



General

- For SIMPRO jobs with no job name Safetyminder will populate the site name instead.
- Adding records to Administration/External Companies/Manufacturers only requires a Name, all other fields are now optional. This also applies if you add one from Registers/Administrative Registers/Purchasing Register.
- The team have been working on optimising queries to improve performance on the web app.

Home / Administration / Templates / Forms

A new mobile app workflow for job docs has been added, there is a new tick box for Sign On Lock in the form info page. Forms have widgets that need to be completed on the Lock Tab in the mobile app e.g. SWMS, Permits, COC etc. All other forms will be able to skip the lock step and go straight to sign off, see mobile app notes below. A script has been run on all databases to automatically tick this for template type SWMS and some other forms we know use these widgets. There may be some in your database that you will manually need to update. This option, along with the Needs Revision, have been added to the grid page.

Home

SAVE DELETE COPY

Title: Testing SWMS | Document ID: 0855 | Version Number: 1 | Template Status: Locked | Template Type: SWMS

Report Paper Type: A4 Portrait | Sub-Contractor Template | Need Revision | Documentation Only | Archive Template | Sign On Lock

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Document...	V...	Full Title	Type	Stat...	Archived	Sign On	Need Revi...	State / District	Division
0855	1	Swms Faranak Test for Hei-v1	SWMS	Locked	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	NSW,SA	Bathrooms,Foundations
AA-C04	2	Revision Form-v2	Checklists	Locked	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SA,ACT,NSW,NT,Q...	Bathrooms
AA-P002	3	CONFINED SPACE ENTRY-v3	Permits	Locked	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ACT,NSW,NT,QLD,...	Bathrooms
AA-SW01	2	SWMS Other-v2	SWMS	Locked	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	NSW	Bathrooms,Commercial

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Other changes on forms:

1. On the info page the breadcrumbs now show.
2. There are new remote data source which can be added do dropdown or data lists. They do not relate to any records in staff profiles. They are sourced from: Administration/Training/Management Courses

1 Home Administration / Templates / Forms / Issue 11361 11362 11359 / Edit

Title: Issue 11361 11362 11359

2 Data Source: Manual Remote

- Courses - ALL
- Courses - Training - ALL
- Courses - Training - First Aid
- Courses - Training - Fire
- Courses - Training - General
- Courses - Inductions
- Courses - Skills & Competencies

Home / Create Job Docs / Customers

We've added new fields and widgets for customers, if you are using Get Jobs with SIMPRO the data will be pulled thru.

- ABN - [CustomerABN]
- Contact Email for sites, with new widgets for [SiteContact], [SiteContactPH] & [SiteContactEmail].

Home / Create Job Docs / Customers SAVE DELETE BACK

Name: A1 Mowing Ltd Company Phone: Company Email: heidit@celoces.com

Street Address: 23 Jacob St Suburb / Town: Melbourne

State: VIC Post Code: 3000 SiteName: A1 Mowing Ltd

SimproClientID: 21912 Customer Status: Current Customer ABN: 39856322

Contact First Name: Jolly Contact Last Name: Roger Contact Mobile: +6132658955 Contact Email: heidit@celoces.com

Client Site Archived Search... ADD

Site Name	Sta...	Street ...	Subur...	Post C...	Contact	Mobile...	Email	Zone ...
23 Jacob St Melbourne	Current	23 Jacob St	Melbourne	30003025	Josh Broom	048936522	heidit@celoces...	

Home / Create Job Docs

When re-assigning job docs you can now search the staff list by typing in the Reassign to box.

Edit Item

Assigned To: Craig Smith-Mobile Reassign To: Matt

SAVE

Anne Aside
Herman ASpider
Matt BlancSMD

Mobile / Job Docs

When reassigning Job Docs you can now search for names:

1. Click in the Re-assign to field.
2. Type in the search box.
3. Tick required name.
4. Click **OK**.
5. Click **SAVE**.

SWMS

Search

NEW DRAFT LOCK SIGN OFF REVISION

Doc No:785, Job No:52966
E04 - INSTALLING CABLE AND LA...
Letters and more Signed Off
Craig Smith-Mobile
3 Kings Border - 3 Kings Hall
06 Nov 2024 (V1)

Doc No:683, Job No:52015
E04 - INSTALLING CABLE AND LA...

Choose Action

- Add Additional Signatures
- Add Staff to Read & Sign Off List
- Email the Form
- Job Completed
- Re-assign Job Doc

Re-assign

Assigned to: Matt BlancSMD

Re-assign to:

Staff

Fre

Fred Brown
 Fred BrownS

OK CANCEL

Re-assign

Assigned to: Matt BlancSMD

Re-assign to: Fred Brown

SAVE CANCEL

Mobile / Job Docs

Streamlined workflow for Job Docs:

1. Click Save, complete the job doc as normal
2. New buttons:
 - **SIGN OFF**: goes straight to SIGN OFF tab
 - **SIGN OFF & EMAIL**: goes to Email page
3. Select email and click **SEND AND CLOSE** or **CANCEL**.
Both then go to SIGN OFF tab.

NOTES:

- Some forms have specific widgets which will still need to use LOCK & SAVE SIGNATURES e.g. SWMS
- These will have Sign on Lock ticked in the Template Info Page, as per above, and will be updated automatically for this live release.

The screenshot displays a mobile application interface with four main panels:

- Left Panel (JSA_New):** Shows job details for Mountain Dew Ltd, including Doc No: 595, Job No: 220823, Job Name: Revision, Form: AA-J003 - JSA Expending Questions-v1, Assigned to: Kermit Frog, and Create Date: 07 Dec 2022. A red circle with the number '1' and a checkmark is positioned below this panel.
- Middle Panel (New Site For No Job):** Shows the '6. SIGN OFF' section with fields for Name (Kermit Frog), Signature (with a handwritten signature), and Date & Time (06/11/2024 15:10). Below this is the '7. COMMENTS/NOTES/PHOTOS' section with a photo of a sunset and a 'Delete' button. At the bottom, there are buttons for 'SAVE DRAFT', 'LOCK', 'SIGN OFF', and 'SIGN OFF & EMAIL'. A red circle with the number '2' is positioned below the 'SIGN OFF' button.
- Right Panel (Contacts):** Lists contacts for A1 Chicken Ltd, Lana Brown, and Kermit Frog. A red arrow points from the 'SIGN OFF & EMAIL' button in the middle panel to the 'ADD NEW EMAIL ADDRESS' button in this panel.
- Far Right Panel (Forms):** Shows a list of forms, including 'A1 Chicken Ltd - New Site For No ...' with a 'Signed Off' status. A red arrow points from the 'SEND AND CLOSE' button in the bottom right panel to this form entry.

At the bottom right, there are buttons for 'CANCEL' and 'SEND AND CLOSE'. A red circle with the number '3' is positioned below the 'SEND AND CLOSE' button.