Work Records

Creating and Storing Order Templates: Overview

Overview

Use templates to maximize your efficiency in using WorkRecords. Templates are pre-defined order confirmation "guides" that you create when you have the same job to fill repeatedly for a buyer. Templates can be created for any unique combination of selling location, customer, job title, bill/pay rate and primary workplace buyer contact. Templates are stored by selling location and customer.

Getting Started

1. After logging into WorkRecords at www.WorkRecords.com, choose **Orders> Create Templates** from the menu.

   This will take you to the Order Wizard, a 6-step process for creating a template. You will create and store a template on step 5 of this process.

   *If, at any point in this process, you need to go back a step to add/change information, click on **Previous Step**. Do NOT use your browser's Back button, as this may cause data errors.*
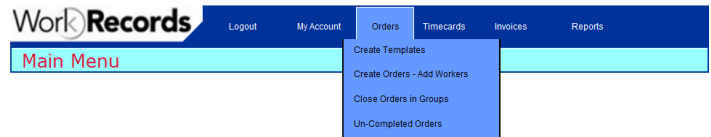
2. On **Step 1, Select Selling Location**, use the Location tree to select the location from which this order is being sold. Click the plus (+) signs next to each level to find your selling location.

   It is very important to choose the correct selling location, because different selling locations may contain different rules about sales tax, overtime factors, week ending dates, and other items.

   Once you select a location, your choice will be populated in the Summary box in the top left corner of the screen. If you do not want the box displayed, just click on it to close.
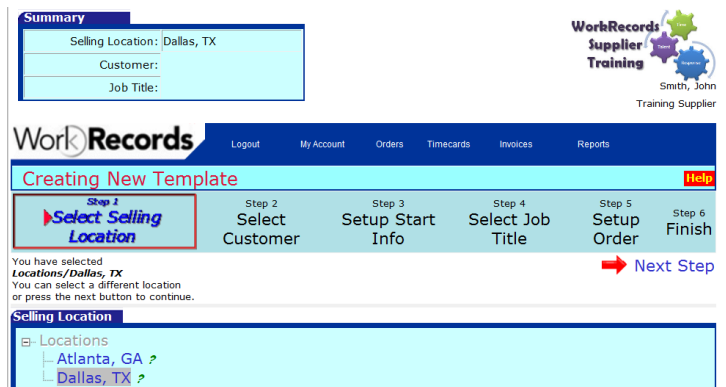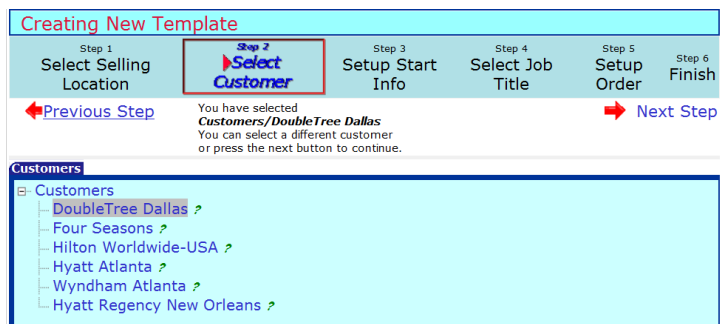
3. On **Step 2, Select Customer**, use the Customer tree to select the correct client for this order. Click the plus (+) signs next to each level to select the appropriate Buyer.

   If the customer you are looking for is not available for selection (perhaps because the customer is new), please email support@workrecords.com.

   Once you select a customer, your choice will be populated in the Summary box in the top left corner of the screen.

4. On **Step 3, Setup Start Info**, click on **Next Step** in the upper right hand corner. This feature is currently inactive for new accounts.

Start Information

Step 1 Select Selling Location	Step 2 Select Customer	Step 3 ▶Setup Start Info	Step 4 Select Job Title	Step 5 Setup Order	Step 6 Finish

◀Previous Step   ➡Next Step

As part of WorkRecords' order confirmation process, you can send an automatic "Start Info" email (or print this information) to the worker. This document will contain the the information you complete below, and is helpful when you need to provide information to the worker prior to their first day of work.

Please select one of these options.

Skip this step sending NO Start Info.
:
:

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5. On **Step 4, Select Job Title**, use the job title folder to select the correct title for this order.

This job title is for your internal use, so choose the one that is meaningful to you as the supplier. (Your buyers will never see this job title.) Click the plus (+) signs next to each category to drill into the tree.

Creating New Template

Step 1 Select Selling Location	Step 2 Select Customer	Step 3 Setup Start Info	Step 4 ▶Select Job Title	Step 5 Setup Order	Step 6 Finish

◀Previous Step

Job Title
- ⊟ Light Industrial
  - └ General Labor
- ⊟ Hospitality
  - ├ Banquet Server
  - ├ Cook
  - ├ Housekeeper
  - └ Steward

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6. On **Step 5, Setup Order**, click on the **Skip Contractor Make Template** link under the SS# field.

***Do not enter** SS #. Doing so will create an order, not a template.*

In the screen shot below, notice in the gray box it says "Making Template" where the worker's name would normally appear.

Creating New Order/Template

Step 1 Select Selling Location	Step 2 Select Customer	Step 3 Setup Start Info	Step 4 Select Job Title	Step 5 ▶Setup Order	Step 6 Finish

◀Previous Step   ➡ Next Step

SS#: [   ]   You can enter the Social Security number for an existing
Click HereTo Make Template   worker to add them to the order confirmation, but may
                              not create a new worker from this screen.

Projected Start Date: [   ] 🔲 *
Projected End Date: [   ] 🔲 *
Estimated Hours /week: [   ] *

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7. **Projected Start Date**: Enter any date as a placeholder (it is a required field); however, the date will not carry over to an order.

8. **Projected End Date**: Enter any date as a placeholder (it is a required field); however, the date will not carry over to an order.

9. **Est. Hours/Week**: Enter the estimated workload; this is always an estimate—workers can work more/less hours

10. **Hourly Bill Rate**: Enter the rate you are billing your customer (must enter dollars and cents, i.e. 8.00)

11. **Hourly Pay Rate**: Enter the rate you are paying your worker (must enter dollars and cents, i.e. 8.00); this field is optional and may not be turned on for your company.

Hourly Bill Rate: [   ] *Hourly Pay Rate: [   ] * Burden %: [0]

Shift Hourly Add Ons

Default	Bill	Pay
◉ 1	0.00	0.00
○ 2	0.00	0.00
○ 3	0.00	0.00

Are shift differential amounts to be included with the base hourly bill-rate when calculating the overtime bill amounts? ☑

Are shift differential amounts to be included with the base hourly pay-rate when calculating the overtime pay amounts? ☑

Overtime Setup for this order.

Type	Day #	LVL 1 Cutoff	Pay Factor 1	Bill Factor 1	LVL 2 Cutoff	Pay Factor 2	Bill Factor 2
Weekly		40.00	1.50	1.5	0.00	0.00	[ ]

12. **Burden**: This explains how your company has set up the burden (extra cost) your company may incur above pay rate (e.g., FICA, health insurance); you may or may not be able to edit this field

13. **Overtime Rules**: The configured OT bill/pay rates are revealed; edit the Weekly OT Billing Factor only if it is different than what the default amount reflects

14. **Additional Billing Items**: This allows you to enter the bill and pay rates for additional billable items such as piecework, tips, bonuses or even credits such as meal charges. Choose the item(s) from the list then add bill/pay rates as appropriate.

If your company has not set up additional billing items, the Additional Billing Items section will not appear on your screen

Additional Billing Items
Choose an add-on pay/bill item from the list below, if applicable for this order confirmation.: -Select-
-Select-
31-Perf Bonus Reg - PBR
79-Attendance Bonus - ATT

Notes:
Customer PO/Req #:
Your Sales Order #:
Sales Tax: Tax Exempt - 0.00

Workplace Buyer's Primary Contact for this order: * [Corporate email]
People Supplier's Primary Contact for this order: jsmith@suppliera.com   [Corporate email]
People Supplier's Alternate Contact for this order: [Corporate email]

➡ Next Step

15. **Customer PO/Req #**: Enter your client's purchase order number here if you have it; this field is rarely used.

16. **Your Sales Order #**: Enter your company's job ID or order number here; this field may be optional and is only rarely used

17. **Sales Tax:** This field will default to your company's tax rate for the selling location you chose; this field may be editable

18. **Notes**: Enter any notes you want to submit to the buyer when you send this order

Typically this includes the description of the position you are filling (e.g. Housekeeper or Data Entry) These are revealed on the kiosk

19. **Workplace Buyer Primary Contact**: Enter the corporate email address of the customer contact to be notified of this order.

Please verify the email address before entering - an inaccurate email address may result in the order being invalidated.

20. **Supplier's Primary Contact**: This defaults to the email address of the person creating the order; the field is editable upon use of the template.

21. **Supplier's Secondary Contact**: Enter the email address of anyone else at your company who needs to be notified of this order, if desired.

Click **Next Step**.

22. On **Step 6, Finish**, you can review your template. The Order Info section shows you the order details that will be shared with your buyer once you start using the template. The Additional Info section shows you the order details that are confidential and only displayed to you as the supplier. Gross margin is calculated based on bill rate, pay rate and burden %.

*If any of this information needs to be changed, use the **Previous Step** button to return to prior steps and correct your choices. Do NOT use the Back button on your browser, as this may cause data errors.*

23. Once you are satisfied with your template information, you must complete the following:

- **Buyer Email Confirmation**: Check the check box to confirm the company name and the individual to which the order will be sent. If this information is wrong, use the Previous Step button to go back and correct it.

WorkRecords looks at the email domain (the part after the @) to identify accounts. If you miskey a customer email address, WorkRecords will not recognize it. Thus it is critical that you confirm the buyer information here. If your customer has a WorkRecords account, this Buyer Confirmation will indicate so. If you know that they do have an account, but this box indicates they do not, please confirm that you entered the correct email address.

- **Timecards Submitted By:** Of the four options, you will choose **TIMECLOCK** unless specifically directed otherwise by a
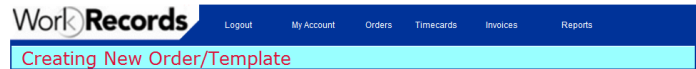
WorkRecords training manager.

— **Timeclock:** whether the worker is punching at a physical kiosk or is logging in from a desktop timeclock, you will choose Timeclock as the method your workers' hours are entered

The other 3 rarely used options are:

— <u>Worker-submit</u>: worker submits their time via an email submitted "honor system" timecard and doesn't punch in

— <u>Buyer-submit</u>: a workplace manager enters the hours "in batch" each week

— <u>Supplier-submit</u>: an inactive option that used to allow a supplier to submit timecards on behalf of workers

24. Enter the name you would like to use for this template. The template saves specific to a selling location and customer and reveals the pay and bill rates entered so you do not need to include those in the name of your template.

25. Click **Save Template**.

26. To create another template, simply go back to **Orders> Create Orders – Add Workers** and start again.

WorkRecords
Supplier
Training
Smith, John
Training Supplier

Work Records   Logout   My Account   Orders   Timecards   Invoices   Reports

Creating New Order/Template

This template has been stored to WorkRecords.

Return To Main Menu

Order Info This information is shared

Order Status:	New Active Order
Workers:	Making Template
	Photo
People Supplier:	Training Supplier
People Supplier Primary Contact:	jsmith@suppliera.com
People Supplier Alternate Contact:	
Workplace Company:	Hyatt Regency TEST
Workplace Buyer Primary Contact:	tmanager@hyatt.com
Planned Work Start Date:	9/4/2012
Estimated Work End Date:	9/4/2013
Estimated Hours/Week:	40
Time Cards by:	
Default Shift:	1
Week Ends On:	Sat
Bill Rate:	$12.00/hr

OverTime:

OT Category	1st OT Hours After	1st OT Bill Factor	2nd OT Hours After	2nd OT Bill Factor
Weekly	40	1.5	0	0

Shifts:

Shift	Hourly Bill Increment
1	0.00
2	0.00

* Factoring shifts in base bill

Add Ons:	None
Schedule Info:	
Customer PO/Req#:	
Sales Tax Rate Applied:	Tax Exempt 0%
People Supplier Sales Order #	
Order Notes:	

Additonal Info This information is NOT shared with your customer

| Pay Rate: | ($1.00)/hr |

OverTime:

OT Category	1st OT Hours After	1st OT Pay Factor	2nd OT Hours After	2nd OT Pay Factor
Weekly	40	1.5	0	0

Shifts:

Shift	Hourly Pay Increment
1	0.00
2	0.00

* Factoring shifts in base pay

Additional Billing Items:	None
Burden % Applied:	0%
Gross Margin % - After Applied Burden:	108.33%

Save this order as a template named: hyat GC

Save Template