



Connect BlueSafe to Simpro

A quick start for administrators who want to create job-ready safety documents from Simpro information and return completed PDFs to the right job.

Before you begin: have a BlueSafe organisation administrator, a Simpro administrator account, and your Simpro build URL ready. Supported build domains are simprosuite.com and simprocloud.com.

Connect once, then work from BlueSafe

- 1** Open the Simpro integration page in BlueSafe
Enter the customer's Simpro build URL and select Connect Simpro.
- 2** Authorise access in Simpro
Sign in to Simpro when prompted and approve BlueSafe. The Simpro user who authorises the connection must be a Simpro administrator.
- 3** Choose the Simpro company
For a multi-company build, select the company that belongs to the BlueSafe organisation. Single-company builds connect directly.
- 4** Import the job you need
From BlueSafe's Simpro Jobs page, select a job and import relevant job, customer and site information into a linked BlueSafe project.
- 5** Create, sign and return the document
Prepare prefilled SWMS, risk assessments, safety policies and other WHS documents. Collect worker signatures digitally, then explicitly select and upload the completed PDF to the corresponding Simpro job.

What moves between the systems

Simpro to BlueSafe

Selected job, customer and site information used to prefill a linked BlueSafe project.

then

BlueSafe to Simpro

A completed PDF only after an authorised BlueSafe user confirms the upload.

Connection behaviour: the connection is designed as a one-time administrator action. BlueSafe uses the ongoing authorised connection until it is disconnected or access is revoked.