Payments Training Manual

Contents

Login procedure

Open any browser and navigate to Payments via the toolbox or through this link: https://hutchinson-test.appiancloud.com/suite/sites/payments

Enter your full hutchies email (firstname.lastname@hutchinsonbuilders.com.au) and current computer login password to sign in.
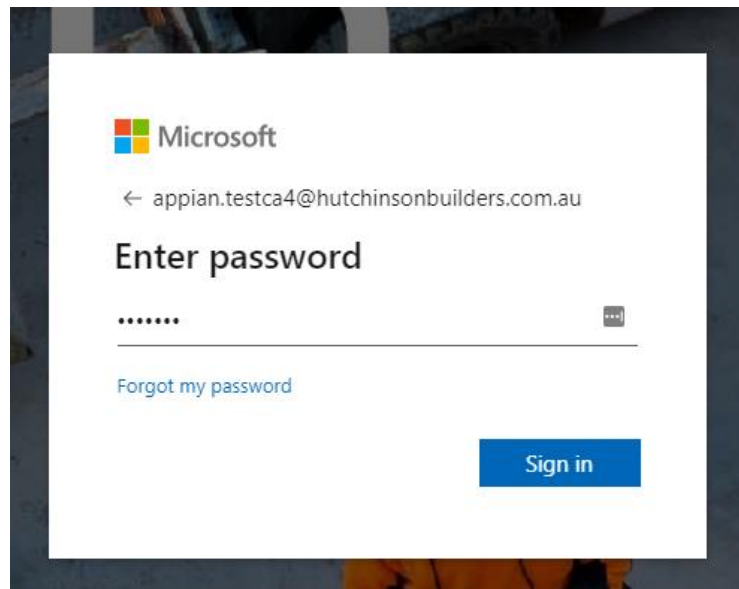
Interface information

The landing page will appear in the below format. When navigating the site, avoid using the browser forward and back buttons.

Use the navigation pane at the top to switch between pages.

The INVOICES page houses invoices, claims and retention releases.

The SEARCH page provides various filters to search for all invoices/claims.

The TOOLS page grants users the ability to manage their downloaded files and delegates.

The SUBCONTRACTS page grants users the ability to manage subcontracts.

The REPORTS page will generate reports of unprocessed invoices/claims per team.

Invoices

The Invoices page reports all items which have been assigned to the user. (i.e. invoices/progress claims/retention release)

The referencing below explains:

1) Dynamic filters displayed based on user's assigned items. (Assigned, Returned to CA, Cadet Requested Approval)

2) Search Filters

3) Click Review in the action column to open the invoice/claim

4) The document type. (Invoice, Claim, Retention, Uncategorised)

5) The status of the item. (More details in the search section)

6) The amount of business days left to respond with a payment schedule.

Processing an invoice

1) Click Review in the action column.

| 1 | Review | 000304 | - | EVO33 | EVO 1 MAINTENANCE | Appian TestCA4 | 1,000.00 | 07/07/2022 | 11/07/2022 | Assigned | 10 |

2) Click [Invoice ⦿] to categorise the type.

« »   Left to expand and right to hide the pdf.

⧉   Open the pdf in a new tab.

REASSIGN   Reassign the invoice. (Go to the reassigning section for more details.)

Review - CH30368941

INVOICE DETAILS

Type *

[Invoice ○]   [Claim ○]   [Retention ○]

Vendor
EAR13 - EARTHFLEET

Invoice Date	Scan Date	Due Date
07/07/2022	07/07/2022	31/07/2022

Total Exc. GST	GST	Total Inc. GST
$8,764.50	$876.45	$9,640.95

Vendor ABN	PO
77114613464	–

EARTHFLEET PTY. LTD.
ABN 77 114 613 464
ACN 114 613 464
TRADING AS

EARTHFLEET

FOR EARTHMOVING
PO Box 138
Runaway Bay QLD 4216
☎ (07) 555 23 777
(07) 555 23 778
http://www.earthfleet.com
info@earthfleet.com

J. HUTCHINSON PTY LTD
T/as HUTCHINSON BUILDERS
LOCKED BAG 3002
TOOWONG DC QLD 4066

Tax Invoice

| Invoice number | 30368941 |
| Date issued | 31 Dec 2021 |

JOB DELIVERY ADDRESS O/N 5024820 - LAKEVIEW BL MERMAID WATERS

Account number   85 HUTBU

				Summary of charges		
Date	Docket	Driver	Quantity	Service		Cost
06/12/2021	352760	SJB	10.5	HRS 5T EXCAVATOR		$1092.00
06/12/2021	349190	TD	1.0	FLOAT 16T EXCAVATOR		$420.00
06/12/2021	349190	TD	10.0	16T EXCAVATOR		$1300.00
06/12/2021	349189	TD	11.0	TRUCK HIRE		$957.00
06/12/2021	351050	VJ	10.5	TRUCK HIRE		$913.50
07/12/2021	352761	SJB	9.0	HRS 5T EXCAVATOR		$936.00
10/12/2021	352765	SJB	7.0	HRS 5T EXCAVATOR		$728.00
10/12/2021	345095	TD	1.0	FLOAT 16T EXCAVATOR		$420.00
10/12/2021	345095	TD	6.0	16T EXCAVATOR		$780.00
10/12/2021	345096	TD	7.0	TRUCK HIRE		$609.00
10/12/2021	345096	TD	7.0	TRUCK HIRE		$609.00

| | GST | $876.45 |
| | Total | $9640.95 |

DRIVER NOTES
- 352760 - 6am-4pm -1/2 break +1 travel. Load & stockpile sand for backfill. Basement wall.
- 349190 - 6.30am-4.30pm. Load tippers.
- 349189 - 6.30am-4.30pm +1 travel. Move sand around site.
- 351050 - 6.30am-4pm +1 travel. Carting sand on site.
- 352761 - 6am-3pm -1/2 break +1/2 travel. Backfill basement wall. Create platform for electrical
- 352765 - 6am-12.30pm -1/2 break +1 travel. Backfill basement wall as directed.
- 345095 - 6am-12om. Load sand onto tippers.

CANCEL   REASSIGN   SAVE   APPROVE

3) Enter the job number, cost code, cost type and amount for the invoice.

   ↓   Automatically populates the invoice line item based on historical data.

   ⊕ Add Invoice Line   Split the cost across multiple lines.

   ADD RFC   Add an RFC if needed. (Go to the RFC section for more details.)

4) Click approve.

Review - 126119

RFC - Request for Credit

1) Click [ADD RFC] on the invoice processing page if there is a disagreement with the invoice total.

   a) The image below shows [REMOVE RFC] because an RFC line item has been added

2) The previous job number and cost code will default.

   ⊕ Add RFC Line   Add additional RFC lines if necessary.

   🔍 Preview RFC Document Preview the RFC document.

3) Detailed commentary is mandatory.

4) Approve.

Review - 73786311

Claims

Processing a claim

1) Click Review in the action column.

| 1 | Review | 000304 | - | EVO33 | EVO 1 MAINTENANCE | Appian TestCA4 | 1,000.00 | 07/07/2022 | 11/07/2022 | Assigned | **10** |

2) Click [Claim ⦿] to categorise the type.

« » Left to expand and right to hide the pdf.

🗗 Open the pdf in a new tab.

REASSIGN Reassign the claim. (Go to the reassigning section for more details.)

A list of existing subcontracts is shown for the vendor across all jobs the user has access to.

3) Create a new claim for an existing subcontract.

Create a new subcontract if subcontract does not exist. (Go to the Creating Subcontracts section for more details.)

✛	Create a new claim.
⊞ CREATE SUBCONTRACT	Create a subcontract.
🔭	View a summary of the subcontract and claim history.

Review - 3974

INVOICE DETAILS

Type *

Invoice	◯	Claim	⦿	Retention	◯

Vendor
IKO01 - IKON DOORS (QLD) PTY LTD

Invoice Date	**Scan Date**	**Due Date**
07/07/2022	07/07/2022	31/08/2022
Total Exc. GST	**GST**	**Total Inc. GST**
$32,017.00	$3,201.70	$35,218.70
Vendor ABN	**PO**	
38120403536	222222	

⊞ CREATE SUBCONTRACT

Subcontract for Vendor IKO01 IKON DOORS (QLD) PTY LTD

SL	Name	Job Number	Description			
5026035	IKON DOORS (QLD) PTY LTD	26407	17.10 Ikon Contract	🔭	✛	⊘
5040002	IKON DOORS (QLD) PTY LTD	26400	31 DUNCAN STREET	🔭	✛	⊘
1515457	IKON DOORS (QLD) PTY LTD	26191	16.10 Ikon Doors Contract	3	✛	⊘
1448564	IKON DOORS (QLD) PTY LTD	26164	METRO ARTS	🔭	✛	⊘
5010488	IKON DOORS (QLD) PTY LTD	26050	WEST VILLAGE STAGE 3	🔭	✛	⊘
1411226	IKON DOORS (QLD) PTY LTD	26042	SKYTOWER L5 CHILDCARE CENTRE	🔭	✛	⊘
1420960	IKON DOORS (QLD) PTY LTD	25985	Fire Doors and Frames	🔭	✛	⊘
1349810	IKON DOORS (QLD) PTY LTD	25701	Metal Frames and Doors	🔭	✛	⊘
1370573	IKON DOORS (QLD) PTY LTD	25701	DESTINATION GOLD COAST CONSORTIUM TOWER 1	🔭	✛	⊘
5012984	IKON DOORS (QLD) PTY LTD	25701	DESTINATION GOLD COAST CONSORTIUM TOWER 1	🔭	✛	⊘

‹ **1 – 10** of 18 ›

CANCEL REASSIGN   SAVE APPROVE

4) Enter the Claim Amount for each of the line items.

The Certified amount will match the claimed amount on initial entry. You can override the certified amount if you are short paying the claim. Short payments will require a narration in the comment box. Retention amounts will be calculated from the certified amount entered.

📄   Display the pdf of the claim.

👁 Preview Payment Schedule   Preview the payment schedule.

↗   Open the extended view to edit additional fields. (i.e., Claimed to Date %.) Once in extended view, use the show/hide units option to toggle unit visibility.

🗑   Delete the claim.

🖋   Create a variation (Go to Creating variations for more details.)

5) Approve.

Once you have approved your claim, the details will be sent to Accounts. Once Accounts have processed the claim, the payment schedule will be sent to the subcontractor.

Review - CH25919RET-1802

INVOICE DETAILS

Type *

| Invoice ○ | Claim ◉ | Retention ○ |

Vendor
CON340 - CONTEK CONCRETE CONSTRUCTIONS PTY LTD

Invoice Date	**Scan Date**	**Due Date**
08/07/2022	08/07/2022	31/08/2022
Total Exc. GST	**GST**	**Total Inc. GST**
$33,455.00	$3,345.50	$36,800.50
Vendor ABN	**PO**	
37168839610	999901	

SUBCONTRACT AND CLAIM SUMMARY

👁 Preview Payment Schedule

Subcontract	SP2 Concrete Place & Finish (1501073)	**Invoice Number**	CH25919RET-1802
Claim Number	13	**Invoice Date**	08/07/2022
Job Number	25919	**Due Date** *	31/08/2022

Original Contract	$611,000.00	**Claimed Previously**	$736,958.89	**Claimed This Claim**	$3,000.00
Variations	$96,000.00	**Certified Previously**	$691,010.33	**Certified This Claim**	$3,000.00
Current Contract	$707,000.00	**Retained Previously**	$33,455.00	**Retained This Claim**	$300.00
Retention Allowance	$70,700.00	**Available To Claim**	($29,958.89)	**To Date Claimed**	$739,958.89
Retention Withheld	$33,755.00			**To Date Certified**	$694,010.33
Retention Remaining	$36,945.00			**To Date Retention**	$33,755.00

CLAIM LINE ITEMS

	SL Item	Description	CC	UM	Contract Amount	Claimed To Date	Certified To Date	Claim Amount	Certified Amount	Retained Amount	Previous Claim Amount	Previous Certified Amount	Tax Amount	Comment	
📦	1	SP2 Concrete Place & Finish	02.09.07	LS	$611,000.00	$605,548.89 (99.11%)	$601,850 (98.5%)	$3,000.00	$3,000.00	$300.00	$602,548.89	$598,850.33	$270.00		🖋

CANCEL   REASSIGN   APPROVE

Zero-dollar claim

The zero-dollar claim button is to be used for early claims only. A claim is deemed early if submitted before the reference date of the subcontract.

1) Click Review in the action column.

1 Review	000304	-	EVO33	EVO 1 MAINTENANCE	Appian TestCA4	1,000.00	07/07/2022	11/07/2022	Assigned	**10**

2) Click [Claim ⦿] to categorise the type.

3) Click 🚫 to generate the zero-dollar payment schedule.

Review - 3974

INVOICE DETAILS

Type *

[Invoice] **2** [Claim ⦿] [Retention ○]

Vendor
IKO01 - IKON DOORS (QLD) PTY LTD

Invoice Date	**Scan Date**	**Due Date**
07/07/2022	07/07/2022	31/08/2022
Total Exc. GST	**GST**	**Total Inc. GST**
$32,017.00	$3,201.70	$35,218.70
Vendor ABN	**PO**	
38120403536	222222	

⊞ CREATE SUBCONTRACT

Subcontract for Vendor IKO01 IKON DOORS (QLD) PTY LTD

SL	Name	Job Number	Description			
5026035	IKON DOORS (QLD) PTY LTD	26407	17.10 Ikon Contract	🔍	+	🚫
5040002	IKON DOORS (QLD) PTY LTD	26400	31 DUNCAN STREET	🔍	+	🚫
1515457	IKON DOORS (QLD) PTY LTD	26191	16.10 Ikon Doors Contract	🔍	**3**	🚫
1448564	IKON DOORS (QLD) PTY LTD	26164	METRO ARTS	🔍	+	🚫
5010488	IKON DOORS (QLD) PTY LTD	26050	WEST VILLAGE STAGE 3	🔍	+	🚫
1411226	IKON DOORS (QLD) PTY LTD	26042	SKYTOWER L5 CHILDCARE CENTRE	🔍	+	🚫
1420960	IKON DOORS (QLD) PTY LTD	25985	Fire Doors and Frames	🔍	+	🚫
1349810	IKON DOORS (QLD) PTY LTD	25701	Metal Frames and Doors	🔍	+	🚫
1370573	IKON DOORS (QLD) PTY LTD	25701	DESTINATION GOLD COAST CONSORTIUM TOWER 1	🔍	+	🚫
5012984	IKON DOORS (QLD) PTY LTD	25701	DESTINATION GOLD COAST CONSORTIUM TOWER 1	🔍	+	🚫

‹ **1 – 10** of 18 ›

4)   Click **Preview Zero Dollar Claim**

5)   Click approve.

Once you have approved your claim, the details will be sent to Accounts. Once Accounts have processed the claim, the payment schedule will be sent to the subcontractor

Review - 3974

INVOICE DETAILS

Type *

| Invoice | ⊙ | Claim | ◉ | Retention | ⊙ |

Vendor
IKO01 - IKON DOORS (QLD) PTY LTD

Invoice Date	**Scan Date**	**Due Date**
07/07/2022	07/07/2022	31/08/2022
Total Exc. GST	**GST**	**Total Inc. GST**
$32,017.00	$3,201.70	$35,218.70
Vendor ABN	**PO**	
38120403536	222222	

SUBCONTRACT AND CLAIM SUMMARY   4 ▶ **Preview Zero Dollar Claim**

Subcontract	16.10 Ikon Doors Contract (1515457)	**Invoice Number**	3974	
Claim Number	2	**Invoice Date**	07/07/2022	🗑
Job Number	26191	**Due Date**	31/08/2022	

Original Contract	$955,000.00	**Claimed Previously**	$9,000.00	**Claimed This Claim**	$0.00
Variations	$0.00	**Certified Previously**	$9,000.00	**Certified This Claim**	$0.00
Current Contract	$955,000.00	**Retained Previously**	$900.00	**Retained This Claim**	$0.00
Retention Allowance	$47,750.00	**Available To Claim**	$946,000.00	**To Date Claimed**	$9,000.00
Retention Witheld	$900.00			**To Date Certified**	$9,000.00
Retention Remaining	$46,850.00			**To Date Retention**	$900.00

CANCEL   5 ▶ APPROVE

Invoice/claim tabs
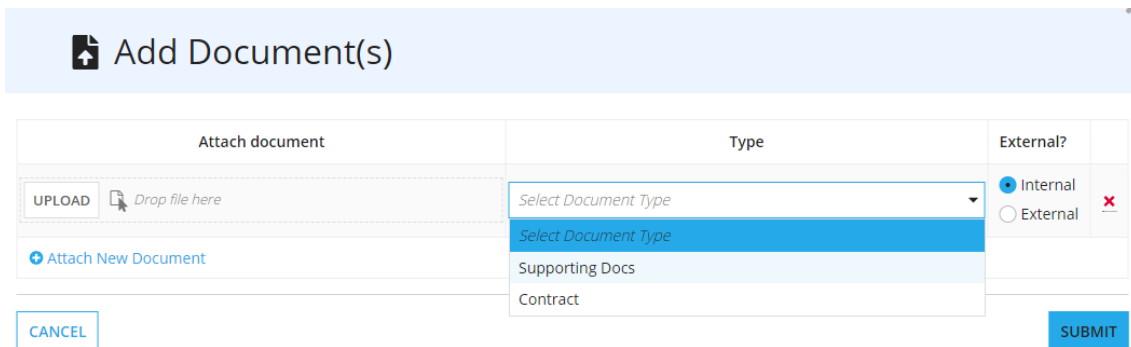
Use the document tab to attach and download documents.
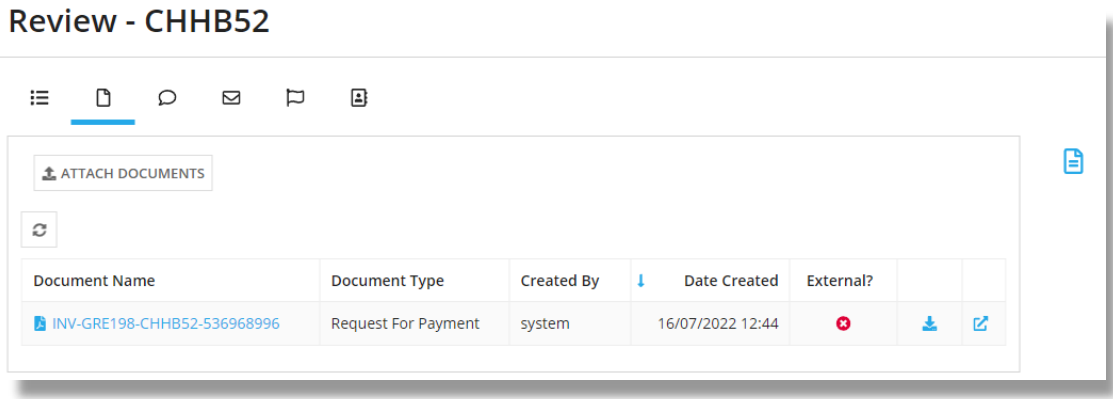
| | Attach a document. |
| | Download the document. |

When attaching a document, select the type and whether it is external or internal. External documents will be sent to the subcontractor. Internal documents will only be visible to internal Hutchies staff.

Note: Executed subcontracts will be required to be attached to the first claim.

Leave notes using the notes tab.

Review - CH25919RET-1802

NEW NOTE

ATCA **Appian TestCA1**
16/07/2022 19:00

Example note

View the status changes of the invoice/claim using the audit tab.

Review - CH25919RET-1802

Claire Hays Status Changed   16/07/22 14:24

Status Changed | Status changed from New to Assigned

Claire Hays Assignment   16/07/22 14:24

Assignment | Assigned to Appian.TestCA1@hutchinsonbuilders.com.au

Claire Hays Action Completed   16/07/22 14:24

Action Completed | Validate completed with an outcome of Assign

Hutchies.System Status Changed   16/07/22 12:49

Status Changed | Status changed to New

Retention Release

Retention Release from a scanned invoice

1) Click Review in the action column.

| 1 | Review | 000304 | - | EVO33 | EVO 1 MAINTENANCE | Appian TestCA4 | 1,000.00 | 07/07/2022 | 11/07/2022 | Assigned | **10** |

2) Click [Retention ●] to categorize the type.

3) Select the subcontract related to the retention release

4) Enter the amount to release. Select 50%, 100% or enter a specific amount.

5) Commentary is mandatory if you are releasing less that the requested amount

6) Approve (AP will release the requested amount and attach any necessary documents once approved)

Review - JC9

INVOICE DETAILS

Type *

[Invoice ○] [Claim] [Retention ○]

Vendor
NAV06 - NAVASKA CONSTRUCTION PTY LTD

Invoice Date	**Scan Date**	**Due Date**
07/07/2022	07/07/2022	31/08/2022
Total Exc. GST	**GST**	**Total Inc. GST**
$44,596.30	$4,459.63	$49,055.93
Vendor ABN	**PO**	
34646161677	222222	

Vendor
NAV06 NAVASKA CONSTRUCTION PTY LTD 34646161677

Subcontract for Vendor NAV06 NAVASKA CONSTRUCTION PTY LTD 34646161677 *

SL	Name	Job Number	Description	Retention Held
1475707	NAVASKA CONSTRUCTION PTY LTD	26191	25.10 Navaska Contract	$25,395.67

Amount Claimed	**Amount to Release** *		**Comment** *
$49,055.93	$12,697.84	○ 100% ● 50%	test
Amount includes GST	Amount includes GST		4/4000

CANCEL   REASSIGN   SAVE   **APPROVE**

Manual Retention Release

Do not use this section if AP have already scanned a retention release invoice to you. Instead, use the previous section.

1) Click the   **+ CREATE RETENTION RELEASE REQUEST**   button on the invoices tab.

2) Select a vendor. Optional to enter a job number.

3) Select the subcontract.

4) Enter the claimed amount and release amount. Select 50%, 100% or enter a specific amount.

5) Commentary is optional

6) Upload supporting documents if required. (eg. Deed of Release)

7) Approve.

Release Retention

Vendor	Job Number
HIGHBURY PLUMBING PTY LTD ✕	26371

Subcontract for Vendor HIG88 HIGHBURY PLUMBING PTY LTD 63142369757 *

SL	Name	Job Number	Description	Retention Held
1464538	HIGHBURY PLUMBING PTY LTD	26371	Hydraulics - Highbury	$56,026.70

Amount Claimed	Amount to Release *	○ 100% ○ 50%	Comment
$5,000.00	$5,000.00		Text
Amount includes GST	Amount includes GST		4/4000

Documents *Please upload the relevant Retention Release Document*

Release Retention Document

UPLOAD   *Drop file here*

CANCEL   **SUBMIT**

They key statuses that will appear in the status column are below:

- Assigned = Invoice has been assigned to Contract Administration for approval.
- AP Review = Invoice has been approved by Contract Administration and is awaiting Accounts approval.
- AP Payment Pending = Invoice has been approved by Accounts Payable and is awaiting payment.
- Paid = Invoice has been paid.
- Returned to CA = Invoice has been returned to Contract Administration from Accounts Payable.

Add a filter based on the active search filters.

Delete a filter.

Save to confirm filter changes.

Swap between filters.

Clear all filters.

Downloading

Attachments can be downloaded in bulk using the search tab. All invoices/claims will be stored and accessible via the search tab, so it is not necessary to save all to the PC.

1) Select one or more items using the tick box.

2) Click download documents.

   Optional to enter a name for the download.

3) Go to the tools tab and select the download icon on the right.

4) Open the downloaded files.

   The naming convention is DocumentType-SortCode-VendorName-Uniqueid
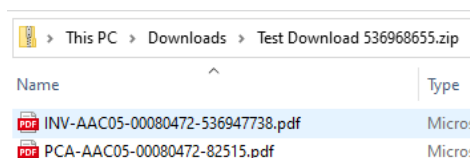
Subcontracts

The subcontracts tab allows users to view and manage subcontracts. This includes adding variations to the subcontract or editing previous variations.
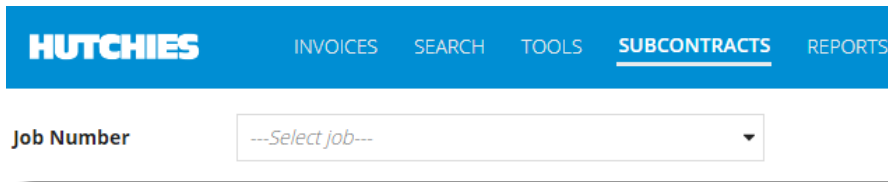
Go to the subcontracts tab and enter the job number.

1) Click the subcontract number to view the subcontract.

 Create a subcontract. (Go to Creating subcontracts for more details.)

Job	Subcontract	Subcontract Description	Sort Name	Vendor Name	Pay Terms	Retention Held
26573	15047717	QAS STATION & OPERATIONS CENTRE REFURBISHMENT	PRO289	PRO AV SOLUTIONS (QLD)	30	$0.00
26573	1507701	QAS STATION & OPERATIONS CENTRE REFURBISHMENT	MAT72	MATT TAMASSY CONSTRUCTIONS	14	$0.00
26573	1507702	QAS STATION & OPERATIONS CENTRE REFURBISHMENT	STA243	STANKE GROUP ELECTRICS PTY LTD	14	$0.00
26573	1507703	QAS STATION & OPERATIONS CENTRE REFURBISHMENT	OTI03S	OTIS ELEVATOR COMPANY	30	$0.00
26573	1507705	QAS STATION & OPERATIONS CENTRE REFURBISHMENT	TUR57	TURNER DEMOLITION & ASBESTOS PTY LTD	14	$6,350.85
26573	1507706	QAS STATION & OPERATIONS CENTRE REFURBISHMENT	LAR02	LARGES FURNITURE	14	$0.00
26573	1507707	QAS STATION & OPERATIONS CENTRE REFURBISHMENT	PLA187	PLASTERING UNLIMITED	14	$6,050.00

Once you have selected the subcontract, you will see the below screen showing subcontract summary and claim history.

📝 CREATE VARIATION   Create a variation to the subcontract. (Go to creating variations for more details)

To see claim details, click on the claim number under the claim history section to see the claim line items.

Payments Training Manual

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Creating subcontracts

Create a subcontract from the subcontracts tab or when viewing an assigned claim.

+ CREATE SUBCONTRACT

Enter the details of the subcontract.

- The subcontract ID will automatically created with the following naming convention: Job Number–Vendor. This can be edited/overridden if required.

- Select whether to hold GST and retention on the job. The line items will default to what you set at the header level

- Add additional lines using ⊕ Add line item

Click the submit button when complete.

Create Subcontract

Vendor

OTIS ELEVATOR COMPANY ✕

Job Number		**Subcontract ID**
26573	▾	26573-OTI03S

Description *	**PC Date**	**FC Date**
Example Description	21/07/2022 📅	21/07/2023 📅

GST *   ● Y ○ N   **Retention** * ● Y ○ N   **Payment Terms** 30 ▾

Item	Description	Cost Code	Cost Type	UM	Purchase Unit	Purchase Unit Cost	Amount	GST	Retention	
1	Example	01.02.. ▾	1 ▾	LS ▾	0	0	5000	●Y ○N	●Y ○N	
2	Example 2	01.40.. ▾	2 ▾	LS ▾	0	0	500	○Y ●N	○Y ●N	✕

⊕ Add line item

CANCEL   SUBMIT

Creating variations

Creating a variation for a subcontract

Create a variation when processing a claim or when on the subcontract summary.

- Selecting the [CREATE VARIATION] at the header level will add a new line to the subcontract.

Enter the variation details.

- The variation number will show previously entered numbers as the user types. This makes it easier to increment to the next number.

- The cost code and cost type should automatically be selected based on the subcontract details. This can be edited if required

- Choose whether the variation is GST applicable (Y) or not (N).

- Choose whether to hold retention (Y) or not (N).

Click the submit button when complete.

Creating a variation for a subcontract line

Click the [icon] icon to the right of the claim line items.

- This will increase/decrease the line item selected pending the value you enter.

CLAIM LINE ITEMS

	SL Item	Description	CC	UM	Contract Amount	Claimed To Date	Certified To Date	Claim Amount	Certified Amount	Retained Amount	Previous Claim Amount	Previous Certified Amount	Tax Amount	Comment	
	1	SP2 Concrete Place & Finish	02.09.07	LS	$611,000.00	$602,548.89 (98.62%)	$598,850.33 (98.01%)	$0.00	$0.00	$0.00	$602,548.89	$598,850.33	$0.00		
	2	Extra Day Works	02.09.07	LS	$2,560.00	$2,560.00 (100%)	$2,560.00 (100%)	$0.00	$0.00	$0.00	$2,560.00	$2,560.00	$0.00		

Enter the Variation Number, Description and Amount.

All other options are set from the line item selected – these fields are not editable.

Click submit when complete.

Variations

Variation Number ?*

IV004 ✕

Description*

Example correction

Cost Code*

16.10

Cost Type*

3

Unit of Measure*

LS

Amount*

-2500

GST?*   **Retention***

● Yes ○ No   ● Yes ○ No

CANCEL   SUBMIT

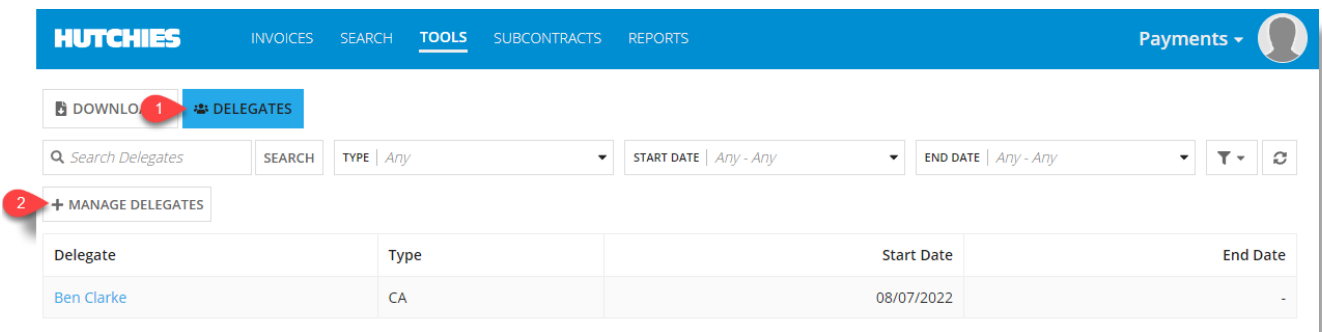# Tools

Delegation

Go to Tools section on the navigation bar.

1) Click Delegates.

2) Click manage delegates.

3) Select add new delegate or edit an existing delegate.

4) Enter the delegate's name, type, start date and end date.
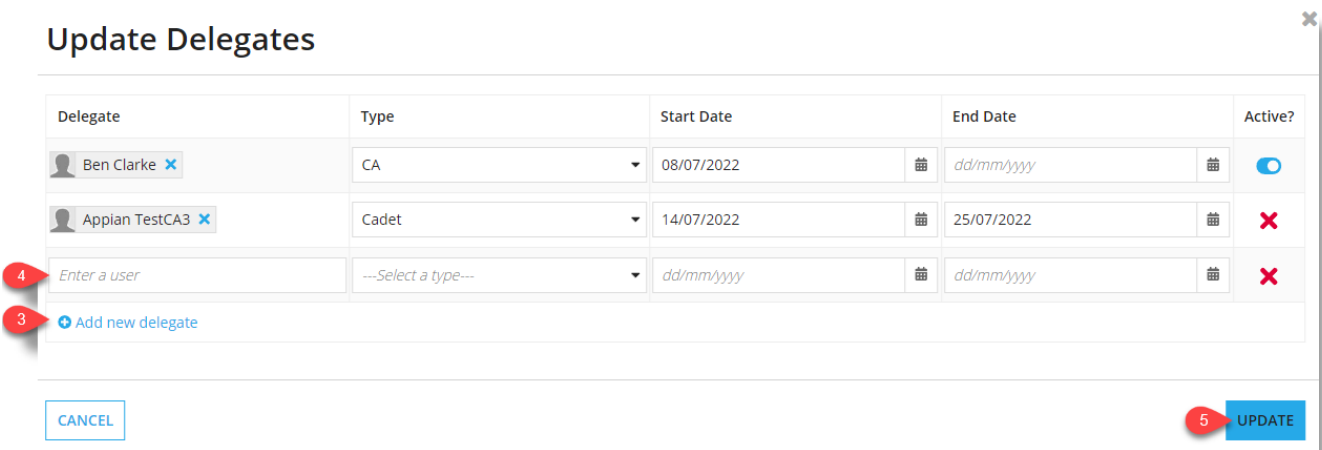
CA type will have the same rights as the CA delegating.

Cadet type will be able enter data but the CA delegating will have to do the final approval.

- Leave the end date blank to let the permission run indefinitely.
- Deactivate to suspend the delegation.

5) Click update to confirm changes.

Reassigning

Items which are intended for other users need to be reassigned.

1) Click Review in the action column.

2) Click reassign.

3) You have two options for reassigning
    a) Tick the Assign to AP box if you are unsure of the recipient
    b) If you know the intended recipient, lookup their name from the Assign to CA box.

4) Enter a comment and click reassign to complete.

Reports

The reports tab provides reports of unprocessed invoices/claims per team.

Enter a CA name to get the list of invoices which have been assigned to them.

View the department breakdown which gives an overview of who has been assigned invoices.
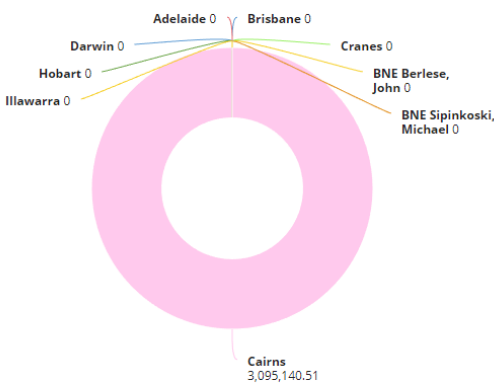
Version Control

Version	Review Date	Name	Actions / Amendments
1.0	16/07/2022	Oliver Higham	First Version