Best Practice Makes Perfect: Order Management

Presented by

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Order Management

• Order Options
  • Errors are costly!
• Departments
  • Streamlines the order process
• Copy Orders/Master Orders
  • Avoid repeating the same work
• Managing your orders gives useful report data
• Questions
Avionté Order Options
Order Options: WC Codes

1. MN0106 | Tree Pruning, S
2. MN5192 | Amusement Ma
3. MN9016 | Amusement Par
4. MN9180 | Amusement De
Order Options: Markup

- Create Markups on a Customer by Customer basis
  - You can also set them up in Admin Tools if one Markup is to be used across multiple Customers
- Know when to use defaults
### Order Options: Markup

1. **Markup Setup**

   - **Reg Markup**: 1.5
   - **OT Markup**: 1.4
   - **DT Markup**: 1.4

2. **Markup Name**
   - **MarkUp Name**: 1.5 Reg with 1.4 OT
   - **MarkUp Description**: 1.5 Reg with 1.4 OT

3. **Calculation Example**
   - **Pay Rate**: $1.00
   - **Calculate**
     - Pay rate: $1.00
     - OT pay rate: $1.50
     - DT pay rate: $2.00
     - OT bill rate: $1.50
     - DT bill rate: $2.00

4. **Options**
   - **OT pay rate**
   - **DT pay rate**

<table>
<thead>
<tr>
<th>MarkUp Name</th>
<th>RTMarkUp</th>
<th>OTMarkUp</th>
<th>DTMarkUp</th>
<th>IsDefault</th>
<th>OTMarkUpOption</th>
<th>DTMarkUpOption</th>
<th>IsActive</th>
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<td>1.5 Reg with 1.4 OT</td>
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Don’t Forget to Save!
Managing Shifts In Avionté

- Create your Shifts on a Customer by Customer basis
- Add in Breaks!
- Only assign a default if one shift is being used
Managing Shifts In Avionté
Order Options: Job Rate

• Allows Users to set pre-determined parameters for job positions
  • Shift
  • Markup
  • Pay Rates
• Permits rapid entry of orders
Order Options: Job Position

• Create default WorkerComp codes to go with Job Titles
• Speed and accuracy all in one!
• Simplifies Order entry
New Departments

- Streamline order creation
- Have different settings per department
- Keep the customer’s preferences straight
Departments, Sub-Departments, Sub-Sub...

Current Customer:
Walley World Amusement Park: Ride Maintenance

Customer Tree:
- Corporate
  - Groundskeeping
    - Main Park Grounds
    - Parking Lot
  - Landscape
  - Security
  - Ticket Booths

Customer Info:
- Customer Name: Walley World Amusement Park
- Department Name: Ride Maintenance
- Main Address: 26101 Magic Mountain Pkwy Valencia, CA 91355
- Primary Contact #: 2040
- Status: Active

Billing Profile:
- Branch Name: Minneapolis Branch
- Staffing Supplier: ABC Staffing Inc.
- Account Manager: Eli Bateman

Contact Method:
- Type
- Value
- Primary

Message:
- ActionType
- Subject
- Message
- Date
- UserName
- Employee

Users:
- Type
- User
  - Enter By: Eli Bateman
  - Account Manager: Eli Bateman
  - Sales Rep: Melissa Vigdal
  - Service Rep
  - Credit Analyst

Contact Method:
- Type
- Value
Copying Orders

- All Order Options carry over onto New Order
- Still could be missing Skills, Interview, Contacts, Certifications, etc.
- Copy Order takes everything from an existing Order
Copy Order

Make Copy Order a shortcut!

Shortcut

- Edit Order
- View Customer
- Copy Order
- Post Order To Web

Copy Order/Assignment

Order Info
- Customer Name: Walley World Amusement Park
- Department Name: Corporate
- Address: 26101 Magic Mountain Pkwy
- Branch Name: Eagan
- Account Manager: Eli Bateman
- Order Type: TE
- Job Position: Machine Maintenance
- Order ID: 4479
- Status: Open

Order Schedule
- Entered Date: 07/26/2016
- Exp End Date
- Exp Start Date: 07/26/2016

Assignments
- Copy assignment rates from
  - Order
  - Assignment

EmployeeName | CustomerName | DepartmentName | BillRate | PayRate | StartDate | EndDate
---|---|---|---|---|---|---

Cancel | Finish
Replacements: Best Practice

- Overfill existing orders?
- Create new orders?
- Why not just leave the order open?

Bottom line: Think of the Reporting!
- Detailed status=Accurate Reports
- Wonky filled ratios if all are open
## Comprehensive Order AQ

<table>
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<tr>
<th>Customer Name</th>
<th>Order ID</th>
<th>Order Entered Date</th>
<th>Fill Ratio</th>
<th>Fill Ratio Percent</th>
<th>Fill Rate (Hours)</th>
<th>Order Type</th>
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</table>
How would you manage the Order process?

Match the steps to what you think is the best order!

1. A. Create Corporate Level Customer
2. B. Create Customer Departments
3. C. Create Master Order
4. D. Fill Out Order Options
5. E. Copy Order
6. F. Create Replacement Order (if necessary)