Enterprise - Creating Interest Codes

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What are Interest Codes?

Interest codes are quick tags on records that provide different searchable and reportable information. These are extremely powerful tools for your employee, customer, contact, and order records to track any quick bits of information.

Examples of Interest Codes:

Record Type	Example Interest Codes
Employee Record	Background Check Complete Forklift Driver Bi-lingual Customer Service Warehouse High School Diploma 1st Shift
Customer	Warehouse Forklift Uses Competitor 1st Shift Background Check (requirement) Payrolled Interested in Payroll Services
Contact	Likes Starbucks Industrial Staffing Clerical Looking for Temp Employees

Record Type	Example Interest Codes
	Looking for Direct Hire Employees Uses Competitor
Order	Background Check (requirement) Forklift 2nd shift License (requirement) Customer Service

You may notice that some interest codes can be used on multiple records for slightly different meanings.

This Article Covers:

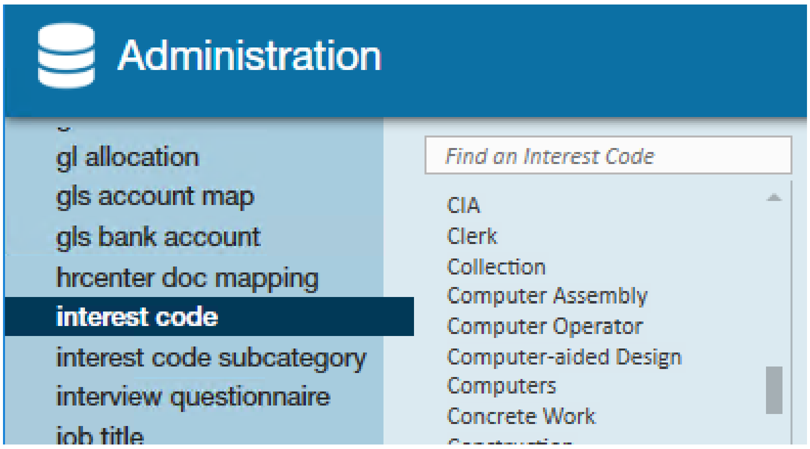
1. How to Add an Interest Code
2. How to Add an Interest Code Subcategory

How to Add an Interest Code

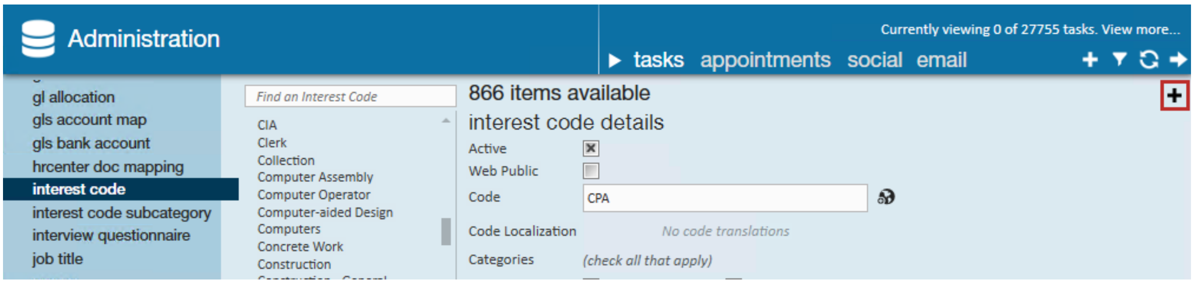
Interest Codes must be added by an administrator before they will be available for service reps to use. This article will walk through the options when creating an Interest Code in the system.

Note Before you start adding interest codes, we recommend being at the highest Hierarchy you have available (whether that is entity, subsystem, or system) to ensure you have access to edit and see all options in administration.

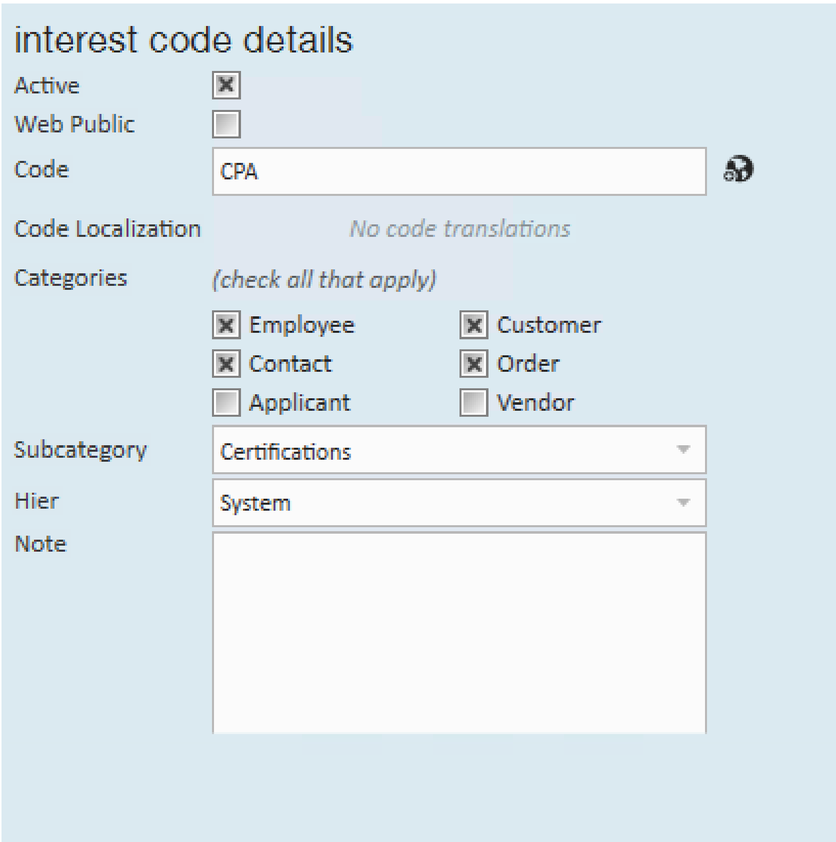
1. Navigate to All Options > Administration
2. Select Interest Code on the left (a list of interest codes will then be displayed)



3. Select the + in the upper right



4. Enter/review the following information:



- **Active** - This checkbox should remain checked. Only active interest codes can be selected on a file
- **Web Public** - Checking this box will make this interest code visible when

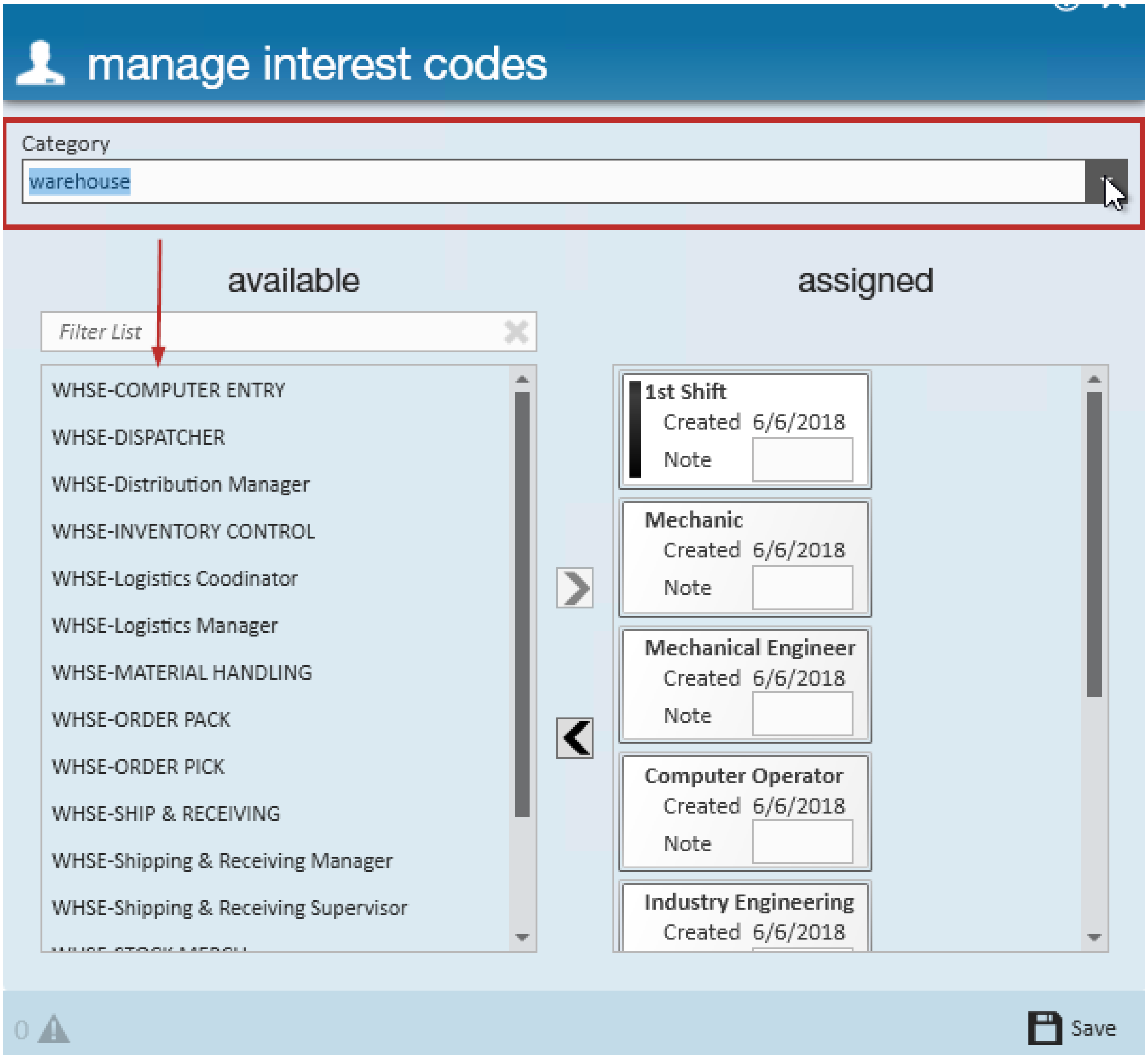
applicable in HRCenter and WebCenter. This is mostly related to the application page that allows employee's to pick their own skills/interests. If you aren't using this page or if you don't want an employee to be able to select this interest code, you can leave this option unchecked.
    - **Code** - This is where you enter the name of the interest code as you want it to appear in your system
    - **Categories** - Check all the record types that this interest code can be used on. (keep in mind that "Applicant" is related to an older version of HRCenter and "Vendor" only applies to those using our VMS)
    - **Subcategory** - This option gives you the chance to organize Interest Codes into Categories. Select the proper category from the drop down (You'll be able to add more categories, which we'll cover below)
    - **Hier** - Determines where the interest code will exist and be accessible in your database. If this interest code is only applicable to one branch, then you can set it to that branch. Most of the time, we recommend keeping interest codes at the highest level (system, subsystem, or entity) to ensure all users can utilize it.
    - **Note** - This information is only for Admin purposes. You can enter any notes as to why you entered this interest code incase you ever need to look back on it.
5. Select Save

Note If a service rep can't find an interest code you just added, make sure you have them "Refresh their Hierarchy" by selecting their name in the upper right and clicking next and finish. This will refresh their system without forcing them to log out and log back in.

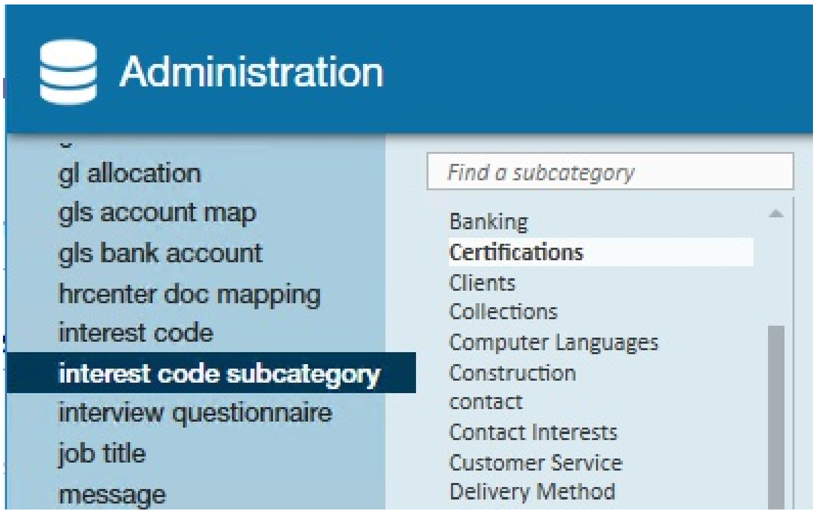
Adding Interest Code Subcategories

Once you've added a few interest codes, your system might start to seem a little cramped with options. Subcategories allow you to organize your interest codes to make them easier for service reps to find.

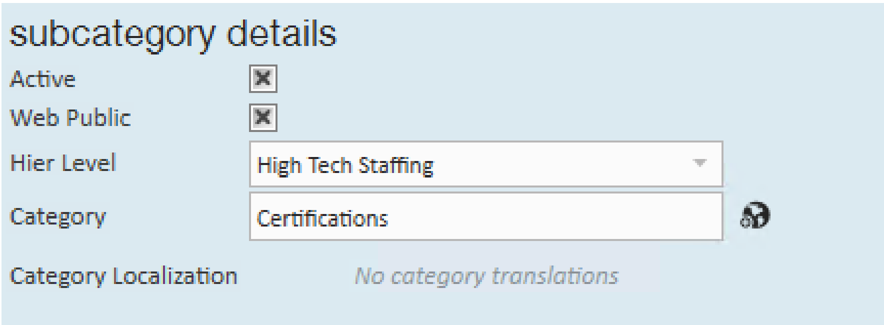
Example of How Service Reps see Category Options:



1. Navigate to All Options > Administration
2. Select Interest Code Subcategory on the left (a list of subcategories will appear)



3. Select the + on the right to add a new category
4. Enter/review the following information:



- **Active** - This checkbox should remain checked. Only active interest code categories can be selected on a file
- **Web Public** - Checking this box will make this category visible when applicable in HRCenter and WebCenter. This is mostly related to the application page that allows employee's to pick their own skills/interests. If you aren't using this page or if you don't want an employee to be able to select this interest code, you can leave this option unchecked.
- **Hier Level** - Determines where the interest code will exist and be accessible in your database. If this interest code is only applicable to one branch, then you can set it to that branch. Most of the time, we recommend keeping interest codes at the highest level (system, subsystem, or entity) to ensure all users can utilize it.
- **Category** - Enter the name of the category as you want it to appear for your users

5. Select Save

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