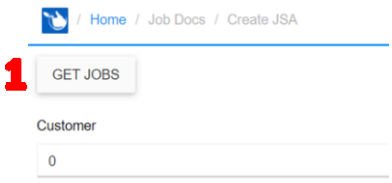
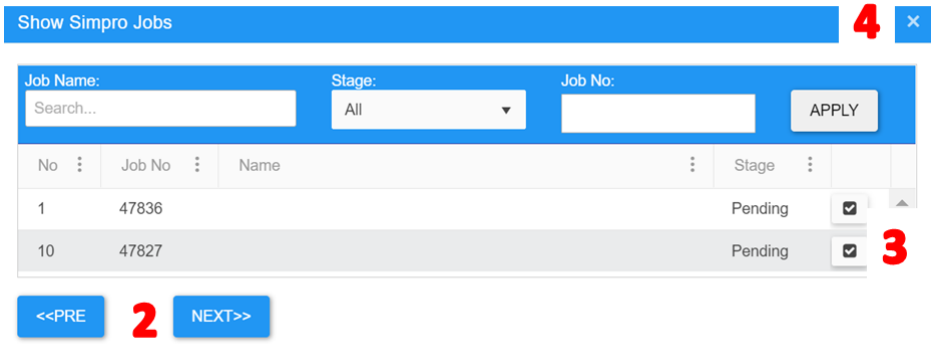
simPRO Integration

Once your database has been configured you will be able to pull job details from simPRO.

1. Click GET JOBS from any Create Job Docs screen (top left corner).

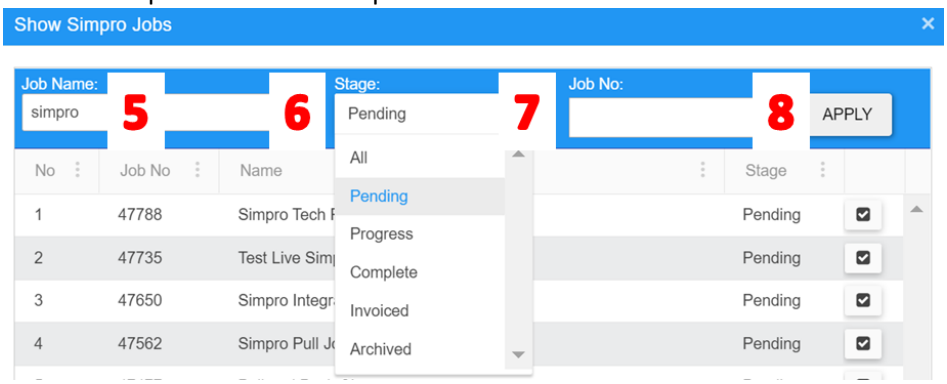


2. Use the <<PRE & NEXT>> to scroll thru the list
3. Click ✓ on the required Job you wish to create a job doc for.
4. Or click X to leave without selecting a job.

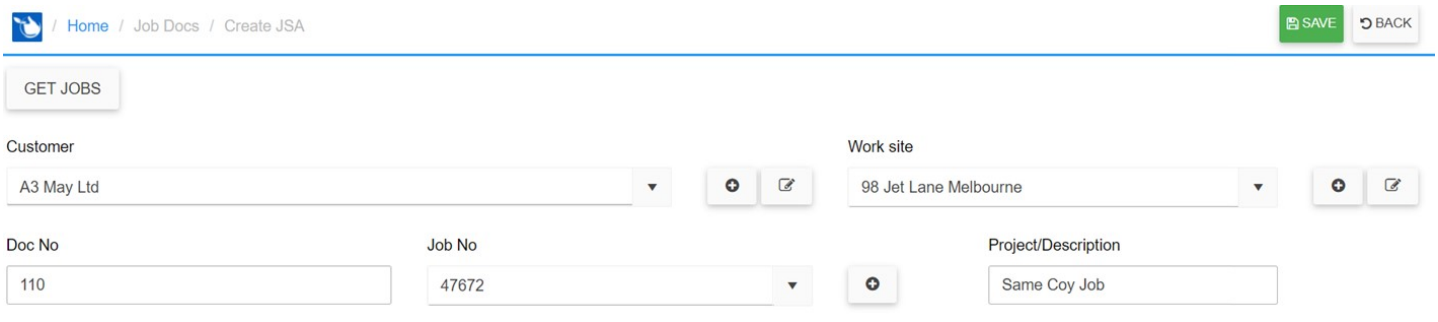


To narrow down the list you can use the search functions:

5. Type in part of the job name if know.
6. Select the simPRO stage e.g. Pending
7. Type in a Job No if it is known.
8. Click APPLY. Then follow steps 2-4 above as required.



Safetyminder will automatically create the customer, work site and contact along with the Job No & Description.
If the customer/worksite already exists in Safetyminder it will simply add the new job.



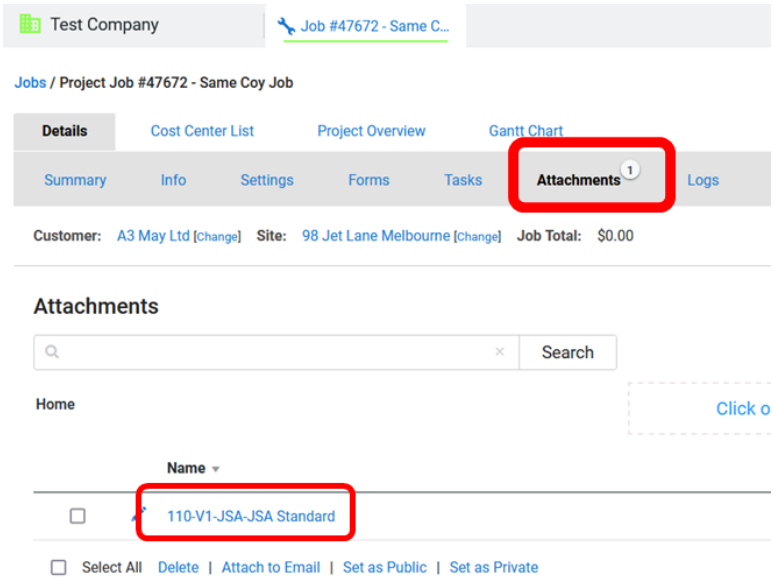
Contd/...

When the Job Doc is signed off in the Safetyminder mobile app it pushes the completed PDF form back into your simPRO database.

NOTE:

Due to constraints with the simPRO API:

- Only job number and name can be displayed in the list.
- Only Job Docs are pushed back into simPRO.



This can also be done from the Mobile App in any of the Create Jobs screens.

NOTES:

- There is a one off setup fee to configure SimPRO Integration for more details contact us at sales@safetyminder.co
- The logon details for simPRO are saved in encrypted format which can only be accessed by Safetyminder.
- To Get Jobs in the mobile app Staff will need to have their simPRO Employee loaded into their **Personal Details** in Safetyminder.

simPRO employee ID's can be found as per below: