
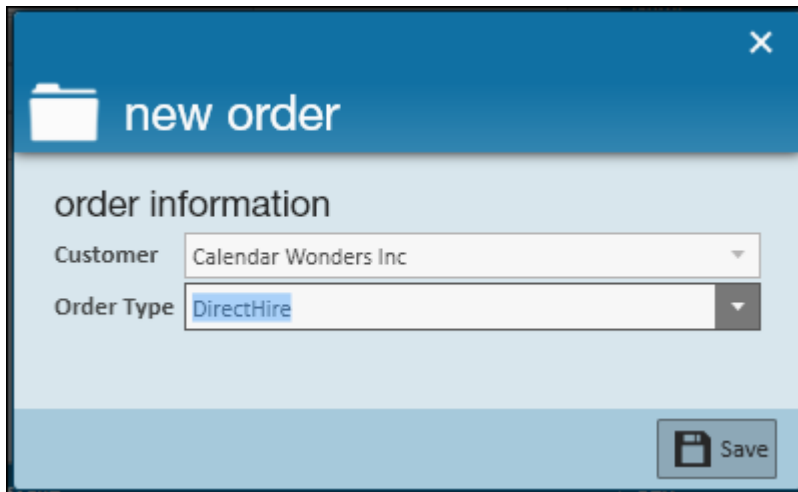



## 15R1 Enterprise Direct Hire

To open the window to add a new **Order** record to Enterprise you can go to the *E* menu 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  button 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). To create a direct placement **Order** change the *Order Type* to "DirectHire". Once the *Order Type* has been updated click *Save*. This will add the **Order** to the database and open the record to the **Details** form.

**Calendar Wonders Inc, Primary**  
Unknown  
0 of 1 positions filled  
Customer ID: 779608  
Order ID: 6149

There are no tasks to display. You can adjust your filter settings to customize this view.

tasks calendar email 2 alerts 9

visifile **Order Details** Web Options Direct Hire Details

**Customer Information**

Customer: Calendar Wonders Inc Work Site: Corporate Office  
5422 New St.  
Eagan, MN 55121

Department: Primary Worker Comp: Tx8820

Customer ID: 779608 Directions: North on Hwy 210

**Job Information**

Required: 1 Assigned: 0

Order Type: DH DirectHire

Job Title: Admin.support/receptionist

Description:

Dress Code: Business casual

Safety Notes:

Start Date: 9/27/2010

Shift:

Start Time: End Time:

Shift Notes:

**Financial Details**

Fee Percentage: 25

Salary: \$30,000.00

Fee: \$7,500.00

**Contacts**

Name	Description	Office Phone
Lowry, Ben	Hiring Mgr	(612) 626-4436

**Other Information**

Status: Unfilled

Taken By: alisha

Sales Team: Default

Branch: Memphis NE

Do Not Auto-Close:

Notes:

Select the *Work Site*, number *Required*, *Job Title*, *Start Date*, *Shift* or *Start and End Times*, *Fee Percentage*, *Salary*, and *Contact* (ie. Hiring Manager, Supervisor, etc.). Then click on the **Direct Hire Details** tab at the top to enter more information.

visifile **Direct Hire Details** Web Options Order Details

**Position Summary**

Primary Responsibility:

Salary Range:

People Seen:

Reason for Open Position:

Why would someone want this opportunity versus a competitor:

Hiring Manager and Process:

**Candidate Preferences**

Required Skills / Experience:

Additional Skills:

Ideal Candidate:

Top 3 Knock-out Factors:

Three most important attributes for success in this role:

Fill out any additional information or details about the **Order** in this form. Once the **Order Details** form is completed you can start your search for candidates (covered in the Front Office Training Manual).

When an **Assignment** is created for a "DirectHire" **Order** the **Assignment Details** screen will look like the one below:

The screenshot shows the 'Assignment Details' screen for Catalano, Susie. The top header includes the employee name, company (Calendar Wonders Inc), assignment ID (10145), and employee ID (5063). A navigation bar at the top right shows 'tasks', 'calendar', 'email', '2 alerts', and '9'. The main content area is divided into several sections: 'assignment information' (Employee, Aident, Customer, Department, Order ID, Assignment ID, Temp Phone, Status), 'direct hire fees' (Fee Percentage, Salary, Fee), 'job information' (Job Title, Business Code, Start Date, Expected End Date, Actual Date Ended), and 'other information' (Sales Team, Service Rep, Branch, Perf Note). A left sidebar contains navigation options like 'details', 'messages', 'custom data', 'calls', 'search', 'employee', 'customer', 'order', 'assignment', 'contact', 'pay / bill', 'calendar', 'reports', 'email', and 'all options'.

The one-time *Adjustments* for the **Invoice Transactions** can be added from the **Assignment Details** form.

The 'add placement fee' form is a modal window with a blue header and a close button (X) in the top right. It contains the following fields: 'Active' with a checked checkbox, 'Rate' with a text input containing '\$7,500.00', 'Start Date' with a date picker showing '5/14/2010', and a 'Note' text area. A 'Save' button with a floppy disk icon is positioned at the bottom right of the form.

To open the form to the left, click on the **+** button in the upper right corner of the Direct Hire Fees area. If the *Fee* field is populated the *Rate* in the **Add Placement Fee** form will automatically be populated with the balance amount that should be billed based on any other fees that have already been added to this **Assignment**.

The *Start Date* should reflect a date that falls within the *Weekend Bill Date* (accounting period) that the one-time "DHFee" or "Placement" *Adjustment* should be **Invoiced** in. Once the form is complete click on the *Save* button in the lower right to add the fee and close the form.

The screenshot displays the 'assignment information' and 'direct hire fees' sections for employee Susie Catalano. The assignment information includes fields for Employee, Aident, Customer, Department, Order ID, Assignment ID, Temp Phone, and Status. The direct hire fees section shows a table with columns for Active, Rate, Date, and Note, listing two fees: one for \$2,500.00 on 8/23/2010 and another for \$5,000.00 on 6/14/2010. Above the fees table, there are fields for Fee Percentage, Salary, and Fee.

Active	Rate	Date	Note
<input checked="" type="checkbox"/>	\$2,500.00	8/23/2010	
<input checked="" type="checkbox"/>	\$5,000.00	6/14/2010	

In the view above the one-time *Adjustments* for "Direct Hire" **Invoicing** are displayed below the *Fee* field.

The one-time *Adjustment* will automatically be pulled into **Time Entry** when the *Create Timecards from Assignments* button is clicked, as long as the *Start Date* on the fee occurs during the current *Weekend Bill Date*.

The screenshot displays the 'time entry' section for employee Susie Catalano. It shows a table with columns for S..., Name, Customer, Department, Pay Co..., Shift, RT Hrs, OT Hrs, Bill, Pay, and WE Date. The table contains one entry for Susie Catalano, with a Bill amount of \$7,500.00 and a Pay amount of \$30,000.00. Below the table, there are tabs for 'Pay and Bill Rates', 'Adjustments', 'Overrides', and 'Codes'. The 'Adjustments' tab is selected, showing a table with columns for Adjustment, Amt, Bill Amt, and Invoice Text. The table contains one entry for 'DHFee' with an Amt of \$0.00 and a Bill Amt of \$5,000.00. To the right, there is a 'payroll info' section with fields for WE Bill, WE Date, and Work Date.

S...	Name	Customer	Department	Pay Co...	Shift	RT Hrs	OT Hrs	Bill	Pay	WE Date
	Catalano, Susie	Calendar Wonde...	Primary	Reg		0.00	0	\$7,500.00	\$30,000.00	6/20/2010

Adjustment	Amt	Bill Amt	Invoice Text
DHFee	\$0.00	\$5,000.00	Direct Hire Fee

\*Note – Although the *Bill Amount* can be updated in **Time Entry**, these changes will not be reflected in the **Assignment** screen. For accurate tracking for the Service Rep user, the fee will need to be edited on the **Assignment Details** as well.

Detailed Timecard

Pay and Bill Rates Adjustments Overrides Codes

one time overrides

Fed Withholding  
State Withholding  
Pay Periods  
Check Delivery  
 Do Not E-Pay  
 Pay on Separate Check  
 Show Zero Bill on Invoice

other

Branch Memphis NE  
Acct Code  
Location  
Cost Center  
SubEntity  
Req Number  
Supervisor

Pay Hold  
Invoice Hold  
Cust Extra 1  
Cust Extra 2  
Cust Extra 3  
Invoice Text

payroll info

WE Bill 6/20/2010  
WE Date 6/20/2010  
Work Date  
Inv Date  
Pay Code Regular earnings. Hard coded f  
Skill Code Admin.support/receptionist  
PO Num  
Payroll Note

When the one-time *Adjustment* is added it will automatically have an *Invoice Hold* code of "A" (Adjustment Review Required). To approve this fee for **Invoicing**, highlight and *Delete* the *Invoice Hold* code. Once the code is removed this *Adjustment* can be pulled into an **Invoice** run. Continue **Invoice** processing as covered in the Back Office Training Manual.

\*Note – If the "DirectHire" **Invoicing** requires a different **Invoice Style**, the "DH" **Orders** will need to be set up on a separate *Department* record from the "Temp" **Orders** so that the **Invoice Style** on the "DirectHire" *Department* record can be changed.

#### Still Have Questions?

For more information about direct hire functionality contact our customer support group at 877-452-0327 or by sending an email to [support@tempworks.com](mailto:support@tempworks.com).

To schedule training on using direct hire, submit suggestions on how to improve this document, or to request documentation on other Enterprise functionality please contact our Training Department at [trainers@tempworks.com](mailto:trainers@tempworks.com).