V 2.7.11 Nov-24



Safetyminder

General

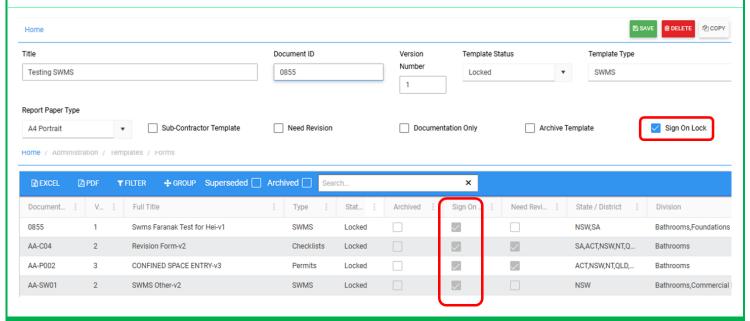
- For SIMPRO jobs with no job name Safetyminder will populate the site name instead.
- Adding records to Administration/External Companies/Manufacturers only requires a Name, all other fields are now optional. This also applies if you add one from Registers/Administrative Registers/Purchasing Register.
- 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.

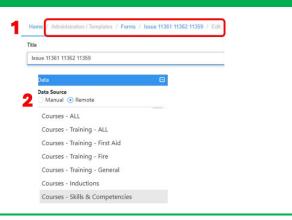


Home / Administration / Templates / Forms

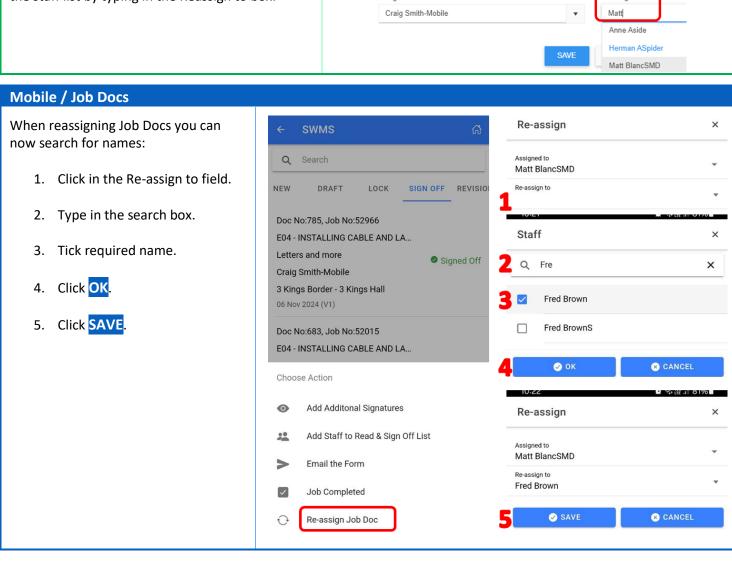
Other changes on forms:

- 1. On the info page the breadcrumbs now show.
- 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



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]. B DELETE D BACK Home / Create Job Docs / Customers Company Phone Company Email Name A1 Mowing Ltd heidit@celoces.com Street Address Suburb / Town 23 Jacob St Melbourne Post Code SiteName State VIC 3000 A1 Mowing Ltd SimproClientID Customer Status Customer ABN 21912 39856322 Current Contact First Name Contact Last Name Contact Mobile Contact Email +6132658955 Jolly Roger heidit@celoces.com Client Site Archived Site Name Mobile. Sta... Subur... Post C... Contact : Email Street ... 048936522 23 Jacob St Melbourne Current 23 Jacob St Melbourne 30003025 Josh Broom heidit@celoces.. **Home / Create Job Docs** Edit Item When re-assigning job docs you can now search the staff list by typing in the Reassign to box. Assigned To Reassign To Craig Smith-Mobile Matt



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
- 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.

