INTRO

This document provides a reference for reviewing and cleaning up your Simpro system. Each section includes detailed explanations and simplified checklist actions to help keep your data clean, up-to-date and duplicate free.

Using the recommendations in this cheat sheet should get your Simpro in tip top shape and operating at 100% efficiency with reliable reporting to manage your business.

We also offer a half day (4 hour) health check service where we can go through everything live on Zoom with you. During that session we will check, correct, update and recommend refinements in your Simpro system as an extended version of the below housekeeping recommendations.

PEOPLE

Customers, Contacts and Sites

Maintaining a clean and reliable contact database is essential for accurate communication, scheduling, and reporting. Duplicate customers, sites, and suppliers can cause confusion, incorrect allocations, and inflated record counts, while outdated contacts clutter your system and slow down operations. By ensuring your Contacts and Customers are accurate, you support efficient quoting, job management, and invoicing workflows.

☐ Use the Duplicate Contacts report to identify Contacts with matching details. Investigate and merge duplicates as needed.

☐ Ensure Sites have a clear name that is the residential address or commercial company / building name.

☐ Consolidate duplicate records directly in the Customer and Site list after confirming they are indeed the same entity. Use the merge option to merge one record into another.

☐ Run the Customer Archive report to identify customers or contacts with no recent activity and archive them accordingly.

☐ Check that all contact details are correctly linked to the right Customer or Supplier record to ensure accurate communication and reporting.

☐ Check that all suppliers and contractors are current and still useful in your database. Archive any records that are no longer required.

PROJECTS

Leads

The Leads section should only reflect active opportunities in your sales pipeline. Old or neglected leads create noise and prevent sales staff from focusing on viable opportunities. Properly archiving and categorising lost or abandoned leads gives you data to improve your lead conversion strategies over time.

☐ Archive leads that are no longer being followed up or are outdated to declutter the Open Leads tab.

☐ Ensure the Open Leads list reflects only those leads with active sales interest and upcoming follow-ups.

☐ Apply archive reasons when archiving leads to support future analysis of why opportunities are lost or abandoned (e.g., price, timing, competition).

Quotes

Quotes represent your potential income. Ensuring the quote list only shows active, relevant quotes helps sales and operations staff follow up in a timely manner. Archiving rejected, lost, or outdated quotes keeps your pipeline accurate, and improves reporting on conversion rates.

☐ Move quotes that are expired, rejected, or not progressing into the Closed/Archive tab to improve the visibility of active quoting efforts.

☐ Maintain a clean Open Quotes list showing only those with active follow-up plans or recent client engagement.

☐ Add notes and due dates to every active quote to define next steps and timelines for follow-up, helping prevent lost opportunities.

Jobs

Properly managing job statuses is critical for visibility across your operations. Knowing which jobs are pending, in progress, or completed—and ensuring each job includes notes and due dates—keeps your team aligned and focused. It also supports accurate scheduling, billing, and performance reporting.

☐ For jobs marked as Pending, include detailed notes on what is needed next (e.g., waiting on parts, awaiting customer confirmation), and set a due date for the follow-up action.

☐ Confirm that jobs in Progress are scheduled and that technicians have been assigned. These jobs should be ready to start or underway.

☐ Move jobs that are complete to the Completed tab and ensure invoicing is triggered immediately, or leave notes detailing why invoicing is delayed and who is responsible for resolving it.

Recurring Jobs and Recurring Invoices

Recurring Jobs and Invoices automate routine work but should be reviewed from time to time to ensure all jobs are still valid.

☐ Archive recurring jobs/invoices no longer in use.

☐ Ensure all recurring schedules are still applicable and being monitored.

☐ Update the description, pricing, contacts and other information of all recurring jobs and invoices

Invoices

Stale invoices hurt cash flow and clutter financial reports. Stay on top of what's collectible.

☐ Follow up on overdue invoices.

☐ Decide whether to chase, credit, or escalate unpaid invoices.

☐ Clean up the Invoice List by closing uncollectible balances.

☐ Consider using automated follow-ups (see Notifications below)

Purchase Orders & Supplier Invoices

Keeping purchase orders up to date improves communication with suppliers and ensures materials are accounted for.

☐ Go through the list of pending purchase orders and archive any that are no longer required.

☐ Follow up on outstanding deliveries or mismatches.

☐ Only keep POs in Pending that are actively awaited.

MATERIALS & BILLABLE ITEMS

Catalogue

The catalogue is the foundation of your material tracking, quoting, ordering, and stock management processes. A bloated or unorganised catalogue leads to inefficiencies, incorrect pricing, stock mismanagement, and confusion during job workflows. It is critical to keep the catalogue clean, well-organised, and limited only to items your business actively uses or expects to use in the near future.

An optimised catalogue improves stock management, quoting, and ordering. Unused and duplicate items cause inefficiency, incorrect pricing, incorrect stock and confusion. If your catalogue has over 4000 items you have too many. (Put a % sign in the catalogue search box to see how many you have)

☐ Identify and archive any catalogue items that have never been bought, sold, stocked, quoted, or used in a job or pre-build.

☐ Use the Duplicate Catalogue Items report to locate and merge duplicate entries. Confirm item identity before merging to prevent data loss.

☐ Consolidate catalogue items so each item exists once with multiple supplier part numbers and prices where applicable.

☐ Periodically review catalogue size. If there are more than 4,000 items, consider archiving older or unused items to keep the system manageable.

Stock

Proper stock control ensures you're not ordering unnecessarily and can accurately complete stocktakes. Removing unused storage devices and verifying counts increases visibility and reduces admin time.

☐ Review all storage devices and remove any that are no longer in use.

☐ Ensure all stock locations have accurate quantities entered.

☐ Conduct regular stocktakes to verify system stock aligns with physical inventory.

Prebuilds

When set up well, Prebuilds save time, reduce quoting errors, and streamline stock and purchasing. But only if they are kept up to date.

☐ Review usage: Identify Prebuilds not used in the last 2+ years and consider archiving them.

☐ Remove duplicates: Use naming conventions and part number fields to find similar or duplicate entries.

☐ Go through prebuilds and ensure the labour rates and included materials are all current and up to date.

☐ Delete/archive obsolete Prebuilds that reference discontinued materials or irrelevant services.

☐ Ensure you don't have too many groups and subgroups.

UTILITIES

Catalogue Auto Imports

Ensure your catalogue is regularly updated so quoting and invoicing are faster and more accurate.

☐ Consider turning on all catalogue imports available to you. Contact each supplier for your login details.

☐ Ensure all supplier catalogue auto-imports are set to 'Update Only' and not 'Create New Items' to avoid inflating the catalogue with unnecessary items.

☐ Check the auto import logs periodically to ensure the updates are active and working

Supplier Invoice Auto Imports

Get parts added to your purchase orders and supplier invoices automatically. Why waste time manually adding every item when Simpro can do it for you!

☐ Consider turning on all auto invoice imports available to you. Contact each supplier for your login details.

☐ Ensure all supplier invoice auto-imports are set to 'Create New Items' to ensure any newly purchased items are added to the catalogue and to the purchase order and invoice.

☐ Check the auto import logs periodically to ensure the updates are active and working

Plant & Equipment

A well-managed plant register helps track servicing, usage, and compliance for company-owned equipment.

☐ Review the plant and equipment list and remove any items no longer in service.

☐ Add missing equipment that should be tracked.

☐ Verify that service reminders are turned on where required.

Tasks

Tasks in Simpro are designed to help manage job and non-job-related actions such as purchasing, stock taking, progress claiming, quoting, repairs, follow-ups, reminders, and more. They compliment job workflows by giving visibility to the other pieces of work that keep the business running.

☐ Go through all current tasks and delete or complete any that are completed but not marked as such.

☐ Archive tasks that are no longer relevant (e.g., old reminders or already-resolved follow-ups).

☐ Ensure all tasks are assigned to someone and have a due date to be completed.

☐ Consider using task categories

Datafeed

This section helps ensure that you are getting the most out of automated datafeed imports and ensures that all current datafeeds are integrated properly. Don't forget that the first 3 datafeeds are free.

☐ Consider using Data Feed to auto-create jobs or leads from incoming emails such as website enquiries or real estate work orders.

☐ Consider using Data Feed to auto-enter any supplier invoices that are not included in the Supplier invoice auto import feature such as bunnings or other invoices received as PDF documents.

Alerts

Alerts act as your system to-do list. Keeping them current ensures the right things get done at the right time.

☐ Check the bell icon in Simpro to view alerts. Do you have 99+ showing? That's too many!

☐ Remove due dates or silence alerts that no longer apply.

☐ Keep the list tidy so important items are not overlooked.

SETUP & CONFIGURATION

Labour Rates

Accurate labour rates are essential for correct job costing, profit analysis, and invoicing. Outdated rates can cause financial misreporting and costing issues. This section ensures that labour rates reflect current wages, overheads, and markup strategies.

☐ Remove any legacy or unused labour rates that are no longer applicable to your business structure.

☐ Review all existing rates to ensure they reflect the current average labour cost and an appropriate markup or sell rate.

☐ Recalculate overhead costs regularly, especially after wage increases or changes to operating expenses.

☐ Under each employee profile, go to the Pay Rates tab and confirm the recorded cost and sell rates are accurate.

Cost Centres

Cost centres allow you to separate parts of your business for financial and departmental reporting, help with filtering and allow for more customisation of other configurations such as callout fees, scripts and security. Each service type or department should ideally have its own cost centre. Keeping these relevant and updated ensures clear job costing, margin analysis, and visibility into performance.

☐ Review your list of cost centres annually to ensure they reflect current services or departments.

☐ Remove any cost centres that are no longer active or relevant.

☐ Create new cost centres for emerging service types or internal divisions that need reporting separation.

Status Codes

Status codes reflect the stages of jobs and quotes in your workflow. When used properly, they clarify what action is next and trigger notifications or automation. An outdated or inconsistent list causes confusion and delays.

☐ Consult with your team to review all existing status codes and discuss how they are being used.

☐ Remove codes that are redundant, unclear, or never used.

☐ Assign unique colours to each status to support fast visual identification on schedules or dashboards.

☐ Align statuses with workflow milestones (e.g., Awaiting Customer, Materials Ordered, Ready to Invoice) and use them consistently.

☐ Ensure you align the Status Code Triggers to your requirements. Be careful of selecting too many auto triggers as these can make your job play status code ping pong.

Customer Tags, Customer Groups, and Customer Profiles

Tags, groups, and profiles allow you to classify and filter customers for marketing, reporting, automation, and permissions. Over time, these classifications can become inconsistent or outdated, leading to messy reporting or misdirected communications.

☐ Review the full list of tags, groups, and profiles currently in use and assess if they are still relevant.

☐ Standardise naming conventions to ensure consistency across records (e.g. capitalisation, abbreviations).

☐ Remove unused or overlapping tags/groups that cause confusion or clutter.

☐ Use these tools to target notifications, reports, or filtering for customer-specific workflows.

Notifications & Automation

Automating communications and workflows in Simpro reduces manual workload, improves consistency, and enhances customer satisfaction. This section helps ensure that relevant automated messages are active and appropriate.

☐ Enable key system notifications such as quote follow-ups, job reminders, overdue invoice alerts, and post-job feedback requests.

☐ Review all message templates for professionalism, accurate branding, and up-to-date content.

☐ Tailor automation logic to specific status changes, customer tags, or profiles where needed.

Activities

Activities are non-job schedule items such as meetings, training, or admin tasks. When used properly, they help reflect an employee's full schedule. However, too many or unclear activity types lead to inconsistent time tracking.

☐ Review all available activity types and evaluate which are actively used.

☐ Consolidate duplicate or redundant entries (e.g. 'Training Internal' vs 'Internal Training').

☐ Keep the list concise and relevant to reduce scheduling errors and simplify reporting.

☐ Ensure staff know when and how to use activities versus job schedules.

Teams

Teams are a useful way to group employees or contractors for scheduling and reporting. They also simplify scheduling by filtering large workforces into smaller teams on the schedule.

☐ Create relevant teams such as Field Staff, Electrical Division, Sydney Technicians, etc.

☐ Assign each staff member to a team that aligns with their work area.

☐ Use team filters in the schedule to show specific technicians and schedule more easily.

Zones

Zones are geographic labels applied to Sites, used to improve scheduling and location-based reporting. They help reduce travel time, optimise job allocation, and support territory management.

☐ Create zones based on delivery regions, suburbs, or postcode clusters.

☐ Assign a zone to every site to allow scheduling and reporting filters by geography.

☐ Use zone data to plan technician routing, minimise travel, or group jobs in the same area for efficiency.

Scripts

Scripts are text templates for common instructions, messages, or job notes. They save time and ensure consistency across communications, quotes, and invoices both in the office and onsite.

☐ Create scripts for recurring job descriptions, customer SMS messages, or follow-up emails.

☐ Use field tokens (like customer name or site address) to auto-fill details dynamically.

☐ Assign scripts to relevant cost centres to ensure only relevant scripts appear for specific job types.

☐ Regularly review and update scripts to align with your current tone, process, and brand.

Archive Reasons

Archive Reasons help you track why leads, quotes, or jobs didn't go ahead. This insight supports strategic improvements.

☐ Review current archive reasons for Leads, Quotes, and Jobs.

☐ Remove any that are irrelevant or unclear.

☐ Add new reasons that reflect real-world scenarios.

☐ Use archive reason filters in Reports to track trends.

Custom Fields

Custom Fields allow you to capture data where a field may not exist yet in Simpro. This improves reporting and internal processes. These can also be used in BI Reporting and on the lead, quote and job lists.

☐ Create custom fields for leads, quotes, jobs, employees, customers, etc.

☐ Use them to track important info like quote or job stages, deadlines, employee uniform sizes, or customer-specific data.

☐ Review regularly to keep fields relevant and in use.

☐ Consider using custom fields for your Custom Quote, Job and Invoice templates.

SIMPRO DEFAULTS

System Tab

System defaults control how your Simpro behaves by default. These settings should reflect current business practices.

☐ Set Lock Job to 'Lock items and price' (Not Estimates & Price).

☐ Set the 'Release license' setting to 120 minutes of inactivity or less.

☐ Review other defaults to ensure they are still appropriate.

Financial Tab

Financial defaults link Simpro to your accounting platform and control tax, surcharge, and rebate settings.

☐ Ensure account codes are correct and linked properly.

☐ Ensure 'Hold Retention Exclusive of GST' is set as the default

☐ If using Stripe, ensure correct expense and sales accounts are set for fees and surcharges.

☐ Update STC value if you do solar work.

Schedule Tab

Schedule defaults determine what appears when viewing or editing the Schedule tab.

☐ In the Day/Week View Fields, add job number, site name, cost centre, and customer name.

☐ Adjust Schedule Block Width and Height for better visibility of info and hours per day.

Customer Portal Tab

The Customer Portal gives selected clients real-time access to quotes and job statuses. This improves communication and reduces inbound enquiries.

☐ Enable for high-volume or frequent-service clients.

☐ Customise visible pages, colour schemes, and restrictions.

☐ Provide training or walkthroughs if needed.

Integrations Tab

Choose between Stripe and Square for payment integration. Stripe is typically preferred for its advanced features.

☐ Enable Stripe and set surcharge recovery to 2.2% if desired.

☐ Create a Payment Type for Stripe payments.

☐ Link correct sales and expense account codes in the Financial Defaults tab.

SECURITY

Simpro Premium Security Groups

Security groups in Simpro determine what each user role can access. Having the right access permissions protects sensitive information, prevents unauthorised changes, and streamlines user experiences. Overly permissive or outdated roles can result in confusion or data risk.

☐ Review all active security groups and ensure each is named clearly and used by the correct roles (e.g. Admin, Technician, Scheduler).

☐ Confirm permissions within each group match actual job responsibilities—some staff should not access financial data unless necessary.

☐ Update security groups to enable access to any new Simpro features introduced since the last review.

☐ Remove or consolidate groups that are no longer used or have unclear permissions.

Simpro Mobile Security Groups

☐ Review all active security groups and ensure each is named clearly and used by the correct roles (e.g. Apprentice, Technician, Supervisor, Etc.).

FORMS, TEMPLATES AND EMAILS

Your Simpro forms (quotes, invoices, service reports) are what customers see and should reflect your brand, professionalism, and accuracy. Email footers and templates also play a key role in how your business is perceived.

Default email settings

☐ Update your email footer to include current contact details, logo, social links, and legal disclaimers.

Quote, Job, Invoice and Purchase Order Forms

☐ Review and standardise your PDF form templates for letterhead branding, layout, and consistency across quote, invoice, and job forms.

☐ Consider involving a graphic designer to produce polished, modern custom templates that represent your business professionally.

REPORTING

Regular Reports

Consider using the following reports regularly to improve your business. Most of these reports can be scheduled so they end up in your inbox each day, week or month.

☐ Use the report scheduler to auto send your reports as PDF or excel files right to your inbox.

☐ Use the job activity report to see the cashflow of all current jobs.

☐ Use the WIP report to see the cumulative spend vs invoiced amounts.

☐ Use the Technician Profitability report to see which technicians are the most profitable

☐ Use the required materials report to see if there are any unassigned materials on completed jobs or to order in bulk across multiple jobs in one order.

☐ Explore the other reports that are useful to your business.

BI Reporting

BI reporting can get data out of Simpro and onto a dashboard where the standard reports can't. Even if the interface is giving you trouble to get your data out, you can use SQL code to get even more data into a colourful and useable format.

☐ Consider creating BI Dashboards for your Sales, Technicians or department KPI's.

☐ Enter your email to have dashboards emailed to you each day, week or month.

SIMPRO UPDATES

Simpro updates their software roughly every two weeks. Don't miss out on any useful features.

☐ Consider nominating someone to review all the updates that come out and do internal training when something useful to your team is released.

☐ Ensure you subscribe key people to our newsletters to ensure you stay on top of all the latest updates.

THIRD PARTY APPS

☐ Ensure you stay on top of all the useful third party apps that extend Simpro's capabilities.