Enterprise - Default Order Statuses

Last Modified on 01/29/2021 8:09 am CST

Order Statuses

On the order record several statuses indicate how the order is viewed in the system. While users may not use every default status to track their order, it is useful to understand what role each order status is intended to fill. Below is a comprehensive guide to each order status and how it may be utilized in the system.

Note These statuses may be changed via your company preferences, please work with support.

Status	Description
Active	This status indicates the record is considered active. It is a status that may be used on current orders that are being serviced with assignments on them. It is typically used for ongoing assignments and long term placements - after all assignments have ended this status should be changed to closed.
Cancelled	This status indicates the record is considered inactive. This is a status that may be used to track orders that have been prematurely cancelled by the client and should be used on orders that **have not received** assignments.
Cancelled After Filled	This status indicates the record is considered inactive. This is a status that may be used to track orders that have been prematurely cancelled by the client and should be used on orders that **have received** assignments. Changing the status of an order to 'CancelledAfterFilled' will prompt the service rep if they would like to close associated assignments on the record. Assignments closed this way will automatically receive the 'Complete' status and will be given an actual end date of the current date. This status is considered an implied closed status and will cause an assignment restriction for future assignments for this record.
	This status indicates the record is considered inactive. This is a status that may be used to track orders that have been closed. This could be used on orders that have been filled and currently have employee's

Status	Description
Closed	on assignment or on orders whose assignments have ended. Changing the status of an order to 'Closed' will prompt the service rep if they would like to close associated assignments on the record. Assignments closed this way will automatically receive the 'Complete' status and will be given an actual end date of the current date. This status is considered an implied closed status and will cause an assignment restriction for future assignments for this record.
Converted	This status indicates the record is considered inactive. This is a status that may be used to track orders where the employee has been hired permanently by the customer and thus has ended his/her assignments. Changing the status of an order to 'Converted' will prompt the service rep if they would like to close associated assignments on the record. Assignments closed this way will automatically receive the 'Complete' status and will be given an actual end date of the current date. This status is considered an implied closed status and will cause an assignment restriction for future assignments for this record.
Deleted	This status indicates the record is considered inactive. This is a status that may be used to track orders where the service rep accidentally created the order. Changing the status of an order to 'Deleted' will prompt the service rep if they would like to close associated assignments on the record. Assignments closed this way will automatically receive the 'deleted/mistakenly' entered status and will be given an actual end date of the current date. This status is considered an implied closed status and will cause an assignment restriction for future assignments for this record.
	This status indicates the record is considered inactive. This is a status that may be used to track orders where

Status	Description
Expired	the orders end date has succeeded without the placement of an employee and a creation of an assignment Changing the status of an order to 'Expired' will prompt the service rep if they would like to close associated assignments on the record. Assignments closed this way will automatically receive the 'Complete' status and will be given an actual end date of the current date. This status is considered an implied closed status and will cause an assignment restriction for future assignments for this record.
Filled	This status indicates the record is considered active. This status will automatically populate on the record when the number of assignment equals or exceeds the number required. After all assignments have ended on this order this status should be changed to closed.
Inactive	This status indicates the record is considered inactive. This is a status that may be used to track orders that are generically considered inactive, or should not be used. This could be used on orders that have been filled and currently have employee's on assignment or on those orders whose assignments have ended. Changing the status of an order to 'Inactive' will prompt the service rep if they would like to close associated assignments on the record. Assignments closed this way will automatically receive the complete status and will be given an actual end date of the current date. This status is considered an implied closed status and will cause an assignment restriction for future assignments for this record.
Inquiry	This status indicates the record is considered active. This status may be used for orders that are in development or where a quote is being established. This will generally become an unfilled order once the quote has been accepted by the client, or to a relevant

Status	Description
"Lost status". Orders with this status should not have assignments assigned to them however assignments can be created with no restriction.	
Lost - Competitor	This status indicates the record is considered inactive. This is a status that may be used to track orders that have been lost because a bid for an order has been lost to a competitor. Changing the status of an order to 'Closed' will prompt the service rep if they would like to close associated assignments on the record. Assignments closed this way will automatically receive the 'Complete' status and will be given an actual end date of the current date. This status is considered an implied closed status and will cause an assignment restriction for future assignments for this record.
Lost - Customer Filled	This status indicates the record is considered inactive. This is a status that may be used to track orders that have been lost because the customer was able to fill the order themselves. Changing the status of an order to 'Lost-CustomerFilled' will prompt the service rep if they would like to close associated assignments on the record. Assignments closed this way will automatically receive the 'Complete' status and will be given an actual end date of the current date. This status is considered an implied closed status and will cause an assignment restriction for future assignments for this record.
Lost - No One Accepted	This status indicates the record is considered inactive. This is a status that may be used to track orders that have been lost because no candidates/employees were willing to accept the order within the time allotted for the order. Changing the status of an order to 'Lost-NoOneAccepted' will prompt the service rep if they would like to close associated assignments on the record. Assignments closed this way will automatically receive the 'Complete' status and will

Status	Description
	be given an actual end date of the current date. This status is considered an implied closed status and will cause an assignment restriction for future assignments for this record.
Lost - No One Qualified	This status indicates the record is considered inactive. This is a status that may be used to track orders that have been Lost because service reps were unable to find a candidate/employee qualified to staff this position within the time allotted for the order. Changing the status of an order to 'Lost-NoOneQualified' will prompt the service rep if they would like to close associated assignments on the record. Assignments closed this way will automatically receive the 'Complete' status and will be given an actual end date of the current date. This status is considered an implied closed status and will cause an assignment restriction for future assignments for this record.
Master	This status indicates the record is considered active. This status may be used for orders that are considered "master orders" which should never be closed and which should be used as templates for future orders. Using the 'Copy Order' action in the 'actions' menu can work well when tracking and utilizing master orders. Orders with this status should not have assignments assigned to them however assignments can be created with no restriction.
On-hold	This status indicates the record is considered inactive. This is a status that may be used to track orders that have been been postponed or put off at the request of either the customer for internal reasons. This status is considered an implied closed status and will cause an assignment restriction for future assignments for this record.
	This status indicates the record is considered active.

Status	Description
Open	This status may be used for orders that are "standing orders" which should never be closed and have no predetermined required amount established. This will generally never become an unfilled order, and will become closed or filled as by the request of the client.
Partially Filled	This status indicates the record is considered active. This status may be used to track orders that have not been completely filled yet still have one or more assignments assigned to them. After all assignments have been made this will automatically change to filled. After all assignments have ended on this order this status should be changed to closed.
Payroll	This status indicates the record is considered active. This status may be used to track orders for employees that maintain a regular payroll. A good example is internal employees where the order is the means to creating the assignments so that those employees can be paid. After all assignments have ended on this order this status should be changed to closed.
Pending Approval	This status indicates the record is considered active. This status is automatically assigned for orders created via WebCenter that have an order creation workflow set to where orders must be approved by another contact on the customer record. Once the order is approved by the contact on WebCenter the Order will flip to unfilled. Orders should not be filled prior to being approved by the appropriate contact.
Pending Web Order	This status indicates the record is considered active. This status is automatically assigned for orders created via WebCenter that have the instant order approval workflow set. Here the orders must be approved by a service rep. Once the order is approved by the service rep, they should switch the status manually to unfilled to denote this approval on the order record. Orders should not be filled prior to being approved by the appropriate service rep. For more information, Check out, Customer: How to Create and Submit Orders

Status	Description
Requisition	This status indicates th...onsidered active. This status may be used to track orders that fall into generic requisition category This may be a holding status for customers who don't use WebCenter that means it is pending approval from another contact. This will generally never become an unfilled order, and will become closed or filled as by the request of the client.
Stolen	This status indicates the record is considered inactive. This is a status that may be used to track orders that have been Lost because the client decided to hire the employee on full time after utilizing your sourcing and without compensation. Changing the status of an order to 'Stolen' will prompt the service rep if they would like to close associated assignments on the record. Assignments closed this way will automatically receive the 'Complete' status and will be given an actual end date of the current date. This status is considered an implied closed status and will cause an assignment restriction for future assignments for this record.
Under Construction	This status indicates the record is considered active. This status may be used to track orders that are incomplete and as such should not be sourced at this given time. Information may be pending from the client and should be completed prior to becoming an unfilled order.
Unfilled	This status indicates the record is considered active. This is the default status that an order assumes when the order is created. This status may be used to track orders that have not been completely filled yet, and still have less assignments than the number required for them. After all assignments have been made this will automatically change to filled. After all assignments have ended on this order this status should be changed to closed. *Note* Some assignment statuses may cause the number of employees assigned to an order to "roll-back". Should this arise, the status will, by default, reset itself to 'unfilled'. For a better understanding of

Status	Description
	assignment statuses related to the order follow The Assignment Status link.
Unfilled - Replace	This status indicates the record is considered active. This status may be used to track orders that were filled, however due to certain circumstances need restaffing. After all assignments have been made this will automatically change to filled. After all assignments have ended on this order this status should be changed to closed.

Related Articles