TempWorks Sales Basic Training

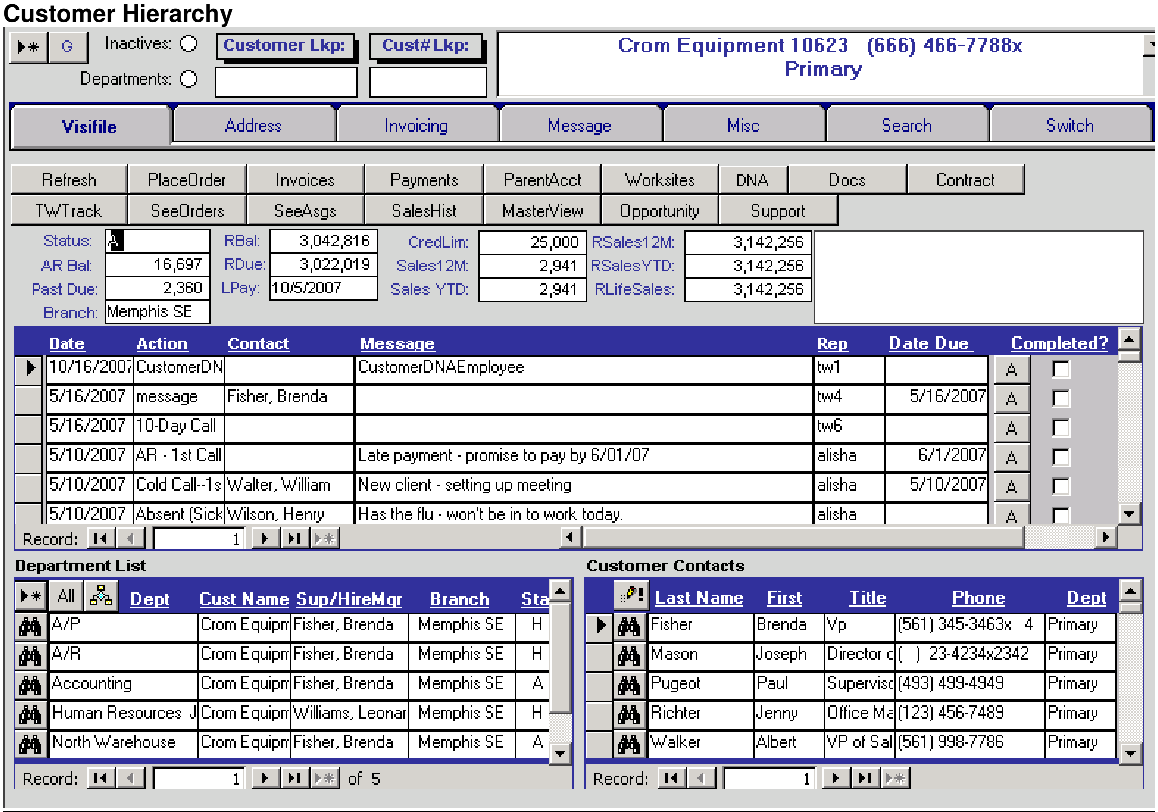
There are many features and functions of TempWorks that can be useful tools in the sales process. These tools include (but are not limited to) managing sales documents, logging sales calls, sharing your sales information with others, managing opportunities, tracking your schedule, etc. The following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

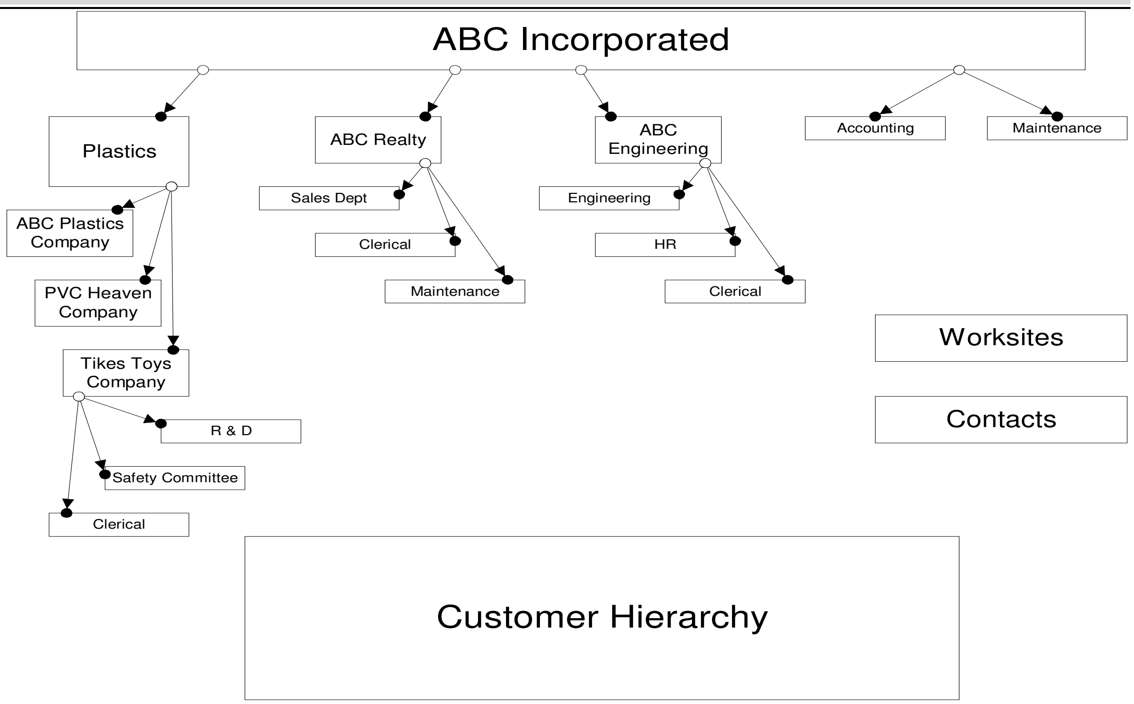
Some fields and forms may look different in your version of TempWorks since TempWorks is customizable to your company's needs.

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

Customer Tab

Customer Hierarchy





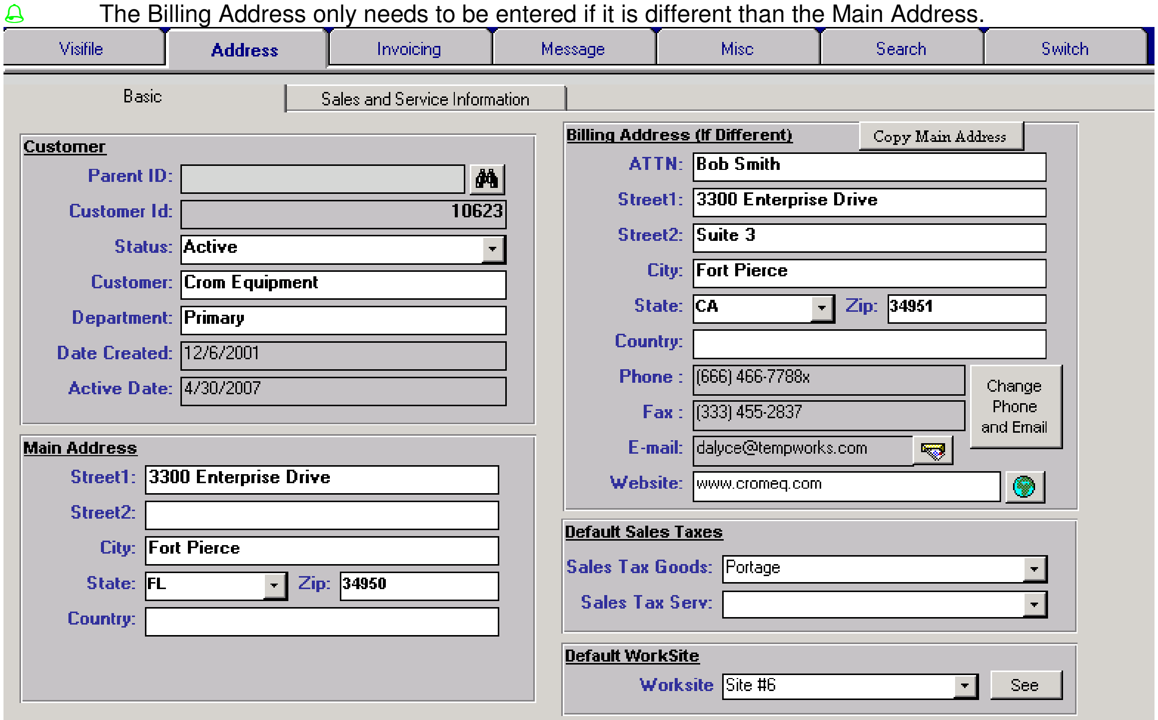
Refer to the flow chart to determine how the Customer should be set up when adding them into TempWorks. Keep in mind that anything that can be setup at the Corporate level can also be set up within each level below it (Invoicing styles, Invoicing setups, Contacts, Worksites, etc.). As Worksites and Contacts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

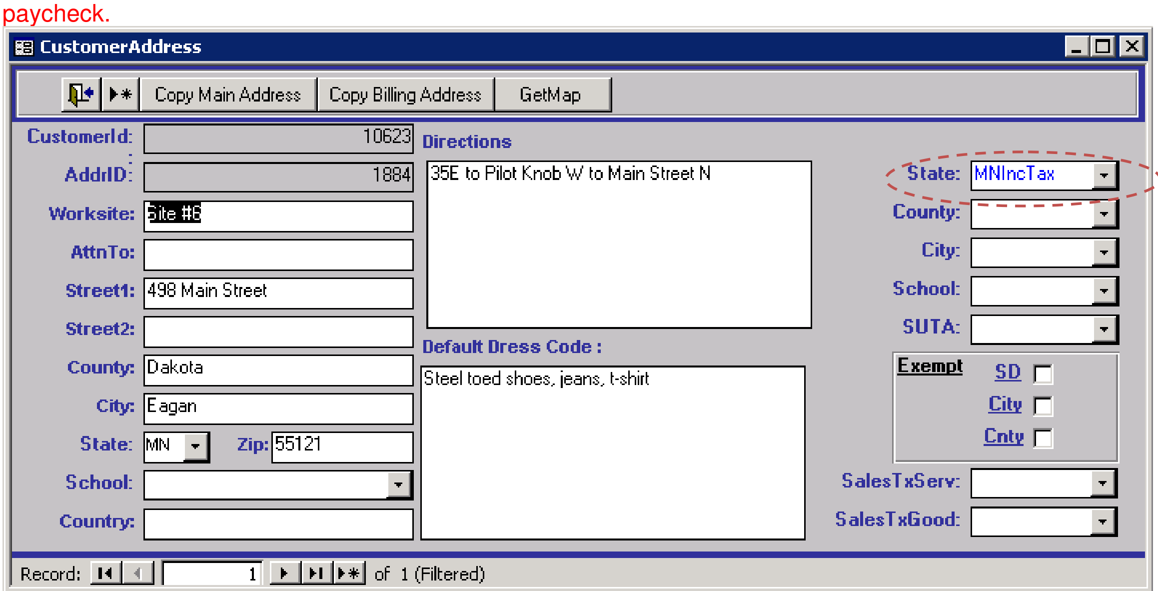
The Billing Address only needs to be entered if it is different than the Main Address.



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.

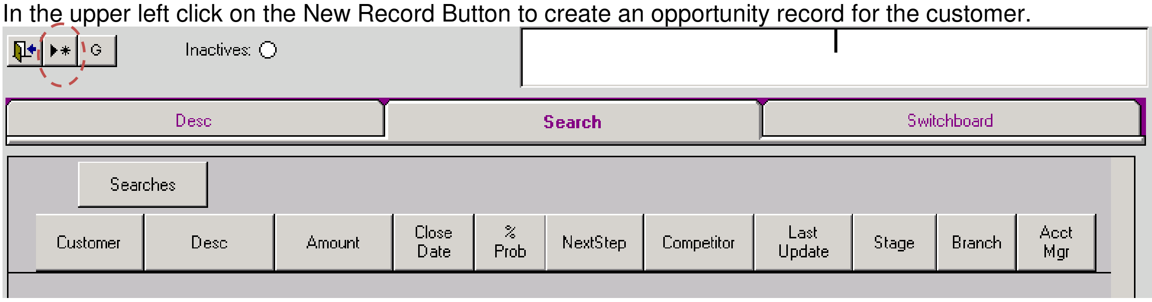


There is no limit to the number of Worksites that can be setup within a Customer record.
If you are working in a state which taxes by municipality, county, city, etc. by keying in the zip code you will be prompted to choose the proper taxing code for that particular worksite.

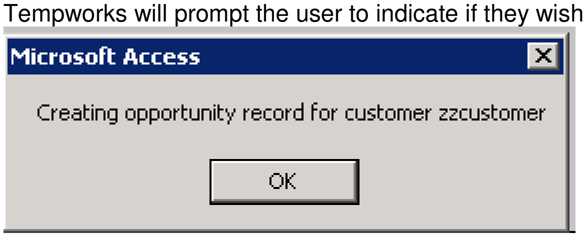
By entering the Directions and Default Dress Code into the Worksite, the information will automatically appear on any Order created using this Worksite.

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

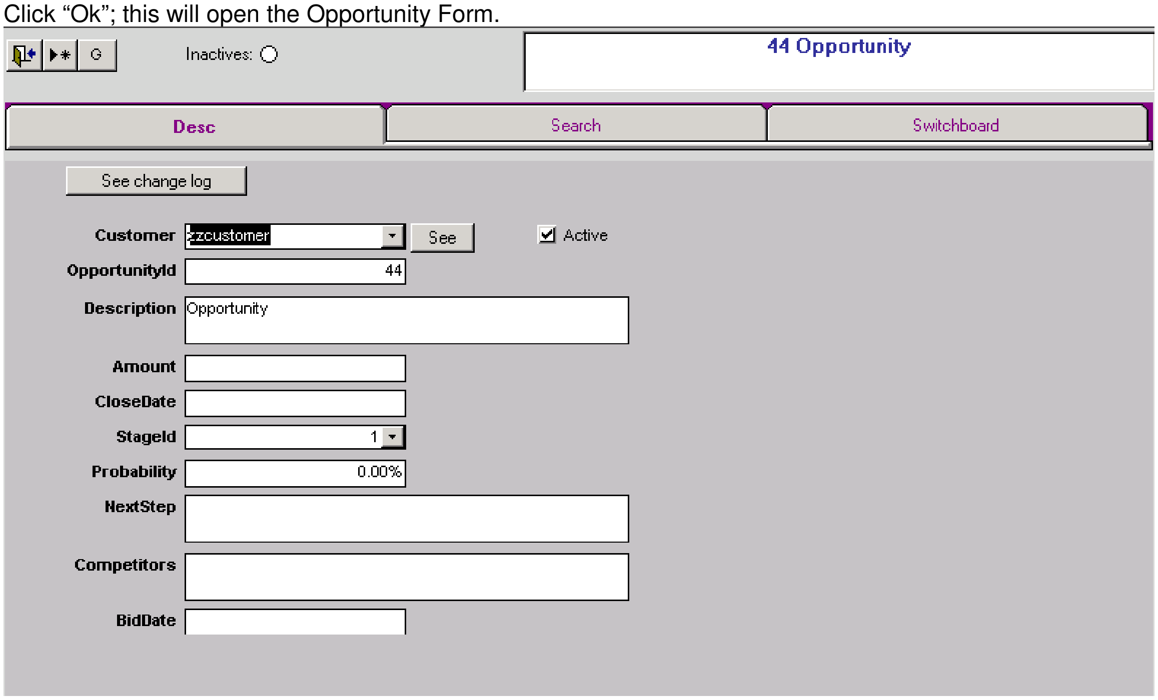
In the upper left click on the New Record Button to create an opportunity record for the customer.



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

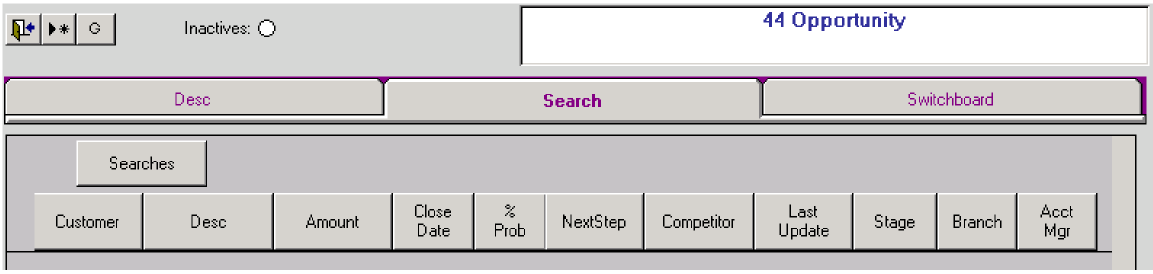


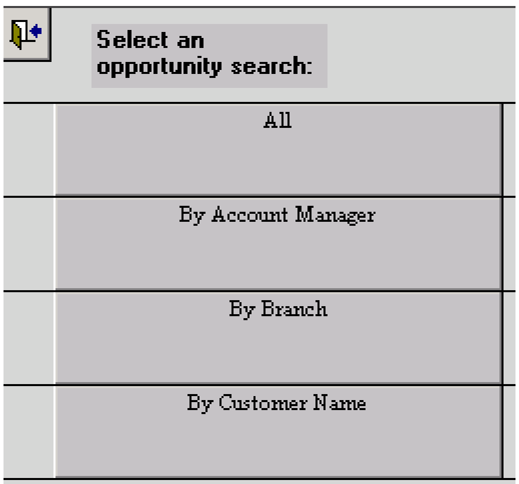
Click "Ok"; this will open the Opportunity Form.



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.





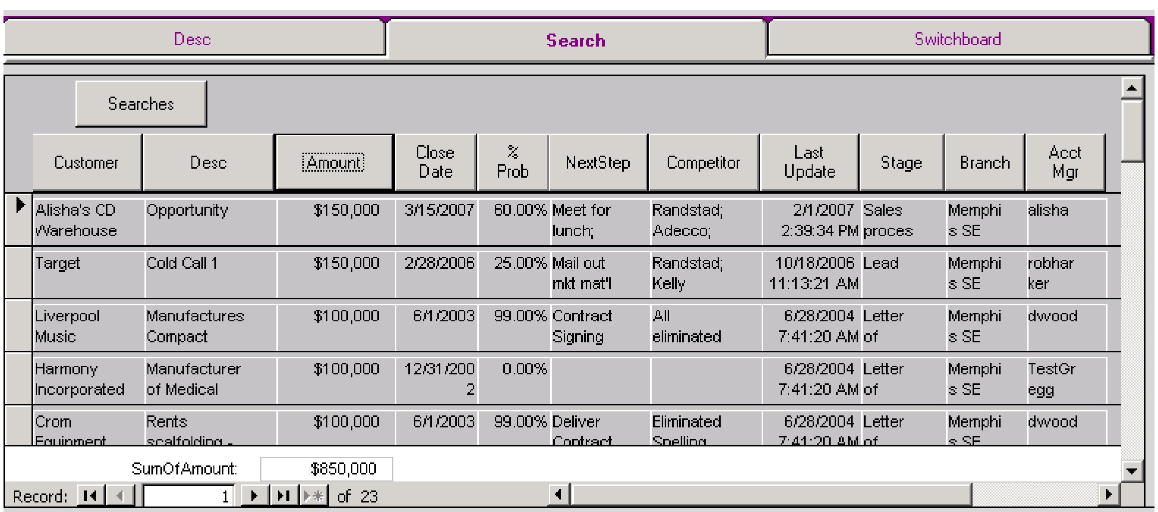
Click on the "All" button to view all customer opportunity records in Tempworks.

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.

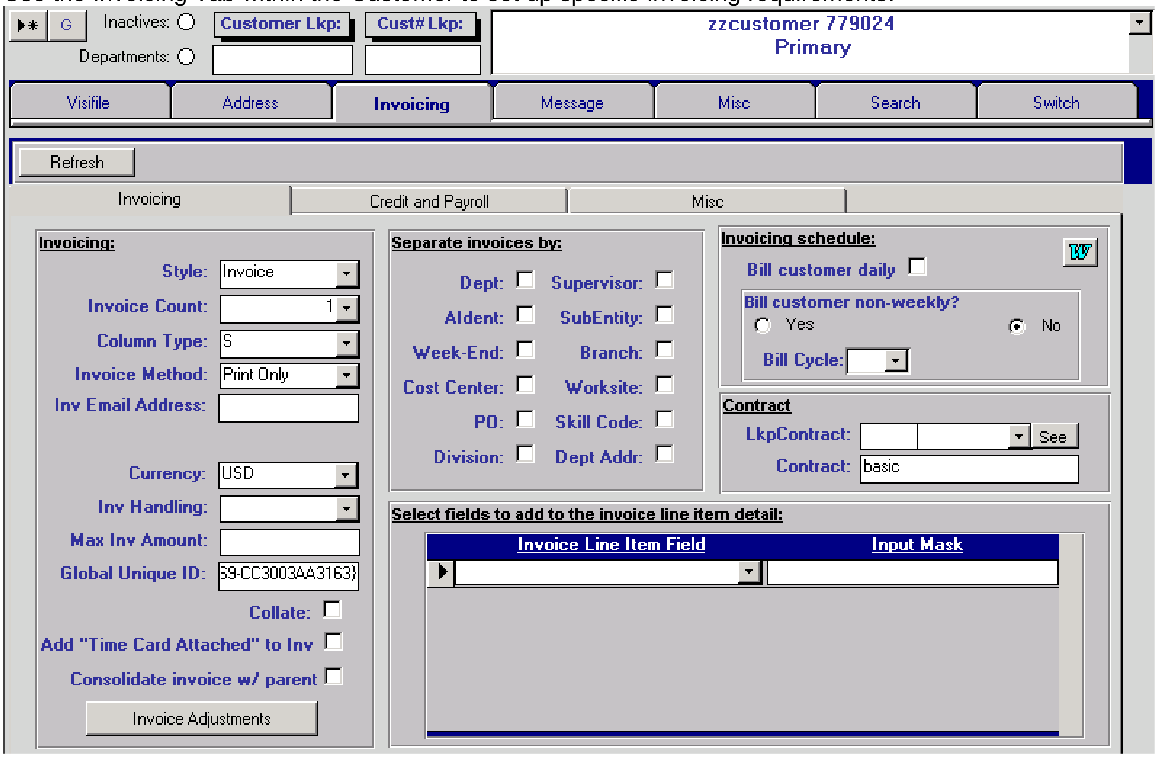


Customer	Desc	Amount	Close Date	% Prob	NextStep	Competitor	Last Update	Stage	Branch	Acct Mgr
Alisha's CD Warehouse	Opportunity	$150,000	3/15/2007	60.00%	Meet for lunch;	Randstad; Adecco;	2/1/2007 2:39:34 PM	Sales proces	Memphis SE	alisha
Target	Cold Call 1	$150,000	2/28/2006	25.00%	Mail out mkt mat'l	Randstad; Kelly	10/18/2006 11:13:21 AM	Lead	Memphis SE	robharker
Liverpool Music	Manufactures Compact	$100,000	6/1/2003	99.00%	Contract Signing	All eliminated	6/28/2004 7:41:20 AM	Letter of	Memphis SE	dwood
Harmony Incorporated	Manufacturer of Medical	$100,000	12/31/2002	0.00%			6/28/2004 7:41:20 AM	Letter of	Memphis SE	TestGregg
Crom Equipment	Rents scaffolding -	$100,000	6/1/2003	99.00%	Deliver Contract	Eliminated Spelling	6/28/2004 7:41:20 AM	Letter of	Memphis SE	dwood

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.

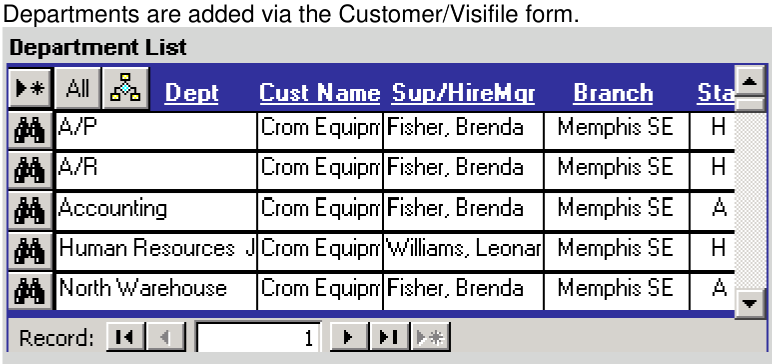
Separate Invoices By: As Customers are becoming more demanding in how they receive their Invoices, it is important to select the proper Separate Bys. Your choices include; Department, Aident (Unique Tempworks ID for employee), Weekending, Cost Center, Purchase Order number, Division (type of worker: 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

Dept	Cust Name	Sup/HireMgr	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 J	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.

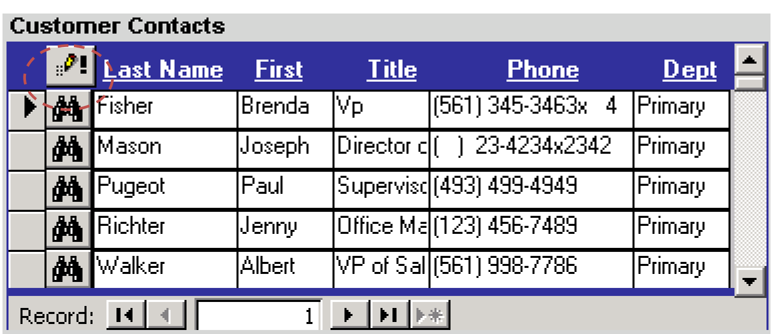
Contacts

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.

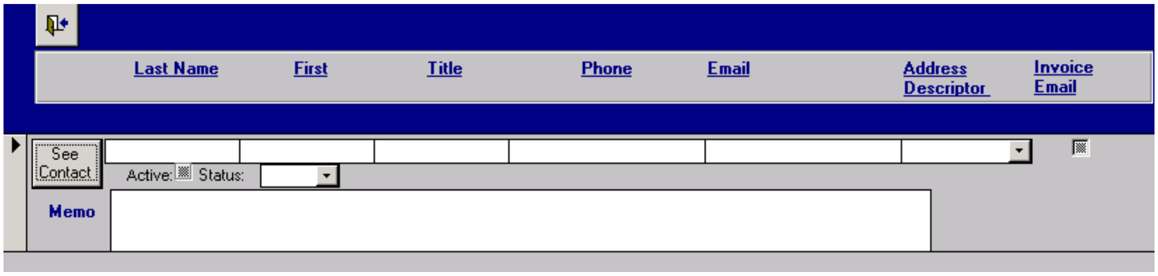


Customer Contacts

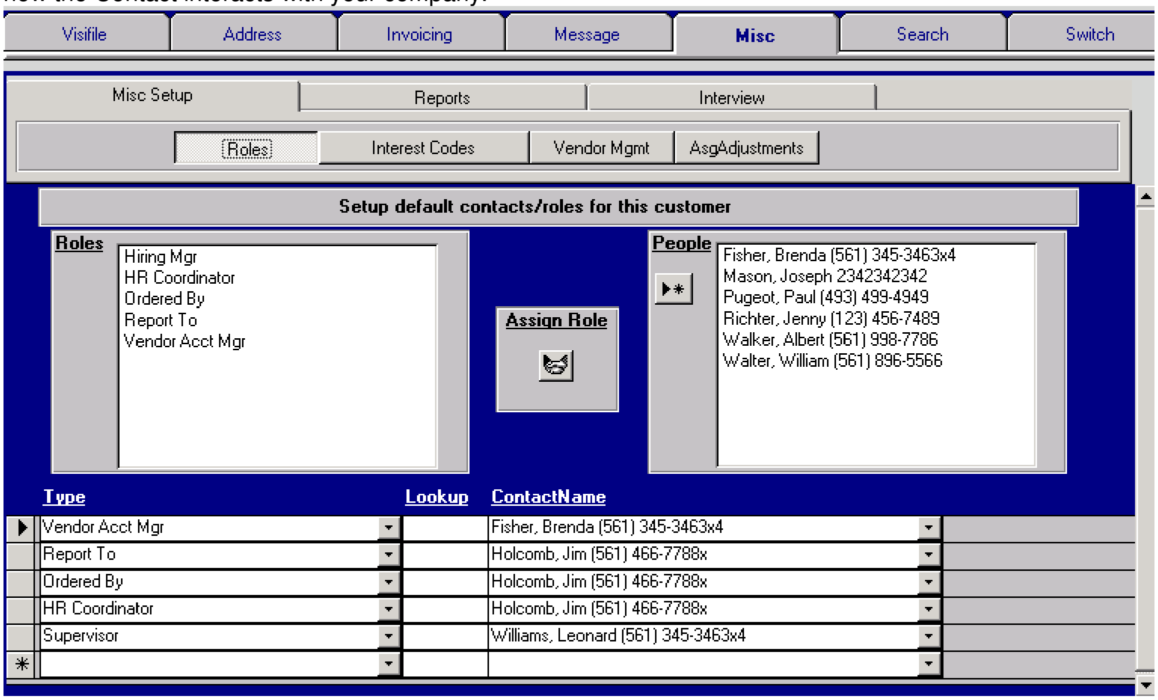
Last Name	First	Title	Phone	Dept
Fisher	Brenda	Vp	(561) 345-3463x 4	Primary
Mason	Joseph	Director c	( ) 23-4234x2342	Primary
Pugeot	Paul	Supervisc	(493) 499-4949	Primary
Richter	Jenny	Office Ma	(123) 456-7489	Primary
Walker	Albert	VP of Sal	(561) 998-7786	Primary

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 .



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.

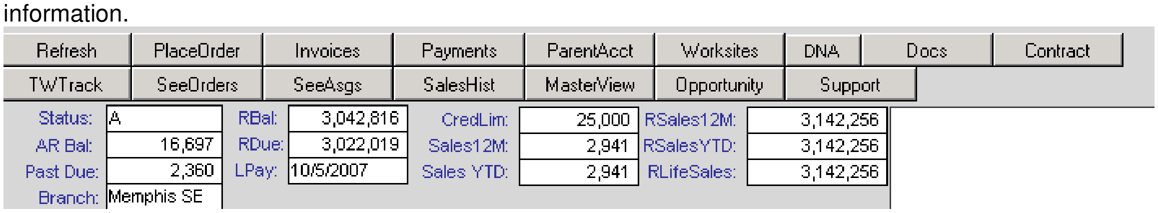


The roles can streamline the process of placing orders since the Ordered by, Supervisor and Report to Contacts will automatically populate on each Order for this Customer/Department.

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.

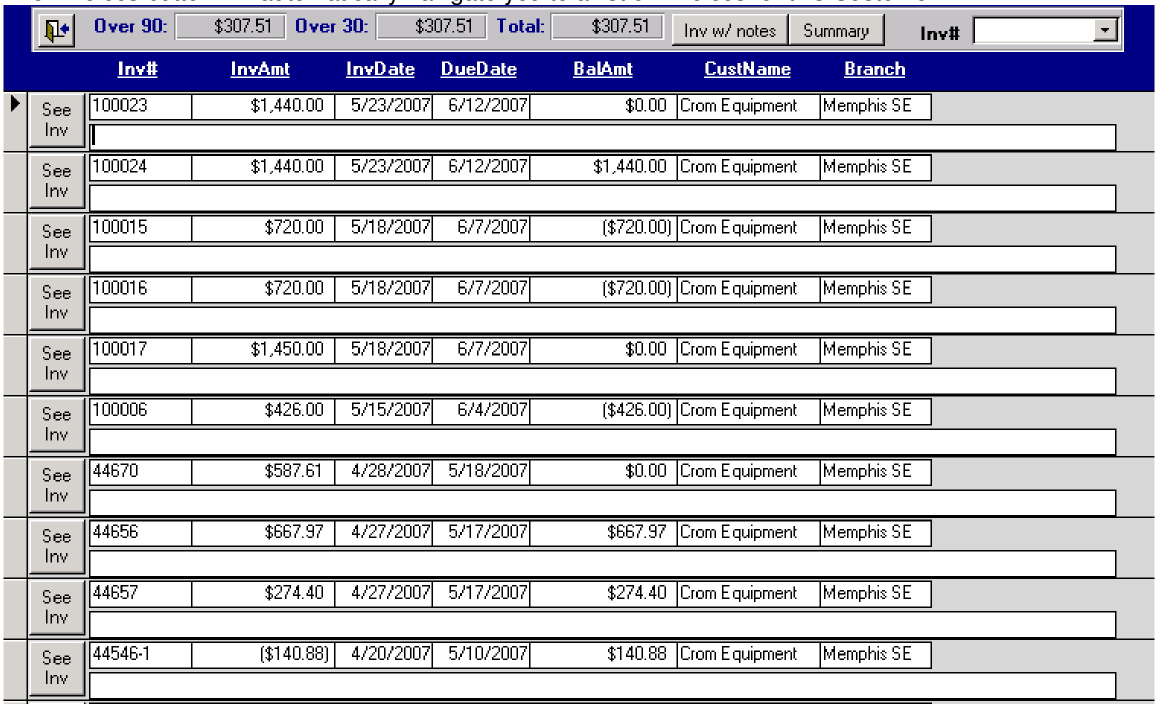
Financial Information

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.



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

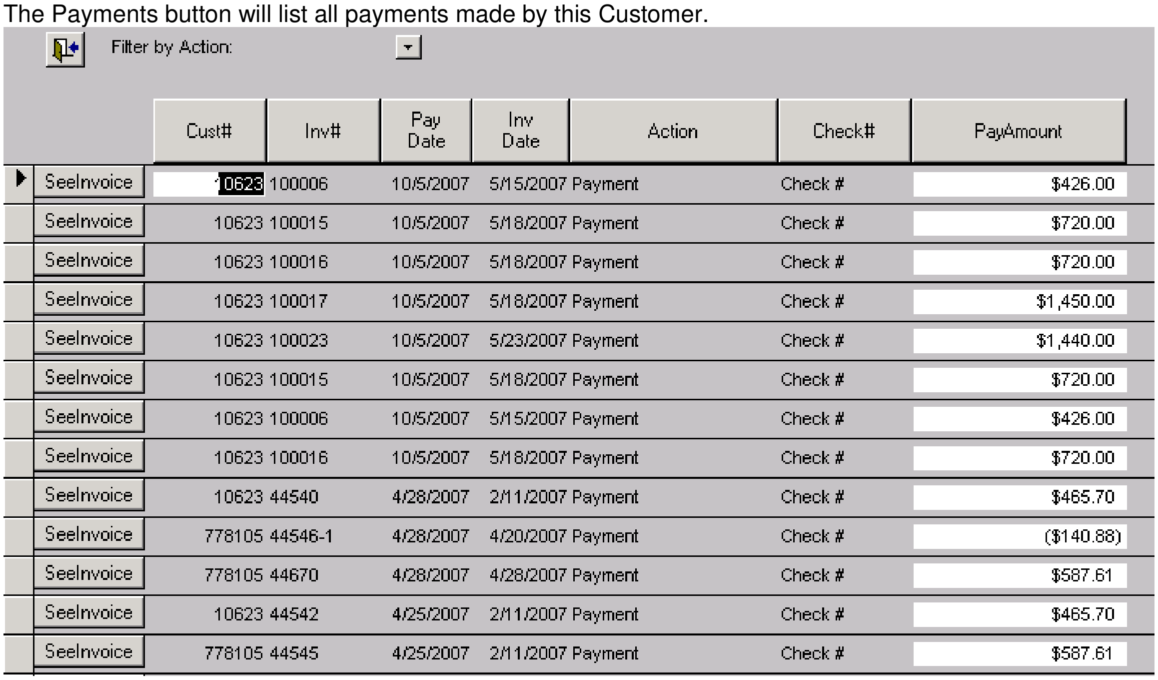
The Invoices button will automatically navigate you to a list of Invoices for this Customer.



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
SeeInvoice	10623	100006	10/5/2007	5/15/2007	Payment	Check #	$426.00
SeeInvoice	10623	100015	10/5/2007	5/18/2007	Payment	Check #	$720.00
SeeInvoice	10623	100016	10/5/2007	5/18/2007	Payment	Check #	$720.00
SeeInvoice	10623	100017	10/5/2007	5/18/2007	Payment	Check #	$1,450.00
SeeInvoice	10623	100023	10/5/2007	5/23/2007	Payment	Check #	$1,440.00
SeeInvoice	10623	100015	10/5/2007	5/18/2007	Payment	Check #	$720.00
SeeInvoice	10623	100006	10/5/2007	5/15/2007	Payment	Check #	$426.00
SeeInvoice	10623	100016	10/5/2007	5/18/2007	Payment	Check #	$720.00
SeeInvoice	10623	44540	4/28/2007	2/11/2007	Payment	Check #	$465.70
SeeInvoice	778105	44546-1	4/28/2007	4/20/2007	Payment	Check #	($140.88)
SeeInvoice	778105	44670	4/28/2007	4/28/2007	Payment	Check #	$587.61
SeeInvoice	10623	44542	4/25/2007	2/11/2007	Payment	Check #	$465.70
SeeInvoice	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

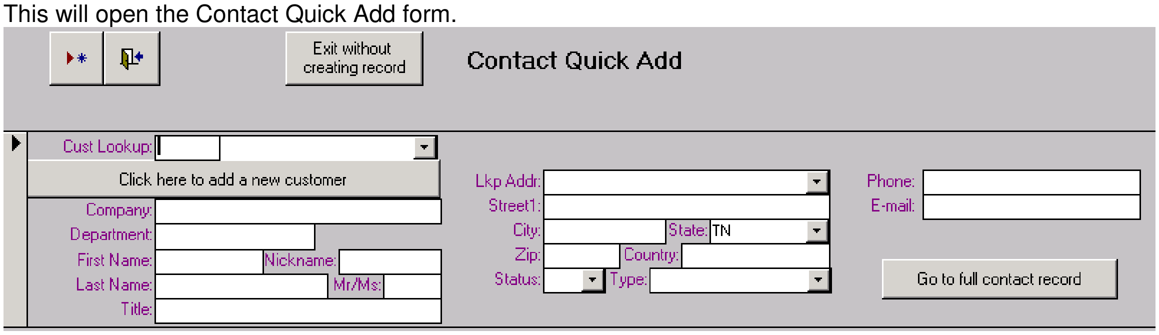
WEDate	WEBill	Last Name	Pay	AdjNet	BilAdj	Rhrs	Ohrs	Dhrs	Gross	PayCost	Bill	TBill	Skill
5/13/2007	5/13/2007	Nolan, Rumple	$50.00	$0.00	$0.00	20	0	0	$1,000.00	$1,125.80	$72.50	:1,450.00	A500
4/22/2007	4/22/2007	Hinkl, Matthew L	$20.00	$0.00	$0.00	8	0	0	$160.00	$178.93	$35.00	$274.40	A048
4/22/2007	4/22/2007	Bailey, Brian Johr	$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	($520.00)	($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	3,000.00	$12.00	$0.00	40	0	0	20,000.00	71,487.98	5,850.00	i6,886.12	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.



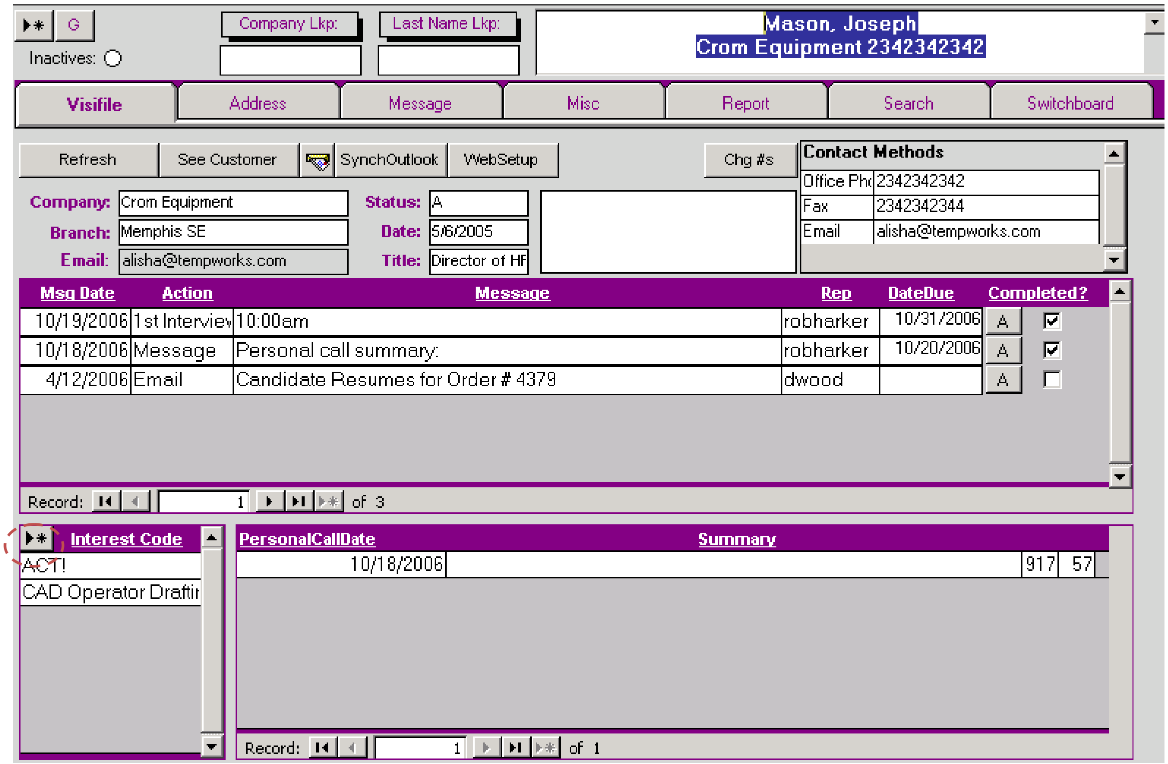
Enter all necessary information. If the Contact is affiliated with a current Customer, use the Cust Lookup to attach this Contact to the Customer record. A Contact does not require a Customer affiliation.

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.

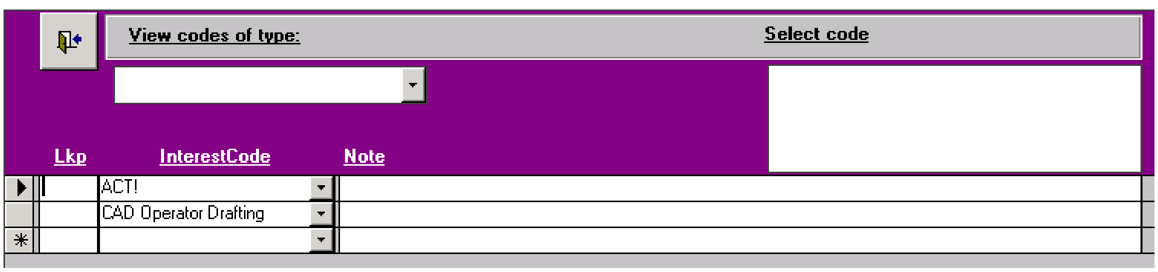
Contact Interest Codes

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.



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

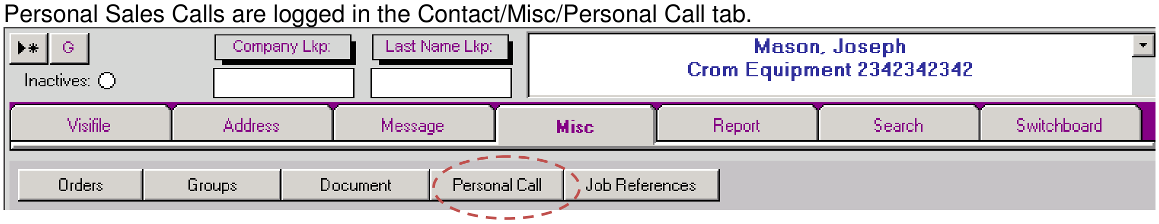


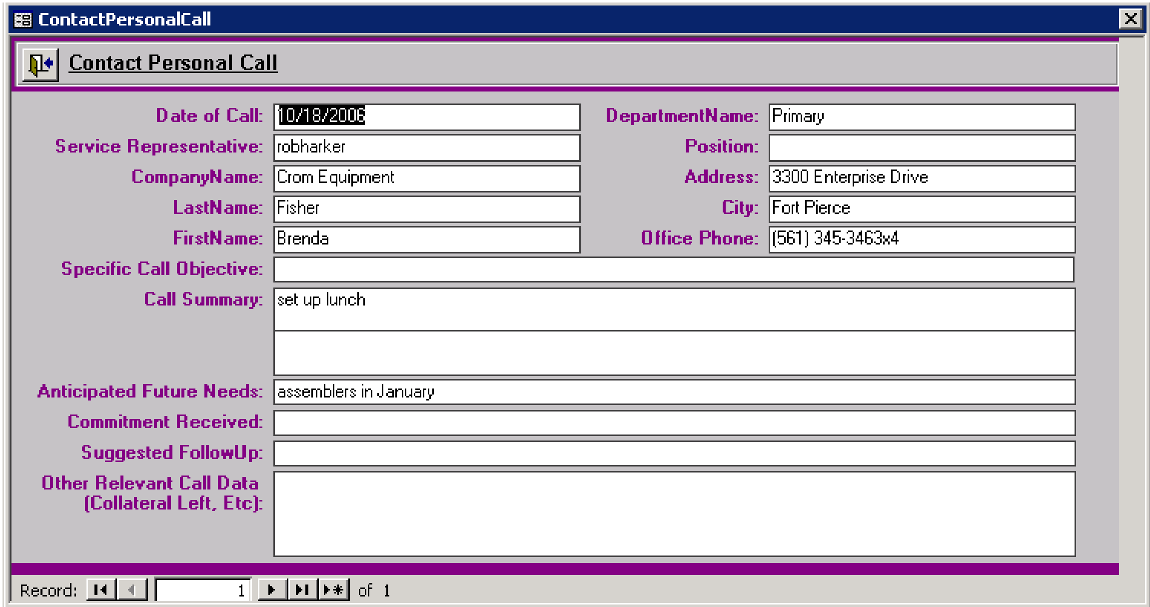
Add Interest Codes by using the Look up field or by viewing codes by type and then clicking on a code in the box to the right to select it and add it to the list.

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.





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.

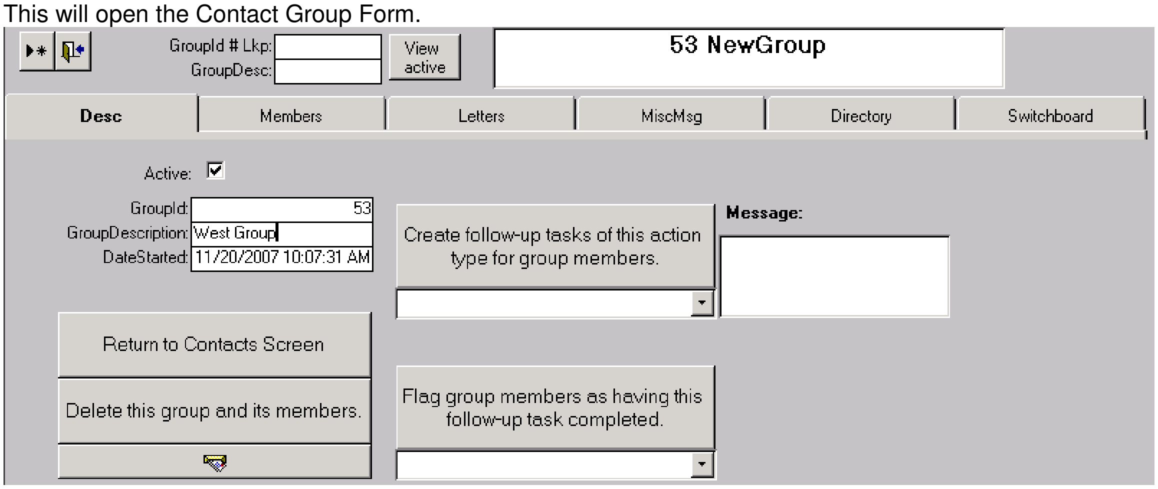
Contact Groups

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.

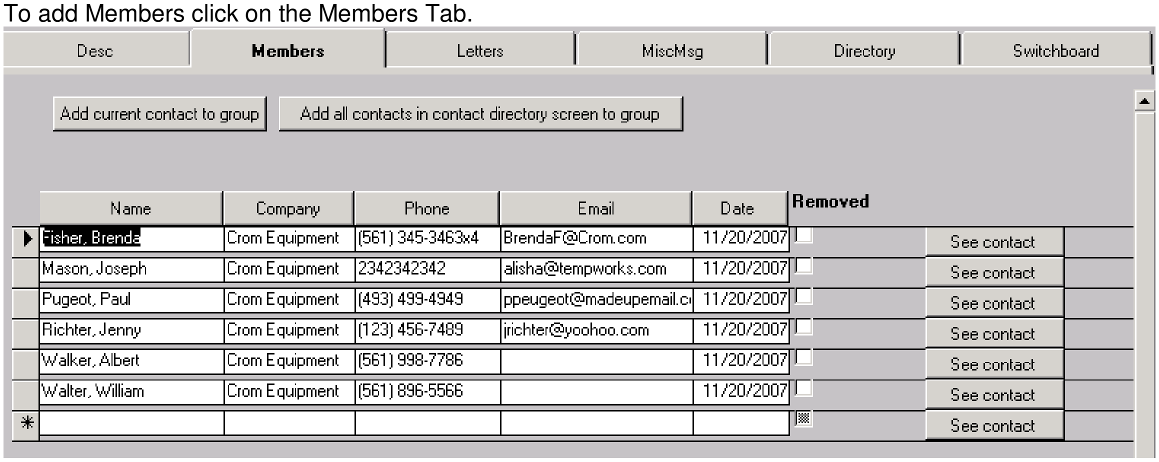
Name	Company	Dept	Title	S	LastMsg	#Msgs	Other	OfficePhone	Branch	Cust#
Fisher, Brenda	Crom Equipment	Primary	Vp	A	5/16/2007	48	Fort Pierce 34950	(561) 345-3463x4	Memphis SE	10623
Mason, Joseph	Crom Equipment	Primary	Director o	A	10/19/200	3	Denver 32424	(234) 234-2342	Memphis SE	10623
Pugeot, Paul	Crom 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
Walter, William	Crom Equipment	Primary	Mail Roor	A	5/10/2007	1	Fort Pierce 34950	(561) 896-5566	Memphis SE	10623

This will open the Contact Group Form.



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.



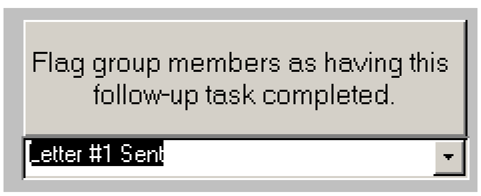
To add the Contacts within your Search Results form, click on the button labeled Add all contacts in contact directory screen to group.

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.

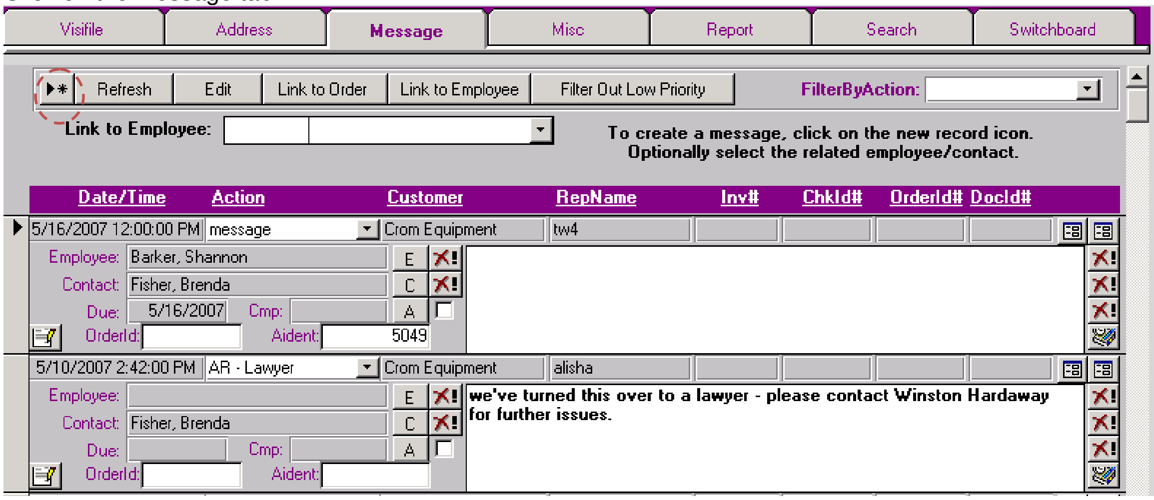
The steps in logging Messages are as follows:

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.

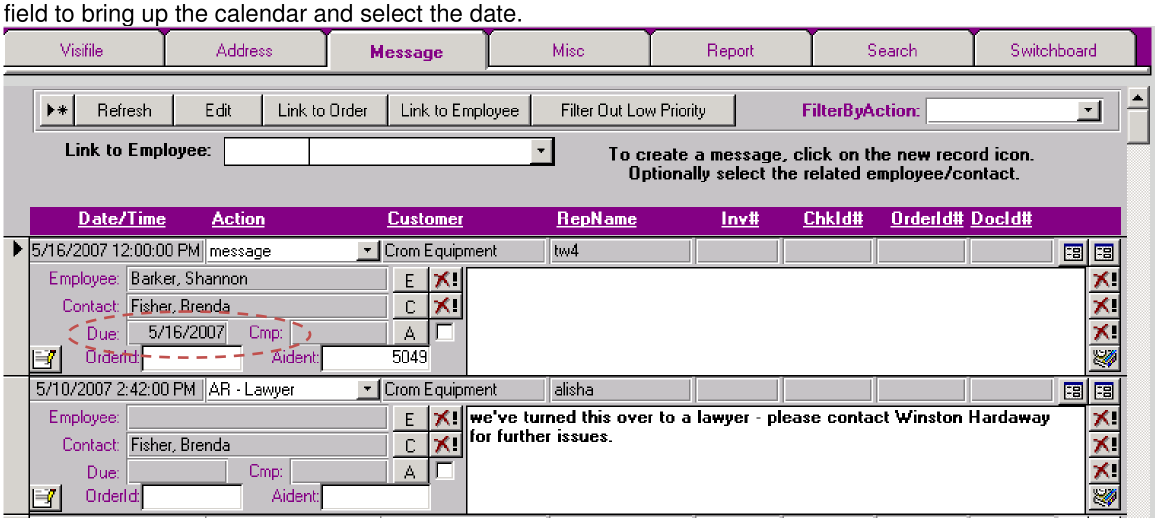
Activity Planner

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.

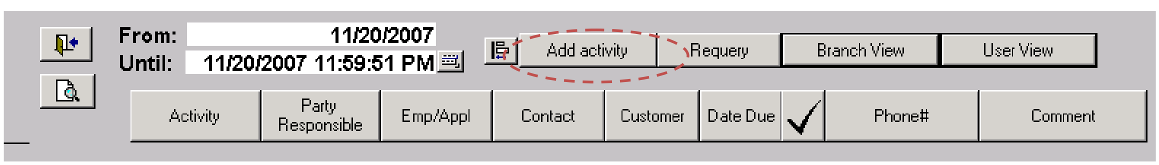
Another way to add an Activity is to access the Activity Add Anything form.

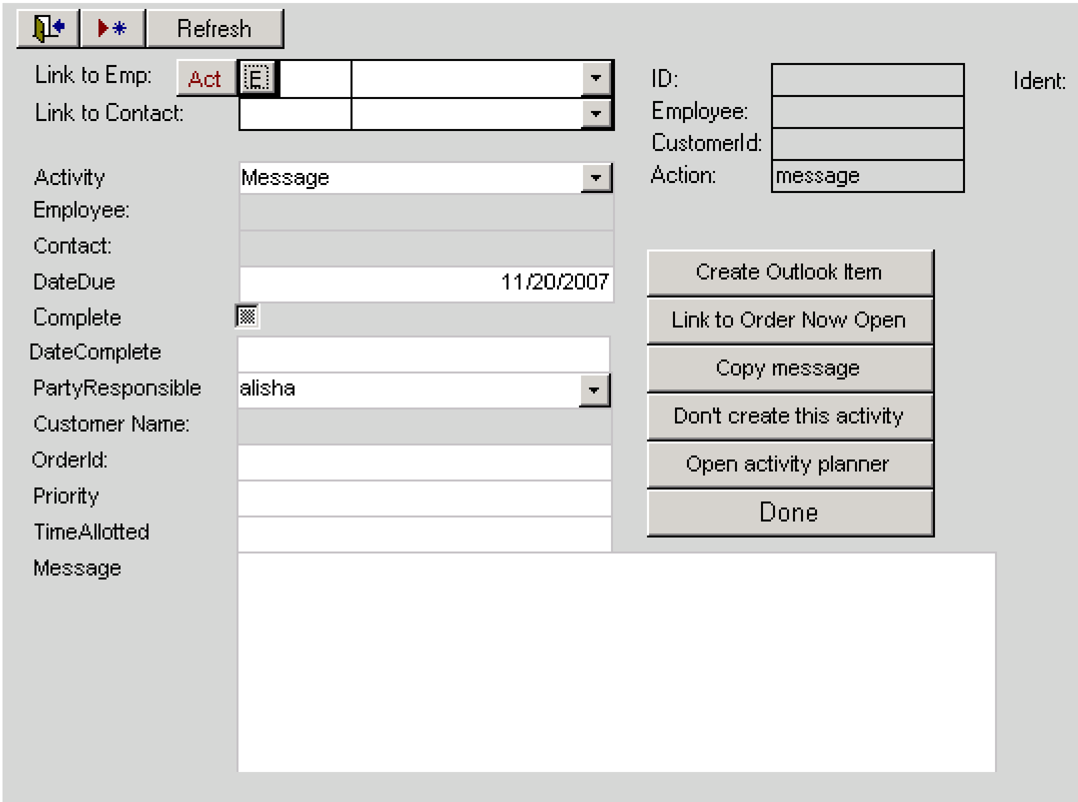
- Use this method to add an Activity which will not be linked to anything else within TempWorks- **Stand Alone Activities**

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.

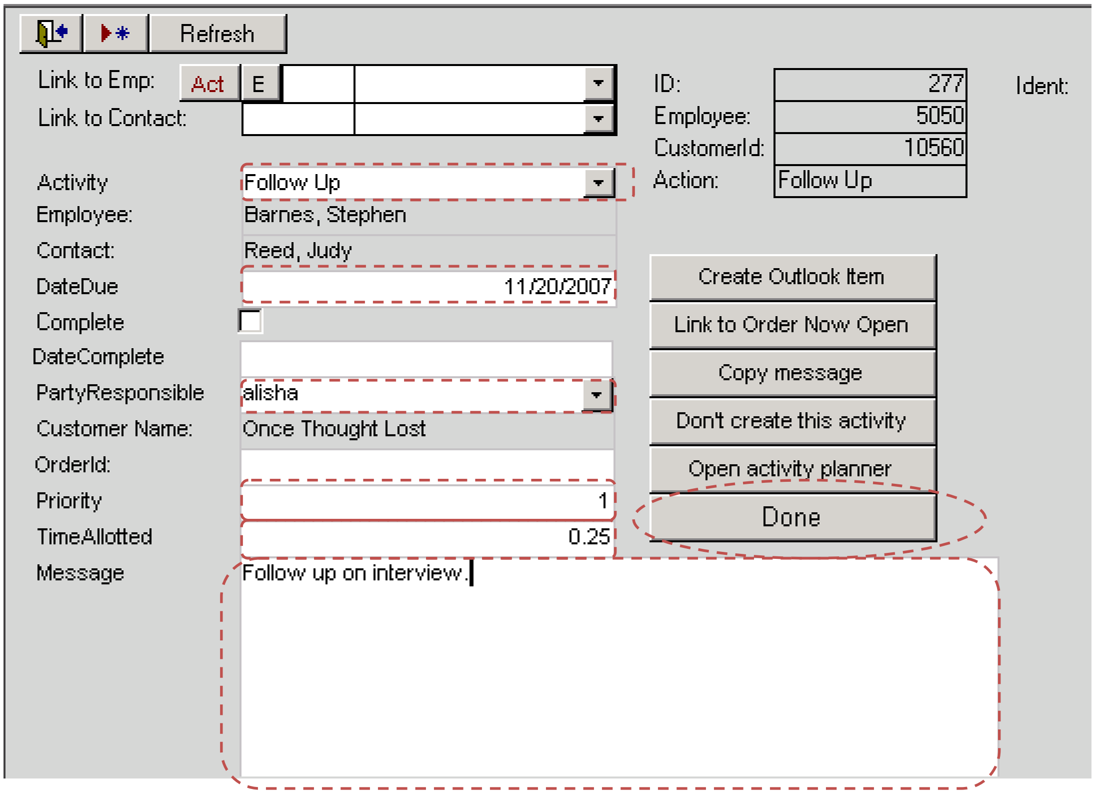




To link the activity to an Employee or Contact, look up the name on the left columns (first few letters of the Employee's last name) and choose the name from the drop down list.

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 Alloted**.

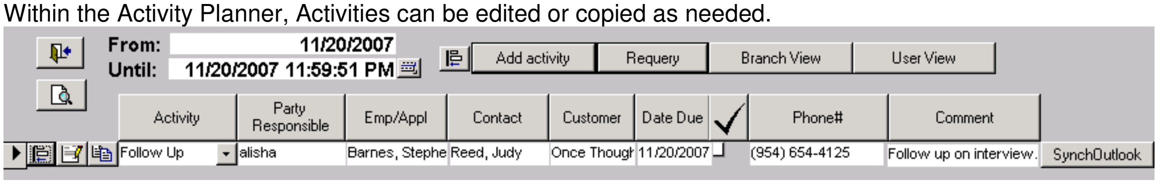
Finally, enter the Activity **Message**.

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	✓	Phone#	Comment
Follow Up	alisha	Barnes, Stephe	Reed, Judy	Once Thougt	11/20/2007	☐	(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

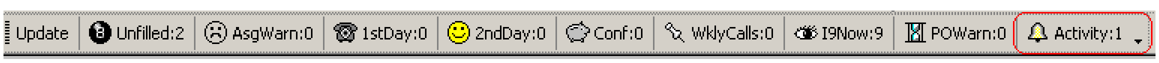
Once an Activity has been completed, indicate that on the Activity by clicking so a check mark shows in the Check Box.

Activity	Party Responsible	Emp/Appl	Contact	Customer	Date Due	✓	Phone#	Comment
Follow Up	alisha	Barnes, Stephe	Reed, Judy	Once Thougt	11/20/2007	☐	(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.

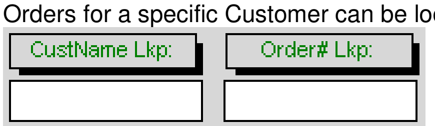


Orders Tab

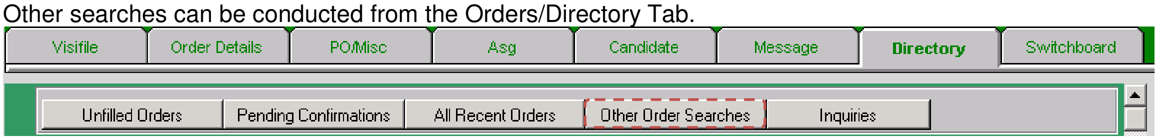
Accessing Orders

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

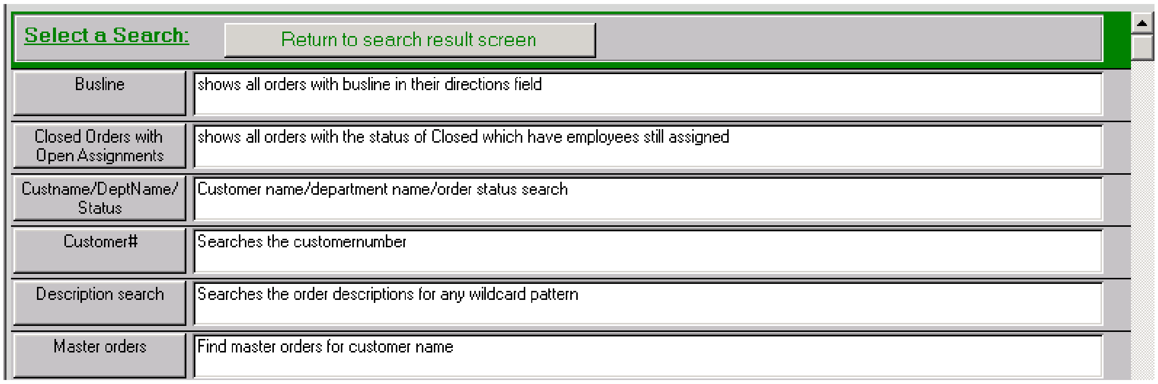
Orders for a specific Customer can be looked up by the Customer Name in the CustName Lkp field.



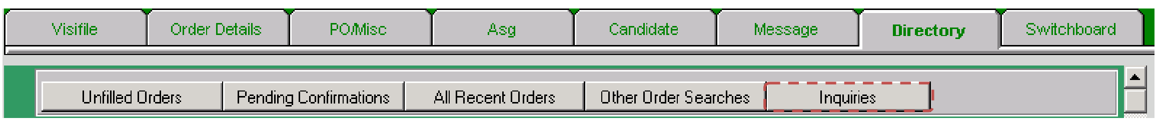
Other searches can be conducted from the Orders/Directory Tab.



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



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.

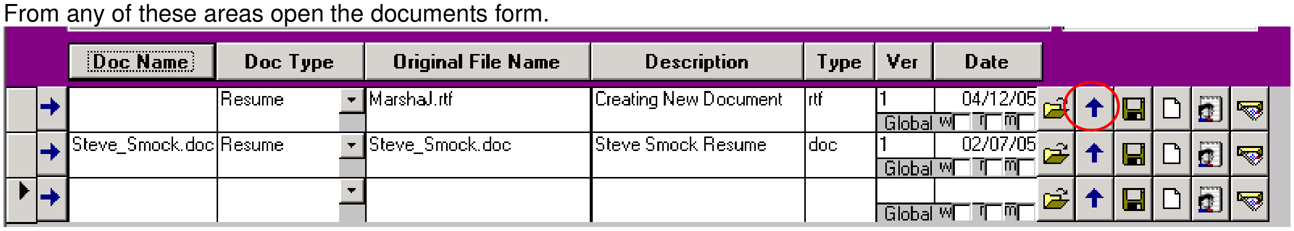
There are four areas in which to store documents (where a document is stored is dependant upon the type of document): Associate, Customer, Contact and the General Documents tab. Once the document is housed within any of these areas, steps in working with the documents are the same.

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

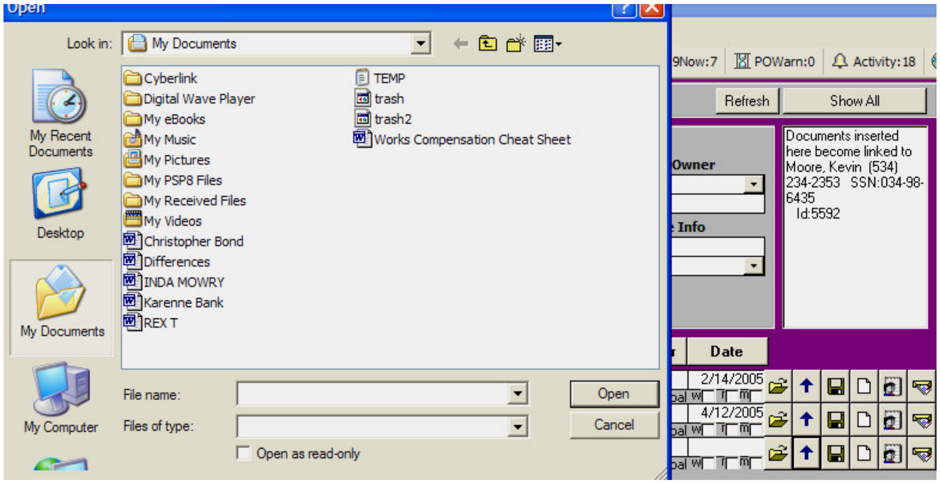
From any of these areas open the documents form.



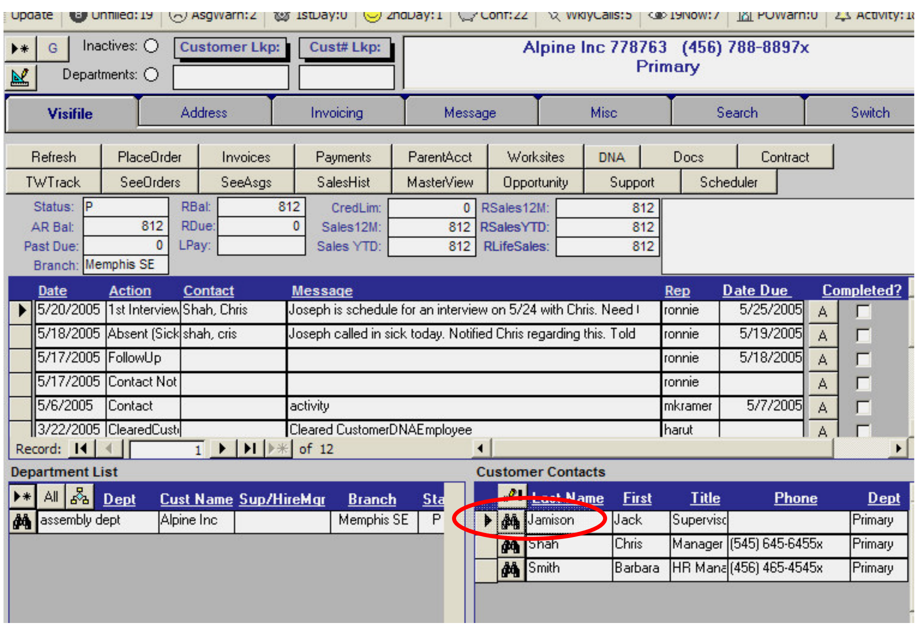
Manage the documents by (1) opening the file to preview, **(2) uploading the file to the server,** (3) saving the file to a disk, (4) creating a new file, (5) View Document Owner(s) and (6) attach this file to e-mail.

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.

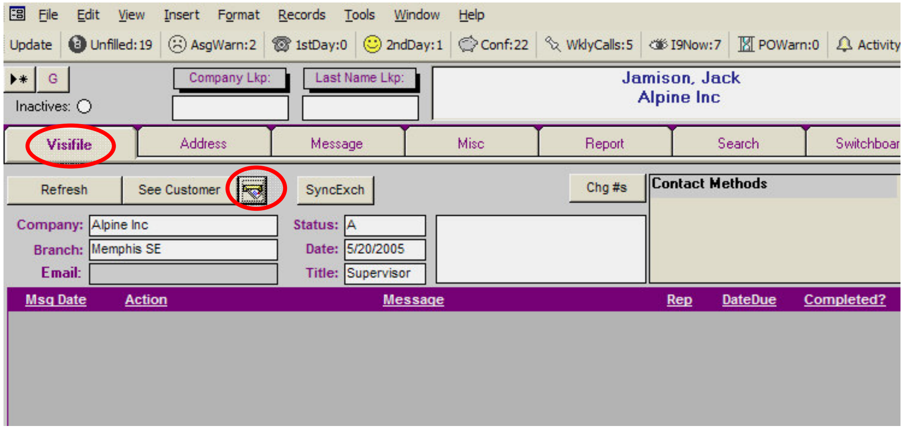
The Upload Files Up Arrow button will open the documents on the hard drive. Choose one for attaching to the employee record.



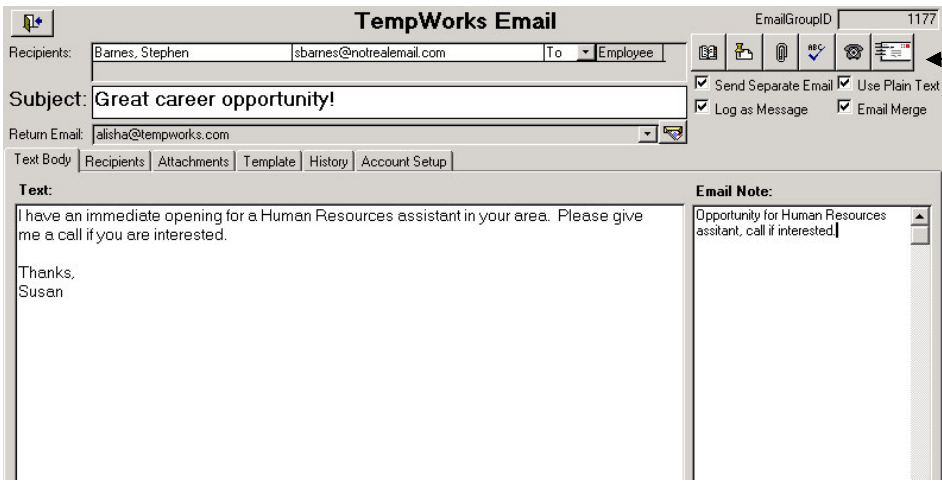
To send an email from the Contact tab, first look up the contact you want to send the email to. If you know the customer but forgot the name of the contact, look up the customer first and click on the Binoculars button to get to the contact record the email should go to.



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



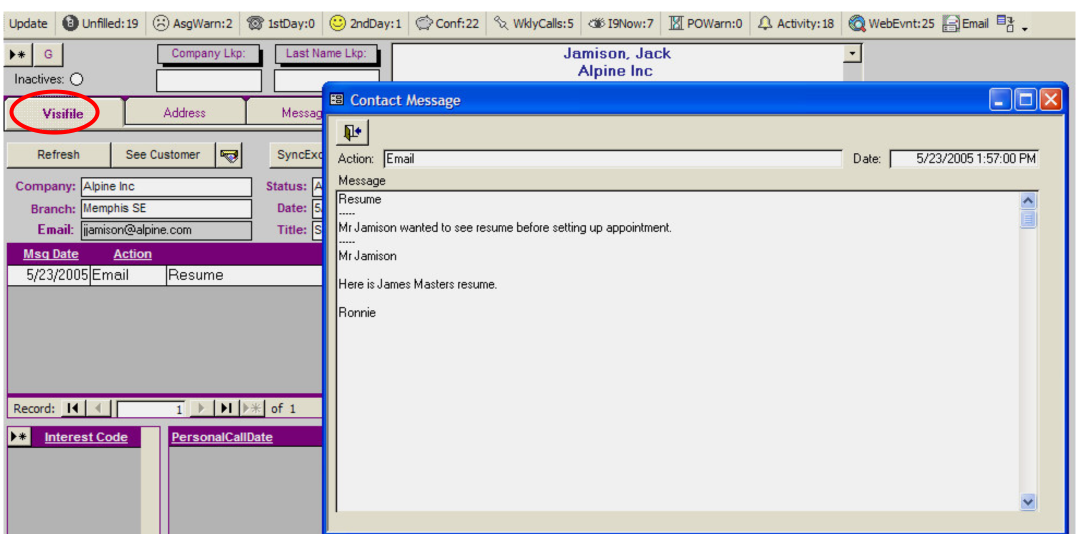
The Tempworks email will open.



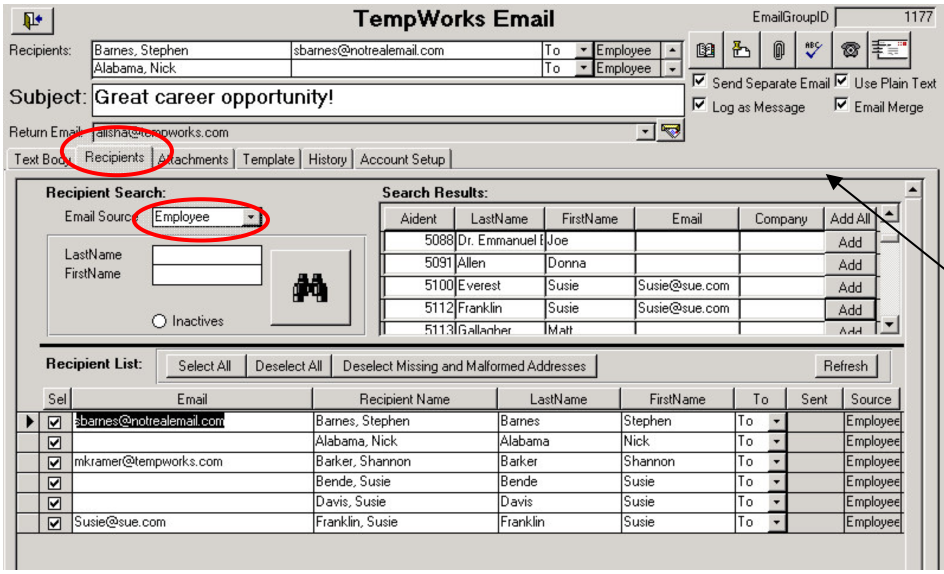
Click here to send email.

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 stars with those letters. We can then choose the recipient we want to send an email to.



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.