Login and Setup

Enterprise Only

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

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.

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

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 simPRO 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.

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

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.

Timesheet

How do I view and manage my agenda?

How do I create a new time block?

How to I manage the Times page?

How do I clock on and clock off?

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

How to Create a New Time Block

Create a new time block

From the **Agenda** page, access the **Time Block** page to record the time spent on a quote, job or activity.

Follow the instructions below to create a new **Time Block**:

1. On the **Agenda** page, tap the + icon.
2. Tap **START RECORDING** to record actual time for the time block.
    - The start time is rounded based on increments configured in **System Setup > Defaults > Schedule > Schedule Format** and the **Time Block Threshold** set in **System Setup > Mobile > Timesheet Module**. For example, if the **Schedule Format** is set to 15 minutes and the **Time Block Threshold** is set to 0 minutes, starting recording at 8:01 am, defaults the **START** time to 8:15 am.
    - To manually adjust the **START** time, tap in the field and select the required time. If you use **START** / **STOP** to record time, this recorded time is displayed for future reference and remains unchanged even if you manually adjust the start and end times.
3. Tap **STOP** to populate the **END** time.
    - The recorded time rounds to the nearest 15 or 30 minutes based on the default **Schedule Format** and **Time Block Threshold**.
    - To manually adjust the **STOP** time, tap in the field and select the required stop time or tap **END**. You are limited to select 15 or 30 minutes increments based on the **Schedule Format** settings.
    - To remove the current recorded time block, tap **DISCARD**.
      If a time block is locked in simPRO Enterprise, you can not discard it through the **Timesheet** module.
4. Next, choose to **Record time against** a **Quote**, **Job**, or **Activity**.

5. Search and select the required quote, job, or activity from the list to apply the recorded time against it.

View quote / job details

For quotes and jobs, you can search using the quote / job number, customer, or site. You can search and select from the following projects:

- All pending jobs
- All progress jobs
- Quotes and jobs for which you are the assigned technician and were due in the past 45 days, are due on the current day or in the next 45 days. This provides you with a total of 91 days, or three months of due projects.
- Quotes and jobs scheduled for you up to 45 days in the past, on the current day, and up to 45 days into the future. This provides you with a total of 91 days, or three months of scheduled projects.

Quotes or jobs scheduled / assigned and due within the 91 day period are accessible regardless of their stage or status. However, archived and fully Invoiced jobs are read only, unless defined otherwise in the **Timesheet Module Settings** set up in simPRO.

On the **Quote Times** / **Job Times** page, you can:

- View details, such as the customer name, site information, quote / job description and cost centre description.
- Tap icon to view the site in your device's default maps application.
- Tap to open the device's phone application with the customer's contact number populated.
- Tap to open the default email application with contact's email address populated.
- Tap the down arrows to view descriptions, if any, for the quote, job and cost centres.

Manage and submit time blocks

You can add multiple time blocks and schedule them throughout the day. Additionally, you can schedule time blocks for multiple cost centres in a quote or job at once.

Once you proceed to the **Activity** / **Quote** / **JobTimes** page, you can select from the following options, to manage and submit time blocks:

1. Tap the drop-down arrow besides the current date and select the required date to record the time block.
2. Tap **START** or **END** to adjust the duration of the time block.
   - If you are creating new time blocks, they all must have start and finish times before you proceed to submit.
3. Tap **+ ADD COST CENTRE** to select one or more cost centres to record the time against.
   - You can access all cost centres on the job regardless of whether you have been scheduled to them or are the assigned technician.
   - The maximum number of cost centres you can add is defined by the total number of **Schedule Format** intervals that can fit into the time block. You must have at least one interval per cost centre added. If you attempt to add more cost centres than the available 15 or 30 minute intervals, you are asked to add more time before adding further cost centres. For example, if the time block is 60 minutes then for a 15 minute interval you can select up to four cost centres.
4. Next, tap **Record time as** to select the scheduled rate for each cost centre.
   - To create a time block for work that is not chargeable to the customer, such as driving to the job, or preparing materials, select a non-billable schedule rate.
   - You can only select from schedule rates that are set to **Show in Mobile** in simPRO settings.

- If no scheduled rates are set to **Show in Mobile**, your default schedule rate is used for the **Timesheet** module.
- For a time block scheduled in simPRO with a schedule rate not set to **Show in Mobile**, the rate is displayed, but if you change to a different rate, you are not able to revert back to a rate not set to **Show in Mobile**.

5. Tap **WORK NOTES**, to record notes on the job card and in the activity time line for the associated cost centre. If you are creating time blocks for an activity, tap **NOTES** to add a schedule note, which you can access from the schedule in simPRO.
6. If the project has multiple cost centres, use the slider to redivide time amongst each of the selected cost centres. Time can be distributed in hours or as a percentage of the worked time.
7. Tap **+ ADD DUPLICATE TECHNICIAN/PLANT** to select one or more resources, including employees, contractors and plant items enabled for scheduling. This duplicates the time block and adds it to the schedules of the selected resources in addition to your own.
8. Tap **Done**.
   - A new time block is listed on the right side of the page on a tablet and on a phone, it is listed below. To submit the recorded time, you must have created at least one time block and tapped **DONE**.
   - Recording time for a quote / job with multiple cost centres creates and lists multiple time blocks on the right side on a tablet and on a phone, these are listed below.
9. Tap **+ ADD ANOTHER TIME BLOCK** and **ENTER TIMES** to enter or record additional times, as required.
10. Add **+ ATTACHMENTS** to take photos or upload images from the gallery, if required. To access the uploaded attachments, tap **+ ATTACHMENTS** again. You can view the number of attachments added, click to preview and remove any of the uploaded attachments. A maximum of two attachments per quote or job are allowed.

11. Tap **SUBMIT** to send the time blocks to simPRO and select:
    - **Add time for this Activity / Quote / Job**: To continue adding additional time blocks to the same project.
    - **Add time for another Quote / Job**: To create a new time block for other quotes or jobs.
    - **Add time for an Activity**: To create a new time block for an activity.
    - **Go to Agenda**: To return to the **Agenda** page.

Record time for scheduled or due work

If you have a list of scheduled or assigned quotes, jobs, or activities, you can access and update them from the **Agenda** page.

1. Access the **Agenda** and tap the relevant quote, job, or activity.
2. The start and end time is populated if scheduled or shown blank if the project is assigned and due. You can record actual time against this block by tapping **START** and **END**. Or, manually update the **START** and **END** times, as required.
3. Add multiple time blocks, divide time between different cost centres, select schedule rates, enter work notes and attach images before you submit the time blocks to simPRO.

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

How to Manage Timesheet Agenda

Overview

The **Agenda** page is a timeline of all your scheduled and assigned, quotes, jobs and activities, for the current day, as defined by the date at the top of the agenda. The **Current**, **Upcoming** and **Past** sections in the **Agenda** list the work that is scheduled specifically to you (the logged-in simPRO Mobile user) for the current day. The **Due Today** section lists work that have you as the **Assigned Technician**in simPRO and are due on the current day.

- Scheduled start and finish times are not displayed for assigned quotes or jobs. You can either record these times live, or enter them manually.
- For a project that is assigned, due, and scheduled on the same date, the project is displayed only once as scheduled.

If you are currently recording time for a time block, the + icon is replaced with a → icon. Use the → icon to navigate back to the project you are recording time for. After the recording time process is complete, the + icon is available again allowing you to create additional time blocks.

Manage the agenda

Refresh Agenda

Swipe down from the top on the **Agenda** page or tap the refresh icon in the top right corner of the screen to load the most current data from simPRO. The quotes and jobs that have passed their scheduled time move into the **Past** section, even if they are not completed. Refreshing the agenda only retrieves data from simPRO to the **Timesheet** module. The module only sends data to simPRO when you submit a recorded time block to simPRO with a stable internet connection. If you are working offline, time blocks you submit are queued and automatically sent when you establish a stable internet connection.

Access and record

To access and update quotes, jobs and activities listed on the **Agenda**, tap the blue customer or activity name. You can then view all the corresponding details, such as the customer, site, scheduled time and job / cost centre description. Once you open scheduled work from **Agenda**, you can access and record the **SCHEDULED START** and **SCHEDULED END** time in real time. If scheduled times are different as compared to the actual time you have worked, you can record or manually change them before submitting to simPRO. Change the date on the **Agenda** page to access and edit time blocks for activities, quotes, and jobs that are scheduled or due, on the selected date.

If you are online, you can add new time blocks for any date by changing the date on the **Agenda** page, as required. However if you are offline, you can only access and add new time blocks for the current, previous and following calendar week. Recording **START** and **END** times live is available only for the current date. For any other date, you need to enter the **START** and **END** times manually to edit / create a time block.

CLOCK ON and CLOCK OFF

Further, you can tap **CLOCK ON** to time stamp when you start work and **CLOCK OFF** to time stamp at the end of your day's work. Your **CLOCK ON** and **CLOCK OFF** time stamps along with your total clocked hours are sent to simPRO and recorded in **Schedules > Timesheets**. Additionally, when you **CLOCK OFF**, you are prompted to fill out any empty time intervals between the **CLOCK ON** and **CLOCK OFF** timestamps, as time blocks, for quotes, jobs and activities. **CLOCK ON** / **CLOCK OFF** is available only for the current date.

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

How to Manage the Times Page

Overview

Navigate to the **Times** page to view your schedule for the current day, update and create new time blocks, clock on and off and review your work time as compared to the total time scheduled.

Times report

The **Times report** is a graphical overview of the amount of time scheduled as compared to the amount of time worked for the current calendar week.

Navigation in the **Times report**:

- Use the drop-down arrow on the **Times report** grey bar to view the report bar graph.
- Use the arrows besides the date range to view the report for a different week. Only the current, previous and next calendar weeks are accessible, regardless of whether you are online or offline.
- The letters on the X axis represent abbreviations for days of the week. Tap on a letter to navigate to a different day of the week.
- The Y axis represent the number of hours.
- Use the arrows besides the date shown to view the report for an earlier or next day.
- Blue bars represent the time that has been worked and submitted to simPRO from the **Timesheet** module.
- Grey bars represent the scheduled time.

View and edit schedules

On the **Times report**, tap a day on the X axis to view the corresponding scheduled time blocks in the section below. Alternatively, tap the arrows next to the date displayed under the **Time report**.

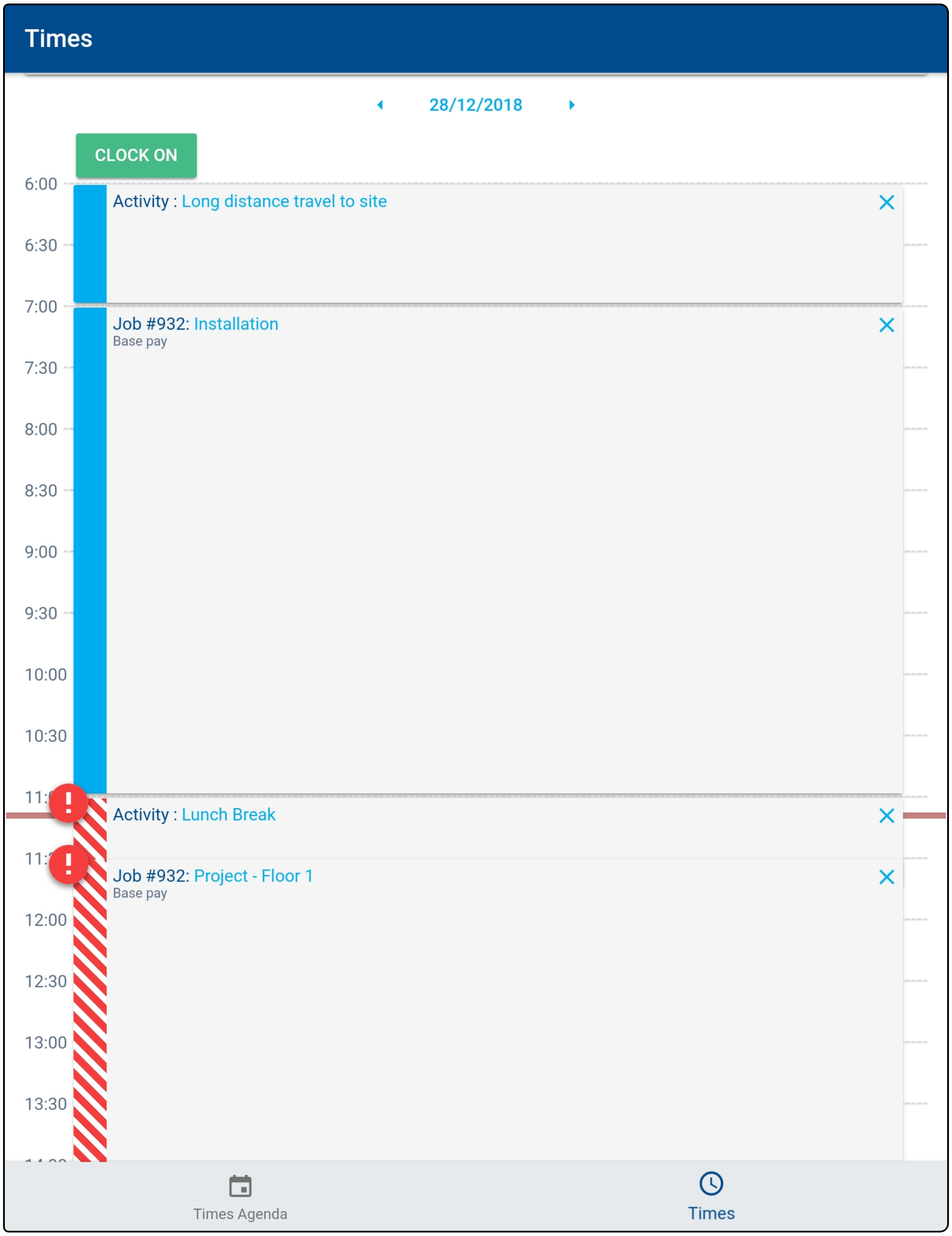
When offline, you can only navigate to days in the current, previous and following calendar week. However when online, you navigate to any calendar day. But, only the time blocks scheduled in the upcoming or previous 45 days are displayed on the **Times** page.

By default, the section below the **Times report** displays schedule for the current day. You can add / edit time blocks manually or in real time. On the **Times** page:

- The scheduled quotes / jobs, appear as a grey time block with the cost centre name displayed against each of them.
- A time block that is worked on and submitted from the **Timesheet** module appears blue.
- Any conflicting time blocks appear red and white with a warning icon.

Managing the assigned schedule:

- To create a new time block in the schedule gaps, tap .
- To delete an existing time block, click  on the grey bar.
- Tap an existing time block to edit or delete the time block or add new times.
- The thin red line in the schedule denotes the current time.
- To time stamp your start and finish times for the day, tap **CLOCK ON** or **CLOCK OFF** respectively.
- For two time blocks with conflicting times, tap the warning icon to resolve the times.



For each time block, you can **EDIT**, add **NOTES** to or **DISCARD** the time block.

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

How to Clock On / Off

Overview

Using **CLOCK ON**/ **CLOCK OFF**, record a time stamp of your start and finish work time for each day. Your **CLOCK ON** and **CLOCK OFF** times along with your total clocked hours are sent to simPRO and recorded in **Schedules > Timesheets**. So, if you only need to track daily start / finish times and the total hours between these times for your employees, use this feature instead of managing individual time blocks.

On the **Agenda** or **Times** page, tap **CLOCK ON** when you start work and tap **CLOCK OFF** when you finish.

Only when you tap **CLOCK ON** at the start of your workday, the **CLOCK OFF** button is accessible to tap at the end of your workday.

You can **CLOCK ON** and **CLOCK OFF** only once per calendar day. You can **CLOCK ON** and **CLOCK OFF** only for the current calendar day. If you navigate to a different date in the **Timesheet** module, this feature is unavailable.

When you **CLOCK OFF** the following information is displayed:

- **Total time**: This is the sum total of time blocks recorded for the current day.
- **Clocked hours**: This is the time elapsed between when you tapped **CLOCK ON** and **CLOCK OFF**.
- **UNDO CLOCK OFF**: Undo clocking off and continue recording clocked hours so that you can clock off later.

If you have any time gaps between scheduled or recorded time blocks for the current day, tapping **CLOCK OFF** displays a warning message.

The **Clock off time** warning message lists the following information:

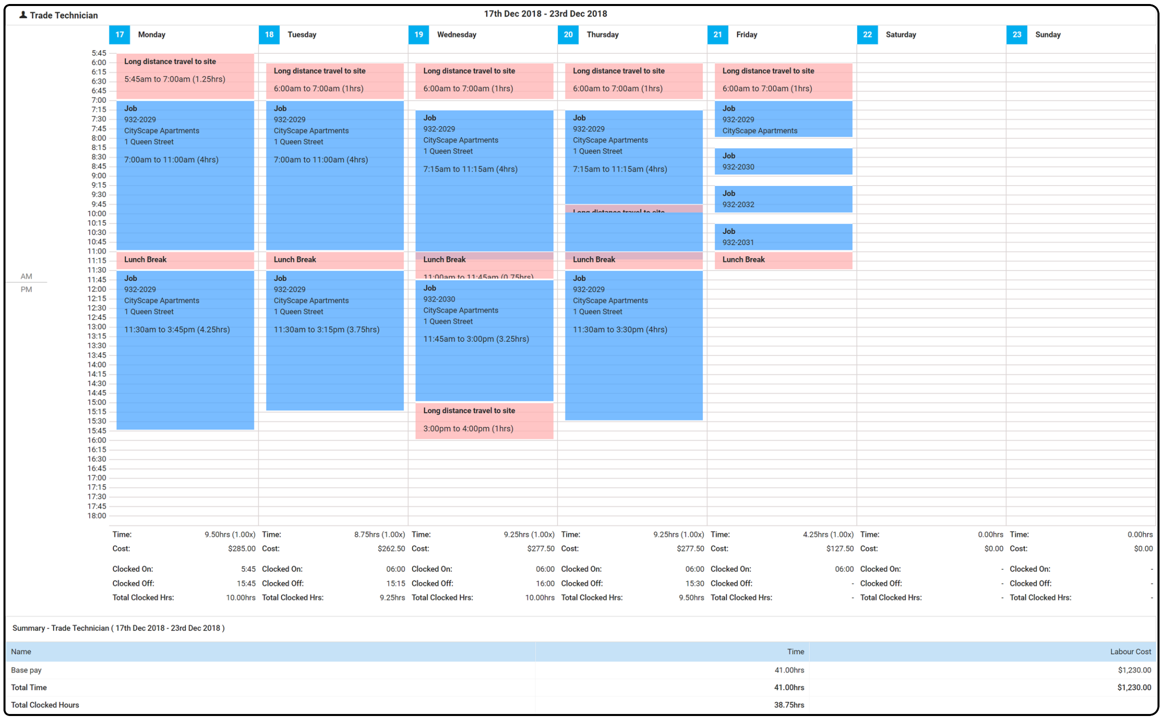
- **Record all as**: Records all empty and available time slots between the **CLOCK ON** and **CLOCK OFF** time stamps with time blocks for the same quote, job or activity. If your **CLOCK ON** or **CLOCK OFF** splits an interval of time as defined in the **Schedule Format**, you are prompted to fill the entire interval with a time block. For example, if you are using a 30 minute **Schedule Format** and clock on at 8:46 am, 8:30 am - 9:00 am is considered as an empty time slot to be filled.

- **Record as**: All the empty intervals of time that fall within your **CLOCK ON** and **CLOCK OFF** time stamps are listed on this page. Record each of these empty intervals of time individually against quotes, jobs, or activities, as required.
- **DON'T CLOCK OFF**: Undo clock off and continue recording your clocked hours so that you can clock off later.
- **CLOCK OFF ANYWAY**: Clock off without filling any of the empty intervals of time that fall between your clock on and clock off time stamps.

View recorded clocked time

When you tap **CLOCK ON** in the **Timesheet** module, clocked in time is instantly displayed on the employee's timesheet in simPRO. Similarly, after you tap **CLOCK OFF**, the clock off time and total clocked in hours are sent to simPRO.

Clocking on and off does not record actual hours against jobs. To track labour costs, you must add time blocks to the required project manually.



Go to **Schedules > Timesheets**, select the relevant employees or contractors and click **Submit**. If the selected employees / contractors are assigned a **Timesheet** module licence, their **Clocked On** time, **Clocked Off** time, and **Total Clocked Hrs** are displayed under each day and in the **Summary**.

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