
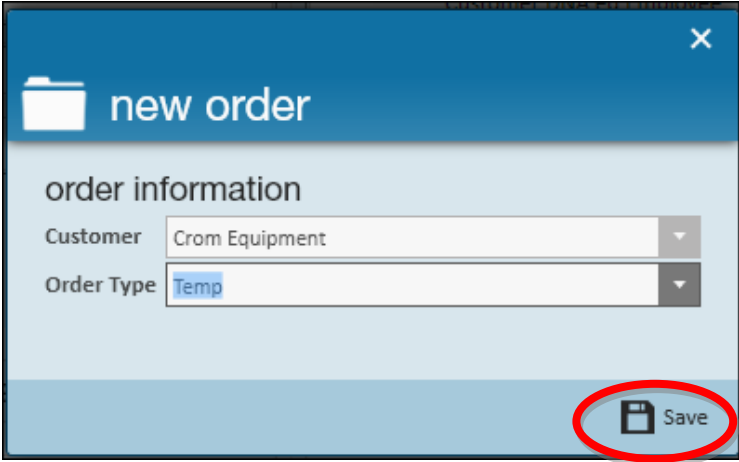



15R1 Enterprise Utilizing Master Orders

Enterprise “Master” **Order** functionality allows users to save time creating **Orders** for common job requests for their **Customers**. “Master” **Orders** are unique to each **Customer** and *Department*, so they can be highly customized with as much information as possible.

Creating a Master Order

To open the window to add a new **Order** record to Enterprise you can go to the *E* button in the upper left and click the *New* button and then select the *Order* option from the drop down menu or select the  button from the **Order** record *Actions Bar*. You can also use the **Hot Key** combination of *Alt + 3*. The window below will be displayed:



If you are in the **Customer** record when you select *New Order*, from the  menu the *Customer* name and *Department* will automatically be selected. If creating a new **Order** from the **Order** area or any other record in Enterprise make sure to select the correct **Customer** and *Department* from the *Customer* drop down menu.

The *Order Type* will default to “Temp” (for Temporary), but you can select other types from the drop down menu (ie. “DH”, “TF”, etc.) When you have selected the *Order Type*, click on the *Save* button to create and open the new **Order**. The new **Order** will open to the **Details** form.

Order Details Web Options

Customer: Creative Intentions Inc. Work Site: Site A
 Department: Shipping 435 Main Street
 Customer ID: 779140 Worker Comp: 8810 Beechwood, OH 43214
 Directions: East on Hwy 10 North on East side st.

financial details

Pay Rate: \$10.00 Multiplier: None
 Bill Rate: \$10.50 Pay Periods: 52
 Overtime Bill: \$0.00 GP Percent:
 Doubletime Bill: \$0.00 GP Estimate: \$0.00
 Overtime Plan: PlanSTD Desired GM %:

job information

Required: 10 Assigned: 0
 Order Type: TE Temp
 Job Title: Shipping And Receiving Clerk
 Description: Loads and unloads pallets into trucks. Scans in product shipping and deliveries.
 Dress Code: Denim jeans, t-shirts w/ no printing, steel-toed shoes
 Safety Notes:
 Start Date: 3/1/2008
 Duration: 4 months
 Est. End Date: 6/30/2008
 Shift:
 Start Time: End Time:
 Shift Notes:
 Sun Mon Tues Wed Thu Fri Sat

contacts

Name	Description	Office Phone
Sanders, John	Supervisor	(651) 334-2334x123
Stewart, Kevin	Timecard Alt 1	(651) 332-2332x123

other information

Status: **Master**
 Taken By: aisha
 Sales Team: dwood
 Branch: Memphis SE
 Do Not Auto-Close:
 Notes:

Fill out the **Order Details** making sure that the *Work Site*, *Worker Comp* and *Job Title* are correct. Then add any additional information that is usually the same for this type of **Order**. This can include number of people *Required*, *Description*, *Dress Code*, *Duration*, *Shift* and/or *Start Time* and *End Time*. Select the normal *Pay Rate* and *Bill Rate*, add a **Contact** to a *Role*, etc. The **Order** will default to a *Status* of “Unfilled” so you will have to change the **Order Status** to “Master”.

*Note – Information added in the *PO Setup* and *Interest Codes* forms can also be added to the “Master” **Order**. This information will then pull into **Orders** copied from the “Master”.

visifile
 details
candidates
 search
 log
 job posting
 messages
 documents
 custom data
 search

Show only active candidates

Drag a column header here to group by that column.

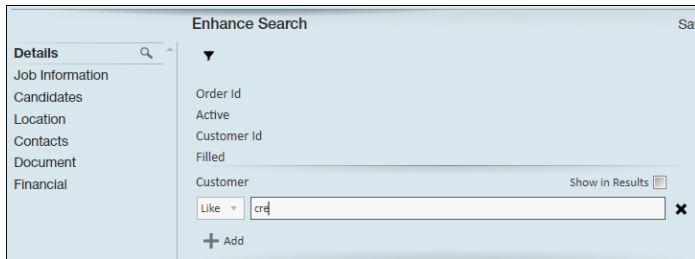
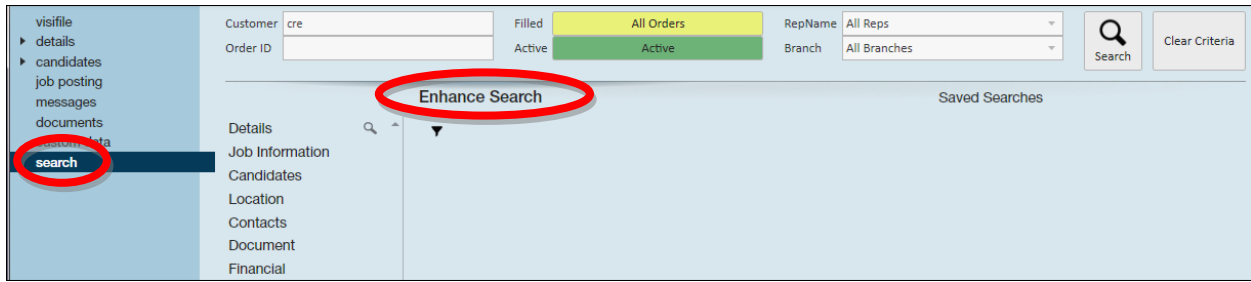
First Name	Last Name	Phone Number	Status	Active	Branch Name	Status Date	Comments	Call-Em-All
John	Anderson	(651) 452-0467	Candidate	<input checked="" type="checkbox"/>	Memphis NE	10/25/2010		
Frank	Arkansas	(651) 241-8241...	Candidate	<input checked="" type="checkbox"/>	Memphis NE	10/25/2010		
Shannon	Barker	(651) 247-8247...	Candidate	<input checked="" type="checkbox"/>	Memphis SE	10/25/2010		
Stephen	Barnes	(651) 310-9310...	Candidate	<input checked="" type="checkbox"/>	Memphis NE	10/25/2010		
Sam	Becket	(651) 248-8248...	Candidate	<input checked="" type="checkbox"/>	Memphis NE	10/25/2010		
Susie	Davis	(651) 322-9322...	Candidate	<input checked="" type="checkbox"/>	Memphis NE	10/25/2010		

Employees that are commonly assigned to this **Order** can be added to the **Candidates** form. The **Candidates** form on the “Master” **Order** becomes your “hot list” of proven **Employees** that can be sent back to this **Customer** time and again.

*Note – The **Candidates** form does not transfer when a copy of the “Master” **Order** is made.

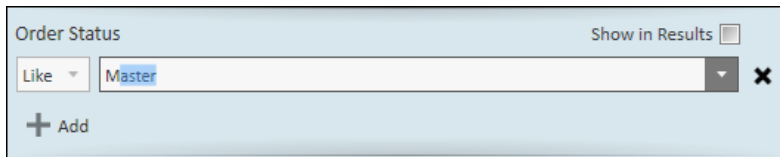
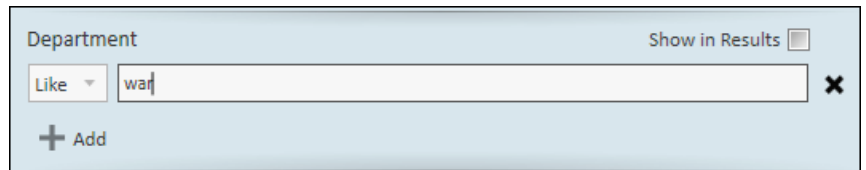
Searching for Master Orders

To locate "Master" **Orders** open the **Order** record area and select the **Search** option from the menu on the left. Then select *Enhance Search*. The screen below will be displayed:



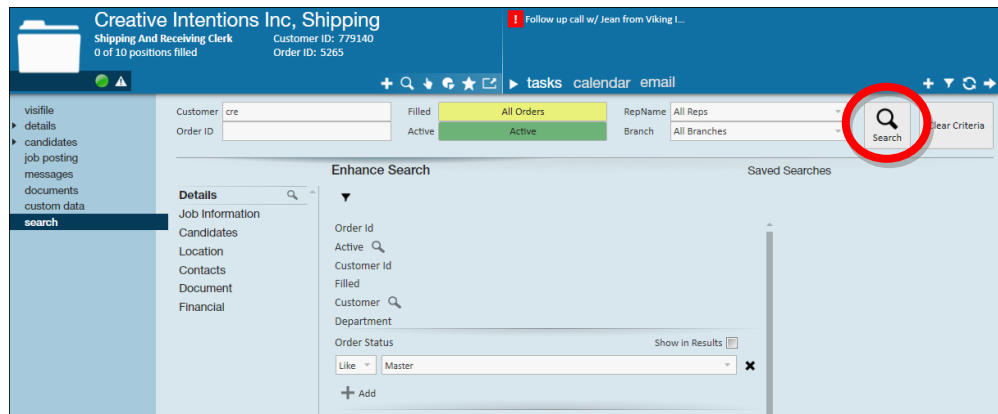
In the *Details* form enter the *Customer* name...

The *Department* (if any)...



and choose "Master" from the *Order Status* drop down menu.

Then click on *Search* in the upper right.



***Note – To add these criteria to your *Saved Searches*, click on the  button at the top of the screen.**


The screenshot shows the TempWorks Enterprise interface for 'Creative Intentions Inc, Shipping'. The top navigation bar includes 'tasks', 'calendar', and 'email'. A search bar is visible with filters for 'Filled' (All Orders) and 'Active' (All Statuses). Below the search bar, a table displays search results. The first result is highlighted:

Order...	Customer	Department	Job Title	Order...	Pay R...	Bill Ra...	Start Date	Order Status	Nu...	Number Assigned
5265	Creative Intentions Inc	Shipping	Shipping And Rec...	TE	\$10.00	\$10.50	3/1/2008	Master	10	0

From the **Search** results list double-click on the line for the **Order** record that you need to copy. The **Order** will open to the **Visifile**. To verify that you have selected the correct **Order**, open the **Order Details** screen.

Copying a Master Order

The screenshot shows the 'Order Details' screen for 'Creative Intentions Inc, Shipping'. The left sidebar contains a list of actions, with 'Copy Order' circled in red. The main area displays 'financial details' and 'contacts'.

Once you've verified that the correct **Order** has been selected, open the  drop down menu and select the option for *Copy Order* (as circled above).

The dialog box is titled 'TempWorks Enterprise' and contains a warning icon and the following text: 'This will create a new copy of this order and navigate to it. Would you like to continue?'. There are two buttons: 'Yes' and 'No'.

The prompt to the left will appear, indicating that you are creating a copy of the currently open **Order** and once created, it will automatically open to the new **Order**. To proceed, click *Yes*. To cancel the copy, click *No*.

*Note – You should not use the *Copy Order* function if the currently open **Order** is for a different **Customer** and/or **Department** than the one you need to create. Neither the **Customer** nor the **Department** can be changed at the **Order** level. If either of these is wrong when the new **Order** is created, change the *Status* to "Deleted" and *Save*. Then start over with creating the **Order** for the correct **Customer** and **Department**.

Creative Intentions Inc, Shipping
Shipping And Receiving Clerk
0 of 1 positions filled
Customer ID: 779140
Order ID: 6161

Follow up call w/ Jean from Viking L...

tasks calendar email

details

interest codes
required documents
vendors
invoice recipients
candidates
job posting
messages
documents
custom data
search

employee
customer
order
assignment
contact
pay / bill
calendar
reports
all options

Order Details Web Options

customer information

Customer: Creative Intentions Inc Work Site: Site A
435 Main Street
Beechwood, OH 43214
Department: Shipping
Customer ID: 779140 Worker Comp: 8810
Directions: East on Hwy 10 North on East side st.

financial details

Pay Rate: \$10.00 Multiplier: None
Bill Rate: \$10.50 Pay Periods: 52
Overtime Bill: \$0.00 GP Percent:
Doubletime Bill: \$0.00 GP Estimate:
Overtime Plan: PlanSTD Desired GM %:

job information

Required: 1 Assigned: 0
Order Type: TE Temp
Job Title: Shipping And Receiving Clerk
Description: Loads and unloads pallets into trucks. Scans in product shipping and deliveries.
Dress Code: Denim jeans, t-shirts w/ no printing, steel-toed shoes
Safety Notes:
Start Date: 3/1/2008
Duration: 4 months
Est. End Date: 6/30/2008
Shift:
Start Time: End Time:
Shift Notes:
Sun Mon Tues Wed Thu Fri Sat

contacts

Name	Description	Office Phone
Sanders, John	Supervisor	(651) 334-2334x123
Stewart, Kevin	Timecard Alt 1	(651) 332-2332x123

other information

Status: Unfilled
Taken By: alisha
Sales Team: dwood
Branch: Memphis SE
Do Not Auto-Close:
Notes:

Once the copied **Order** is created it will open to the **Visifile** form. Click on **Details** from the menu on the left and add the *Start Date*. Update any other information on the new **Order** that is different from what was entered on the "Master". An **Order** that is copied from a "Master" **Order** will automatically have a *Status* of "Unfilled". The **Order Status** is not copied over from the "Master" **Order**. Once all of the information in the new **Order** has been updated *Save* the record. You can now run a **Search** for **Employees** or go to the **Candidates** form on the "Master" to go through the "hot list" for this **Order**.

*Note – If users are copying previous **Orders**, creating "Master" **Orders** can avoid some costly errors. For example, let's say that a **Customer** has a negotiated mark up and that specific *Multiplier* codes have been linked to their record, but then there is a rate increase and the *Multiplier* code default changes. The new *Multiplier* rates will only be added to new **Orders** created after the changes are made. However if a user copies an **Order** that has the old rates, it copies the old mark up and does not pull in the new *Multiplier* codes. If "Master" **Orders** are being utilized, only these **Orders** need to be updated with the new rates because all copies will be from these **Orders**.

Still Have Questions?

For more information about master order functionality contact our customer support group at 651-452-0366 or by sending an email to support@tempworks.com.

To schedule training on master orders, submit suggestions on how to improve this document, or to request documentation on other Enterprise functionality please contact the TempWorks Training Department at Trainers@TempWorks.com.