

IMPLEMENTATION MILESTONES



WELCOME

Welcome Call
Welcome Email
Register for Simpro Learning Toolbox

PROJECT KICK-OFF

Business Discovery
Workflows
Getting Started
Training Plan

CONFIGURATION

System Setup
Data Population and Import
Accounting Integration
'Go Live' Checklist

USER TRAINING

Workflow Training
Inventory
Go Live Checklist
Toolbox Learning

GO-LIVE

Finalise Workflows and Processes
Q&A

EXPAND

Additional Implementation & Training Available:

Maintenance Planner
-
High Volume Assets
-
Multi Company
-
Advanced Estimating and Project Management
-
Advanced Inventory Management
-
Form Builder
-
BI Reports

PREPARE

Attendees
Decision makers & Simpro Champion

Preparation
Your thoughts on when you would like to get started

PLAN & DESIGN

Attendees
Decision makers & Simpro Champion

Preparation
Your current workflows and relevant business information

CONFIGURE

Attendees
Decision makers, Simpro Champion, Accountant & Bookkeeper

Preparation
Company logo in .jpg or letterhead in .pdf, chart of counts and overhead calculator

USER TESTING

Attendees
Decision makers, simPRO Champion & Users (office & field)

Preparation
Examples of quotes, job cards, invoices, estimation sheets, OHS and other forms

DEPLOY

Attendees
Decision makers, simPRO Champion & Users (office)

Preparation
Questions your team raised during your user testing and transacting