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

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

	Blyss C Accounting Cl 2 of 5 position			4295009897				yn/Blyss Cosmeti wes/Research/Ge lly/Kenner - call -	et Worker Comp		low - call - f/ - take donut	'u to our cole is	I	Î
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log		Drag a colu	umn header he	re to group by th	hat column	i.						1.		-
documentsintegrations		First Name	Last Name 🔺	Phone Number	Status	Active	Rank	Status Date	Has Resume	Comments				
messages		Davis	Acosta	(315) 222-3343	Submitted			4/14/2015	X					
tasks		Froehlich	Adam	(651) 555-4782	Submitted			4/14/2015						
search		Dianna	Adams	(763) 222-4339	Placed	V		4/14/2015	V					
		Robert	Anderson	(321) 658-8496	Candidate			10/14/2015						
		Henry	Atkins	(685) 476-8465	Placed			10/14/2015						
		Bob	Bailey	(517) 654-1635	Submitted			4/14/2015	V					
		Troy	Barnes	(987) 654-3215	Submitted			4/14/2015	V					
		Justin	Beach	(404) 456-7890	Submitted	V		4/14/2015	V					_

• OR right click and choose assign employee

	Blyss C Accounting Clu 2 of 5 position		Customer ID: Order ID: 429	4295009897		Lowes/Re	s Cosmetics/check in r search/Get Worker Co ner - call - f/u cold call	mp Fred/QRS -			ır cold		
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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...).

Accounting C	Accounting Clerk 1 6 of 5 positions filled Customer ID: 429500 Order ID: 429503404				Ellyn/Blyss Cosme Lowes/Research/ Sally/Kenner - call	Get Wo	orker Com			ow - call - f/u to our take donuts	cold
		+ + 6	* 🖆 🍳	• + +	▶ tasks app	ointn	nents	soci	ial email	()	F 🕇 🖸
visifile	Order Details	Web Options	ACA Surchar	ge							
details	customer	informatio	on				financ	ial d	etails		
adjustments interest codes	Customer ID	4295009897	Q	Work Site			Multiplier	r	1.45 -	Pay Periods	52
invoice recipients	Worker Comp	FL 8816	*		123 Main Street * Palm Bay, FL 32908	Q	Bill Rate		\$14.50	Pay Rate	\$10.00
po setup	Alt Order ID				Paint Day, FE 32908		Unit Bill R	late	\$0.50	Unit Pay Rate	\$0.25
required documents	Directions		Te	empWork	s Enterprise		ctor	r	1.5000 -	Other Agency Pay	
vendors candidates		Gos	0.1.0				ime		\$20.25	Overtime Pay	\$15.00
documents	job inform	nati 🔔	Order St	atus Clos	sed		etin	ne Bill	\$29.00	Doubletime Pay	\$20.00
integrations	Required	5	Would you	like to clos	e the associated assignn	nents?		Plan	PlanSTD *	GP Percent	22.39%
messages tasks	Order Type	TE T						SM %	10000000000	GP Estimate	\$519.52
search	Job Title	Acco	→ Yes				cu G	3191 20	35.00000000		\$519.52
	Description		> No				tao	cts		/	
							e		Descriptio	n 🔺 Office Pho	ne
							Smith, M	lary	Ordered B	y 321686849	i8
employee							Becker, B	lob	Report To	321-456-34	155
	Dress Code	Jeans OK				9	Becker, B	lob	Supervisor	r 321-456-34	155
customer	Safety Notes										
order	Start Date	4/14/2015					otheri	infor	mation		
assignment	Duration	10 weeks				-	Status		celled	Taken By dwoo	d
contact	Est. End Date	6/23/2015				•	Sales Tear				phis SE
	Shift	C Shift				*					
calendar	Start Time	5:00 PM		End Time	11:00 PM		Do Not A	uto-Clo	ise 🔄 I W	Time Clock 📃 🛛	PeopleNet
reports	Shift Notes						Notes				
all options		Sun 🗙 Mor	n 🗙 Tues 🕱	Wed 🗙 T	hu 🗙 Fri 📕 Sat						

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.

Account		Primary mer ID: 42950098 D: 4295034048	97	Ellyn/Blyss Lowes/Res Sally/Kenn	earch/G	et Worker	Comp		ow - call - f/u ti take donuts	o our cold	
0		+ 👆 🗣 🛧 🗅	1 Q 🛧 🕴	► tasks	appo	ointmer	nts so	cial email		+ 7	0-
visifile	order snaps	hot						order sta	tus		
details	Customer Blyss	Cosmetics Q	Title	Accounting Clerk 1		Pay Rate	\$10.00	Status	Cancelled		
candidates documents	Department Prim	агу	Description			Bill Rate	\$14.50	Date Opened	4/14/2015 2:1	9:00 PM	
integrations	Order ID 4295	034048	Branch	Memphis SE				Date Opened	4/14/2013 2.1	5.00110	
messages	Supervisor Beck	er, Bob 🔍	Office Phone	321-456-3455	Q			Duration	10 weeks		
tasks search	messages										
	Date	Action	Message							Rep	1
	4/14/2015	Submitted	Submitted	Blyss Cosmetics	Comn	nents:				dwood	
	4/14/2015	Submitted	Submitter	I Blyss Cosmetics	Comn	n <mark>ents:</mark>				dwood	
	4/14/2015	Submitted	Submittee	I Blyss Cosmetics	Comn	ments:				dwood	
	4/14/2015	Submitted	Submitted	I Blyss Cosmetics	Comn	nents:				dwood	
	4/14/2015	Submitted	Submitted	Blyss Cosmetics	Comn	ments:				dwood	
	4/14/2015	Submitted	Submitted	I Blyss Cosmetics	Comn	ments:				dwood	
employee	assignments	;						R			0,
customer	Employee	Perf Code Desc	ription Orig. St	art Start		End	1	Pay			Bill
order	Adams, Dianna	Complete	4/14/2	015 4/14/201	5 1	10/14/2015	; ;	10.00		\$1	14.50
assignment	Atkins, Henry L	Complete	4/14/2	015 4/14/201	5 :	10/14/2015	; \$	10.00		\$1	14.50
contact	Acosta, Davis	Complete	4/14/2	015 4/14/201	5 :	10/14/2015	; ş	10.00		\$1	14.50
calendar	Adam , Froehlich A	Complete	4/14/2	015 <u>4/14/201</u>	5 :	10/14/2015	5 \$	10.00		\$1	14.50
	Anderson, Robert	Complete	4/14/2	015 4/14/201	5 :	10/14/2015	5 Ş	10.00		\$1	14.50
reports	Bailey, Bob	Complete	4/14/2	015 4/14/201	5 :	10/14/2015	\$	10.00		\$1	14.50
all options	•										-

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 a select the Actions menu at the top
- 2. Choose Update Assignments

E ← → ▼ A P Search for En	nployees, Customers, Orders, etc.							
Access Operator 1 of 1 positions filled Blyss Cosmetics, Primary Customer ID: 4295009897 Order ID: 4295044632								
	+ 😼 🧲 🛨 🔍 🛧 🔸							
Copy Order	🗭 Add Message 🛛 🗠 Email Assigned							
Create New Assignment								
Q Find Matching Employees								
Gross Profit Calculator								
🌆. Mass Update Rates								
D Move Order								
🗹 New Task								
Recalculate Worker Comp								
Share with Facebook								
E Share with Twitter								
Update Assignments								
🚱 View Map								
Record Actions	Form Actions							

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 Assignment ID		First Name Employee ID		Customer Active	cotton Active	RepName Branch	All Reps All Branche	▼ Q ▼ Sear	ch		
	Enhance Search Saved Searches										
Your searc	h returned	17 results.									
Drag a colum	n header here to	group by that c	olumn.								
Assig Empl	oyee Name C	ustomer	Department	Job Tit	e Bill	Rate	Pay Rate	Start Date	E		
430140 Adan	ns, Dianna Co	otton Candy	Punch	L View Er	mployee	po	\$0.00	11/19/2019			
430140 Adan 430140 Ande		otton Candy otton Candy	Punch Punch	Log Me		00 00	\$0.00 \$0.00	11/19/2019 11/19/2019			
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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.

	ss Update Options							
	ect All Assignments le Assignments							
)	Name	▲ Start Date	Performance Co	Message Action	Customer DNA	Perf Note	End Date	
	Adams, Dianna	11/19/2019	Excellent -	Ended -		Always on time and a great worker	1/8/2020	▦
	Anders, Dalyce	11/19/2019	Complete	Ended				
	Brosnan, Pierce	11/19/2019	Open	Ended				
	Brosnan, Pierce	11/19/2019	Open	Ended				
	Freeman, Liz	3/18/2019	Open	Ended				

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

Ξ ι	update assi	gnments					
🕑 Ma	ss Update Options						
	elect All Assignments Die Assignments						
Up	Name	Start Date	Performance Co	Message Action	Customer DNA	Perf Note	End Date
	Adams, Dianna	11/19/2019	Excellent 🔹	Ended -		Always on time and a great worker	1/8/2020 ⊞
×	Anders, Dalyce	11/19/2019	Complete	Ended			
×	Brosnan, Pierce	11/19/2019	Open	Ended			
×	Brosnan, Pierce	11/19/2019	Open	Ended			

- 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

erforma	ance Code Complet	te	 Message Action 	1	- E	nd Date	1/7/2020	 Apply to Selecte	≥d
erforma	ance Note				E	xpected End Date		 Assignments	
] Is Cus	stomer DNA								
	lect All Assignment	-							
Desel	iect All Assignment	2							
_	e Assignments								
ligible	-		Performance Co	Message Action	Customer DNA.	. Perf Note		End Date	1
igible	e Assignments		Performance Co	Message Action			e and a great worker	End Date	
ligible	e Assignments _{Name}	▲ Start Date		_			e and a great worker		

- 3. Choose which fields you want to update
- 4. Select Apply to All Selected Assignments

ື ເ	update ass	signments							
🔿 Ma	ass Update Options								
Perforr	mance Code Complet	e	 Message Action 	n		d Date	1/7/2020	■	Apply to Selected
Perforr	mance Note				Ex	pected End Date			Assignments
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	select All Assignments								
	ole Assignments		Performance Co	Message Action	Customer DNA	Perf Note			End Date
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Eligib	ole Assignments _{Name}	▲ Start Date					and a great worker		
Eligib Up	ole Assignments Name Adams, Dianna	Start Date 11/19/2019	Excellent -	Ended -			and a great worker		1/8/2020 ▦
Eligib Up	ole Assignments Name Adams, Dianna Anders, Dalyce	 ▲ Start Date 11/19/2019 11/19/2019 	Excellent -	Ended -			and a great worker		1/8/2020 ■ 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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