

Customer Contract 10R2

Each new customer added to Tempworks has a "Basic" contract attached by default. To create a new contract, go to the contract section from the **Visifile** by clicking on the *Contract* button (as circled below).

The screenshot shows the main interface of the Tempworks software. At the top, there are navigation tabs: Visifile, Address, Invoicing, Message, Misc, Search, and Switch. Below these are various functional buttons: Refresh, PlaceOrder, Invoices, Payments, ParentAcct, Worksites, DNA, Docs, and Contract (circled in red). A table below shows customer statistics such as RBal (13,999), CredLim (25,000), and AR Bal (1,804). A 'Customer Contacts' table lists employees like Alice Combs, Brenda Fisher, and Jim Holcomb. At the bottom, there are two smaller tables: 'Department List' and 'Customer Contracts'.

Or by navigating to the **Invoicing** tab/**Invoicing** sub tab and clicking on the *See* button (as circled).

This screenshot shows the 'Invoicing' sub-tab within the software. It contains several configuration sections: 'Invoicing' (Style, Invoice Count, Column Type, Invoice Method, Inv Email Address, Currency, Inv Handling, Max Inv Amount, Global Unique ID), 'Separate invoices by' (checkboxes for Dept, Supervisor, Aldent, SubEntity, Week-End, Branch, Cost Center, Worksite, PO, Skill Code, Division, Dept Addr), 'Invoicing schedule' (Bill customer daily, Bill customer non-weekly?, Bill Cycle), and 'Contract' (LkpContract dropdown with 'See' button circled in red, and Contract text field). At the bottom, there is a table for 'Select fields to add to the invoice line item detail' with columns for 'Invoice Line Item Field' and 'Input Mask'.

*Note - The Basic contract will not allow any changes, and will give the user an error if this is attempted.

ContractID Lkp: View all

Contract # Lkp:

11 basic

11 basic

Visifile Defaults JobSetup RequireDocs Other Directory Switchboard

ContractID: 11

ContractID: basic

ContractStatus: A

Start Date: EndDate:

Contract Effective Date:

Contract Type: customer

Government Contract: Prevailing Wage: Order Flag:

LiveDate:

Time Card To Use:

Rate Review Date:

Contract Version: 1.0

Special Benefits:

Insurance Requirements:

Indemnification:

Contract Description: Default Contract

Reporting Requirements:

Conversion Agreement Details:

General Note:

IsPeo:

To create a new customer contract, click on the *NSR* button in the upper left corner of the contract screen. The following window will appear.

Contract New

Contract Add Quick

ContractID:

ContractID Lkp: American Banks

ContractStatus: A

Start Date: 12/12/2005 EndDate: 12/18/2006

Contract Effective Date: 12/12/2005

Contract Type: standard

Ok Cancel

In this screen input the *Contract ID* (Name) and the *ContractStatus* (Active or Inactive). The user can choose a *Start* and *End Date* for the Contract as well as a *Contract Effective Date*. Finally choose from the *Contract Type* drop down menu. Then click on the *OK* button to create the new contract.

ContractID Lkp: View all

Contract # Lkp:

169 American Banks

169 American E

Visifile Defaults JobSetup RequireDocs Other Directory Switchboard

ContractID: 169
 ContractID: American Banks
 ContractStatus: A
 Start Date: 12/12/2005 EndDate: 12/18/2006
 Contract Effective Date: 12/12/2005
 Contract Type: standard
 Government Contract: Prevailing Wage: Order Flag:
 LiveDate:
 Time Card To Use: standard
 Rate Review Date: 12/01/2006
 Contract Version: 1.0
 Special Benefits: customer offers full benefit package upon hire
 Insurance Requirements: all associates handling cash must be bondable
 Indemnification:

Contract Description: general contract - negotiated rates
 Reporting Requirements: customer needs breakdown of money spent in all departments on a monthly basis
 Conversion Agreement Details: no fee after 120 days. Fees pro-rated prior to 120 days based on current direct hire fees
 General Note:
 IsPeo:

Once the new contract is created the user can fill in the appropriate information. Most of the remaining fields on the contract **Visifile** tab are free form. The *IsPeo* check box indicates that this contract is for a Professional Employee Organization client and that fees will be charged against paychecks issued for employee's assigned to this customer.

The customer contract **Defaults** tab allows the user to attach multipliers (mark up) and shifts as well as any accruals that may be applicable to the customer.

ContractID Lkp: View all

Contract # Lkp:

169 American Banks

169 American E

Visifile Defaults JobSetup RequireDocs Other Directory Switchboard

Default Multiplier Codes See Multiplier Code 169

Multiplier code	Default code
1.4	<input type="checkbox"/>
1.45	<input type="checkbox"/>
1.5	<input type="checkbox"/>
American Bank	<input type="checkbox"/>
Happy	<input checked="" type="checkbox"/>
*	<input type="checkbox"/>

Record: 5 of 5

Default Shifts

ShiftName	StartTime	EndTime	# Hours	Refresh
Day	9:00	17:00	8	
Flower	7:00	15:00	8	
Evening	15:00	22:00	7	
Swing	16:00	4:00	12	
GraveYard	22:00	6:00	8	

Record: 5 of 5

Contract Accruals

AccrualID
VacAsg
VacPTD
VacPTOSick
*

Record: 3 of 3

The user can attach multipliers from the *Multiplier code* drop down menu. If the multiplier does not currently exist click on the *See Multiplier Code* button to create a new multiplier or edit a current code.

To attach shifts to a contract select the shift from the *ShiftName* drop down menu or type in the *ShiftName*, *StartTime*, and *EndTime* for the new shift.

***Note – All shift times need to be entered in military time (ie. 4 pm = 16:00).**

To track accruals for the contract select the accrual type from the *AccrualID* drop down menu.

***Note – Only users with administrator access are able to create new accrual types.**

The **Job Setup** tab in the customer contract allows the user to specify job titles and the corresponding shifts, as well as pay and bill rates associated with them. When an order is created with the job title and shift listed the other information will automatically default into the order.

***Note – Only shifts and multipliers that have been set up in the *Defaults* tab will be visible in the *Job Setup* tab.**

Title Code	Description	Shift	DefaultMultiplier	TitleCode	Payrate	Billrate	OBillrate	DBillrate	Job Description
A500	Data Entry	B Shift	1.45		\$45.00	\$65.25	\$97.88	\$130.50	Enters Data

***Note – pay rates and bill rates established in the **Job Setup** tab on the customer contract cannot be changed on the order. This information can only be changed at the assignment level when this feature is used.**

The **RequireDocs** tab allows the user to set up documents that the employee will need before being placed on an assignment. This information will default automatically to any orders created for this customer. If there is a list of documents that correspond to a job title the *Category lkup* look up field can be used. To add all documents attached to the job title, click *Add All Req Documents*. If the customer requires documents that are not related to a specific job title they can be selected individually by choosing the *Scope* and *Document Name*.

Act	Scope	Document Name	Authority	Required	StateDep	DateDep	Job Title	Notes
<input checked="" type="checkbox"/>	FEDERAL	Certificate	ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Health Information Man	
<input checked="" type="checkbox"/>	FEDERAL	Drug Test	ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Health Information Man	
<input checked="" type="checkbox"/>	FEDERAL	PPD	ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Health Information Man	

***Note – In this section the information can be sorted in ascending or descending order by clicking on the column headers.**

The **Other** Tab contains various forms that relate to the Customer Contract.

Contract Miscellaneous Button - allows the user to enter information that relates to the Contract that may not be covered by another area in contract record. This area is free form so that all miscellaneous information can be entered as needed.

See Multiplier Codes – allows the user to look at the details associated with specific Multiplier Codes or create a new multiplier code to add to the contract. This area was mentioned in the **Defaults** tab area and can be navigated to from the button in that area as well. When the user clicks on the button a window is displayed with the multiplier code information.

Multiplier Look-up:

Multiplier Code: 1.45 Swing Diff Pay: \$0.00

RT Markup: 1.45 Swing Diff Bill: \$0.00

OT Markup*: 1.45 x 1.5 Grave Diff Pay: \$0.00

DT Markup*: 1.45 x 2 Grave Diff Bill: \$0.00

Apply Bill: (Calculate the overtime bill rates based on the regular bill rates)

Apply Pay: (Calculate the bill rates based on the pay rates)

Note:

* OTRate and DTRate Markup Calculations:
 BillRate = [PayRate] x [RT Markup]
 OTBillRate = ([PayRate] or [BillRate]) x [OTMultiplier] x [OTMarkup]
 DTBillRate = ([PayRate] or [BillRate]) x [DTMultiplier] x [DTMarkup]

Ex.
 PayRate = \$10.00 Calculated Values:
 RTMarkup = 1.4 BillRate = \$10.00 x 1.4 = \$14.00
 OTMarkup = 1.3 OTBillRate = (\$10.00 x 1.5) x 1.3 = \$19.50
 OTMultiplier = 1.5 DTBillRate = (\$10.00 x 2.0) x 1.2 = \$24.00
 DTMarkup = 1.2
 DTMultiplier = 2.0

Sample Calculations:
 PayRate: \$10.00
 BillRate: \$14.50
 OBillRate: \$21.75
 DBillRate: \$29.00

Calculate

To create a new multiplier code the user clicks on the *NSR* button as circled. The name of the code should be entered in the *Multiplier Code* field. Now enter the *RT Markup* (regular time), *OT Markup* (overtime) and *DT Markup* (double time) in the corresponding fields.

Next select how the mark up should be calculated by clicking in either the *Apply Bill* or *Apply Pay* check box.

***Note – 98% of the time bill rates are marked up off the pay rate so the *Apply Pay* check box will usually be checked.**

PEO Billing and Employee – This section is for PEO (Professional Employment Organization) customers. This section allows for billing information to be input for the different types of administration fees.

Visifile	Defaults	JobSetup	RequireDocs	Other	Directory	Switchboard					
<table border="1"> <tr> <td>Contract Miscellaneous</td> <td>See Multiplier Codes</td> <td>PEO Billing and Employee</td> <td>Holiday</td> <td>Contract Text</td> </tr> </table>							Contract Miscellaneous	See Multiplier Codes	PEO Billing and Employee	Holiday	Contract Text
Contract Miscellaneous	See Multiplier Codes	PEO Billing and Employee	Holiday	Contract Text							
Add all fee types											
PeoFee TypeId	InvoiceText	Active	FeeRate	IsAmount	IsRatio	MaxPer Employee					
Benefit expense	Benefit expense	<input checked="" type="checkbox"/>	50	<input checked="" type="checkbox"/>		\$250.00					
Per check fee	Per check fee	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>		\$1.00					
		<input type="checkbox"/>		<input type="checkbox"/>							

Select the fee from the *PeoFee TypeID* drop down menu, enter the *FeeRate* and select how the fee will be calculated by clicking in the *IsAmount* (flat rate fee) or *IsRatio* (percentage fee) check box. Finally enter the maximum fee to be charged in the *MaxPer Employee* field.

***Note – Once information has been entered into this form it cannot be deleted. To stop the fee from being billed click in the *Active* check box by the appropriate fee and it will remove the check mark and deactivate that fee. Also, in order for Tempworks to look for this information the *IsPeo* check box on the contract **Visifile** must be checked (as mentioned earlier in this document).**

Holiday Button – This section is for reference purposes only and will not affect transaction processing or pay and bill rates. Choose the *Holiday/Code* from the drop down menu, select the *Calc Method* as listed in white text at the top of the form and then enter the *Bill* and *Pay* rates, the *paycode* and the *Priority* for the code.

Visifile	Defaults	JobSetup	RequireDocs	Other	Directory	Switchboard					
<table border="1"> <tr> <td>Contract Miscellaneous</td> <td>See Multiplier Codes</td> <td>PEO Billing and Employee</td> <td>Holiday</td> <td>Contract Text</td> </tr> </table>							Contract Miscellaneous	See Multiplier Codes	PEO Billing and Employee	Holiday	Contract Text
Contract Miscellaneous	See Multiplier Codes	PEO Billing and Employee	Holiday	Contract Text							
<p>This screen is for reference purposes only. It does not impact transaction processing or pay or bill</p> <p>In Calc Method use P for Premiums (fixed dollar)</p> <p>M for Multipliers (percentage increase - 1.5 is time and half)</p>											
Holiday/Code	Calc Method	Bill	Pay	paycode:	Priority						
Christmas	P	20	11	Hol	1						
Labor Day	M	28	15	Fringe Ben	3						
*											

Contract Text – This form allows the user to create a contract document.

The user can create a new contract document by clicking on the *NSR* button in the upper left corner of this form. Enter the Title for the document and use the *Category*, *SubCategory*, and *Section* drop down menus to outline the areas of the document.

Once the contract has been completed the user can click on the *Preview* icon as circled above to see a print preview of the document and then print it to the user’s default printer.

The **Directory** tab in the customer contract allows the user to see all of the contracts that are currently in the system. This is also where the *View all* button will navigate to from any area of the contract.

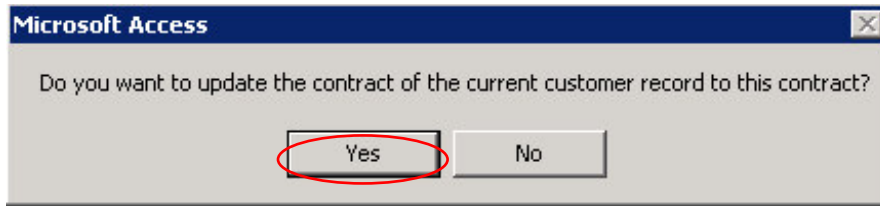
ContractID	Contract Desc	Version	Status	StartDate	EndDate	Created	RepName
1234		1.0	A			12/01/04	Inicholls
American		1.0	A			01/21/05	priiti
American Bank		1.0	A			06/13/05	mkramer
American Banks	general contract - ne	1.0	A	12/12/05	12/18/06	12/20/05	alisha
American Choppers	general contract - ne	1.0	A	08/30/04	08/30/05	08/30/04	mthomson
American Contract		1.0	A	12/12/04	12/12/05	12/23/04	peter
basic	Default Contract	1.0	A			04/07/04	ntran
Builders Supply		1.0	A	10/01/04	09/30/05	10/11/04	dwood
Carol's Boutique		1.0	A	08/16/04	08/24/06	08/26/04	mthomson
Company D		1.0	A	12/31/04	01/01/10	04/29/05	dwood
contract 1		1.0	A			11/19/04	Inicholls
Crane		1.0	A			09/09/04	mthomson
Crom EQ		1.0	A			09/07/04	dwood
David's Contract		1.0	A			11/24/04	davidd
forklift	forklifters	1.0	A	02/28/05	02/01/06	02/28/05	sunny

The buttons listed under the **Filter** heading allow the user to narrow down the list to find specific contracts.

To select a contract, double click on the *ContractID* (contract name) and Tempworks will open the contract selected.

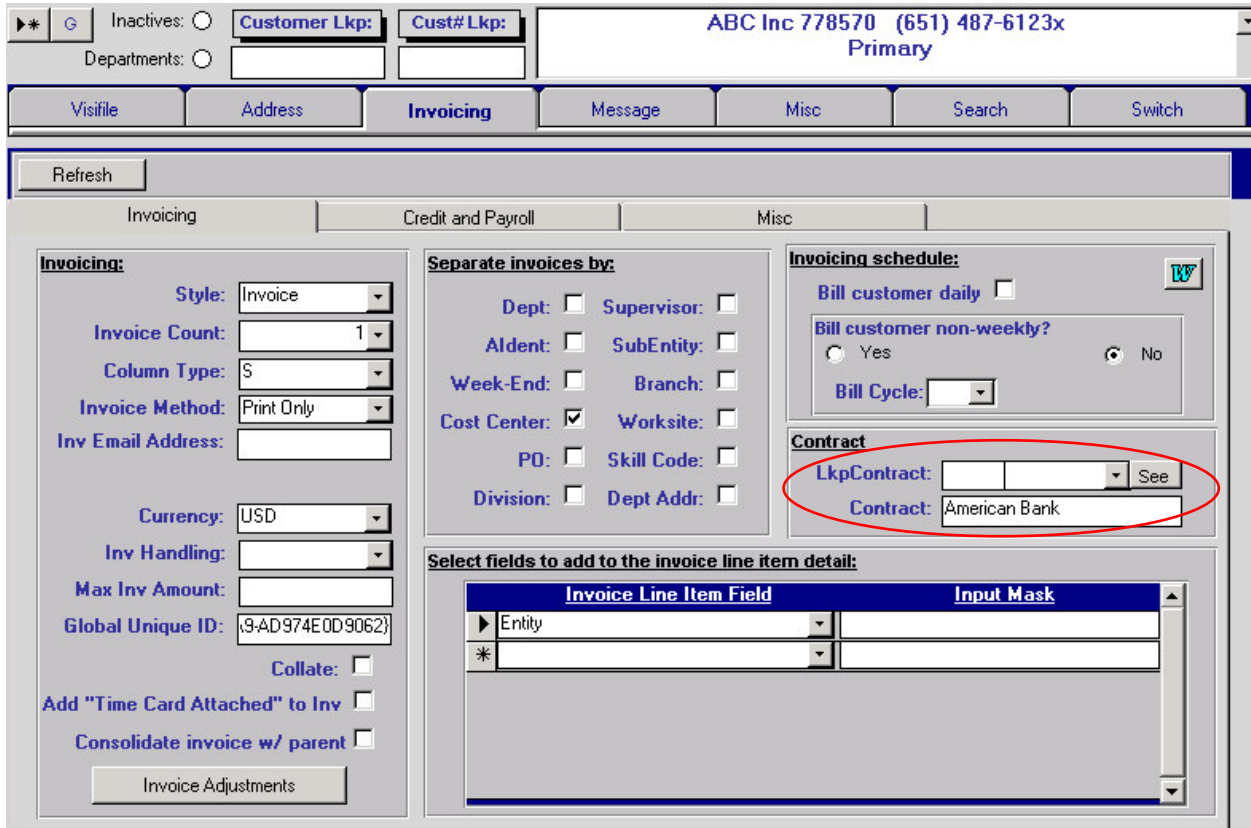
*Note - In this section the information can be sorted in ascending or descending order by clicking on the column headers.

Once the user is done entering the contract information, click on the *Close door* button in the upper left corner of the screen. When this button is clicked Tempworks will give the following prompt:



If the contract should be added to the open customer record click on the *Yes* button and the contract will be attached to the customer record.

Once the contract has been attached the *Contract* field in the **Invoicing** tab/**Invoicing** sub tab will list the *ContractID* (contract name) of the attached contract.



If a different contract should be attached to the customer record the user will use the *LkpContract* look up field in the Contract area by entering the first few letters of the *ContractID* and selecting the contract to be attached from the drop down list.