Beyond - Utilizing Master Orders

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What is a Master Order?

Master orders are ideal for customers who consistently request candidates for the same type of position. The master order allows your organization to quickly create records and focus on presenting candidates; they can be made to exact specifications and be copied over and over.

This Article Covers:

- 1. Creating a Master Order
- 2. Locating Master Orders
- 3. Copying Master Orders

Creating a Master Order:

Begin by creating a job order that includes the consistently standard information the customer requests for this type of job order. Things like worksite, job title, job description, safety notes, financial details, and notes should all be entered.

Note Information added within the PO setup and interest codes pages can also be added to the master order. This information will pull into job orders when the master is copied.

Note Do not enter a start date on the master order as every time the order is copied, a new start date should be entered (we do not want the start date on the master to copy over into new orders). For this same reason, users may not want to enter shift information on the master order if all shifts are staffed.

Once the information has been added, update the "Status" to "Master" by navigating to Job Order > Details > Other Information > Status > "Master" > Save Status:

| < Customer Ser | ● 🛃 🛕 ☴ 🚫 🖺 Ц : | | |
|--|--|---|--|
| Bookmarks A | VISIFILE DETAILS V CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUST | OM DATA ASSIGNMENTS DATAFRENZY JOB ORDER PAGE | Change Status × |
| Recent History A Old Ed's Sod Details / 4295 | V Job Information | | Feel free to use any of the following actions, and then save the new status. |
| Old Ed's Sod Visifile / 42950 | V Job Board Options | | ACTIONS |
| | V Time Clock | | |
| | V Financials V Contact Roles | | |
| | ✓ Interest Codes | SAVE STATUS | |
| | Other Information | | |
| | Status Unfilled > | Branch BranchID 0 | |
| | Taken By joshua.kramer | Sales Team None | |
| | Prevent from Auto Closing No | Notes | |

Locating Master Orders

Once your master orders have been created, you can search for them by conducting an advanced job order search based on the "Order Status" of "Master":

| | BASIC | ADVANCED |
|--|---------------------|-------------------|
| E Click to select a saved search | | ^ |
| NOT AND CR Job Order Status + RULE / GROUP | V EQUALS V Master V | Show in results X |
| SAVE | | RESET SEARCH |

The search will return all job orders that have a status of "Master":

| BASIC | | | | | | ADVANCED | | | | | |
|-------|-----------------------------------|------------------------|------------------|----------------------|----------------|----------|-----------|------------|------------------|--------------------|-------------|
| | E Click to select a saved search | | | | | | | | | | ^ |
| | | | | | | | | | | | × |
| SAVE | SAVE RESET SKARCH | | | | | | | | | SEARCH | |
| | ı returned 219 resu ler Status | lts | | | | | | | | | ⊎ |
| | Job Order Id 🔸 | Customer Name | Department Name | Job Title | Job Order Type | Pay Rate | Bill Rate | Start Date | Job Order Status | Positions Required | Positions F |
| | 4295134733 | Advance Employment | Primary | Account Rep. II | TF | 15 | 20.55 | 4/17/2022 | Master | 1 | 0 |
| | 4295134619 | TB 12 Construction Com | p Tight Ends | Convention Attendant | TE | 20 | 30 | | Master | 1 | 0 |
| | 4295124442 | Sasquatch Steel | Constr. | Construction Worker | TE | 25 | 36.25 | | Master | 1 | 0 |
| | 4295124361 | Skates-a-Hoy | Corporate Office | Programmer | TF | 0 | 0 | | Master | 1 | 0 |

Note If your database has large number of master orders in the system, you can narrow the search results by entering a customer name as well.

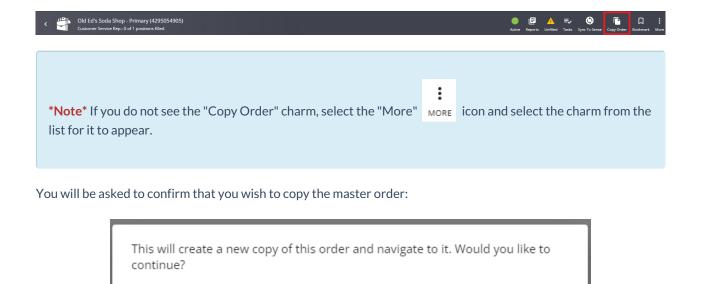
If you plan on copying master orders frequently, the best practice is to add "Master Order" search to your saved searches for the convenience and speed of finding master orders.

Copying Master Orders

Begin by finding the master order you would like to copy, either by the joborder record itself, or via an enhanced search.

Once the master order has been identified, navigate to the job order record, and select the "Copy Order" charm





NO

YES

Selecting yes will copy the job order with the following exceptions:

- The required number of the new order will default to "1".
- The status of the new order will default to "Unfilled".

Related Articles