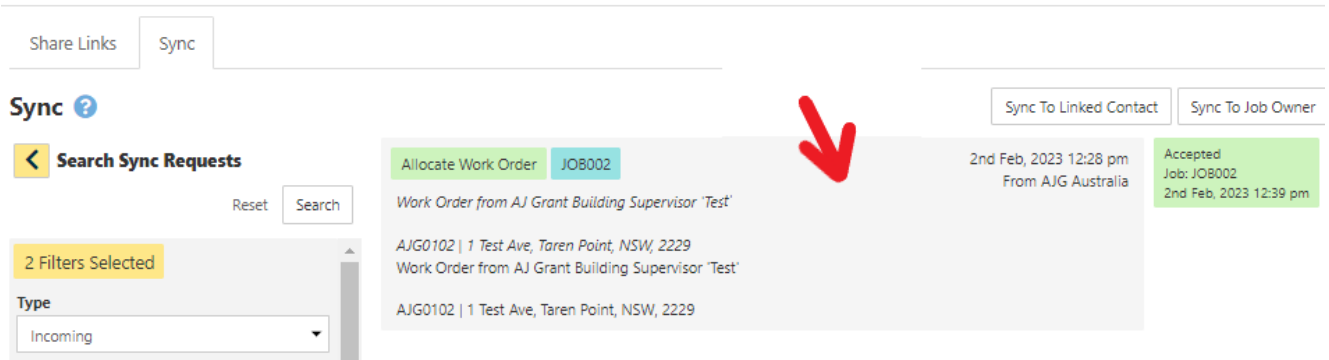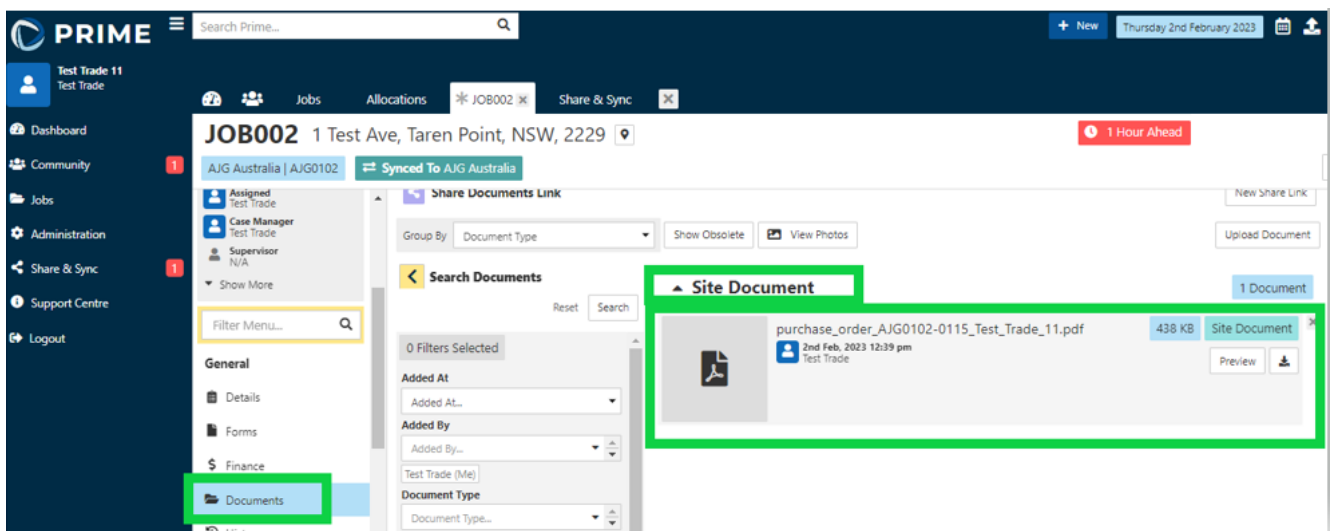
4. All Work Orders are created as an 'Allocation' within the job

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

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.

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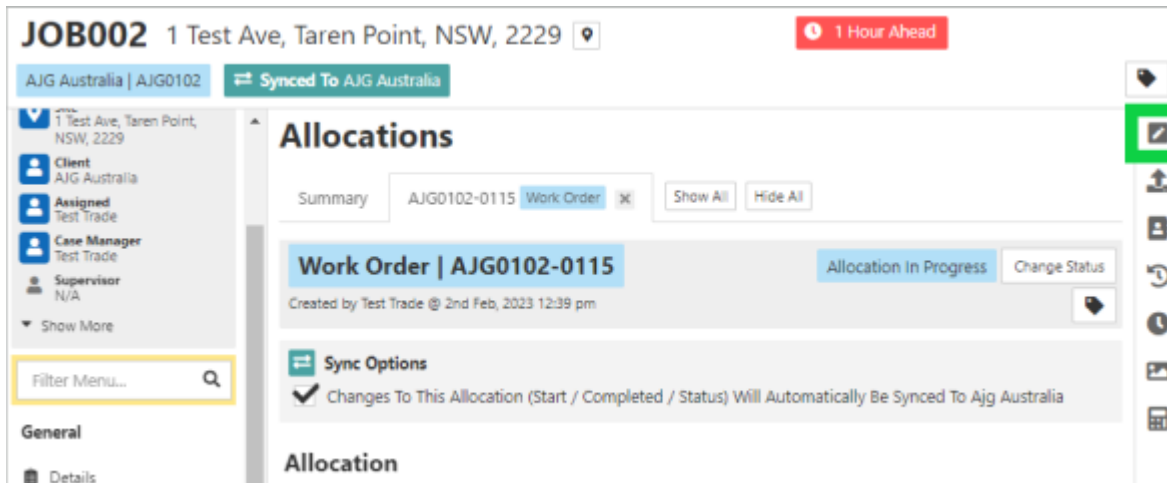
2. Ensure 'Sync this note AJG Australia' is ticked
3. Next to 'Classification' select Client
4. Enter the reason for declining the work order
5. Select 'Add Note to History'

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'.