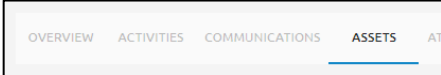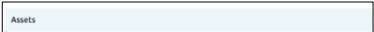## Complete reports (Trade)

For every job allocated by Bay Building Group, a report with accompanying photos, based on job allocated, is required to confirm works completed on-site. This confirms quality of works on-site and completion of job allocated. Submitted reports need to be approved by the job coordinator prior to invoice submission for payment.
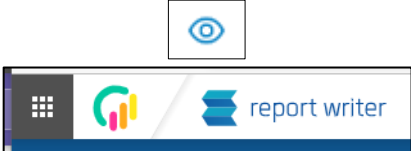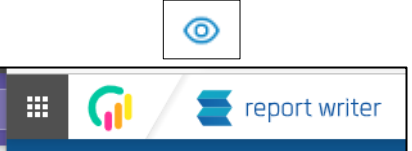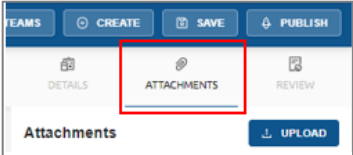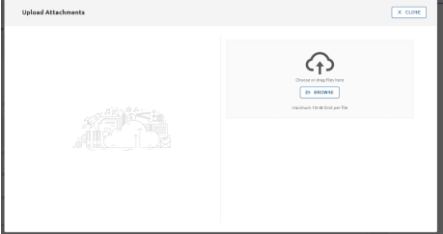
This work instruction is for Bay Building Group Trades and will demonstrate how to complete the different report types in Crunchwork.
_Toc155362509

A. Step by step – Job completion report

#	Step Instruction	Desktop Image	Mobile Image
1	Every job completed for Bay Building Group requires a Completion Report. Open the allocated job, click the *Assets* tab. A draft report (& Invoice) is ready to be completed once site has been attended.	OVERVIEW ACTIVITIES COMMUNICATIONS **ASSETS** AT	Assets
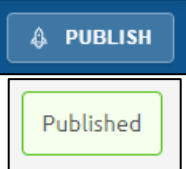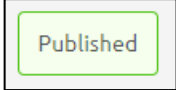
2	Click the *eye* icon next to the report. A new page will open in report writer, ready for completion.		
3	Start by uploading attachments / photos to the report. Click *Attachments* in the right-hand panel and then click on *Upload*.		
4	A new *Upload Attachments* pop-up will appear on your screen. Bulk add photos by choosing or dragging files. This should include pre-start and completion photos.		

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5	Select each uploaded image to add details like *Title* & *Description* in the information box*.* **TIP:** Select the information box, which will highlighted with a blue border, to view the related photo in the right panel of the pop-up.		
6	Once all completed, to save, click *Upload Attachments* (save icon), then click *Ok.*		
7	Back on the report writer page, fill out all the relevant report details. **TIP:** Grey bordered fields should be updated and fields with a red asterix '*' are compulsory. Fields with fixed choices have a dropdown arrow to the right. Date selections have calendar symbol in the field. **TIP:** If a required field is not completed, an error will display: Please fill all the required fields. ✕		
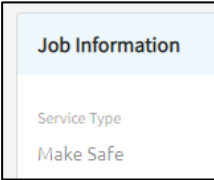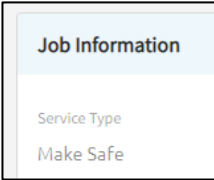
	SHOW NAVIGATION ◀ ▶	Click on the arrow in 'Show Navigation Panel' on the left-hand side to view where the missing fields are. These will be bordered in red and noted with 'This field is required'			
8		Once all fields have been completed and attachments have been uploaded, click *Publish* in the top right corner to update status. In Mobile: Bottom right of screen. Once published the report status at the top of the report panel will update to 'Published'.	⚡ PUBLISH Published		Published

ⓘ	**Note:** You can save the report at any time and return to complete by selecting the *Save* button at the top right-hand side of the page.	💾 SAVE

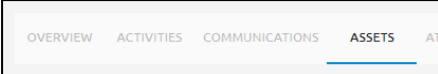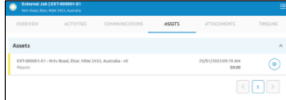| 9		To exit report writer and navigate back to the job, select the *Jump To* button on the top left-hand side of the page. In Mobile: Bottom left of screen.	⟲ JUMP TO		⟲ JUMP TO

ⓘ	**Note:** The status of the job will update to 'Complete Pending QA'. This will advise the job coordinator that you have completed works onsite and the job is now ready for Quality Assurance (QA).

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10	A draft invoice has been created in the *Assets* tab of the job. Next step - Please refer to the Work Instruction – **CW BBS Work Instruction – Submit an invoice (trade)**	OVERVIEW ACTIVITIES COMMUNICATIONS **ASSETS**	OVERVIEW ACTIVITIES COMMUNICATIONS **ASSETS**

ⓘ **Note**: You will be able to submit your draft invoice for repairs completed but this will not be submitted for payment until QA has been approved by the job coordinator.
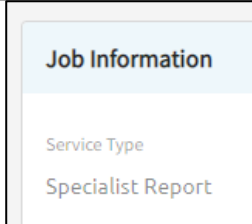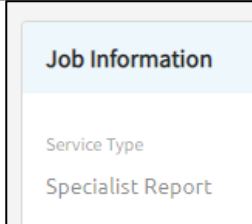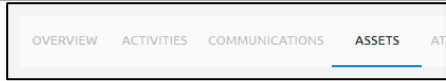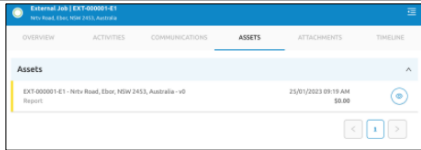
B. Step by step – Make safe report

#	Step Instruction	Desktop Image	Mobile Image
1	Every make safe job completed for Bay Building Group requires a Completion Report and Invoice submitted as soon as works are completed. A make Safe job is noted in the allocated job under the *Job Information* section in the *Overview* tab as *Service Type*: *Make Safe*.	Job Information Service Type Make Safe	Job Information Service Type Make Safe
2	Open the job, click the *Assets* tab. A draft completion report (& Invoice) is ready to be completed once site has been attended.	OVERVIEW ACTIVITIES COMMUNICATIONS **ASSETS** AT	Assets
3	Click the *eye* icon next to the report to open the report.	👁	👁
4	Complete steps 2-9 as above in section A.		

ⓘ **Note**: If you have been asked to provide a repair or restoration quote as part of your attendance, please upload these as an attachment ***prior*** to submission. Please see work instructions below - Step by step – Upload additional attachments to jobs (if required)
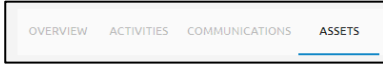
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5	For a Make Safe job, you must ensure that the invoice is submitted for approval to progress the job status to *Complete Pending QA*. Next step - Please refer to the Work Instruction – **CW BBS Work Instruction – Submit an invoice (trade)**		
ⓘ	**Note**: Once the make safe invoice and report have been submitted, the status of the job will change to 'Complete Pending QA'. This will advise the job coordinator that you have completed the make safe works onsite and the job is now ready for Quality Assurance (QA).		
6	Once QA is approved by the job coordinator, your invoice will be automatically submitted for payment.		

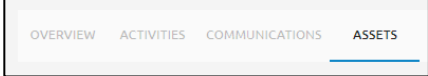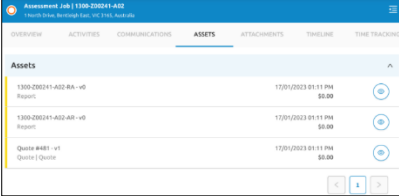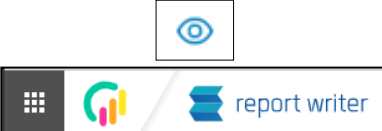### C. Step by step – Specialist report
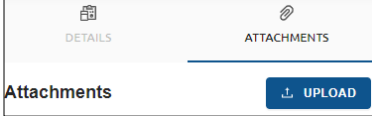
#	Step Instruction	Desktop Image	Mobile Image
1	A specialist report request is noted in the allocated job under the *Job Information* section in the *Overview* tab as *Service Type*: *Specialist Report*.		
2	Open the job, click the *Assets* tab. A draft completion report (& Invoice) is ready to be completed once site has been attended.		
3	Click the *eye* icon next to the report to open the report.		
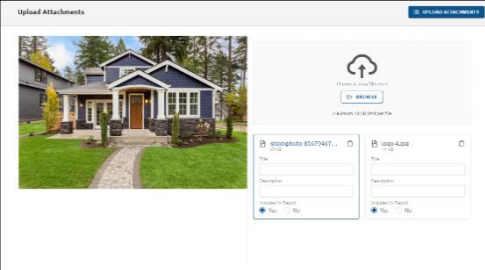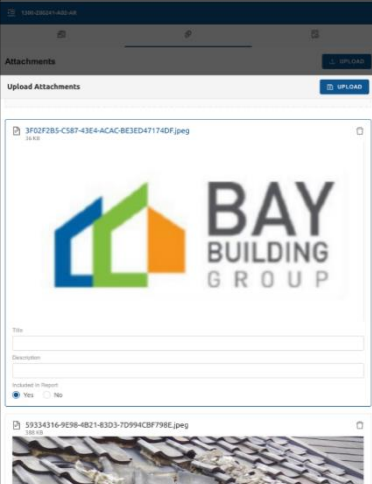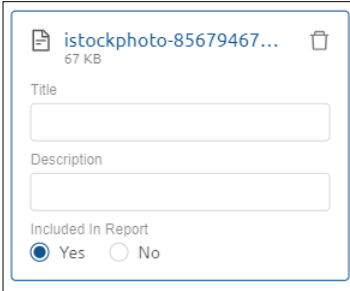
4	Complete steps 2-9 as above in section A.		
5	A draft invoice has been created in the *Assets* tab of the job. Next step - Please refer to the Work Instruction – **_CW BBS Work Instruction – Submit an invoice (trade)_**	OVERVIEW ACTIVITIES COMMUNICATIONS **ASSETS**	OVERVIEW ACTIVITIES COMMUNICATIONS **ASSETS**

> ⓘ **Note**: You will be able to submit your draft invoice for the specialist report completed but this will not be submitted for payment until QA has been approved by the estimator / repair coordinator / supervisor.

D. Step by step – Assessment report

| #	Step Instruction	Desktop Image	Mobile Image
1	In the relevant job, click *Assets* tab to view the auto created draft reports ready to be completed.	OVERVIEW ACTIVITIES COMMUNICATIONS **ASSETS**	
2	Click the *eye* icon next on the report you want to complete. A new page will open in *report writer.*	👁 report writer	👁
3	Start by uploading attachments / photos to the report. Click *Attachments* in the right-hand panel and then click on *Upload*.	DETAILS ATTACHMENTS Attachments ⬆ UPLOAD	

4	A new *Upload Attachments* pop-up will appear on your screen. Bulk add photos by choosing or dragging files. This should include pre-start and completion photos.		
5	Select each uploaded image to add details like *Title & Description* in the information box. **TIP:** With multiple uploads, select the information box, which will be highlighted with a blue border, to view the related photo in the right panel of the pop-up.		
6	Once all completed, click *Upload Attachments* (save icon), then click *Ok.* These can now be selected as you navigate the report.		

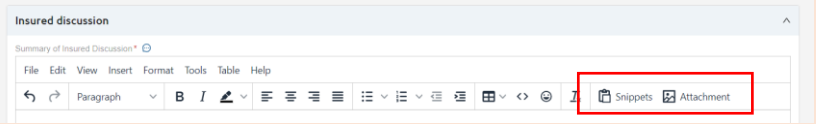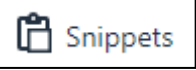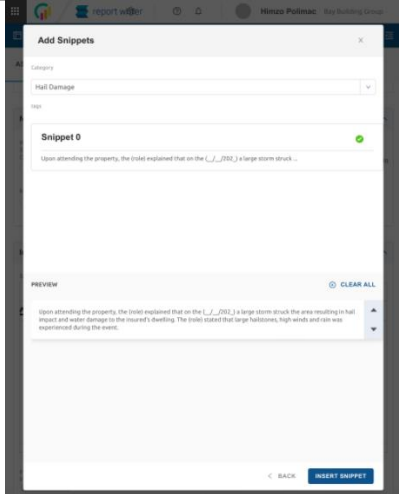| 7	Back on the report writer page, fill out all the report details.		
	TIP: Grey bordered fields should be updated and fields with a red asterix '*' are compulsory. Fields with fixed choices have a dropdown arrow to the right. Date selections have a calendar symbol in the field.		
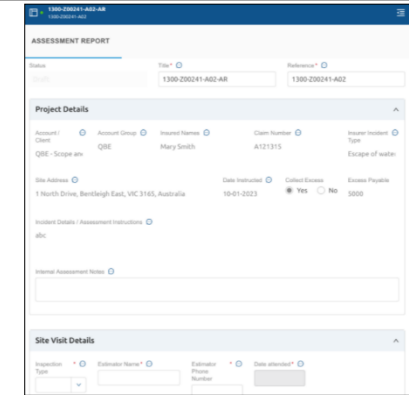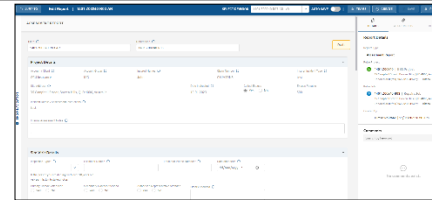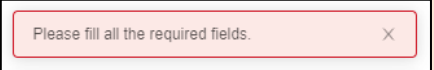
ⓘ **Please note:**

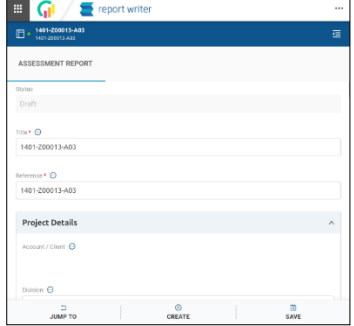- If a make safe is identified on site. Please contact the office by telephone and send an email for the BBG Team to action.
- Any risks identified will need to be highlighted in the risk assessment report and the office will need to be notified so they can follow up and action as required.

ⓘ **Note:** If a further specialist report is required, this request will need to be emailed to the BBG team to be allocate as required and noted within your report under the "Conclusion field".
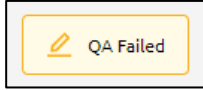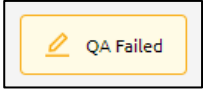
8	*Snippets* have been created to assist with report writing paragraphs. Select *Snippets.* A new *Add Snippets* pop up will appear on screen. Review library from the available categories. **TIP:** If you are unable to see the snippets icon, please check your page width.		
9	Select the appropriate *Snippet* category from the left panel and select the snippet (green tick).		
10	*Insert Snippet* on the bottom right-hand side of the pop up.		
11	Once all fields have been filled as required, click *Publish* at the top right-hand side of the page. In Mobile: Bottom right of screen. **TIP:** If a required field is not completed, an error will display:		

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	SHOW NAVIGATION	Click on the arrow in 'Show Navigation Panel' on the left-hand side to view where the missing fields are. These will be bordered in red and noted with 'This field is required'.
12	Select *Jump To* to exit the report and navigate back to the job.	⤺ JUMP TO

ⓘ	**Note**: For an assessment job you will need to complete assessment and risk assessment report.

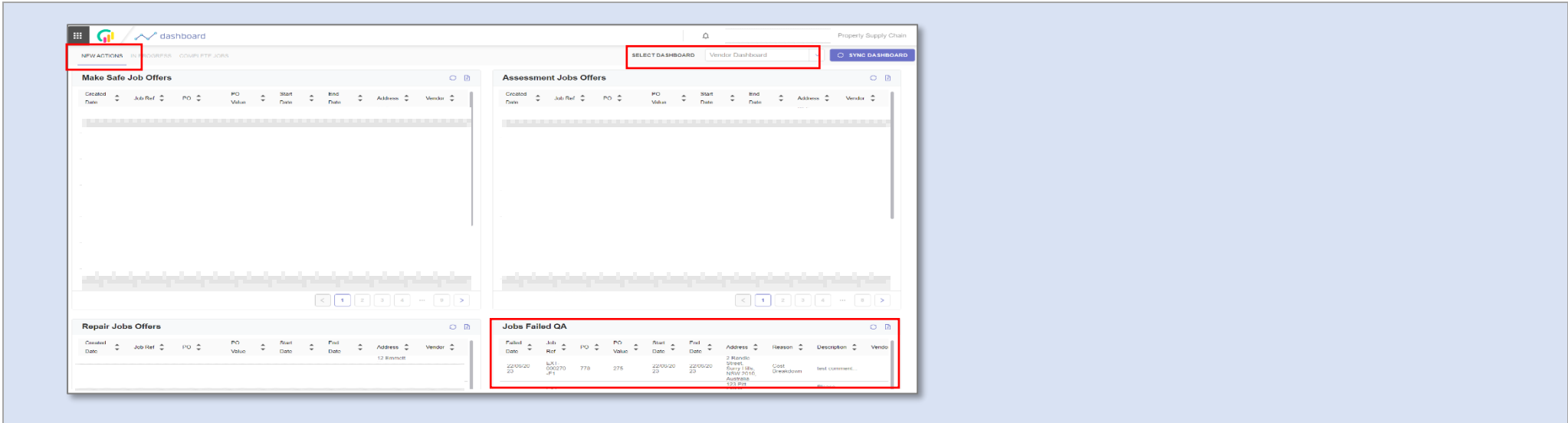### E. Step by step – Resubmit a report & / or quote at 'QA Failed' status
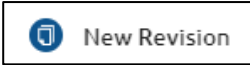
#	Step Instruction	Desktop Image	Mobile Image
1	If works complete have failed QA, you will be notified by your job coordinator. The status of your job will appear as 'QA Failed'.	✎ QA Failed	✎ QA Failed

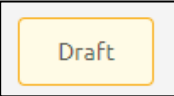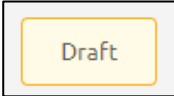|	
ⓘ	**Note**: You will be able to submit your draft invoice for the specialist report (& quote if required) completed but this will not be submitted for payment until QA has been approved by the estimator / repair coordinator / supervisor.

ⓘ	**Note**: This is also visible on your *Vendor Dashboard*:

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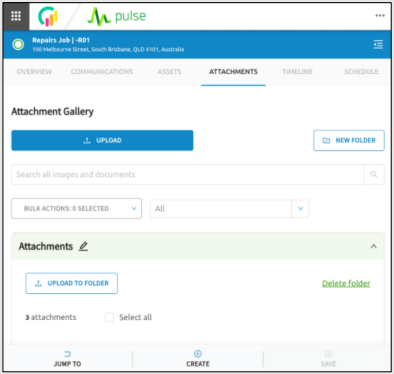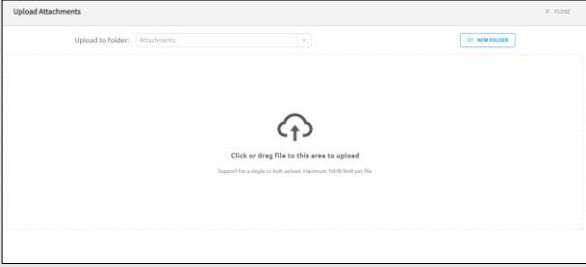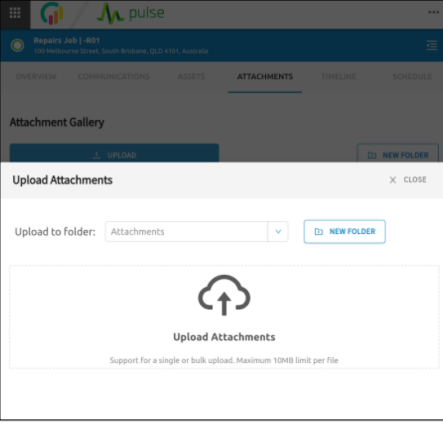
2	Once you have rectified the works as instructed by your job coordinator/estimating staff member, you will need to resubmit your report. Go to *Assets* tab and find the relevant report / quote. Click on the *eye* icon to open the report details in *report writer* (or quote details in *quotes)*		
3	A new page will open in *report writer / quotes* with the original report/ quote. Click *Create* at the top right-hand side of the page and select *New Revision* from the dropdown. In Mobile: Bottom of screen.		

4	A new version of the report / quote will be created, and the status of the report/quote will now appear as 'Draft'.	Draft	Draft
5	Update the report/quote as required including revised photos.		
6	Click *Save* once completed to save any of your changes.	SAVE	**Report Writer Actions** SAVE DRAFT PUBLISH REPORT
7	Click *Publish* on the top right-hand side of the page. In Mobile: Bottom of screen.	PUBLISH	**Report Writer Actions** SAVE DRAFT PUBLISH REPORT

ⓘ	**Note**: Once published, you can view both versions of the report / quote in report writer / quotes at any time when selecting the report /quote from the assets tab in the job and then selecting the revision from the drop down at the top of the page in report writer / quotes. The original version is followed by the suffix 'vo'.	SELECT REVISION EXT-0

8	Select *Jump to* in the top left-hand side to navigate back to the job. In Mobile: Bottom left of screen.	JUMP TO	JUMP TO

ⓘ	**Note**: Once the report / quote has been submitted, the status of the job will change to 'Complete Pending QA'. This will advise the job coordinator or estimating stuff member that you have completed the report / quote and the job is now ready for Quality Assurance (QA).

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F. Step by step – Upload additional attachments to jobs (if required)

#	Step Instruction	Desktop Image	Mobile Image
1	In a job, click on the *Attachments* tab.		
2	Select *Upload New Attachment* (Desktop) or tap *Upload* (Mobile).		
3	A new pop up will display. Drag and drop file onto the screen to upload or click on the screen to search for a file on your computer.		

4	To assist with file management, add a *Title* to each attachment. Hover over the attachment, click on *Edit details*, add information in the *Title* field. Add a *Description* if required.		