

# Enterprise - How to Assign an Employee to an Order

Last Modified on 04/10/2026 12:24 pm CDT

## Creating Assignments

Creating assignments for TempWorks orders provides many benefits. To list a few, the assignment creation enables timecards to be created, allows for tracking of staffing agencies' order fill rates and other related Key Performance Indicators, and provides helpful information to the employee regarding worksite location, pay rate and potential Supervisor contact information.

There are multiple ways to create the assignment in Enterprise™. The most efficient method will depend on where you are currently working in your system. The following will walk through a few of the different options available.

**This article covers:**

1. [Using the Assignment + Option](#)
2. [Using the Actions Menu](#)
3. [Assigning from the Candidate Worksheet](#)
4. [Email Assignment Confirmation](#)
5. [Email New Hire Packet](#)

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## Assignment + Option

This is the most common option for people based on their workflow. For most recruiters, it's typical to look for an order you need to fill and then find the best candidate for that order and assign them. That is exactly what you will be doing here. Check out [Assignments Part 1: The Basics](#) for a video overview.

1. Find the order you want to fill

**Mew Transportation, Primary**  
 Driver Helper  
 0 of 2 positions filled

Customer ID: 4295014971  
 Order ID: 4295091990  
 Branch: Eagan

No tasks to display for your current filter settings  
 Currently viewing 0 of 24447 tasks. View more...

tasks appointments social email

visifile

**details**

- adjustments
- attendance
- interest codes
- invoice recipients
- education
- po setup
- required documents
- vendors
- candidates
- documents
- integrations
- messages
- tasks
- search

employee  
 customer  
**order**  
 assignment  
 contact  
 pay / bill

**Order Details** Web Options ACA Surcharge

**customer information**

Customer ID: 4295014971 Work Site: Primary  
 Worker Comp: MN2242  
 Alt Order ID: Burden Burden 3%  
 Directions: Park in the side lot and stop at the front desk on your first day

**job information**

Required: 2 Assigned: 0  
 Order Type: TF Temp To Full-Time  
 Job Title: Driver Helper  
 Description: Delivering food product in Minneapolis/St. Paul

Dress Code  
 Safety Notes  
 Start Date: 1/15/2020  
 Duration: Indef  
 Est. End Date  
 Shift  
 Start Time: 7:00 AM End Time: 4:00 PM

**financial details**

Multiplier: 1.25 Pay Periods: 52  
 Bill Rate: \$21.25 Pay Rate: \$17.00  
 Unit Bill Rate: \$0.00 Unit Pay Rate: \$0.00  
 OT Factor: 1.5000 Other Agency Pay: \$0.00  
 Overtime Bill: \$31.88 Overtime Pay: \$25.50  
 Doubletime Bill: \$42.50 Doubletime Pay: \$34.00  
 Overtime Plan: PlanSTD GP Percent: 10.64%  
 Desired GM % GP Estimate: \$361.76

**contacts**

Name	Description	Office Phone
Mewhorter, Mike	Hiring Mgr	952-999-9999
Mewhorter, Mike	Report To	952-999-9999

**other information**

Status: Unfilled Taken By: mike.mewhor...  
 Sales Team: Default Branch: Eagan  
 Do Not Auto-Close TW Time Clock PeopleNet

2. Run an employee search to find the best qualified candidate

Last Name: SSN: Unassigned RepName: All Reps Document Text  
 First Name: ID: Active Branch: All Branc

Enhance Search Saved Searches

Your search returned 21 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 Ph...
429497...	Acosta	Quentin	Minneapolis		✕	☐	Order Candidate	55082	☐	(248) 3...
429501...	Ball	Monte	Minneapolis	(561) 321-5132	✕	☐	Order Candidate	55113	☐	
429501...	Brell	Iris	Minneapolis	(607) 881-8876	✕	☐	Accepted	14850	✕	
429503...	Chadbourne	Christine	Minneapolis	(414) 403-4843	✕	☐	Message	55123	✕	
429508...	Day	Sunshine	New Brighton		✕	☐	Ended	71250	☐	(318) 4...
429508...	Dettman	Harvey	New Brighton	(651) 651-6342	✕	☐		55106...	☐	
12467	Devereaux	Tammy	Minneapolis	(651) 555-1212	✕	☐	Ended	55121	✕	(651) 1...
429508...	Go	Min	Minneapolis	(904) 362-7959	✕	☐	DNA	34472	☐	

3. View the employee's record

Christine Chadbourn  
 123 Main Street  
 Eagan, MN 55123  
 ID: 4295038917  
 SSN: xxx-xx-8888  
 Branch: Minneapolis

No tasks to display for your current filter settings  
 Currently viewing 0 of 24447 tasks. View more...

tasks appointments social email

**visifile**

- details
- documents
- integrations
- evaluations
- messages
- pay history
- pay setup
- tasks
- search

**employee snapshot**

Name: Chadbourn, Christine  
 Email Address: CHADBOURN10@YAHOO.COM  
 Desired Location:  
 Hire Status: File Pending Rate Desired:  
 Notes:

Resume Received  
 19 On File  
 Active  
 Assigned  
 Electronic W-2

**phone/email**

CHADBOURN10@YAHOO.COM  
 (414) 403-4843

**messages**

Date	Action	Message	Rep	Contact
7/17/2017	Message	Left message.	claudette	
6/28/2017	Scheduled Interview	7/1 in-person interview	sarah.rodgy	
6/28/2017	1st Recruiting Call	LVM and sent e-mail regarding Knapp.	sarah.rodgy	

**employee**

- customer
- order
- assignment
- contact
- pay / bill
- calendar
- all options**

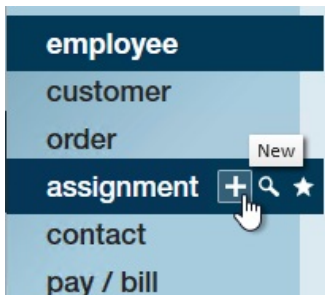
**assignments**

No Records Found

**interest codes**

- Code
- Drivers
- Management

4. Hover over assignment in the navigation tree and select the + button



5. Review that it is the correct order/employee

6. Select Save

**Christine Chadbourn**  
 123 Main Street  
 Eagan, MN 55123  
 ID: 4295038917  
 SSN: xxx-xx-8888  
 Branch: Minneapolis

Search for Employees, Customers, Orders, etc.

AMELIA.STOUT: High Tech Staffing

No tasks to display for your current filter settings  
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No Records Found

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- all options

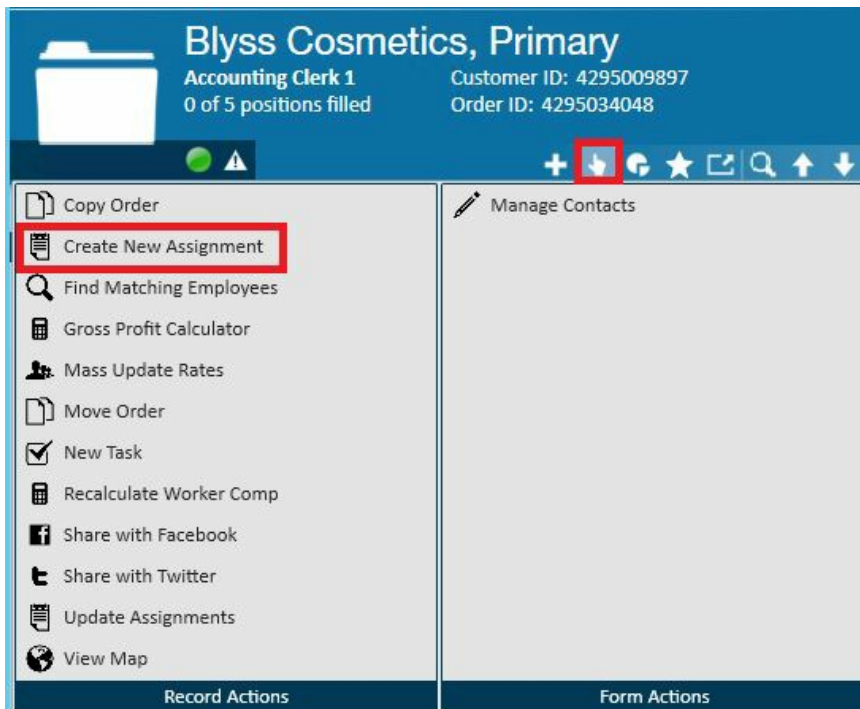
7. Review any potential Assignment Restrictions
8. If no hard stops appear you will be able to complete the assignment

## From the Actions Menu

### From the Order Record

This is a great option when you are on the order and know exactly who you are going to assign.

1. From anywhere on the order record, Select the Actions Menu
2. Choose Create New Assignment



### 3. Look up the employee to be assigned

- You can search by last name, first name, Aldent(ID number) or last 4 of their SSN

The screenshot shows the "add new assignment" form. The form has a blue header with the title "add new assignment" and a question mark icon. Below the header, there are four input fields: "Company" (Blyss Cosmetics), "Department" (Primary), "Job Title" (Accounting Clerk 1), and "Order ID" (4295034048). Below these fields, there is a section for filtering by employee. The text reads "Filter by Last Name, First Name, Aldent, or Last Four Digits of SSN below". There is a dropdown menu for "Employee" with the selected value "Anderson, Aly, 4295015433, XXX-XX-2234". There is also a date field for "Start Date" with the value "4/14/2015". At the bottom of the form, there are two buttons: "Save" and "Save and Close".

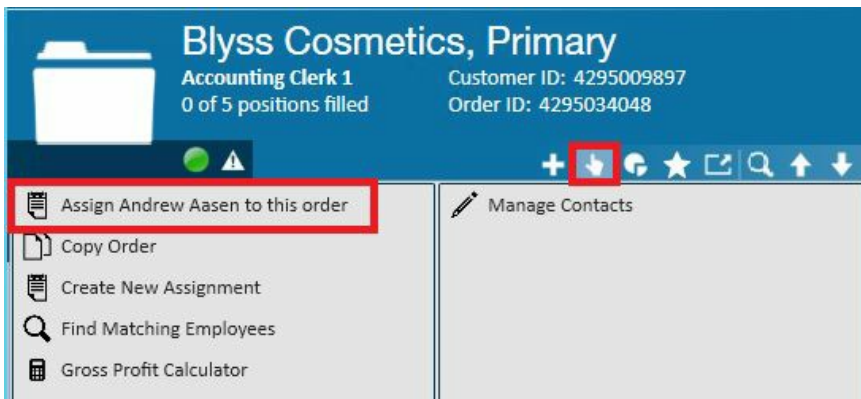
- Click the Advanced option (or Alt + 4 on your keyboard) when you open up the drop down for additional search options

### From the Employee or Order Record

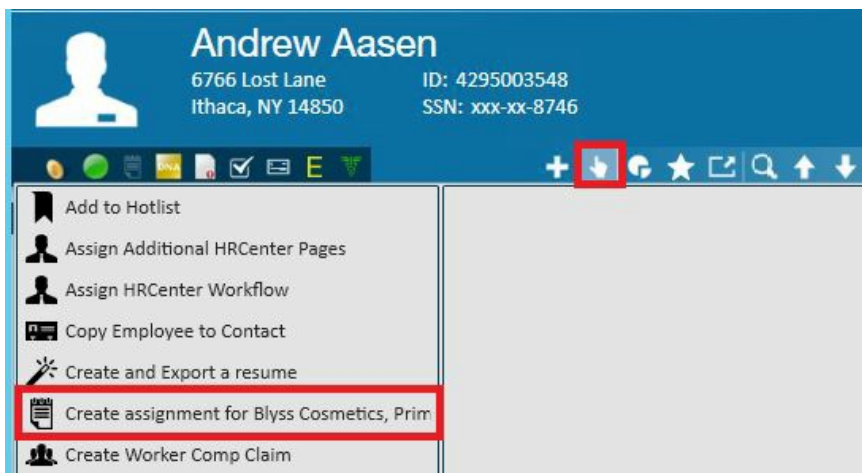
Use this option if you know who you want to assign and you just looked at their employee record in TempWorks Enterprise. An example would be: during your efforts to find someone to place on the order, your perfect candidate calls in. You navigate to that employee's record. Now, TempWorks knows the last person you viewed and the last order you viewed.

For this scenario, you have 2 options:

1. **Assign from the order:** From the order, select the actions button and select assign \*employee\* to this order. This will display the name of the last employee viewed in TempWorks:



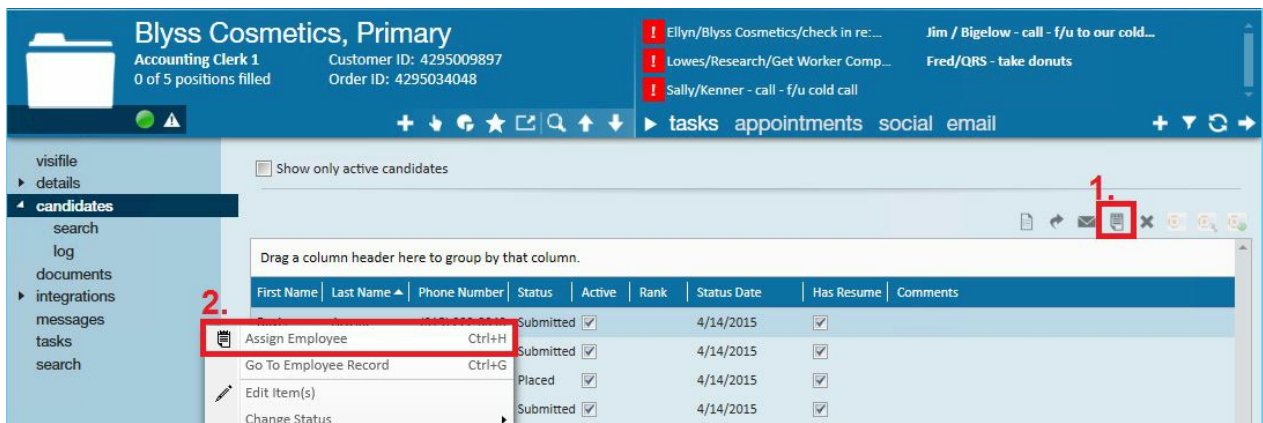
2. **Assign from the employee:** From the employee, select the actions button and select create assignment for \*customer name, department\* of the last order viewed in TempWorks:



## Assign from the Candidate Worksheet

The candidate worksheet allows you to put together a call list for the order you are working on. If you are using the candidate worksheet to manage your recruiting efforts, you can assign your employee from that worksheet. To learn more about the candidate worksheet, check out [Enterprise - How to Create and Manage the Candidate Worksheet](#).

Navigate to the order/candidate worksheet. There are 3 options from the candidate worksheet.



1. Click to highlight the candidate and assign by clicking the assign button (1.) in the upper right.
2. Right click on the candidate and select assign employee (2.).
3. Use the keyboard shortcut of ctrl+H

**\*Note\*** Using any of the methods from the candidate worksheet you can assign multiple Employees at the same time by using your shift or control key and clicking to highlight each employee you'd like to assign.

**\*Note\*** When assigning you may see assignment restrictions pop up if there is anything you should be aware of about the employee(s) you are assigning.

All assignments made for this order will be displayed on the visifile:

The screenshot shows the software interface for 'Blyss Cosmetics, Primary'. The top navigation bar includes 'tasks', 'appointments', 'social', and 'email'. The left sidebar contains 'visifile', 'employee', 'customer', 'order', 'assignment', 'contact', 'calendar', 'reports', and 'all options'. The main content area is divided into 'order snapshot', 'order status', 'messages', and 'assignments'.

**order snapshot**

Customer	Blyss Cosmetics	Title	Accounting Clerk 1	Pay Rate	\$10.00
Department	Primary	Description		Bill Rate	\$14.50
Order ID	4295034048	Branch	Memphis SE		
Supervisor	Becker, Bob	Office Phone	321-456-3455		

**order status**

Status	Unfilled
Date Opened	4/14/2015 2:19:00 PM
Duration	10 weeks

**messages**

Date	Action	Message	Rep	Contact
4/14/2015	Submitted	Submitted -- Blyss Cosmetics Comments:	dwood	Becker, Bol
4/14/2015	Submitted	Submitted -- Blyss Cosmetics Comments:	dwood	Becker, Bol
4/14/2015	Submitted	Submitted -- Blyss Cosmetics Comments:	dwood	Becker, Bol
4/14/2015	Submitted	Submitted -- Blyss Cosmetics Comments:	dwood	Becker, Bol
4/14/2015	Submitted	Submitted -- Blyss Cosmetics Comments:	dwood	Becker, Bol
4/14/2015	Submitted	Submitted -- Blyss Cosmetics Comments:	dwood	Becker, Bol

**assignments**

Employee	Perf Code	Description	Orig. Start	Start	End	Pay	Bill
Adams, Dianna	Open		4/14/2015	4/14/2015		\$10.00	\$14.50
Atkins, Henry L	Open		4/14/2015	4/14/2015		\$10.00	\$14.50

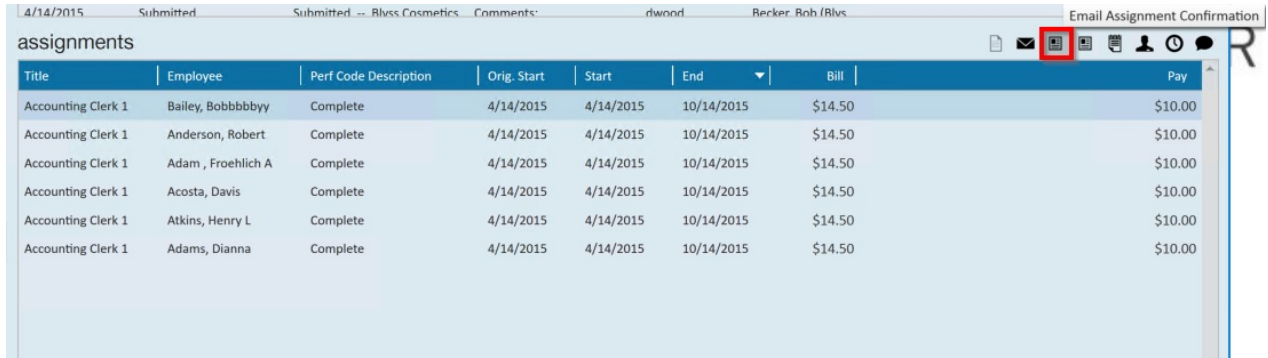
See [\\*Assignments Part 2: The Candidate Worksheet](#) for a video overview of this option and a quiz!

## Email Assignment Confirmation:

Using the Email Assignment Confirmation gives you the ability to quickly send important assignment details to the Supervisor listed on the order.

- 1) Navigate to the Order > Visifile
- 2) Select the assignment that you are sending the details of

3) Choose the highlighted icon below "Email Assignment Confirmation"



4) Now you have the option to choose which template you want to send. Common examples are: Job Details, Assignment Information or Confirmation, and Start Day Details.

**\*Note\*** To create a new template navigate to Template Manager: All Options > Email > Template Manager. If you do not see this option, talk with your administrator.

## Email New Hire Package

If you want to send a template New Hire Package to an employee on assignment you can quickly do that as well.

- 1) Navigate to Order > Visifile
- 2) Select the assignments
- 3) Choose the highlighted icon below "Email New Hire Package"



**\*Note\*** To create a new template navigate to Template Manager: All Options > Email > Template Manager. If you do not see this option, talk with your administrator.

## Related Articles