

Vendors - Distributing Orders to Subcontractors

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What is a Subcontractor Vendor?

These are 3rd party staffing agencies or other providers that are sending their employees to fill some of your orders. Because these employee's do not belong to your staffing agency, the payroll for these people will be consolidated into a payment to the agency. The agency is then responsible for paying and preparing tax documents for their employees.

This article will walk through the process of distributing open orders for vendors to try and fill. If you have not created a Vendor record for your Subcontractor, you will want to complete this first. Check out [Vendor - Subcontractors in Enterprise](#) for more information.

Note This option is only available if you are utilizing the Vendor Module. Check out [Vendor: Portal Quickstart](#) and [WebCenter Admin - Giving Vendors Access to the Web Portal](#) for more information.

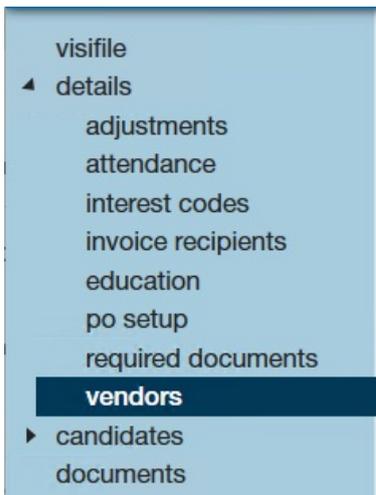
This article covers:

1. [Distributing an Order](#)
2. [Distributing Future Order From a Customer](#)
3. [What Information Shows to the Vendor?](#)

How to Distribute an Order to a Vendor

Utilize this option when you have an order that you want a vendor to submit candidates for. The order can be created the same way any other order is. Check out [Enterprise - How to Create and Manage Temporary Orders](#) for more information on creating orders.

1. Navigate to the order record you want to distribute to a Vendor
2. Select Details > Vendors on the left



3. Select the + in the upper right to add a Vendor to this order
4. Enter the following information:

A screenshot of a web form titled "edit order vendor". The form has a blue header with a question mark icon and a close icon. Below the header, there are four rows of input fields:

- Vendor Company: Hillview Staffing Corporation (dropdown menu)
- Status: Distributed (dropdown menu)
- When Visible: 5/1/2020 (calendar icon)
- Max Candidates Per Req: 5 (text input)

At the bottom left, there is a warning icon and the number "0". At the bottom right, there is a "Save" button with a floppy disk icon.

- Select the **Vendor Company** from the drop down
- Optionally, select a **status**: This would be a great option if you have already talked to the Subcontractor and know they have accepted it, you can switch the status to accepted. (see status options below)
- Set **When Visible Date**: This will be the date that the Vendor will be able to see this order if it is still unfilled
 - This is a great option when you want to give your own in house recruiters a chance to fill this order first before the vendors see it
- Enter the **Max Candidates Per Req**: Enter the maximum number of employees they can submit as candidates. This will depend on the number of positions open and number of vendors you have looking at the same order.

Note If you leave Max Candidates Per Req at "0" your vendor will not be able to submit employees as candidates.

5. Select Save

Drag a column header here to group by that column.			
Vendor Company	Status	When Visible	Max Candidates Per Req
Hillview Staffing Corpo...	Distributed	5/1/2020	5

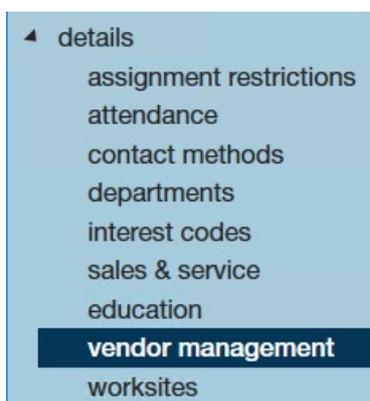
Vendor Statuses:

- **Waiting For Distribution:** If you are waiting a few days to distribute an order, you can still set it up to distribute on a specific date but use the waiting for distribution status to show that the vendor has not received this order yet.
- **Distributed:** This means the order has been distributed to the Vendor who can now review the details and choose accept or decline
- **Accepted:** Once a Vendor contact chooses Accept option on an order, the status of the vendor will change to accepted. They will now be able to review the order details and begin submitting possible candidates.
- **Declined:** If a vendor reviews an order and chooses not to submit any candidates they can decline the order. When they decline, they will be able to select a reason which will change the declined status. This is good for reporting.

How to Distribute All Future Orders From A Customer

Maybe your working with a government contract or with a major supplier where you will need help from your Subcontractor to fill lots of orders from the same customer. You have the option of setting up Subcontractor Vendors on the customer record to have them automatically distribute future orders.

1. Navigate to the customer you want to add the vendor to
2. Select Details > Vendor Management



3. Select the + in the upper right to add a vendor to this customer

4. Enter the following:

The screenshot shows a 'vendor management' interface with a blue header. Below the header are several input fields: 'Vendor Company' (Hillview Staffing Corporation), 'Job Title' (General Laborer), 'Order Delay (Hours)' (5), and 'Max Candidates Per Req' (20). Below these is a section for 'Order Types for Vendor' with two columns: 'available' and 'selected'. The 'available' column lists: A - Applicant, DH - Direct Hire, DP - Daily Pay / Labor, PR - Payrolled, and SC - Scheduled Orders. The 'selected' column lists: TE - Temp and TF - Temp To Full-Time. There are arrows between the columns for moving items. At the bottom right, there are 'Save' and '+ New' buttons.

- **Vendor Company:** Select the vendor from the drop down
- **Job Title:** Optionally, select the specific job title that this vendor would fill
 - This allows you to limit your vendor to only automatically being distributed on orders with a specific job title
- **Order Delay:** Enter the number of hours after the order is created that the vendor will be notified of the new order
- **Max Candidates Per Req:** Enter the maximum number of candidates that the vendor can submit to any order
 - This option can be edited on each order if necessary later
- **Order Types for Vendor:** Select from the list of available order types which types of orders the vendor will automatically be distributed to
 - For example, if you want the vendor to automatically have the option to work on Temp orders but direct hire orders you may not need help with, you can pick and choose the order types from the list.

5. Select Save to finish or + New to add another vendor option

Drag a column header here to group by that column.

Vendor Company	Job Title	Order Delay (Hrs)	Max Candidates Per Req
Hillview Staffing Corporation	General Laborer	5.00	20

Note If you want your vendor to be distributed automatically to a few different job titles, etc. you can add the vendor under the vendor management section of the customer's record more than once.

Keep in mind once you add the vendor to the customer record, it will only automatically distribute on future orders. Orders that already exist will need to have the vendor manually added to each order.

Note If you leave Max Candidates Per Req at "0" your vendor will not be able to submit employees as candidates unless otherwise updated directly on the order record(s).

Note If you do not select any job order types the vendor will not be distributed to any (future) orders regardless of any other criteria added. Therefore, at least 1 order type must be selected from the available options.

The screenshot shows the 'vendor management' interface. The form includes fields for Vendor Company (AnSuLa Staffing), Job Title, Order Delay (Hours) (24), and Max Candidates Per Req (10). The 'Order Types for Vendor' section has two panes: 'available' and 'selected'. The 'available' pane shows a list of job order types: A - Applicant, DH - Direct Hire, DP - Daily Pay / Labor, PR - Payrolled, SC - Scheduled Orders, TE - Temp, and TF - Temp To Full-Time. The 'selected' pane is empty and contains a red box with the text 'Is left blank / no job order types are added'. The interface also has 'Save' and '+ New' buttons at the bottom.

If you're working with a few subcontracted vendors, you can add multiple vendors to a customer record and they will distribute orders based on the criteria saved. You can have multiple vendors working to fill one order for you.

What Information Shows to the Vendor?

Below, we will walk through the information that transfers from the Order Record to the Vendor Web Portal.

Order Statuses

Every order status has an equivalent in Enterprise to ensure your users can see the same information that the Vendor sees.

To See When a Vendor has Accepted or Declined an Order Request:

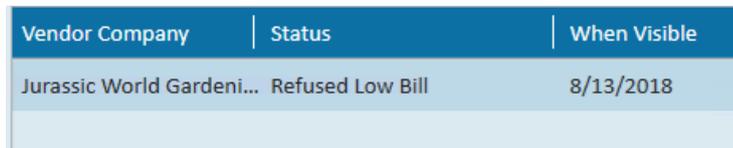
1. On the order record, navigate to Details
2. Select Vendors
3. Current Status will be shown next to each Vendor



The screenshot shows a sidebar menu on the left with the following items: visifile, details (expanded), adjustments, attendance, interest codes, invoice recipients, education, po setup, required documents, and vendors (highlighted in dark blue). The main content area displays a table with the following data:

Vendor Company	Status	When Visible
ACME Staffing Inc.	Distributed	3/13/2020
Jurassic World Gardeni...	Accepted	3/12/2020

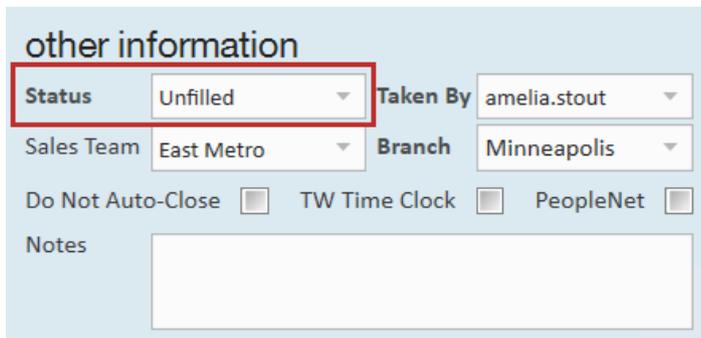
If they refused the order, the status will reflect the reason selected:



Vendor Company	Status	When Visible
Jurassic World Gardeni...	Refused Low Bill	8/13/2018

Filled & Closed Status:

The filled status for an order is when the number of employees assigned is greater than or equal to the number required. The status will switch to filled and is found in the bottom right corner of the order:



The screenshot shows the 'other information' section of the order record. The 'Status' dropdown menu is highlighted with a red box and is currently set to 'Unfilled'. Other fields include 'Taken By' (amelia.stout), 'Sales Team' (East Metro), and 'Branch' (Minneapolis). There are also checkboxes for 'Do Not Auto-Close', 'TW Time Clock', and 'PeopleNet', and a 'Notes' text area.

This status can also switch to Closed to indicate that the order is finished.

Order Details

When a Vendor Contact views the details on an Order request. Those details come from the Order Record. Here we will review the sections of information and discuss configuration options.

Job Information

What the Vendor Sees:

Warehouse Worker

Trees & Leaves • Primary Department • Primary Worksite

Order 4295092487 (Unfilled)

Accept

Job Info	Shift: 2nd Shift	Date Created: 3/12/2020	Job Description: Will be needed for at least 3 weeks helping with assembly and organization in the warehouse. Need to be able to lift 30 lbs.
Employees	Start Time: 2:00 PM	Order Type: TE	
Candidates	End Time: 8:30 PM	Start Date: 6/1/2020	
Contacts	Duration: Indef	Est End Date:	
Directions	Pay Rate: \$19.00/hr	Assigned: 0	
	Safety Notes: hard hats provided	Candidates Submitted: 0 of 20	
		Dress Code: jeans without holes and close toed shoes	

What information pulls from Order Details:

Order Details	Web Options	ACA Surcharge							
customer information		financial details							
Customer ID	4295013638	Work Site	Primary	Multiplier	1.25	Pay Periods	52		
Worker Comp	MN3119		123 Leaf St Shorewood, MN 55:	Bill Rate	\$28.50	Pay Rate	\$19.00		
Alt Order ID		Burden	Burden 3%	Unit Bill Rate	\$0.00	Unit Pay Rate	\$0.00		
Directions				OT Factor	1.5000	Other Agency Pay	\$0.00		
job information				Overtime Bill	\$42.75	Overtime Pay	\$28.50		
Required	10	Assigned	0	Doubletime Bill	\$57.00	Doubletime Pay	\$38.00		
Order Type	TE Temp			Overtime Plan	PlanSTD	GP Percent	25.73%		
Job Title	Warehouse Worker			Desired GM %		GP Estimate	\$1,173.21		
Description	Will be needed for at least 3 weeks helping with assembly and organization in the warehouse. Need to be able to lift 30 lbs.			contacts					
Dress Code	jeans without holes and close toed shoes			No Records Found					
Safety Notes	hard hats provided			other information					
Start Date	6/1/2020			Status	Unfilled	Taken By	amelia.stout		
Duration	Indef			Sales Team	East Metro	Branch	Minneapolis		
Est. End Date				Do Not Auto-Close	<input type="checkbox"/>	TW Time Clock	<input type="checkbox"/>	PeopleNet	<input type="checkbox"/>
Shift	2nd Shift			Notes					
Start Time	2:00 PM	End Time	8:30 PM						
Shift Notes									
☐ Sun ☒ Mon ☒ Tues ☐ Wed ☒ Thu ☒ Fri ☐ Sat									

Includes: Number assigned, order type, job title, dress code, safety notes, start date, duration, est. end date, shift name, start time, end time, and pay rate.

Fields to Clarify:

- **Job Description:** If there is a public job description, by default the public job description option will fill into the

job description field in WebCenter. If there is no public job description then it will display the job description under details. (There are configurations to change this if you would prefer the regular job description)

- **Candidates Submitted:** Will only show the number of candidates submitted by that Vendor (not total candidates on the candidate worksheet). The total number of candidates they can submit comes from the vendors section of the order.

Drag a column header here to group by that column.

Vendor Company	Status	When Visible	Max Candidates Per Req
ACME Staffing Inc.	Distributed	3/13/2020	5
Jurassic World Gardeni...	Accepted	3/12/2020	20

- **Order Id:** Located in the upper right of the WebCenter Portal is an order Id number. This is the same as the Order Id found in the Avatar of the order record and can be used to help clarify which order a vendor may be asking about.

Employees

What the Vendor Sees:

This section pulls information from the [Candidate worksheet](#) on the Order record. Candidates will only display here if they are employed by the Vendor.

Contacts

What the Vendor Sees:

Warehouse Worker

Trees & Leaves • Primary Department • Site 100 Worksite

Order 42

Job Info		Name	Phone #
Employees	Supervisor	Ash Timber	621/123/4568
Candidates			
Contacts			
Directions			

This section pulls in contact information from the Contact Roles Section on the Order Record.

Name	Description	Office Phone
Timber, Ash	Supervisor	621/123/4568

There is a configuration in WebCenter to change whether this displays to your Vendor.

Directions

What the Vendor Sees:

Warehouse Worker

Trees & Leaves • Primary Department • Primary Worksite

Job Info	Address:
Employees	123 Leaf St Shorewood, MN 55331 - Google Maps
Candidates	Directions:
Contacts	
Directions	

This information comes from the worksite and directions fields on the order details page:

Order Details		Web Options	ACA Surcharge
customer information			
Customer ID	4295013638	Work Site	Primary
Worker Comp	MN3119		123 Leaf St
Alt Order ID		Burden	Burden 3%
Directions			
job information			

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