Order Processing

In this section, we will go over the process that ***Management*** and ***Admins*** go through after they book an order and the different forms that an order will come in.

Different Forms

- Orders are taken in a few different formats depending on what type of client it is.
    - Email Format (no attachment)
        - This format is the way that our existing ***Corporate Staffing Partners*** submit staffing orders for *events.*
            - There will not be order attached to this email.
                - It is important to read the entire email chain once you receive this order as there may be important information necessary for staffing.
                - Any client who submits orders this way require a roster for their event.
    - ***Invoice*** Format
        - This format found is for ***private events*** from companies that we do not have a partnership with.
            - This order will come in an email and will have the invoice attached to the email order.
                - It is important to read the entire email chain once you receive this order as there may be important information necessary for staffing.
                - No client roster is needed unless stated in order.
    - ***Event Agreement*** Format
        - This format found is for private events from individuals.
            - This order will come in an email and will have the Event Agreement attached to the email order.
                - It is important to read the entire email chain once you receive this order as there may be important information necessary for staffing.
                - No client roster is needed unless stated in order.

Management Processes

- The orders will generally follow the same process no matter which form they come in with a couple of exceptions:
    - Email Format (no attachment)
        - These clients email the orders without an invoice or event agreement.
        - Management will go into their corporate folder and create a new preliminary invoice.
            - This invoice is the initial "idea" of what the billing will be. It will change. according to what the actual hours and expenses end up being.
            - The preliminary invoice gets printed and put in that client's book.
                - Each client has its own billing file and book.
    - Invoice Format
        - These clients receive a preliminary invoice with the order details on it.

- Once signed and paid, the agreement is forwarded to Admin with the hourly rate and notes for processing.
- Event Agreement Format
  - These clients will receive an event agreement.

- Once signed and paid, the agreement is forwarded to Admin with the hourly rate and notes for processing.

- **Admin Processes**
  - All orders are sent to HR and Staffing Managers for scheduling and tracking.
    - HR & Staffing responds to Management email with "got it" to let them know they received it.
    - Hr adds all provided order information to the ***Master Calendar***
      - You can view the calendar **HERE**.
      - The number of ordered staff is added to the appropriate market on the **Event Activity Tab** of the master calendar.
  - Move order to "completed orders" folder in your email.

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- **Event Changes**
  - Cancelled Events Process
    - When an event is cancelled, notification will come via email typically from management, occasionally from the staffing managers.
    - When this happens, HR will go into the master calendar, find the event line, click on the row number, and highlight the entire row.
    - At the top of the screen you will click on the **~~S~~** icon to line through the entire row of the event.
    - You will also highlight the entire row worth of font to **Red** by clicking the **A** next to the **~~S~~** and make sure it is set to red.
    - In the "Event Activity" tab of the Master Calendar, you will go in and subtract the number of staff from that day to keep the daily numbers accurate.

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- Rescheduled Events Process
    - When an event is rescheduled, notification will come via email typically from management, occasionally from the staffing managers.
    - When this happens, HR will go into the master calendar, find the original event line, click on the row number, and highlight the entire row.
    - You will copy the row and then paste into the appropriate line for the new date. Make sure to update information as needed for accuracy including the date and day of the week.
    - If a close date change and the new date is part of the Event Activity Tab, add staff count to the new date.
    - Then you will go back to the original event line & at the top of the screen you will click on the **~~S~~** icon to line through the entire row of the event.
    - You will also highlight the entire row of font to **Green** by clicking the **A** next to the **~~S~~** and make sure it is set to green.
    - In the Event Activity tab of the Master Calendar, you will go in and subtract the number of staff from that day to keep the daily numbers accurate.
    - Forward rescheduled events emails to the staffing manger to assure the most current information is passed along.
- Changed/Updated Events Process

- When an event is changed or updated, notification will come via email typically from management, occasionally from the staffing managers.
- When this happens, HR will go into the master calendar, find the event line & update the needed information.
- If a staff member is cancelled completely, at the top of the screen you will click on the **~~S~~** icon to line through the entire font of that part of the order.
- You will also highlight all changes (additions and cancellations) worth of font and change to **Red** by clicking the **A** next to the **~~S~~** and make sure it is set to red.
- In the Event Activity tab of the Master Calendar, you will go in and update the number of staff from that day to keep the daily numbers accurate.

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- **Order Received by Staffing Manager**
  - The order will come via email.
    - Read the entire email chain as there may be important event information that will need to be put in the announcement that you will build later in the steps.
      - The order will have all the information necessary to build the announcement to staff.
    - Response- "Got it"
      - Reply to the sender of the order email to let them know you received it.
    - Contact client to verify details (Private Events only)
      - Send **Verify Details Email (found in templates)** within 24 hours of the order being received.
      - Call client when you are 7 days away from their event
      - Always call client the day before the event for a final check in
      - CC David on all email communications with the client
- **Prep Work**
  - Schedule
    - Verify that the event has been placed in the **Calendar of Events-Master** Google doc.
    - It is not required but is good practice to have an excel file where you track your events.
      - Your personal file will just have your market events and will be easier to follow. It is also just one more backup in case something gets missed in the Google doc.
  - Event Folder Email
    - Create a folder in your email labeled "Events"
      - Create a subfolder within the "Events" folder.
        - This subfolder will be named as:
          - 1.01.20
      - Create a 2nd subfolder within the "1.01.20" subfolder
        - This 2nd subfolder will be named as:
          - Use the client's name. This will be either a first and last name for private events or a company name
          - Drag the email into the client subfolder
            - Corporate Staffing Partner event format (Corporate Clients are companies that we have an official pricing contract with)
              - CP 1.01.20 Aurora 80013

- Each of our Corporate Staffing Partner clients will have an abbreviation code
- Examples: CP=Centerplate, SD=Serendipity, BBO=Bumblebee Occasions