Login and Setup

Login

You can log in to **simPRO Mobile** with your simPRO login credentials only if you have a mobility licence assigned. Additionally, you should select the correct domain, which is your simPRO web URL.

Logging in to **simPRO Mobile** for first time after installation, downloads the entire set of data from **simPRO** which may take some time. This is required for the app to operate completely offline. After this initial login, you can refresh the app periodically to quickly load any updated information from simPRO. Note that the loading time for **simPRO Mobile** depends on internet connection and your device specifications. **simPRO Mobile** is available for Android (versions 4.4 and above) and iOS (version 9 and above).

- To log in to **simPRO Mobile**, enter the **simPRO URL** which is the text following "**https://**" and preceding **.simpro** from your simPRO web page URL. For example, the **simPRO URL** is **tradeservices** for **https://tradeservices.simprosuite.com**.
- Tap the blue text following the **simPRO URL** field to ensure the correct domain is selected. For example: **simprocloud.com** or **simprosuite.com**.

simPRO Mobile keeps you logged in unless you tap **Logout** in the menu, uninstall the app, or clear cache for the simPRO Mobile using your device settings. If **simPRO Mobile** is forced closed by you or the operating system, you are redirected to the **Schedule** page once the login page is loaded.

Modules

simPRO Mobile is currently released with the **Quote and Sales**, **Timesheet** and

Service that integrate exclusively with simPRO.

If you update the **simPRO Mobile** app while you are logged in to it and the **Timesheet** module check box is enabled in your Employee / Contractor card, you must perform a pull-down refresh. You can then swipe the screen to the right or tap the menu icon at the top-left corner to access the **Timesheet** module.

Ensure your simPRO Mobile is updated to the latest version. For more information on the new features and improvements, see **Release Notes** in our [Help Guide](#).

Settings

In **simPRO Mobile** > **Settings**, you can view account and device information, as well as change your display language.

Access the app, swipe the screen to right or tap the menu icon at the top-left corner and tap **Settings**. Click **About** to view the following information:

- Name of the logged in user
- **simPRO Hostname**: URL of your simPRO build that is being accessed by **simPRO Mobile**
- **Domain**: simPRO domain name
- **Device**: Model of the device
- **Platform**: Operating system version
- **Version**: The simPRO Mobile version number

simPRO Mobile detects and sets your **Language** based on the country of your simPRObuild. To change your display language, select the language from the drop-down list, then tap **OK**. Currently, options for English and Spanish speaking users are available.

Toggle off the **Download Price Book images and Supporting Materials** option to limit your data usage and optimise **simPRO Mobile** loading time.

On your first log in to the **simPRO mobile** app, you are presented with options to set a default module for each login. Alternatively, go to **Settings > Choose your**

default module, toggle **ON** to open the selected module when you next log in to simPRO.

Reset your password

To reset a forgotten password:

1. Tap **Forgotten Password.**
2. Enter the **simPRO URL** and the registered email address.
3. Tap **RESET PASSWORD**.

A link to reset your password is then sent to the email associated with your login.

To learn about how to set up simPRO Mobile with simPRO, go to our [Help Guide](#).

Quote and Sales

Enterprise Only

How do I view my agenda and manage drafts?

How do I create a new quote or job?

How to I create different options for the customer?

How do I present a quote to the customer?

To learn about how to set up simPRO Mobile with simPRO, go to our Help Guide.

Manage Agenda and Drafts

Manage the agenda

Swipe from the top on the **Agenda** page or tap the refresh icon to load updates from simPRO. The quotes and jobs that have passed their scheduled time move into the **Past** section, even if they are not completed.

Updating the agenda only sends data one way: from simPRO to the **Quote and Sales** module. The module only sends data to simPRO when you send a quote or job to simPRO with a stable internet connection.

To access and update a scheduled or assigned quote or job, tap the **blue customer name**. You can then view the customer, corresponding site, scheduled time, applied membership, quote or job contacts, description, and notes. Once you open a quote or job from the **Agenda**, you can then access and process the **Options**.

Manage drafts

Quotes or jobs that are created or updated in the **Quote and Sales** module are saved as drafts before submitting them to simPRO. These appear with a **Draft** badge on the **Agenda** page for the quotes or jobs scheduled or assigned to you for the current day. To view the entire list of drafts that have been scheduled or assigned, regardless of the date, access **Agenda** and tap **Drafts**.

You can store up to 50 drafts in the module. Tap the delete icon on a draft and tap **YES** in the message box to remove a draft from your list.

If you log out of **simPRO Mobile**, drafts that are not submitted to simPRO are discarded. To avoid losing your data, ensure that you submit all quotes and jobs to simPRO before logging out.

To learn about how to set up simPRO Mobile with simPRO, go to our Help Guide.

Create a Quote or Job

To create a quote or job in the **Quote and Sales** module:

1. Access the **Agenda**.
2. Tap the **green add** icon **> NEW JOB** or **NEW QUOTE**.
3. Tap the **Customer** field to search and select an existing customer, then tap **ADD**.
    - Alternatively, tap the **green add** icon to create a new customer.
    - To change the selected customer, tap the customer name and tap **Remove**.
4. Tap the **Site** field to search and select an existing site, then tap **ADD**.
    - Alternatively, tap the **green add** icon to create a new site.
    - To change the selected site, tap the site name and tap **Remove**.
5. Click **Insert Script** to enter relevant quote or job script as **Description**.
6. Enter public **Notes**, if required.
7. Tap **NEXT**.

All quotes and jobs created in the **Quote and Sales** module are Service jobs.

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Build Options

Follow the instructions below to build an option to present to a customer:

1. Access the required **Quote** or **Job** from **Drafts** or **Agenda**, if it is scheduled.
   - Note that all cost centres on a quote or job are accessible in the module and are not limited to the one that the technician has been scheduled to.
2. Under **In this quote** section, tap the **Option** name to edit an existing option. Alternatively, tap the **+ ADD** icon to create a new **Option**.
3. Tap to select a cost centre from the list.
4. Enter a new **Option heading** or edit the heading for an existing option, if required.
   The new **Option heading** renames the corresponding cost centre in Enterprise when the project is sent to simPRO.
5. Click **Insert Script** to enter a relevant quote or job script as **Description** or manually enter a new description.
6. Tap **Price Book** to select pre-builds, catalogue items, labour, one off items, and service fees required to build the option.
   If any service fees, catalogue items or pre-builds are not available, log off and log back in to sync your materials with simPRO Mobile.
7. Tap **Pre-Builds** and select the applicable group and sub-group.
8. Tap the check box to select the required item and tap **ADD**.
9. Go back to select and add the required **Catalogue** items from the **Price Book**.
   - Tap **View Details** under the pre-build or catalogue item name to see the default image uploaded in simPRO, adjust required quantities and apply **Add On** pricing.
   - For **Pre-builds**, you can access URLs that link to supporting materials, and a breakdown of components.
10. Next, add **Labour** rates from the **Price Book**.

- If catalogue items or standard price pre-builds include estimated time, the selected labour rate is populated with relevant number of hours if **Auto-calculate** is enabled. Note that **Auto-calculate** is always enabled by default.
- Adding more labour rates, divides the estimated time equally between the selected labour rates.

11. To view labour rate details and manually specify labour hours, toggle off **Auto-calculate**.

12. For any additional charges that are not covered by existing items or **Labour** rates, create and add **One off Items** to the **Option**.

13. Go back to the **New Quote** or **New Job** page and tap **+ ADD** to continue creating more **Options**. Learn more in Create Quote or Job.

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Present Options

Present Options

Follow the instructions below to present an option to a customer:

1. When your options are ready, tap **Present Options**.
    - Alternatively, tap **Bill all Options** to access the **Billing** page directly if the customer is ready to proceed with all options you have built.
    - The module displays the options below your company logo, including the total price in green, what the customer is saving, and what the customer could save if the membership with the maximum discount is applied.
    - If the highest level of membership has already been applied, no alternative pricing is shown. This indicates to the customer that they are already receiving the best possible pricing option.
2. Tap **Show Details** to display an itemised view of the parts and labour, **Regular price**, **Add-on price**, and savings.
3. Tap the item links in pre-builds and catalogue to present a more detailed view to the customer.
    - Tap **View Details** under the pre-build or catalogue item name to see the default image uploaded in simPRO. Learn more in [Pre-Builds](#) and [Create an Catalogue Item](#).
    - For **Pre-builds**, you can access the URLs for supporting materials, and a breakdown of components.
4. Tap **Get a better price with our Memberships** to view a pricing comparison by swiping between the different memberships available.
5. To apply or upgrade a membership, select the check box to the left of the membership name. This updates the option pricing automatically and the new membership is added as a line item to the option.

- An asterisk besides a membership name indicates that the particular membership offers customer the maximum savings.
- When a quote or job is sent to simPRO with a newly purchased membership, this default membership cost centre is added in simPRO.

6. To select an option, tap the circle at the top right of an option. The total price at the bottom adjusts according to how many options are selected.
7. Tap **Proceed** to proceed with the customer's chosen option.
   - The selected options are saved against the current quote / job as a primary cost centres. The unselected options are retained as optional cost centres for quotes, however for a job, these are discarded.

Billing

The **Billing** page is a final summary of the selected option.

1. Tap **Show details** to access individual pre-build and catalogue items and their corresponding details from this page.
2. Tap **Tax** at the bottom to edit the applicable tax, if required.
3. For quotes, you can choose to add a customer's signature or email the quote to the customer and any other recipients.
4. Tap **Done** to upload the project to simPRO.
5. For quotes, you can **Go to Agenda**, **Email Quote**, **Convert to a Job**, or **Open Connect** to access and complete the work. Alternatively, for jobs you are prompted to open **Connect** or return to the **Agenda** page.

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