

Enterprise - How to Mass Assign and End Assignments

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Mass assigning and mass ending of assignments helps save time, especially if you are working with higher volume orders. If you want to know how to assign an individual employee, check out [Enterprise - How to Assign an Employee to an Order](#).

This article covers:

1. [Mass Assigning](#)
 2. [Mass Ending Assignments](#)
 - [Via the Order Status](#)
 - [Using Update Assignments Option](#)
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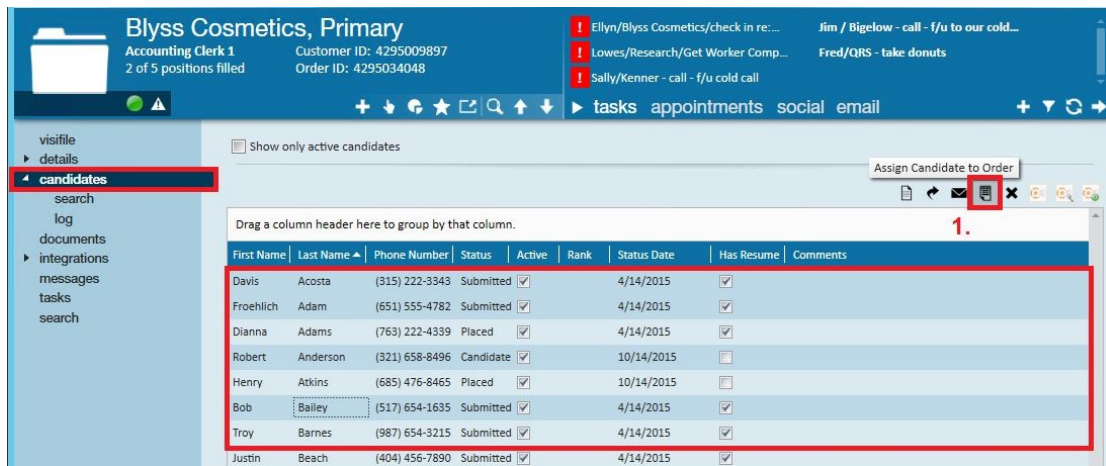
How to Mass Assign Employees

There are two ways to mass assign employees to an order, through the order/candidate form or through the order/candidate/search form.

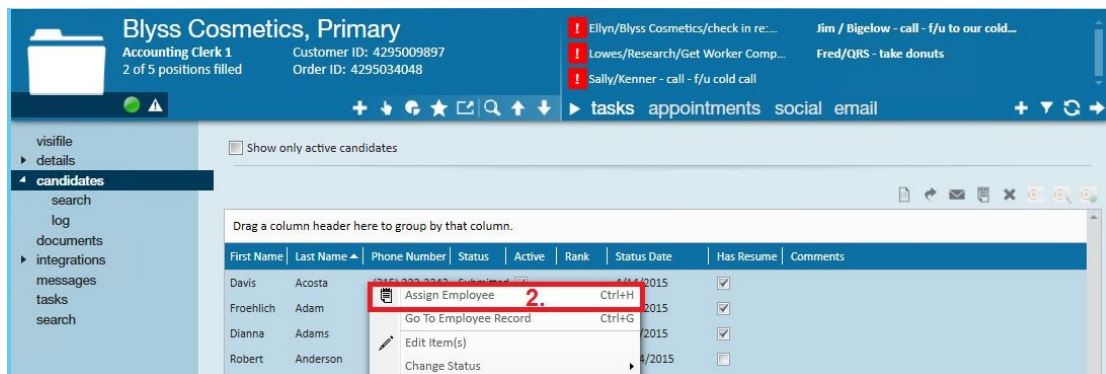
Mass assigning through the candidate worksheet:

For more information on the candidate worksheet, check out [Enterprise - How to Create and Manage the Candidate Worksheet](#).

1. Navigate to the candidate worksheet within an order (in the search section or the log of current candidates)
2. Select employees
 - Hold down shift to select a group of employees
 - Hold down the control key to select individual employees from the list
3. Click Assign
 - Select the assign candidate to order button in the upper right



- o OR right click and choose assign employee



Note You will need to review assignment restrictions, if applicable, after you select assign.

Mass Ending Assignments

There are a few different ways to end assignments, en masse, depending on your desired end result.

Option 1 - Change Order Status

Use this option if all assignments should be ended as of the day they are being updated in TempWorks and they should all have an assignment status of complete.

From the order details form, change the order status to a status that indicates this order is no longer being serviced (canceled, closed, etc...).

Blyss Cosmetics, Primary
Accounting Clerk 1
6 of 5 positions filled

Customer ID: 4295009897
Order ID: 4295034048

! Ellyn/Blyss Cosmetics/check in re...
! Lowes/Research/Get Worker Comp...
! Sally/Kenner - call - f/u cold call

Jim / Bigelow - call - f/u to our cold...
Fred/QRS - take donuts

tasks appointments social email

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details

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

employee

customer

order

- assignment
- contact
- calendar
- reports
- all options

Order Details Web Options ACA Surcharge

customer information

Customer ID: 4295009897 Work Site: Primary
123 Main Street
Palm Bay, FL 32908

Worker Comp: FL 8816

Alt Order ID: []

Directions: []

financial details

Multiplier	1.45	Pay Periods	52
Bill Rate	\$14.50	Pay Rate	\$10.00
Unit Bill Rate	\$0.50	Unit Pay Rate	\$0.25
Factor	1.5000	Other Agency Pay	\$0.00
Time Bill	\$20.25	Overtime Pay	\$15.00
Time Bill	\$29.00	Doubletime Pay	\$20.00
Time Plan	PlanSTD	GP Percent	22.39%
ed GM %	35.00000000	GP Estimate	\$519.52

job information

Required: 5

Order Type: TE T

Job Title: []

Description: []

Dress Code: Jeans OK

Safety Notes: []

Start Date: 4/14/2015

Duration: 10 weeks

Est. End Date: 6/23/2015

Shift: C Shift

Start Time: 5:00 PM End Time: 11:00 PM

Shift Notes: []

☐ Sun ☒ Mon ☒ Tues ☒ Wed ☒ Thu ☒ Fri ☐ Sat

TempWorks Enterprise

⚠ Order Status Closed

Would you like to close the associated assignments?

➔ Yes

➔ No

contacts

Name	Description	Office Phone
Smith, Mary	Ordered By	3216868458
Becker, Bob	Report To	321-456-3455
Becker, Bob	Supervisor	321-456-3455

other information

Status: Cancelled Taken By: dwood

Sales Team: dwood Branch: Memphis SE

Do Not Auto-Close: TW Time Clock: PeopleNet:

Notes: []

Upon saving a prompt will appear asking if you would like to close all the associated assignments. Click to select yes and all assignments will be ended as of the date the update is taking place and with a status of complete.

Blyss Cosmetics, Primary
Accounting Clerk 1
6 of 5 positions filled

Customer ID: 4295009897
Order ID: 4295034048

! Elyn/Blyss Cosmetics/check in re...
! Lowes/Research/Get Worker Comp...
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Jim / Bigelow - call - f/u to our cold...
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tasks appointments social email

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- details
- candidates
- documents
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- tasks
- search

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

messages

Date	Action	Message	Rep
4/14/2015	Submitted	Submitted -- Blyss Cosmetics Comments:	dwood
4/14/2015	Submitted	Submitted -- Blyss Cosmetics Comments:	dwood
4/14/2015	Submitted	Submitted -- Blyss Cosmetics Comments:	dwood
4/14/2015	Submitted	Submitted -- Blyss Cosmetics Comments:	dwood
4/14/2015	Submitted	Submitted -- Blyss Cosmetics Comments:	dwood
4/14/2015	Submitted	Submitted -- Blyss Cosmetics Comments:	dwood

employee

customer

order

assignment

contact

calendar

reports

all options

assignments

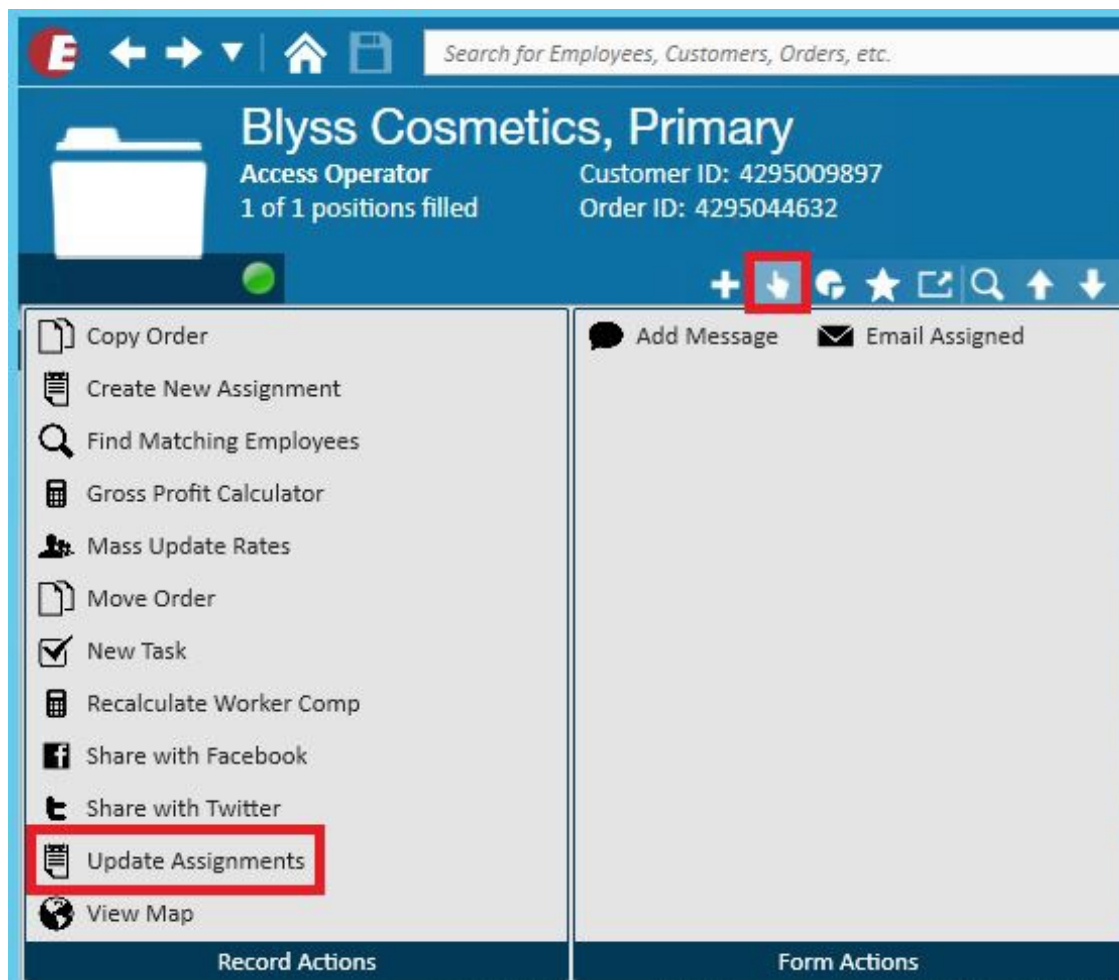
Employee	Perf Code Description	Orig. Start	Start	End	Pay	Bill
Adams, Dianna	Complete	4/14/2015	4/14/2015	10/14/2015	\$10.00	\$14.50
Atkins, Henry L	Complete	4/14/2015	4/14/2015	10/14/2015	\$10.00	\$14.50
Acosta, Davis	Complete	4/14/2015	4/14/2015	10/14/2015	\$10.00	\$14.50
Adam , Froehlich A	Complete	4/14/2015	4/14/2015	10/14/2015	\$10.00	\$14.50
Anderson, Robert	Complete	4/14/2015	4/14/2015	10/14/2015	\$10.00	\$14.50
Bailey, Bob	Complete	4/14/2015	4/14/2015	10/14/2015	\$10.00	\$14.50

Option 2 - Update Assignments Option

If the assignments end on different days, for different reasons, or if you want to indicate that certain employees should not return, use option 2, actions/update assignments.

From Order Actions:

1. Navigate to the order record and select the Actions menu at the top
2. Choose Update Assignments



OR

From Assignment Search Results:

1. Run your search for all assignments for a customer, job title, employee name, etc.
2. Select all the assignments you want to update
 - Hold CTRL on your keyboard to pick and choose
 - Hold SHIFT on your keyboard to grab a group
3. Right Click and choose Update Assignments

Last Name First Name Customer RepName

Assignment ID Employee ID Active Branch

Enhance Search Saved Searches

Your search returned 17 results.

Drag a column header here to group by that column.

Assig...	Employee Name	Customer	Department	Job Title	Bill Rate	Pay Rate	Start Date	End
430140...	Adams, Dianna	Cotton Candy	Punch		00	\$0.00	11/19/2019	
430140...	Anders, Dalyce	Cotton Candy	Punch		00	\$0.00	11/19/2019	
430140...	Brosnan, Pierce	Cotton Candy	Punch		00	\$0.00	11/19/2019	
430140...	Brosnan, Pierce	Cotton Candy	Punch		00	\$0.00	11/19/2019	
430140...	Freeman, Liz	Cotton Candy Dre...	Primary		00	\$12.00	3/18/2019	
430140...	Grier, Gus	Cotton Candy	Punch		00	\$20.00	11/19/2019	
430140...	Johnson, Mac T	Cotton Candy	Punch	Production Worker		\$25.00	\$20.00	11/19/2019

This will open the update assignments form and list everyone who is currently assigned to that order. Here you will have a few different options

Individual Updates:

For each assignment, you can update the ending performance code or assignment status, message action code, add a performance note, set the end date, and/or DNA the employee to that specific customer.

update assignments

Mass Update Options

Select All Assignments

Eligible Assignments

Up...	Name	Start Date	Performance Co...	Message Action	Customer DNA...	Perf Note	End Date
<input type="checkbox"/>	Adams, Dianna	11/19/2019	Excellent	Ended	<input type="checkbox"/>	Always on time and a great worker	1/8/2020
<input type="checkbox"/>	Anders, Dalyce	11/19/2019	Complete	Ended	<input type="checkbox"/>		
<input type="checkbox"/>	Brosnan, Pierce	11/19/2019	Open	Ended	<input type="checkbox"/>		
<input type="checkbox"/>	Brosnan, Pierce	11/19/2019	Open	Ended	<input type="checkbox"/>		
<input type="checkbox"/>	Freeman, Liz	3/18/2019	Open	Ended	<input type="checkbox"/>		

Note If this box is not checked, no changes will be saved for that assignment.

Note The customer dna employee is dna'ing the employee from the customer/department only, if the customer has requested the employee never return to the customer, it is recommended that the dna be set at the customer or employee.

Mass Update Options:

Maybe all the people on your list are ending the same day, etc. There are options to update all or some of the assignments selected en mass.

1. Determine which assignments you want to update

The screenshot shows the 'update assignments' interface. Under the 'Mass Update Options' section, the 'Deselect All Assignments' checkbox is checked. Below this is a table of 'Eligible Assignments' with columns: Up..., Name, Start Date, Performance Co..., Message Action, Customer DNA..., Perf Note, and End Date. The table contains five rows of data, with the first row highlighted. The 'Deselect All Assignments' checkbox is highlighted with a red box.

Up...	Name	Start Date	Performance Co...	Message Action	Customer DNA...	Perf Note	End Date
<input type="checkbox"/>	Adams, Dianna	11/19/2019	Excellent	Ended	<input type="checkbox"/>	Always on time and a great worker	1/8/2020
<input checked="" type="checkbox"/>	Anders, Dalyce	11/19/2019	Complete	Ended	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Brosnan, Pierce	11/19/2019	Open	Ended	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Brosnan, Pierce	11/19/2019	Open	Ended	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Freeman, Liz	3/18/2019	Open	Ended	<input type="checkbox"/>		

- Select the checkbox next to the employees you want to include for the mass update
- Use the Select All Assignments option to check the box next to all of them

2. Select the Mass Update Options

The screenshot shows the 'update assignments' interface. Under the 'Mass Update Options' section, there are several fields: 'Performance Code' (set to Complete), 'Message Action' (set to Ended), 'End Date' (set to 1/7/2020), 'Performance Note', and 'Expected End Date'. There is also a checkbox for 'Is Customer DNA' which is checked. Below these fields is the 'Apply to Selected Assignments' button. The 'Deselect All Assignments' checkbox is also visible. Below this is a table of 'Eligible Assignments' with columns: Up..., Name, Start Date, Performance Co..., Message Action, Customer DNA..., Perf Note, and End Date. The table contains three rows of data, with the first row highlighted. The 'Mass Update Options' section is highlighted with a red box.

Up...	Name	Start Date	Performance Co...	Message Action	Customer DNA...	Perf Note	End Date
<input type="checkbox"/>	Adams, Dianna	11/19/2019	Excellent	Ended	<input type="checkbox"/>	Always on time and a great worker	1/8/2020
<input checked="" type="checkbox"/>	Anders, Dalyce	11/19/2019	Complete	Ended	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Brosnan, Pierce	11/19/2019	Open	Ended	<input type="checkbox"/>		

3. Choose which fields you want to update

4. Select Apply to All Selected Assignments

update assignments

Mass Update Options

Performance Code: Complete | Message Action: | End Date: 1/7/2020

Performance Note: | Expected End Date: | **Apply to Selected Assignments**

Is Customer DNA

Deselect All Assignments

Eligible Assignments

Up...	Name	Start Date	Performance Co...	Message Action	Customer DNA...	Perf Note	End Date
<input type="checkbox"/>	Adams, Dianna	11/19/2019	Excellent	Ended	<input type="checkbox"/>	Always on time and a great worker	1/8/2020
<input checked="" type="checkbox"/>	Anders, Dalyce	11/19/2019	Complete	Ended	<input type="checkbox"/>		1/7/2020 12:00...
<input checked="" type="checkbox"/>	Brosnan, Pierce	11/19/2019	Complete	Ended	<input type="checkbox"/>		1/7/2020 12:00...
<input checked="" type="checkbox"/>	Brosnan, Pierce	11/19/2019	Complete	Ended	<input type="checkbox"/>		1/7/2020 12:00...
<input checked="" type="checkbox"/>	Freeman, Liz	3/18/2019	Complete	Ended	<input type="checkbox"/>		1/7/2020 12:00...

5. Select Save to save your changes

Note If this box is not checked next to the employee name, no changes will be saved for that assignment.

When done with the necessary changes click save. This will update all assignments selected:

assignments

Employee	Perf Code Description	Orig. Start	Start	End	Pay	Bill
Thresher, Cameron	Open	8/17/2015	8/17/2015		\$10.00	\$13.10
Jenkins, Joann	Open	8/17/2015	8/17/2015		\$10.00	\$13.10
Baba, Ayano	Excellent	8/17/2015	8/17/2015	10/14/2015	\$10.00	\$13.10
Bailey, Brian John	No Show/No Call but...	8/17/2015	8/17/2015	10/1/2015	\$10.00	\$13.10
Billigans, Robert	Excellent	8/17/2015	8/17/2015	10/16/2015	\$10.00	\$13.10
Cameron, Charles	Open	8/17/2015	8/17/2015		\$10.00	\$13.10
Brody, Gavin	Open	8/17/2015	8/17/2015		\$10.00	\$13.10

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