Front Office Activity Guide

Welcome to the Front Office Activity Guide. In this guide, we will guide you through different exercises to put your TempWorks knowledge to the test.

**Keep in mind this activity guide is designed for a test system. Always consult with your manager or team before updating anything in a live system.**

**Software included in this guide:**

* [Enterprise](http://kb.tempworks.com/help/appstempworkscom-workarounds) – TempWorks’ computer application based full front and back office software
* [Beyond](http://kb.tempworks.com/help/beyond---how-to-log-in) – TempWorks’ browser based front office software for use on your computer and mobile device
* [HRCenter](http://kb.tempworks.com/help/hrcenter-overview) – TempWorks’ online application and on-boarding software

This workbook is first separated into three different levels of knowledge:

Levels

[Level 1: The Basics 2](#_Toc23490991)

[Level 2: Intermediate 4](#_Toc23490992)

[Level 3: Advanced 6](#_Toc23490993)

Each level is separated into major record types: Employee, Customer, Order, & Assignment.

**Instructions:**

* This guide has been designed so you can fill it out electronically or print it out for your convenience. Check off each item as you complete them in the TempWorks Demo system
* There are spaces to enter names/IDs to help you remember which records you created
* The brainstorming questions at the end of each record section are made to help you think about different scenarios. There can be multiple correct answers to each of these questions, so we recommend discussing them with your team or other coworkers.
* Most items can be done in either Enterprise or Beyond unless otherwise specified.
* \*Keep in mind some items are marked with a \* to indicate they have to do with email functionality. Currently email functionality is only available in Enterprise. If you send an email to a real email address, it will send it from our demo system. We recommend using a fake email (ex. amy@xip.xom) when creating or updating contact info in our Demo system.

# Level 1: The Basics

Welcome to the first level of our activity guide. This will guide you through some of the basic level information including creating records, logging messages, and basic searching.

**Employee Record**

[ ]  You have new applicants ready - Create 2 new employee records manually in Enterprise or Beyond:

* Include 3 interest codes and at least 1 work history item
* They completed onboarding, set their washed status to familiar

For future reference, document the employees you created here:

**Employee #1 Name:**

**ID:**

**Employee #2 Name:**

**ID:**

[ ]  A third employee emails you a resume, add them in the system:

* Review the information (including work history) entered
* Set their washed status to familiar
* Make sure the record has at least one interest code

For future reference, document the employee you created here:

**Employee #3 Name:**

**ID:**

[ ]  In an interview, employee #1 lets you know they are allergic to the materials used at one of your customers. Document that the employee cannot work for that customer.

[ ]  Employee #1 called in and said they are available to work – How will you document this?

***Brainstorm:*** Besides updated washed status, what other things might you update when an employee has completed onboarding?

**Customer Record**

[ ]  A new customer has signed a contract - Create a new customer record

* Make sure to enter an address
* Set their status to active

For future reference, document the customer you created here:

**Customer #1 Name:**

**ID:**

[ ]  Create a contact for Customer #1

* Enter a title for the contact (ex. CEO, Supervisor, etc.)
* Include at least one way to contact them (phone or email\*)

For future reference, document the contact you created here:

**Contact #1 Name:**

**ID:**

[ ]  Customer #1 sends you information on their main location that they will need people for – where do you enter this address?

[ ]  The customer’s contract stated a negotiated mark up or multiplier code – enter this in the system

***Brainstorm:*** Once a customer has signed a contract with you, what things might you add to the customer record?

**Order Record**

[ ]  Create a new order (for Customer #1)

* Select a Job Title & description
* Number of people required to at least 2
* Enter a start and end time
* Enter a pay rate

[ ]  Add Contact #1 to the contact roles section of the new order created

***Brainstorm:*** How do you search for your unfilled and active orders? What kinds of criteria might you search by? Can you save your search?

 **Assignment Record**

[ ]  Find an unfilled order (if you created the order above, use that)

[ ]  Search for employees by interest code that would be related to the unfilled order

[ ]  Assign at least 2 employees

[ ]  One of the employees you assigned can’t start on the ideal start date, change their start date to the next day on the assignment & log a message

[ ]  One of the employees you assigned is going to be paid $2 more than the amount listed on the order, make this adjustment on the assignment

***Brainstorm:*** How can you find all employees currently assigned to a customer?

# Level 2: Intermediate

Welcome to level 2. Here we will move beyond the basics of each of our main record types and work in additional functionality including posting to job boards, using HRCenter, managing statuses and utilizing candidate worksheets.

**Employee Record**

[ ]  Employee #2 called in and said they are available to work – enter this in the system

[ ]  Employee #3 needs to fill out a new W4 – assign one for them to fill out online

[ ]  Employee #1 sends you a new resume – save it on their record

[ ]  Interview an employee and fill out the interview questionnaire (Enterprise Only) or add a new item to the employee’s story tab *(Beyond only)*

[ ]  Pretend to be a new applicant and apply via HRCenter (ask your admin or manager for the HRCenter URL)

For future reference, document the employee you created here:

**Applicant Name:**

 **Username:**

 [ ]  Search for the new employee record in Enterprise or Beyond that you created by filling out the HRCenter application

[ ]  Search for an employee by Zip Code, work history, and/or washed status

[ ]  An employee calls you to tell you they are moving away – what can you do to make sure they don’t show up in active searches?

***Brainstorm:*** Do you need to have more than one HRCenter application? Besides the default information pages, what other options do you have for pages in your application? What are the benefits of using HRCenter vs. having a paper application?

**Customer Record**

[ ]  Add 2 new customer records

For future reference, document the customers you created here:

**Customer #2 Name:**

**Customer #3 Name:**

**ID:**

**ID:**

**To Customer #2: A Prospect**

 [ ]  Add 2 contacts

 [ ]  You are going to have a sales meeting with one contact, log a message

 [ ]  Update the sales pipeline status

 [ ]  Enter How Heard of Details

**To Customer #3: A Signed Customer**

 [ ]  Add 2 worksites

 [ ]  This customer has signed a contract, set their status to active & log a message

 [ ]  Add a supervisor contact

 [ ]  Enter the markup (multiplier) that was agreed upon in the contract

 [ ]  This customer always has an AM and PM shift, set them up on the customer record

 [ ]  Select the appropriate worker comp code for this customer

 [ ]  Attach the signed contract to the customer record

***Brainstorm:*** How do you search for all your prospect customers? What other customer search criteria might be helpful?

**Order Record**

[ ]  Create an order (for Customer #3)

* Attach the email or order request form to the Order
* A background check is required for this order, where do you enter that information?
* Make sure all necessary information is filled in

[ ]  Post this job to the TempWorks JobBoard

[ ]  Search for all unfilled and active orders in a zip code

[ ]  A customer cancels an order, change the status of the order and log a message with the reason

[ ]  Search for all unfilled orders with a specific job title

***Brainstorm:*** How could you use interest codes on an order? What about required documents?

**Assignment Record**

[ ]  Search for an unfilled order

[ ]  Search for employees for the order you found

* Try searching by zip code, interest code, and/or past job

[ ]  Find 4 employees that might be a good fit for the order and set them as candidates on that order

[ ]  You interview the 1st candidate and they are a good fit, change their candidate status to customer interview

[ ]  You call the 2nd candidate and they are not interested, change their candidate status to refused

[ ]  You call the 3rd candidate and they are such a great fit that you are ready to assign them, go ahead and assign the employee

[ ]  Sort the candidates by status

[ ]  The 4th candidate does not answer the phone, so you leave a message, log it on their record

***Brainstorm:*** Create 3 searches that might be helpful when looking for the right candidates for a job. Save at least one of them. What kinds of criteria are helpful for you?

# Level 3: Advanced

Welcome to the third and final level of this front office activity guide. This section will wrap up our learning by incorporating some more advanced topics including reporting, mass updates, departments, and more!

**Employee Record**

If you do not add or edit employee records, you can skip to the next section.

[ ]  An employee walks in and said he just moved back and is ready to work for you again, search for an inactive employee record and reactivate it.

[ ]  Search for all assigned employees who do not have an I-9 on file, assign an I-9 document to one

* You may need to first give them web user credentials
* Navigate to HRCenter to fill out the I-9 as the employee
* Return to Enterprise or Beyond and complete the signing of the I-9

[ ]  Reprint an employee’s paycheck stub

[ ]  Create a new employee record with the resume parser

For future reference, document the employee you created here:

**Employee #4 Name:**

**ID:**

[ ]  Employee #4 is going to be sent to work for a specific customer. Assign a new onboarding workflow for the employee to complete.

***Brainstorm:*** For employee records that are being reactivated, what other steps might they need to go through for the rehire process?

**Customer Record**

If you do not add or edit customer records, you can skip to the next section.

[ ]  Customer #2 has signed a contract, update their sales pipeline status and set them to active

[ ]  Create 2 departments for customer #2, add a supervisor contact to each department

For future reference, document the departments you created here:

**Department #1:**

**Department #2:**

**ID:**

**ID:**

[ ]  Set both departments to active

[ ]  Add a new worksite to department #1

[ ]  Add a new shift to department #1

[ ]  Add a PO Number for department #2

[ ]  Add a new job description for department #2

[ ]  Email a contact you created for customer #2\*

[ ]  Send a new copy of an invoice to a customer

***Brainstorm:*** When should you use a department vs. just adding a worksite?

**Order Record**

[ ]  Create an order for department #1, select the new worksite, default shift, and add an interest code

[ ]  Post the order created on the TempWorks Job Board with a public job description

[ ]  Create a Direct Hire Order for department #2, select the job title you used to create the default job description and add the PO number

[ ]  Create a Master Order for customer #2 (Enterprise Only) and copy it to create a new order

[ ]  Search for a filled order and email the assigned employees about when to report the next day\*

***Brainstorm:*** How can you audit your order records to make sure they all have job descriptions, pay rates and bill rates properly entered?

**Assignment Record**

[ ]  Fill a direct hire order and fill in when the amount should be billed.

[ ]  Search for unfilled, active orders. Choose an order:

* Add 3 candidates to the order
* Assign 2 of them

[ ]  The rates on the order you just picked has the wrong rates, update the rates for all the current assignments

[ ]  A contact calls to let you know they no longer need employees from one order. Find the order and end the assignments for all the employees.

* 1 employee did fantastic work, document it
* 1 employee did not work well with the supervisor, document it

[ ]  One employee gets a raise that will start on Monday, document the raise on their assignment

***Brainstorm:*** What are different ways you can find all active assignments for a specific customer or department?