

Enterprise - Utilizing Master Orders

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What is a Master Order?

Master orders are ideal for customers who consistently request candidates for the same type of position. Inspired by a time in staffing where computers were not readily available, the master order allows your organization to quickly create records and focus on presenting candidates; they can be made to exact specifications and be copied over and over.

This Article Covers:

1. [Creating a Master Order](#)
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Creating a Master Order:

Step 1: Create an order that includes the consistently standard information the customer requests for this type of order. Things like worksite, job title, job description, safety notes, financial details, and notes should all be entered.

Note Information added within the PO setup and interest codes pages can also be added to the master order. This information will pull into orders when the master is copied.

Note Do not enter a start date on the master order as every time the order is copied, a new start date should be entered (we do not want the start date on the master to copy over into new orders). For this same reason, users may not want to enter shift information on the master order if all shifts are staffed.

Balloons Inc., Shipping
 Forklift
 0 of 1 positions filled
 Customer ID: 4295010373
 Order ID: 4295044588

! Natalie/BlyssMfh- visit - contract
 ! Dan/Cal/QC Call
 Personal Task

First Day Call
 Jim/Crom - call - peak season
 JillAbron - call re: move back to US

tasks appointments social email

Order Details | Web Options | ACA Surcharge

customer information
 Customer ID: 4295010373
 Worker Comp: 3119
 Alt Order ID:
 Directions: Take 35E south to Eden Prairie, take exit 7, go west about 1.5 miles. Huge building on the I

job information
 Required: 1 Assigned: 0
 Order Type: TE Temp
 Job Title: Forklift
 Description: Must have at least 5 years experience driving an electric forklift. Warehouse experience is a must. Assist the pack line when necessary.

financial details
 Multiplier: None
 Bill Rate: \$21.15
 Unit Bill Rate: \$0.00
 OT Factor: 1.5000
 Overtime Bill: \$31.73
 Doubletime Bill: \$42.30
 Overtime Plan: PlanSTD
 Desired GM %:
 Pay Periods: 52
 Pay Rate: \$15.00
 Unit Pay Rate: \$0.00
 Other Agency Pay: \$0.00
 Overtime Pay: \$22.50
 Doubletime Pay: \$30.00
 GP Percent: 21.96%
 GP Estimate: \$743.28

contacts

Name	Description	Office Phone
Jenson, John	Supervisor	854-485-3225

other information
 Status: Master
 Taken By: stephanie
 Sales Team: Default
 Branch: Memphis SE
 Do Not Auto-Close: TW Time Clock: PeopleNet:

Notes:

Sun Mon Tues Wed Thu Fri Sat

Step 2: Update the status to master.

Locating Master Orders

Once your master orders have been created you can search for them by conducting an order search, based on the order status of "master":

Customer: Filled: All Orders
 Order ID: Active: All Statuses
 RepName: All Reps
 Branch: All Branches
 Search Clear Criteria

Enhance Search | Saved Searches

Details
 Job Information
 Candidates
 Location
 Contacts
 Document
 Financial
 Custom Data

Filled
 Requisition Number
 Customer
 Department
 Order Status: Like Master Show in Results

+Add

The search will return all orders that have a status of "Master":

Your search returned 10 results.

Drag a column header here to group by that column.

Order...	Customer	Department	Job Title	Order...	Pay R...	Bill Ra...	Start Date	Order Status	Nu...	Nu...	Worksite
429504...	Green Thumb	Primary	Forklift	TE	\$11.00	\$14.41		Master	1	0	Primary
429504...	Yeti's Lab	Primary	Forklift	TE	\$9.00	\$13.50		Master	1	0	St. Paul
429504...	Balloons Inc.	Shipping	Forklift	TE	\$12.00	\$20.00	6/15/2015	Master	5	0	NE Worksite
429503...	Tile Manufacturing Co.	Primary	Forklift	TE	\$14.00	\$25.28	2/27/2015	Master	3	4	Eagan
429502...	Veridian Dynamics	Accounting Depa...	Accounting Clerk II	TE	\$15.00	\$21.15	9/16/2014	Master	3	1	Finance Building
429502...	Stearns Trailers	Shipping	Customer Service...	TE	\$18.00	\$23.40	6/19/2014	Master	3	1	Glove Shipping Dock
429501...	Rocky Road Ice Cream	Primary	Forklift	TE	\$12.00	\$16.00	6/13/2014	Master	3	0	Blueberry A
429501...	Aardvark Industries Inc	Accts Payable	Billing Specialist	TE	\$16.00	\$22.00	5/29/2014	Master	2	0	Packaging Site
429501...	Grey Matter Technolo...	Legal	Machinist	TE	\$14.00	\$20.30	5/12/2014	Master	1	0	River
429501...	Veridian Dynamics	Manufacturing	Machinist	TE	\$19.00	\$26.79	5/8/2014	Master	2	0	Primary

Note If your database has large number of master orders in the system, you can narrow the search results by entering a customer name as well.

Note If you plan on copying master orders frequently, the best practice is to add "master order" search to your saved searches for the convenience and speed of finding master orders.

Copying Master Orders

Once the master order has been identified, to copy it expand the actions menu and select to copy order:

Balloons Inc., Shipping
Forklift
0 of 5 positions filled
Customer ID: 4295010373
Order ID: 4295044272

Copy Order
Create New Assignment
Find Matching Employees

Add Message
Email Assigned

You will be asked to confirm that you wish to copy the master order:

TempWorks Enterprise



This will create a new copy of this order and navigate to it.

Would you like to continue?

→ Yes

→ No

Selecting yes will copy the order exactly except:

- The required number of the new order will default to 1
- The status of the new order will default to unfilled

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