Enterprise - Tips and Tricks to Save Clicks

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Enterprise Infinity Tips and Tricks To Save Clicks

As creatures of habit, we sometimes continue to do the same thing in the same way because we are "used to it". There may be an easier way to accomplish a goal but we are familiar with our "old ways" and are often too busy to take the time to learn something new. Work gets busy and we don't have time to "play around" with TempWorks Enterprise to learn little features that would make work so much easier.

"Tips and Tricks to Save Clicks" will cover some of the ways in which you may be able to shave precious seconds off different tasks that need to be performed each day.

Forward/Back:

At the top of TempWorks Enterprise, no matter where you go, the 'forward and back' icons are always visible:



Use them exactly the same way you would in an internet browser, click the left facing button to navigate back through forms you've opened in TempWorks and the right facing button to navigate forward through those forms.

Up/Down:

After conducting a search, double click to open the first record in your search result and go to the form you'd like to view within that record:

🧲 ← → ▼ 🏠 🖻	Search for Employee	es, Customers, Orders, etc. 🔍		ALEXANDER.S
John Bro 7534 Jonestown Elmwood, MN	DWN n Ave ID: 429: SSN:	No tasi	ks to display	for your current filter settin
🥏 🗒 🔤 E 🕷		_ + +	asks ap	opointments socia
 visifile details documents integrations evaluations messages pay history pay setup tasks 	employee si Name Email Address Desired Location Hire Status Notes	Brown, John Eligible for Hire Rate Desired		Resume Received 19 On File Active Assigned
search	messages			

Click the 'down' arrow to go to the next record in your search result list but stay on the same form within that record.

This is very useful if you want to do things like verify all direct deposit data has been entered for a list of employees. Or you may want to view everyone's education or interview notes without having to go back to your search results.

Note This feature is available in the employee, customer, order, assignment and contact areas of TempWorks Enterprise.

Recent Pages:

To view recently viewed pages click the down arrow in the upper left corner of TempWorks:

🕼 ← → 🔽 🏠 🗎	Search for Employe	ees, Customers, Orders,	, etc. 🔍		
L Machio, Ralph [Employee 429	95069363]				
💄 Vasco, Jackie [Employee 4295	5069261]				
L Crews, Terry [Employee 4295	038686]				
Reality Landscape, Landscape	e [Customer 42950131	24]			
Order 4295077998 Reality La	ndscape, Landscape [(Order 4295077998]			
Gary & Son Landscape, Prima	ary [Customer 429501]	2931]			
evaluations	Desired Location		,		
messages	Hire Status	Eligible and Active		Rate Desired	
pay history	Notes	Doesn't like animals*			
 pay setup tasks 					
search	messages				

This will display all records which you have viewed since last logging into Enterprise.

Note Once you have a list the length of your monitor, the older records will drop off the list.

Wildcards:

Use the wildcard (%) in your searches.

If you are looking for a company by the name of "tile", using the % before the word "tile" in a search will bring up companies that have the word "tile" somewhere within the name:

🕼 ← → ▼ 🏠 🗎	Search for	Employees, Customers, C	Orders, etc.	۹,			A	LEXANDE
Reality Lar 3432 Thompson Eagan, MN 551	ndscap ^{Dr} 121	e (Landscape ID: 4295013124 Parent ID : 4295013	e) 3122 6 ★ 🕑	Q. 🛧 🕴	! Lunch a	at Perelli s ap	s pointi	ments
visifile • details • defaults documents • integrations • invoice history • invoice setup	Customer ID Your se	%Tile	En 8 results	hance Searc	Active Departments	ş	RepN Brand	lame All ch All Searche
payment history	Custo	Customer Name	Departmen	t Na Branch	/	Active	Status	Phone
tasks search	429501	HTS Tile and Stone	Primary	Mempl	nis SE	×	A	051-45
	429501 429501	LVR Textiles Textiles Plus	Primary Primary	Mempl Mempl	nis SE nis SE	×	A H	651-55 651-77
employee	429496	The Tile Shop	Primary	Mempl	his SE	×	А	

The wildcard can be used for any unknown string of characters such as, in searching for an employee with the last name of Jablonski, if you know the name begins with a J and ends with ski, search using the wildcard by formatting it as: J%ski.

Note This works in free text search fields only.

Note When searching you will automatically get a wildcard at the end of what you are searching for. For instance: Searching for "Jab" will return results of anyone whose last name begins with "Jab".

Brackets:

When conducting a search you may want to limit your result by the first letter of the search result.

For instance, when sending an email to all active employees, your search results may return more than the maximum allowable results (typically the limit is 1,000). You may want to search for only employees whose last names start with A through M.

To do this use brackets to surround the first letters of the names you want returned:

Last Name	[a-m]	SSN	All Records
First Name		ID	Active

Right Click to Quick Log:

After conducting a search to find the Employee who has called in available:

Your s	Your search returned 547 results. 😔 🛎 🖼 🖲 🖡 🦉										
Drag a	Drag a column header here to group by that column.										
ID	Last Name	First Name	Branch	Pho	ne	Is Acti	ls Assi	Last Message	Zip C	HasR	Cell Phone
429501	. Billings	Jeremy	Memphis SW	(796	i) 555-1785	×		Ended	55124	-	· · · · ·
429500	. Bishop	Melanie	Memphis SE	(751	.) 459-5542	×		Ended	55416	×	(651) 895-4213
429501	. Black	Joe	Memphis SE	(310) 456-7896	×		Ended	92028		
429503	. Bob	Joe	Memphis SE			×		Email			(262) 111-1111
429500	. Bond	lamer Austickle	Memphic SE					Inded	55337		(258) 475-6985
429505	. Bonham	Available	to Call		and Email	_		vailable	60503		
429505	. BonJovi	Reactivate	to call		end Email t	0		nded	60586		
429506	. Воор	Deactivate		E s	end Text			wailable	31632		(229) 365-5252
429503	. BOOTER	Log Message		5	et As Order	Candida	te	mail	14564		
429503	. Botchi	Bruce	Memphis SE	F B	Preview Res	ume		wailable	28405		(919) 561-1438
429502	. Bradens	Anna	Memphis SE		Change ACA	Status		nded	55121		
429504	. Bradshaw	Luke	Memphis SE		Change ACA	Respons	e	мтс	55042	×	651651656
16133	Brandt	Paula	Memphis SE)	Add Selected	d to HotL	ist	nded			
12892	Branson	Kayla	Memphis SE	► 1	Navigate to			laced	14850		
429501	. Braue	Ann	Memphis SE	(321) 345-3455	×		Ended	32908		(321) 345-3455

Right click on the row which includes the Employee calling in available. Hover your mouse over Messages and select Available. This will log a Message that the Employee has called in Available.

This can also be used to log a message of Left Message to call, Reactivate, Deactivate.

Selecting Log Message will open the Message Dialog window.

Right Click Navigation:

After conducting a search from any of the main areas of TempWorks Enterprise (Employee, Customer, Order, Contact) right click on the row which includes the Employee you want to be working with. Hover your mouse over Navigate to:

4.04		105ultsi								
ACA	rou	p by that column.								
Activity fracker	t Nov	mo Pronch	Dhono	In Acti	le Acci	Last Mossage	Zin C	HacD	Coll Phone	
Assignment Restrictions	L INdi	ine branch	Phone	IS ACU	15 ASSI	Last Message	2ip C	nask	Cell Phone	
Contact Methods	emy	Memphis SW	(796) 555-1785	×		Ended	55124			
Candidacy	lanie	Memphis SE	(751) 459-5542	×		Ended	55416	×		(651) 895-4213
Direct Hire		Memphis 🗭	Messages			Ended	92028			
Education		Memphis	Send Email			Email				(262) 111-1111
Interpersonal	es.	Memohis	Send Email to			Ended	55337			(258) 475-6985
Interview Questionnaire		Mamphis	Send Text			Ausilable	60503			(230) 113 0303
Past Jobs	l n	wemphis	Set As Order Ca	ndidate		AvdildDie	00505			
Required Docs		Memphis	Preview Resum	e		Ended	60586			
Test Scores	۶V	Memphis	Change ACA Sta	tus		Available	31632			(229) 365-5252
Transportation	RY	Memphis	Change ACA Re	sponse		Email	14564			
Unemployment	re	Memphis	Add Selected to	HotList		Available	28405			(919) 561-1438
Work Experience		Visifile 🕨	Navigate to	-	+	Ended	55121			
Work Interests	1	Details		×		LMTC	55042	×		651651656
16133 Brandt	Pi	Documents	(765) 432-9273	×		Ended				
12892 Branson	Кі	Integrations	(321) 952-2421	×		Placed	14850			
429501 Braue	A	evaluations +	(321) 345-3455	×		Ended	32908			(321) 345-3455
429502 Braue	Ye	Messages	(324) 534-5666	×		Available	14850			
429501 Brell	D	Pay History	(607) 881-8876	×		React	14850	×		
429503 Brewster	н	Pay Setup		×		LMTC	55121	×		(651) 651-6565
420502 Bridges	D	Tasks	(470) 000 2222			INTC	20120			(770) 606 1574
429505 bridges	- T	Search	(470) 888-2323	~		LIVITC	50120			(770) 000-1374
429506 britches	WHISKEY	wiempnis av		×		Scheduled Intervi	55402			
429503 Brown	lohn	Memphis SF		¥		∆vailable	55122	¥		(294) 763-6545

Select the form within the employee record that you want to navigate to. An arrow to the right of the form name indicates there are sub-forms available.

This will navigate you directly to the form within the employee record

Right click to view resume:

After conducting a search for an employee from the employee or 'order candidate search' areas right click on the line which includes the employee whose resume you would like to see.

Select the 'Preview Resume' action.

Your search retui	rned 547 res	sults.		
Drag a column header h	nere to group by th	nat column.		
ID Last Name	First Name	Branch	Phone Is Acti Is Assi Last Message	Zip C HasR Cell
429501 Billings	Jeremy	Memphis SW	(796) 555-1785 💌 📃 Ended	55124
429500 Bishop	Melanie	Memphis SE	(7 Messages	55416
429501 Black	Joe	Memphis SE	(3 Send Email	92028
429503 Bob	Joe	Memphis SE	Send Email to	
429500 Bond	James	Memphis SE	(8 Send Text	55337
429505 Bonham	Jason	Memphis SE	Set As Order Candidate	60503
429505 BonJovi	John	Memphis C	Review Resume	60586
429506 Boop	Betty	Memphis SW	💱 Change ACA Status le	31632
429503 BOOTER	MARY	Memphis SE	(5 😻 Change ACA Response	14564
429503 Botchi	Bruce	Memphis SE	(9 📕 Add Selected to HotList le	28405
429502 Bradens	Anna	Memphis SE	(6 + Navigate to +	55121
429504 Bradshaw	Luke	Memphis SE	K LMTC	55042
16133 Brandt	Paula	Memphis SE	(765) 432-9273 💌 Ended	

This employee's resume will open:



Change and Rearrange Columns:

Any time a grid of information is displayed in TempWorks Enterprise, the columns can be rearranged as needed or desired.

Sort by Column:

Sort the grid based on any column by clicking on the header of the column by which you'd like to sort.

Drag a column header here to group by that column.											
ID Last Name	First Name	•	Branch	Phone	Is Acti	ls Assi	Last Message	Zip C	HasR	Cell Phone	
429500 Bishop	Melanie		Memphis SE	(751) 459-5542	×		Ended	55416	×		(651) 895-4213
429503 Baldino	Megan		Memphis SE	(585) 256-4630	×		Ended	14614	\geq		
429503 Winderson	Max		Memphis SE	(653) 545-5566	×		Ended	55416			
429503 Kontorosvsky	Max		Memphis SE		×		DNA	30101			(404) 863-8399
429505 Crossman	Matthew		Memphis SW		×		React	54901	×		
429505 Stien	Matt		Memphis SW	(651) 651-6565	×		Ended	55042	×		

'Click' once to sort in ascending order.

'Click' again to sort in descending order.

'Click' a third time to sort in original order.

Rearrange the Column Order:

By dragging and dropping the column header to where you want it to be you can rearrange any column. Drop the column header directly into the header bar.

	Your s	earch return	ed 547 res	ults.							. •	≤ 💿
	Drag a c	olumn header here	e to group by th	st Message								
L	ID	Last Name	First Name	- Janch	Phone	Is Acti	ls Assi	Last Message	Zip C	HasR	Cell Phone	
	429503	Ghandi	Mohatma	Memphis SE		×		Available	27617			
	429500	Morrison	Miranda	Memphis SE	(987) 555-1321	×		Email	55306	×		(651) 55
	429505	Harris	Miles	Memphis SE		×		Not Available	60617			
	429503	Schabow	Mike	Memphis SE	(888) 555-5555	×		Ended	27511			
	429504	Wagener	Mike	Memphis SE	(558) 558-5454	×		Ended	55044			(558) 47
	429503	Shaw	Mike	Memphis SE	(404) 889-2514	×		Available	30092			

Group data by any column:

Group data by dragging and dropping the column header(s) to the area just above the headers:

Ha	sResume	Branch	+								
	ID	Last Name	First Name	Granch	Phone	ls Acti	ls Assi	Last Message	Zip C	nasR	Cell Phone
🗆 Ha	asResume:	True (130 items)	1								
E	Branch: N	1emphis NE (11 iter	ms)								/
	5508	Johnson	Tabitha	Memphis NE	(651) 350-93	×		Ended	55109	×	
	5101	Farmer	Steve	Memphis NE	(651) 286-82	×		Email	3498	×	
	12492	Greene	Stephanie	Memphis NE	(651) 871-18	×		Order Candidate	43220	×	
	429501	Beach	Sandy	Memphis NE	(336) 757-0399	×		Ended	55121	×	
	5635	Lawson	Ronald	Memphis NE	(651) 080-90	×		Ended	55121	×	(651) 987-3981
	16472	Ingram	Kathy	Memphis NE	(419) 555-0237	×		Placed	60684	×	
	16510	Albin	Jamie	Memphis NE	(410) 877-8142	×		LMTC	43078	×	
	5282	Sanders	James	Memphis NE	(651) 427-84	×		Message	48823	×	
	16469	McMinn	James	Memphis NE	(817) 555-1301	×		Ended	14850	×	
	12232	Peterson	Fran	Memphis NE	(651) 370-8370	×		Ended	55121	×	
	429503	Jackson	Cherie	Memphis NE	(651) 555-5555	×		Available	55318	×	
E	Branch: N	lemphis SE (94 iten	ns)								
—	429501	Moore	William	Memphis SE		×		Order Candidate	14850	×	1.1
	420407	1	All	Manaphie CC	10071-001-0070			E	14050		

Once the grid is grouped click on any column Header to sort by that column.

To ungroup simply drag and drop the column headers back into the column header row.

Include or Exclude Columns:

Right click on the column header row to select or deselect columns.

Any column which has a check mark in front of it is currently displayed in the grid.

To hide a column click to remove the check mark.

To unhide a column click to add the check mark.

Customize navigation tree options:

When working in TempWorks Enterprise there is always a main Navigational Tree in the lower left corner of your screen.

employee
customer
order
assignment
contact
pay / bill
reports
all options

The options displayed here can be changed. Navigate to the 'E' Button in the upper left corner of TempWorks Enterprise then select 'Options'.



Within Options select Navigation.

From the Select a Group section, click to highlight a group. The forms which will appear in the main Navigational Tree will be selected. This is indicated by an x in the box proceeding the form names:

() options		
Appearance User Settings	select a group:	Select which forms you want to appear in your primary navigation list:
Navigation		X Employee
Email	AJ - Sales	X Customer
Mass Mailer	Payroll	X Order
	Al Service Ren	X Assignment
Dashboard	Sales	X Contact
Default Printer	AJ Pavroll	Dispatcher
		Pay / Bill
		Calendar
		Reports
		Applicant
		Email
		HrCenter
		🗙 Task Manager
		Rate Sheet
		Resume Parser
		Job Candidates
		Contact Messages
		Contact Groups
		Paycards
		Vendors
		Administration
		Attendance
		Hot Lists
		WebVisit
		Evaluations
		Integrations
		Worker Comp
		ACA
		Broadbean

Select the group you would prefer then click 'Save'.

Your navigational tree will now display only the forms for the group you've selected. If your SecRole permits you can create new groups by clicking the '+' icon.

Log Message on an Assignment:

If a message needs to be linked to an assignment (meaning it should show up on the assignment/order/contact/customer/employee) instead of starting the message from the assignment area, it can be added directly from the employee's visifile.

Look up the employee for whom the message needs to be logged. From the visifile, click to highlight the assignment you'd like to link the message to. Click on the 'message bubble' icon in the upper right of the 'visifile/assignments' area:

assignments	;								Į.	i 🖬 🛈 🗩
Customer	Title	Code	Start	End	Bill	Pay	Dept	Orde	Assign	Shift
Reagans Autobody	Material Handler	Open	10/31/2017		\$23.80	\$17.00	Primary	42950	430139	Graveyard
Real Steel	Bar Staff	EX	9/28/2017	11/7/2017	\$23.10	\$14.00	Primary	42950	430139	Graveyard
Real Steel	Drivers	RC	10/23/2017	10/30/2	\$30.45	\$21.00	shippi	42950	430138	Morning
Reality Landscape	Gardener	CE	10/11/2017	10/18/2	\$23.20	\$16.00	Lands	42950	430139	1st shift
Real Steel	Drivers	RL	10/1/2017	10/18/2	\$34.80	\$24.00	shippi	42950	430138	Morning

The message dialog box will open and the employee, customer, order and assignment will automatically be linked to the message.

Clicking the 'Link Contact' drop-down will display all contacts affiliated with this customer/department including their phone numbers. Select the contact to which this message should be linked:

🗩 messa	age				⊘ ×
Action Messag	;e	*	M Im	port from Email Inbox	
		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		follow-up	
Details	Email	Attachments		There are currently no follow-up items for	this
Date/Time	11/15/2017	1:13:07 PM		message.	
Rep Name	alexander.sv	/anson		create a task	
Link Employee	Machio, Ralp	bh	~ <i>0</i>	schedule an appointment	
Link Contact			- 2		
Customer	Reagans Aut	obody			
Link Order	4295078090	l	_		
Link Assignment	4301390275				
0 🛦					▶ Post

#### Import:

When logging a Message on a record in TempWorks, if an incoming email is in your email you will be able to import that email into the Message:



Click 'Import From Email Inbox' and the email subject lines from your inbox will be displayed. Select the email to import to this message. The verbiage can be modified prior to saving the message.

#### Email from a Message:

When logging a message, what you key in as the message text can be sent out as an email:

Type into the message the information you want sent via email.

Details Em	ail Attachments	follow-up There are currently no follow-up items for this message.
2. Subject: Check in Recipients Memphis SE <> Ralph Machio <r.w All Order Contacts All Cust. Contacts Other: 5.</r.w 	3. Iachio@xip.xom> 4. John Reagan (Hiring Mgr)	✓ create a task im schedule an appointment
A		M Post

Click the Email tab within the message (1.). Click to place an x into the box in front of Send This Message As An Email (2.).

Select recipients by placing an x in front of:

- (3.) The email address associates with your branch.
- (4.) The person who is affiliated with the record for which you are logging the message.
- (5.) Any additional recipients

Click the 'Post' icon to save the message and send it as an email.

#### Message Attachments:

When logging a message (and sending an email via logging a message), a document can be attached to the message.



A message which has a resume attached will display a paperclip icon when viewing the messages from the Visifile:

messages					
Date	<b>_</b>	Action		Message	
6/23/2015	Ø	ResumeSent		Resume received	

Attaching a document to a message will also display that document in the Employee/Document area.

#### Message Record Links:

Messages can be manually linked to the records which are currently open in Enterprise:

Details	Email	Attachments		
Date/Time	5/30/2013 2::	.7:38 PM		
Rep Name	dwood			
Link Employee	Ferris, Kim			
Link Contact	Billings, Barba	ra	Ŧ	ð
Customer	Crom Equipm	ent	Ŧ	ð
Link Order	38810		Ŧ	ð
Link Assignment	4301251728		Ŧ	ð

When logging a Message, if the message should be linked to other records click on the corresponding 'link' icon. This will link the message to the Contact, Customer, Order, Assignment or Employee whose record is currently open in that area of Enterprise.

*Note* this will work only if the record is currently OPEN in TempWorks Enterprise.

#### End Assignments en-mass:

From the 'order actions' menu click 'Update Assignments' to end any or all of the assignments affiliated with this Order:



This will display the list of assignments affiliated with this order:

ı ا	update assi	anments				® ×
<ul> <li>✓ Ma</li> <li>✓ Des</li> </ul>	ss Update Options elect All Assignments					
Up	Name	▲ Start Date	Performance Co	Message Action	Perf Note	End Date Est. End Date
×	Accrue, Jackie L	10/5/2017	• Fair 👻	Ended	Did well but needed to be more prompt.	3. 11/15/201; 🔳 🔳
×	Accrue, Jackie L	12/1/2017	Open	Ended		
×	Allister, Adam	10/5/2017	Open	Ended		
×	Arkansas, Frank	10/5/2017	Excellent	Ended	Allstar worker	11/15/2017 12:
×	Bauer, Jack	10/5/2017	Open	Ended		
1						
0						🗙 Cancel 📑 Save

Select any or all assignment by clicking to place an x in front of the assignment. Indicate the 'Performance Code' (1.) and enter a 'Performance Note' (2.), if desired. Enter the 'End Date' (3.) for any (or all) assignments which are ending. These can be different dates. Select if an employee should be DNA'd from this customer.

*Note* This will DNA the Employee from only the department for the customer. Should an employee be DNA'd from the entire customer, navigate to the customer record and set the assignment restriction.

#### Favorites:

Make records (or forms within those records) your favorites. This will enable very easy access to those records/forms. Look up the record and navigate to the specific form you'd like easy access to, this can be an employee, customer, order, assignment or contact. Click the 'star' icon:

Then click the '+' icon:

• •	• 🔶 🔻 🕋 📑 Search	for Employees, Customers, Orders, etc. 🔍			
2	Ralph Machic 222 Truman Way Eagan, MN 55121	ID: 4295069363 SSN: xxx-xx-1554			
) 🕘	) 🗒 🚾 🗹 🖘 E 🟋		+ +	G 🛧 🗹 🖸	<b>\ + +</b>
1	Crews, Terry (4295038686) Employee / Visifile	Vasco, Jackie (4295069261) Employee / Details			+ ×
1	Machio, Ralph (4295069363) Employee / Visifile	White, Walter (4295038431) Employee / Details			
1	Manalow, Barry (4295038593) Employee / Visifile				
		Favorites			

This form of this record will now be accessible by clicking on the Star button either in the Avatar area of the type of record you'd like to view favorites (Employee, Customer, Order, Assignment or Contact) or from the navigational tree:



To remove this record from your favorites list click on either Star button then click the "x" next to the record to be removed from favorites:



#### Hot Keys:

There are a multitude of keyboard shortcuts (or hot keys) built into TempWorks Enterprise. If you are more of a "keyboard" person, this will help you navigate more quickly through TempWorks Enterprise. To view the list of hot keys click on the 'E' Menu at the top of your TempWorks Enterprise:



And select keyboard shortcuts:

## *i* keyboard shortcuts

	APPLICATION
F1 Ctrl + S F5 Alt + B	Help Save Record Refresh Switch Branch
	NAVIGATION
Alt + Home F2 Ctrl + 2 F3 Ctrl + 3 F4	Home Customer Dashboard Customer Dashboard Order Dashboard Order Dashboard Assignment Dashboard
Ctrl + 4 F6 Ctrl + 1 Ctrl + 5	Assignment Dashboard Employee Dashboard Employee Dashboard Contact Dashboard Rack Office Dashboard
Ait + T Ait + I Ait + F12 Ait + R Shift + Ait + 1 Shift + Ait + R	Back Office Dashboard Time Entry Dashboard Calendar Reports Resume Parser Resume Parser
A	× Close

#### RECORD Back Alt + Left Arrow Alt + Right Arrow Forward Alt + 1 Add Employee Add Customer Alt + 2 Alt + 3 Add Order Add Assignment Alt+4 Alt + 5 Add Contact Alt + 6 Add Message 0 X Close

<u>Additional Keyboard Shortcuts</u>:Control + A Select AllControl + G Navigate to specific Record from a Search result+ (keypad) Lookup by Employee name within Time Entry^{*} (keypad) Lookup by Customer lookup within Time EntryAlt + C CopyAlt + L Link Timecard*Alt + U Unlink Timecard*

#### ② ×

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