Last Updated: December 09 2024

MANAGE TASKS IN MOBILE

Overview

Technicians can access, update and complete tasks that they have been assigned to, associated with quotes and jobs in the Task module. Tasks in Simpro Mobile make it easier for project managers to break down quotes and jobs into smaller tasks and for the field technicians to complete the assigned tasks and record their progress when working on site.

To use tasks in Simpro Mobile, an employee with a Simpro Premium user licence can create and assign tasks to technicians in Simpro Premium. Learn more in How to Use Tasks.

Required setup

Before performing the steps detailed below, ensure that this part of your build is set up correctly. The relevant steps to set up the features and workflows detailed in this article can be found here:

How to Use Licences

In order to view content or perform actions referred to in this article you need to have the appropriate permissions enabled in your security group. Go to **System** > **Setup > Security Groups** and access your security group to update your permissions. The relevant security group tab and specific permissions for this article can be found here:

Mobile Security Groups: Tasks

Create tasks

You can create tasks in Simpro Mobile from the **Task** module.

To start creating a task in the **Task** module:

1. Tap **+ CREATE NEW TASK**.
2. Enter the details, such as **Task Title**, **Customer**, **Site**, **Estimated Start** and **Due date**, **Task Description**, and **Status**.
3. Assign a technician to the task.
4. Select a **Category**.
5. Enter **Task notes**.
6. Tap **Save**.

Manage tasks

Access the **Task** module to view the list of tasks and completed tasks.

To view and manage tasks:

1. Tap to open the required task. The task name, due date and status bar and addi details are displayed. You can either mark the task as completed, use the **Progress %**

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slider or manually select a Status to update the task status.
   - Select **Mark as complete** or select the **Closed** status to update the task to complete.
   - This also updates the **Completed date** on the task in Simpro Premium to the current date.
2. Tap to view, add and manage **ATTACHMENTS**, if required.
3. Update the task **Status** using the options in the drop-down.
   - Select **Closed** to mark the task as completed.
4. Enter task **Description** and **Notes** manually or tap **Insert Script** to add the relevant content.
5. View and adjust who is assigned to the task and the corresponding **Start date** and **Due date**.
   - Tasks created in Simpro Mobile and assigned to you cannot have the Task title or Start and Due date changed from the Task module.
6. Tap **Save** to close the task and update changes.

Note that technicians must complete / close a dependent task before they can close Prerequisite tasks.

Learn more in the Learning Toolbox

For additional training, complete an interactive material in the Simpro's Learning Toolbox. Learn more in About Simpro's Learning Toolbox.