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## 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 Record for **Crom Equipment 10623 (666) 466-7788x Primary**

Inactives:  Customer Lkp:  Cust# Lkp:   
 Departments:

**Status:** A **Related Bal:** \$6,797.27 **Credit Limit:** \$25,000.00 **Note:**   
**Branch:** Downtown **Past Due:** \$0.00 **Sales 12 Mo:** \$2,263.02  
**AR Balance:** \$2,263.02 **Sales YTD:** \$2,263.02 **Last Pay:** 8/14/03

Date	Action	Contact	Message	Rep	Date Due	Completed?
8/7/03	Mailer	Holcomb, Jim	Send letter one to group	dwood	8/8/03	A <input type="checkbox"/>
8/7/03	Contact	Holcomb, Jim	blah blah	dwood		A <input type="checkbox"/>
8/5/03	Email	Holcomb, Jim	Testing Testing testing	dwood		A <input type="checkbox"/>
7/16/03	Placed and			dwood		A <input type="checkbox"/>
7/16/03	Placed	Williams, Leonard		dwood		A <input type="checkbox"/>
7/16/03	Offered	Williams, Leonard	Im on vm	dwood		A <input type="checkbox"/>

Record: 1 of 57

**Department List**

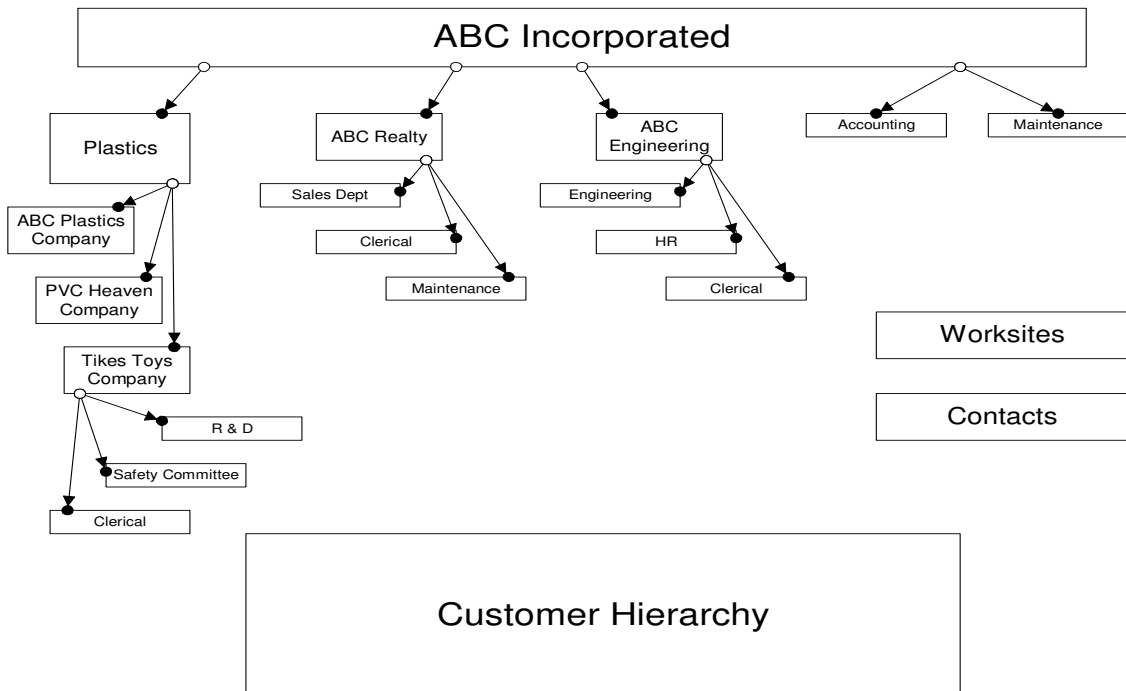
All	Dept Name	Cust Name	Sup/HiringMgr	Status
<input type="checkbox"/>	Accounting	Crom Equipmer	Fisher, Brenda	A
<input type="checkbox"/>	Clerical	Crom Equipmer	Sylvester, Bonnie	H
<input type="checkbox"/>	Corp	CER Company	Fisher, Brenda	A
<input type="checkbox"/>	Warehouse	Crom Equipmer		A

Record: 1 of 4

**Customer Contacts and B.I.'s**

Last Name	First	Title	Phone
Bennett	Fred		
Duncan	Danny	Pres	(651) 555-1212x
Fisher	Brenda	Vp	(561) 345-3463x 4
Guernsey	Jolene		
Holcomb	Jim		(561) 466-7788x

Record: 1 of 8






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.

Visible	Address	Invoicing	Message	Misc	Search	Switch
Basic      Worksite Setup      Sales and Service Information						
<b>Customer</b> ParentID: <input type="text"/>  CustomerId: <input type="text" value="10623"/> Status: <input type="text" value="Active"/> Customer: <input type="text" value="Crom Equipment"/> Department: <input type="text" value="Primary"/> DateCreated: <input type="text" value="12/6/01"/> ActiveDate: <input type="text" value="3/1/02"/>				<b>Billing Address/Location Info</b> <input type="button" value="Copy Main Address"/> ATTN: <input type="text"/> 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"/> Phone: <input type="text" value="(666) 466-7788x"/> <input type="button" value="Chg Ph#s"/> E-mail: <input type="text" value="Crom@Bellsouth.net"/> Website: <input type="text" value="www.cromeq.com"/> 		
<b>Main Address</b> 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"/>				<b>Default Sales Taxes</b> SalesTxServ: <input type="text"/> SalesTxGood: <input type="text"/> <b>Default WorkSite</b> Worksite: <input type="text" value="Warehouse"/>		

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

Within the Address Tab there is a Worksite Setup Subtab, which is where all of the physical worksite addresses can be added.

Basic		Worksite Setup		Sales and Service Information								
▶* Copy Main address												
AddrID:	<input type="text" value="815"/>	<b>Directions</b>		State:	<input type="text"/>							
Worksite:	<input type="text" value="Main Office"/>	<input type="text" value="North on 25th"/>		County:	<input type="text"/>							
AttnTo:	<input type="text"/>			City:	<input type="text"/>							
Street1:	<input type="text" value="3300 Enterprise Drive"/>	<b>Default Dress Code :</b>		School:	<input type="text"/>							
Street2:	<input type="text"/>	<input type="text" value="Jeans and T-shirts with no writing on them"/>		SUTA:	<input type="text"/>							
County:	<input type="text" value="St Lucie"/>			<table border="1"> <tr> <td><b>Exempt</b></td> <td>SD</td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td>City</td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td>Cnty</td> <td><input type="checkbox"/></td> </tr> </table>		<b>Exempt</b>	SD	<input type="checkbox"/>		City	<input type="checkbox"/>	
<b>Exempt</b>	SD	<input type="checkbox"/>										
	City	<input type="checkbox"/>										
	Cnty	<input type="checkbox"/>										
City:	<input type="text" value="Fort Pierce"/>	SalesTxServ:	<input type="text"/>									
State:	<input type="text" value="FL"/> Zip: <input type="text" value="34982"/>	SalesTxGood:	<input type="text"/>									
School:	<input type="text"/>											
Country:	<input type="text"/>											
Record: <input type="text" value="1"/> of 3												

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.

<b>Visifile</b>	Address	Invoicing	Message	Misc	Search	Switch
Refresh	Contract	Invoices	Docs	PlaceOrder	ParentAcct	Payments
TWTrack	SeeOrders	SeeAsgs	SalesHist	AcctView	<b>Opportunity</b>	Support

This will open the Opportunity Form.

+
All

Customer Crom Equipment See

OpportunityId   Active

Description Rent Scaffolding Equipment, work would include: cleaning, stacking, delivery and pickup

Amount \$100,000.00

CloseDate 6/1/03

StageId 6

Probability 99.00%

NextStep Deliver Contract for Signatures

Competitors Eliminated Snelling and Kelly

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 the All button, all Prospects will be displayed who have had an Opportunity Form prepared.

	Customer	Description	Amount	CloseDate	Probability	NextStep	Competitors	LastUpdate	Stage
See	Marda Medical, Inc.	Manufacturing of Medical	\$1,000,000.00	12/14/02	0.1			1/16/03 2:02:23 PM	Letter of intent
See	Harmony Incorporated	Manufacturer of Medical Devices	\$100,000.00	12/31/02	0			1/10/03 10:19:59 AM	Letter of intent
See	Crom Equipment	Rents scaffolding -	\$100,000.00	6/1/03	0.99	Deliver Contract	Eliminated Snelling	4/8/03 8:41:45 AM	Letter of intent

## Invoicing Tab

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

The screenshot shows the Invoicing Tab interface. At the top, there are navigation tabs: Visifile, Address, **Invoicing**, Message, Misc, Search, and Switch. Below these is a Refresh button. The main content area is divided into three sections: Main, Credit and Payroll, and Misc. The Invoicing section includes fields for Style (Invoice), InvCnt (3), Col (\$), InvEmail, GlobalUniqueID (2D-37A690FEE435), and Currency (USD). There are also checkboxes for Collate, EApprv, TimeCardAttach, AllowWebTimeEntry, and Consolidate invoicing w/ parent. The Group invoices by section has checkboxes for Dept, Sup, Aldent, SubE, W/E, Br, CC, Site, PO, SkillCode, Div, and DeptAddr. The Invoicing schedule section has checkboxes for Bill customer daily and Bill customer nonweekly (Yes/No), and a BillCycle dropdown. The Contract section has LkpContract and Contract fields. The Select fields to add to the invoice line item detail section has a table with columns for Invoice Line Item Field and Input Mask.

 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 dropdown 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 InvCnt field.

### Group Invoices By

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

### Consolidate Invoicing with 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.

▶*	All	Dept Name	Cust Name	Sup/HiringMgr	Status
🔍		Accounting	Crom Equipmer	Fisher, Brenda	A
🔍		Clerical	Crom Equipmer	Sylvester, Bonnie	H
🔍		Corp	CER Company	Fisher, Brenda	A
🔍		Warehouse	Crom Equipmer		A

Record: 1 of 4

Add a new level by clicking on the New Record Selector. 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 many 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 New Record Selector within the Contact Section.

▶*	Last Name	First	Title	Phone
▶	Benett	Fred		
🔍	Duncan	Danny	Pres	(651) 555-1212x
🔍	Fisher	Brenda	Vp	(561) 345-3463x 4
🔍	Guernsey	Jolene		
🔍	Holcomb	Jim		(561) 466-7788x

Record: 1 of 8

TempWorks will prompt for the Contact's last name and first name. Once the Contact's name has been entered, the Contact's record has automatically been created within the main Contact area of TempWorks. To navigate to an individual Contact record, click on the binoculars to the left of that particular Contact's name.

### Adding a Contact via the Misc Tab

From the Customer/Misc/Setup form click on the Contacts button.

Visifile	Address	Invoicing	Message	<b>Misc</b>	Search	Switch
Misc Setup		Reports	Interview			
Contacts	Roles	Shifts	Default Interest Codes	Vendor Mgmt	Adjustments	
Last Name      First      Title      Phone      AddressDescriptor						
▶ See Contact Record	Duncan	Danny	Pres	(651) 555-1212x		
Memo						

Enter the information for the Contact to be added.

Use the Roles tab to assign Roles to the Contacts. These Roles are in relation to how the Contact interacts with your company.

Contacts	<b>Roles</b>	Shifts	Default Interest Codes	Vendor Mgmt	Adjustments
Setup default contacts/roles for this customer					
<b>Roles</b> Buying Influence Hiring Mgr HR Coordinator Ordered By Report To Vendor Acct Mgr		<b>Assign Role</b> 		<b>People</b> Benett, Fred Duncan, Danny (651) 555-1212x Elliott, James Fisher, Brenda (561) 345-3463x4 Guernsey, Jolene Holcomb, Jim (561) 466-7788x Nottestad, Aaron Smith, James Sylvester, Bonnie Washington, George (202) 499-6112x Williams, Leonard (561) 345-3463x4	
Type	Lookup	ContactName			
▶ Buying Influence		Benett, Fred			
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 Order 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.

Refresh	Contract	Invoices	Docs	PlaceOrder	ParentAcct	Payments
TWTrack	SeeOrders	SeeAsgs	SalesHist	AcctView	Opportunity	Support
<b>Status:</b> A	<b>Related Bal:</b> \$6,797.27	<b>Credit Limit:</b> \$25,000.00	<b>Note:</b>			
<b>Branch:</b> Downtown	<b>Past Due:</b> \$0.00	<b>Sales 12 Mo:</b> \$2,263.02				
<b>AR Balance:</b> \$2,263.02	<b>Sales YTD:</b> \$2,263.02	<b>Last Pay:</b> 8/14/03				

The Invoices button will automatically navigate you to a list of Invoices for this Customer.  
The Payments button will list all payments made by this Customer.

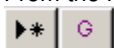
Sales History will list the history of sales (Very similar to the Employee's Pay History.).

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

## Contacts Tab

### Adding a new Contact

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



This will open the Contact Quick Add form.

Cust Lookup: <input type="text"/>		Click here to add a new customer		Lkp Addr: <input type="text"/>	Phone: <input type="text" value="(772) 777-2222x"/>
Company: <input type="text" value="Chamber of Commerce"/>	See Customer			Street1: <input type="text" value="1234 Virginia Avenue"/>	Fax: <input type="text"/>
Department: <input type="text"/>	City: <input type="text" value="Fort Pierce"/>		State: <input type="text" value="FL"/>	Country: <input type="text"/>	E-mail: <input type="text" value="KebMo@Bellsouth.com"/>
First Name: <input type="text" value="Kevin"/>	Nickname: <input type="text"/>	Zip: <input type="text" value="34982"/>	Status: <input type="text" value="A"/>		
Last Name: <input type="text" value="Moore"/>	Mr/Ms/Mr: <input type="text"/>	Type: <input type="text"/>	Go to full contact record		
Title: <input type="text" value="Director"/>					

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. Enter a Contact Status (Active, Prospect, etc). An Active Customer can have a prospective Contact.

Once all information is entered, click Go to full contact record. 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 in the Contact/Misc/Interest Code form.

Visifile	Address	Message	<b>Misc</b>	Report
Orders	Groups	Interest Code	Document	
View codes of type:		Select code		
<input type="text"/>		<input type="text"/>		
Lkp	InterestCode	Note		
	Forklift			
	Accountant			
	Engineer			

### Personal Sales Call

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

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

<b>Misc</b>	Report	Search	Switchboard
Interest Code	Document	<b>Personal Call</b>	

Date of Call:		Service Representative:	
4/8/03		dwood	
CompanyName:		DepartmentName:	
ABC Incorporated		Corporate	
LastName:	FirstName:	Position:	
Moore	Kevin	Director	
Address:	City:	Office Phone:	
1234 Virginia Avenue	Fort Pierce	(772) 777-2222x	
Specific Call Objective:			
Discuss the possibility of setting up a meeting with the Owner of ABC Incorporated.			
Call Summary:			
Per Kevin ABC has a definite need of machine operators as production is increasing at a steady pace.			
Anticipated Future Needs:			
Possibly 20-25 machine operators over the next 2 months.			
Commitment Received:			
James Collins is willing to meet over lunch next week.			
Suggested FollowUp:			
Monday April 21st, breakfast meeting at Linsey's.			
Other Relevant Call Data (Collateral Left, Etc):			
Need to take all sales material and case studies pertaining to manufacturing.			

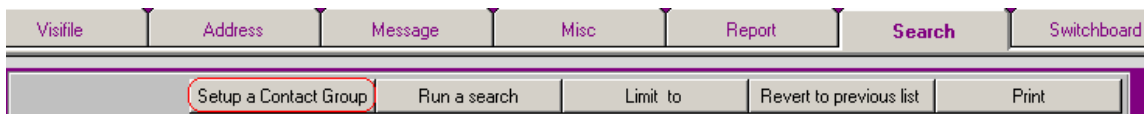
Fill out all necessary information pertaining to the Personal Call.

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.



This will open the Contact Group Form.

Groupid # Lkp:  View active

Groupid:  7 NewGroup

GroupDescription:  Members Letters Directory Switchboard

DateStarted:  Active:

Create follow-up tasks of this action type for group members.

Message:

Return to Contacts Screen

Delete this group and its members.

Create report showing all contact messages to this group

Flag group members as having this follow-up task completed.

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

To add Members click on the Members Tab.

Add current contact to group Add all contacts in contact directory screen to group

Name	Company	Phone	Email	Removed
▶ Moore, Billy	Atlas Footwear	(513) 858-6764x123	HiringManager@tempworks	<input type="checkbox"/> See contact
Moore, Claudia	ACI	(612) 405-2022x120	HiringManager@tempworks	<input type="checkbox"/> See contact
Moore, Kevin	Chamber of Comm	(772) 777-2222x	KebMo@Bellsouth.com	<input type="checkbox"/> See contact
Moore, Ronald	ABC Incorporated	(561) 234-2522x		<input type="checkbox"/> See contact
* <input type="text"/>				<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. Within the Members form click 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.

Groupid:  7 NewGroup

GroupDescription:  Members Letters Directory

DateStarted:  Active:

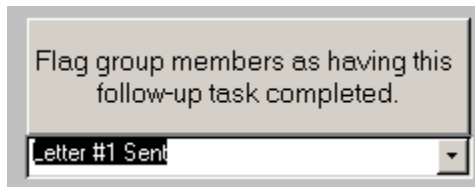
Create follow-up tasks of this action type for group members.

Message:

Letter #1 Sent

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, Check, Invoice and Customer. 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 sub tab.

▶*		Refresh	Edit				
Link to Employee:		<input type="text"/>	<input type="text"/>	To create a message, click on the new record icon. Optionally select the related employee/contact.			
Date/Time	Action	Customer	RepName	Inv#	ChkId#	OrderId#	DocId#
4/18/03 8:39:00 AM	Lunch	Chamber of Commerce	dwood				
Emp/App:		E		12:00 noon lunch at Tavern on the Green, legal discussion regarding			
Contact:	Moore, Kevin	C		policies and procedures			
Due:	8/16/03	Cmp:	A	<input type="checkbox"/>			

### Step 3

Click the New Record Selector button from within the Message sub 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.



Specific Actions may open the Activity Scheduler.

### 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 Checks. 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.

Date/Time	Action	Customer	RepName	Inv#	ChkId#	OrderId#	DocId#	
4/18/03 8:39:00 AM	Lunch	Chamber of Commerce	dwood					
Emp/App#:		E	X!	12:00 noon lunch at Tavern on the Green, legal discussion regarding policies and procedures				X!
Contact:	Moore, Kevin	C	X!					X!
Due:	8/16/03	Cmp:	A					X!

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 that will not be linked to anything else within TempWorks-**Stand Alone Activities**

There are two ways to access the Activity Add Anything form

1. CTRL-Y.
2. Navigate to the Activity Planner (press F12 on your keyboard or click the Activity button in the WorkFlow toolbar). Once the Activity Planner is open, click on the Add Activity button.



Link to Emp:	Act		ID:	Ident:
Link to Contact:			SSN:	
Link to Applicant:			CustID:	
Activity:	Message		aid:	
Employee:			Action:	message
Contact:				
DateDue:		3/25/2002		
Complete:	<input type="checkbox"/>		Link to Order Now Open	
DateComplete:			Copy message	
PartyResponsible:	dwood		Don't create this activity	
Customer Name:			Open activity planner	
Order Number:			Done	
Priority:				
TimeAlloted:				
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**.

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.

	Activity	Party Responsible	Emp/Appl	Contact	Customer	Date Due	✓	Phone#	Comment
 	Message	dwood		Moore, Kevin	Chamber of C	8/16/03	<input type="checkbox"/>	(772) 777-2222x	12:00 noon lunch at Tavern on the

There are two buttons to the left of the Activity.

Edit button:



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

Copy button:



To copy an existing Activity, click the edit button. The Activity Add Anything 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 checked="" type="checkbox"/>	Phone#	Comment
Message	dwood		Moore, Kevin	Chamber of C	8/16/03	<input type="checkbox"/>	(772) 777-2222x	12:00 noon lunch at Tavern on the

If an Activity is linked to an Employee, Contact, Customer or Order you can navigate to any 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 appears in the Check Box.

Activity	Party Responsible	Emp/Appl	Contact	Customer	Date Due	<input checked="" type="checkbox"/>	Phone#	Comment
Message	dwood		Moore, Kevin	Chamber of C	8/16/03	<input checked="" type="checkbox"/>	(772) 777-2222x	12:00 noon lunch at Tavern on the

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.

### How the Activity relates to the Message

Information from the Activity Planner is displayed within the Message of each individual record.

#### Visifile Sub Tab

Msg Date	Action	Message	Rep	DateDue	Completed?
10/4/2002	Contact		dwood	10/5/2002	<input checked="" type="checkbox"/> A
9/26/2002	Contact	Scheduled lunch with Jim	dwood		<input type="checkbox"/> A

Within the Message area of the Visifile, the Due Date and Complete check box are displayed. Also available is a navigational button "A" which when clicked will navigate you to that specific Activity within the Activity Planner.

#### Message Sub Tab

Date/Time	Action
10/4/2002 12:19:00 F	Contact C
Emp/Appl: Smith, Jagendra a	E X!
Contact: Holcomb, Jim	C X!
Due: 3/5/2002 Cmp: /15/2002	A <input checked="" type="checkbox"/>

Within the Message Sub Tab of the record the Due Date, Complete Date and Complete check box are displayed. Also available is a navigational button "A" which when clicked will navigate you to that specific Activity within the Activity Planner.

### 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.

Visifile	Order Details	PO/Misc	Asg	Candidate	Message	<b>Directory</b>	Switchboard
Unfilled Orders	Pending Confirmations	All Recent Orders	<b>Other Order Searches</b>	Inquiries	Unmade Arrival Calls		

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

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.

Unfilled Orders	Pending Confirmations	All Recent Orders	Other Order Searches	<b>Inquiries</b>	Unmade Arrival Calls
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## 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 that can be stored.

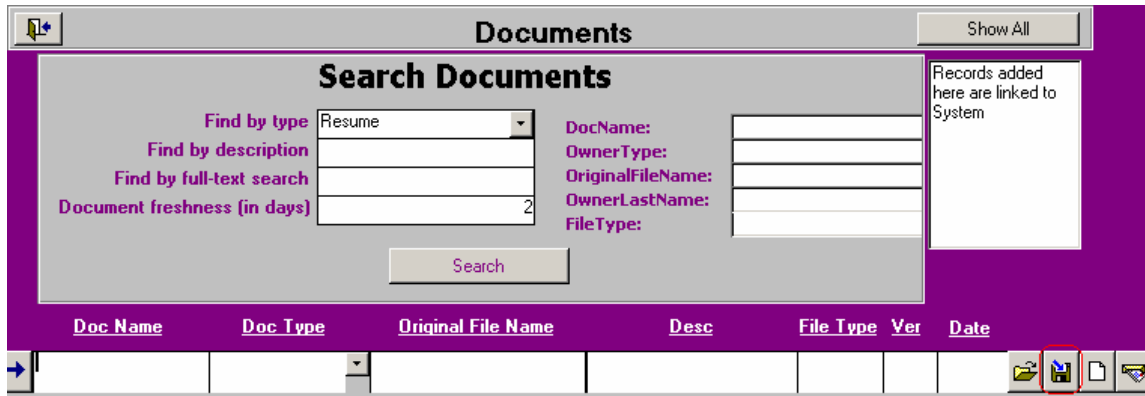
There are four areas in which to store documents (where a document is stored is dependant upon the type of document), Associate, Customer, Contact and the General Documents tab. Once the document is housed within any of these areas, steps in working with the documents are the same.

### Adding Documents

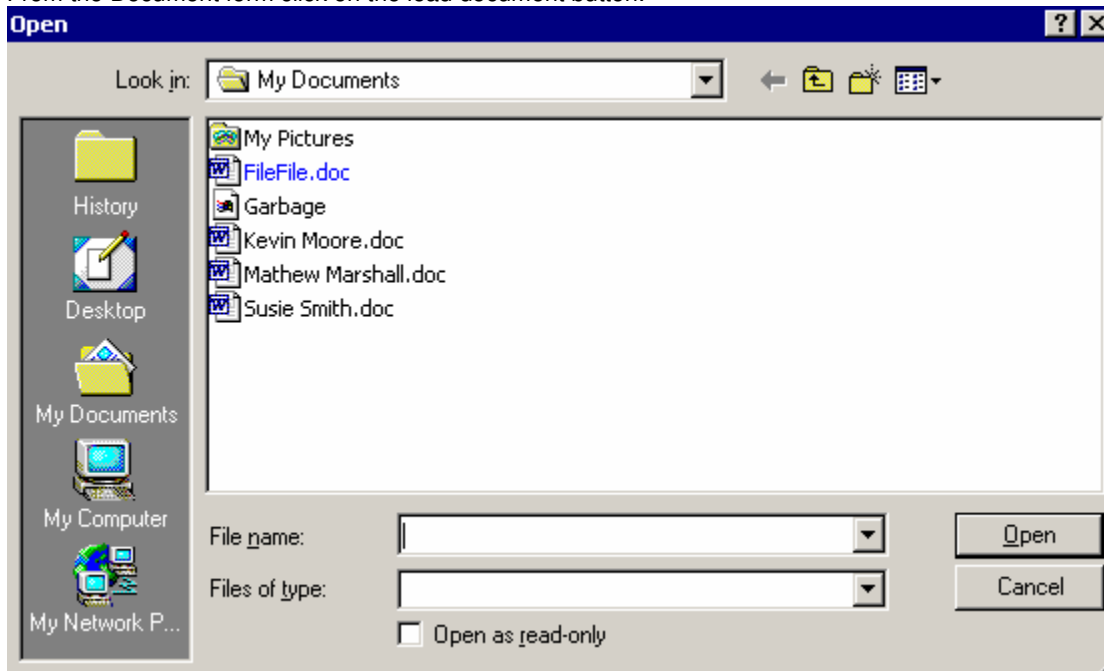
Documents can be loaded from different areas depending on the nature of the Document:

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

The documents form opens from any of these areas.



From the Document form click on the load document button.



Click to highlight the Document you would like to load and then click Open. This will attach the Document to the record you are looking at within TempWorks.

Doc Name	Doc Type	Original File Name	Desc	File Type	Ver	Date
8 week camp #1	Marketing	Kevin Moore.doc	New document	doc	1	8/14/03

Name the Document in the DocName field. Also, verify the Document Type.

Doc Name	Doc Type	Original File Name	Desc	File Type	Ver	Date
8 week camp #1	Marketing	Kevin Moore.doc	New document	doc	1	8/14/03

Once a Document is attached:

Use the Open Button to open the Document.  
Use the E-mail Button to E-mail the Document.

### E-mailing Documents

Click on the E-mail Button. This will open the EmailGroup Form.

**TempWorks Email** EmailGroupID 352

Recipients:

Email Subject:

Return Email: dalyce@tempworks.com

Use Plain Text (not html)  
 Send to Return Address

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

Click to add attachment from document form | Attach from local file

Selected	Embed Attachment	Doc Description	Original FileName	Attach Doc	Attach Doc FilePath
<input checked="" type="checkbox"/>	<input type="checkbox"/>	New document	Kevin Moore.doc	<input type="checkbox"/>	

Enter an E-mail Subject.

Attach additional documents, if desired, by clicking "Click to add attachment from document form." When the documents open click the E-mail button of the document you would like to attach.

Add a Text Body to your E-mail.

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

**Text:** ABC

Are you troubled by constant interview that seem to go nowhere? If you would like help in alleviating this trouble, see the attached

Choose the recipients of your E-mail from the Recipients tab.

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

**Recipient Search:** Email Source: Contact

Last Name:   
First Name:   
Company Name:

Include Inactive

**Search Results:**

ID	LastName	FirstName	Email	CompanyNa	Add All
592	z6	w6		SHRA Inc	Add
593	Brady	Scott		AI's Market	Add
594	Frost	Jack		AI's Market	Add
595	Camel	Joe		AI's Market	Add
596	Horn	Ilina		Comfit Inn	Add

**Recipient List:**

Selected	Email	Recipient Name	LastName	FirstName	Source
<input checked="" type="checkbox"/>	jim@tempworks.com	Holcomb, Jim	Holcomb	Jim	Contact
<input checked="" type="checkbox"/>	Craig@tempworks.com	Bradley, Craig	Bradley	Craig	Contact
<input checked="" type="checkbox"/>	Barry@Lawnwood.com	Sanders, Barry	Sanders	Barry	Contact

To look up the Recipient(s), type in the E-mail Source area by Contact, Employee or Service Rep. Look up individual Recipients by Last name, First name or Company name.

On the right, select the Recipients by clicking the Add button.

Once the Documents and Recipients are chosen, click the E-mail button to send the message.



After sending the Document, a Message is logged within each Recipients record including the Subject, Text and Document number sent.