

TempWorks Sales Basic Training

There are many features and functions of TempWorks that can be useful tools in the sales process. These tools include (but are not limited to) managing sales documents, logging sales calls, sharing your sales information with others, managing opportunities, tracking your schedule, etc. The following is meant to be a supplement to the Basic Training Manual.

Some fields and forms may look different in your version of TempWorks since TempWorks is customizable to your company's needs.

Contents of individual drop down fields are customized for each company.

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Customer Tab

Customer Hierarchy

Customer Lkp: **Crom Equipment 10623 (666) 466-7788x Primary**

Departments:

Refresh PlaceOrder Invoices Payments ParentAcct Worksites DNA Docs Contract

TWTrack SeeOrders SeeAsgs SalesHist MasterView Opportunity Support

Status: RBal: 3,042,816 CredLim: 25,000 RSales12M: 3,142,256

AR Bal: 16,697 RDue: 3,022,019 Sales12M: 2,941 RSalesYTD: 3,142,256

Past Due: 2,360 LPay: 10/5/2007 Sales YTD: 2,941 RLifeSales: 3,142,256

Branch: Memphis SE

Date	Action	Contact	Message	Rep	Date Due	Completed?
10/16/2007	CustomerDN		CustomerDNAEmployee	tw1		<input type="checkbox"/>
5/16/2007	message	Fisher, Brenda		tw4	5/16/2007	<input type="checkbox"/>
5/16/2007	10-Day Call			tw6		<input type="checkbox"/>
5/10/2007	AR - 1st Call		Late payment - promise to pay by 6/01/07	alisha	6/1/2007	<input type="checkbox"/>
5/10/2007	Cold Call-1st	Walter, William	New client - setting up meeting	alisha	5/10/2007	<input type="checkbox"/>
5/10/2007	Absent (Sick)	Wilson, Henry	Has the flu - won't be in to work today.	alisha		<input type="checkbox"/>

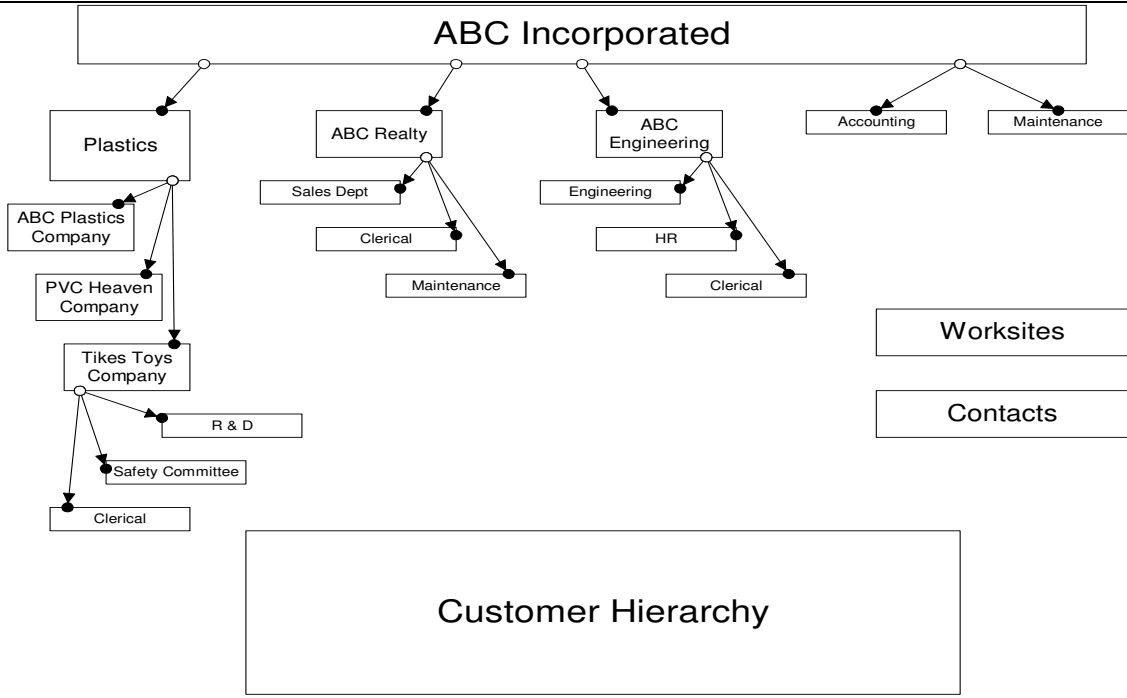
Record: 1 of 5

Dept	Cust Name	Sup/HireMqr	Branch	Sta
A/P	Crom Equipm	Fisher, Brenda	Memphis SE	H
A/R	Crom Equipm	Fisher, Brenda	Memphis SE	H
Accounting	Crom Equipm	Fisher, Brenda	Memphis SE	A
Human Resources	Crom Equipm	Williams, Leonar	Memphis SE	H
North Warehouse	Crom Equipm	Fisher, Brenda	Memphis SE	A

Record: 1 of 5

Last Name	First	Title	Phone	Dept
Fisher	Brenda	Vp	(561) 345-3463x 4	Primary
Mason	Joseph	Director c	() 23-4234x2342	Primary
Pugeot	Paul	Supervisc	(493) 499-4949	Primary
Richter	Jenny	Office Ma	(123) 456-7489	Primary
Walker	Albert	VP of Sal	(561) 998-7786	Primary

Record: 1 of 5



Refer to the flow chart to determine how the Customer should be set up when adding them into TempWorks. Keep in mind that anything that can be setup at the Corporate level can also be set up within each level below it (Invoicing styles, Invoicing setups, Contacts, Worksites, etc.). As Worksites and Contacts are entered into a Customer, make sure they are entered at the proper level.

Customer Address

Corporate and Billing Address

Within the Address Tab, enter the main address and, if necessary, the billing address of the Customer.

 The Billing Address only needs to be entered if it is different than the Main Address.

Visifile	Address	Invoicing	Message	Misc	Search	Switch
Basic		Sales and Service Information				
Customer Parent ID: <input type="text"/> Customer Id: <input type="text" value="10623"/> Status: <input type="text" value="Active"/> Customer: <input type="text" value="Crom Equipment"/> Department: <input type="text" value="Primary"/> Date Created: <input type="text" value="12/6/2001"/> Active Date: <input type="text" value="4/30/2007"/>			Billing Address (If Different) <input type="button" value="Copy Main Address"/> ATTN: <input type="text" value="Bob Smith"/> Street1: <input type="text" value="3300 Enterprise Drive"/> Street2: <input type="text" value="Suite 3"/> City: <input type="text" value="Fort Pierce"/> State: <input type="text" value="CA"/> Zip: <input type="text" value="34951"/> Country: <input type="text"/> Phone: <input type="text" value="(666) 466-7788x"/> Fax: <input type="text" value="(333) 455-2837"/> E-mail: <input type="text" value="dalyce@tempworks.com"/> Website: <input type="text" value="www.cromeq.com"/>			
Main Address Street1: <input type="text" value="3300 Enterprise Drive"/> Street2: <input type="text"/> City: <input type="text" value="Fort Pierce"/> State: <input type="text" value="FL"/> Zip: <input type="text" value="34950"/> Country: <input type="text"/>			Default Sales Taxes Sales Tax Goods: <input type="text" value="Portage"/> Sales Tax Serv: <input type="text"/>			
			Default WorkSite Worksite: <input type="text" value="Site #6"/> <input type="button" value="See"/>			

Other billing location information is also housed within this form such as the phone numbers, E-mail, Website addresses as well as the Status of this Customer (Active, Prospect, etc.).

Worksite Addresses

At the bottom of the Address/Basic sub tab there is a "See" button which will allow the user to view worksites associated with this customer. **The worksite is the physical location that the employee is going to work. The State drop down menu is very important because it is used in determining tax reciprocity for an employee's paycheck.**

CustomerAddress		<input type="button" value="Copy Main Address"/>	<input type="button" value="Copy Billing Address"/>	<input type="button" value="GetMap"/>
CustomerID: <input type="text" value="10623"/>	Directions	State: <input type="text" value="MNIncTax"/>		
AddrID: <input type="text" value="1884"/>	<input type="text" value="35E to Pilot Knob W to Main Street N"/>	County: <input type="text"/>		
Worksite: <input type="text" value="Site #6"/>		City: <input type="text"/>		
AttnTo: <input type="text"/>	Default Dress Code : <input type="text" value="Steel toed shoes, jeans, t-shirt"/>	School: <input type="text"/>		
Street1: <input type="text" value="498 Main Street"/>		SUTA: <input type="text"/>		
Street2: <input type="text"/>		Exempt <input type="checkbox"/> SD <input type="checkbox"/>		
County: <input type="text" value="Dakota"/>		City <input type="checkbox"/>		
City: <input type="text" value="Eagan"/>		Cnty <input type="checkbox"/>		
State: <input type="text" value="MN"/> Zip: <input type="text" value="55121"/>		SalesTxServ: <input type="text"/>		
School: <input type="text"/>		SalesTxGood: <input type="text"/>		
Country: <input type="text"/>				
Record: <input type="text" value="1"/> of 1 (Filtered)				

There is no limit to the number of Worksites that can be setup within a Customer record.
 If you are working in a state which taxes by municipality, county, city, etc. by keying in the zip code you will be prompted to choose the proper taxing code for that particular worksite.

By entering the Directions and Default Dress Code into the Worksite, the information will automatically appear on any Order created using this Worksite.

Opportunity Tracking

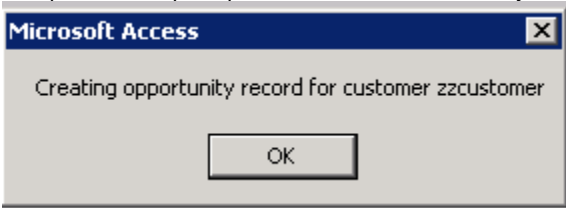
From the Customer/Visifile form, navigate to the Opportunity area by clicking Opportunity.

Visifile	Address	Invoicing	Message	Misc	Search	Switch		
Refresh	PlaceOrder	Invoices	Payments	ParentAcct	Worksites	DNA	Docs	Contract
TWTrack	SeeOrders	SeeAsgs	SalesHist	MasterView	Opportunity	Support		

In the upper left click on the New Record Button to create an opportunity record for the customer.

The screenshot shows the top navigation area with buttons for 'New Record', 'Refresh', 'PlaceOrder', 'Invoices', 'Payments', 'ParentAcct', 'Worksites', 'DNA', 'Docs', and 'Contract'. Below this is a search bar and a table with columns: Customer, Desc, Amount, Close Date, % Prob, NextStep, Competitor, Last Update, Stage, Branch, and Acct Mgr.

Tempworks will prompt the user to indicate if they wish to create a new opportunity record:

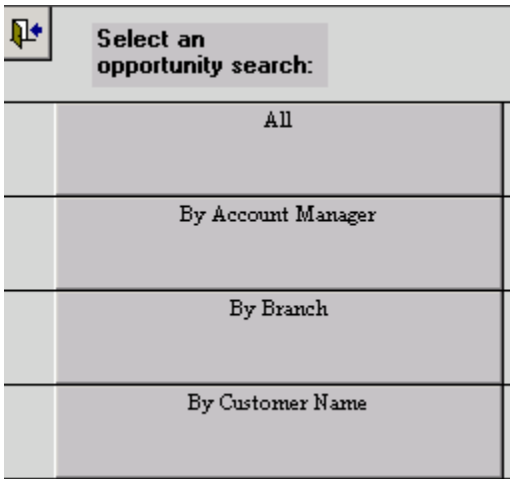


Click "Ok"; this will open the Opportunity Form.

The screenshot shows the 'Opportunity' form with the title '44 Opportunity'. It includes a 'See change log' button and a 'See' button next to a dropdown menu for 'Customer' (set to 'zcustomer'). There is a checked 'Active' checkbox. The form contains several input fields: 'OpportunityId' (44), 'Description' (Opportunity), 'Amount', 'CloseDate', 'StageId' (1), 'Probability' (0.00%), 'NextStep', 'Competitors', and 'BidDate'.

Fill in the Opportunity Form throughout the Sales process. This information will include the potential business from this Prospect, amount of revenue expected to be generated, stage of closing and the probability of closing the sale.

By clicking on the Search tab you can find the "Searches" button. Click on it to run searches for Opportunity records.



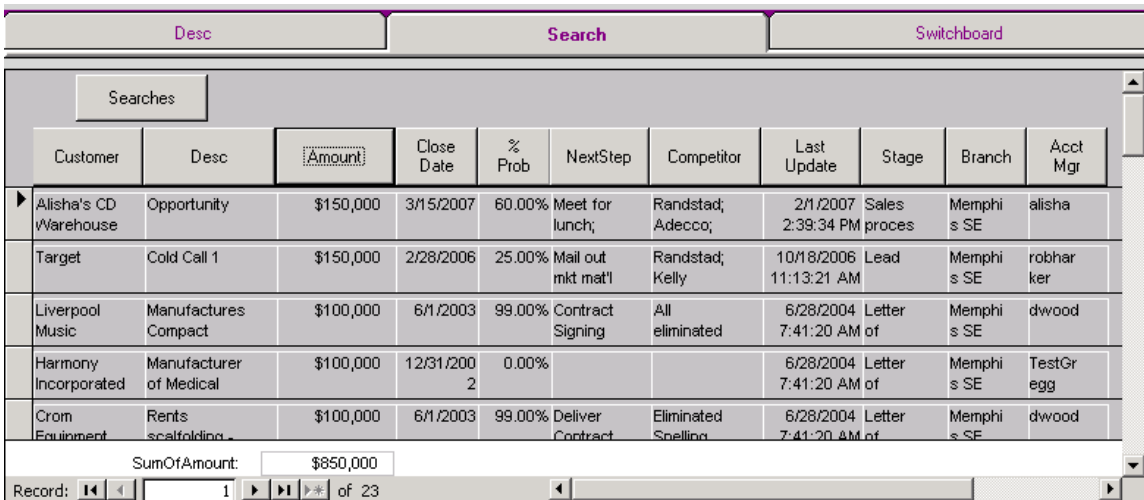
Click on the "All" button to view all customer opportunity records in Tempworks.

Click on the "By Account Manager" button to enter the username of the account manager and view only his or her opportunity records.

Click on the "By Branch" button to view opportunity records for an individual branch.

Click on the "By Customer Name" button to search for an individual opportunity record for a customer.


Searches will be displayed in the Search tab, double-click on a record to open it.



Once the record is open you can view and make changes as needed.

Invoicing Tab

Use the Invoicing Tab within the Customer to set up specific Invoicing requirements.

 Since anything set up at the Customer level can also be set up at each level within the Customer, each individual department can have its own Invoicing criteria.

Your company may offer several different styles of Invoices. Each Customer (Department) may have its own Invoice style. Select the Invoice Style by using the drop down field to select the desired Style. By selecting different Invoice Styles the look and feel of the Invoices will be different.

If your Customer wants more than one copy of their Invoice, select the number of Invoices they wish to receive by choosing the proper Invoice Count within the Invoice Count field.

Separate Invoices By: As Customers are becoming more demanding in how they receive their Invoices, it is important to select the proper Separate Bys. Your choices include; Department, Aident (Unique Tempworks ID for employee), Weekending, Cost Center, Purchase Order number, Division (type of worker: Clerical, Industrial, Hospitality, Technical, etc.), Supervisor, SubEntity, Branch of your company which serviced them, Worksite, Skill Code (Job title), or Department Address. Click any which apply to how the Customer wants to separate their Invoices. By selecting different separations, there will be a different Invoice number for each selection within the Separate Invoices By.

Consolidate Invoice w/ Parent: Use this box to indicate where the Invoice should be sent. If you are working within a Department and that Department wants to receive their Invoice, leave this box unchecked. If the Department does not care to see the Invoice but wants it sent “up the line”, click this box and the Invoice will be sent to the next level up within the Customer Hierarchy.

Adding Departments

Keep in mind that Department/Division/Child are all interchangeable terms for the purpose of setting up a Customer file.

Departments are added via the Customer/Visifile form.

Department List

▶*	All	Dept	Cust Name	Sup/HireMqr	Branch	Sta
	A/P	Crom Equipm	Fisher, Brenda	Memphis SE	H	
	A/R	Crom Equipm	Fisher, Brenda	Memphis SE	H	
	Accounting	Crom Equipm	Fisher, Brenda	Memphis SE	A	
	Human Resources	Crom Equipm	Williams, Leonar	Memphis SE	H	
	North Warehouse	Crom Equipm	Fisher, Brenda	Memphis SE	A	

Record: 1

Add a new level by clicking on the New Record Button. A prompt will appear asking for the new Department name.

This will add the new Department.

All information set up within the Customer will be inherited by all new Departments created. That information can be changed to fit what each specific Department requires. To view and edit information for any Department, click on the binoculars to the left of the Department you wish to view.

Contacts

Contacts are those people who are internal staff of your Customer. Contacts can also be any other person with whom you have contact such as members of organizations to which you belong.

Contacts can be added several ways within TempWorks, including through the Customer Visifile.

Adding a Contact via the Customer

From the Visifile Form within the Customer there is a section that lists all of the Contacts affiliated with that Customer. To add a new Contact, click on the "Pencil Exclamation Point" within the Contact Section.

Customer Contacts

▶*	Last Name	First	Title	Phone	Dept
	Fisher	Brenda	Vp	(561) 345-3463x 4	Primary
	Mason	Joseph	Director c	() 23-4234x2342	Primary
	Pugeot	Paul	Supervisc	(493) 499-4949	Primary
	Richter	Jenny	Office Ma	(123) 456-7489	Primary
	Walker	Albert	VP of Sal	(561) 998-7786	Primary

Record: 1

Tempworks will navigate the user to the following page where the Last Name, First Name, Title, Main Contact Number, and Email can be entered. To go to the full contact record click on the "See Contact" button to the left .

The screenshot shows a contact record form with the following fields: Last Name, First, Title, Phone, Email, Address Descriptor, and Invoice Email. Below these fields are input boxes for 'Active' and 'Status'. A 'See Contact' button is located on the left side, and a 'Memo' field is positioned below the 'Status' dropdown.

Navigate to the Misc/Misc Setup/Roles form to assign Roles to the Contacts. These Roles are in relation to how the Contact interacts with your company.

The screenshot displays the 'Misc Setup/Roles' form. It features a navigation bar with tabs for 'Visifile', 'Address', 'Invoicing', 'Message', 'Misc', 'Search', and 'Switch'. Under the 'Misc' tab, there are sub-tabs for 'Misc Setup', 'Reports', and 'Interview'. The 'Misc Setup' sub-tab contains buttons for 'Roles', 'Interest Codes', 'Vendor Mgmt', and 'AsgAdjustments'. The main area is titled 'Setup default contacts/roles for this customer' and is divided into three sections: 'Roles' (listing Hiring Mgr, HR Coordinator, Ordered By, Report To, Vendor Acct Mgr), 'People' (listing Fisher, Brenda [561] 345-3463x4, Mason, Joseph 2342342342, Pugeot, Paul (493) 499-4949, Richter, Jenny (123) 456-7489, Walker, Albert (561) 998-7786, and Walter, William (561) 896-5566), and an 'Assign Role' button. Below these sections is a table for assigning roles to contacts.

Type	Lookup	ContactName
Vendor Acct Mgr		Fisher, Brenda (561) 345-3463x4
Report To		Holcomb, Jim (561) 466-7788x
Ordered By		Holcomb, Jim (561) 466-7788x
HR Coordinator		Holcomb, Jim (561) 466-7788x
Supervisor		Williams, Leonard (561) 345-3463x4
*		

The roles can streamline the process of placing orders since the Ordered by, Supervisor and Report to Contacts will automatically populate on each Order for this Customer/Department.

To assign a role to a Contact - click to highlight the role on the left side of the form, click to highlight the Contact name on the right side of the form, click the Assign role button in the middle. The Contact Type and Name will appear at the bottom of the form.

Financial Information

Financial Information can be accessed in many different areas within TempWorks. One way is within the Customer record. From the Customer/Visifile tab there are several shortcut buttons to view financial information.

The screenshot shows the financial information section with a grid of buttons: Refresh, PlaceOrder, Invoices, Payments, ParentAcct, Worksites, DNA, Docs, Contract, TWTrack, SeeOrders, SeeAsgs, SalesHist, MasterView, Opportunity, and Support. Below the buttons is a table of financial data.

Status:	A	RBal:	3,042,816	CredLim:	25,000	RSales12M:	3,142,256
AR Bal:	16,897	RDue:	3,022,019	Sales12M:	2,941	RSalesYTD:	3,142,256
Past Due:	2,360	LPay:	10/5/2007	Sales YTD:	2,941	RLifeSales:	3,142,256
Branch:	Memphis SE						

Displayed on the Visifile of the Customer are the Credit limit and Accounts Receivable information for the Customer.

The Invoices button will automatically navigate you to a list of Invoices for this Customer.

		Over 90:	\$307.51	Over 30:	\$307.51	Total:	\$307.51	Inv w/ notes	Summary	Inv#
	Inv#	InvAmt	InvDate	DueDate	BalAmt	CustName	Branch			
See Inv	100023	\$1,440.00	5/23/2007	6/12/2007	\$0.00	Crom Equipment	Memphis SE			
See Inv	100024	\$1,440.00	5/23/2007	6/12/2007	\$1,440.00	Crom Equipment	Memphis SE			
See Inv	100015	\$720.00	5/18/2007	6/7/2007	(\$720.00)	Crom Equipment	Memphis SE			
See Inv	100016	\$720.00	5/18/2007	6/7/2007	(\$720.00)	Crom Equipment	Memphis SE			
See Inv	100017	\$1,450.00	5/18/2007	6/7/2007	\$0.00	Crom Equipment	Memphis SE			
See Inv	100006	\$426.00	5/15/2007	6/4/2007	(\$426.00)	Crom Equipment	Memphis SE			
See Inv	44670	\$587.61	4/28/2007	5/18/2007	\$0.00	Crom Equipment	Memphis SE			
See Inv	44656	\$667.97	4/27/2007	5/17/2007	\$667.97	Crom Equipment	Memphis SE			
See Inv	44657	\$274.40	4/27/2007	5/17/2007	\$274.40	Crom Equipment	Memphis SE			
See Inv	44546-1	(\$140.88)	4/20/2007	5/10/2007	\$140.88	Crom Equipment	Memphis SE			

The Payments button will list all payments made by this Customer.

		Filter by Action:								
	Cust#	Inv#	Pay Date	Inv Date	Action	Check#	PayAmount			
See Invoice	10623	100006	10/5/2007	5/15/2007	Payment	Check #	\$426.00			
See Invoice	10623	100015	10/5/2007	5/18/2007	Payment	Check #	\$720.00			
See Invoice	10623	100016	10/5/2007	5/18/2007	Payment	Check #	\$720.00			
See Invoice	10623	100017	10/5/2007	5/18/2007	Payment	Check #	\$1,450.00			
See Invoice	10623	100023	10/5/2007	5/23/2007	Payment	Check #	\$1,440.00			
See Invoice	10623	100015	10/5/2007	5/18/2007	Payment	Check #	\$720.00			
See Invoice	10623	100006	10/5/2007	5/15/2007	Payment	Check #	\$426.00			
See Invoice	10623	100016	10/5/2007	5/18/2007	Payment	Check #	\$720.00			
See Invoice	10623	44540	4/28/2007	2/11/2007	Payment	Check #	\$465.70			
See Invoice	778105	44546-1	4/28/2007	4/20/2007	Payment	Check #	(\$140.88)			
See Invoice	778105	44670	4/28/2007	4/28/2007	Payment	Check #	\$587.61			
See Invoice	10623	44542	4/25/2007	2/11/2007	Payment	Check #	\$465.70			
See Invoice	778105	44545	4/25/2007	2/11/2007	Payment	Check #	\$587.61			

Sales History will list the history of sales (Very similar to the Employee's Pay History.).

Requery Crom Equipment 10623 (666) 466-7788x														
Start Date: 8/22/2007		End Date: 11/20/2007		Total Bill: 3,022,828.45			Total Hours: 557							
WEDate	WEBill	Last Name	Pay	AdjNet	BiAdj	Rhrs	Dhrs	Dhrs	Gross	PayCost	Bill	TBill	Skill	
5/13/2007	5/13/2007	Nolan, Rumble	\$50.00	\$0.00	\$0.00	20	0	0	\$1,000.00	\$1,125.80	\$72.50	-1,450.00	A500	
4/22/2007	4/22/2007	Hinkl, Matthew L	\$20.00	\$0.00	\$0.00	8	0	0	\$160.00	\$178.93	\$35.00	\$274.40	A048	
4/22/2007	4/22/2007	Bailey, Brian John	\$15.00	(\$30.00)	\$0.00	0	0	0	\$148.48	\$136.05	\$22.50	\$0.00	B015	
4/22/2007	4/22/2007	Reimb, Tool	\$10.00	\$0.00	\$0.00	40	0	0	\$400.00	\$438.40	\$14.99	\$587.61	A500	
4/22/2007	4/22/2007	Alabama, Nick A	\$11.75	\$0.00	\$0.00	25	0	0	\$293.75	\$312.14	\$17.04	\$426.00	B015	
4/15/2007	4/22/2007	Alabama, Nick A	\$11.75	\$0.00	\$0.00	40	0	0	\$470.00	\$499.41	\$17.04	\$667.97	B015	
3/11/2007	3/11/2007	Garnish, Joe	\$9.00	\$0.00	\$0.00	0	0	0	\$0.00	\$0.00	\$11.88	\$15.30	B053	
3/11/2007	3/11/2007	Hinkl, Matthew L	\$20.00	\$0.00	\$0.00	39	0	0	\$780.00	\$872.27	\$35.00	-1,392.30	A048	
1/14/2007	3/11/2007	Barker, Shannon	\$13.00	(\$12.00)	\$0.00	-40	0	0	\$293.75	(\$590.21)	\$0.00	\$0.00	B015	
1/14/2007	3/25/2007	Alabama, Nick A	\$0.00	\$0.00	\$0.00	-40	0	0	\$0.00	\$0.00	\$18.85	(\$769.08)	B015	
1/14/2007	3/25/2007	Alabama, Nick A	\$0.00	\$0.00	\$0.00	30	0	0	\$0.00	\$0.00	\$18.85	\$576.81	B015	
1/14/2007	3/25/2007	Barker, Shannon	\$0.00	\$0.00	\$0.00	-40	0	0	\$0.00	\$0.00	\$20.00	(\$816.00)	B015	
1/14/2007	3/25/2007	Barker, Shannon	\$0.00	\$0.00	\$0.00	35	0	0	\$0.00	\$0.00	\$18.75	\$669.38	B015	
1/14/2007	1/14/2007	Abbott, sam J	\$14.00	\$12.00	\$0.00	40	0	0	\$560.00	\$634.98	\$20.30	\$795.76	H004	
1/14/2007	1/14/2007	Becket, Sam J	\$9.00	\$12.00	\$0.00	40	0	0	\$360.00	\$415.50	\$11.88	\$256.13	B053	
1/14/2007	1/14/2007	Garnish, Joe	\$9.00	\$12.00	\$0.00	40	0	0	\$360.00	\$419.48	\$11.88	\$256.13	B053	
1/14/2007	1/14/2007	Abron, Jill	\$9.00	\$12.00	\$0.00	40	0	0	\$360.00	\$417.56	\$11.88	\$256.13	B053	
1/14/2007	1/14/2007	Dobbins, Donnie	\$0.00	\$12.00	\$0.00	40	0	0	\$0.00	\$12.00	\$0.00	\$0.00	A500	
1/14/2007	1/14/2007	Alabama, Nick A	\$,000.00	\$12.00	\$0.00	40	0	0	\$20,000.00	71,487.98	\$,850.00	\$6,886.12	A352	
1/14/2007	1/14/2007	Alabama, Nick A	\$11.75	\$12.00	\$0.00	40	0	0	\$470.00	\$495.81	\$17.04	\$667.97	B015	
1/14/2007	1/14/2007	Alabama, Nick A	\$13.00	\$0.00	\$0.00	40	0	0	\$520.00	\$530.96	\$18.85	\$738.92	B015	

Contacts Tab

Adding a new Contact

From the main Contact Tab on the Switchboard, click the New Record button.



This will open the Contact Quick Add form.

▶*
Exit without creating record
Contact Quick Add

Cust Lookup:

Click here to add a new customer

Company:

Department:

First Name: Nickname:

Last Name: Mr/Ms:

Title:

Lkp Addr:

Street1:

City: State: TN

Zip: Country:

Status: Type:

Phone:

E-mail:

Enter all necessary information. If the Contact is affiliated with a current Customer, use the Cust Lookup to attach this Contact to the Customer record. A Contact does not require a Customer affiliation.

Once all information is entered, click Go to full contact record button. This will open the record for this Contact within the Contact area of TempWorks.

Contact Interest Codes

Interest Codes can be added to Contact records. The Interest Codes would include any skill that a particular Contact may look for in an Employee. This enables Service Reps to proactively sell the Applicants and Employees who may call in available.

Interest Codes can be added or viewed from the Contact Visifile screen.

** G Company Lkp: Last Name Lkp: Mason, Joseph
 Crom Equipment 2342342342
 Inactives:

Visifile Address Message Misc Report Search Switchboard

Refresh See Customer Synchron Outlook WebSetup Chg #s Contact Methods

Company: Crom Equipment Status: A
 Branch: Memphis SE Date: 5/6/2005
 Email: alisha@tempworks.com Title: Director of HF

Msg Date	Action	Message	Rep	DateDue	Completed?
10/19/2006	1st Interview	10:00am	robharker	10/31/2006	A <input checked="" type="checkbox"/>
10/18/2006	Message	Personal call summary:	robharker	10/20/2006	A <input checked="" type="checkbox"/>
4/12/2006	Email	Candidate Resumes for Order # 4379	dwood		A <input type="checkbox"/>

Record: 1 of 3

** Interest Code PersonalCallDate Summary
 ACT! 10/18/2006 917 57
 CAD Operator Draftir

Record: 1 of 1

Click on the New Record button to navigate to the Interest Code add form as shown below:

View codes of type: Select code

Lkp	InterestCode	Note
▶	ACT!	
*	CAD Operator Drafting	

Add Interest Codes by using the Look up field or by viewing codes by type and then clicking on a code in the box to the right to select it and add it to the list.

Personal Sales Call

Personal Sales Calls are usually considered any Sales Call which is face-to-face with a Contact.

Personal Sales Calls are logged in the Contact/Misc/Personal Call tab.

** G Company Lkp: Last Name Lkp: Mason, Joseph
 Crom Equipment 2342342342
 Inactives:

Visifile Address Message Misc Report Search Switchboard

Orders Groups Document Personal Call Job References

ContactPersonalCall

Contact Personal Call

Date of Call: 10/18/2006 **DepartmentName:** Primary

Service Representative: robharker **Position:**

CompanyName: Crom Equipment **Address:** 3300 Enterprise Drive

LastName: Fisher **City:** Fort Pierce

FirstName: Brenda **Office Phone:** (561) 345-3463x4

Specific Call Objective:

Call Summary: set up lunch

Anticipated Future Needs: assemblers in January

Commitment Received:

Suggested FollowUp:

Other Relevant Call Data (Collateral Left, Etc):

Record: 1 of 1

Fill out all necessary information pertaining to the Personal Call and it will log a message on the contact's record as well as being displayed in the Contact Visifile Personal Call area.

Personal Calls can be printed out by date range from the Contact/Reports Tab.

Contact Groups

Any group of Contacts can be included in a Contact Group. The Contact Group can be used to manage Target accounts, sales campaigns, letter campaigns, etc.

To set up a Contact Group, run a search for the Contact you would like to include in the Group. From the Search Result screen, click Setup a Contact Group.

Visifile	Address	Message	Misc	Report	Search	Switchboard																																																																													
<p>Setup a Contact Group Run a search Limit to Revert to previous list Print</p> <p>Where CompanyName Like "crom" And Active=true</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Company</th> <th>Dept</th> <th>Title</th> <th>S</th> <th>LastMsg</th> <th>#Msgs</th> <th>Other</th> <th>OfficePhone</th> <th>Branch</th> <th>Cust#</th> </tr> </thead> <tbody> <tr> <td>▶ Fisher, Brenda</td> <td>Crom Equipment</td> <td>Primary</td> <td>Vp</td> <td>A</td> <td>5/16/2007</td> <td>48</td> <td>Fort Pierce 34950</td> <td>(561) 345-3463x4</td> <td>Memphis SE</td> <td>10623</td> </tr> <tr> <td>Mason, Joseph</td> <td>Crom Equipment</td> <td>Primary</td> <td>Director o</td> <td>A</td> <td>10/19/200</td> <td>3</td> <td>Denver 32424</td> <td>(234) 234-2342</td> <td>Memphis SE</td> <td>10623</td> </tr> <tr> <td>Pugeot, Paul</td> <td>Crom Equipment</td> <td>Primary</td> <td>Supervisc</td> <td>A</td> <td></td> <td></td> <td>Fort Pierce 34950</td> <td>(493) 499-4949</td> <td>Memphis SE</td> <td>10623</td> </tr> <tr> <td>Richter, Jenny</td> <td>Crom Equipment</td> <td>Primary</td> <td>Office Ma</td> <td>A</td> <td></td> <td></td> <td>Fort Pierce 34950</td> <td>(123) 456-7489</td> <td>Memphis SE</td> <td>10623</td> </tr> <tr> <td>Walker, Albert</td> <td>Crom Equipment</td> <td>Primary</td> <td>VP of Sal</td> <td>A</td> <td></td> <td></td> <td>Fort Pierce 34950</td> <td>(561) 998-7786</td> <td>Memphis SE</td> <td>10623</td> </tr> <tr> <td>Walker, William</td> <td>Crom Equipment</td> <td>Primary</td> <td>Mail Roor</td> <td>A</td> <td>5/10/2007</td> <td>1</td> <td>Fort Pierce 34950</td> <td>(561) 896-5566</td> <td>Memphis SE</td> <td>10623</td> </tr> </tbody> </table>							Name	Company	Dept	Title	S	LastMsg	#Msgs	Other	OfficePhone	Branch	Cust#	▶ Fisher, Brenda	Crom Equipment	Primary	Vp	A	5/16/2007	48	Fort Pierce 34950	(561) 345-3463x4	Memphis SE	10623	Mason, Joseph	Crom Equipment	Primary	Director o	A	10/19/200	3	Denver 32424	(234) 234-2342	Memphis SE	10623	Pugeot, Paul	Crom Equipment	Primary	Supervisc	A			Fort Pierce 34950	(493) 499-4949	Memphis SE	10623	Richter, Jenny	Crom Equipment	Primary	Office Ma	A			Fort Pierce 34950	(123) 456-7489	Memphis SE	10623	Walker, Albert	Crom Equipment	Primary	VP of Sal	A			Fort Pierce 34950	(561) 998-7786	Memphis SE	10623	Walker, William	Crom Equipment	Primary	Mail Roor	A	5/10/2007	1	Fort Pierce 34950	(561) 896-5566	Memphis SE	10623
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This will open the Contact Group Form.

The screenshot shows the '53 NewGroup' form. At the top, there are fields for 'GroupId # Lkp:' (value: 53) and 'GroupDesc:' (value: West Group), along with a 'View active' button. Below this is a tabbed interface with tabs for 'Desc', 'Members', 'Letters', 'MiscMsg', 'Directory', and 'Switchboard'. The 'Desc' tab is active. In the 'Desc' tab, there is an 'Active:' checkbox (checked), a 'Groupid:' field (53), a 'GroupDescription:' field (West Group), and a 'DateStarted:' field (11/20/2007 10:07:31 AM). There are two buttons: 'Return to Contacts Screen' and 'Delete this group and its members.'. A 'Message:' field is also present with a text area and a dropdown menu. Below the message field is another button: 'Flag group members as having this follow-up task completed.' with a dropdown menu.

To create a new Group, click on the New Record button. In the Group Description field name your Group.

To add Members click on the Members Tab.

The screenshot shows the 'Members' tab of the '53 NewGroup' form. At the top, there are two buttons: 'Add current contact to group' and 'Add all contacts in contact directory screen to group'. Below these buttons is a table with the following columns: Name, Company, Phone, Email, Date, and Removed. The table contains several rows of contact information.

Name	Company	Phone	Email	Date	Removed
Fisher, Brenda	Crom Equipment	(561) 345-3463x4	BrendaF@Crom.com	11/20/2007	<input type="checkbox"/> See contact
Mason, Joseph	Crom Equipment	2342342342	alisha@tempworks.com	11/20/2007	<input type="checkbox"/> See contact
Pugeot, Paul	Crom Equipment	(493) 499-4949	ppeugeot@madeupemail.c	11/20/2007	<input type="checkbox"/> See contact
Richter, Jenny	Crom Equipment	(123) 456-7489	jrichter@yoohoo.com	11/20/2007	<input type="checkbox"/> See contact
Walker, Albert	Crom Equipment	(561) 998-7786		11/20/2007	<input type="checkbox"/> See contact
Walter, William	Crom Equipment	(561) 896-5566		11/20/2007	<input type="checkbox"/> See contact
*					<input type="checkbox"/> See contact

To add the Contacts within your Search Results form, click on the button labeled Add all contacts in contact directory screen to group.

Members can also be added individually by looking up the Contact you would like to add and then navigating to the Group in which you would like to add them to. Within the Members form click on the button labeled Add current contact to group.

Once the Contact Group is set up, Activities can be logged and completed for the entire Group with one action. From the Desc form, Enter the Message you would like to add to the Activity, select the Action for the Activity and then click Create follow-up tasks of this action for group members. TempWorks will prompt you for the Date on which you would like the Activities scheduled.

This will create an Activity for each Member of your Group.



Once the Activity has been completed, choose an Action code for the completed Activities and click Flag group members as having this follow-up task completed.

This will indicate any Activity with the chosen Action code as complete.

Messages

Messaging is what TempWorks considers the “Glue that holds it all together.” Good communication is the key.

Where applicable, Messages may be entered in and/or linked to the Employee, Contact, Customer, Order, Paycheck, and Invoice. There is no limit to the number of different areas you can link your message to. When logging sales related messages, you will most likely be working closely with Contacts.

-  If a Message is linked to an Order or a Contact, that message will automatically be linked to the affiliated Customer.
-  If the Message is to be linked to an Order, it is easiest to begin the Message within the Order.

The steps in logging Messages are as follows:

Step 1:

Determine what entities are involved for the message you would like to log– Order, Employee, Customer, Contact, Invoice and/or Check. For instance:

- If having lunch with a prospect – the message should be logged within the Contact.
- If noting a performance issue – the message should be logged within the Contact, Employee and the Order.
- If a Contact is disputing an Invoice – the message should be logged within the Contact and Invoice.

Step 2:

Look up the Employee, Order, Customer, Contact, Invoice or Check associated with the message.

Click on the Message tab.

Step 3:

Click the New Record button from within the Message tab.

Step 4:

Associate the message with an action. Use the drop down arrow and scroll the list until you find the action that best suits the message. The Action categorizes the Message.

Step 5:

If appropriate, enter additional information pertaining to the message into the text box.

Step 6:

Also, if appropriate, link this message to the appropriate areas where you would like the message to be visible.

Activity Planner

The TempWorks Activity Planner is closely linked to Messages in that any Message can be turned into an Activity. The Activity Planner can assist everyone from the Sales Person to a Staffing Coordinator to the CEO of your company.


Where applicable, Activities can optionally be linked to Employees, Customers, Contacts, Orders, Invoices and Paychecks. But Activities do not have to be linked to anything at all, such as personal appointments, Chamber of Commerce meetings, etc.

Adding Activities

The easiest way to log an Activity is to simply enter a due date directly into any Message. Double-click in this field to bring up the calendar and select the date.

This will automatically add the Message to your Activity Planner on the date specified.

Another way to add an Activity is to access the Activity Add Anything form.

 Use this method to add an Activity which will not be linked to anything else within TempWorks-
Stand Alone Activities

There are two ways to access the Activity Add Anything form:

1. On your keyboard press F12.
2. Click on the Activity button from the Workflow Toolbar.

Once the Activity planner is open, click on the Add Activity button.

Refresh			
Link to Emp:	Act	ID:	
Link to Contact:		Employee:	
Activity	Message	CustomerId:	
Employee:		Action:	message
Contact:		<input type="button" value="Create Outlook Item"/> <input type="button" value="Link to Order Now Open"/> <input type="button" value="Copy message"/> <input type="button" value="Don't create this activity"/> <input type="button" value="Open activity planner"/> <input type="button" value="Done"/>	
DateDue	11/20/2007		
Complete	<input type="checkbox"/>		
DateComplete			
PartyResponsible	alisha		
Customer Name:			
OrderId:			
Priority			
TimeAllotted			
Message			

To link the activity to an Employee or Contact, look up the name on the left columns (first few letters of the Employee's last name) and choose the name from the drop down list.

To link the activity to an order, select 'Link to Order Now Open.'
Using this feature will link the Activity to the Order now open within TempWorks.

TempWorks will automatically populate the activity information in the Employee, Contact and/or Order Number areas as applicable. The Customer Name will automatically populate when linking to Contact and/or Orders.

Select the appropriate **Activity** type from the activity drop down list.

Edit or Enter the **Date Due** (Double-click to bring up the calendar and select the date).

Select the **Party Responsible** for the activity.
The user login will default.

If desired, enter a **Priority**.
The list of Activities can be sorted by priority.

If desired, enter a **Time Allotted**.

Finally, enter the Activity **Message**.

Once complete, click Done to add this Activity to your Activity Planner.

The information added as an Activity will show in the messaging area of all linked records; employee, contact, order, etc.

Copying and Editing Activities/Changing the Party Responsible

Within the Activity Planner, Activities can be edited or copied as needed.

There are two buttons to the left of the Activities.

Use the Edit button:



To change any information on an existing Activity, click the edit button. The Activity Add Quick form will open. Make any necessary changes then click the Done button.

Use the Copy button:



To copy an existing Activity, click the copy button. The Activity Add Quick form will open to display the new copy. Make any necessary changes then click the Done button. Your new copy has been made leaving the old Activity in the original format.

Navigating using the Activity Planner

Navigation is easy within the Activity Planner.

Activity	Party Responsible	Emp/Appl	Contact	Customer	Date Due	<input type="checkbox"/>	Phone#	Comment
Follow Up	alisha	Barnes, Stephe	Reed, Judy	Once Thoug	11/20/2007	<input type="checkbox"/>	(954) 654-4125	Follow up on interview.

If an Activity is linked to an Employee, or Contact you can navigate to either of those records by double clicking directly on the name of that record.

Completing an Activity

Once an Activity has been completed, indicate that on the Activity by clicking so a check mark shows in the Check Box.

Activity	Party Responsible	Emp/Appl	Contact	Customer	Date Due	<input checked="" type="checkbox"/>	Phone#	Comment
Follow Up	alisha	Barnes, Stephe	Reed, Judy	Once Thoug	11/20/2007	<input checked="" type="checkbox"/>	(954) 654-4125	Follow up on interview.

If the Activity is not completed on the day it is scheduled, that Activity will show each day on your Activity Planner until you complete it.

Workflow Toolbar Activities

Always keep an eye on your Workflow Toolbar. The Activity button will indicate how many Activities are scheduled for today.



Orders Tab

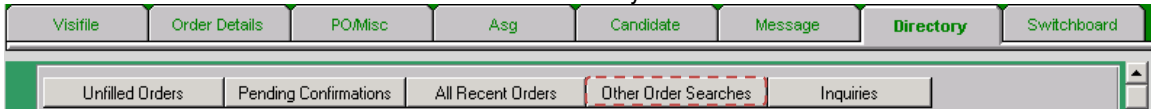
Accessing Orders

Within the Orders tab from the Switchboard all Orders can be monitored.

Orders for a specific Customer can be looked up by the Customer Name in the CustName Lkp field.

CustName Lkp:	Order# Lkp:
<input type="text"/>	<input type="text"/>

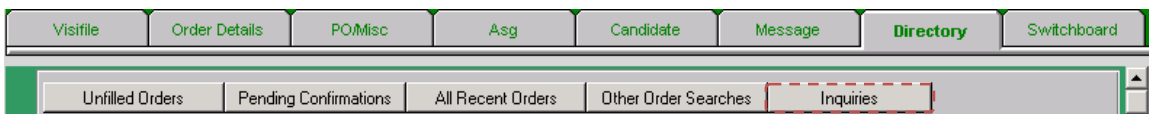
Other searches can be conducted from the Orders/Directory Tab.



Clicking on Other Order Searches will display several template searches including a brief explanation of the search.

Select a Search:		Return to search result screen
Busline	shows all orders with busline in their directions field	
Closed Orders with Open Assignments	shows all orders with the status of Closed which have employees still assigned	
Custname/DeptName/Status	Customer name/department name/order status search	
Customer#	Searches the customernumber	
Description search	Searches the order descriptions for any wildcard pattern	
Master orders	Find master orders for customer name	

Staffing Coordinators are instructed to flag any call where a Prospect/Customer is calling for pricing as an Inquiry. Look up the **Inquiries** by clicking on the Inquiries button.



Documents

Documents can be stored within TempWorks. These documents can include, but are not limited to, marketing materials, resumes, contracts, employee evaluations, employee handbooks, TempWorks manuals, etc. There is no limit to the number of documents which can be stored.

There are four areas in which to store documents (where a document is stored is dependant upon the type of document): Associate, Customer, Contact and the General Documents tab. Once the document is housed within any of these areas, steps in working with the documents are the same.

Adding Documents

Documents can be loaded from different areas depending on the nature of the Document:

- Associate/Visifile
- Customer/Visifile
- Contact/Misc/Document
- General Documents tab

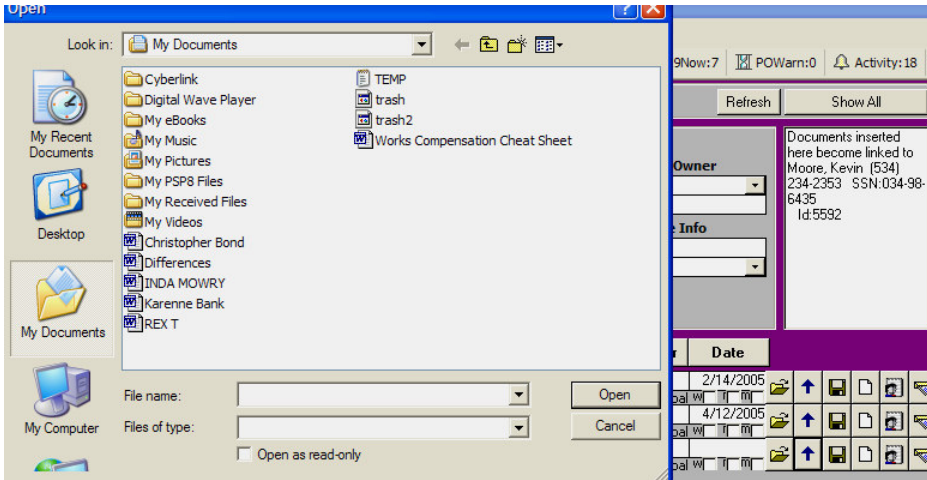
From any of these areas open the documents form.

Doc Name	Doc Type	Original File Name	Description	Type	Ver	Date	
→	Resume	MarshaJ.rtf	Creating New Document	rtf	1	04/12/05	
→	Resume	Steve_Smock.doc	Steve Smock Resume	doc	1	02/07/05	
▶							

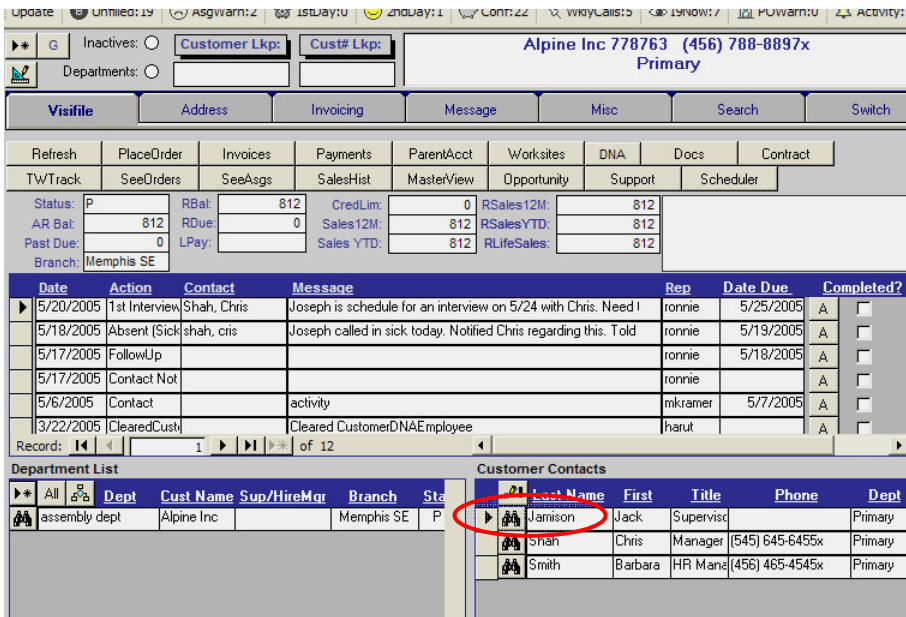
Manage the documents by (1) opening the file to preview, (2) **uploading the file to the server**, (3) saving the file to a disk, (4) creating a new file, (5) View Document Owner(s) and (6) attach this file to e-mail.

The Documents form is not limited to resumes or employee records. Other documents can also be stored here, such as employee evaluations, certifications, etc. Documents can also be stored in the Customer, Contact or General Documents areas of TempWorks.

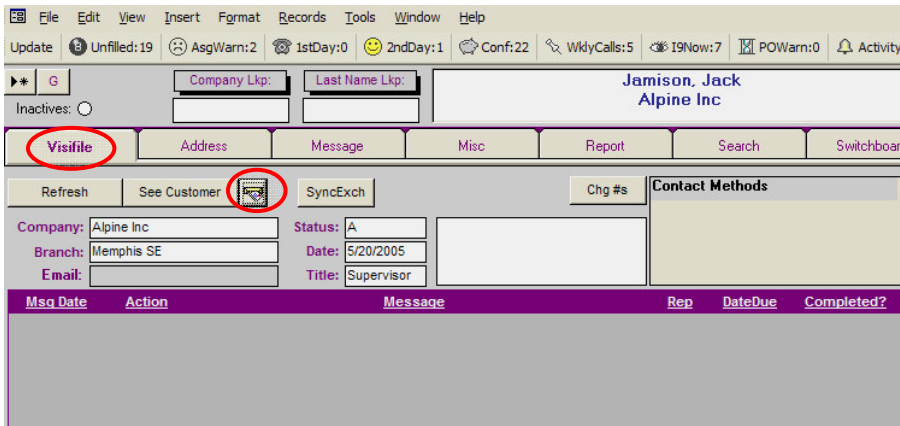
The Upload Files Up Arrow button will open the documents on the hard drive. Choose one for attaching to the employee record.



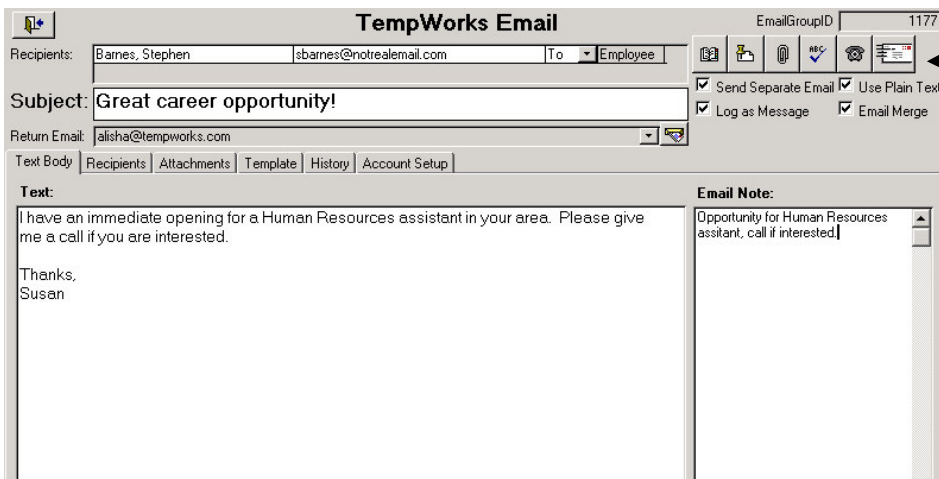
To send an email from the Contact tab, first look up the contact you want to send the email to. If you know the customer but forgot the name of the contact, look up the customer first and click on the Binoculars button to get to the contact record the email should go to.



If the contact name is known, go to the Contact tab and click on the email icon from the Visifile, to send an email.



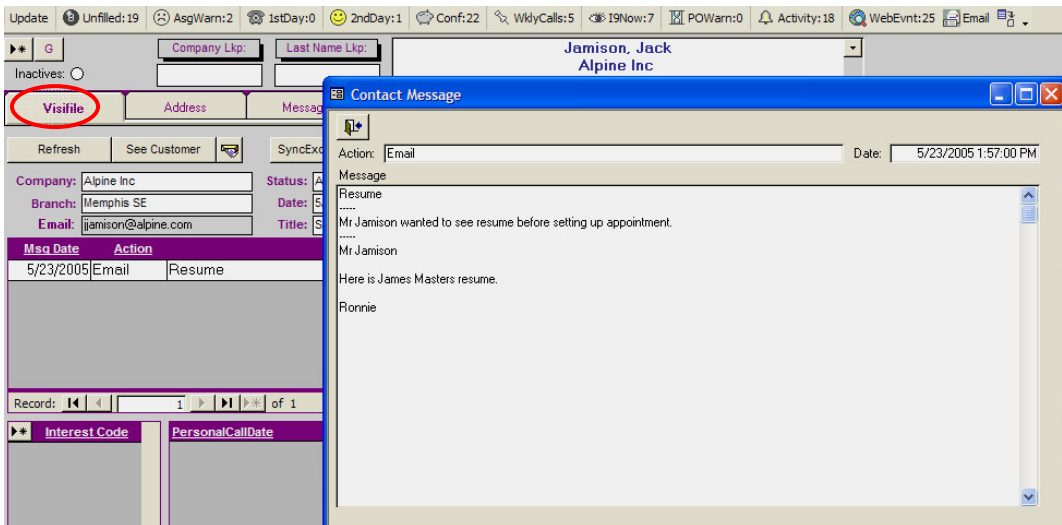
The Tempworks email will open.



Click here to send email.

This message will be logged in Stephen Barnes' file.

Here is the logged message from in the Contact tab, in the Visifile tab. Double clicking will show both the message and the message note.



If this email is to be sent to other recipients, click the Recipients button and look up the recipient's name. Here, we needed to find a John Smith to send the email to. Look up the last name by putting the letters "smi" in the last name box to get all contacts with a last name that starts with those letters. We can then choose the recipient we want to send an email to.

TempWorks Email EmailGroupID 1177

Recipients: Barnes, Stephen | sbarnes@notrealemail.com | To | Employee
 Alabama, Nick | | To | Employee

Subject: **Great career opportunity!**

Return Email: saishah@tempworks.com

Send Separate Email Use Plain Text
 Log as Message Email Merge

Text Body | **Recipients** | Attachments | Template | History | Account Setup

Recipient Search: Email Source: **Employee**
 LastName: | First Name: | Inactives

Search Results:

Aidnt	LastName	FirstName	Email	Company	Add All
5088	Dr. Emmanuel	Joe			Add
5091	Allen	Donna			Add
5100	Everest	Susie	Susie@sue.com		Add
5112	Franklin	Susie	Susie@sue.com		Add
5113	Gallaher	Malt			Add

Recipient List: Select All | Deselect All | Deselect Missing and Malformed Addresses | Refresh

Sel	Email	Recipient Name	LastName	FirstName	To	Sent	Source
<input checked="" type="checkbox"/>	sbarnes@notrealemail.com	Barnes, Stephen	Barnes	Stephen	To		Employee
<input checked="" type="checkbox"/>		Alabama, Nick	Alabama	Nick	To		Employee
<input checked="" type="checkbox"/>	mkramer@tempworks.com	Barker, Shannon	Barker	Shannon	To		Employee
<input checked="" type="checkbox"/>		Bende, Susie	Bende	Susie	To		Employee
<input checked="" type="checkbox"/>		Davis, Susie	Davis	Susie	To		Employee
<input checked="" type="checkbox"/>	Susie@sue.com	Franklin, Susie	Franklin	Susie	To		Employee

The recipient will see the email as if it was sent only to them. They will not see the other recipients the email was sent to.

The Send Separate Email box is checked as a default so that the recipients see only their email address and not the others.