

# Enterprise - How to Move an Order

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## Why Move an Order?

During the process of creating an order a situation may arise where you need to move an order from one department to another, or even to another customer all together. This could be because the order was created in the wrong department or it could be that the customer would like to move the order and associated assignments because of financial reasons. Whatever the case, moving orders in Enterprise is a simple process.

## How to Move an Order

Navigate to the order that needs to be moved, open the actions menu, select the 'Move Order':

The screenshot displays the Enterprise software interface for a 'Production Worker' order. The top navigation bar includes a search bar and the user's name 'ALEXANDER.SWANSON: High Tech Staffing'. The main header shows the order details: 'Real Steel, Welding', 'Production Worker', '0 of 4 positions filled', 'Customer ID: 4295013212', and 'Order ID: 4295088272'. A notification indicates 'Lunch scheduled at O'Hannahs'. The left sidebar contains a list of actions, with 'Move Order' highlighted in a red box. The right sidebar shows 'financial details' and 'contacts'.

financial details			
Multiplier	1.45	Pay Periods	260
Bill Rate	\$21.75	Pay Rate	\$15.00
Unit Bill Rate	\$0.00	Unit Pay Rate	\$0.00
OT Factor	1.5000	Other Agency Pay	\$0.00
Overtime Bill	\$30.38	Overtime Pay	\$22.50
Doubletime Bill	\$43.50	Doubletime Pay	\$30.00
Overtime Plan	PlansTD	GP Percent	21.03%
Desired GM %		GP Estimate	\$793.68

contacts		
Name	Description	Office Phone
Dohanson, Jave	Hiring Mgr	

Once selected a window will appear prompting you to input the desired customer to whom the order should be moved to.

The screenshot shows a software window titled "move order" with a blue header bar containing a folder icon, a question mark, and a close button. Below the header, there is a search bar with "Real Steel" entered. A red rectangular box highlights a button labeled "Copy Order to Customer". Below the search bar is a table with three columns: "Customer ID", "Customer", and "Department". A red arrow points to the "Processing" department in the row for Customer ID 4295013185.

Customer ID	Customer	Department
4295012148	RBA Staffing	Primary
4295010447	RBW Logistics	Primary
4295013177	Reagans Autobody	Primary
4295012624	Real Steel	Finance
4295012448	Real Steel	Manufacturing
4295012443	Real Steel	Primary
4295013185	Real Steel	Processing
4295012447	Real Steel	shipping
4295013212	Real Steel	Welding
4295013123	Reality Landscape	Clerical
4295013124	Reality Landscape	Landscape
4295013122	Reality Landscape	Primary
4295010008	Reapers Bikes	Primary
4295011614	Red Dog Inc.	Primary
4294969339	Red Marlin	Primary
4295010427	Red Marlin	shoe lace department
4295012262	Red Onion Cafe	A

This process will make a copy of the original order and create it for the selected customer record. The original order and its associated assignments will be closed and have an actual end date generated with current date.

After selecting the company you may enter a start date as well as an expected end date for the new order. If the order has assignments you may choose to select the 'Copy Assignment' checkbox to copy those as well.

move order

Copy Order to Customer Real Steel

Start Date 12/6/2017

Expected End Date

Copy Assignments

Only W2 Assignments will copy.  
Assignments with a Cancelled or Deleted status will not be copied.  
Employee must also have a valid SSN if copying to another EIN.

0 Save

Select the 'Save' icon. You will be taken to the newly created order record for the correct customer.

**\*Note\*** This will not pull assignments that have any cancelled or deleted status. If transferring the order between entities the employee must have an employee record in the destination entity that shares a social security number.

Once the order is created it may be important to return to the previous order and update the status on the order that is moved. Depending on the situation this may apply.

On the newly created order you can see that in the details section under notes, a note will have generated with reference to the previous order.

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**Real Steel, Processing**  
 Production Worker      Customer ID: 4295013185  
 0 of 4 positions filled      Order ID: 4295088273

! Lunch scheduled at O'Hannahs  
 Currently viewing 1 of 1145 tasks. View more...

+ → ↺ ★ 🔍 ↑ ↓ ▶ tasks appointments social email + ↺ ↻ →

visifile  
**details**  
 adjustments  
 attendance  
 interest codes  
 invoice recipients  
 education  
 po setup  
 required documents  
 vendors  
 ▶ candidates  
 documents  
 ▶ integrations  
 messages  
**employee**  
**customer**  
**order**  
 assignment  
 contact  
 dispatcher  
 reports  
 task manager  
 contact groups  
 hot lists  
 all options ▶

**Order Details**    Web Options    ACA Surcharge

**customer information**  
 Customer ID: 4295013185    Work Site: Cookie Monster  
 332 Cookie Lane  
 Vadnais Heights, MI  
 Worker Comp: TX 3126  
 Alt Order ID:    Burden:    Directions:

**job information**  
 Required: 4    Assigned: 0  
 Order Type: TE Temp  
 Job Title: Production Worker  
 Description: Production Line Worker: Job consists of working on a manufacturing assembly line. Job could consist of making changes by hand or by running machinery equipment. Will receive objects or parts on conveyer belt, be responsible for your portion of the job, and then pass materials down conveyer belt to next line worker.  
 Dress Code: Steel toed boots  
 Safety Notes:  
 Start Date: 12/6/2017  
 Duration: Indef  
 Est. End Date: 12/10/2017  
 Shift:  
 Start Time: !    End Time: !  
 Shift Notes:  
 Sun  Mon  Tues  Wed  Thu  Fri  Sat

**financial details**  
 Multiplier: 1.45    Pay Periods: 260  
 Bill Rate: \$21.75    Pay Rate: \$15.00  
 Unit Bill Rate: \$0.00    Unit Pay Rate: \$0.00  
 OT Factor: 1.5000    Other Agency Pay: \$0.00  
 Overtime Bill: \$30.38    Overtime Pay: \$22.50  
 Doubletime Bill: \$43.50    Doubletime Pay: \$30.00  
 Overtime Plan: PlanSTD    GP Percent: 21.03%  
 Desired GM %:    GP Estimate: \$793.68

**contacts**  
 No Records Found

**other information**  
 Status: Unfilled    Taken By: alexander.swans  
 Sales Team: Default    Branch: Memphis SW  
 Do Not Auto-Close:     TW Time Clock:     PeopleNet:   
 Notes: Copied from Order: 4295088272

# Related Articles