

Enterprise - How to Manage Interest Codes on the Customer

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What Are Interest Codes?

Interest codes allow you to tag customer (and contact) records with different interests and requirements. Interest codes are searchable and reportable and only take seconds to add to a record so they can be extremely powerful for categorizing, sales tracking, and managing customer requirements for employees.

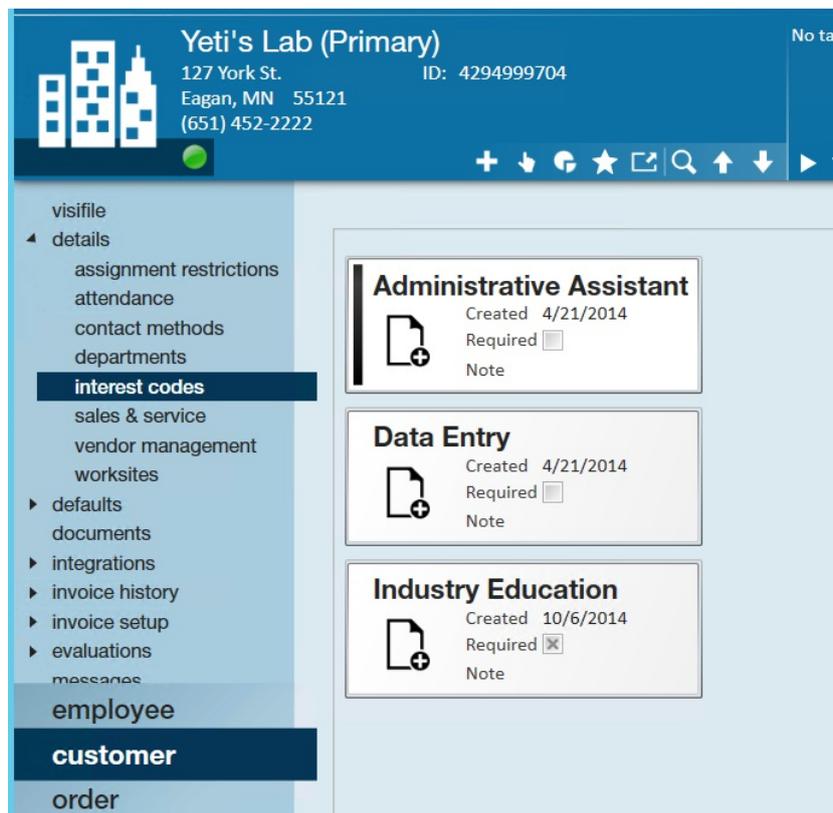
This Article Covers:

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Managing Interest Codes

How to Add Interest Codes to a Customer Record:

Step 1: Begin by navigating to the interest codes page within the details section of the customer record:



Step 2: Select the pencil icon to open the "manage interest codes" window.

Users may select a category from the related drop-down menu to filter the list of available interest codes, or simply enter the first few letters of the code within the *filter list* field to narrow down the search results.

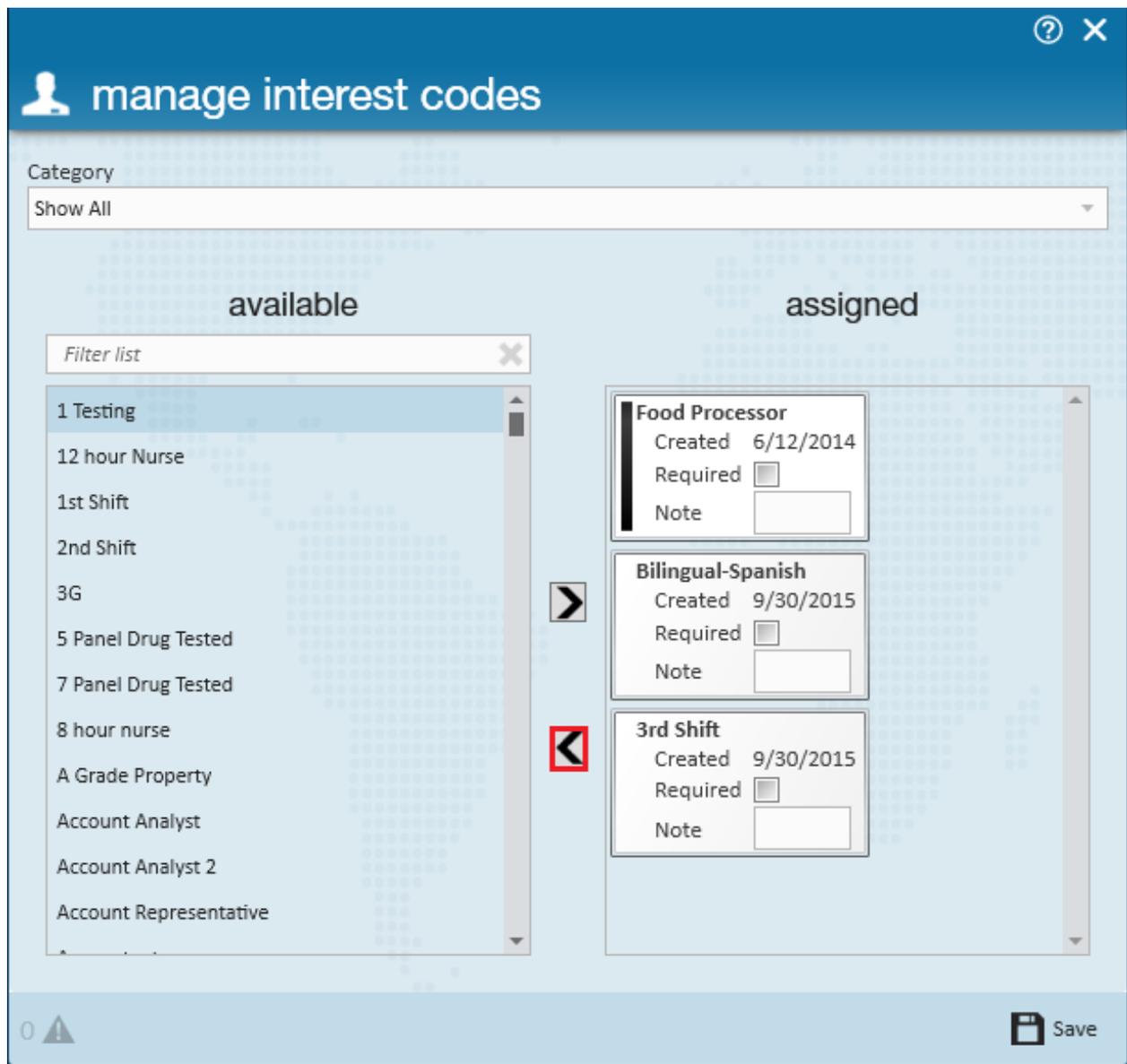
Note Interest codes are managed (created, deactivated, etc.) from the administration module of Enterprise

Step 3: From the available list of codes, select the skills, languages, shifts, etc, that the customer prefers or requires assigned employees to have. Selecting the > icon will move codes from the available to the assigned column. When you are finished making your selecting, click save.

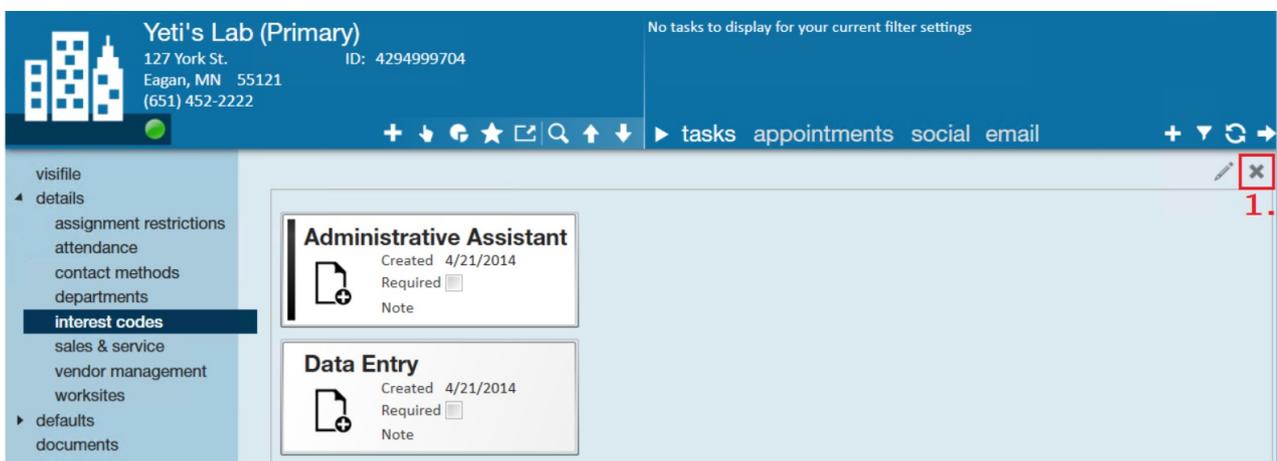
How to Remove Interest Codes from a Customer Record:

Option 1: Within the "manage interest codes" window highlight the code (represented by a black bar) and select the < icon to move an assigned code back to the available column.

Note If you wish to remove more than one code at a time utilize the ctrl key and select all codes you want to remove.



Option 2: Once interest codes have been added to a customer record and you wish to remove them, you can do so by selecting the x icon.



Customer & Order Interest Codes

Interest codes flow down: By default, interest codes entered at the customer record will automatically populate into the interest code page for all orders tied to that customer and subsequent departments.

Additional edits and changes can be made within the order itself:

The screenshot displays a software interface for a customer record. The header bar is blue and contains the following information: a folder icon, the customer name 'Yeti's Lab, Primary', the status 'Unknown', and '0 of 1 positions filled'. To the right, it shows 'Customer ID: 4294999704' and 'Order ID: 4295067199'. A notification area on the right says 'No tasks to display for your current filter settings'. Below the header is a navigation bar with icons for '+', a left arrow, a refresh icon, a star, a document icon, a magnifying glass, an up arrow, and a down arrow. To the right of these icons are tabs for 'tasks', 'appointments', 'social', and 'email'. A left sidebar menu lists various categories: 'visifile', 'details', 'adjustments', 'attendance', 'interest codes' (highlighted), 'invoice recipients', 'po setup', 'required documents', 'vendors', 'candidates', 'documents', 'integrations', 'messages', 'tasks', and 'search'. The main content area is titled 'interest codes' and has a 'Detailed View' dropdown. It contains three interest code entries, each with a document icon and a plus sign:

- Administrative Assistant**
Created: 5/23/2017
Required:
Note
- Data Entry**
Created: 5/23/2017
Required:
Note
- Industry Education**
Created: 5/23/2017
Required:
Note

Interest codes can be used as a matching tool: Within the order, expand the actions menu to utilize the find matching employees functionality. This will allow users to search on employee records that have matching interest codes tied to the order.

Yeti's Lab, Primary
Unknown Customer ID: 4294999704
 0 of 1 positions filled Order ID: 4295067199

Assign Keith Olson to this order
 Copy Order
 Create New Assignment
Find Matching Employees
 Gross Profit Calculator
 Make Keith Olson a candidate on this order
 Mass Update Rates
 Move Order
 New Task
 Recalculate Worker Comp
 Share with Twitter
 Update Assignments

Record Actions Form Actions

Interest codes can warn you when an employee may not be qualified: If you check the required checkbox on the interest code, it will require the employee to also have the same interest code. Any interest codes that are flagged as required will prompt a "soft stop" (*i* icon) assignment restriction when attempting to assign an employee that has not been tagged with the related interest code:

interest codes Detailed View

Administrative Assistant
 Created: 5/23/2017
 Required:
 Note

Data Entry
 Created: 5/23/2017
 Required:
 Note

Industry Education
 Created: 5/23/2017
 Required:
 Note

assignment restrictions

One or more assignments were not created due to assignment restrictions. (Click Here to View Instructions)

1 assignment not created

Olson, Keith Approve this assignment

- i* Employee is missing documents that are required on this order. View Order
- i* Employee is missing documents that are required on this order. View Order
- i* The employee is missing the following interest code: Industry Education View Employee
- i* Employee I9 has not been received. View Employee
- i* Employee is missing ACA Hire Date View Employee

approval summary
 Approvals: 0
 Allowed approvals: 1
 Unallowed approvals: 0

Approve all allowed assignments

Cancel Make assignment

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