

simpliCitysm Pro Software

Quick Reference Guide - Page 1

This guide will show you how to access the basic features of simpliCity Pro.
Questions? Contact Pro Support @ 888.852.4485, option 1
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Logging into simpliCity Pro

1. Open your Internet Browser (IE7+, Firefox, etc...).
2. Go to <http://www.simpliCityfl.com>.
3. Click on the **simpliCity Login** button.
4. Enter your Username & Password.
5. Click the **Login** button to login.

simpliCity Login

Login

simpliCity Navigation Basics - How to Get Around in simpliCity

The screenshot shows the simpliCity navigation menu with several annotations:

- Menu Bar - Use to Search Tables, Create & Access Reports**: Points to the top navigation bar containing 'Find', 'Help', 'CLAIMS', 'SOLICITATIONS', 'PROJECTS', 'QUESTIONS', 'SOV-LOCATIONS', and 'SOV-ASSETS'.
- Access Find & Help Features**: Points to the 'Find' and 'Help' buttons.
- simpliCity button - Use to go back to Dashboard page**: Points to the 'simpliCity' logo button.
- Quick Action buttons - View Account, Start Projects/RFPs, etc.**: Points to the bottom navigation bar with buttons like 'View Account', 'Submit Claim', 'Start a Project', 'Start a RFP', 'Add SOV Location', and 'Q&A Forum'.

Account Page - Viewing Your Account Page in simpliCity Pro

1. Click on the **simpliCity** button to go to your Dashboard.
2. At the top of the page, click on the **View Account** button.
3. Scroll up and down the page to view your information.
4. Under the **Form Customization** Area, select one checkbox at a time to view the information you desire.

simpliCity
View Account

Form Customization: Select the checkboxes below to show/hide information.

Show Account & Main Contact Show Insurance Info. Show Emergency Contact Show FMIT & Support Information

Account Page - Accessing Claims, Projects, SOV-Location Data

1. From the Account Page, scroll down to the correct Section. (SOV-Locations, Claim Submittals, etc...)
2. Click column headings to re-sort, re-group, etc.. the data.
3. To view a specific record, click on the **Edit** or **View** button on the same row as the record you wish to view.

The screenshot shows a table with a dropdown menu for sorting. The dropdown menu is open, showing options: 'Sort A to Z' (selected), 'Sort Z to A', and 'Sort by Date Modified'. Below the table, there are 'EDIT' and 'VIEW' buttons for a record.

SOV Location
Public Services Admin Bldg/Fire Station

Account Page - Opening Account Page Sections in Full Report View

To get a better look at information in a Section View:

1. From the Account Page, scroll down to the correct Section.
2. Click on the **Full Report** link in the header of the View.
3. This will open up a full report of the data from that view.
4. **Click & hold down** your left mouse button on column headers to drag to another spot. Release the button to place the column.

The screenshot shows a report titled 'Schedule of Value Locations'. The report has columns for 'Total # of Assets', 'Total # of Assets', and '# of Uninsured Assets'. A mouse cursor is shown dragging the 'Total # of Assets' column header to the right.

Menu Bar - Accessing the "Find" Function to Search simpliCity

Use the Menu Bar to access **Find** (Search) features.

1. Left-click on the Menu Bar Item (Table) you want to Search.
2. From the Drop-Down, Select the **"Find"** option.
3. To search all fields in the table, leave "<Some field>" as it is, leave **"contains"** as it is, & enter your search term in the blank.

The screenshot shows the search interface. It includes a search bar with 'Find Locations', a dropdown menu for search criteria (currently set to '<Some field>'), and a 'DISPLAY' button. A dropdown menu is open, showing options: 'contains', 'does not contain', 'is', 'is not', 'starts with', and 'does not start with'.

Show locations for which all of the following are true:

<Some field> contains Enter Search Term Here

4. To search a specific field, click the "<Some field>" drop-down & select the field you would like to search.
5. To make your search more specific, click the **"contains"** drop-down and select a different option.
6. To add additional search criteria, roll your mouse over the search field. Click on the "+" sign that appears.
7. To run your search, click the **"Display"** button.

Menu Bar - Accessing & Creating simpliCity Reports - Basic Overview

1. From the **Menu Bar**, select the appropriate button.
2. Under the **Shared Reports** section, select a report.
3. Your report will display on the screen.

To create a report, do the following:

1. From the Menu Bar, select the appropriate button.
2. Select, **"Create a New Report"** from the drop-down.
3. From the Report Builder page, select your report type.
4. To filter the report & exclude data, select, "Show only...." and then select the field and search criteria you want.
5. To sort or group your results, select, "Custom sorting..."
6. Click **Display** to preview the file; **Save & Display** to save.

The screenshot shows the report builder interface. It includes a search bar with 'Find Locations', a 'Create a New Report' button, and a 'Shared Reports' section. Below, there are radio buttons for 'Show all locations' and 'Show only locations', and a dropdown menu for sorting options: 'Default sorting (by Date Modified)' and 'Custom sorting/grouping'. There are 'DISPLAY' and 'SAVE & DISPLAY' buttons.

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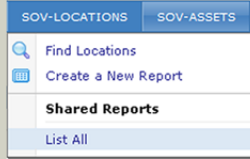
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Menu Bar - Accessing Schedule of Value Locations & Assets

An additional way to take a closer look at Locations & Assets:

1. From the Menu Bar, select the SOV-Locations button.
2. Select "List All" from the drop-down.
3. This shows all of your SOV-Locations in one table view.



	Location Name	Location Number	Total Assets	Building Limit	Property Limit	Location Map
EDIT VIEW	Controls/Administration	001	39	\$70,815,000.00	\$24,165,000.00	Google Map View
EDIT VIEW	Influent Lift Station	002	19	\$9,385,000.00	\$5,280,000.00	Google Map View
EDIT VIEW	Influent Structure	003	21	\$6,800,000.00	\$3,765,000.00	Google Map View

4. Each record (row across) is a single Location. Each Location can have multiple assets.
5. Each column shows different details about the Location, such as Number, Assets, etc.
6. If details are colored in blue, you can click to drill-down into the information.
7. If Edit or View Buttons are present, you can click them to view Location details.
8. Clicking on the Google Map View button opens up a Map with the Location on it.
9. Location Number is the 3-Digit Prefix that begins each 6-Digit Asset Number.
10. Building & Personal Property Limits in this view are totaled for each Location.

SOV-Asset - Adding an Uninsured Asset

In order to add an Uninsured Asset you will:

1. Identify the Location in which your Uninsured Asset is located.
2. From the Menu Bar, select the List All report from the SOV-Locations button.
3. This shows all of your SOV-Locations in one table view.

EDIT VIEW	Main Office	015	\$619,447.00	\$121,541.00	Add Asset
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4. Click the Add Asset button for the Location at which the Asset is located.
5. Enter the Asset information on the page & click the Save button to save.

Asset Information Form

Member Name City of Delray Beach	Related Location City Hall	Location Address 100 NW 1st Avenue, Delray Beach, FL	Asset ID * 0140-NI-001-
Asset Name <input type="text"/>	Asset Status Uninsured	Critical Asset <input type="checkbox"/> ?	
Asset Address <input type="text"/>	Zip <input type="text"/>	Google Map Yahoo Map	* Uninsured Asset Reason <input type="text"/>
Show Asset Details <input type="checkbox"/> ?	Show Asset Photos <input type="checkbox"/> ?	Show Appraisal & Gap Info <input type="checkbox"/> ?	Show Contents Info <input type="checkbox"/> ?

SOV-Assets - How to Navigate the SOV-Asset Page

Each Asset is listed independently in the SOV-Assets table.

1. To find an asset, select the List All report for SOV-Assets
2. Results are sorted by Location Number & Asset Number.
3. Scroll to find the Asset you want, then click the Edit button.



EDIT VIEW	City Hall	001	City Hall	001001
EDIT VIEW	City Hall	001	City Hall Generator Building	001002

The Asset Information Form below appears.

Asset Information Form

Member Name City of Delray Beach	Related Location City Hall	Location Address 100 NW 1st Avenue, Delray Beach, FL	Asset ID * 0140-001001
Asset Name City Hall	Asset Status Insured	Critical Asset <input type="checkbox"/> ?	
Asset Address 100 NW 1st Avenue, Delray Beach, FL	Zip 33444	Google Map Yahoo Map	
Form Customization: Use the checkboxes below to Show/Hide asset information. (Note: Checking multiple boxes at once will require you to scroll down the page.)			
Show FMIT Policy Info. <input type="checkbox"/> ?	Show Asset Details <input type="checkbox"/> ?	Show Asset Photos <input type="checkbox"/> ?	Show Appraisal & Gap Info <input type="checkbox"/> ?
Show Contents Info <input type="checkbox"/> ?			

1. This page has checkboxes similar to the Accounts page to show information efficiently.
2. For best results, check only one of the box at a time to display the desired information.
3. Scroll down to view the information that appears below the checkboxes.
4. For Show Asset Details, additional checkboxes will appear to allow further viewing.

Adding Asset Photos in simpliCity

To Add a Photo for an Asset in simpliCity, do the following:

1. In the Table Menu, click on the SOV-Assets button.
2. Click on Asset Report - Assets w/out Photos from drop-down.
3. This will open the report of all assets w/out Photos.
4. Click on the Edit button for the Asset which needs a photo.
5. This will open the Asset Photo Upload Page
6. Review the Location Number and Asset Name to confirm.
7. In the Image 1 section, click the Browse button to find photo.
- Note: To ensure good performance, ensure photos are <200 kb*
8. Enter a Description in the Description field (Optional)
9. Add up to 4 photos by repeating for Image 2-4 sections.
10. Select the Save button to upload the photos.
11. Repeat steps 4-10 for adding photos for other Assets.

