

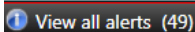
## Enterprise Version 12R4 Changes

### Detailed Notification Manager

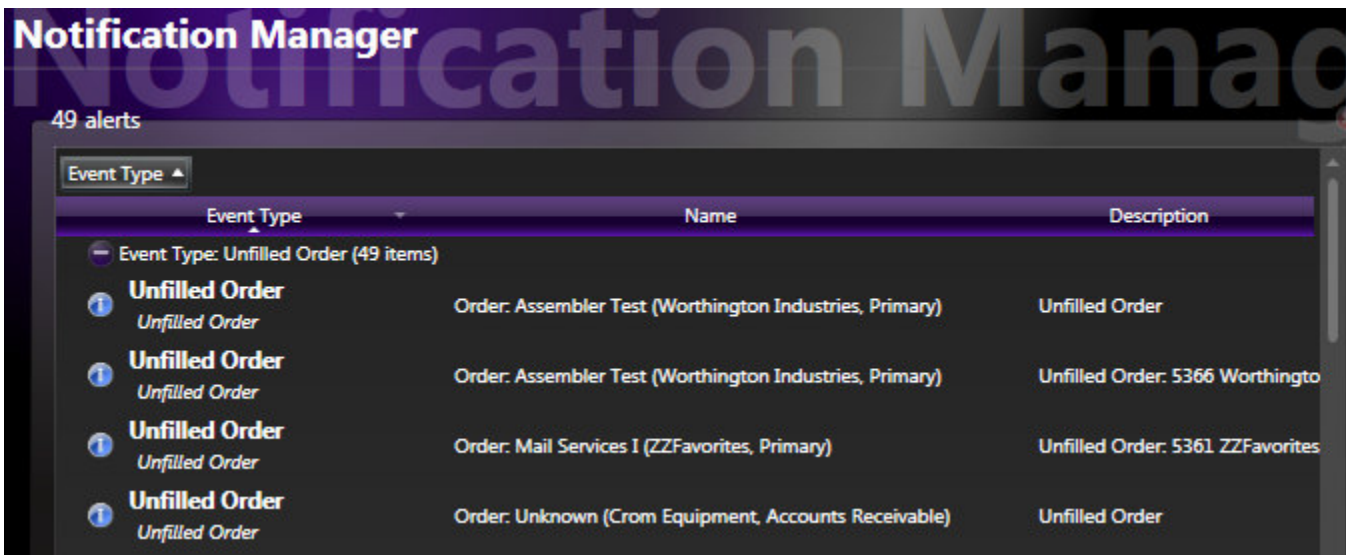
The improved **Notifications** function displays I-9 alerts, unfilled **Orders**, online application submissions, and pending web **Orders** and the details about these alerts. If you have only one or two alerts they will display as **Notification** lines at the top of your Enterprise screen as shown here:


 1 Unfilled Order Order: Executive Administrative Assistant (Uline Products Inc., Uline - Janet)  
 1 Unfilled Order Order: Assembler Test (Worthington Industries, Primary)

If more than two alerts are prompted you will see a line at the top of your Enterprise screen that says "View all alerts" followed by a number in parentheses (). The number in parentheses is the total number of alerts in your **Notification Manager** currently as shown in the picture below:

 View all alerts (49)

When more than two alerts are needed, clicking on the *View all alerts* will display the full screen **Notification Manager**. You can sort the alerts based on *Event Type*, *Name*, and *Description* by clicking on the column headers.





**Notification Manager**

49 alerts

Event Type ▲

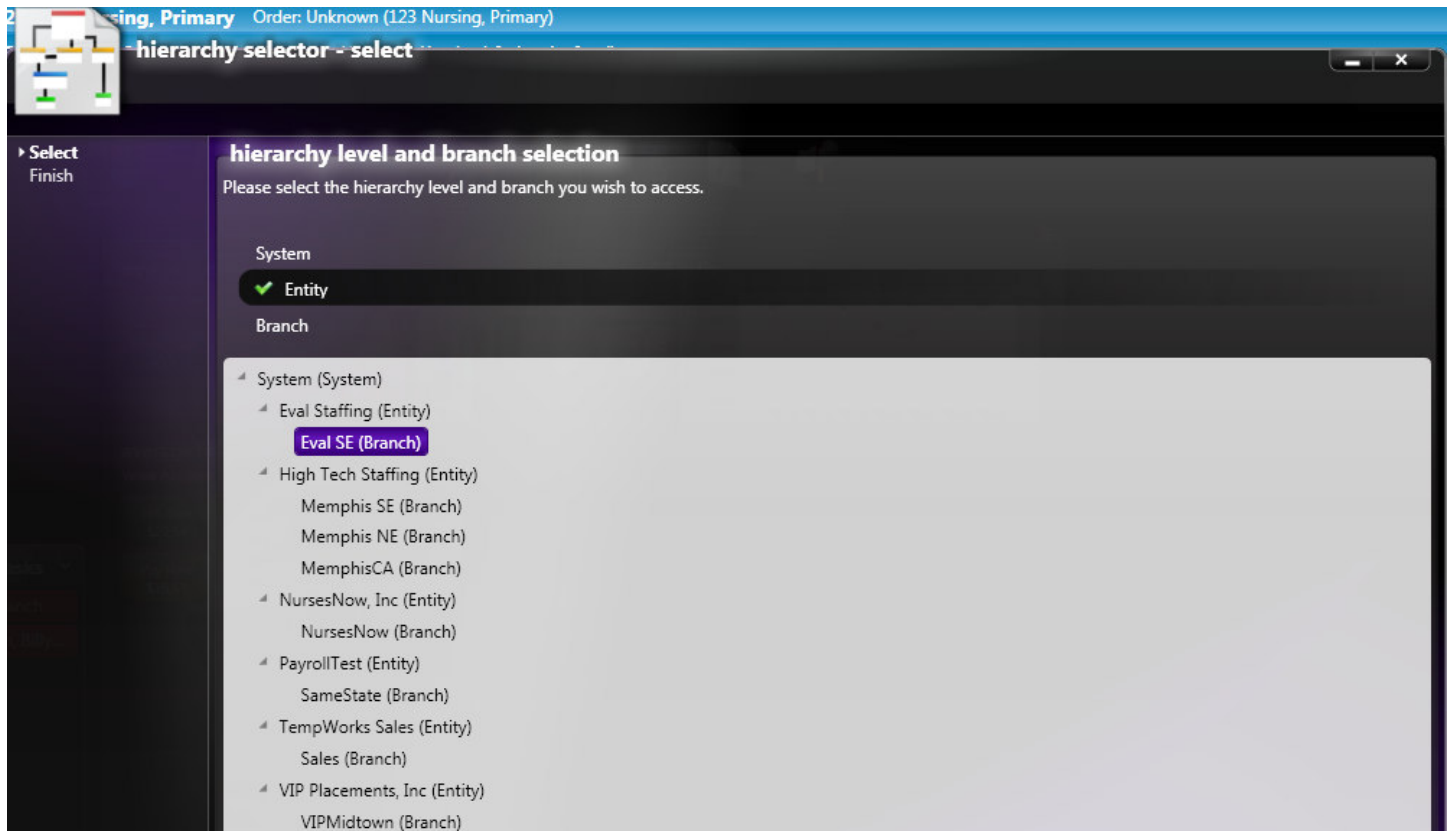
Event Type	Name	Description
Event Type: Unfilled Order (49 items)		
1 Unfilled Order Unfilled Order	Order: Assembler Test (Worthington Industries, Primary)	Unfilled Order
1 Unfilled Order Unfilled Order	Order: Assembler Test (Worthington Industries, Primary)	Unfilled Order: 5366 Worthingto
1 Unfilled Order Unfilled Order	Order: Mail Services I (ZZFavorites, Primary)	Unfilled Order: 5361 ZZFavorites
1 Unfilled Order Unfilled Order	Order: Unknown (Crom Equipment, Accounts Receivable)	Unfilled Order

To navigate to the corresponding record for an alert you can right click on the line of the **Notification**. Then select the record from the drop down that you would like to view. To clear a **Notification** highlight the line and then click on the  in the upper right of the **Notification Manager** screen, or click on the  if only one or two alerts are displayed.


## Simplified Hierarchy Selector

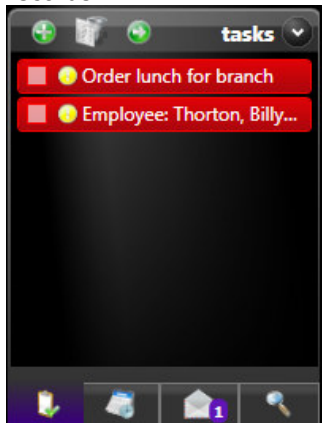
To change levels within your company hierarchy click on the “Hier Name” function at the bottom of the screen:


**Hier Name: High Tech Staffing** Once this function is clicked the *Hierarchy Selector – Select* form will be displayed as shown below. Click on the correct hierarchy level (System, Entity, Branch, etc.) and then double-click on the *Branch* record that you need. This will update your hierarchy and bring you back to the Enterprise **Main Screen**.




## Improved Task Management

The **Tasks** area displays items that require user follow-up. Now, in addition to being able to create **Tasks** from *Messages* and *Incoming Email* you can also drag and drop records or click on the  button in the **Tasks** area to create new **Task** records.



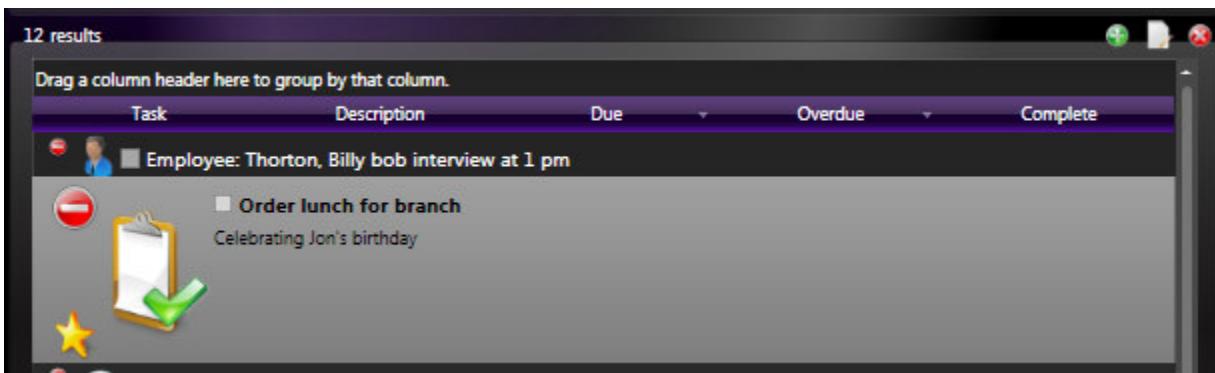
The **Tasks** box displayed to the left is located in the lower left of the Enterprise screen. Clicking on the  allows the user to create a new **Task**. When an Enterprise record is open (**Employee, Customer, Order, Contact**, etc.) a **Task** can be created for that record by clicking on the avatar area and dragging and dropping the record in the **Tasks** box.

**Tasks** can also be created within the Follow-up area of any *Message* record or from an *Incoming Email*.

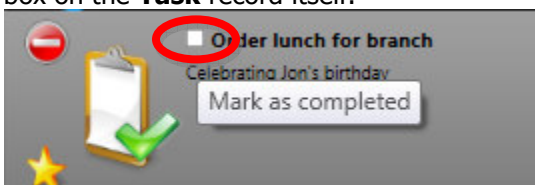
When the  button is clicked the full screen **Task Manager** will be displayed as shown in the next picture.




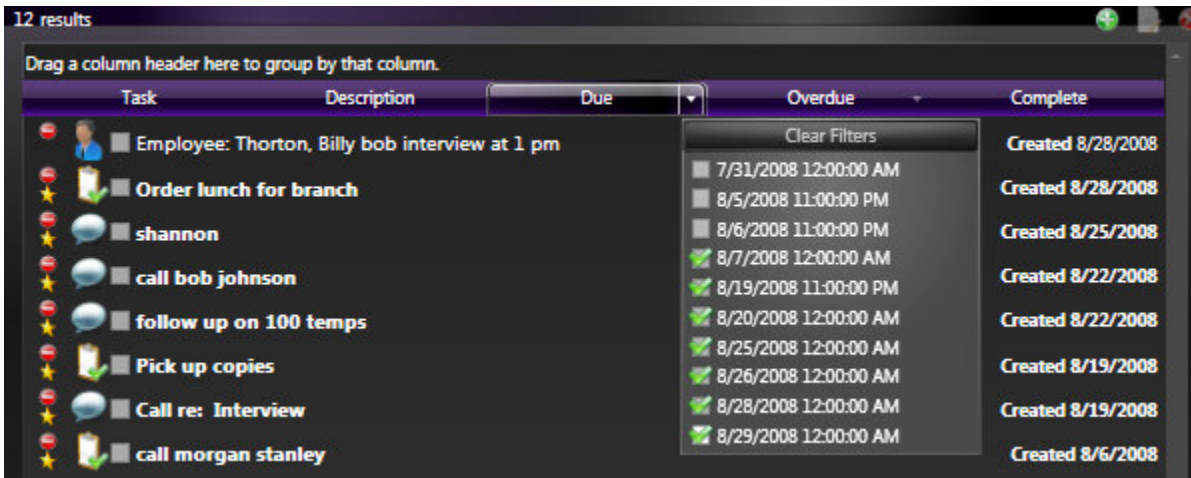
**Tasks** can be viewed for the entire branch from this screen and can be filtered by *Task Type*, *Assigned To*, and *Creation Date*. To create a new **Task**, click on the button in the upper right.



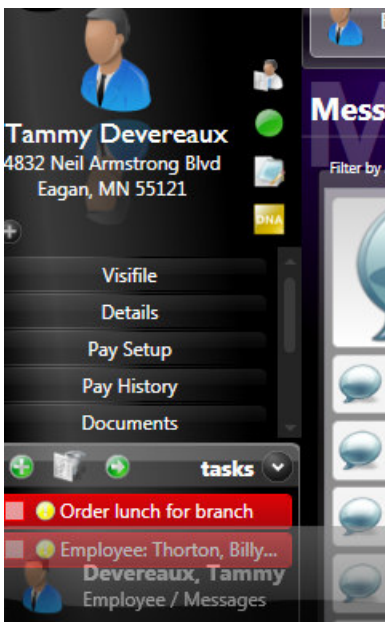
When a **Task** record is clicked it will expand to display any **Task** message text. To edit the **Task** once it's expanded click on the . To mark the **Task** as completed click on the button with the **Task** expanded. You can also click in the box on the **Task** record itself.



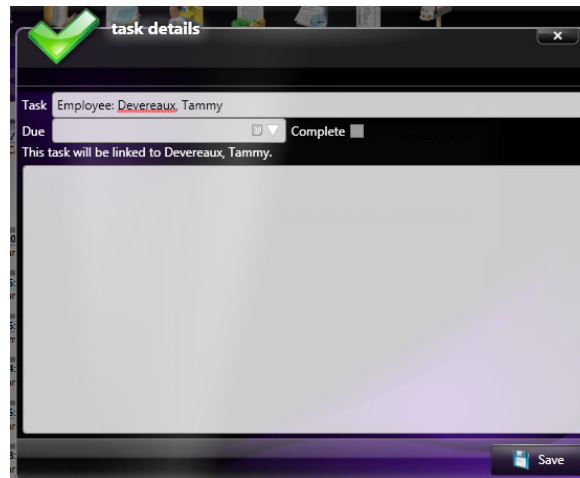
You can also display **Tasks** for a specific date by clicking on the  buttons to the right of the *Due* and *Overdue* column headers.



Click in the box to the right of the *Due* date to display **Task** records with the selected date. In the *Overdue* column you can select the *True* box to display all **Tasks** that have surpassed their *Due* date and are not yet completed.



In the example to the left a new **Task** is being created for Tammy Devereux by selecting her picture in the avatar area and dragging the record down to the **Tasks** box and then dropping it.



This opens a **Task** record that will be linked to Tammy and will be displayed as a *Message* in her record. Add any additional title information to the *Task* field, enter a *Due* date and further text can be entered in the large gray box at the bottom. Then click on the *Save* button to save and close the new **Task** record and link it to Tammy's **Employee** record.

## International Payroll Features

Enterprise now contains *Country* fields in major records like the **Employee**, **Customer**, **Contact** and *Worksite*. These additional *Country* fields allow users to process **Payroll** and even **Invoicing** for Canadian customers. In the future **Payroll** and **Invoicing** for **Employees** and **Customers** in additional countries can be added.

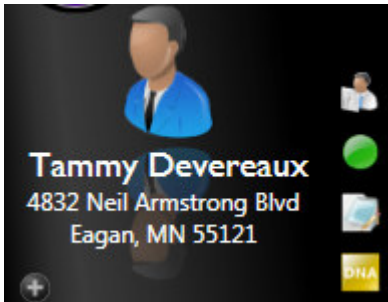
Uline Products Inc., Uline - Janet

### add new employee


**personal information**

SS#	<input type="text"/>	Street	<input type="text"/>
First Name	<input type="text"/>	Street 2	<input type="text"/>
Last Name	<input type="text"/>	City	<input type="text"/>
Initial	<input type="text"/>	State	MN
Phone	<input type="text"/>	Zip	<input type="text"/>
Email	<input type="text"/>	County	<input type="text"/>
		School District	<input type="text"/>
		Country	United States of America

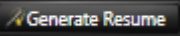
## Employee Subcontractor Notification



In the **Employee** avatar area we have added a symbol that will display if the **Employee** is a subcontracting vendor. This means that the **Employee** has a *Vendor* selected on the **Details** form.

The  symbol will only display in the avatar area if the **Employee** should not receive a form W2 at the end of the year (ie. subcontractor or 1099 **Employee** record).

## Employee Resume Generator

The *Resume Generator* functionality allows the user to create a simple resume for the **Employee** from information that has been entered into their record under *Past Jobs, Education, and Interest Codes*. There are two places where an **Employee's** resume can be generated. In the **Employee Details** form click on the  button in the middle of the page. You will need to give this document a *File Name* and Enterprise will save it to your computer as a PDF document. You can also select to have the PDF document open after it's created. A sample of this document is displayed below:

**Tammy Devereaux**  
**4832 Neil Armstrong Blvd**  
**Eagan, MN 55121**  
**6515551212x**  
**Tammy@aol.com**

### Education

University of Minnesota - Twin Cities	5/1998	Dates Attended: 9/1994	GPA: 3.2
Apple Valley High School	High School Diploma	Dates Attended: -	GPA: 3.7

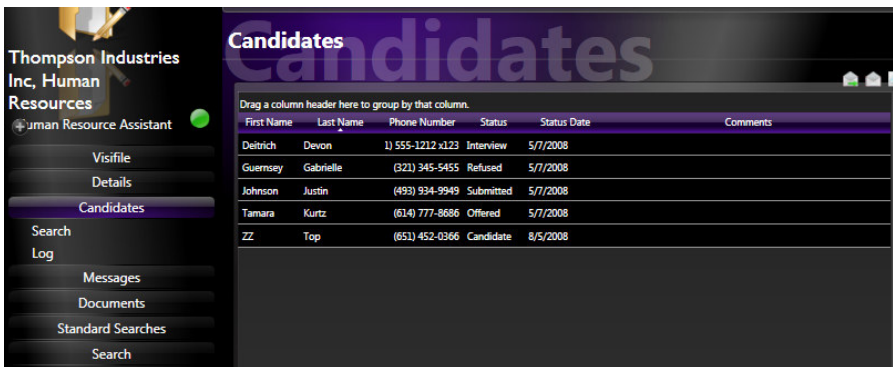
### Work History


Best Buy	Apple Valley, MN	Position: Operations Manager	From: 9/5/1998 12:00:00 AM To 7/1/2007 12:00:00 AM
Urban Outfitters	Eagan, MN	Duties: Managed operations Position: Salesperson	From: 10/15/1995 To 6/15/1998
		Duties: Sold luggage	

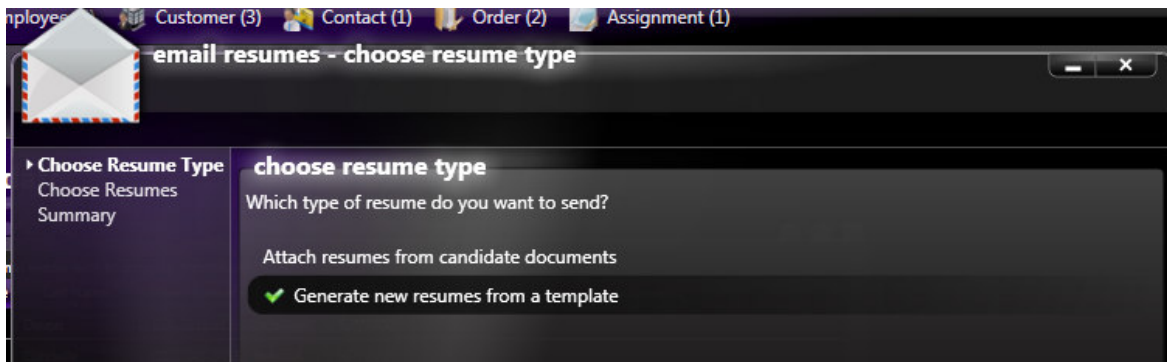
### Skills

Bilingual-French	Years: 5
Data Entry	Years: 5
Drug Test	
Administrative Assistant	Years: 5
Background check	
Word	
Concrete Work	Years: 7
1st Shift	

The other place that a resume can be generated is from the **Order Candidates** form.

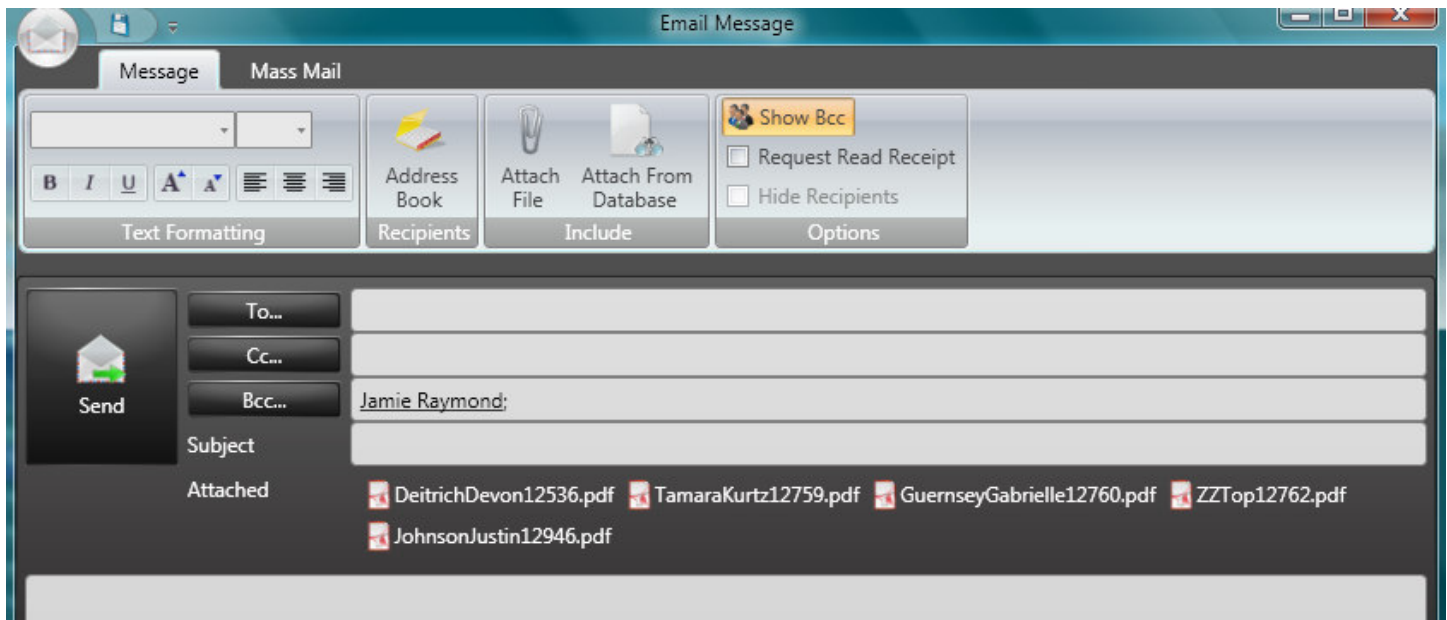


When you have selected **Employee's** (shown to the left) and click on the  button in the upper right, the next form will open and allow you to select to attach resume documents or to create resumes using the generator.



Select the *Generate new resumes from a template* option and then click on *Next* at the bottom of the form.

Follow the remaining steps in the *Email resumes* wizard to create an *Email* to the **Order Supervisor** similar to the one below:



Add a *Subject* and *Email* text and then click on the *Send* button. This will log a message in the **Contact** record that this *Email* was sent to the *Supervisor*.

## Employee Candidacy Tracking

When an **Employee** is attached as a *Candidate* to the **Order** record it displays a corresponding *Candidacy* record in their **Employee** file. This *Candidacy* record allows a user to determine if an **Employee** has refused an open position, or if they have had their resume submitted. You can even see if the **Employee** has been interviewed for a position.

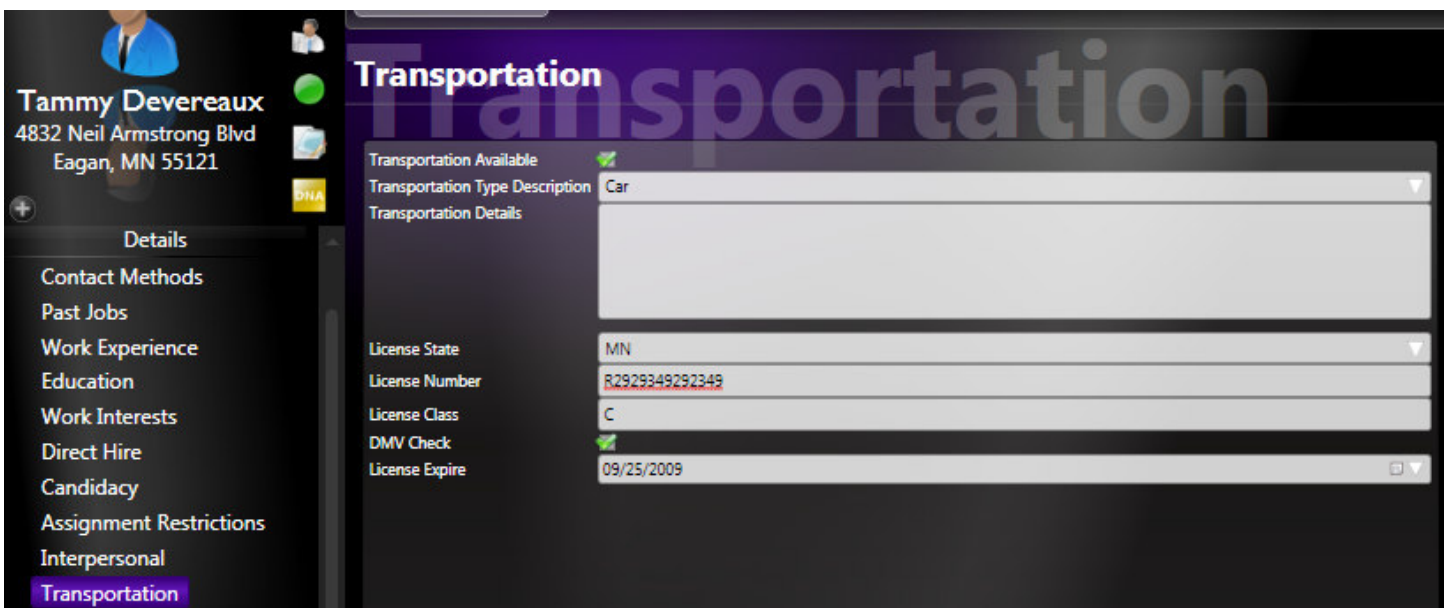


Customer	Order	Status	Date	Comments
Larson Companies	5073	Interview2	1/11/2008	
Creative Solutions	5034	Candidate	12/21/2007	fghg
Creative Intentions Inc	5229	Candidate	8/6/2008	
Crom Equipment	5300	Refused	4/14/2008	
Crom Equipment	5330	Approved	7/22/2008	
Worthington Industr...	5343	Candidate	7/29/2008	
Unique Gifts Inc	5319	Offered	5/2/2008	
Crom Equipment	5362	Candidate	8/20/2008	
Jimmy's Pizza	5502	Candidate	8/25/2008	
ABC Corporation	5465	Submitted	8/6/2008	

Their current *Status* can be changed from the *Candidacy* form by right-clicking and selecting the *Change Status* option. Any changes made from the **Employee Candidacy** form will also link back to the **Order** record and create a *Message* in both.

## Employee Transportation Tracking

The *Transportation* form can be used to track an **Employee's** mode of transportation, and if you're staffing drivers (or other **Employee's** that need a valid driver's license for their position) you can track the information in this form.



Transportation Available	<input checked="" type="checkbox"/>
Transportation Type Description	Car
Transportation Details	
License State	MN
License Number	R2929349292349
License Class	C
DMV Check	<input checked="" type="checkbox"/>
License Expire	09/25/2009

Enhanced Search Functionality

We have added additional search functionality to all of the major records that can be selected from that record's **Search** form. Below is an example of the **Employee Search** form where you can click on the links for Familiarity Options, Location Options, and Profile Options. You can also filter the records by their **Assignment** status, "active" *Status*, *Rep Name*, and *Branch*.

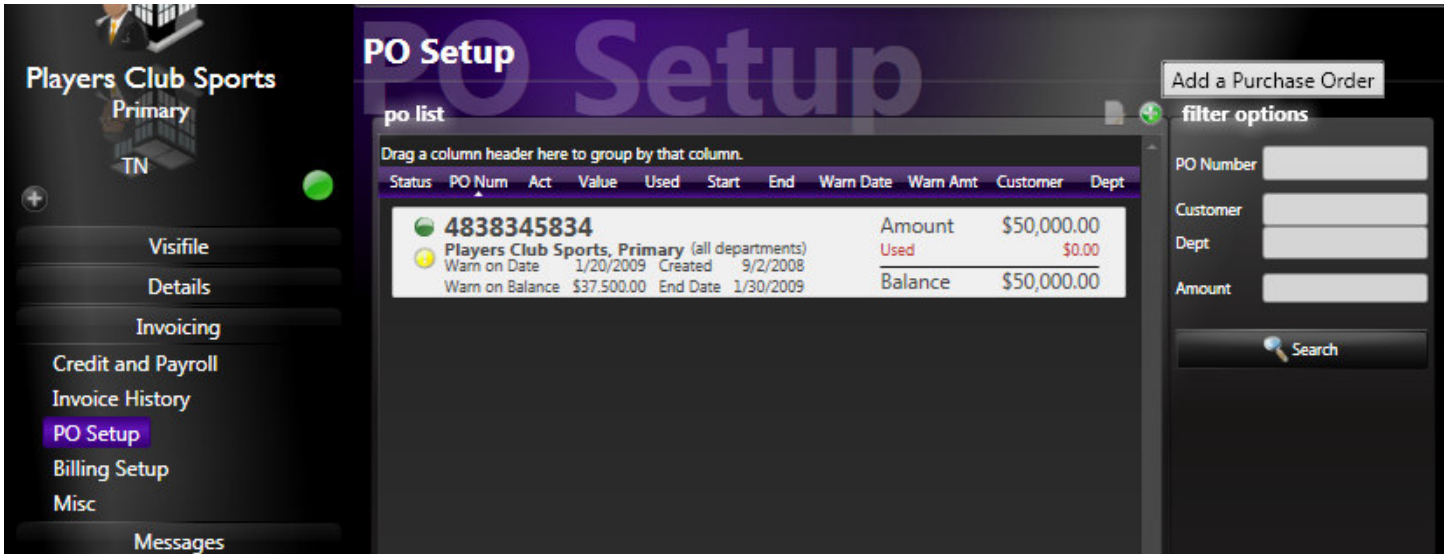
The screenshot shows the 'Search' interface. On the left is a user profile for Tammy Devereaux. The main area is titled 'Search' and contains various search criteria fields: Name, SSN, ID, Assigned (All Records), Status (Active Records), RepName (All), Branch (All), Last Contact (Days, All), WashedStatus (All), Customer (Customer), Area Code, City, Zip/Distance (55121-10), Resume Text, Interest Code, Secondary Code, and Pay Desired. Below the criteria, it states 'Your search returned 229 results.' and provides a table of results.

ID	Name	Branch	Phone	Act	Asg	Message	Assignment	Msg Date	Zip	Rank
13142	Abontina, Susie	Memphis NE		<input checked="" type="checkbox"/>	<input type="checkbox"/>			6/17/2008	55123	0
12045	Anderson, Eric	Memphis SE	651) 555-1212 x123	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	zzz		12/14/2006	55123	0
13240	Ankerton, Lucy	Memphis NE		<input checked="" type="checkbox"/>	<input type="checkbox"/>				55123	0
12189	Bailey, Brian J	Memphis SE	651) 555-1212 x123	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Message	Johnson Su...	4/3/2008	55121	0
11971	Barker, Roberto	Memphis SE	651) 555-1212 x123	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Message	ABC	5/14/2008	55121	0
13237	Bauer, Eddie	Memphis NE		<input checked="" type="checkbox"/>	<input type="checkbox"/>				55123	0
12648	Becker, Polly E	Memphis SE	(952) 417-0755	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Absent (S...	Flemming Inc	1/11/2008	55416	0
5052	Becker, Sam I	Memphis NE	651) 555-1212 x123	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Refused	775-writer	2/20/2008	55068	0

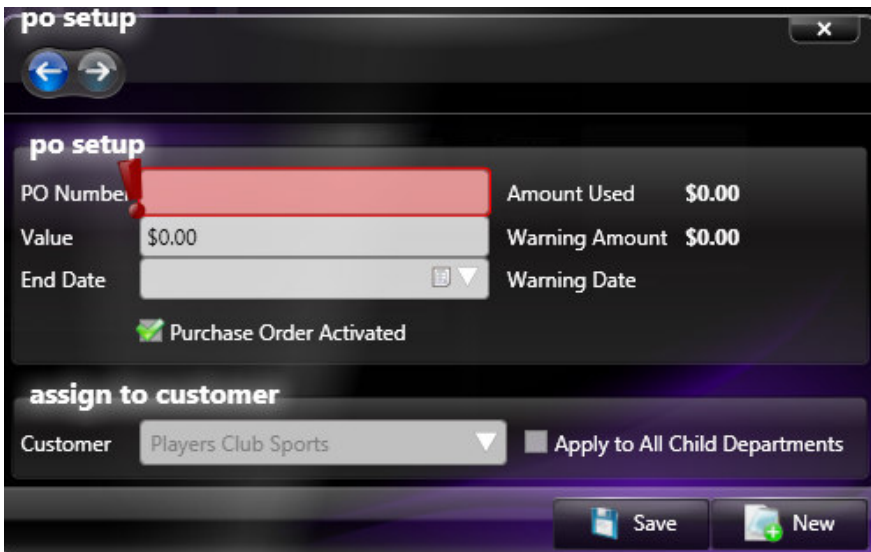
Multiple criteria can be entered simultaneously, or you can clear criteria after each search and if the *Limit to List* box is checked the search will be conducted on only the current results displayed. You can also select the record lines of one or more **Employees** and use the button in the upper right to send a mass *Email* to all selected **Employee's**.

Purchase Order Entry and Tracking

**Customer** *Purchase Orders* can now be entered within Enterprise in the **Customer** record and selected on the **Order**. A full list of *Purchase Orders* can be displayed in the **Payroll/Invoicing** area. In the **Customer** record *PO Setup* is located under **Invoicing**. In the **Order** record it's found under **Details**. In **Payroll/Invoicing** the **PO Setup** is listed right below the **Check Register** on the left side of the screen.



To add a new *Purchase Order* to the system open the **Customer** record to the *PO Setup* form and click on the  in the upper right corner. The following form will be displayed:



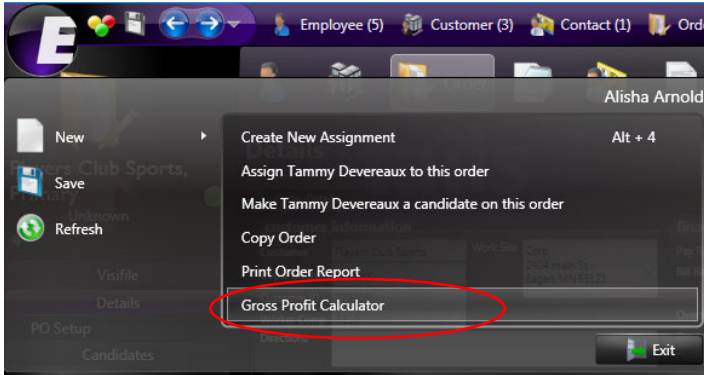
Enter the *PO Number* (required) and then you can add a *Value*, *End Date* and select to *Apply to All Child Departments* by clicking in the box.

Once the information has been entered click on the *Save* button. This will add the record and close the form.

Click on the *New* button to save this record and clear the form so that another *Purchase Order* can be entered.

Order Gross Profit Calculator

With the 12R4 release we have added a *Gross Profit Calculator* that you can access when you are in the **Order** record area. The *Gross Profit Calculator* is opened from the *E* menu in the upper left and then select the *Gross Profit Calculator* option.



The form below will be opened and you can populate the *Pay Rate* and *Bill Rate* fields to change the percentage in the *GP %* field on the left.

*\*Note - When the GP % field is calculating the field will turn green.*

Once the rates are determined, update the **Order Details** form by entering the rates in the *Pay Rate* and *Bill Rate* fields.

