Beyond - Managing Customer Defaults

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What are Customer Defaults?

The Defaults tab allows users to establish standards for multiplier codes and shifts that apply to the customer so they automatically flow into that customer's orders. When properly set, this can be a powerful tool to expedite the creation of orders and eliminate making errors.

To find Customer Defaults, navigate to the Customer record and select the Defaults tab:



Customer Default Options:

- 1. Multiplier Codes
- 2. Shifts

- 3. Worker Comp Codes
- 4. Job Descriptions

Multiplier Codes

Multiplier codes, or markups, allow for the generation of a bill rate based on the pay rate when entered into the order's financial card.

Select the multiplier code option from the drop-down. Here, current multiplier codes can be viewed and new ones can be added. Click the '+' icon to open the add multiplier code window:

VISIFILE	DETAI	S	~	C	DEF	AULI	тs	~		DOCUMEN	TS	INVOICE	E HISTO	RY	INVO	ICE S	ETUP	~	М	ORE	
Apply multipl	ier code:	s to	depar	rtme	ents	С															+
Drag a colum	n header h	ere t	o grou	ıp by	y tha	it colu	umn														
Multiplier Code		Priori	ty				D	efault S	Set B	Ву											
1.42		2					т	his cus	ton	ner											:

In the upper left-hand corner, the system highlights the section users are currently viewing. The following example below shows users are in the Customer > Defaults > Multiplier Codes.

Note If this is the first time you are setting up a multiplier code for this customer, note that the system will display "None" with a priority of 1 and the following message will display:

VISIFILE	DETAILS	~	DEFAULTS	~	DOCUMENTS	INVOICE HISTORY	INVOICE SETUP	~	MORE			
The customer defaults below are inherited. If you add a default to this customer, the inherited values will no longer apply.												
Apply multiplier codes to departments												
Multiplier Code Priority Default Set By												
None	1		Sj	ystem								

Once the '+' icon is selected, the system will open the multiplier code window.

From the drop-down, select the matching code:

Add Default Multiplier Code			
Multiplier Code 1.31	ֆիս		
Multiplier Code	Reg. Markup	OT Markup	DT Markup
None	1	1	1
1 to 1	1	1.5	2
1.015	1.015	1.015	1.015
1.2	1.234	1.234	1.234

Note If you have not yet established multiplier codes in Administration, the drop-down will be blank. For more information on adding multiplier codes, see Creating Multiplier Codes.

Add Default	Multiplier	Code
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Multiplier Code 1.31		Ŧ
Priority 1		
SAVE AS DRAFT	CANCEL	SUBMIT

Priority: A numeric value which will determine the placement of this code in the order and assignment details page multiplier code drop-down list. Priority 1 is the order multiplier default for the customer. Users may add as many as codes as necessary to a customer record, however, no two codes can share the same priority value.

The priority is automatically assigned as the next available number, following a standard numerical order. Click 'Submit' in the lower right to close the window and add the new multiplier code. Any/all saved codes will immediately display in the multiplier codes table.

VISIFILE	DETAI	LS	~	DI	EFAL	ULTS	~		DOCUMENTS	INVOICE HISTOR	r	INVOICE SETUP	`	/	MORE	
Apply multip	lier code	s to	depa	ırtmer	nts	0										+
Multiplier Code		Prior	ity			I	Default	Set	Ву							
1.31		1				-	This cu	stor	mer							:

Shifts

Shifts are the customer specific start times, end times, break times, and days that employees are scheduled to work. Shifts that display here will automatically populate into the parallel shift fields within the 'Job Information' card of the 'Details' tab for all new orders for this customer.

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Primary · • Lake Elmo, MN 55042

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 Multiplier Codes

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 Shifts

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 Worker Comp Codes

To add a shift, select 'Shifts' from the defaults tab and icon to open the 'Shifts' window:

In the upper left hand corner, the system highlights the section users are currently viewing. The following example below shows users are in the Customer > Defaults > Shifts.

VISIFILE	DETAILS 🗸	DEFAULTS V DOG	CUMENTS INVOICE HISTORY	INVOICE SETUP	✓ MORE	
The custome	er defaults below are	e inherited. If you add a	default to this customer, the inh	nerited values will no l	onger apply.	
Apply shifts	to departments					+
Drag a colum	in header here to group	by that column				
Shift	Start	End	Default Set By			
Evening	3:00 PM	11:00 PM	System			
Morning	8:00 AM	4:30 PM	System			

Select the '+' icon to open the 'Add Default Shift' wizard:

Add Default Shift			
Shift Name Graveyard			
Start Time 10:00 PM	End Time 6:00 AM		
Minutes of Break Per Day 30			
Mon 🗌 Tue 🗌 Wed 🗌	— Thu 🗹 Fri		
Sat Sun			
SAVE AS DRAFT		CANCEL	SUBMIT

- Shift: (Required) A free text field (10 character limit) used to name/briefly describe the shift.
- Start Time: (Required) When the shift begins. The time the employee is expected to arrive.
- End Time: (Required) When the shift ends. The time the employee can expect to be done with work.
- Break Minutes: The length of time a customer has allotted for employee breaks in minutes.
- Days Worked: The days of the week the employee is expected to report to work at the customer.
- Notes: Notes strictly related to the shift that may be helpful to save.
 - For example: "Crucial that employees are on time! They have a strict shift rollover schedule--3rd shift staff CANNOT punch out until 1st shift staff punches in!" Any notes entered display for reference only and do not appear elsewhere. They do not flow into orders, assignments, etc.

Click 'Submit' in the lower right to close the form and save the shift.

Select the 'dot' icon to edit or remove a saved shift:

VISIFILE	DETAILS V	DEFAULTS 🗸	DOCUMENTS	INVOICE HISTORY	INVOICE SETUP	~	MORE	
Apply shifts t	o departments							+
Shift	Start	End	De	fault Set By				
Graveyard	10:00 PM	6:00 AM	Th	is customer				ß
							1	Edit
								Delete

Note The system shift defaults will disappear after at least one shift has been added. They will have to be recreated to utilize those shifts.

Worker Comp Codes

Note If you utilize default Security Groups, you will need to ensure the "Can edit customer default worker comp codes" permission has been added to all the Security Groups that require this functionality:

Q	worker	\times
	Can edit customer default worker comp codes Allows a user to create, edit, and delete customer default worker comp codes	

If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Worker Comp Codes" page within Customer > Defaults > Worker Comp Codes along with all associated fields and forms within the dropdowns to the Security Groups that require the functionality:

BY PAGE	BY FIELD	Selecting a pa	arent selects children 🔽
Customer	^		Access
Defaults Worker Comp Codes	Page		Access
	Worker Comp Code Form		Access
Worker Comp Co	de Field		Read 🗸 Write
Priority Field V Job Order (2)		 ✓ 	Read Vrite
 Assignment (2) 		✓	Access

For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "Beyond - Creating Security Groups with Advanced Permissions".

Setting up worker comp code defaults on the customer record allows you to set and rank the only available worker comp options on any order record for this customer. This can help reduce the chance of recruiters or sales selecting the incorrect worker comp code for any given order.



To Add a Default Worker Comp Code:

- 1. Navigate to the Customer record
- 2. Select Defaults > Worker Comp Code
- 3. Select the '+' icon

VISIFILE	DETAILS	~	DEFAULTS	~	DOCUMENTS	INVOICE HISTORY	INVOICE SETUP	~	MORE
Apply worke	r comp code	es to de	epartments						+
					No res	sults			Add Default Worker Comp Code

4. Choose the worker comp code and set a priority

Add Default Work	er Comp Co	de
Worker Comp Code		
Food and Beverage		Ψ.
Priority		
1		
SAVE AS DRAFT	CANCEL	SUBMIT

5. Select Submit

Job Descriptions

Job descriptions can be a great tool to save staffing specialists time when a job description is consistent for the client within an order. Users may select a job title and enter detailed information in relation to that specific position, in return when the job title is selected within the order the information will pre-populate yet can still be modified on the order if necessary.

Note If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Job Descriptions" page within Customer > Defaults > Job Descriptions along with all associated fields and forms within the dropdowns to the Security Groups that require the functionality:

BY PAGE	BY FIELD	Selecting a parent selects children 🖌
Q job desc	×	
∧ Customer		Access
▲ Defaults		
 Job Descriptions 	Page	Access
∧ Add Job Descr	iption Form	Access
Job Title 📑	ield	🗸 Read 🔀 Write
Public Job T	Title Field	🗸 Read 🔀 Write
<mark>Job Desc</mark> rip	tion Field	🔽 Read 🔽 Write
Public <mark>Job [</mark>	Description Field	🔽 Read 🔽 Write
Education 9	Eeld Eeld	Dearl 🔽 Write

For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "Beyond - Creating Security Groups with Advanced Permissions".

To add a default job description:

1. Navigate to the customer you want to add a default job description for:

VISIPILE DETAILS V DEFAULTS V DOCUMENTS INVOICE HISTORY INVOICE SETUP V MESSAGES CUSTOM DATA	t≡
✓ Snapshot	
✓ Note	0
 Addresses 	•
 Contacts 	+
 Contact Information 	+
✓ Messages	+
 Unfilled Job Orders 	•
 ✓ Assignments 	Ŧ

2. Select Defaults > Job Descriptions to navigate to the "Job Descriptions" page:

VISIFILE DETAILS V DEFAULTS V DOCUMENTS INVOICE HISTORY INVOICE SETUP V MESSAGES CUSTOM DATA
Apply default job description to departments

3. Select "+ Add Job Description" in the upper right:

VISIFILE DETAILS 🗸	DEFAULTS 🗸	DOCUMENTS	INVOICE HISTORY	INVOICE SETUP 🗸	MESSAGES	CUSTOM DATA	
Apply default job descri	ption to departm	ents 🗩					+ ADD JOB DESCRIPTION

4. Within the "Add Job Description" window, select the Job Title your recruiters would select on the Job Order:

Add Job Description		
* Job Title 12 hour nurse weekend	Ŧ	Public Job Title

5. Enter the Job Description:

Add Job Description		
Job Title	Public Job Title	
2 hour nurse weekend	·	
Job Description		
his is a job for nurses working 12 hour shifts over the	weekend	

6. Optionally, if you are posting to the Job Board, enter a "Public Job Description" and a "Public Job Title" that will display on the Job Board:

Add Job Description	
* Job Title 12 hour nurse weekend	Public Job Title
• Job Description This is a job for nurses working 12 hour shifts over the weekend.	
Public Job Description $B i \bigcup A \leftarrow Aa \leftarrow A A: = \leftarrow i \equiv \leftarrow i$	E▼¶; c⊃⊞ +; ⊳ ⊲ ;
Type something	

- Please see the article titled How to Post Orders to the Job Board for more information.
- 7. Finally, if applicable, enter information within the "Education Summary" and "Experience Sumarry" fields:

Add Job Description		
Job Title Public Job Title 2 hour nurse weekend		
Job Description his is a job for nurses working 12 hour shifts over the weekend.		
ublic Job Description		
$B i \underline{\cup} A \stackrel{\bullet}{} A \stackrel{\bullet}{} A \stackrel{\bullet}{} A \stackrel{\bullet}{} E \stackrel{\bullet}{} \stackrel{\bullet}{$	<u> </u>	:
Type something		
ducation Summary		
aucation summary		
xperience Summary		
VE AS DRAFT	CANCEL	SUB

8. Once all of the information has been added, select "Submit" to save the Job Description.

Note Default Job Descriptions are able to be edited or deleted within Defaults > Job Descriptions by selecting the icon to the right of the entry and either selecting "Edit" or "Delete": VISIFILE DETAILS V DEFAULTS V DOCUMENTS INVOICE HISTORY INVOICE SETUP V MESSAGES CUSTOM DATA Apply default job description to departments Job Title Public Job Title Job Description Public Job Description Education Summary Experience Summary Test Education Summary 12 hour nurse weekend This is a job for nurses working 12 hour shifts ov... Test Experience Summary / Edit Rows per page: 20 💌 1 of 1 Delete

Selecting the option for "Apply default job description to departments" will ensure all default job descriptions setup on the primary customer record will also apply to the associated department records:

VISIFILE DETAILS V	TS V DOCUMENTS INVO	DICE HISTORY INVOICE SETUP 🗸 MESSAGES	CUSTOM DATA				
Apply default job description to d	departments 🛑				-	+ ADD JOB DESC	RIPTION
Job Title Pub	blic Job Title	Job Description	Public Job Description	Education Summary	Experience Summary		
12 hour nurse weekend		This is a job for nurses working 12 hour shifts ov		Test Education Summary	Test Experience Summary		:
					Rows per page: 20 💌 1 o	11 < 1	>

Note When navigating to a department record associated with the primary that has default job descriptions applied to all departments, you will see the following banner:

VISIFILE DETAILS 🗸	DEFAULTS V DOCUMENTS	INVOICE HISTORY INVOICE SETUP	✓ MESSAGES CUSTOM DATA				
The customer defaults below are inherited. If you add a default to this customer, the inherited values will no longer apply.							
Apply default job descr	iption to departments 🌘					+ ADD JOB DESC	RIPTION
Job Title	Public Job Title	Job Description	Public Job Description	Education Summary	Experience Summary		
12 hour nurse weekend		This is a job for nurses working 1	2 hour shifts ov	Test Education Summary	Test Experience Summary		:
					Rows per page: 20 💌	1 of 1 < 1	>

This means that if a new default job description is added to the department record, the previous default job descriptions will be removed.

Deleting the new default job description(s) will allow the original defaults from the primary record to appear within the department.

Therefore, it is recommended to add default job descriptions to the primary customer record if utilizing the option "Apply default job description to departments".

To apply a default job description to a Job Order:

1. Navigate to the Job Order record that will need the job description added:

VISIFILE DETAILS V CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA ASSIGNMENTS	t≡
✓ Snapshot	
✓ Messages	÷
~ Assignments	₹
 Contact Roles 	+

2. Navigate to Details > Job Information > Edit to open the "Job Information" window:

VISIFILE DETAILS V	S CANDIDATE MATCHING DOCUME	NTS MESSAGES CUSTOM DATA A	SSIGNMENTS			
 Customer Information 						0
 Job Information 						
SUN	MON	TUE	WED	THU	FRI	SAT
Job Title Unknown			Job Or Temp	der Type		
Positions Required 1			Positio 27	ons Filled		
Start Date 12/11/2019			Estima 12/11	ated End Date /2020		
Shift 			Job Or Indef	der Duration		
Start Time			End Ti 	me		
Job Description			Dress 	Code		
Safety Notes 			Shift M	lotes		

3. Within the "Job Information" window, select the Job Title that corresponds to the default job description that was setup on the customer record:

Job Informatio	on		
* Job Title Unknown	Ŧ	* Job Order Type TE	Ŧ

4. Once selected, you will be prompted with a message to override the description with the default saved one:

Job Title	* Job Order Type	
2 hour nurse weekend	▼ TE	
You have selected a default lob	Title, there is a default Job Description linked. Would you	like to apply this lob

5. Select "Apply Default" within the prompt and the default information will populate on the Job Order:

* Job Title 12 hour nurse weekend	* Job Order Type → TE	
	1 E	
	e, there is a default Job Description linked. Job Description, Public Job Title, Educatio	
Summary?		APPLY DEFAULT

6. Select "Submit" to apply the changes to the Job Order.

Related Articles