Setup and edit Staff Details from Administration/Staff:
- To edit existing Staff double click on a record or select edit on far right.
- To create new staff click **+NEW STAFF**.

1. Type in a First & Last Name.

2. Select the Employment Agreement & complete the No. Hours. The Status will auto populate with "New".

3. Select the correct Time Zone.

4. Add a Date of Birth if required. This will automatically calculate the Age.

   - If you set this a reminder will be sent to your administrator.

5. Use the 🗑 and ✏ buttons to add or remove a Signatures. **Note:** only image files can be loaded here.

   - The Signature is required when locking Policies & Procedures.

6. Use the 🗑 and ✏ buttons to add or remove & Photo. **Note:** only image files can be loaded here.



**Scroll down to User Settings:**
7. Enter a Username.
8. Type in a Password. This is also where you can reset an employee's password if they have forgotten it.
   Use the 👁 to view what you have typed.
9. Enter an Employee ID if required – field is optional.
10. Tick the box to "Enable" – untick the box when staff are no longer employed.
11. If the user requires access to the Web App tick "Is the User Admin?".
12. Last Login Date will populate once the user has logged on.
13. Select the appropriate **Security Level.**
14. Select a Direct Manager if required.
15. Select their Position – this field is compulsory.
16. If required select a **Division** and/or **State/District.** Multiples can be selected and clicking on the X will delete them.
17. When **simPRO** is configured user who will Get Jobs in the mobile app will need a SimproTechnicianID entered.

**Scroll down to the Address & Communication Settings section:**

18. Complete the address fields as required.
19. Add a Mobile number.
20. Tick the "Mobile Notification" if you want the user to receive SMS notifications.
21. Add an email address – this field is compulsory. The system uses this to email the user & create their account.



**Return to the top of the page and click 🖫 SAVE**

**On the Mob App select Profile from the Main Menu to see Personal Details.**

**NOTES:**

- Users can update their **Personal Details** and add a **Photo** on the Mob App.
- All changes are recorded in the Web App under **Change History** and send an email notification to the Administrator.