

## Placement Pro Tips: Order and Assignment Tracking

### Creating new Order Statuses, Types and Assignment Performance Codes

Navigate to: Admin Tools > Config Choice

Category	Property	Notes
<b>Order Types</b>		
Order_TempType or Order_DHType	DefaultOrderRateSystemName (Transaction type system name)	This controls the transaction types that populate on the order
<b>Order Statuses</b>		
Order_TempStatus or Order_DHStatus	IsActive (True or False)	Impacts counters and reports that reference active orders
<b>Performance Codes</b>		
AssignmentPerformance_Temp	CountAsAssigned	Controls whether the Assignment counts towards the placed amount on the Order when the Performance Code is logged
	Generate Transaction (True or False)	Controls if the assignment creates a transaction in Time Entry; if the employee should not be paid, set this property to "False"

### Scenario Best Practice

- Log performance codes when ending assignment
- If Customer increases the number of Employees needed or extends the duration of existing assignments that they are needed, create a new order
  - Can Copy Order *and/or* Assignment
- If client has filled positions from another source, denote that with a status
- If an employee needs to be replaced, end their assignment, create a new order where Order Type = Replacement.
- If a Customer wants to place a new order that is identical (or near) to a previous order, copy the order and/or assignment
- If you accidentally assign an employee to an order, that should not be assigned, end the assignment and log a performance code which has the property "CountAsAssigned" set to False
- If an employee does not show up to the job (NCNS), end assignment with a performance code that has the property "GenerateTransaction" set to False.
- Create new Order where Order Type = Replacement.