Task Status Guide

Get to know the Workforce task statuses and best-practice use cases for each.

The most commonly used statuses are:

■ Ready   ■ Scheduled   ■ In Progress   ■ Performed   ■ Completed

Status Definitions:

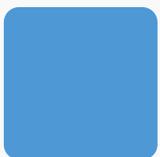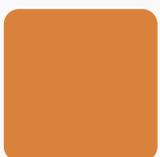|	Not Ready	Tasks that are on hold or not yet allocated to a technician/run.
	Ready	Tasks that are ready to be scheduled but have not yet got an appointment or are simply just ready for your technicians to head to if you aren't into scheduling appointments.
	Scheduled	Task has an appointment and has been scheduled. It can be beneficial to write the time and day of the appointment if it hasn't been made in Uptick and just via the phone instead.
	In Progress	Technician is on site or is completing the report. Note: This will start automatically when starting a session.
	Field Review	This status is for putting a task back to the technician for them to review. They might need to clarify something or upload a photo that was missed etc. Whatever is needed to be done can be communicated to them via the timeline notes.
	Access Review	Tenancy has access issues - this is the technician escalating the task to the office as the property has either rejected access or there is an issue with access. Technician to write on the timeline a note as to what has happened so the office can follow up correctly.

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Pending External —

When you are waiting to hear back from someone external to the company. Technicians - this could be when a logbook is not on-site and you are awaiting the building manager to return it next week so you can review. For office, this could be when you are awaiting a subcontractor to get back to you. Both these cases should be communicated and regularly updated on the timeline.

Vacant —

Tenancy is vacant - this is the technician escalating the task to the office as the tenancy is not occupied. It is helpful to upload a photo to the documents tab for office assistance to attach when sending to the client.
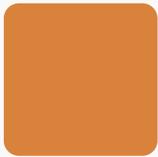
Revisit —

Need to head back to site? Change the status to revisit so you know to head back later, or schedule in another time at another date.

Performed —

Task information has been entered and the report is ready to be created, processed (maybe quoted) and invoiced. Task would then automatically go to completed and be archived when it is dispatched.

Office Review —

Used by Technicians when office assistance is required. The tenancy may have changed names, client information that has changed or items that need updating such as duplicate tasks or routines. Technicians to write on the timeline a note as to why the task is in office review. Can be used in the office too, when escalating a task to a manager - try using "assigned office" for the user required to review if this is the case.

Completed —

Completed tasks should be archived immediately once reported (and invoiced if they require an invoice.)

Cancelled —

For jobs that have been cancelled.

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