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HOW TO SET UP STATUSES

Overview

You can manage most of your Simpro Mobile settings within Simpro Premium. These settings apply to all Simpro Mobile users.

To access your Simpro Mobile settings in Simpro Premium, go to **System** ⚙ **> Setup > Mobile > Simpro Mobile**, then adjust settings through the **General**, **Service**, **Statuses**, and **Audits** sub-tabs, as required.

Set up mobile statuses

Enable job and quote statuses for field technicians to update in Simpro Mobile. You can use mobile status colours to make it easier for field technicians to view the status of all the jobs on their **Run Sheets**.

The mobile job statuses can also update the job status in Simpro Premium to reflect the progress of the job according to the automatic triggers set up for **Mobile Jobs**.

simPRO Mobile Settings

| General | **Statuses** | Audits | Invoicing |

✎ Edit Mobile Status and Event Trigger

* Status Name

| Weather |

A job has been updated as '**Weather**' on the mobile app.

Mobile Status Type

○ Start/Continue   ● Stop   ○ Pause

Mobile Status Colour

[red box]

simPRO Event

Change to the following status and Job stage in simPRO if Status Priority allows.

simPRO Status

| ★ Job: Reschedule Requ... ▾ | and

Job Stage

| Not Set ▾ |

SAVE   CANCEL

To create a new job status:

1. Go to **System** ⚙ **> Setup > Mobile > Simpro Mobile**.
2. Go to the **Statuses** tab.
3. Click **Create Job Status**.
4. Enter a **Name** for the status.
5. Under **Mobile status type**:
   - Select **Start/Continue** to end time recording and create a timestamp on the job card indicating the technician is still on site, when this status is selected. When the technician selects a status that continues the work, this does not trigger an alert in Simpro Premium for job card approval.
   - Select **Stop** to end the time recording. If Automatic Job Card Approval is toggled off, when the technician selects this status, an alert is triggered in Simpro Premium that the job card requires approval.
   - Select **Pause** to temporarily pause the time recording. When the technician selects a status that pauses time, this does not trigger an alert in Simpro Premium for job card approval. In Simpro Mobile > **Service** module, you can use **PAUSE WORK** if there is at least one **Mobile Status** set up in Simpro Premium for paused work.
6. Select the **Status Colour**.
7. Under **Simpro Premium Event**:
   - Select the **Simpro Premium Status** that the job updates to when this mobile job status is selected. Statuses indicated with the star icon are selected to **Ignore Status Priority**. Learn more in [Status Codes and Automatic Triggers](#).
   - Select the **Job Stage** that the job updates to when this mobile job status is selected.
8. Select the **Status Colour**.
9. Click **Save**.

To create a new quote status, go to the **Quote** sub-tab and follow the same steps.

To change the order of a **Mobile Status** in Simpro Mobile click and move the status using the drag handles.

To edit mobile statuses, click the required status and update status details. Remove individual mobile statuses from appearing in Simpro Mobile by clicking the **delete** icon.

Note that you cannot change the **Name** or **Time Tracking** option of the **Completed** and **Rejected** statuses. The **Completed** status cannot be deleted.

Mobile triggers

Mobile triggers are used to assign a Job Stage and Simpro Premium Status Codes to a job when a Simpro Mobile action is completed. Such as the pre and post audit being completed, or the technician selecting travelling or onsite in Simpro Mobile.

To edit mobile triggers:

1. Click the required trigger in the **Mobile Triggers** table.
2. Select the **Job / Quote Stage**.
3. Select the **Simpro Premium Status**.
    - Statuses indicated with the star icon are selected to **Ignore Status Priority**. Learn more in [Status Codes and Automatic Triggers](#).
    - A Simpro Premium Status must be selected in order for the **Job/Quote Stage** to be updated.
4. Select the **Status Colour**.
5. Click **Save**.

SUPPORT

System Status

SERVICES

Feature Benefits

Helpdesk

Walk Me Through

Product Portal

Industries

Pricing

Refer a Friend

Partners

DEVELOPER CENTER | LEGAL