simPRO SOFTWARE

Enterprise Implementation & Training Guide

Pre Implementation Course (offsite)

- Work flows and Change Management
- Cost Centres
- Labour Rates and Overheads
- Defaults and Security Groups
- Catalogue

Attendance
- Decision Makers
- simPRO Champion

The Pre Implementation course is offered in the following cities:

Brisbane
Sydney
Melbourne
Auckland
Christchurch

Day 1
Onsite - Implementation & Set-up

- Work flow Discussion
- System Set-up
- Accounting Integration
- Import Card Files
- Import Supplier Catalogues

Attendance
- Decision Makers
- IT Professional *if applicable*
- simPRO Champion
- Accountant/ Bookkeeper

Preparation
- Pre Implementation Course Booklet
- Company Logo in .jpg or letterhead in .pdf
- Chart of Accounts & Overhead Calculation
- As per Accounting and Supplier Documentation

Day 2
Onsite - Training

- Foundation
- Scheduling
- Full Service Work flow Process inc. Connect
- Navigation
- Card Files
- Materials *Catalogue, Pre-builds, Take-off*
- Basic Stock Management
- Form Set-up *Ongoing*

Attendance
- Manager
- All future users
- simPRO Champion

Preparation
- Examples of Quotes, Jobs and Invoices

Day 3
Onsite - Training

- Service Quotes to Invoice full Work flow
- Purchase Orders
- Contractor Management
- Invoices *Void invoices, Credit Notes and Payments*
- Accounting Link Training & Test

  If Applicable
- Connect

Attendance
- Manager
- All future users
- simPRO Champion
- Technicians

Preparation
- Examples of Quotes, Jobs, Invoices, SWIMS, JSA/s and any other specific forms you may use

Day 4
Onsite - Training

- Project Work flow from Quotes to Jobs and Project management
- Optional Quotes and Variations
- Materials Management *Purchase Orders, Stock, Stock Levels, Stock Take, Supplier Quotes*
- Basic Reports
- Follow up and cover any topics/questions that have not been covered or need to revisit

Attendance
- Manager
- All future users
- simPRO Champion

Preparation
- A list of challenges, questions and outstanding, topics to be covered

Additional Training Days

- More Complex Workflows - 1 Day *eg: multiple or large databases, many different workflows within the business*
- Maintenance Planner - 1 Day *Set-up and work flow*
- Asset heavy industry - 1 Day *Set-up and work flow*
- Multi Company - 1 Day *For each additional company set-up only*
- Advanced Estimating & Project Management - 1 Day
- Advanced Inventory Management - 1 Day

Other Variables

Multiple locations and multiple groups of employees may require additional days to be trained on the same topics

Disclaimer: This schedule is a guide only, the topics and length of time for a topic to be covered may change based on a business' circumstances, complexity and training needs.

Training Hours: We allocate 6 hours per day for training with the remainder used to change / modify any part of the setup information. We may come across areas or discussions that may exceed our training timeframes.