Enterprise - Commonly Asked Questions - Customer Record

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Q: A Customer has requested that an Employee does not return. Where do I track this?

A: Expand the details section of the Customer record and select assignment restrictions. Click the + icon and select the Employee from the drop down menu. Creating Assignment restrictions will log a message on the Customer and Employee record. Add a description as to why the Employee is not to return to the company, this will also be logged within the message details area. If the Employee is not to return to any departments tied to the Customer select the DNA option, select Save.

Q: Am I able to Email Invoices to a Customer?

A: Individual Invoices can be emailed by navigating to invoice setup, billing setup on a Customer record. Within the Invoice Method drop down, select an Email options and add an Invoice Recipient to ensure proper delivery. *Note- To utilize this functionality you must have a mass mailer account setup within the options section of the E-menu.

Q: Why aren't all of the contacts and messages displayed on the Visifile?

A: If the Customer has department records, click Master View to the right of Customer Tree to display all Contacts, Financials, and Messages for all departments records under it. If you would like to only see the Contacts, Financials and Messages for the department record you are currently viewing, click Account View to the right of Customer Tree on the Visifile.

Q: How do I view all of the Employees currently assigned to the Customer?

A: Within the Customer, or one of its department's records, open the Actions Menu and select the View Active Assignments option; the Assignment Search area will open, displaying all of the open Assignments for the Customer. To view all related Assignments for a Customer, regardless of whether or not they're active or closed, select the View Assignments option. Sort the list by the End Date column to clarify who is still working, versus those who have ended their position.

Q: Where do I enter a negotiated mark up for a Customer?

A: Initial setup of the mark up must be added within the Multiplier Code table under the Administration section. This should be handled by the system administrator within the office. Once this is completed, open the Customer defaults area and select the + icon to add a new Multiplier Code. Select the Multiplier Code(s) from the drop menu, enter a priority in which takes precedence over the other, click Save. This code will now be available in the Order and Assignment record under the Multiplier drop down menu.

Q: What information needs to be completed on the Customer record before Orders can be created?

A: All of the necessary information needed to create an Order is collected when a Customer is first entered into Enterprise. Additional information such as worksites, Contacts, Departments, Defaults, and Interest Codes added will populate into the proper fields within the Order.

Q: Do we need to create a separate worksite for each location we send an Employee to?

A: Yes. The worksite is the physical location where you will be sending to the Employee to work. This is also where the Employee's Income taxes are based off of as well as their home address. The worksite must be selected correctly on the Order to make sure that payroll and invoicing are processed correctly.

Q: The Customer requests to have the Invoice sub-totaled by department, how is this set up?

A: Ensure Customer records have been created and, if they don't already exist, make new Orders/Assignments under their respective departments. Expand the invoice setup section and select billing setup. On the Invoice billing setup section you will need to select the Invoice Style that is sub-totaled by Department; this could be either the S or T type depending on the custom Invoice style created.*Note- Please contact TempWorks to add custom Invoices for your Customers.

Q: How do I view the Order history for the Customer?

A: Within the Customer, or one of its department records, select the Actions menu to display the View Orders option; this will open the search area and display order history for the Customer and/or Department. The results can be organized by start dates, pay rates, order status etc. using the search functionality.

Q: When should I use the Create Separate Invoices for Each section?

A: Utilize this option to determine how Customer Invoices should be separated. Whether you decide to break Invoices out by department, Order, Assignment, worksite etc., this option must be setup prior to the beginning of the Invoice run. When Invoices are processed, TempWorks will automatically separate them based on the selected criteria. If all the transactions for the Customer should be included on a single Invoice, the separating criteria should not need to be selected.*Note- For each criteria selected, TempWorks will generate a separate Invoice resulting in multiple Invoices and emails being sent to the Customer.

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