External Estimator Submission Process (Xactimate Replacement Solution)

This work instruction is for estimators and will demonstrate how to review your estimation runs, create and submit quote & / or reports in Crunchwork.
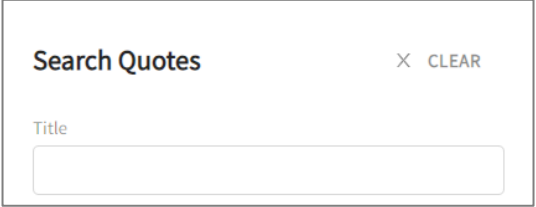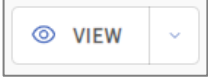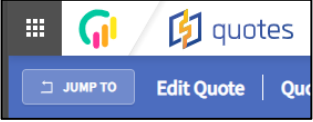
A. Step by step – Estimation Notifications

#	Step Instruction	Image
1	Open Outlook email, confirm job details (& asset url).	New Booking for Job # 1300-083037 (34 Elizabeth Street, SOUTH YARRA VIC 3141) J... testbbg@baybuilding.com.au To ○ TESTBBG; ○ Kasuma Yuda; ○ Mitrais Development Retention Policy 2 Years Delete (2 years) Expires 25/0... You have been booked to do Report And Quote for the following job. Please contact claim team if you can't perform th... Job number: 1300-083037 (34 Elizabeth Street, SOUTH YARRA VIC 3141). Received Date: 26 February 2024 2:45 PM Attendance Date: 26 February 2024 4:00 PM Request Type: Report And Quote Quote Number: 581130 Client Type: Direct Insurer Client: Auto and General Insurance Services Pty Ltd Event Type: BAU Claim Number: ABC Crunchwork Quote reference: 2572 Crunchwork Assessment Report reference: 1300-083037-Assessment Report Crunchwork Risk Assessment reference: 1300-083037-Risk Assessment
2	Open Crunchwork & Login	
3	Use the URL in the email to locate the relevant quote and reports in Crunchwork	

B. Step by step – Locate & Submit Quote in Crunchwork.

#	Step Instruction	Image
ⓘ	**Note:** As above, you will receive email notification of new estimations. This will include url links to the Crunchwork asset/s, you can use this to navigate to the quote &/or report. If you are using this, skip to **step 5** below.	
1	Open Crunchwork & Login	
2	Using the Grid on the top left-hand side, open the *Quote* module.	

| 3	Use the search panel on the left-hand side to search the **BBGConnect Reference Job number** in the *Title* field. The search results will appear in the results panel on the right-hand side	
4	Locate the relevant line item and click the *View* button.	
5	The quote module will open in the required quote. Confirm that the *Quote Details* are correct as expected. If not, please contact the office directly.	

ⓘ **Note:** *Account* displayed at the top of the page indicates the pricing used in the quote *AND IS NOT THE ACTUAL ACCOUNT*:
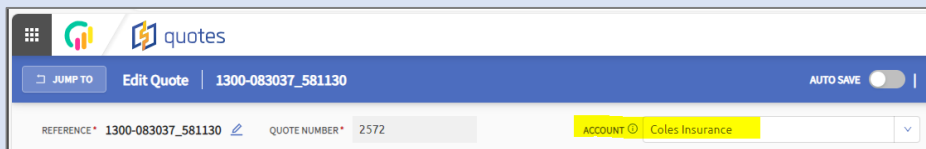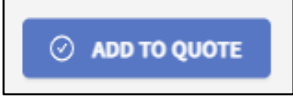

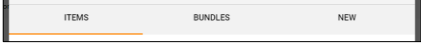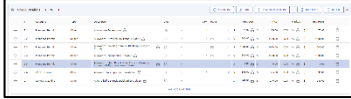The following accounts indicate the pricing selected:
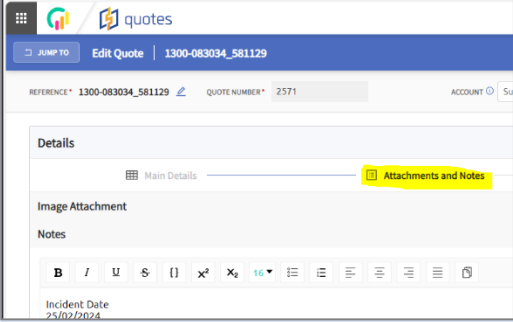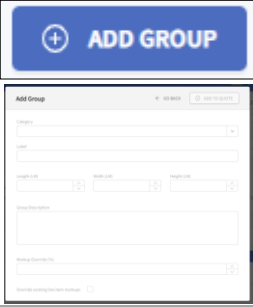
- Coles Insurance – Cost Plus Pricing
- A&G – Quoted Pricing
- Suncorp Insurance – Suncorp Pricing
- YOUi – YOUi BSA Pricing

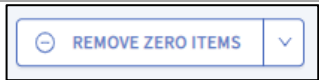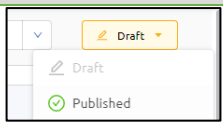To view the insurer information, use the drop down arrow to the right of the *Addresses* section:
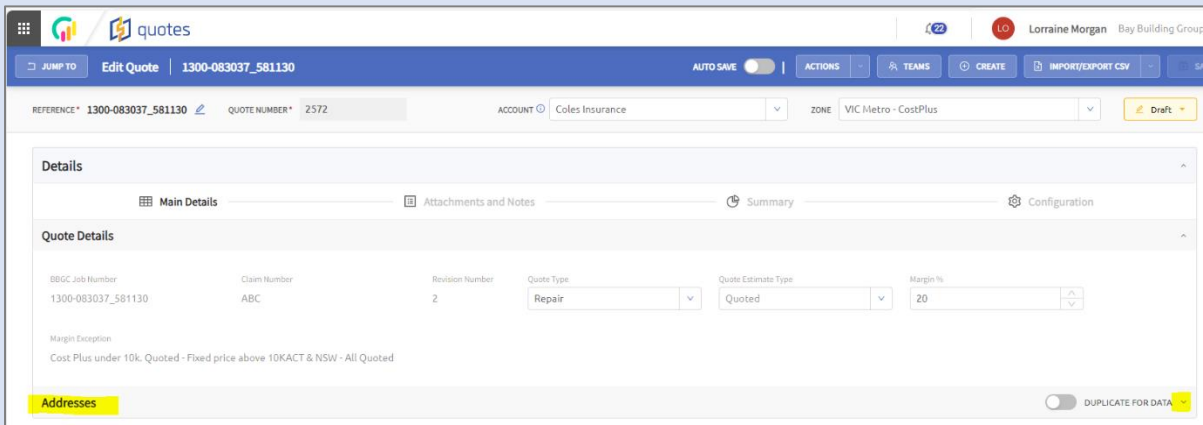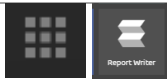
To: Insurer Details
For: Insured Details
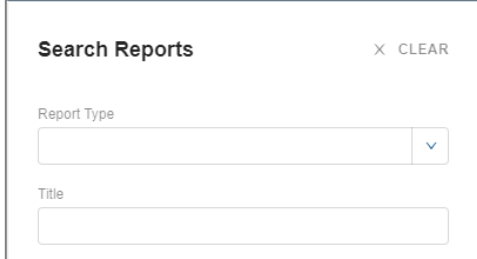

ⓘ **Note:** *Quote Type* 'Repairs' is only used for the initial assessment quote. Quote types 'Cash Settlement' are to be used for quotes where the client has asked for a separate cash settlement quote.

ⓘ	**Note:** All client instructions and job information are available in the notes section of the quote:	

|		
6	From the top right-hand side of the screen select the correct zone based off the claim address.	
7	Completing a scope: In the *Line Items* section, click *Add Group,* a new pop-up window will appear. a. From the drop down on the *Label* field, select the name of the room or area name. b. Enter the *length*, *width,* and *height* dimensions of the area.	
ⓘ	**Note:** The *Category, Group Description* and *Markup Override (%)* are not used fields. Please ignore these fields.	
7	Click on *Add to Quote* at the top right-hand side of the pop up. The newly created group will now be visible in the *Line Items* section.	
8	In the *Line Items* section, in the new *Group* created, click *Add Items.* A new pop-up window *Add Items to Group*…. will appear.	
9	At the top of the pop-up window is the option to search for *Items*, *Bundles* or create a *New* item. **Best Practice:** It is best practice to start by selecting a bundle and then making the relevant adjustments to the scope by removing / adding individual line items.	
10	Add the required *items* or *bundles*. You can use the search field and enter key words. Select and click *Add Items* to complete.	
11	Review the scope of works created and update the *quantity*, *unit* or *PCPS* for each line item if required.	

TIP: Clicking the N/A on the line item will default the line-item quantity to the group (room) measurements. If it's a m2 item, each time you click it will show you the quatity for walls, floow/ceiling etc.	N/A

#	Step Instruction	Image
11	Click on *Remove Zero Items*. This will clear any line items that have a $0 total associated.	⊖ REMOVE ZERO ITEMS ⌄
12	Review scope for preliminary items. If required create a new group labelled as 'Prelims' e.g., Supervision, Insurances, etc.	
13	Review entire scope. Once all fields have been filled as required, click *Save* to save your changes.	💾 SAVE

Best Practice: If a cash settlement or liability quote is required: • Partial – create a separate group/room in the quote using the room 'Cash Settlement'. • Full – change quote type	🎗

#	Step Instruction	Image
14	When you have filled out the quote, update the status of the quote to 'Published' by clicking the quote status button on the top right-hand side of the page and selecting 'Published' from the drop down.	✏ Draft ▾ ✏ Draft ⊘ Published

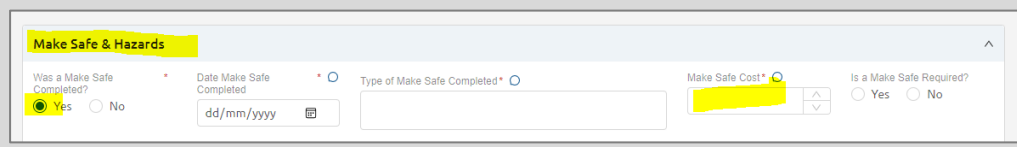|	
ⓘ	If request is **'Assessment Report & Quote'**, navigate to Step by step – Submit a Report in Crunchwork to complete the report.

C. Step by step – Submit a Report in Crunchwork.

#	Step Instruction	Image
ⓘ	**Note:** As above, you will receive email notification of new estimations. This will include url links to the Crunchwork asset, you can use this to navigate to the quote or report. If you are using this, skip to **step 5** below.	
1	Open Crunchwork & Login	
2	Using the Grid on the top left-hand side, open the *Report Writer* module.	Report Writer

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

3	Use the search panel on the left-hand side to search the BBGConnect Job number in the *Title* field. The search results will appear in the results panel on the right-hand side.	
4	Locate the relevant report line item and click the *Edit* button	
5	The *Report Writer* module will open in the required quote. Review the *Project Details* for insured & claim details. If unsure, please contact the office directly	

ⓘ **Note:** All client instructions and job information are available in the *Project Details* section of the Report.
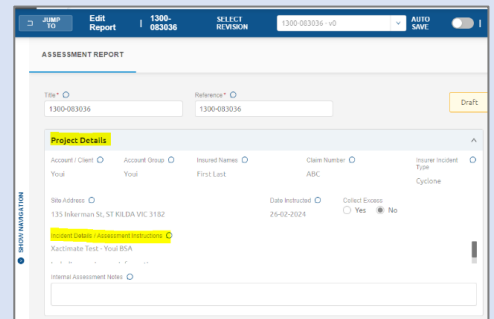
CLIENT OPUS Best Practice: If a Make Safe is completed, it will be noted in the *Project Details*. In the *Make Safe & Hazards* section of the report include a make safe estimation cost of *$1,000.00* in your report.
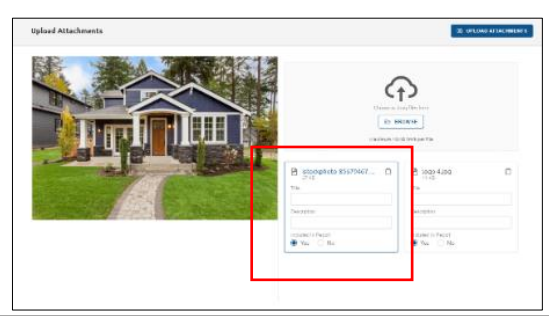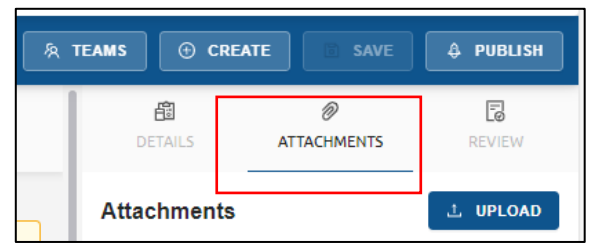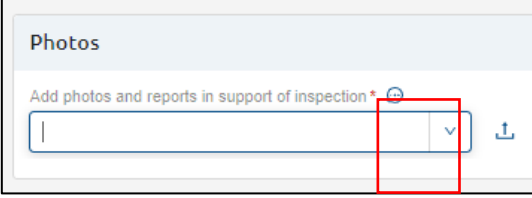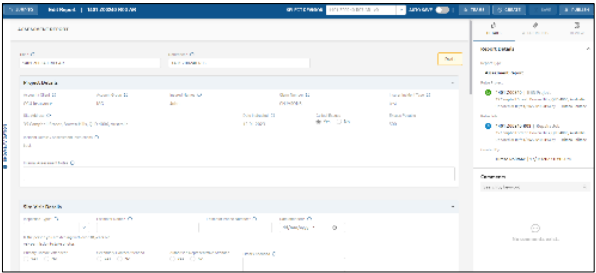

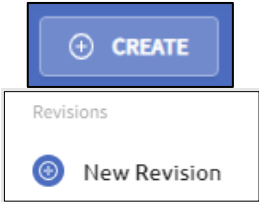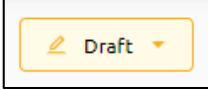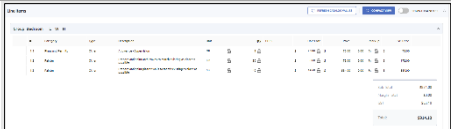| 6	Start by uploading photos to the report. Click *Attachments* tab in the right-hand panel and then click on *Upload* Button The *Upload Attachments* window will appear. Upload photos to the report by selecting the Browse button to take photos or add Bulk saved photos. Proceed to label all photos and select *Upload Attachments* button when complete.	

	TIP: Ensure the 'include in report' flag is Yes.	
7	Insert one photo into the mandatory locations by selecting the dropdown box, Select one of the previously uploaded photos. **TIP:** all uploaded photos will appear at the bottom of the report when it is published.	
8	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 make safe is identified on site, please contact the office by telephone and send an email for claims to action.
- Any risks identified will need to be highlighted to the office and in the risk assessment report as information captured in the assessment report goes to the insurer only.
- If escalated claims noted, please advise the office.

ⓘ **Note:** If a specialist report is required:

- Contact the office to allocate PO to specialist trade.

If awaiting the return of a specialist report to complete assessment:
- Click '*Save*' so you can return to complete once trade report received.
- Select '*Jump To*' to exit the report.

Once specialist report received:
- Review trade report.
- Update assessment report details.
- Submit as per below.

| 9 | *Snippets* have been created to assist with report writing paragraphs. Select *Snippets.* A new *Add Snippets* pop up will appear on screen. Estimators are expected to utilise where possible. Review library from the available categories. | |

10	Select the appropriate *Snippet* category from the left panel and select the snippet (green tick).	
11	*Insert Snippet* on the bottom right-hand side of the pop up.	INSERT SNIPPET
12	Once all fields have been filled as required, click *Publish* at the top right-hand side of the page. **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'.	△ PUBLISH

ⓘ **Note:** A risk assessment report is required on every job. Please complete as allocated.

D. Step by step – Resubmit a Quote / Report in Crunchwork.

#	Step Instruction	Image
ⓘ	**Note:** This process is if requested by claims, via phone or email, prior to submission to client (or quote import to BBGConnect). If the quote has already been uploaded, the quote will be cancelled and a draft new version created. The Report will also be drafted but with all original details.	
1	In the quote / report click *Create* at the top right-hand side of the page and then select *New Revision* from the dropdown options.	⊕ CREATE Revisions ⊕ New Revision
2	Status of the quote / report will now appear as 'Draft'.	✎ Draft ▾
3	Adjust the line items / make changes as required.	

4	Click *Save* once completed to save any of your changes.	
5	Update the asset status from draft by selecting 'Published' from the drop down.	