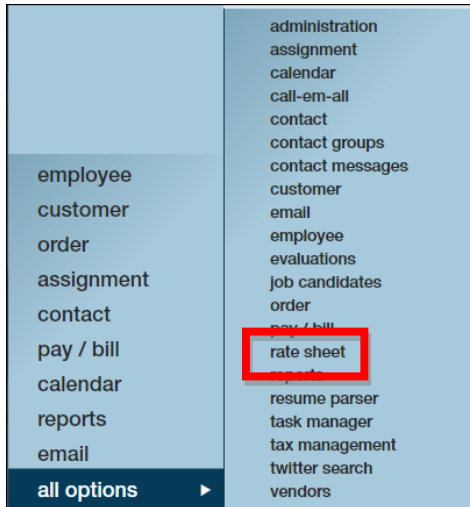


15R1 Enterprise Rate Sheet


The Enterprise **Rate Sheet** can be used to store negotiated **Customer** rates for specific *Job Titles, Shifts, Worksites, Branches, etc.* When an **Order** is created that fits the criteria from a **Rate Sheet** it will automatically populate the rates so that users don't have to calculate the amounts manually.

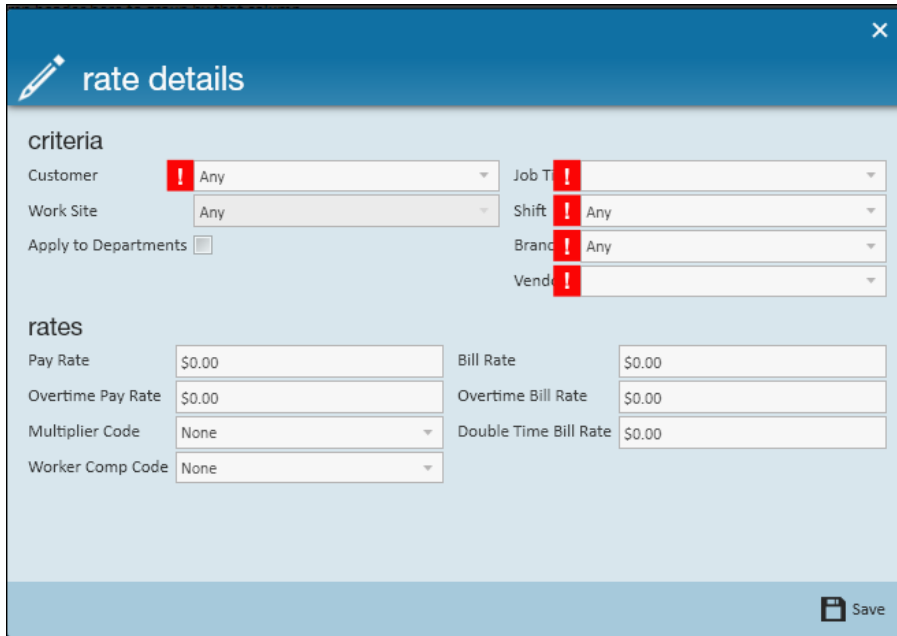


To open the **Rate Sheet** form, select **All Options** from the menu in the lower left and then click on *Rate Sheet*.

Current **Rate Sheets** will be displayed in the form below:

Customer	Department	Work Site	Job Title	Branch	Shift	Pay	Bill
123 Nursing	assembly	Any	Unbillable Overtime	Memphis SE	Any	\$10.00	\$13.00
123 Nursing	HR	Any	Payroll Clerk II	Any	Any	\$15.00	\$48.00
123 Nursing	assembly	Any	Any	Any	Evening	\$10.00	\$20.00
123 Nursing	assembly	Any	Any	Memphis NE	Any	\$12.00	\$26.00
123 Nursing	Primary	Any	Any	Memphis NE	Any	\$0.00	\$0.00
123 Nursing	HR	Any	Any	Any	Any	\$0.00	\$0.00
Any	Any	Any	Data Control Clerk/advance	Any	Any	\$15.00	\$24.00

To add a new **Rate Sheet**, click on the  button in the upper right. This will open the *Rate Details* form as shown below:



The screenshot shows the 'rate details' form with two main sections: 'criteria' and 'rates'. The 'criteria' section includes dropdown menus for Customer, Work Site, Job Title, Shift, Branch, and Vendor, each with a red exclamation mark icon indicating a required field. There is also a checkbox for 'Apply to Departments'. The 'rates' section includes input fields for Pay Rate, Overtime Pay Rate, Multiplier Code, Worker Comp Code, Bill Rate, Overtime Bill Rate, and Double Time Bill Rate.

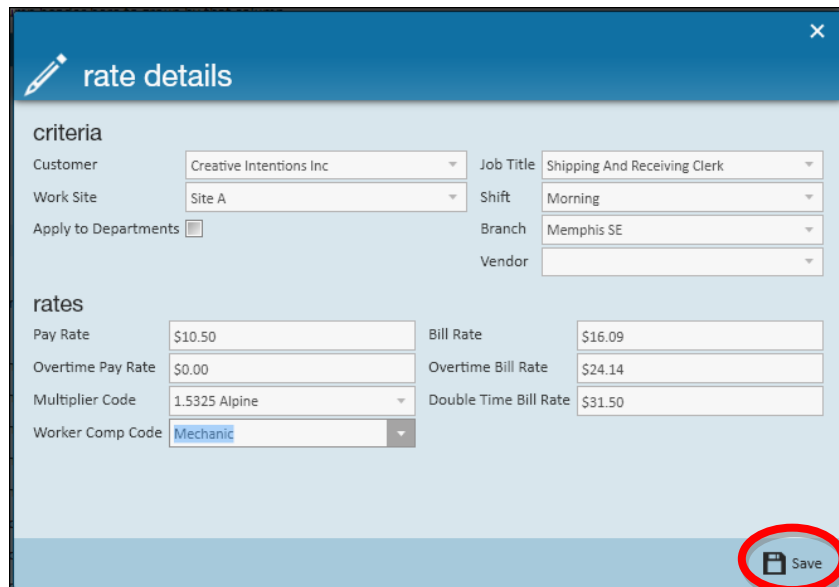
Enter information into the *Customer, Work Site, Job Title, Shift, Branch, Vendor, Pay Rate, Overtime Pay Rate, Multiplier Code, Worker Comp Code, Bill Rate, Overtime Bill Rate, and Double Time Bill Rate* fields.

***Note – the more information that is added into these fields the more specific the **Rate Sheet** will be.**

Clicking in the box for *Apply to Departments* will make this rate applicable to all *Department* records that fall beneath the **Customer** and *Department* selected from the *Customer* drop down menu.

***Note – The *Customer, Job Title, Shift, and Branch* are required fields. They must be selected before saving the *Rate Details* form.**

Once all of the information for the **Rate Sheet** has been added click on the *Save* button at the bottom of the form.



The screenshot shows the 'rate details' form with the following data entered:

criteria	
Customer	Creative Intentions Inc
Work Site	Site A
Apply to Departments	<input type="checkbox"/>
Job Title	Shipping And Receiving Clerk
Shift	Morning
Branch	Memphis SE
Vendor	

rates	
Pay Rate	\$10.50
Overtime Pay Rate	\$0.00
Multiplier Code	1.5325 Alpine
Worker Comp Code	Mechanic
Bill Rate	\$16.09
Overtime Bill Rate	\$24.14
Double Time Bill Rate	\$31.50

The **Save** button at the bottom right is circled in red.

In the example above, a new **Order** was created for the Benefits *Department* (*Sub-Department* of Human Resources) for the "Site A" *Worksite*, "8810" *Worker Comp* code, "Shipping and Receiving Clerk" *Job Title*, on the "Morning" *Shift* for the "Memphis SE" *Branch*. Since the information selected on the **Order** matched up with the **Rate Sheet** created earlier in this document, the rates appeared in the Financial Details section. Click on the button for *Apply Rates*. To ignore the rates, click on the button to *Cancel*.

financial details			
Pay Rate	\$10.50	Multiplier	1.5325 Alpine
Bill Rate	\$16.09	Pay Periods	52
Overtime Bill	\$24.14	GP Percent	
Doubletime Bill	\$31.50	GP Estimate	
Overtime Plan	PlanSTD	Desired GM %	30.00000100

Once the *Apply Rates* button has been selected the *Pay Rate*, *Bill Rate*, *Overtime Bill*, *Doubletime Bill*, and *Multiplier* that were set up in the **Rate Sheet** will be applied to the new **Order**. Select the *Overtime Plan* and *Pay Periods* then *Save* the **Order**.

Still Have Questions?

For more information about rate sheet functionality contact our customer support group at at 651-452-0366 or by sending an email to Support@TempWorks.com.

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