

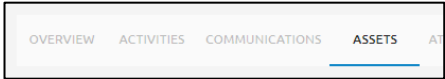


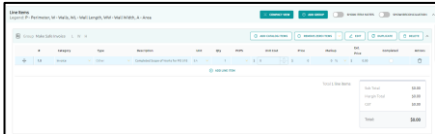


Submit an invoice (Trade)

This work instruction is for Bay Building Group Trades and will demonstrate how to submit invoices by request type in Crunchwork.

- A. Step by step – Submit an invoice – repairs & specialist report..... 1
- B. Step by step – Submit an invoice – make safe job..... 2

A. Step by step – Submit an invoice – repairs & specialist report

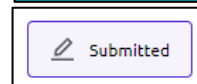
| # | Step Instruction | Desktop Image |
|---|---|---|
| 1 | Open the job, click the <i>Assets</i> tab. A draft invoice has been created. |  |
| 2 | Click the <i>eye</i> icon next to the invoice to open. A new page will open in the <i>invoices</i> module, ready for completion. |  |
| 3 | Ensure all the <i>Invoice Details</i> are correct and update your <i>Vendor Reference</i> . |  |
| 4 | A line item has been created in the <i>Line Items</i> section. Update the unit cost with your invoice amount (less gst). |  |

Note: The budget for the purchase order is fixed and is visible on the invoice in the *Invoice Details* section, under the *Purchase Order Budget inc GST* field. You can invoice to that amount as agreed prior to job allocation. If additional works are required on site, please contact your repair coordinator / supervisor prior to completing works so authority can be sought from Insurer.

- 5 To submit your invoice, click *Submit* in the top right-hand corner.



Once submitted the invoice status at the top of the invoice panel will update to 'Submitted'.



- 6 To exit invoices and navigate back to the job, select the *Jump To* button on the top left-hand side of the page.



Note: If the QA (Quality Assurance) has already been passed by your coordinator / estimator / supervisor, the status of the job will display as 'Invoiced' and the invoice as 'Approved Pending Payment'.

If QA is yet to be reviewed, the status of the invoice will display as 'Pending Job Completion Review'.

Please contact your coordinator / estimator / supervisor if you have any questions relating to the approval of works and invoice.

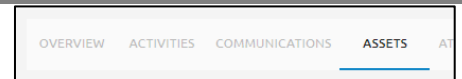
- 7 No further actions are required – Invoice will be submitted for payment based on trading terms once QA passed.

B. Step by step – Submit an invoice – make safe job

Step Instruction

Desktop Image

- 1 Open the job, click the *Assets* tab. A draft invoice has been created.



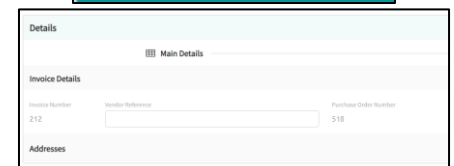
- 2 Click the *eye* icon next to the invoice to open.



A new page will open in invoices, ready for completion.



- 3 Ensure all of the *Invoice Details* are correct and update your *Vendor Reference*.



- 4 A line item has been created in the *Line Items* section. Update the unit cost with your invoice amount (less gst).



Note: The minimum allowance for a make safe purchase order is visible on the invoice in the *Invoice Details* section, under the *Purchase Order Budget ex GST* & *Purchase Order Budget inc GST* fields. Invoice for costs incurred on site and discussed with job coordinator. Unlike repair and specialist purchase orders costs will need to be approved prior to invoice submission for payment.

- 5 To submit your invoice – Click *Submit* in the top right-hand corner.



Once submitted the invoice status at the top of the invoice panel will update to 'Pending QA'.

- 6 To exit invoices and navigate back to the job, select the *Jump To* button on the top left-hand side of the page.
- 7 It is important to note that for a make safe job, the report and draft invoice are both required for QA approval. Please ensure both are ready for submission.

The job status will update to 'Complete Pending QA'.

The status of your invoice will be 'Pending Job Completion Review'.

- 8 Once QA has been approved, the status of the job will display as 'Invoiced' and the status of the invoice will display as 'Approved Pending Payment'.

No further action is required – Invoice will be submitted for payment based on trading terms.

