Crunchwork Trade Job Management – User Guide

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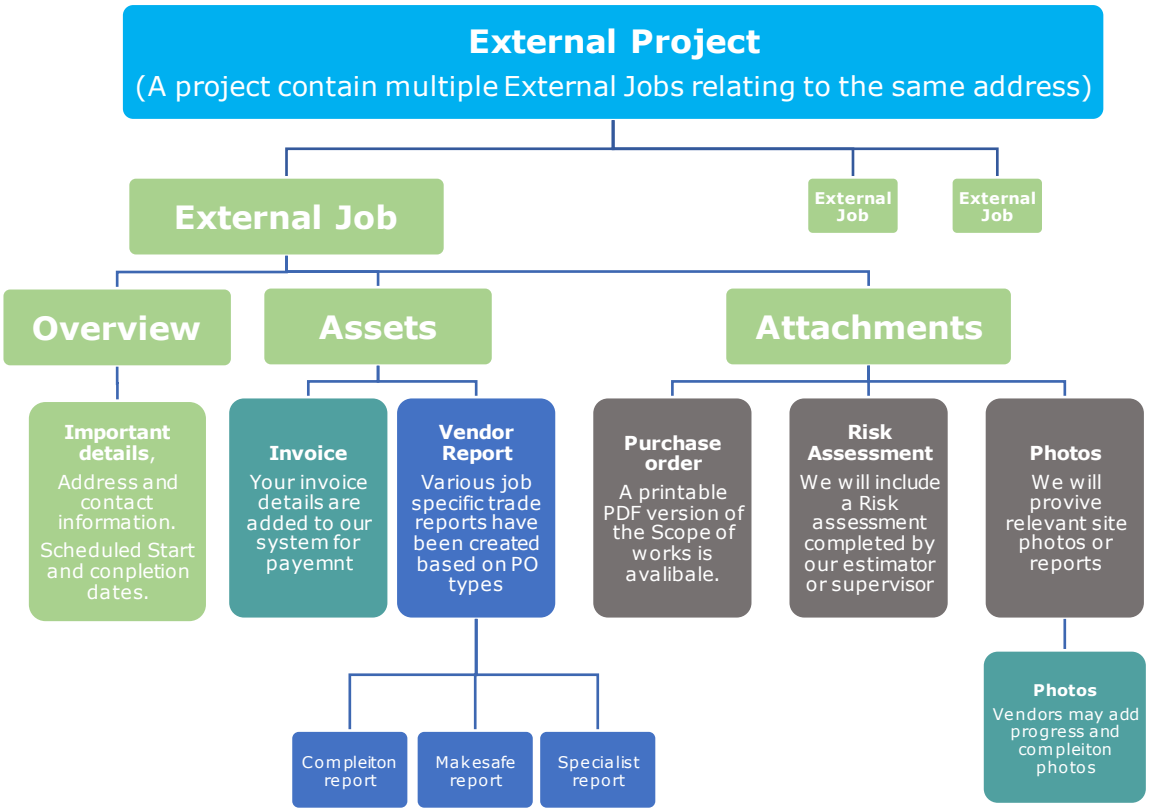
Crunchwork Structure

The architecture of Crunchwork incorporates a new concept of **Projects** and **Jobs**. This is a new way of keeping track of all your purchase orders, photos, and trade reports. Crunchwork includes several and inbuilt applications that will enable you to complete your vendor reports from site.



Crunchwork Terminology

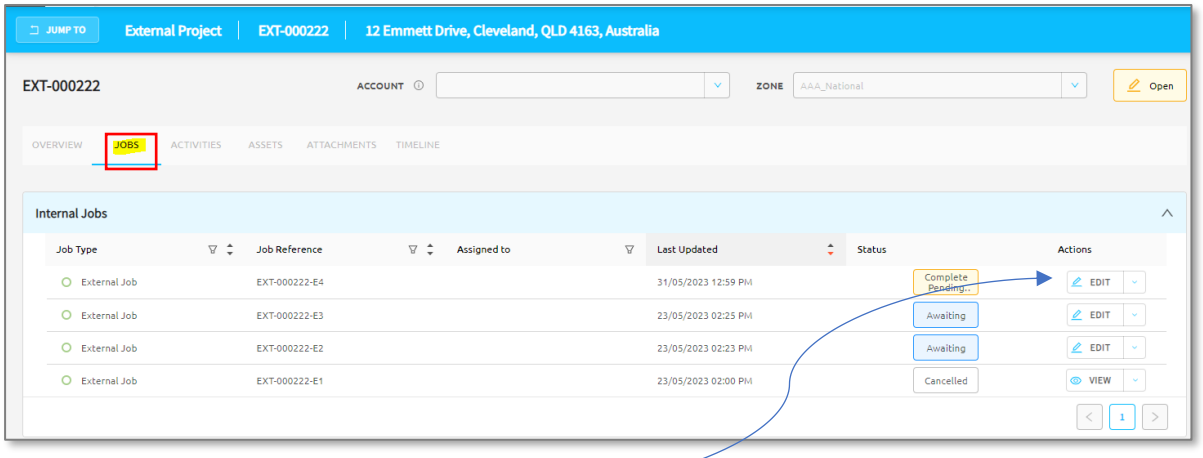
External Project	Is the overarching file that holds all the information relating to a single claim. Where you have multiple PO's for a single claim you will see multiple **External Jobs** within the **Project**.

External Job	An **External Job** (or job) holds all relevant information relating to an individual purchase order. An **External Job** has one PO and one trade invoice.
Dashboard	An application where you can monitor and manage your portfolio of works.
Vendor	Is a term used for a registered trade contractor.
Vendor report	A report to be completed by the vendor. These include completion reports and specialist reports.
Assets	An asset is an editable item, including vendor reports and your trade invoice.
Attachment	An attachment is a document or image uploaded to the **External Job**. These include, your purchase order, the risk assessment report and photos attached by BBS, and also include photos uploaded by the vendor.
Pending QA	Pending quality assurance check carried out by the Bay Building Team prior to invoice approval.

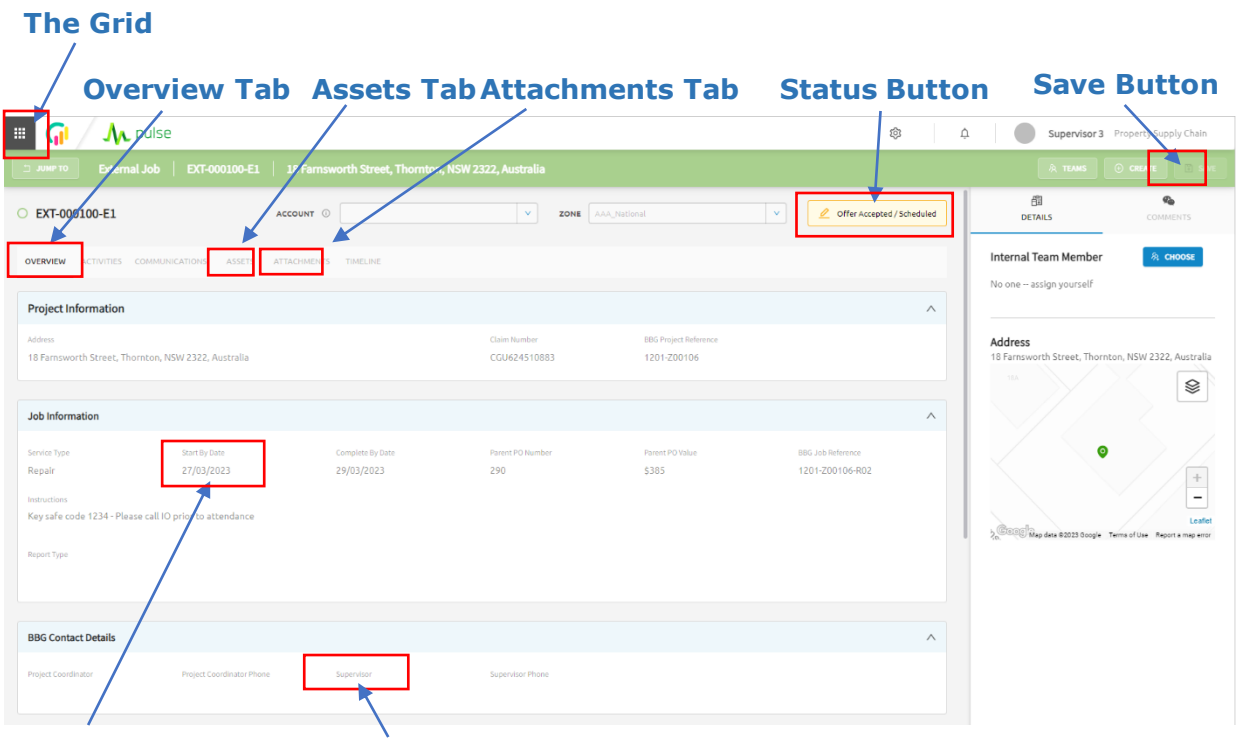
It is important to understand that above the individual unique **External Jobs** sits an **External Project**. The **Project** collates all your **External Jobs**, PO's, invoices, reports, and photos relating to a single claim. It is the intention that the vendors work directly out of the **External Job**, however the **Project** does have some benefit and function.

Although the layout of the external **Project** is very similar to the **External Job** there are some key differences:

- The **Dashboard** tracks the **External Jobs** and invoices (does not track **Project**s)
- The **Project** has a jobs tab, that has a link to all the **External Jobs** at that address.
- The **Project** assets has a link to all vendor reports and invoices across all **External Jobs** at the same address.
- The **Project** attachments holds a collection of all attachments.
- Status changes in the **Project** are system generated, and include 'New', 'Open' & 'Closed'.

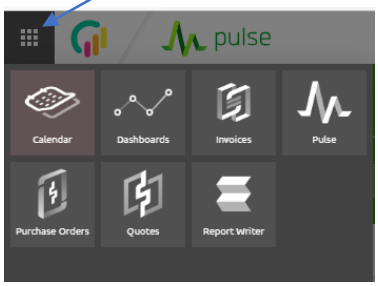


NOTE: Click the EDIT *button to access and edit active Jobs. Where a PO has been finalised or cancelled you can select* VIEW *to read only.*



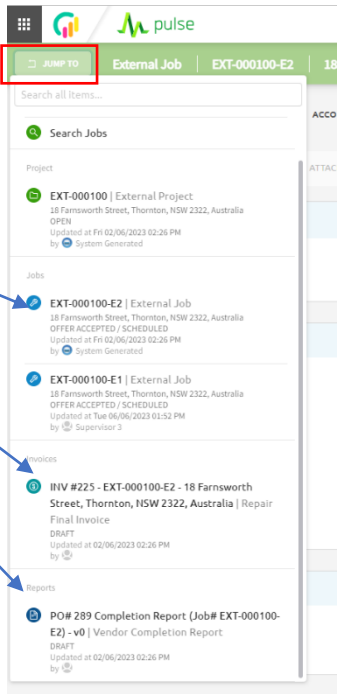
Navigation Terms

Click on **The Grid** to reveal your available modules.



When in a **Repair Job** click the **JUMP TO** button to quickly switch to related pages:

- Other jobs at the same address
- The invoice
- The report

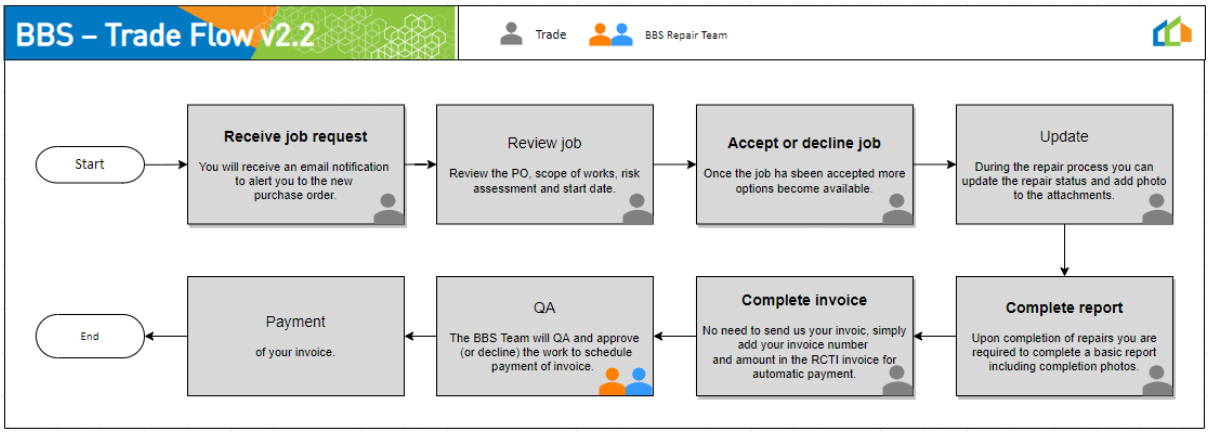


Crunchwork is built to work with best with Microsoft edge.
If you encounter issues accessing the system or application, check you are using Edge.

BAY BUILDING GROUP
BAY BUILDING SERVICES
LINX RESTORATION SERVICES
BAY BUILDING COMMERCIAL

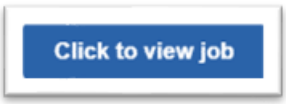
Crunchwork – Job Workflow

As a vendor you will receive a variety of jobs. All repair jobs, make safe jobs and specialist reports will follow the same basic workflow.



Receive a job request

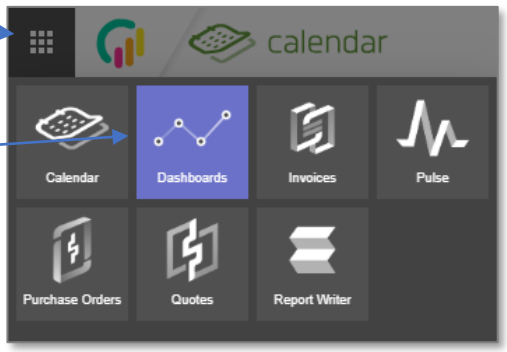
You will receive a no-reply email notification to advise you that you have received a new Job. This email will include Button that will direct you straight into the **External Job**.



Alternatively, your new jobs will also be easily identifiable in the Dashboard.

First step is to click on **The Grid** at the top left corner.

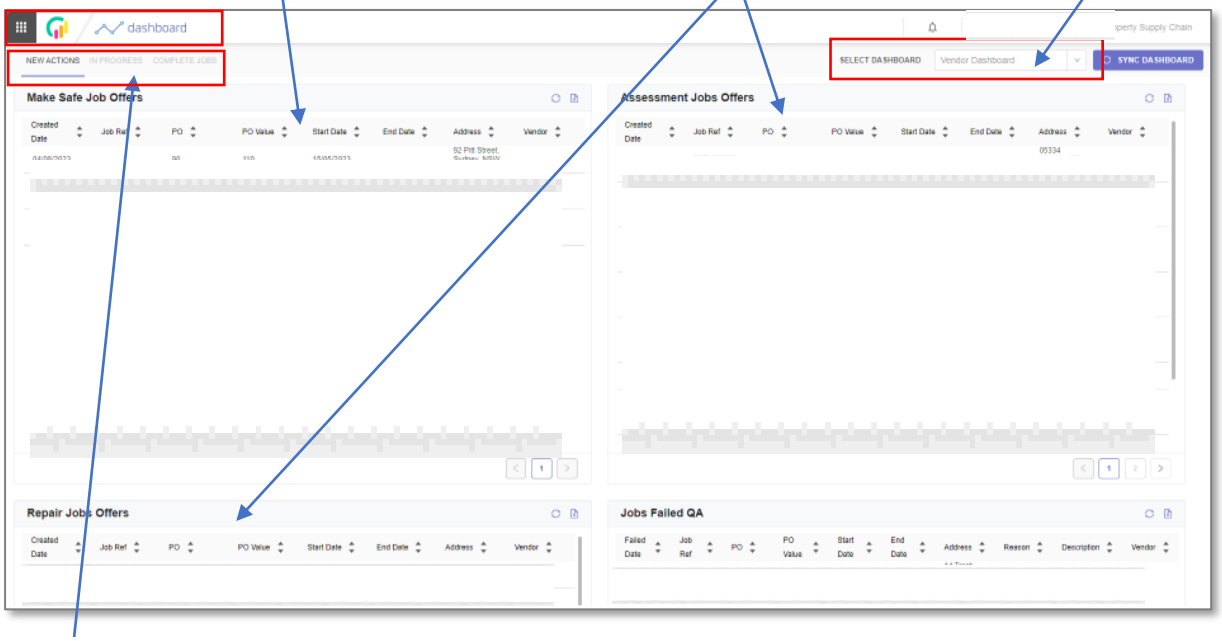
Then click the **Dashboard** the icon.



From the **Select Dashboard**, choose the 'Vendor Dashboard'.

A link to your new **Make Safe**

A link to your new **Repair & Assessment Jobs** will appear here.

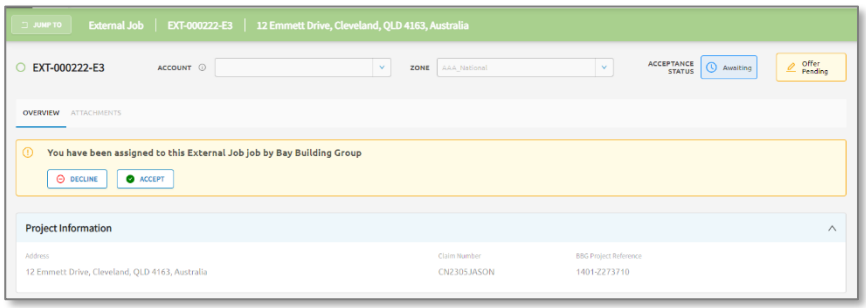


*Note: The **Dashboard** has several tabs designed to assist you to track all your various instructions through the various status. To get the best out of the **Dashboard** it is important to manage the job status correctly*.

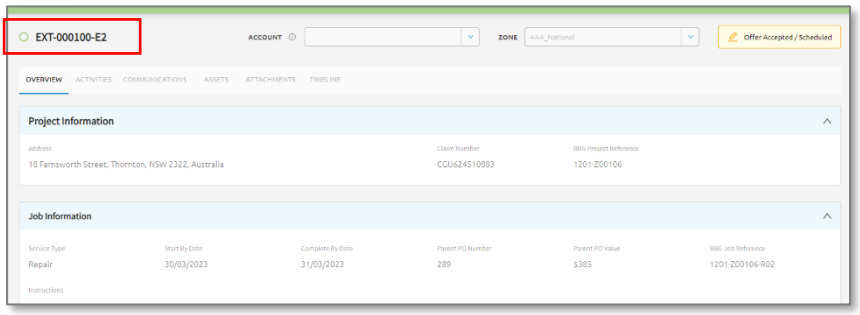
Review job

The **External Job** houses your purchase order, site reports and your invoice.

The first time you open a new **External Job** there will be as pop-up requesting that you Accept/Decline the **External Job.**



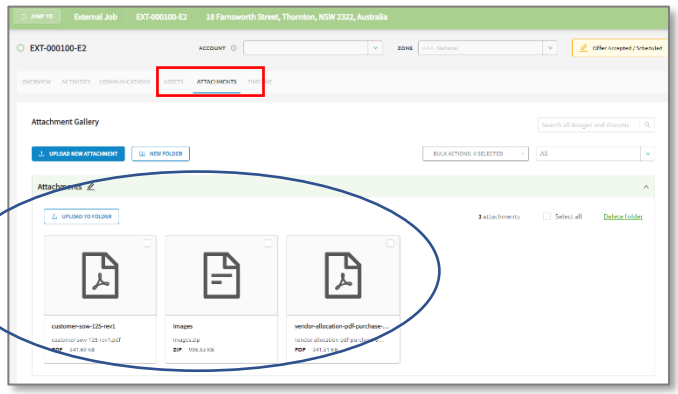
TIP: You can review the Job before you accept.



From the **Overview** tab, view the site address, scheduled start date, and PO value.

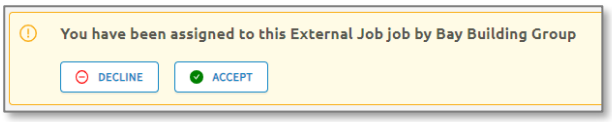
In the **Attachments** tab you can view:

- A PDF version of the purchase order and scope of works.
- A copy of the risk assessment conducted by the estimator.
- We may also include any relevant specialist reports or photos relating to the repair.

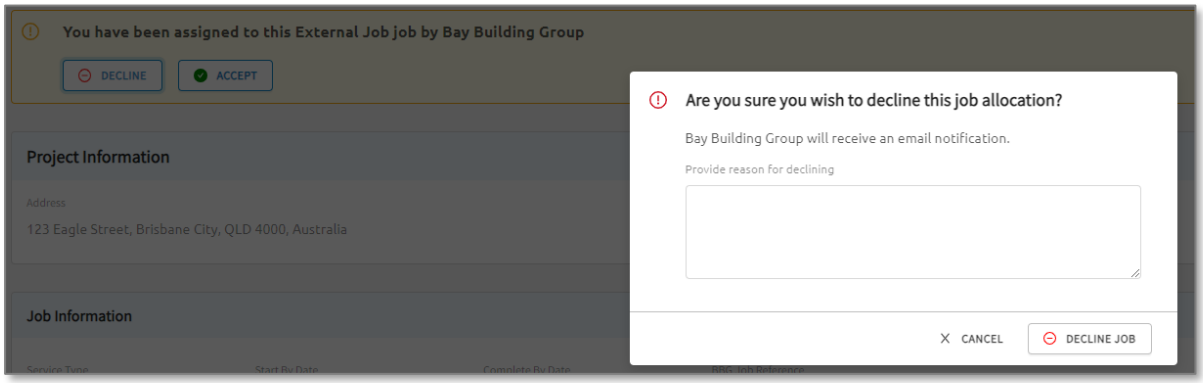


Accept or Decline the job

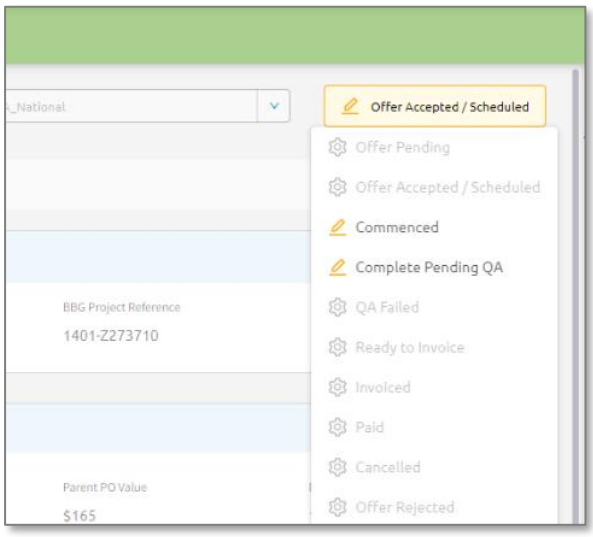
Click on 'Accept' to accept the job. The **External Job** status will automatically update, and additional fields and functions will become available and editable.



If you choose to 'Decline' the offer, you will need to add a reason. This reason will be added to the PO in the BBG portal, for the Supervisor or PC to review.



Update a job in progress

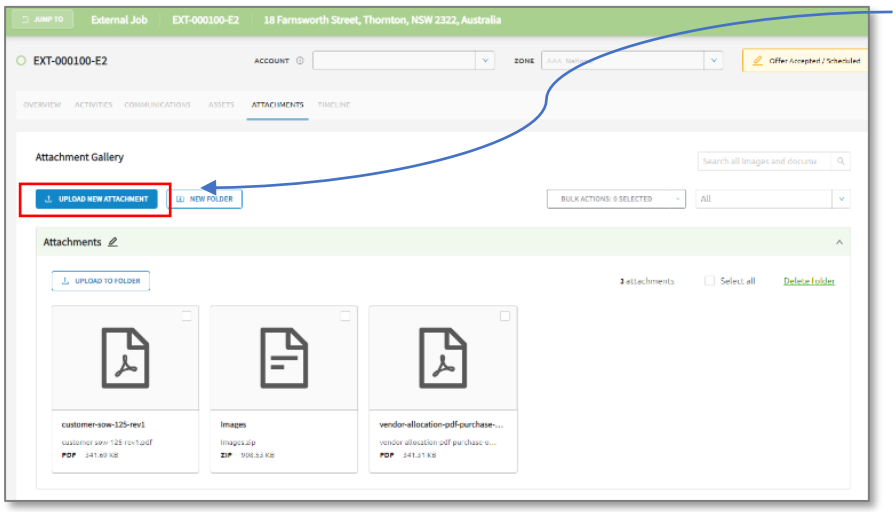


Each **External Job** has a **Status Button** seen in the top right corner of the job. Once you accept the job, the status will automatically change from **Offer Pending** to **Offer Accepted**. As you progress through the repair phase you can update the status to **Commenced.**

*TIP: Click on the **Status** button to reveal the drop down of status changes, the available changes are highlighted dark.*

TIP: Remember to save before closing the page.

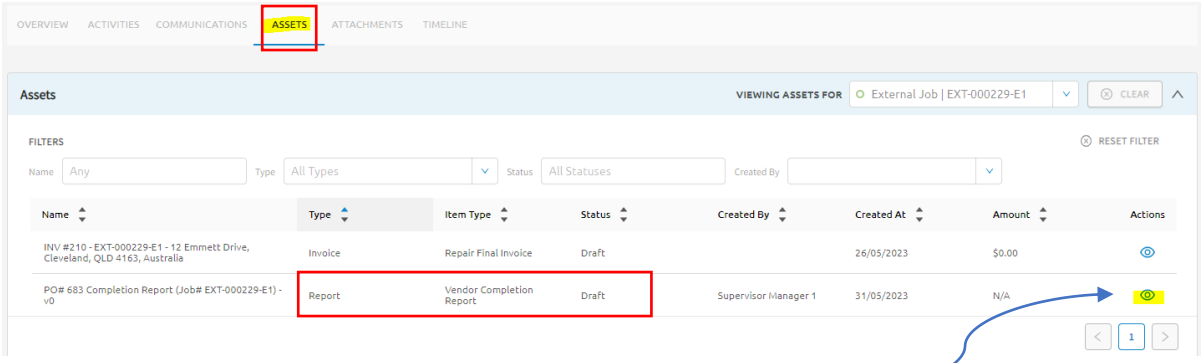
NOTE: The Job status progression will trigger a status change the related PO in the BBS Job. this will be visible by the BBS Supervisors.



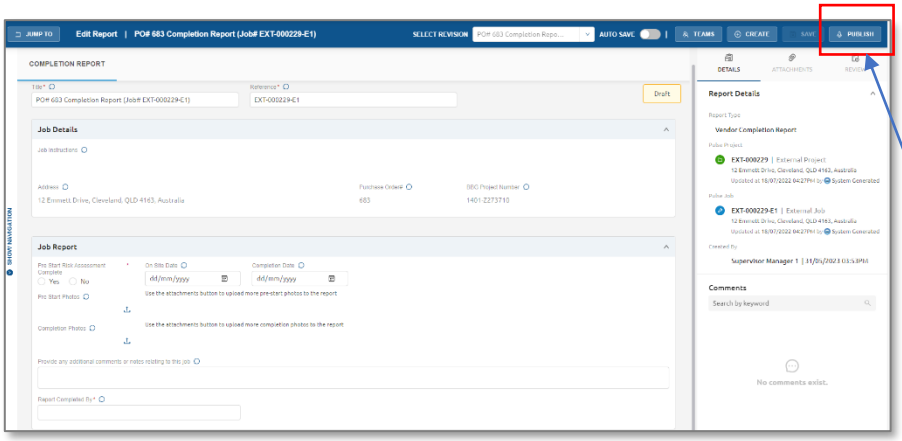
*TIP: You can upload your progress photo to the attachment via the **Upload New Attachment** button, these will not migrate to the BBS job until you submit for QA.*

Complete vendor report

Upon completion of the repairs, you will be required to complete a **Vendor Report**. The vendor report is in the **External Job**, under the **Assets Tab**.



*TIP: To open the **Report Writer**, click the **Actions Button.***



The draft vendor report will open. Complete the required information.

When complete, click **Publish** button in the top right corner.

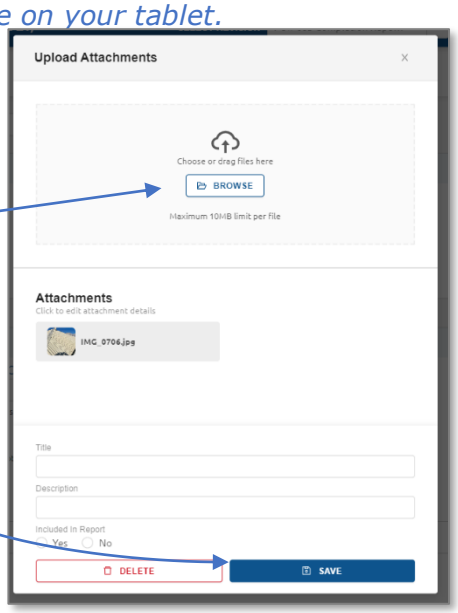
TIP:(*) indicates a Required Field.

NOTE: Crunchwork will soon be available for use on your tablet.

To add a photo to your report

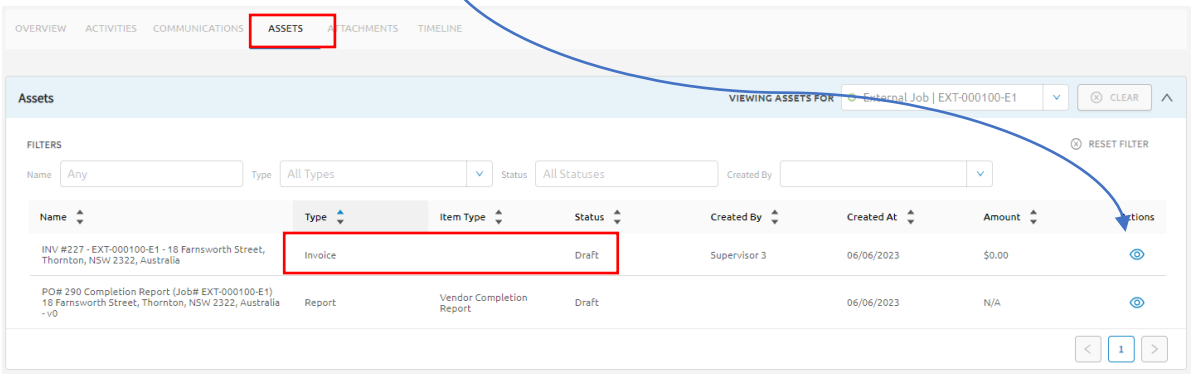
Click the Upload Button
On the report, the pop up will appear:

- Select **BROWSE**
- Select a photo from you library
- Add a title or description.
- Tick "Yes"
- **SAVE**.

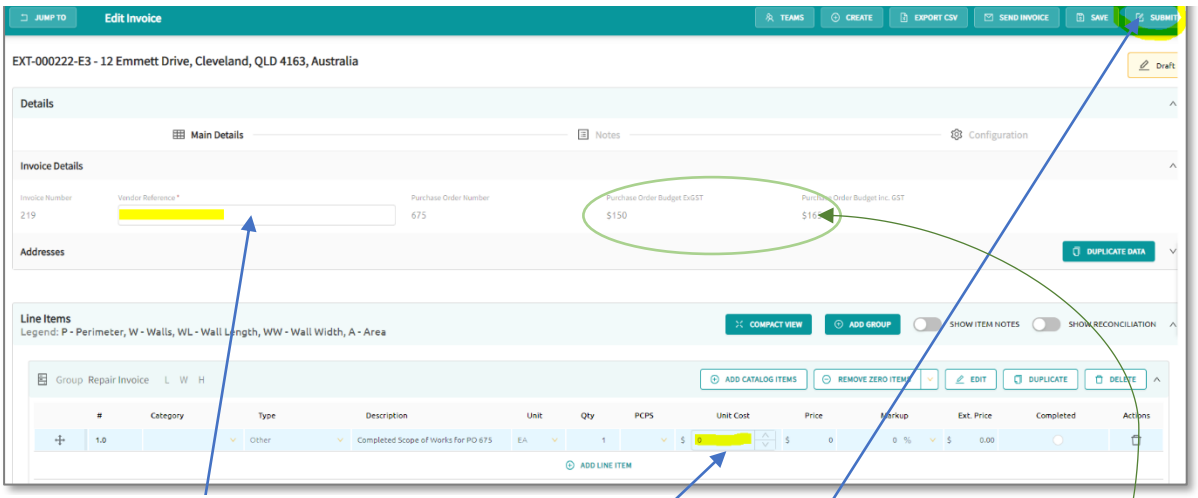


Complete vendor invoice

A draft Invoice can be found in the **External Job**, under the **Assets** Tab. To edit select the **Action** button.



The invoice module will open and the draft RCTI invoice will appear in a new screen.



1. Enter your account systems invoice number.
2. Enter the invoice amount.
3. Click the **SUBMIT** button on the top right.

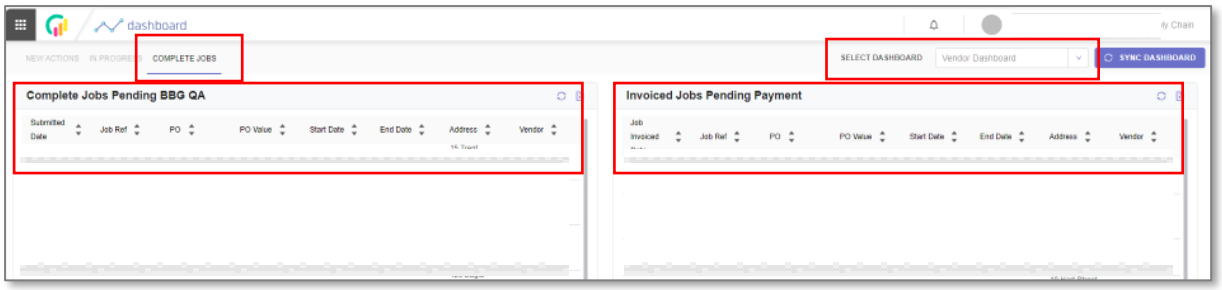
*TIP: Your PO amount is visible on the **Invoice Details**, be sure to enter the EX GST-amount.*

QA process

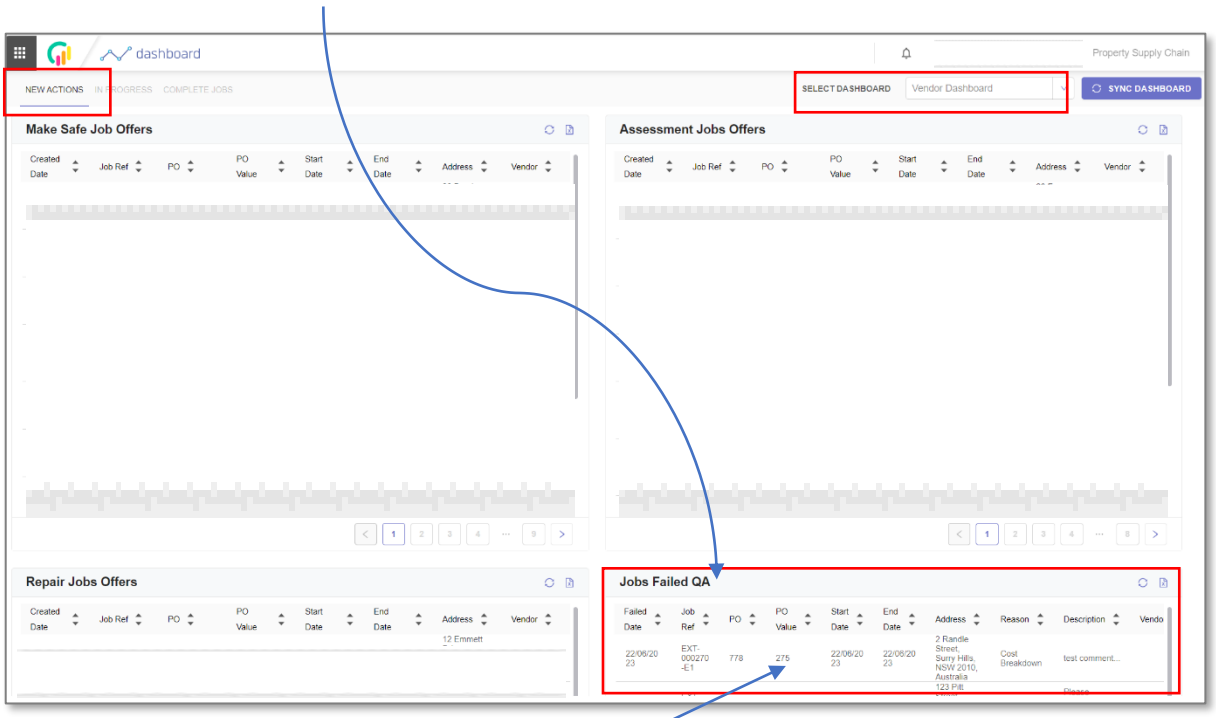
Once the **External Job** is progressed to **Complete Pending QA**, the BBS repair team will review the report and approve your invoice for Payment.

We've got it from here! The status of the job will be progressed by the BBS Team through the final status's, Invoiced and Paid. You can monitor the status via the **Dashboards**.

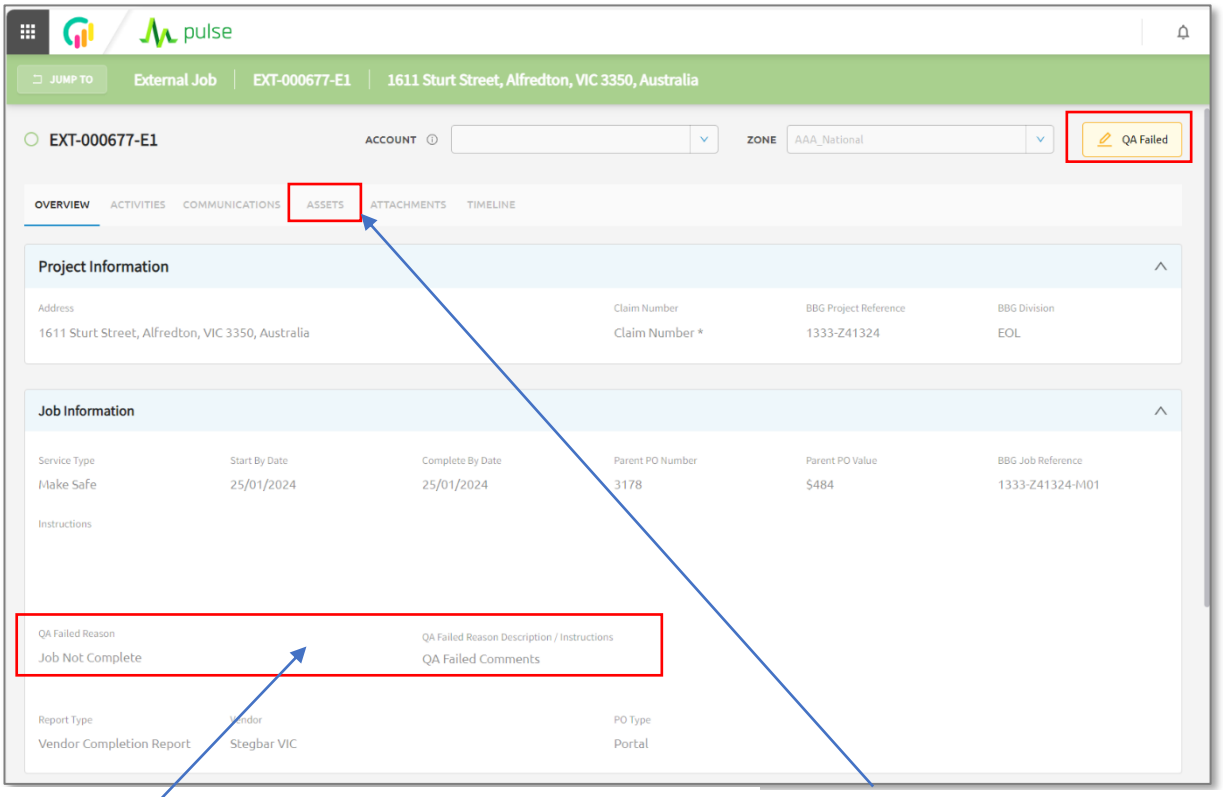
*Tip: You can follow the status of your job and invoice via the **Dashboards**.*



If QA has failed, the BBS repair team will mark the job as **QA Failed**. This will appear on your New Actions Dashboard.



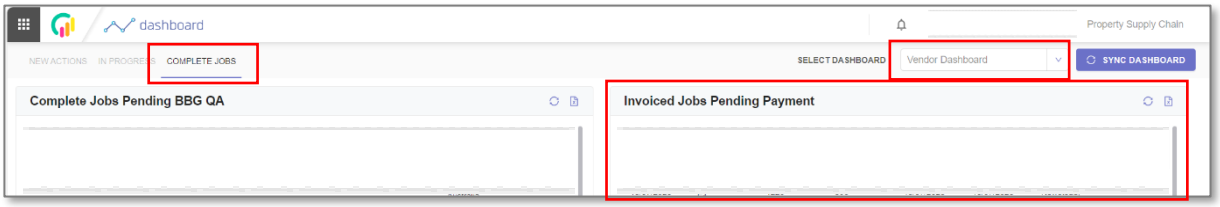
1. Select the line to access the job for review.



2. Review the reason for failure.

3. Update the revised assets.

Payment

So not to delay payment. It is important that when you have completed the repairs, complete the required report, and completed the invoice.

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