

How to Provide Account Information



Supplier Account Information spreadsheet fields		Explanation																		
<table><tr><th colspan="2">Corporate Supplier Contact Information</th></tr><tr><td>Company Name</td><td></td></tr><tr><td>Address 1</td><td></td></tr><tr><td>Address 2 (Bldg, Suite, etc)</td><td></td></tr><tr><td>City</td><td></td></tr><tr><td>State</td><td></td></tr><tr><td>Zip Code</td><td></td></tr><tr><td>Phone Number</td><td></td></tr><tr><td>Web Site Address</td><td></td></tr></table>		Corporate Supplier Contact Information		Company Name		Address 1		Address 2 (Bldg, Suite, etc)		City		State		Zip Code		Phone Number		Web Site Address		<ul style="list-style-type: none">These fields reflect your company’s information. You can either input your local office address and number or your corporate office information.The website field is for either:<ul style="list-style-type: none">A working website addressA secured domain that you use in your email addressesIf you don’t have either of these, simply enter “no website” in the Web Site Address field.
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<table><tr><th colspan="3">Who should receive the monthly emailed invoice from WorkRecords to your company for the use of our software</th></tr><tr><td>First and Last Name</td><td></td><td></td></tr><tr><td>Title</td><td></td><td></td></tr><tr><td>Email Address</td><td></td><td></td></tr><tr><td>Phone number xxx-xxx-xxxx</td><td></td><td></td></tr></table>		Who should receive the monthly emailed invoice from WorkRecords to your company for the use of our software			First and Last Name			Title			Email Address			Phone number xxx-xxx-xxxx			<ul style="list-style-type: none">WorkRecords charges a nominal fee per timecard per week. Once a month, we email that invoice to each supplier. Please include the contact information for the person who needs to receive that invoice.			
Who should receive the monthly emailed invoice from WorkRecords to your company for the use of our software																				
First and Last Name																				
Title																				
Email Address																				
Phone number xxx-xxx-xxxx																				

Workplace Buyer (your customer's) information (information in gray provided by your customer)				
Name of Buyer	Sample Buyer		Billing Contact	AP
Billing Address 1	123 Avenue A		BillingPhone 1	214-555-1212
Billing Address 2			Billing Phone 2	
City	Dallas		Billing Email	ap@samplebuyer.com
State	TX		Invoice Payment Terms for this buyer	
Zip Code	75244		Agree to the WK-ending requirement of buyer? Yes/No	
Buyer Weekending	FRIDAY		Sales tax for this buyer? Yes/No	

- This section outlines the information provided by your customer.
- Invoice payment terms here are for this particular customer – sometimes those vary based on your agreement with your customer.
- On the left hand side, we've included the weekend day your customer has asked you to follow. Please indicate if you agree to this.
- Do you charge sales tax for this customer?

Job Titles, Rates, and Usage Information for Workplace Buyer (when entering rates please use actual dollar amounts as opposed to mark-ups)							
Job Title	Pay Rate	OT Pay Rate	Bill Rate	OT Bill Rate	Department	Volume/Usage	Notes

- We need a complete list of all position types you staff for this customer – Volume/Usage refers to how many workers, how often.
- Please include both regular rates and overtime rates so that we can ensure that your configuration in WorkRecords matches the agreement you've made with your customer.

How many hours must a worker work each week before you begin charging for overtime? (standard answer is 40)		
Are there any positions or types of work that you do NOT charge your customer (eg. training, supervisor, etc.) Yes/No		

- Please give us the number of hours a worker must work in a 7-day workweek before you start billing you customer for overtime.
- If you answer the question about not billing for items with a Yes, a member of the WorkRecords implementation team will follow up for more details.

Shift Differentials (when entering rates include only the amount added to the base rate)				
Do you have any workers that if they work the same position but on a different shift AM, PM, OVNT (or 1st, 2nd, 3rd shifts) that they are paid or billed differently based on the shift that they work? If yes, please complete the table below. If you have more than one job title with shift differential, please include the differentials in the notes field above next to the job title.				
Shift Name	Pay Diff	OT Pay Diff	Bill Diff	OT Bill Diff
AM				
PM				
OVNT				

- Shift differentials are most commonly used in manufacturing environments and involve a worker with the same experience, doing the same work, but paying/billing more based on the shift they work.
- If you have a type of position (or multiple positions) that have shift differential, input at least one positions differentials in this section. If you have multiple positions, please use the notes section in the job title section to indicate the differentials.

Additional Billing Items			
Do you have anything that you charge customers for that are not included in the hourly bill rate? (Water, cleaning by the room, meals, etc.). If yes, please complete the table below.			
Billing Item	Pay Rate	Bill Rate	Notes
Miscellaneous	\$ 1.00	\$ 1.00	Standard for all Suppliers

- This section includes any type of work for which you charge your customer a non-hourly bill rate. For instance, if your worker(s) receive a weekly bonus. Or, if your workers are paid/billed for the number of rooms they clean or items they pack.
- If you have any situations, please include the information in this section – there is one listed as an example.

WorkRecords User Set-up for both WorkRecords software and Quick Guides/Videos access - Please include anyone in your office that may use WorkRecords including management, staffing, payroll and invoicing team members

Last Name	First Name	Title	Email Address	Phone Number xxx-xx-xxxx

- Please include everyone in your office/branch that will need access to WorkRecords such as:
 - Branch Manager
 - Staffing Supervisor
 - Payroll Coordinator
 - Invoice – A/R Manager
 - Executive Management
- You can add as many as you like and can contact our Support Team at support@workrecords.com if you have new members