

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 6 and above) and iOS (version 11 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.

To experience the latest features and improvements, download the latest version of simPRO Mobile app:



When you update simPRO Mobile, please refresh all service data.

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**. Tap **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 simPRO build. 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 **simPROmobile** 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.

Quote and Sales

How do I view my schedule 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?

What notifications do I receive?


How to Manage Schedule and Drafts


Manage the schedule

Swipe from the top on the **Schedule** page or tap the refresh icon to load updates from simPRO.


For quotes and jobs, following details are displayed:

- Scheduled time
- Company name
 - For multi-company build users, if the technician is assigned to multiple companies, the company that the quote or job is scheduled in is displayed next to the scheduled time.
- Work type and number
- Customer name
- Quote or job name
- Site name
- Site address
 - If no site address exists, this field appears blank.


Tap the **Present**  icon if you know a quote or job is ready to be presented to

a customer. Use the  icon to access the built-in maps application based on

the site coordinates on your mobile device.

Tap the  icon to view all work contacts including customer, site, quote / job

contact, quote salesperson and job project manager.

Tap **All Contacts** to list the available contact information, including all of the site and customer contacts. Tap  for the required contact and choose from the

following options:

- Tap **Call** to open the default phone application with the contact number populated.
- Tap **Message** to open the default phone messaging application with the contact number populated.
- Tap **Copy number** to copy the phone number to your device and paste it in another location.

To access and update a scheduled or assigned quote or job, tap the **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 **Schedule**, you can then access and process the **Options**.

Updating the schedule 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.

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 **Schedule** 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 **Schedule** 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.

How to Create a Quote or Job

New quote or job

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

1. Access the **Schedule**.
2. Tap the **add**  icon > **JOB** or **QUOTE**.
3. If you are using Multi-Company and are assigned to more than one company, select the **Company** to build the **Quote** or **Job** for and tap **OK**.
4. Tap the **Customer** field to search and select an existing customer, then tap **ADD**.
 - Alternatively, tap the **add**  icon to create a new customer.
 - To change the selected customer, tap the customer name and tap **Remove**.
5. Tap the **Site** field to search and select an existing site, then tap **ADD**.
 - Alternatively, tap the **add**  icon to create a new site.
 - To change the selected site, tap the site name and tap **Remove**.
6. Click **Insert Script** to enter relevant quote or job script as **Description**.
7. Enter public **Notes**, if required.
8. Tap **NEXT**.

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

Continue creating a quote or job by [How to Build Options](#). You can [How to Complete a Scheduled Job](#) in the Service module.

How to Build Options

Build an option

Follow the instructions below to present options to a customer:

1. Access the required **Quote** or **Job** from **Drafts** or the **Schedule** or access quotes from the **Schedule** in the Service module.
 - 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 quote / job is sent to simPRO.**

5. Click **Insert Script** to enter a relevant quote or job script as **Description** or manually enter a new description. Learn more in [How to Use Scripts](#).
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 for supporting materials, and a breakdown of components.

10. Next, add **Labour** rates from the **Price Book** and tap **Option**.

- 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](#).

How to Present Options

Present Options

Follow the instructions below to present options to a customer:

1. When your **Options** are ready, tap **Present Options**. Or, tap the **Present**  icon beside the quote or job on the **Schedule** in the **Quote and Sales** module.
 - 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, part numbers, **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.
 - For **Pre-builds**, you can access 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. Learn more in [About Memberships](#).
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.
 - Learn more in [About Memberships](#).
6. Select an option using the corresponding check box. 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.

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 have the options to **Go to Schedule**, **Email Quote**, or **Convert to a Job** to access and complete the work. Alternatively, for jobs you are returned to the **Schedule** page.

Timesheet

How do I view and manage my schedule?

How do I create a new time block?

How do I submit a time block?

How to I manage the Times page?

How do I clock on and clock off?




What notifications do I receive?

How to Create a New Time Block

Create a new time block

From the **Schedule** 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 **Schedule** page, for the current day, tap the  icon.
2. Tap **START RECORDING** to record actual time for the time block.
 - For multi-company build users, if the technician is assigned to multiple companies, the company that the quote or job is scheduled in is displayed.
 - 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**.
 - 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**.
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.

Activity Times

To create an activity time block on the **Activity Times** page:





1. Tap **+ ADD DUPLICATE TECHNICIAN/PLANT** to duplicate the time block for one or more resources, including employees, contractors and plant items enabled for scheduling.
2. Tap **Record time as** and select the required scheduled rate to apply the recorded time against it.
3. Tap **DONE** create the activity time block.
4. **ADD ANOTHER TIME BLOCK**, if required or click **SUBMIT** to send the time blocks to simPRO.
 - **Add time for this Activity:** To continue adding additional time blocks to the same activity.
 - **Add time for another Job:** To create a new time block for other jobs.
 - **Add time for another Quote:** To create a new time block for other quotes.
 - **Add time for another Activity:** To create a new time block for an activity.
 - **Go to Schedule:** To return to the **Schedule**.

How to Manage Times Schedule

Overview

When you access the **Timesheet** module, the **Schedule** page is displayed. This 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 **Schedule**. The work scheduled specifically to you (the logged-in simPRO user) for the current day is displayed in a chronological order of the scheduled time. And, the **Assigned to you** section displays quotes and jobs that have you as an **Assigned Technician** 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 schedule




Refresh Schedule



Swipe down from the top on the **Schedule** or tap the refresh icon in the top right corner of the screen to load the most current data from simPRO. Refreshing the schedule 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.


For quotes and jobs, following details are displayed:

- Scheduled time
- Company name
 - For multi-company build users, if the technician is assigned to multiple companies, the company that the quote or job is scheduled in is displayed next to the scheduled time.
- Work type and number
- Customer name
- Quote or job name
- Site name
- Site address
 - If no site address exists, this field appears blank.

Tap the  icon to begin recording time for a quote or job and use the  icon to stop recording the timeblock. Use the  icon to access the built-in maps application based on the site coordinates on your mobile device.

Note that recording time initially records time for the whole quote / job and is later allocated to the individual cost centres. If you are scheduled to multiple cost centres in the same quote / job the  icon becomes a  icon for all cost centres on the schedule.





Tap the  icon to view all work contacts including customer, site, quote / job contact, quote salesperson and job project manager.

Tap **All Contacts** to list the available contact information, including all of the site and customer contacts. Tap  for the required contact and choose from the

following options:

- Tap **Call** to open the default phone application with the contact number populated.
- Tap **Message** to open the default phone messaging application with the contact number populated.
- Tap **Copy number** to copy the phone number to your device and paste it in another location.

From the **Schedule**, you can navigate to the **Times** page or create new time blocks.

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.


Access and record

To access and update quotes, jobs and activities listed on the **Schedule**, tap the 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 **Schedule**, you can access and record the **START** and **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 **Schedule** page to access and edit time blocks for quotes, jobs and activities 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 **Schedule** page, as required. However if you are offline, you can only access and add new time blocks for the current 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

You can tap **CLOCK ON** to timestamp when you start work and **CLOCK OFF** to timestamp at the end of your day's work. Your **CLOCK ON** and **CLOCK OFF** timestamps 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. You can **Undo Clock off** if you need to continue with your day's work.

CLOCK ON / CLOCK OFF is available only for the current date.

Learn more in [How to Use Timesheets](#).

How to Manage Times

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.

To navigate the **Times Report**:


- Use the drop-down arrow on the **Times Report** to view the report bar graph.
- Use the arrows besides the date range to view the report for a different week.
- The letters on the X axis represent abbreviations for days of the week. Tap 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**.

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 with assigned **Timesheet** module licence:

- 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 timestamp your start and finish times for the day, tap **CLOCK ON** or **CLOCK OFF** respectively.
- For two time blocks with conflicting times, tap the  icon to resolve the times.

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

How to Clock On / Off

Overview

Using **CLOCK ON** / **CLOCK OFF**, record a timestamp 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.

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 schedule, this feature is unavailable.

Record time gaps

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.

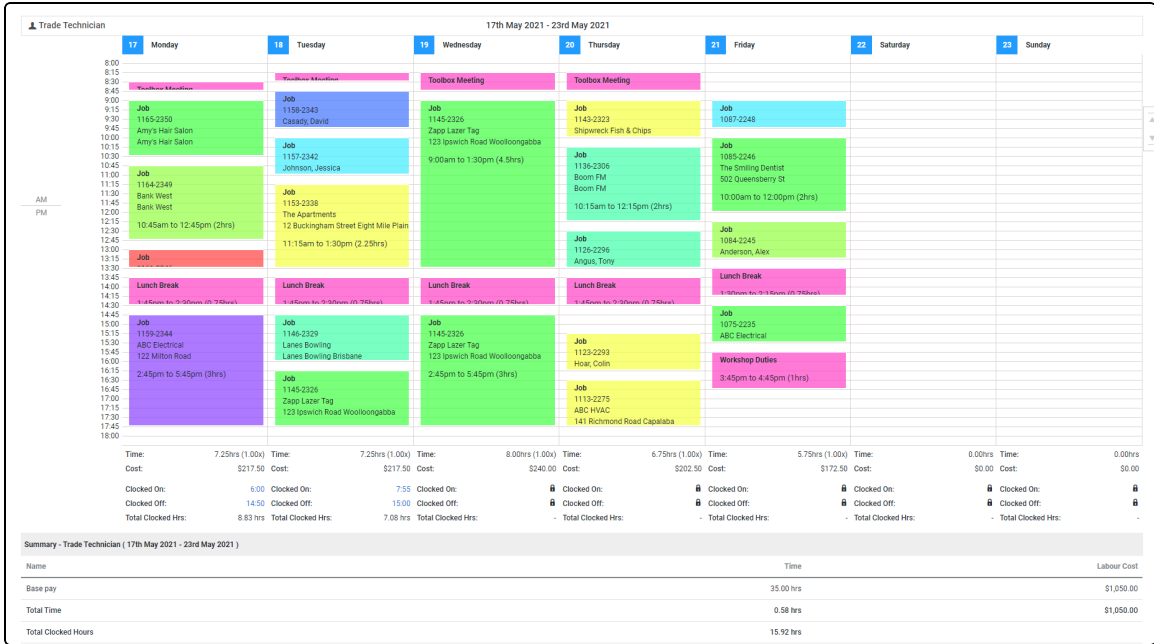
The **Clock off time** warning message lists the following information:


- **Record all as:** Records all empty and available time slots between the **CLOCK ON** and **CLOCK OFF** timestamps 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** timestamps 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 timestamps.

View recorded clocked time

When you tap **CLOCK ON**, 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**.

If a technician has made a mistake when recording their clock on / clock off time, a simPRO admin user can edit the time in simPRO. Learn more in [Generate a timesheet](#).

Service

How do I manage my schedule?

How do I manage schedule times?

How to I manage a scheduled job?

How to I manage a scheduled quotes?

How do I clock on and clock off?

How do I schedule an activity?

How do I create an invoice?

How do I create a service job?

How do I create a quote?

How do I create tasks?

How do I apply payments?

How do I view assets?

How do I test assets?

What notifications do I receive?

How to Manage the Service Schedule

Enterprise Only


Overview

Use the **Service** module in simPRO Mobile to access current project information and manage quote / job work in real time. Field technicians can easily enter clock on and clock off times, parts used, view / upload linked documents, and email job cards.

When you access the **Service** module, the **Schedule** is displayed. This is an outline of all your scheduled and assigned quotes, jobs and activities, for the current day, as defined by the date picker at the top of the schedule.

From the **Schedule**, navigate to the corresponding quote / job / activity, update and create new time blocks, clock on and off, view job cards, present quotes, and create new activities.

Schedule components


The **Schedule** displays the work scheduled specifically to you (the logged-in simPRO user) for the current day in a chronological order of the scheduled time. The coloured status bar displayed against each project on the **Schedule** matches the colour of the job status in simPRO. And, the coloured circle around 


matches the colour of the current mobile status.

Scheduled activities display the start and end time and the activity name. For quotes and jobs, following details are displayed:

- Scheduled time
- Work type and number

- Company name
 - For multi-company build users, if the technician is assigned to multiple companies, the company that the quote or job is scheduled in is displayed next to the scheduled time.
- Customer name
- Site name
- Site address
 - If no site address exists, this field appears blank.
- Cost centre name
- Quote or Job name
 - If there is no job name, it displays the cost centre name.
 - Additionally if there are multiple cost centres, this remains blank.





Tap the  icon to view the **Mobile Status, Quote / Job Status, Order number, Due date, Quote / Job Description, and Cost Centre description**. The **CONTACTS** tab lists the available contact information, such as **Site contact, Customer contact, Job / Quote contact, Salesperson, and Project manager**.


Tap **All Contacts** to list the available contact information, including all of the site and customer contacts. Tap  for the required contact and choose from the

following options:

- Tap **Call** to open the default phone application with the contact number populated.
- Tap **Message** to open the default phone messaging application with the contact number populated.
- Tap **Copy number** to copy the phone number to your device and paste it in another location.



Tap **OPEN quote / OPEN job** to access that work. For jobs, you can tap **Start travel & Navigate** to activate the **START TRAVEL** button in the job, and change

the **Mobile Status** to **Travelling**. This opens your device's default maps application. If site address is not available, you can tap **OPEN** to access the job. Use the  icon to access the built-in maps application based on the site coordinates on your mobile device. Tap the  icon to view all work contacts including customer, site, quote / job contact, quote salesperson and job project manager. Tap  again or tap the **Email** icon  for the required contact to open the default phone or email application with the contact number or email address populated.

Tap  on the **Schedule** to **FIND A JOB**, create a new job or schedule a new activity. Note that the **FIND A JOB** option is only available if you are online when using simPRO Mobile.


Note that when online you can search jobs that are scheduled or assigned to you and all pending and progress jobs, depending on your simPRO Mobile settings. Additionally, invoiced / archived jobs can appear read-only depending on the security settings.

You can search for and filter jobs to view work that is scheduled or due within a specific date range.

1. Access the **Service** module.
2. Tap the  icon > **Find a Job**.
3. To find the required jobs from the list, tap the  icon.
4. Toggle on the filters to only show jobs that are:
 - **Assigned to you**
 - **Scheduled to you**
 - **Include completed jobs**
5. Enter dates to view jobs scheduled or due between specific date range.

6. Select the **Zone** and order the jobs by
 - **Due date (Past - Future)**
 - **Due date (Future - Past)**
 - **Job No (High - Low)**
 - **Job No (Low - High)**
7. Tap **Apply Filters**.

Jobs are displayed based on the filters applied. Tap **Clear** to remove the **Filters applied** and view the entire jobs' list. Select the required job and continue to [How to Complete a Scheduled Job](#).

The  clock icon on the **Schedule** indicates that a job is currently running and time is being recorded. Click this icon to open the currently running job.

From the **Schedule**, you can navigate to manage **Times**.

Find a quote

In the simPRO Mobile **Service** module:

1. Tap the  icon and tap **Find a Quote**



2. If you use multi-company, select the relevant **Company**.
3. Enter a quote number, customer or site in the search bar.
 - The search results include all scheduled and assigned quotes and optionally all pending and progress quotes.
4. Tap to open the relevant quote.

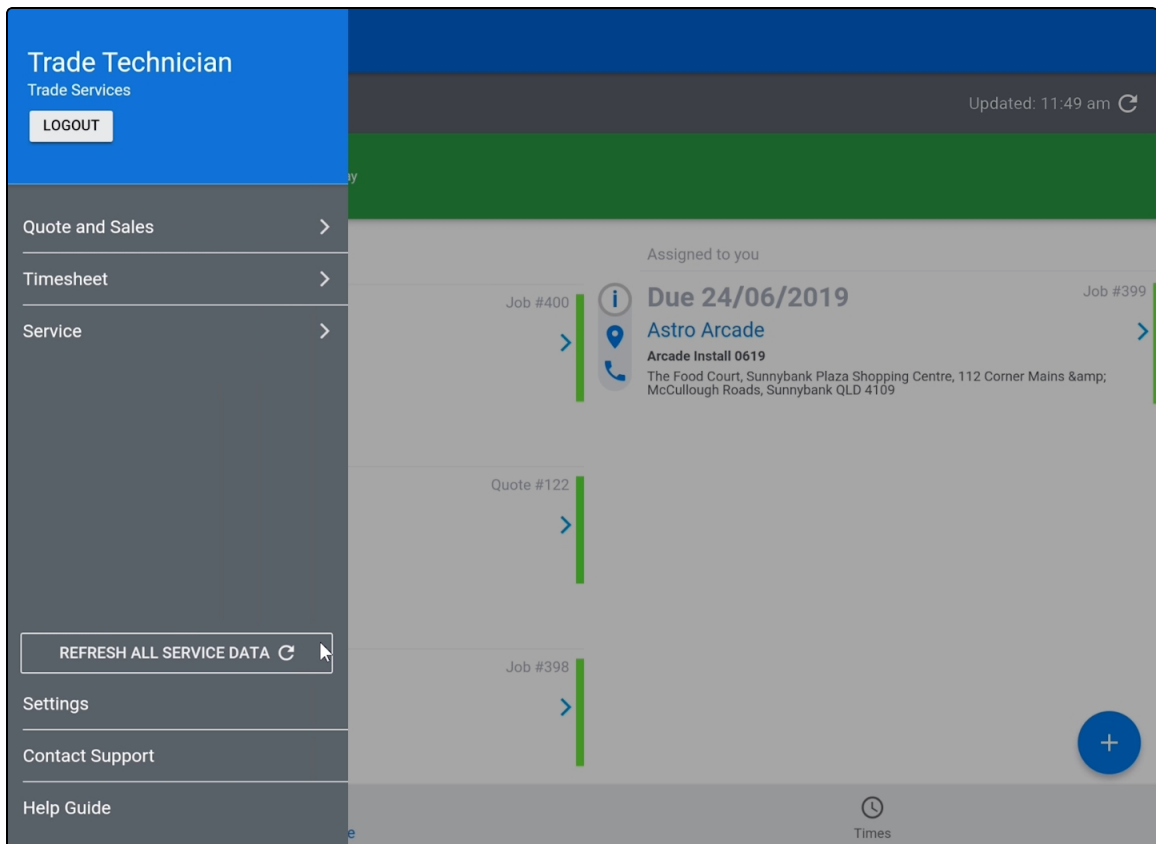
Manage schedule

Refresh the module

Any updates to the **Schedule** automatically refresh every time a field technician returns to it from any part of **Service** module. This quick schedule refresh ensures uninterrupted workflow avoiding any on-screen notifications.

Alternatively, to load the most current data from simPRO, swipe the screen to the right or tap the menu icon at the top-left corner and tap **REFRESH ALL SERVICE DATA**.

Refreshing the schedule only retrieves data from simPRO to the **Service** module. The module sends data to simPRO in the background at regular intervals if you have a stable internet connection. Changes to work notes, stock and materials are uploaded when the job is submitted. If you are working offline and you finish a job, the project is queued and automatically sent when you establish a stable internet connection.




Navigate and access

To access the scheduled and assigned quotes / jobs / activities listed in the **Schedule**, tap the corresponding project. Details such as the customer, site name and address, scheduled time and job / cost centre description are displayed for selected quote or job. For activities, options for creating time blocks are displayed.

If you change to any other date than the current day on the **Schedule**, you can access the detailed job information but cannot enter the **START TRAVEL** and **START WORK** times. Similarly, when you tap a job, you can select **TODAY** or the scheduled date in the **Open job for** pop-up. You can record the travel and work times only if you select **TODAY**.

For activities, you can edit time blocks for the selected date, but, you cannot access quotes for any other date except the current day.

CLOCK ON and CLOCK OFF

You can tap **CLOCK ON** to timestamp when you start work and **CLOCK OFF** to timestamp at the end of your day's work. Your **CLOCK ON** and **CLOCK OFF** timestamps 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. You can **Undo Clock off** if you need to continue with your day's work.

CLOCK ON / CLOCK OFF is available only for the current date.

Learn more in [How to Use Timesheets](#).

How to Manage the Schedule Times

Enterprise Only

Overview

Use the **Service** module in simPRO Mobile to access current project information and manage quote / job work in real time. Field technicians can navigate to the **Times** page to view schedules for the current day and if they are assigned **Timesheet** module licence, they can update and create new time blocks, clock on and off and review the 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.

To navigate the **Times Report**:


- Use the drop-down arrow on the **Times Report** to view the report bar graph.
- Use the arrows besides the date range to view the report for a different week.
- The letters on the X axis represent abbreviations for days of the week. Tap 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**.

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 with assigned **Timesheet** module licence:

- 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 timestamp your start and finish times for the day, tap **CLOCK ON** or **CLOCK OFF** respectively.
- For two time blocks with conflicting times, tap the  icon to resolve the times.

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

How to Complete a Scheduled Job

Enterprise Only

Overview

Use the **Service** module in field to access current project information and manage quote / job work in real time. Field technicians can easily enter clock in and clock off times, parts used, view / upload linked documents, and email job cards when the job is complete.

Manage scheduled jobs

To access the scheduled and assigned jobs in the **Schedule**, tap the relevant job. The cost centre overview details the customer, site, scheduled time and job / cost centre description. If no site address exists in simPRO, the corresponding field appears blank.

- For project type jobs, the section name is displayed and you can access other cost centres on the job from the Job Overview.
- For a job that is due and assigned, tap the job to view the **Job Overview** rather than a specific cost centre. You can then choose a cost centre to continue processing the job.


Note that here the date appears in the DD Month YYYY format.

To manage a scheduled or assigned job:

1. Tap **START TRAVEL**. This updates the mobile status as **TRAVELLING** and creates a time block for the travel time in the job card. You can record the travel time only for the current date. Additionally, if you start recording time at night on the current day and the work continues after midnight, then two time blocks are created, one for each day. You can also choose to tap **START WORK** without recording a travel time block.


- If you attempt to record two time blocks simultaneously, a warning message is displayed. You can **Go to running time block**, **Discard running time block**, or **Cancel** the message.
2. Tap **TRAVEL START** or **TRAVEL END** to record the travel time block.
 3. Select an appropriate scheduled rate for the travel time to **Record time as**.
 - When you submit this job to simPRO, the travel time is recorded as a separate time block for the job with the set schedule rate.
 4. Tap **START WORK** to stop recording travel time and start recording a new time block for the actual work time on site. This updates the mobile status as **ONSITE**.
 - The start / end travel time is calculated based on recordings in real time and the **Schedule Format** and **Time Block Threshold** set in the **System Setup** in simPRO.
 - **Start** and **End** times of recorded time blocks can be manually adjusted from **Time Recorded**.
 5. Select an appropriate scheduled rate for the work time to **Record time as**.
 6. Tap **PAUSE WORK** to temporarily stop recording time against the job. Unlike **STOP WORK**, pausing work does not prompt for job card approval. To resume, you can tap **START WORK** or **START TRAVEL**.

Note that **PAUSE WORK** cannot be used to submit a job.


To use **PAUSE WORK**, you must have at least one **Mobile Status** set up in simPRO for paused work. In simPRO, go to **System**  **> Setup > Mobile >**

simPRO Mobile > Statuses. Open or **Create Job Status**, select **Pause** under **Time Tracking** and click **Save**. This enables you to **PAUSE WORK** in simPRO Mobile.

The scheduled time block is not updated with an actual time in simPRO until a status is selected and submitted through the Service module in simPRO Mobile.

7. You can use the icon  to open the default map application for the site.

Use the email icon to open the respective application with the corresponding details auto-populated from the customer card. Tap **More Contacts** to view additional contact details.

Tap **All Contacts** to list the available contact information, including all of the site and customer contacts. Tap  for the required contact and

choose from the following options:

- Tap **Call** to open the default phone application with the contact number populated.
 - Tap **Message** to open the default phone messaging application with the contact number populated.
 - Tap **Copy number** to copy the phone number to your device and paste it in another location.
8. View the **Work Description** added in simPRO.
 9. Check other technicians scheduled to the job on the current day. If you are online, tap the technician to view the time and cost centre they are scheduled to for this job. If you are offline, only the names of other technicians are visible.
 10. Next, complete pre-audits, view notes, manage attachments, and understand the scope of works.
 - Tap **PRE-AUDIT** to complete the safety audits or risk assessment check lists defined in your simPRO build.
The **Pre-Audits** display the **Required** and **Optional** audits. Select from **Safe Work Method Statements, Job Safety Analysis** and **Quality Assurance** to locate the relevant audits. Toggle **Show required audits only** and complete all the mandatory questions. Additionally, you can navigate to previous questions and edit answers, if required.

- Tap **NOTES** to view **Customer notes**, **Site notes** and **Schedule notes** added in simPRO.
 - Tap **ATTACHMENTS** to view any existing and upload new **JOB** and **SITE** attachments depending on the assigned security settings. Attachments are organised using the folder structure created in simPRO. Tap **ADD** to upload new job or site attachments. You can select to **Take Photo** or upload an image from the **Gallery**. You can upload up to 10 attachments at a time. Users can delete or rename attachments through simPRO Mobile only if they have uploaded the respective attachments either through simPRO mobile or simPRO.
 - Images taken through simPRO Mobile are compressed.
 - Tap to expand and view **Scope of Works**. This includes service fees, pre-builds, catalogue items, one off items, the **Estimated** quantity and whether the items are **Billed** to the customer.
 - Learn more in [How to Set Up Audits](#).
11. Expand the **Your Jobcard**. Note that the **Your Jobcard** section is available for editing only when **START WORK** is active.
- Add notes for the **Work Completed** and general **Technician Notes** for your reference. Tap **INSERT SCRIPT** to add default notes created in the simPRO **System Setup**. If you invoice a job in simPRO Mobile, you can select the **Work Completed** notes as a script in the invoice description. Learn more in [How to Use Scripts](#).
 - Tap **Time Recorded** to edit and update your time blocks from within each cost centre on the job.
 - You can add time blocks for other employees or plant Items by accessing the job through the **Timesheet** module.
 - You can add further billable labour rates from the **Quote and Sales** module. Learn more in [Build Options](#).
 - Under **Materials** view a list of catalogue items added to the job including any catalogue items contained in pre-builds. Toggle to **Hide**

unused to display items that are used on the job. Increase or decrease the quantity of the listed items, as required.

- **Add materials** from **STOCK** or **CATALOGUE**, if additional items are required.
 - You can add pre-builds, one off Items and service fees from the **Quote and Sales** module. Learn more in [Build Options](#).

12. Tap **Purchase Orders** to view existing purchase orders, add notes, or if you are online, create a purchase order. Learn more in [How to Create a PO Number](#).

13. The **More information** section describes other job details and work completed notes recorded on site.

- Tap **Job Overview** to view the site location, customer details, job name and number, a list of cost centres with their corresponding mobile statuses, **Order Number**, **Job Description** and customer and site notes. Tap a cost centre name in the list to navigate to the respective cost centre overview. If the job is previously invoiced, the invoice can be accessed from the Job Overview.
- Tap **Site History** view all work completed notes previously added by technicians for any jobs completed on the site. Note that the site history displays job name instead of cost centres for easy reference.

14. Complete any relevant tasks in the **Cost Centre Tasks** section or **View All Project Tasks**.

- Tap the **Refresh** icon to download updates to tasks or download any new tasks. Learn more in [Manage Tasks in a Job](#).

15. When you finish all works for the job, tap **REVIEW AND FINISH**.

Complete a scheduled job

After you **REVIEW AND FINISH** a job, a detailed summary is displayed.

Review your Job Card to confirm the **Materials** and **Labour** and tap **EDIT JOB CARD** to navigate back and update details, if required. Next, complete the **POST-AUDITS** assigned for the job.



If you have a scheduled or actual timeblock you can opt to toggle off submitting the recording timeblock. This is significant for technicians who need to complete a job card and submit a job retrospectively.

To sign off and process a completed a scheduled job:

1. Enter your name and tap **TECHNICIAN SIGN-OFF**. Add your signature in the **Sign below** box and **Save**.
2. Enter the **Customer** name and capture the signature. You can select from all primary contacts, customer contacts, and site contacts or enter the customer's name manually. If the job has been previously invoiced, the invoice can be accessed.
3. Tap **POST-AUDITS** and complete the mandatory post audits. Learn more in [How to Set Up Audits](#).
4. Select a mobile status from the drop-down list to assign it to the job. Note that the **Completed** status is not available if the required post-work audits are not successfully completed.
5. Toggle on **Email Job Card** to send the job card as an email attachment to the customer. You can select from all primary contacts, customer contacts, and site contacts available.
6. Toggle on **Continue to Invoicing** to proceed to invoice and apply payment to the job after it is completed. Learn more in [How to Invoice a Job](#).
7. Next, tap **STOP WORK AND FINISH**.

If you tap **Back** after collecting signatures, these signatures are lost and you need to capture the signatures again.

Manage times for other technicians and plant items

1. Access the **Service** module, and tap to access the relevant job.
2. Tap **START WORK** and expand the job card section.
3. In the job card section, tap **OTHER TECHNICIAN & PLANT ITEMS**.
4. On the **Edit times** page, tap the  icon to search and locate the required technician or plant.
5. Select the required **START** time and **STOP** time.
6. To **Record time as**, select a schedule rate and tap **OK**.
7. Tap **DONE** to save the time block.
8. You can enter **WORK NOTES** on behalf of the technician and tap **DONE**.
9. Tap **+TIME BLOCK** to add additional time blocks for the same technician.
 - Or, tap the  icon to add time blocks for another technician or plant.
10. After you add the time blocks for all the required technicians and plant items, tap **SUBMIT**. The time blocks are added to the schedule in simPRO immediately. Overlapping time blocks for the same technician or plant item are merged.
11. When you finish all works for the job, tap **REVIEW AND FINISH**.
12. Refer steps to complete a scheduled job until you **STOP WORK AND FINISH**.

How to View Assets

Enterprise Only

Overview

Using the **Assets** feature in simPRO Mobile, technicians can test assets and record the test results while completing a quote / job in the Service module. Technicians can scan asset barcodes and QR codes in simPRO Mobile saving the search time when testing assets. Technicians can view test history for each asset, including the test results, readings, failure points, recommendations, and notes, and also reuse these details for the current asset when testing for the same service level.

View and access assets

When you open a quote / job in the Service module, the total number of assets in the cost centre are displayed along with a breakdown of the total number of **Untested, Passed** and **Failed** assets.

If the quote / job has multiple cost centres, tap **Quote / Job Overview** to display the number of asset across all cost centres.



To begin working on an asset maintenance quote / job in simPRO Mobile, follow the initial instructions in [Manage scheduled jobs](#) until you tap **START WORK**, complete pre-audits, view notes, manage attachments, and understand the scope of works.

You can view the list of assets on a quote / job without tapping **START WORK** or completing any required **PRE-AUDITS**. However, to record new test results or add additional assets, you need to tap **START WORK** and complete the mandatory **PRE-AUDITS**.



Tap **ASSETS** to view the assets added to the cost centre. The **Assets** page displays a list of assets with different navigation and filter options. You can start

testing individual assets, choose to pass all untested assets and also create new assets.


Following navigation options are available on the **Assets** page:

- Use the search bar to manually enter asset ids / custom fields to locate an asset from the list.
- Use the  icon to search for an asset using the barcode / QR scanner.
 - You must have a barcode / QR code saved against the relevant asset in simPRO.
 - You can search for any asset added to the site, quote / job or cost centre using the search bar or scanner.
 - If you search for an asset that is on the site but is not added to the quote / job, tap **ADD** and start testing it, if required.
- Choose to **List All** assets, or only the **Untested**, **Passed**, or **Failed** assets, as required.
- Tap the  icon and toggle on to **List by asset type** or walk order and use the drop-down to filter the list based on the available asset types.

Edit asset details

Tap the  icon to expand an asset and view details including the custom fields and service levels .

To update an asset's details:

1. Tap **OPEN** in the expanded details view.
2. View the **Asset details** and tap the edit icon.
3. Update the asset details, as required.
 - Tap the  icon to scan and record a new barcode for the asset.
4. Tap **SAVE** to update the asset.

How to Test Assets

Enterprise Only



Overview

Using the **Assets** feature in simPRO Mobile, technicians can test assets and record the test results while completing a quote / job in the Service module. Technicians can scan asset barcodes and QR codes in simPRO Mobile saving the search time when testing assets. Technicians can view test history for each asset, including the test results, readings, failure points, recommendations, and notes, and also reuse these details for the current asset when testing for the same service level.


Record test results



You can access assets on a quote / job and record the corresponding test results in the Service module.

To begin recording asset test results, follow the instructions below:

1. Locate the asset and go to **Asset test results** page. To view the **Asset test results** page, you can:
 - Tap the asset name.
 - Or, tap **TEST ASSET** when you expand an asset's details.
 - Or, tap **+TEST** beside the required asset.
2.  Tap **CHANGE** to edit the **Service level**.
3. Tap **PAST RESULTS** to view previously recorded results for the asset. For each test performed, you can view the test result, date of test, technician who performed the test, any notes added and the service level . A maximum of five test results are displayed on the **PAST RESULTS** page. Tap **SHOW MORE** to display older test history.

Tap **DETAILS** to view the **Quote / Job number, Quote / Job name, Cost**

centre number, Test readings, Test results, and Failure points and recommendations .

4. If you are testing the asset on the same service level, tap **USE RESULTS** to reuse the same data as the test results for the current quote / job, including the **Failure points and recommendations** , if any.
5. Alternatively, go back to the **Asset test results** and complete the **Test results**, as applicable.
6. Tap to record whether the asset **PASSED** or **FAILED** or leave the asset as **UNTESTED**.
 -  If you select **FAILED**, choose **Failure Points and Recommendations**.
7. Enter supporting **Result notes**, as applicable.
8. To finish testing the asset, tap **DONE** to return to the list of assets.
 - You can use the barcode / QR scanner to scan the next asset to be tested.
 - Tap **SKIP** to continue to the next asset without recording any results for the current asset.
 - Tap **NEXT ASSET** to continue recording results for the next asset in the walk order.



On the **Assets** page, tap **PASS ALL UNTESTED ASSETS** to pass all untested assets in the open cost centre at the same time. Click **Ok** to confirm.

When you tap **PASS ALL UNTESTED ASSETS**, all assets that require mandatory test readings are listed with the pending readings in red. Additionally, the specific readings that require results appear in red inside the asset. You can continue populating test readings for the highlighted assets, as applicable.

Create new assets

To create a new asset in the job:

1. Tap **+ NEW ASSET** on the **Assets** page.
2. Select a relevant **Asset type** and the **Walk order** number.

3. Enter **Specific asset information** in the custom fields, as required.
4. Tap the  icon to scan a new barcode or QR code for the asset.
5.  Toggle on and add **Service levels** to the asset.
 - Select an individual service level to use when testing the asset for the current day.
 - The service levels available for selection are pulled from the service levels assigned to the asset type in simPRO.
 - Alternatively, select **No service** if you do not need to service it on the current day.
6. When you finish creating the asset:
 - Tap **TEST** to record the asset test results for the current day.
 - Tap **COPY** to save the current asset and create a new asset using the same details.
 - Tap **NEW** to save the current asset and create a completely new asset.
 - Tap **DONE** to return to the list of assets.

Complete the maintenance job

Once you complete testing assets, you must complete and submit the job for the results to be sent back to simPRO. Before you complete a maintenance job, you must complete post work audits and select a mobile status. And, make sure you complete the following before submitting the job, as applicable:

- Enter work completed information
- Record notes
- Adjust recorded time
- Add used materials
- Create purchase order numbers
- Add stock

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- Collect signatures
- Email the job card.

You can also continue to invoice the job and collect a payment, if required.

How to Complete a Scheduled Quotes

Enterprise Only

Overview

Use the **Service** module in the field to access current project information and manage quote / job work in real time. You can view the assigned and scheduled project quotes on the **Service Schedule**. However, only the service quotes are accessible for further processing.

To proceed with managing quotes, you should be assigned a mobility licence for the **Service** module in your employee card.

Complete a quote

1. Access the required quote from the schedule.
 - If the quote has multiple cost centres, this opens the quote overview.
Tap the cost centre to start working.
2. Tap **START TRAVEL** to start recording travel time and tap **START WORK** to stop recording travel time and start recording working time against the quote.
3. If any of your pre-audits are mandatory, you must complete audits at this stage.
4. If you need to stop working temporarily, and a pause mobile status has been set up in simPRO, tap **PAUSE WORK** to pause working time.
5. Next to **Record time as**: select an alternative schedule rate.
6. The **Status** displays the mobile status. This is updated when you start travel, start work, pause work and complete the quote.
7. Tap the **pin** icon to locate the address in the device's default map application.
8. Tap the **Work phone** icon or **Mobile phone** icon to open the device's phone application to call the contact.

9. Tap the **Email** icon to open the device's default email application to email the contact.
10. Tap **MORE CONTACTS** to view customer and quote contacts.
11. Tap **Work description** to display the complete description.
12. Tap **PRE-AUDIT** to complete audits if required.
 - Tap the audit group.
 - Select the relevant audits.
 - Tap **NEXT**.
 - Select the relevant employees to complete the audits for.
 - Tap **START**.
 - Complete the audit questions.
 - Enter a Signature and tap **NEXT**.
 - Tap **DONE > DONE** to return to the quote page.
13. Tap **NOTES** to view notes for the:
 - Quote
 - Cost Centre
 - Customer
 - Site
 - Schedule
14. Tap **ATTACHMENTS** to view existing attachments for the **QUOTE** and **SITE**.
 - Tap the **+** icon to upload an image from your phone's **GALLERY** or **TAKE PHOTO**.
 - Tap the edit icon to rename the attachment names prior to uploading them.
 - Tap the cloud icon to upload the images immediately. Alternatively the images upload in the background if you navigate away.
 - Tap the back icon to return to the quote page.
15. Tap **ASSETS** to view assets, create new assets and perform maintenance testing.

16. Under **Your quote card**:
 - Tap the **edit** icon to update **Work completed** notes.
 - Tap the **edit** icon to enter **Technician** notes.
 - Time spent working on the quote is recorded automatically.
Alternatively, tap the edit icon to update **Your times recorded**
 - **ADD ANOTHER TIMEBLOCK.**
 - Update recorded time.
 - Enter **WORK NOTES** as required.
 - Tap **Back** to return to the quote page.
17. Under the **In the Quote** section is a breakdown of the cost centres organised into sections for project quotes.
 - Tap **+ADD** to create a new cost centre for this quote.
 - Tap the **X** to delete one of the cost centres.
 - Note that you cannot delete the cost centre that you are currently in.
 - The **green clock** icon appears next to a cost centre that you're recording time for.
18. Tap a cost centre and tap to **CHANGE** the cost centre as required.
19. Update the **Cost centre name** and **Section** names for project quotes as required. You can also **Insert Script** or manually enter a **Description** as required.
20. Tap **Material/Labour**.
21. Tap **Pre-build, Catalogue, Stock, One off items** or **Service fees**. Open the relevant group and subgroup and use the **+** and **-** to alter the quantity of items on the job. Then tap **DONE** to assign the items.
22. Tap **Labour** and select **Labour Rates**. Then tap **DONE**.
23. Tap **Cost Centre**.
24. Toggle off **Auto Calculate** to manually enter times for labour rates. Tap a labour rate, enter a **Time** in hours and tap **DONE**.

25. To change totals and subtotals:
- To adjust the tax rate, tap the **edit** icon next to **Tax** and update the tax rate as required.
 - To add a discount or fee, tap the **edit** icon next to **Discount/Fee** and tap **Adjust Price**. Enter the **Discount / Fee**, tap **Update** and the discount / fee is calculated and applied to the subtotal.
 - To directly adjust subtotal, tap the **edit** icon next to **Subtotal**, enter a new subtotal and tap **Update**.
 - To directly adjust the total, tap the **edit** icon next to **Total (Inc Tax)**, enter the new **Total**, and tap **Update**.
 - Note that if you modify the **Subtotal** or **Total** after applying a **Discount/Fee**, the **Discount/Fee** percentage is applied to the new **Subtotal** rather than the **Discount/Fee** value. If you intend to adjust the totals and apply a **Discount/Fee** that equals a certain value you must update the **Totals** first.
26. Tap **DONE** to complete the cost centre. Tap to update additional cost centres as required.
27. To access tasks, you may need to return to the quote overview. Tap to expand cost centre tasks or tap to **VIEW ALL PROJECT TASKS**.
28. Tap a task. Set the **Status** and the % **complete** or toggle to **Set the task as complete** and select the **Completed Date**. Tap the edit icon to update the **Description** manually or **Insert Script**, then tap **DONE**. Tap the edit icon to update the **Notes** manually or **Insert Script**.
29. Tap **DONE > DONE** to complete the task.
30. If the quote has been built so that all of the cost centres are likely to be accepted by the customer tap **BILL ALL OPTIONS**. Alternatively, if the quote has been set up with cost centres that are to be presented to the customer for them to choose between tap **PRESENT OPTIONS**.

Bill All Options

1. Tap **Show details** to expand a cost centre and display or edit individual items.
2. Tap **Email quote** to send a copy of the quote to the customer as a PDF. **Add email** as required, the customer's default email contact is added automatically. Tap **Form** and select a different quote template as required. Enter a **Subject** and a **Message**, alternatively if these fields are left blank they are pre-populated with the default subject and message for quotes from simPRO. Tap **SEND**.
3. If the customer accepts the quote toggle **I (the customer) accept this quote**, enter an **order number** if required and tap **CUSTOMER SIGN-OFF** to record their signature.
4. Tap **CONTINUE**.
5. Toggle off **Include current recording time block** to discard the currently recorded time.
6. Tap **EDIT QUOTE CARD** to return to the Quote page and make adjustments as required.
7. Tap **POST-AUDITS** to complete the relevant post work audits.
 - If there are mandatory post audits you need to complete them before you can finish work.
8. Tap **Please choose a mobile status** and select a mobile status.
9. If the quote is accepted by the customer toggle to **Convert this quote to a job** and tap **STOP WORK AND FINISH**.

Present Options

1. The **Presentation** page displays each cost centre, including any savings that the customer is receiving based on add-on pricing and memberships.
2. Tap **Show details** to expand a cost centre and display or edit individual items.

3. Clear any cost centres that aren't accepted by the customer.
 - Any cost centres that aren't selected are discarded when the quote is submitted to simPRO.
4. Tap **PROCEED**.
5. Tap **Email quote** to send a copy of the quote to the customer as a PDF. **Add email** as required, the customer's default email contact is added automatically. Tap **Form** and select a different quote template as required. Enter a **Subject** and a **Message**, alternatively if these fields are left blank they are pre-populated with the default subject and message for quotes from simPRO. Tap **SEND**.
6. If the customer accepts the quote toggle **I (the customer) accept this quote**, enter an **order number** if required and tap **CUSTOMER SIGN-OFF** to record their signature.
7. Tap **CONTINUE**.
8. Toggle off **Include current recording time block** to discard the currently recorded time.
9. Tap **EDIT QUOTE CARD** to return to the Quote page and make adjustments as required.
10. Tap **POST-AUDITS** to complete the relevant post work audits.
 - If there are mandatory post audits you need to complete them before you can finish work.
11. Tap **Please choose a mobile status** and select a mobile status.
12. If the quote is accepted by the customer toggle to **Convert this quote to a job** and tap **STOP WORK AND FINISH**.

How to Schedule an Activity




Enterprise Only

Overview


Use the **Service** module in field to access current project information and manage quote / job work and schedule activities in real time.

Schedule Activity

To schedule an activity, for the current day:

1. Tap  > **+ACTIVITY** to schedule a new activity for the current day or any other day as defined at the top of the **Service Schedule**.
2. All the activities set up in simPRO are available under **Choose an Activity**. Search for the relevant activity from the list. Alternatively, if the activity is already scheduled on the selected day, the corresponding **Scheduled time block** is displayed on the **Activity Times** page. Under **Activity Times**, you can create time blocks and submit to simPRO.
3. Tap **START RECORDING** to record actual time for the activity 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**.
 - 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.

4. 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**.
5. Next, tap **Record time as** and select the required scheduled rate to apply the recorded time against it.
6. Tap **NOTE**, to record work notes in the activity time line.
7. Tap **DONE** to create the activity time block.
8. **ADD ANOTHER TIME BLOCK**, if required or click **SUBMIT** to send the time blocks to simPRO.
9. If you are scheduling a new time block for an activity, you are directed back to **Choose an Activity** to schedule additional activities, as required. Tap back to return to the **Schedule**.
Alternatively, if you are re-scheduling times for an existing scheduled activity, or adding new time blocks for a scheduled activity you are directed to the **Schedule**.


If you are scheduling an activity for a future day, on the **Schedule** select the relevant date. And, tap  > **+ACTIVITY**. Next, tap **ENTER TIMES** and define a

time block. 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.

How to Clock On / Off

Enterprise Only

Overview

Using **CLOCK ON** / **CLOCK OFF**, record a timestamp 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.

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 schedule, this feature is unavailable.

Record time gaps

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.

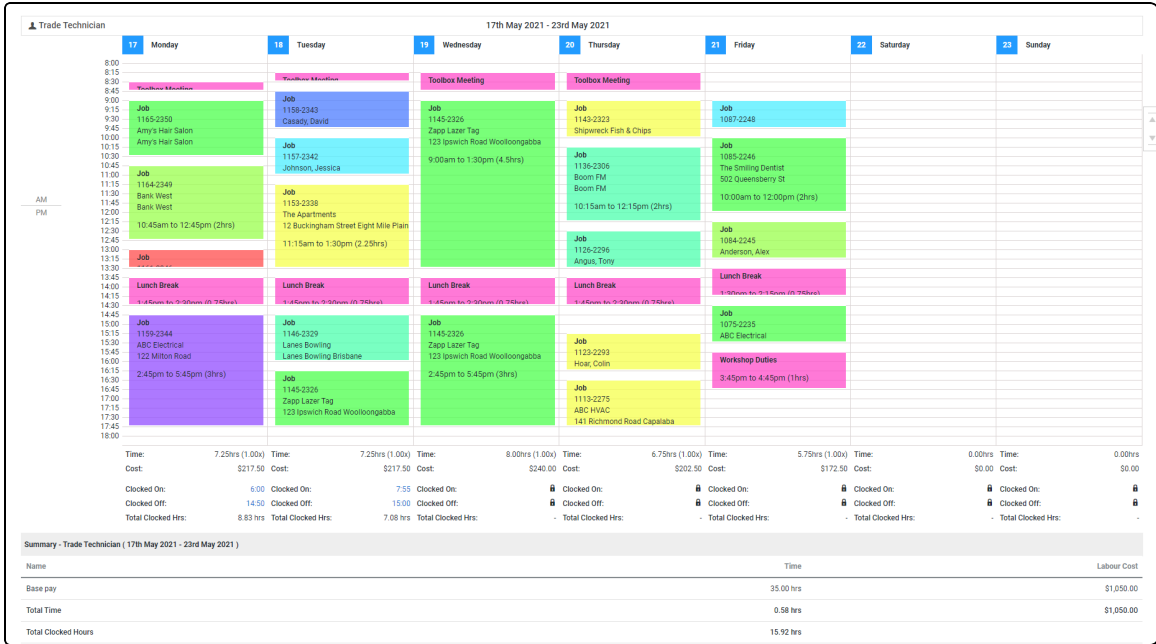
The **Clock off time** warning message lists the following information:

- **Record all as:** Records all empty and available time slots between the **CLOCK ON** and **CLOCK OFF** timestamps 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** timestamps 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 timestamps.

View recorded clocked time

When you tap **CLOCK ON**, 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**.

If a technician has made a mistake when recording their clock on / clock off time, a simPRO admin user can edit the time in simPRO. Learn more in [Generate a timesheet](#).

How to Invoice a Job

Enterprise Only

Overview

The invoices and payments feature in simPRO Mobile enables technicians to add and edit billable items, create an invoice, email it to customers / site contacts, and receive a payment in the field.

Once technicians complete their jobs in the Service Module, they can continue to invoice and apply payments in the same workflow. This ensures a streamlined process, reducing the additional time required for processing payments later in simPRO.

Create an invoice

Invoicing in simPRO Mobile enables you to update each cost centre and add / manage your billable items prior to creating the invoice.

After you tap **STOP WORK AND FINISH** in the Service Module, you can proceed to invoicing.

If **Category Tracking** is enabled in your simPRO build, select the relevant accounting **Category** from the drop-down list.

All cost centres are displayed on the invoicing page, including any variations. For a project job, the cost centres are organised into sections. You can adjust items listed in the cost centres and resolve any warnings for mismatch between the billed hours and the hours worked before billing the customer.

Note that invoicing is not available for jobs that are either open in simPRO or have retentions applied.

← Cost Centre #693
DONE

Type of cost centre Installation

Cost centre name
Air Conditioning Installation

Description

↶ ↷ Insert Script
B I ~~S~~
A ▾
☰ ▾ ☷ ▾ ☰ ▾ ☷ ▾
I_x
☰ ☰ ☰ ☰
10pt

The following works were completed

1. Installation
2. Testing
3. Fixtures
4. New parts ordered

OL » LI 18 WORDS

Materials

4 x 403593 12mm Jumper Tap Valve - 6 Pack	\$12.88 ✕
1 x RXZ25NV1B Daikin Airconditioning Unit S/S Package Installation	\$5,995.00 ✕
1 x 1313AXD Air conditioner fan belt	\$40.37 ✕
1 x Rental Machinery	\$214.28 ✕

Labour

Auto calculate

Calculated labour \$0.00

Total **\$6,262.53 Inc Tax**

Includes savings of \$0.00

Cost Centre
 Materials/Labour

To create an invoice:

1. Tap the relevant cost centre to add, remove or adjust billable items. Note that a cost centre is not available for editing if, it is:

- Locked
 - Has discounts or fees applied,
 - Is partially or fully invoiced
2. On the **Cost Centre** page, update the **Cost centre name** as you require it to appear on the invoice.
 3. Tap **INSERT SCRIPT** to use a pre-written description or enter a cost centre **Description** manually. Learn more in [How to Use Scripts](#).
 4. Billable materials added to the job are listed under **Materials**. Tap individual items to view corresponding details, apply **Add-on** pricing, or adjust the quantity. Tap the **delete** icon to remove items from being billed to the customer.
 5. Toggle on **Auto calculate** under **Labour** to automatically bill the customer based on the labour associated with materials.
 6. Toggle off **Auto calculate** and tap the labour rate to adjust the billable labour time manually. If there is a mismatch between the billed hours and the hours worked, tap **BILL HOURS WORKED** to automatically update the billed labour to match the actual hours worked.
 7. Tap **Materials/Labour** to add **Pre-builds, Catalogue, Labour rates, One Off Items** and **Service Fees**.
 8. Navigate to the relevant group and sub-group and add items to the cost centre, as required.
 - For **Catalogue** items and **Pre-Builds**, tap **View details** to apply **Add-on** pricing, adjust quantity and **ADD** items. For **Pre-Builds**, view supporting materials, if any.
 9. You can **View details**, adjust quantities, and apply **Add-on** pricing to catalogue items / pre-builds. You can also view supporting materials for pre-builds, if any.
 10. Next, go back and tap **Cost Centre**.

11. To change totals and subtotals:

- To adjust the tax rate, tap the **edit** icon next to **Tax** to change the tax rate as required.
- To add a discount or fee, tap the **edit** icon next to **Discount/Fee** and tap **Adjust Price**. Enter the **Discount / Fee**, tap **Update** and the discount / fee is calculated and applied to the subtotal.
- To directly adjust subtotal, tap the **edit** icon next to **Subtotal**, enter a new subtotal and tap **Update**.
- To directly adjust the total, tap the **edit** icon next to **Total (Inc Tax)**, enter the new **Total**, and tap **Update**.
- Note that if you alter the **Subtotal** or **Total** after applying a **Discount/Fee** the **Discount/Fee** percentage is applied to the new **Subtotal** rather than the **Discount/Fee** value. If you intend to adjust the totals and apply a **Discount/Fee** that equals a certain value you must change the **Totals** first.

12. Tap **Done** to confirm all updates to the cost centre. You can continue to update other cost centres, if required.

13. Next, tap **CREATE INVOICE**.

- Note that the invoice created is a tax invoice for the entire or remaining price of the job.
- Partial invoicing or invoicing per item is not currently available in simPRO Mobile.

Invoice components

The invoice page displays the following:

- Invoice number
- Customer name
- Job number

- Description
 - Note that the **Work Completed** notes that you enter in the job card are saved as a script. Tap **Insert Script** to populate the same notes as **Description** on the invoice.
- Amount Invoiced section details the different components of the **Invoice amount** including the **Already Invoiced** and **Tax** figures.

Toggle on **Continue to payments** on the invoice page. If you choose to toggle on **Email Invoice**, a copy of the invoice is sent to the customer after the payment is processed. All customer invoice contacts are auto-populated as email recipients. You can also select any additional customer / site contacts or manually enter their email addresses. Tap **Continue** to begin processing payments for the invoice.

How to Apply Payments

Enterprise Only

Overview

The invoices and payments feature in simPRO Mobile enables technicians to add and edit billable items, create an invoice, email it to customers / site contacts, and receive a payment in the field.

Once technicians complete their jobs in the Service Module, they can continue to invoice and apply payments in the same workflow. This ensures a streamlined process, reducing the additional time required for processing payments later in simPRO.

Apply payments

When you create an invoice in simPRO Mobile, you can apply payments to the job.

Toggle on **Continue to payments** on the invoice page. If you choose to toggle on **Email Invoice**, a copy of the invoice is sent to the customer after the payment is processed. All customer invoice contacts are auto-populated as email recipients. You can also select any additional customer / site contacts or manually enter their email addresses. Tap **Continue** to begin processing payments for the invoice.

To record payments:

1. **Choose a Payment Method** from the drop-down list to proceed.
 - If Square Payments is integrated with your simPRO build, and the **Square Point of Sales** app is installed to your device, you can process card payments through the Square-simPRO Mobile integration. Select the Square payment method from the drop-down list.

- Depending on the payment method selected, any corresponding **Finance charge** and **Payment total** values are populated.
2. Adjust the payment amount as percentage or enter a value in dollars, to make a partial payment.
 3. Enter reference **Notes** which appear in simPRO on the corresponding payment.
 4. Tap **RECORD PAYMENT**.
 - Note that the physical payments for the amount recorded have to be received externally. For example, payments by cash, direct deposits, or external EFTPOS reader.
 - If you select a Square payment method to process a card payment using your square reader, tap **PROCESS PAYMENT** to launch the Square Point of Sales app. Then, select the payment type in Square and tap or insert a card using the Square reader.

If you are not logged in to Square when receiving a payment or if your location is set incorrectly, you receive a warning message which enables you to either login or rectify your location. On iOS devices a warning message is displayed to let you know that are not logged in to Square.

- Select an option for the Square payment receipt to continue in simPRO Mobile.
 - The payment success or failure message is displayed on invoice page. If the payment fails, you can process the payment again.
5. Tap **DONE** to finish recording the payments and send the paid invoice to the customer.

Stock

How do I create a purchase order for stock?

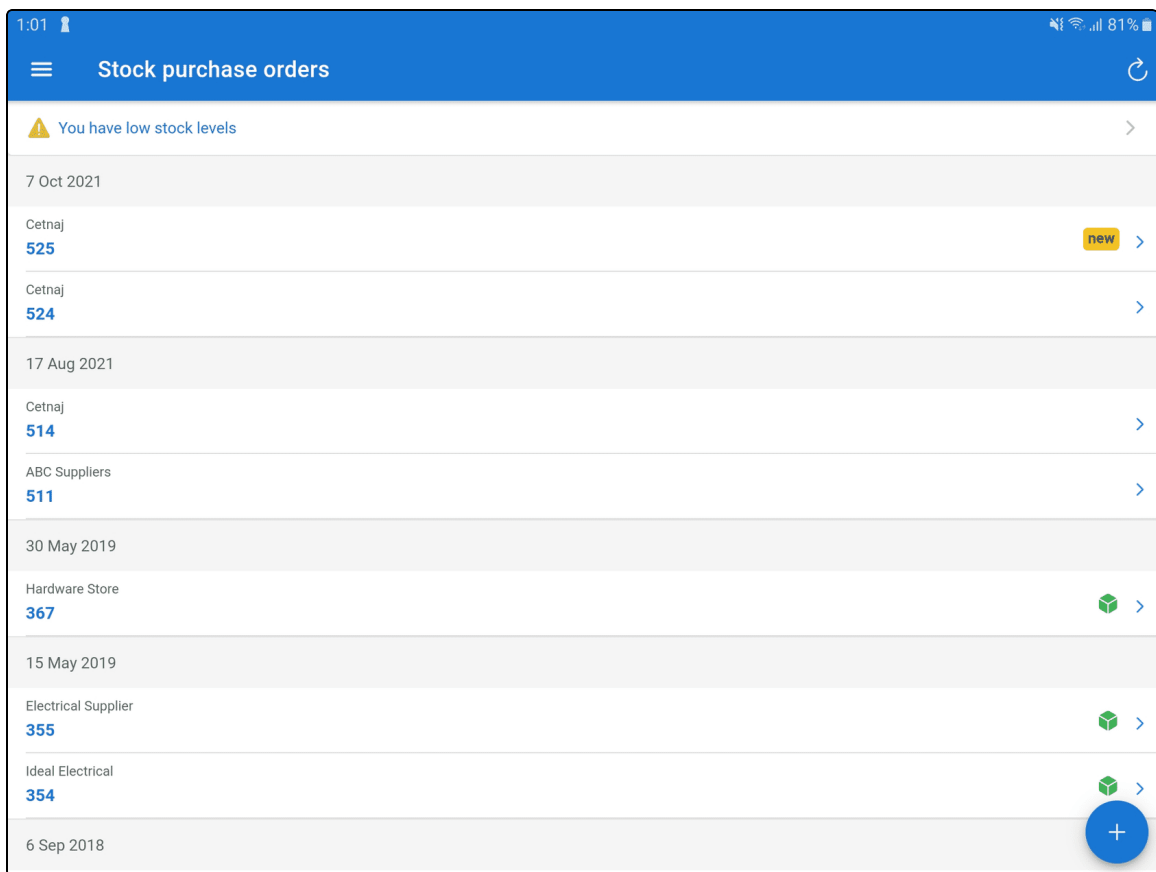
How do I update a purchase order?

How to Create a Purchase Order


Overview


In simPRO Mobile, you can use either the **Stock** module or the **Service** module to create purchase orders and add catalogue items in the field.

Create a purchase order in the Stock module



To create a purchase order in the **Stock** module:

1. Go to the **Stock** module.
2. Tap  to create a new purchase order or tap an existing purchase order.
3. Tap to select a supplier.
4. To select the storage device, tap **Add materials to**.



5. Tap **+** **Add** and search for specific items.
 - The items specific to the supplier are displayed.
6. Tap  next to an item to add it to the order or manually enter a quantity.

Add more items, as required and tap **Done**.
7. Tap the item to adjust the **Quantity** of the item and tap **Done**.
8. To add materials to another storage device, tap **Add materials to**.
9. Tap **Back**.

Note that purchase orders created in simPRO Mobile must be approved in simPRO before they can be marked as received or invoiced. Learn more in [How to Update a Purchase Order](#).

All purchase orders created in the Stock module are assigned to stock, rather than a specific job.

Create a purchase order in the Service module

1. Go to the **Service** module and access the relevant job.
2. Tap **START WORK**.
3. Tap **PURCHASE ORDERS**.
4. Tap  to create a new purchase order or tap an existing purchase order.
5. Tap to select a supplier.
6. Tap **+** **Add** and search for specific items.
 - The items specific to the supplier are displayed.
7. Tap  next to an item to add it to the order or manually enter a quantity.

Add more items as required and tap **Done**.
8. Adjust the **Quantity** of the item and tap **Done**.
9. Tap **Done**.
10. Tap **Back** twice.

When goods are received to a job, they are not immediately displayed in the **Materials** section of the job in simPRO Mobile. To return to the schedule, tap

Back. Allow simPRO Mobile to refresh, then tap the **clock** icon to return to the job with the materials added.

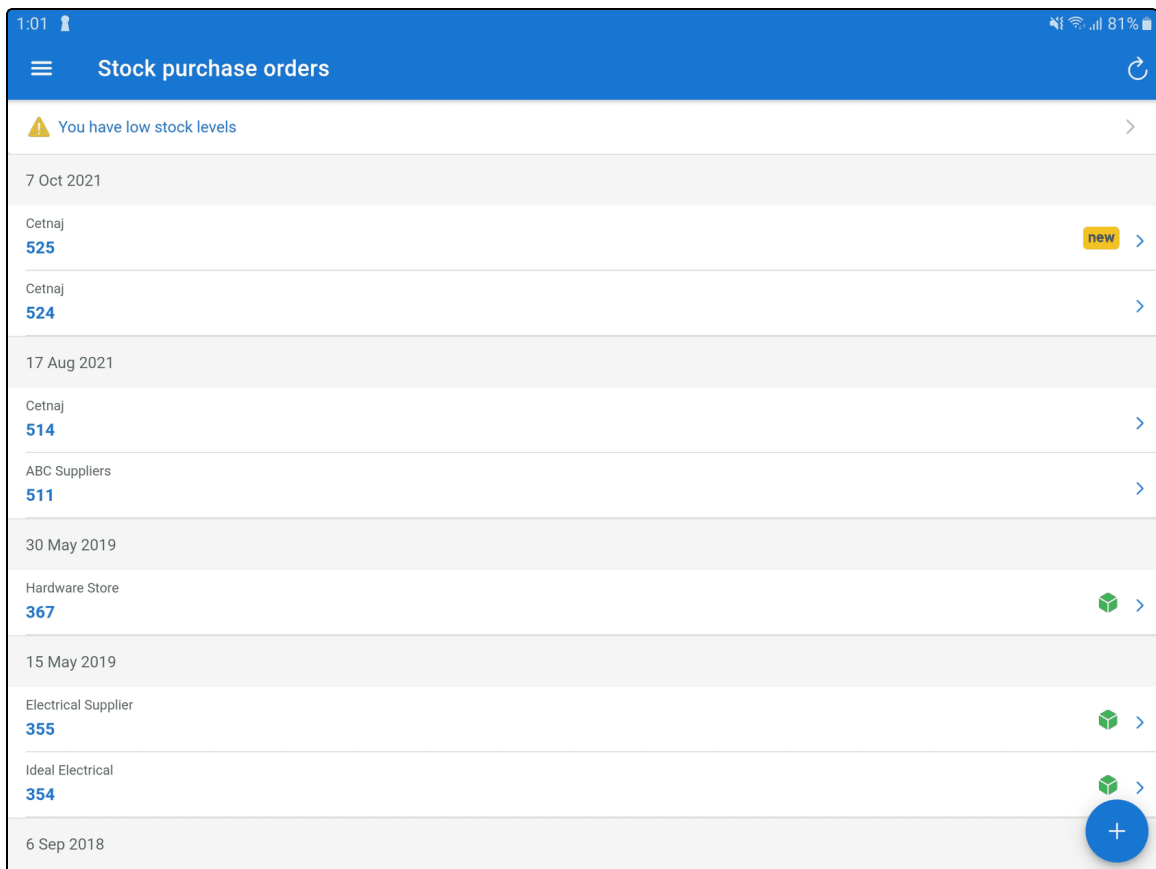
Note that purchase orders created in simPRO Mobile must be approved in simPRO before they can be marked as received or invoiced. Learn more in [How to Update a Purchase Order](#).

How to Update a PO Number

Overview



All of the purchase orders you have created and assigned to stock that are in the Pending or Received stage, can be easily accessed and edited in the **Stock** module. Alternatively, you can access purchase orders assigned to jobs in the Service module.

Update a purchase order




To update a purchase order in the **Stock** module:

1. Navigate to the **Stock** module.

- All purchase orders are listed chronologically and separated by date. For a purchase order to be listed it must meet the following requirements:
 - It was created by the logged in user, either in simPRO or simPRO Mobile.
 - The order is assigned to stock.
 - The order is currently in the Pending or Received stage.
 - Each purchase order can be identified by its number and supplier.
 - Purchase orders that have been created in the past hour are marked as **New**.
 - Purchase orders that have had the **Items Received** check box selected on the receipt in simPRO have a  icon.
- Each purchase order can be identified by its number and supplier.
- Purchase orders that have been created in the past hour are marked as **New**.
- Purchase orders that have had the **Items Received** check box selected on the receipt in simPRO have a  icon.

2. Tap on a purchase order to update it and view the following details:

- The purchase order number
- The **Date** the purchase order was created
- If the goods are received
- The **Supplier**
- The storage device that the stock is being received to
- The **Notes**
- Note that while you can view and update catalogue and description purchase orders you are not able to view the items or the description added to the order in simPRO.

3. If the items are yet to be received, you can update the storage device that the order is assigned to, as required. You can also add items to the purchase order:
 - Tap **+ Add**.
 - Search to locate specific items and tap  or enter a quantity next to the item to add it to the order. Add more items as required and tap **Done**.
 - Tap **Done**.
4. If the purchase order has been approved in simPRO, tap **Receive Goods** and enter a **Packing Slip number** to record items as received. Learn more in [Approve a purchase order](#).
5. Update **Notes** as required.
6. Tap **Save**.

