

Placements & Back Office Interface

Overview


WinSearch offers a combination of features as a result of a Placement Activity. Beyond recording the activity, it may perform these additional tasks:

- Email or notify other WinSearch users that a placement has occurred
- Mark the Job Order as “Filled” or “Closed”
- Update pertinent information on the Job Order record
- Update pertinent information on the Candidate record
- Set up a Termination Warning activity
- Set up a First Day Follow Up activity
- Add the Candidate’s payroll information to the Back Office Interface Table.

Creating a WinSearch Placement Activity

- There are two types of Placement Activities available: **Permanent Placement** or **Contract Placement**.
- The process for creating a Placement Activity is the same, regardless of the type of placement.
 - For a Contract Placement, the options exist to have an additional activity created to warn that a position is going to end and there is a Termination activity to indicate that the assignment has ended.

Creating a Placement

- Click the Create New Activity icon , to bring up a new Activity Record Screen.
 - The Placement activity can be created from the Job Order, the Candidate or the Main WinSearch toolbar.
- From the **Act. Code** drop down list, select the Activity Code designated for Permanent or Contract Placement, depending on the type of placement that it is.
- The **Scheduled Date** is either the date that the agreement is made or the Candidate’s start date, depending on your company’s policy.
- Verify that the appropriate **Activity Links** are present.
 - Candidate, Client Company, Client Contact and Job Order should be linked. Your company can specify which links are required.
- You may notify Staff Reps that the placement has been made.
 - Staff Reps may automatically be included and/or notified based on the Placement Activity Code set up.
- Click **Save & Close** to record the Placement activity.

Creating a Placement Activity Diagram:

1. **Activity Code:** Permanent or Contract Placement

2. **Scheduled Date:** Placement Date or Start Date

The screenshot shows a software interface for entering a new activity record. The form is titled "Activity Records - Enter New Record" and contains several sections:

- Act Code:** Permanent Placement (circled in blue)
- Primary Link:** Smith, Bob
- Subject:** (Empty text area)
- Sched Date:** 7/15/2009 (circled in blue)
- *Resp:** SYSADM
- *Status:** Completed
- Duration:** 15
- Priority:** 1
- Cost \$'s:** \$0.00
- Created:** SYSADM 7/15/2009
- Completed:** (Empty)
- Linked Staff Reps:** A list of names including BJONES, BROBERTS, CRDTMGR, CROTH, GABBY, HELEN, JSMITH, and LAK.
- Activity Links:** A list of links including 672 Software Developer, 500 ABC Company, *5804 Smith, Bob, and 5801 Deans, Michael (highlighted in red).
- Buttons:** Save & Follow-Up, Save & Close (circled in blue), Save, Recurring..., and Cancel/Close.

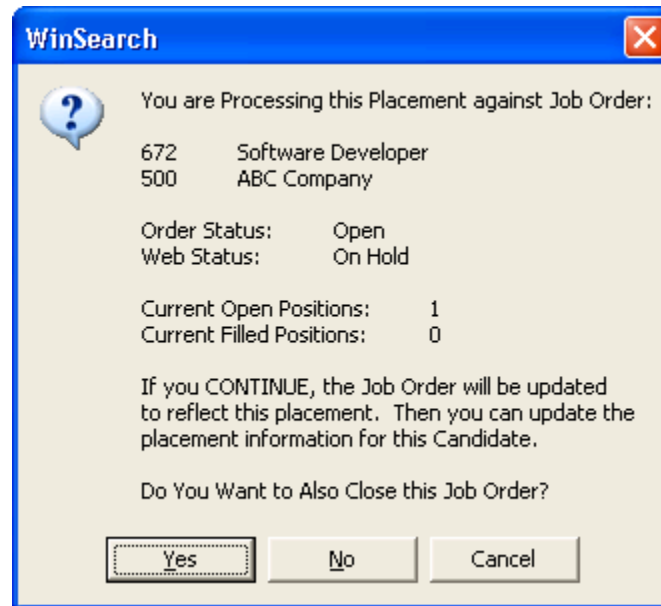
3. **Activity Links:** Candidate, Job Order, Client & Contact

4. **Save and Close:** Records the Placement activity

Updating the Job Order

Up to this point, a placement activity has behaved like any other activity. Now you start seeing some additional functionality come into play.

- Once you hit **Save & Close** you are presented with the following Prompt:



- Select **Yes** to Close the Job Order by updating the Job Order status.
- This will increase the **Number Filled** field on the Job Order by 1.
- Select **No** if you would like to leave the Job Order as is.
 - Typically you will only select No if there are open positions remaining.

Update Placement Data

- After choosing whether or not to close the Job Order, a second screen pops up prompting you to Update Placement Data.
- The Update Placement Screen offers you the chance to update position information for the Candidate.
 - Information filled in on the Job Order will be carried over to the Update Placement Screen.
- Certain fields may be defaulted by the Placement & Termination Settings.
 - WinSearch uses the **Start Date** to create the first day follow up activity, setup in the Placement & Termination Settings screen.
- Hit **Save** when you are finished making updates.
 - Double check your work- you only see the Update Placement Data screen once!
- The Person's Information will be updated along with an entry being added to the Back Office Interface Table.

Update Placement Data Screen

(5806 Deans, Michael) - Update Placement Data

File Edit View

ID 5806 - Deans, Michael

*Company: ABC Company 502 *Report To: Smith, Bob 5805

*Title: Assistant:

Address 1: Category: Employee

Address 2: *Status: Placed

City, *St/Prv: *Type:

Code, *Cntry: *Class:

Phone: (216) 241-6698 Phone
(216) 444-5555 Cell

E-Mail: michaeldeans@hotmail.com

Start Comp\$: \$0 End Date: *Pay Period:

End Comp\$: \$0 *Pay Type: Margin: \$0.00

Placement Fee: \$0 Tax State Worked: Bill Rate: \$0.00

*Back Office Class: Pay Rate: \$0.00 OT Exempt:

Start Date: OT Pay Rate: \$0.00 OT Bill Rate: \$0.00

OT After:

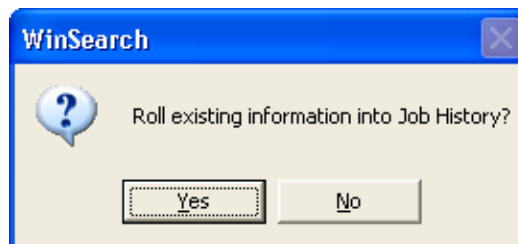
Comments: Placed from Order Number 673

Position Description:

Save

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- Once you hit save on the **Update Placement Data** screen, the following prompt appears:



- This prompt allows you to take the employment information that was on the Candidate record prior to making the placement and roll that into the Job History table.
- This is the final step; the placement is complete!

Placement & Termination Settings

- Prior to successfully recording a Placement activity in WinSearch, certain settings need to be put in place.
- To access the WinSearch Placement & Termination Settings go to **SETTINGS** → **USER OPTIONS** → **PLACEMENT & TERMINATION SETTINGS**.
- These settings are on a user-by-user basis
 - If you set them up as SysAdm, all new users added to the system will inherit those settings.
- Within the WinSearch Placement & Termination Settings you will choose the following:
 - Activity Codes for **Permanent Placement** and **Contract Placement**
 - Activity Code for **Contract Termination** (if applicable)
 - Default **Status, Type, Class** and **Category** entries for Person's records when a Placement or Termination is created
 - Activity settings for **Start Day Follow-up** Activities and **Termination Warning** Activities

Permanent Placement Activity Settings

| | | | |
|--------------------------------------|-------------------|----------------------------------|--------|
| Permanent Placement Activity Code: | Permanent Placeme | *Permanent Person Placed Status: | Placed |
| *Status for Closed Permanent Orders: | Closed | *Permanent Person Placed Type: | |
| *Permanent Person Category: | Employee | *Permanent Person Placed Class: | |

Contract Placement Activity Settings

| | | | |
|-------------------------------------|--------------------|---------------------------------|---------------|
| Contract Placement Activity Code: | Contract Placement | *Contract Person Placed Status: | On Assignment |
| *Status for Closed Contract Orders: | Closed | *Contract Person Placed Type: | Contract Only |
| *Contract Person Category: | Employee | *Contract Person Placed Class: | |

Contract Termination Activity Settings

| | | | |
|--|-------------------|----------------------------|--------|
| Terminate Activity Code: | End of Assignment | *Terminated Person Status: | Active |
| *Order Status Set by Terminate Activity: | Closed | *Terminated Person Type: | |
| Terminated Persons Category: | Contractor | *Terminated Person Class: | |

Placement Followup Activities Settings

| | | | | | |
|------------------------------------|---------------------|---|--|---|----------------|
| Start Day Followup Activity Code: | Call - 1st Day | <input checked="" type="checkbox"/> Auto Create | <input type="checkbox"/> Adjust Date by | 0 | (+/-) Days |
| | | | <input checked="" type="checkbox"/> Set Alarm with | 2 | Days lead time |
| Termination Warning Activity Code: | End of Assignment V | <input checked="" type="checkbox"/> Auto Create | <input checked="" type="checkbox"/> Adjust Date by | 7 | (+/-) Days |
| | | | <input checked="" type="checkbox"/> Set Alarm with | 0 | Days lead time |

Buttons: Save, Restore Defaults, Close

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Permanent Placement Activity Settings

The following settings are available for Permanent Placement Activities:

- **Permanent Placement Activity Code:** Select which activity code indicates a Permanent Placement
 - Note: This activity code must be set up prior to entering it on this screen
- **Status for Closed Permanent Orders:** What the status of the Job Order will become when it is closed.
- **Permanent Person Category:** a default Category for the newly placed Candidate
- **Permanent Person Placed Status:** a default Status for the newly placed Candidate
- **Permanent Person Placed Type:** a default Type for the newly placed Candidate
- **Permanent Person Placed Class:** a default Class for the newly placed Candidate
 - The values selected for Category, Status, Type & Class for the Candidate can be altered on the Update Placement Data screen.

Contract Placement Activity Settings

The following settings are available for Contract Placement Activities:

- **Contract Placement Activity Code:** Select which activity code indicates a Contract Placement
 - Note: This activity code must be set up prior to entering it on this screen
- **Status for Closed Contract Orders:** What the status of the Job Order will become when a Candidate has been assigned to it.
- **Contract Person Category:** a default Category for the newly placed Candidate while he/she is on assignment
- **Contract Person Placed Status:** a default Status for the newly placed Candidate while he/she is on assignment
- **Contract Person Placed Type:** a default Type for the newly placed Candidate while he/she is on assignment
- **Contract Person Placed Class:** a default Class for the newly placed Candidate while he/she is on assignment
 - The values selected for Category, Status, Type & Class for the Candidate can be altered on the Update Placement Data screen

Contract Termination Activity Settings

For Contract Assignments, creating a Contract Termination activity allows you to update the Candidate record again, getting him/her back into your available candidate pool.

The following settings are available for Contract Termination Activities:

- **Terminate Activity Code:** Select which activity code indicates an assignment is terminating.
 - Note: This activity code must be set up prior to entering it on this screen
- **Order Status Set by Terminate Activity:** What the Status of the Job Order will be when the assignment is terminated

- This does not have to differ from the Status that is assigned when you make the Contract Placement activity.
- **Terminated Persons Category:** a default Category for the newly terminated Candidate
- **Terminated Person Status:** a default Status for the newly terminated Candidate
- **Terminated Person Type:** a default Type for the newly terminated Candidate
- **Terminated Person Class:** a default Class for the newly terminated Candidate
 - If you don't want to assign a Status, Type or Class, just leave that field blank.

Placement Followup Activities Settings

There are two types of Follow-up activities that can be created when a Placement is recorded.

- **Start Day Follow-up Activity:** This activity serves as a reminder that a placed candidate is about to start, uses the Start Date of an assignment as its benchmark.
- **Termination Warning Activity:** For Contract Assignments, this activity uses the End Date of an assignment as its benchmark for providing a warning that the assignment is going to end
 - The Termination Warning activity simply warns you that Termination is impending; it does not auto-create the actual Termination activity.

Start Day Follow-Up Settings

- **Activity Code:** Select the activity code you would like assigned to the Start Day Follow-up activity, remember this must be created in the system prior to selecting it on this screen.
- **Auto Create:** Check this off to enable the automatic creation of this activity.
- **Adjust Date By:** Check this box if you would like to adjust the date that the activity is scheduled for- then select the number of days prior to or after the **Start Date** for scheduling.
 - If you want the activity to be scheduled for the actual Start Date, don't check off this box.
- **Set Alarm with:** If you wish to receive an alarm as well, check off this box. Adjust the lead time for the alarm if you would like it to pop up any number of days prior to or after the **Scheduled Date** of the Start Day Follow-up activity.

Termination Warning Activity Settings


- **Activity Code:** Select the activity code you would like assigned to the Termination Warning activity, remember this must be created in the system prior to selecting it on this screen
- **Auto Create:** Check this off to enable the automatic creation of this activity
- **Adjust Date by:** Check this box if you would like to adjust the date that the activity is scheduled for- then select the number of days prior to or after the **End Date** for scheduling.
 - If you want the activity to be scheduled for the actual End Date of the assignment, don't check off this box.
- **Set Alarm with:** If you wish to receive an alarm as well, check off this box. Adjust the lead time for the alarm if you would like it to pop up any number of days prior to or after the **Scheduled Date** of the Termination Warning activity.

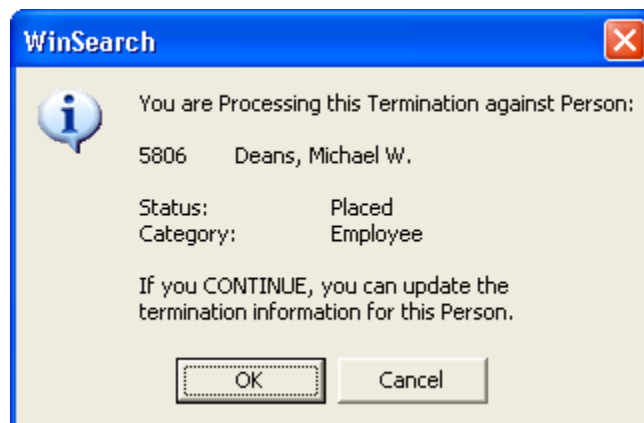
Hit **Save** on the **Placement & Termination Settings** window when you are finished updating this screen.

WinSearch Termination Activity

- Create a Termination activity when an assignment ends, whether it's the agreed upon date, the assignment was extended, or terminated early.
- Creating a Termination Activity is very similar to the process for creating a Placement activity.

Creating a Termination Activity

- Click the Create New Activity icon , to bring up a new Activity Record Screen.
 - The Placement activity can be created from the Job Order, the Candidate or the Main WinSearch toolbar.
- From the **Act. Code** drop down list, select the Activity Code designated for Termination.
- The **Scheduled Date** is the date that the assignment ends.
- Verify that the appropriate **Activity Links** are present.
 - At a minimum there should be a Candidate, Client Company, Client Contact and Job Order linked.
- You may notify Staff Reps that the assignment has been terminated.
 - Staff Reps may automatically be included and/or notified based on the Termination Activity Code set up.
- Click **Save & Close** to record the Termination activity.
- You will see the following prompt for the Termination activity:



- Click **OK** to update the Termination information.

Update Termination Data

- The Update Termination Data Screen offers you the chance to update information for the Candidate that is coming off of assignment, as well as the Job Order.
- Certain fields may be defaulted by the Placement & Termination Settings.
 - WinSearch pulls the **End Date** from the information entered in the **Update Placement Data** screen, filled in when the placement was made.
- Check off the **Roll over Current Position** box if you wish to have the Candidate's Job History table updated immediately.

- Hit **OK** when you are finished making updates.
 - The Person's Information and Job Order data will be updated as indicated.

Back Office Interface Table

- The Back Office Interface (BOI) table contains a combination of Candidate and Job Order data for each placement.
- When you create a placement in WinSearch, a record is added to the BOI window.
- This table often contains the information that your accounting system needs for billing and possibly payroll.
- Access to the BOI table is granted on a user-by-user basis.
- From the BOI table you can create a WinSearch report or copy the information into an Excel spreadsheet.

Accessing the Back Office Interface table

- Go to **PERSONS** → **BACK OFFICE INTERFACE**
- Here you will have a list of all current placements.

Back Office Interface (BOI) Table

| Full Name | Main Voice | Main Fax | Email Addr | Home Address 1 | Home Address 2 |
|------------------------|---------------------------|--------------------------|--------------------------|---------------------|----------------|
| Andrews, Susan B., Ms. | (216) 831-6240 Home Phone | (216) 349-5555 Fax Phone | sandrews@yahoo.com | 25201 Chagrin Blvd | Suite 390 |
| Asumka, George C., Mr. | (216) 727-2241 Home Phone | (216) 329-9250 Fax Phone | gasumka@msn.com | 24233 Lakeside Ave. | Apartment |
| Bengston, Tony, Mr. | (216) 727-2241 Home Phone | (216) 432-5462 Fax Phone | ad@aol.com | 24233 Lakeside Ave. | |
| Bobbo, Bob | | | | | |
| Buskey, Allen J., Mr | (216) 233-4455 Home Phone | (216) 241-2210 Fax Phone | a_buskey@wy.com | 23343 Rockside Road | |
| Castele, John S., Mr. | (216) 339-8678 Home Phone | | casteele@creative.com | 2342 Longwood Road | |
| Deans, Michael W. | (216) 241-6698 Phone | | michaeldeans@hotmail.com | 1234 Main St | |
| Fischer, Pam | (216) 662-5735 Home Phone | (216) 374-8734 Fax Phone | DanielleWilliams@Ea | 5114 Cato Street | |
| Graff, Tom | (216) 543-6543 Main Phone | (216) 341-1789 Fax Phone | ad@aol.com | 24233 Lakeside Ave. | |
| Horvath, Chari | (440) 986-3090 Home Phone | (216) 876-3321 Fax Phone | Chari22@hotmail.com | 8300 Pyle Road | |
| Lee, David A. | (812) 482-5224 Office | | dlee@calldei.com | 727 Poplar Lane | |
| Seldal, Joshua | (612) 373-8114 Phone | | SELDAL@AUGSBURY | 2211 Riverside Ave | |

Go to the **REPORTS** → **STANDARD REPORTS** to access the Back Office Interface report.

- From that window you can either print or preview the report.
- To copy the information to Excel, highlight the records that you would like to include and go to **EDIT** → **COPY**
- Open an Excel spreadsheet and paste the records
 - You can adjust the column settings that are included in the copy/paste. On the BOI table go to **VIEW** → **COLUMN SETTINGS** and make your changes. That way you only capture pertinent information.
 - Save changes to the column settings by going back to **VIEW** menu and selecting, **SAVE WINDOW SETTINGS**.

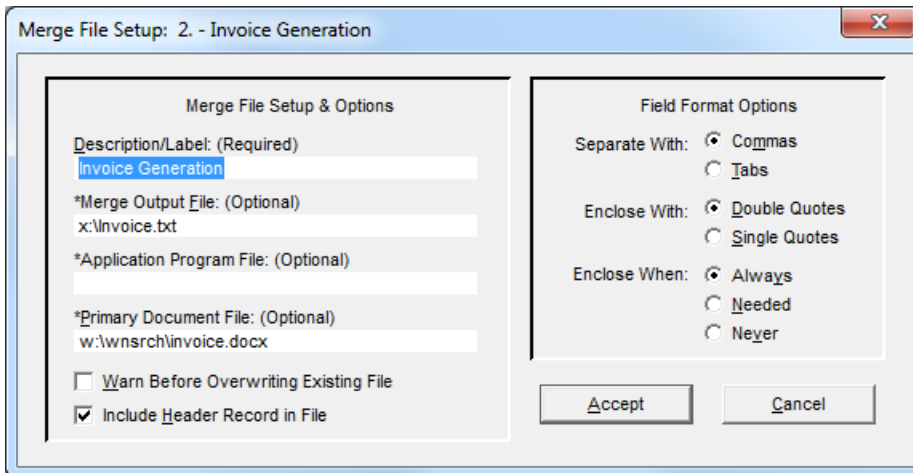
Creating Invoices from the Back Office Interface Table

This has 4 basic steps for setup. Once set up, the day-to-day usage has very few steps.

Step 1: Create a Mail Merge template for Email Blast in WinSearch

- Make a copy of your current invoice in Word and save it with a name and location that you choose for this purpose.
- In WinSearch, select the **PERSONS** → **BACK OFFICE INTERFACE** command and highlight the person whom you want to use in this list. Sorting by Create Date often gets the one you want to the top.
- Select the **REPORTS** → **STANDARD REPORTS** command.
- Select the **Merge File** button.
- Select a number (1 through 9) for this new mail merge under Available Merge File Options.

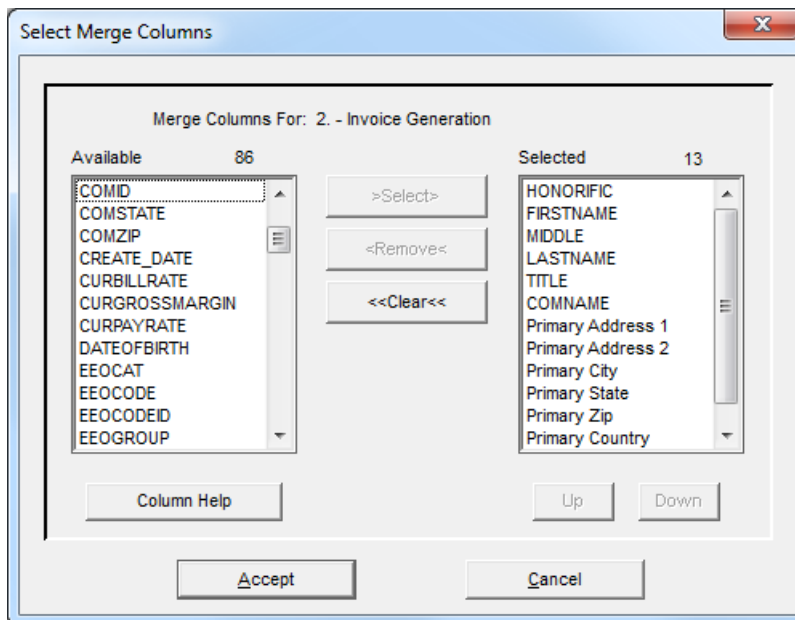
- Select the Setup Options button to see a dialog box like the one shown below:



- In the Description/Label field, type a description (e.g. Invoice Generation).
- In Merge Output File, type a path and filename for where you want to put the resulting data. The file's extension should be .txt. An example might be X:\WNSRCH\Invoice.txt or hit **F2** to browse to create a file.
- In the Primary Document File, press **F2** to browse and select the file that you set up for your mail merge invoice.
- Clear the **Warn Before Overwriting Existing File** check box so you do not get a reminder when the merge data file you are about to create will replace an existing file.
- Choose the **Accept** button.

Step 2: Specify your Columns in WinSearch

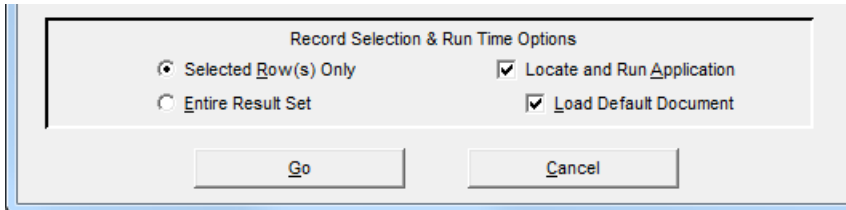
- Select **Specify Columns** in the **Create Merge File Options** dialog box.



- Choose the entries that you want available in the mail merge. Think of the entries you have on your current invoice. Entries that you might want to include are: At a minimum, you need

PrimaryEmail. You may also want to include **FIRSTNAME, LASTNAME, COMNAME, TITLE, MNGRNAME, ORDBILLADDRESS_1, ORDBILLADDRESS_2, ORDBILLCITY, ORDBILLSTATE, ORDBILLZIP, PLACEMENT_FEE** and **START_DATE.**

- Choose **Accept** once you have selected all the appropriate fields.
- Select **Entire Results Set** in the **Create Merge File Options** dialog box, then select **Go**. You will get a message saying that WinSearch has written a number of records to the merge output file. Select **OK**.

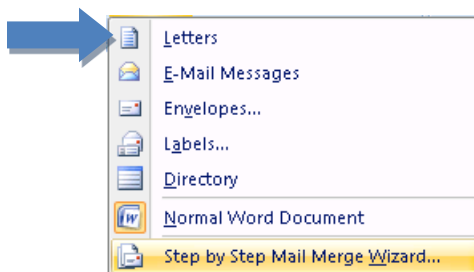
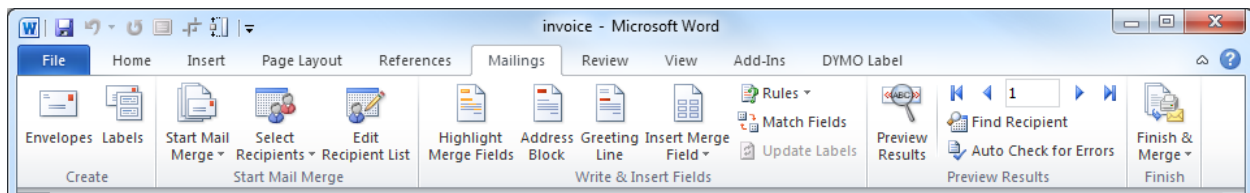


- Open Microsoft Word and open an invoice to use as your master invoice. Use the File | Save As command with a new, blank document or an existing document of the email that you have prepared to send.

Step 3: Complete Merge Setup in Word for Windows

STEP 3 can vary depending upon the version of Word you use. The following steps are for Word 2010.

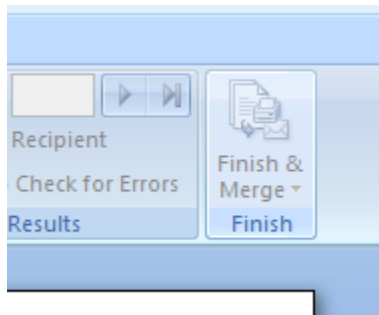
- Switch to the **Mailings** ribbon then click **Start Mail Merge** button then choose **Letters**.



- Choose **Select Recipients** then **Use An Existing List**.
- Choose the data file that you created (it is what you entered as Output Data File in WinSearch) and double-click it.
- Do this for each data item to get from WinSearch:
 - Click on the top half of the Insert Merge Field button then choose the field to add followed by Insert and Close OR Click on the bottom half of the Insert Merge Field button and pick the WinSearch field to drop into place.
- Select the **FILE** → **SAVE** command in Word, and save this file.
- Close Word and return to WinSearch. You are ready to test it out.

Using an Existing Email Blast Mail Merge

- Return to the Back Office Interface and choose the person whom you want to try out this invoice.
- Select the **REPORTS** → **STANDARD REPORTS** command to open the **Standard Report Options** dialog box.
- Select the **Merge File** button to open the **Create Merge File Options** dialog box.
- Select number 1 through 9 for the mail merge settings that you have set up for the invoice generation.
- **Selected Rows Only** to only use the highlighted row(s).
- Select the **Go** button. This creates the merge data file, starts your word processor, and opens the Word document.
- Click on **Finish & Merge** button in the **Mailings ribbon** then choose **Edit Individual Documents**.



Samples of the mail merge document and the results are shown next.

invoice - Microsoft Word

File Home Insert Page Layout References Mailings Review View Add-Ins DYMO Label Design Layout

WinSearch **WS**

INVOICE

WinSearch, Inc.
 1224 Lear Industrial Parkway, Unit A
 Avon, OH 44011
 Main: (440) 937-0872
 Support: (440) 937-0872
 Fax: (440) 937-0862

INVOICE #«ORDID»
 DATE: APRIL 8, 2016

TO «COMNAME»
 «COMADDRESS_1»
 «COMADDRESS_2»
 «COMCITY», «COMSTATE» «COMZIP»
 Attention: «BILLNAME»

SHIP TO «COMNAME»
 «COMADDRESS_1»
 «COMADDRESS_2»
 «COMCITY», «COMSTATE» «COMZIP»
 Attention: «BILLNAME»

| ACCOUNT REPRESENTATIVE | REPLACEMENTGUARANTEE | PAYMENT TERMS | PAYMENT DUE |
|------------------------|----------------------|---------------|-------------|
| «SALES_REP» | 90 days | Net 15 days | 6/15/2016 |

| CANDIDATE | ACCEPT DATE | START DATE | POSITION TITLE | RECRUITMENT FEE |
|-----------------------|---------------|--------------|----------------|-------------------|
| «FIRSTNAME»«LASTNAME» | «CREATE_DATE» | «START_DATE» | «TITLE» | \$«PLACEMENT_FEE» |

Page: 1 of 1 Words: 134

Invoice Erin Madden - Microsoft Word

File Home Insert Page Layout References Mailings Review View Add-Ins DYMO Label Design Layout

WinSearch **WS**

INVOICE

WinSearch, Inc.
 1224 Lear Industrial Parkway, Unit A
 Avon, OH 44011
 Main: (440) 937-0872
 Support: (440) 937-0872
 Fax: (440) 937-0862

INVOICE #931
 DATE: APRIL 8, 2016

TO Apple Computing
 1234 Main Street
 Cleveland, OH 44110
 Attention: Gene Dixel

SHIP TO Apple Computing
 1234 Main Street
 Cleveland, OH 44110
 Attention: Gene Dixel

| ACCOUNT REPRESENTATIVE | REPLACEMENTGUARANTEE | PAYMENT TERMS | PAYMENT DUE |
|------------------------|----------------------|---------------|-------------|
| SYSADM | 90 days | Net 15 days | 6/15/2016 |

| CANDIDATE | ACCEPT DATE | START DATE | POSITION TITLE | RECRUITMENT FEE |
|-------------|-------------|------------|-----------------------|-----------------|
| Erin Madden | 4/7/2016 | 5/1/2016 | Application Developer | \$10,000 |

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