

Enterprise - Tips for Message Logging

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Tips for Message Logging

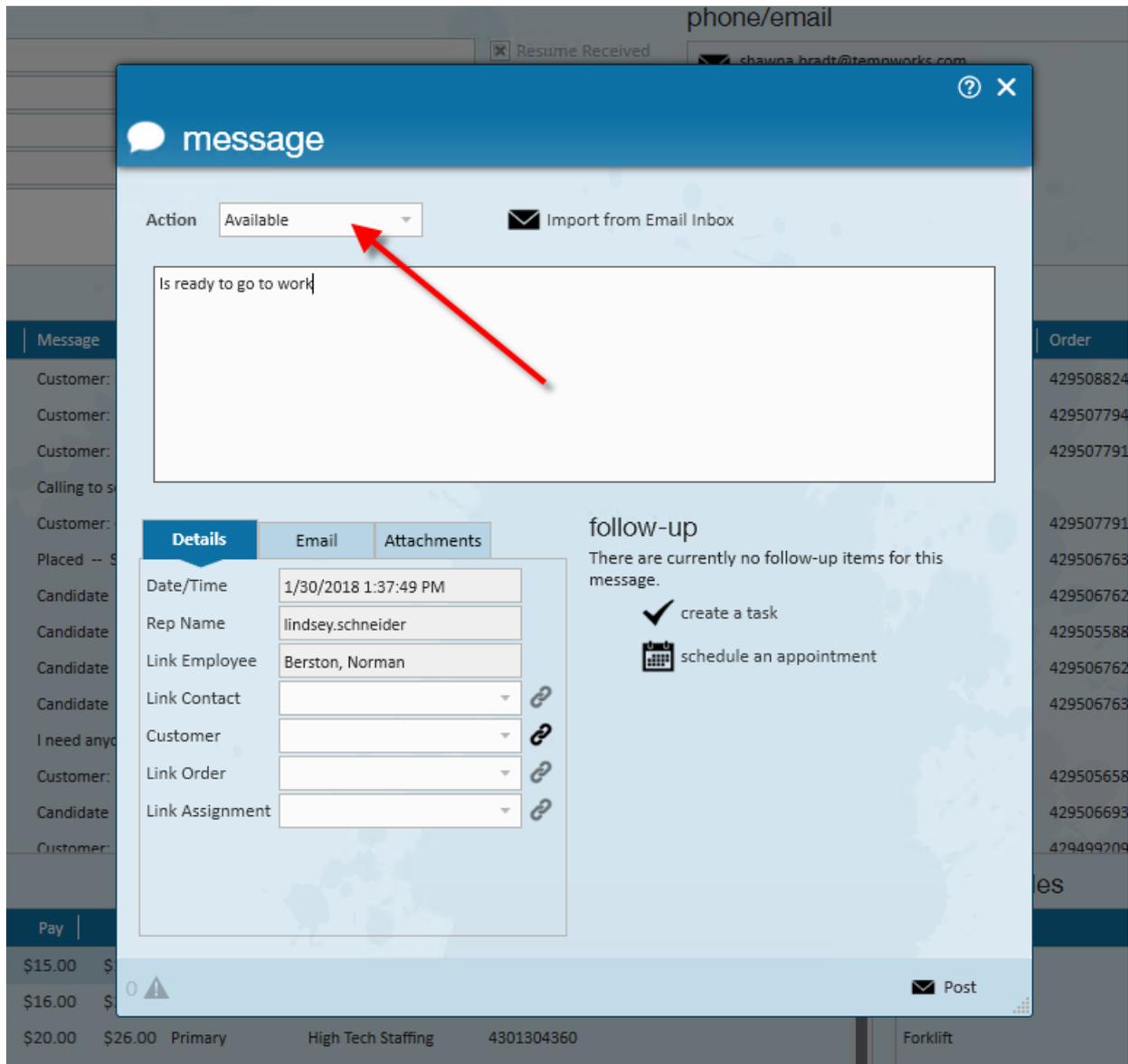
In the staffing world it can be hectic and at times overwhelming to keep track of what discussions and activity have happened with employees, customers, and even on an individual assignments. Enterprise allows users the ease and accessibility of logging messages on a given record and never having to miss a beat. Reports and searches can quickly be populated to create availability lists, categorize sales calls, and stay current on no show/no calls. Message logging has never been easier, giving you the advantage against competitors on keeping in the know.

How to log a message

The quickest way to log a message is navigating to the profile of whichever record you choose to record a message to. Once there, select the message bubble icon to open the message window as shown:

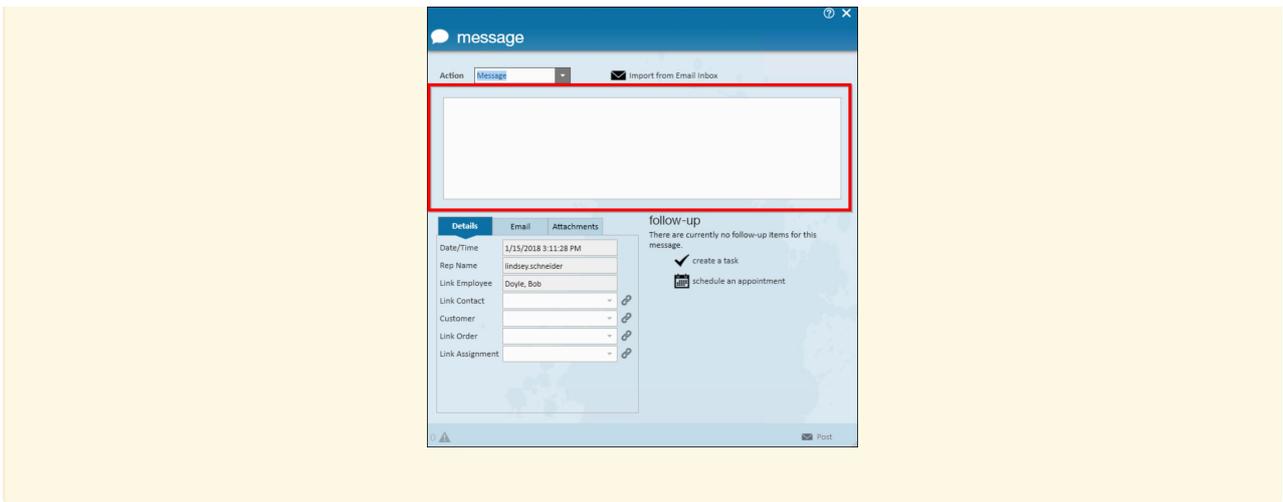
The screenshot displays the Enterprise software interface. At the top, it shows the user's name 'LINDSEY.SCHNEIDER: High Tech Staffing' and a notification icon. Below this, there's a status bar indicating 'No tasks to display for your current filter settings' and 'Currently viewing 0 of 1343 tasks. View mo...'. The main interface is divided into several sections. On the left, there's a sidebar with navigation options like 'tasks', 'appointments', 'social', and 'email'. The central area shows a 'phone/email' section with contact information: '(565) 989-3613', '(633) 214-4445', and '324-292-2929'. A red arrow points to a small message bubble icon in the bottom right corner of this section. In the foreground, a 'message' window is open, showing a form for logging a message. The form includes an 'Action' dropdown menu set to 'Message', an 'Import from Email Inbox' checkbox, and a large text area for the message content. Below the text area, there are tabs for 'Details', 'Email', and 'Attachments'. The 'Details' tab is active, showing fields for 'Date/Time' (1/15/2018 3:11:28 PM), 'Rep Name' (lindsey.schneider), 'Link Employee' (Doyle, Bob), 'Link Contact', 'Customer', 'Link Order', and 'Link Assignment'. To the right of the form, there's a 'follow-up' section with the text 'There are currently no follow-up items for this message.' and two options: 'create a task' and 'schedule an appointment'. At the bottom of the interface, there's a table with columns for 'Contact', 'Order', 'Complete', and 'Employee'. The table contains several rows of data, including 'Doyle, Bob' and 'Grande, Jesus (Ro...'. Below the table, there's an 'interest codes' section with a dropdown menu and a list of codes: 'WELDING', 'Guard', and 'Electrician'.

Select a message action code from the drop-down list and enter the details of the message itself. It is important to choose a message action code that closely relates to the reason of the message, in doing so, searching will be more effective:



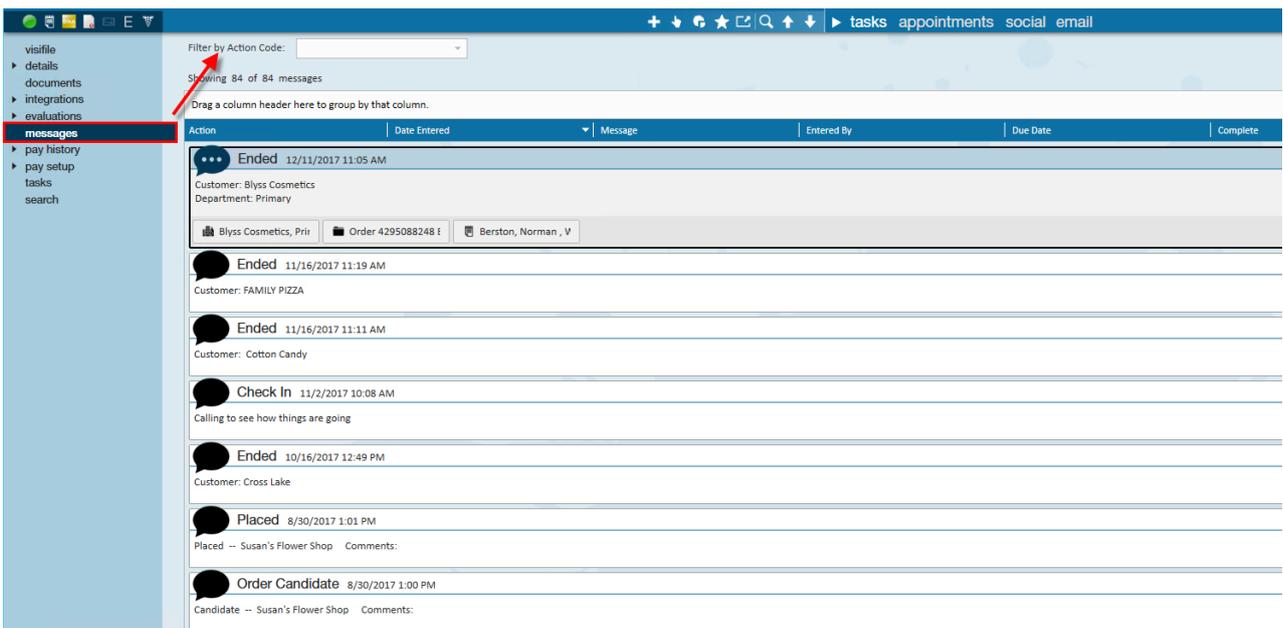
Note Message action codes may be added within the administration section of Enterprise.

Note Please limit message details to less than 1000 characters to avoid an error.



Although you may view message activity within the Visifile of the record itself this will show roughly 15 messages at a time. Within any record there is a section designated to viewing message history, here you may filter by specific action codes to review all message activity that has ever been logged on the record you are viewing.

Navigate to messages :



In the following example, the message action code of 'Ended' has been chosen:

Action	Date Entered	Message	Entered By
Ended	12/11/2017 11:05 AM	Customer: Blyss Cosmetics	
Ended	11/16/2017 11:19 AM	Customer: FAMILY PIZZA	
Ended	11/16/2017 11:11 AM	Customer: Cotton Candy	
Ended	10/16/2017 12:49 PM	Customer: Cross Lake	
Ended	6/16/2017 1:25 PM	Customer: Move Order Testing	
Ended	5/18/2017 4:50 PM	Customer: Jam Store	
Ended	5/10/2017 1:27 PM	Customer: John's Doughnuts	
Ended	3/7/2017 1:17 PM	Customer: Ministry of Magic	
Ended	3/7/2017 1:17 PM	Customer: Ministry of Magic	
Ended	3/6/2017 9:09 AM	Customer: Ministry of Magic	
Ended	3/6/2017 9:09 AM	Customer: Ministry of Magic	

Popular Message Action Codes

Employee

- **Available** - Log this message to indicate the employee is ready to go to work
- **Late**- Utilize this message to keep track of tardiness and attendance
- **Sick**- Utilize this message to track call outs
- **LVM**- A popular message to log when trying to get in touch with the candidate/employee
- **Interview**- Log this message to prepare the candidate interview
- **Pre-screened**- Utilize this message to follow your company pre-screening processes

Customer

- **Sales Call**- This message is helpful when clients are in a prospect status to track sales activity
- **SC Lunch/Meeting**- Log this message to indicate relationship building with the client
- **Treat drop**- Log this message if you have dropped off a business card, gear, etc. at a prospect client
- **Lead**- Utilize if you identify this client as becoming a potential customer
- **TC quality check** - Log this message if you have done a phone call with the client to check on the business and employees you are sending

Order

- **Facility visit-** Utilize this message if you are checking the quality of the onsite facility you are sending workers to
- **On-hold-** Log this message if the client calls in to hold off on the order recently placed
- **Order cancelled-** Log this message if the order is no longer relevant or needed for the client

Assignment

- **First day call-** This message is useful to ensure the employee has checked in to the job, has any outstanding questions about the position etc.
- **No show/ No call-** Log this message when employees do not show up for positions
- **Late-** Use this message action code if they are late to the job
- **Offered full time-** Log this message if the employee has gone from a temporary to full-time employee

NoteThese popular message action codes may vary from staffing company to staffing company. If you are unsure of what message action codes to utilize when please review your internal company processes.

Message linking

When logging a message you may utilize the linking system to tie a message from one record to another. For example, an employee may be coming in for an interview at a specific client, or they called in late for a job they are working on. Linking allows you to quickly tie these messages simultaneously to another record. Within the message, you may either select the link icon to link the message to a customer or order record you were most recently viewing. The second option would be to search for a customer, order, assignment etc. to link the message to.

Recently viewed linking

This option allows you to link a message directly to the last customer, order, assignment record you were viewing. For example, if you were looking at order number "4295066945" the system will automatically associate that order number with this message. Hover over the 'link' icon (chain link) to receive a reminder message that you are linking to the previously viewed record:

message

Action Interview Import from Email Inbox

Details | Email | Attachments

Date/Time: 1/30/2018 2:50:07 PM

Rep Name: lindsey.schneider

Link Employee: PEACH, JIM

Link Contact:

Customer: Stearns Trailer Link to last selected order

Link Order:

Link Assignment:

follow-up

There are currently no follow-up items for this message.

create a task

schedule an appointment

Post

Order "4295066945" preview:

Stearns Trailers, Primary Customer ID: 4294999757 Order ID: 4295066945

Welder 2 of 11 positions filled

tasks appointments social email

order snapshot

Customer Name	Stearns Trailers	Title	Welder	Pay Rate	\$27.77	Status
Department	Primary	Description		Bill Rate	\$39.16	Date Op
Order ID	4295066945	Branch	Memphis SE			Duration
Supervisor	Truman, Harry	Office Phone	453-986-1566			

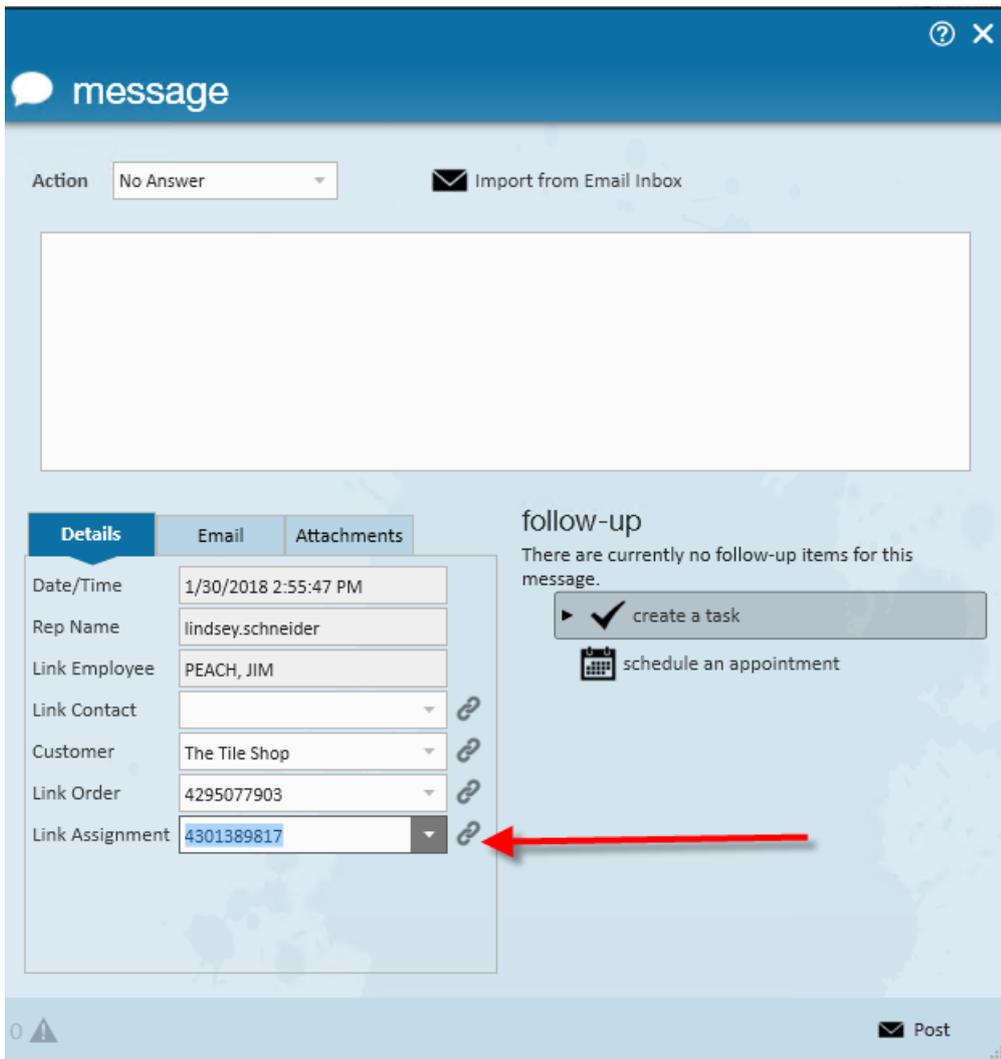
messages

Date	Action	Message	Rep	Contact	Customer	Due	Employee
1/30/2018	Interview	Jim is coming in for an interview	lindsey.schneider		Stearns Trille...		PEACH, JIM
8/21/2017	Customer Interview	Interview -- Stearns Trailers Comments:	lindsey.schneider	Truman, Harry (Stearns T...			Manalow, Barry
8/21/2017	Customer Interview	Interview -- Stearns Trailers Comments:	lindsey.schneider	Truman, Harry (Stearns T...			Dean, Lilly
8/21/2017	Customer Interview	Interview -- Stearns Trailers Comments:	lindsey.schneider	Truman, Harry (Stearns T...			Degeeset, Stephanie
7/25/2017	Placed	Placed -- Stearns Trailers Comments:	lindsey.schneider	Truman, Harry (Stearns T...			Dean, Lilly
7/14/2017	Customer Interview	Interview -- Stearns Trailers Comments:	lindsey.schneider	Truman, Harry (Stearns T...			Market, Theo
5/11/2017	Submitted	Submitted -- Stearns Trailers Comments:	lindsey.schneider	Truman, Harry (Stearns T...			Manalow, Barry
5/11/2017	Email	Hey can you look over this resume	lindsey.schneider	Notch, Diane (Stearns Tr...	Stearns Trille...		Manalow, Barry
5/11/2017	Order Candidate	Candidate -- Stearns Trailers Comments:	lindsey.schneider	Truman, Harry (Stearns T...			Market, Theo
5/11/2017	Order Candidate	Candidate -- Stearns Trailers Comments:	lindsey.schneider	Truman, Harry (Stearns T...			Manalow, Barry
5/11/2017	Order Candidate	Candidate -- Stearns Trailers Comments:	lindsey.schneider	Truman, Harry (Stearns T...			Dean, Lilly
5/11/2017	WCandidate	WCandidate -- Stearns Trailers Comments:	twapi-user	Truman, Harry (Stearns T...			Degeeset, Stephanie

Searching to Link:

You may also select a customer, order, or assignment to link a message to if desired. Simply input customer details, order id details, etc. or select from the drop-down to link the message to a certain record. In this example the

assignment id of 4301389817 was selected from the drop-down and linked to this message. The order and customer information will auto-populate in relation to assignment linked:



Logging Messages from Searches

There may be times when you need to reach a large audience and log a mass message. From the enhanced search section of Enterprise simply build the search criteria you are looking for, select all of the people you wish to send the message to. Within the search simply right-click to choose messages, select between default message action codes (1.) or log a message with a specified message action code (2.)

Your search returned 55 results.

Drag a column header here to group by that column.

ID	Last Name	First Name	Branch	Phone	Is Acti...	Is Assi...	Last Message	Zip C...	HasR...	Cell Phone
429497...	Accrue	Johnny	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55121	<input checked="" type="checkbox"/>	
429503...	Anderson	Paul	Hennepin East	(952) 555-7854	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ended	55105	<input type="checkbox"/>	
429500...	Arquette	Richmond	Memphis SE	(651) 486-2312	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ended	55107	<input type="checkbox"/>	
429501...	Berston	Norman	Memphis SE	(651) 430-5849	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ended	55109	<input checked="" type="checkbox"/>	
429500...	Colston	Sydney	Memphis SE	(763) 456-4312	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LMTC	55121	<input type="checkbox"/>	
429500...	Dell	Charlie	Memphis SE	(952) 489-7156	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55109	<input type="checkbox"/>	
429503...	Edison	Thomas	Memphis SE	(651) 500-9999	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ended	55121	<input type="checkbox"/>	
429501...	Evans	Burt	Memphis SE	(651) 112-1211	<input checked="" type="checkbox"/>	<input type="checkbox"/>	NSNC	55109	<input type="checkbox"/>	
429503...	Gentus	Dilon	Memphis SE	(651) 885-4455	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ended	55109	<input type="checkbox"/>	
429501...	Germain	Jason	Memphis SE	(651) 112-2154	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order Candidate	55109	<input checked="" type="checkbox"/>	
429501...	Glisp	Karen	Memphis SE	(651) 486-2312	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55109	<input type="checkbox"/>	
429501...	Green	Hector	Memphis SE	(651) 486-2312	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55109	<input checked="" type="checkbox"/>	
429500...	Grenier	Zach	Memphis SE	(651) 486-2312	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55119	<input type="checkbox"/>	
429501...	Haats	Anna	Memphis SE	(651) 486-2312	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55416	<input type="checkbox"/>	
429501...	Halifax	Thomas	Memphis SE	(651) 486-2312	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55413	<input checked="" type="checkbox"/>	
429503...	Hamilton	George	Memphis SE	(651) 888-1111	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55109	<input type="checkbox"/>	
429501...	Hennen	Frank	Memphis SE	(651) 546-5123	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55121	<input checked="" type="checkbox"/>	
429503...	Hill	Howard	Memphis SE	(651) 885-5555	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55109	<input type="checkbox"/>	
429503...	Hill	James	Memphis SE	(651) 885-5555	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55109	<input type="checkbox"/>	
429501...	Johannson	Annie	Memphis SE	(651) 128-0382	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55109	<input type="checkbox"/>	
429503...	Johnson	Gary	Hennepin East	(952) 555-6952	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55105	<input type="checkbox"/>	
429500...	Johnson	Terry	Memphis SE	(612) 454-8475	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Placed	55121	<input type="checkbox"/>	
429501...	Juniper	Wes	Memphis SE	(651) 211-1111	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Email	55109	<input type="checkbox"/>	
429507...	Kinder	Julia	Memphis SE	4 (567) 226-5...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unemployment G...	55416	<input checked="" type="checkbox"/>	
429501...	King	Linus	Memphis SE	(651) 455-8541	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55109	<input type="checkbox"/>	

If done correctly the following window will appear to alert you that the messages have been logged on said records:

column header here to group by that column.

Last Name	First Name	Branch	Phone	Is Acti...	Is Assi...	Last Message	Zip C...	HasR...	Cell Phone
Accrue	Johnny	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55121	<input checked="" type="checkbox"/>	
Anderson	Paul	Hennepin East	(952) 555-7854	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ended	55105	<input type="checkbox"/>	
Arquette	Richmond	Memphis SE	(651) 486-2312	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ended	55107	<input type="checkbox"/>	
Berston	Norman	Memphis SE	(651) 430-5849	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ended	55109	<input checked="" type="checkbox"/>	
Colston	Sydney	Memphis SE	(763) 456-4312	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LMTC	55121	<input type="checkbox"/>	
Dell	Charlie	Memphis SE	(952) 489-7156	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTC	55109	<input type="checkbox"/>	
Edison	Thomas	Memphis SE	(651) 500-9999	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ended			
Evans	Burt	Memphis SE	(651) 112-1211	<input checked="" type="checkbox"/>	<input type="checkbox"/>	NSNC			
Gentus	Dilon	Memphis SE	(651) 885-4455	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ended			
Germain	Jason	Memphis SE	(651) 112-2154	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order			
Glisp	Karen	Memphis SE	(651) 484-8444	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ended			
Green	Hector	Memphis SE	(651) 222-4545	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ended			
Grenier	Zach	Memphis SE	(651) 984-5213	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ended	55119	<input type="checkbox"/>	
Haats	Anna	Memphis SE	(453) 656-7893	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ended	55416	<input type="checkbox"/>	
Halifax	Thomas	Memphis SE	(248) 549-4984	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Refused	55413	<input checked="" type="checkbox"/>	
Hamilton	George	Memphis SE	(651) 888-1111	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ended	55109	<input type="checkbox"/>	
Hennen	Frank	Memphis SE	(651) 546-5123	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Submitted	55121	<input checked="" type="checkbox"/>	
Hill	Howard	Memphis SE	(651) 885-5555	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No Answer	55109	<input type="checkbox"/>	
Hill	James	Memphis SE	(651) 885-5555	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55109	<input type="checkbox"/>	
Johansson	Annie	Memphis SE	(651) 128-0382	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Offered	55109	<input type="checkbox"/>	
Johnson	Gary	Hennepin East	(952) 555-6952	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55105	<input type="checkbox"/>	

TempWorks Enterprise

 4 Messages logged

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