

## 14R2 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 *New Order* 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 *Actions* 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 “TE” (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.

**Solar Impact Inc.**  
Shipping And Receiving Clerk

visifile  
details  
po setup  
interest codes  
required documents  
vendors  
invoice recipients  
candidates  
job posting  
messages  
documents  
search

tasks  
Unfilled Order  
Unfilled Order  
Send Resume to Supervi...  
Send Resume to Supervi...  
Send Resume to Supervi...  
Send Resume to Supervi...  
Send Resume to Supervi...

**Order Details** Web Options

**customer information**

Customer: Solar Impact Inc. Work Site: Warehouse Site 1  
859 Egyptian Ave  
Saint Paul, MN 55  
Department: Warehouse  
Customer ID: 779838 Worker Comp: 3017  
Directions: North on Hwy 35E

**financial details**

Pay Rate: \$10.00 Multiplier: 1.5325 AI  
Bill Rate: \$15.33 Pay Periods: 52  
Overtime Bill: \$22.99 GP Percent:  
Doubletime Bill: \$30.00 GP Estimate:  
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: Leather work gloves and steel-toed safety shoes  
Safety Notes:  
Start Date:  
Duration: 2 months  
Est. End Date:  
Shift: Morning  
Start Time: 08:00 End Time: 16:00  
Shift Notes:  
 Sun  Mon  Tues  Wed  Thu  Fri  Sat

**contacts**

Name	Description	Office Phone
Flynn, Vince	Supervisor	6847274757

**other information**

Status: Master  
Taken By: alisha  
Sales Team: Default  
Branch: Memphis NE  
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".

**Solar Impact Inc.**  
Shipping And Receiving Clerk

visifile  
details  
candidates  
search  
log  
job posting  
messages  
documents

**Candidates**

Drag a column header here to group by that column.

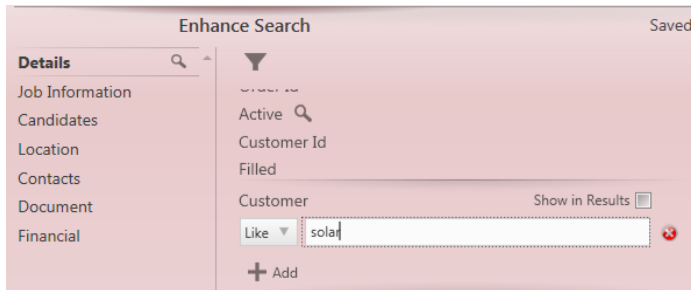
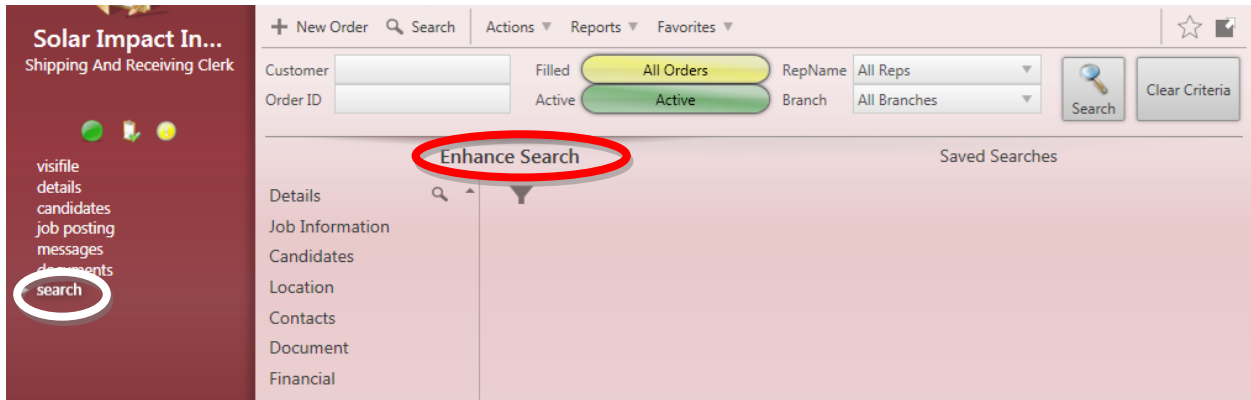
First Name	Last Name	Phone Number	Status	Branch Name	Status Date	Comments	Call
Patty	Borstle	(651) 206-1965	Candidate	Memphis NE	3/26/2010		
Barry	Bristol	(651) 287-8370	Candidate	Memphis NE	3/26/2010		
Charles	Cameron	(651) 555-1212...	Candidate	Memphis NE	3/26/2010		
zzflashtest	Coaster	(654) 545-4555	Candidate	Memphis SE	3/26/2010		
Margaret	Hannibal	(651) 555-1212...	Candidate	Memphis NE	3/26/2010		

**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:

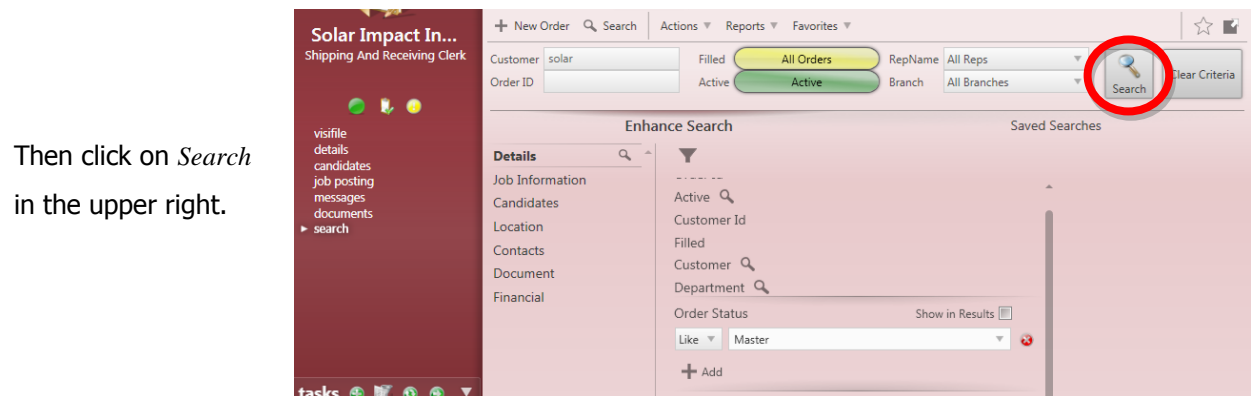


In the *Details* form enter the *Customer* name...

The *Department* (if any)...

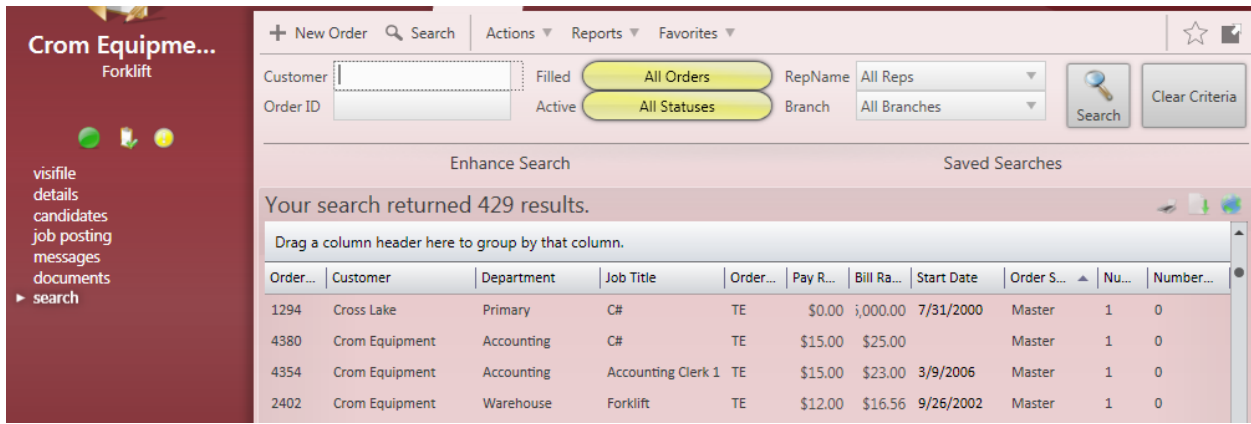


and choose "Master" from the *Order Status* drop down menu.



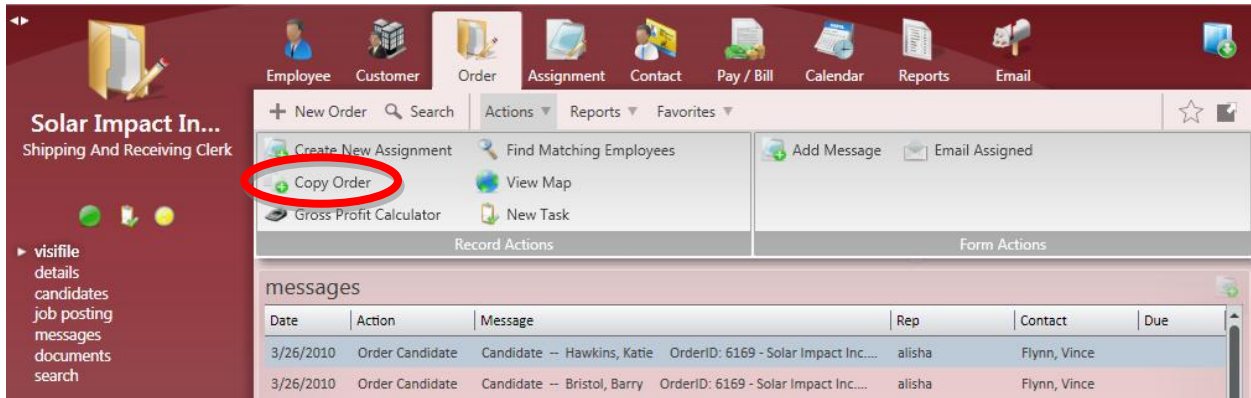
Then click on *Search* in the upper right.

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

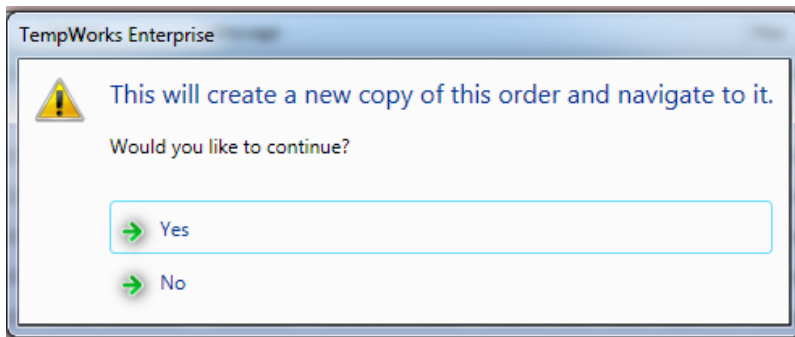


From the **Search** results list double-click on the line for the **Order** record that you need to copy. The **Order** will open to the **Visifile**. To verify that you have selected the correct **Order**, open the **Order Details** screen.

Copying a Master Order



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



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*.

**Solar Impact In...**  
Shipping And Receiving Clerk

pro setup  
interest codes  
required documents  
vendors  
invoice recipients  
candidates  
job posting  
messages  
documents  
search

**tasks**

- Unfilled Order
- Unfilled Order
- Unfilled Order
- Unfilled Order
- Unfilled Order
- Unfilled Order
- Unfilled Order

**Order Details** | Web Options

customer information

Customer	Solar Impact Inc.	Work Site	Warehouse Site 1 859 Egyptian Ave Saint Paul, MN 55
Department	Warehouse		
Customer ID	779838	Worker Comp	3017
Directions	North on Hwy 35E		

financial details

Pay Rate	\$10.00	Multiplier	1.5325 AI
Bill Rate	\$15.33	Pay Periods	52
Overtime Bill	\$22.99	GP Percent	21.6965733
Doubletime Bill	\$30.00	GP Estimate	\$532.00
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: Leather work gloves and steel-toed safety shoes

Safety Notes:

Start Date:

Duration: 2 months

Est. End Date:

Shift:

Start Time: 08:00 | End Time: 16:00

Shift Notes:

Sun  Mon  Tues  Wed  Thu  Fri  Sat

contacts

Name	Description	Office Phone
Flynn, Vince	Supervisor	6847274757

other information

Status: Unfilled

Taken By: alisha

Sales Team: Default

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](mailto: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 training department at [trainers@tempworks.com](mailto:trainers@tempworks.com).

