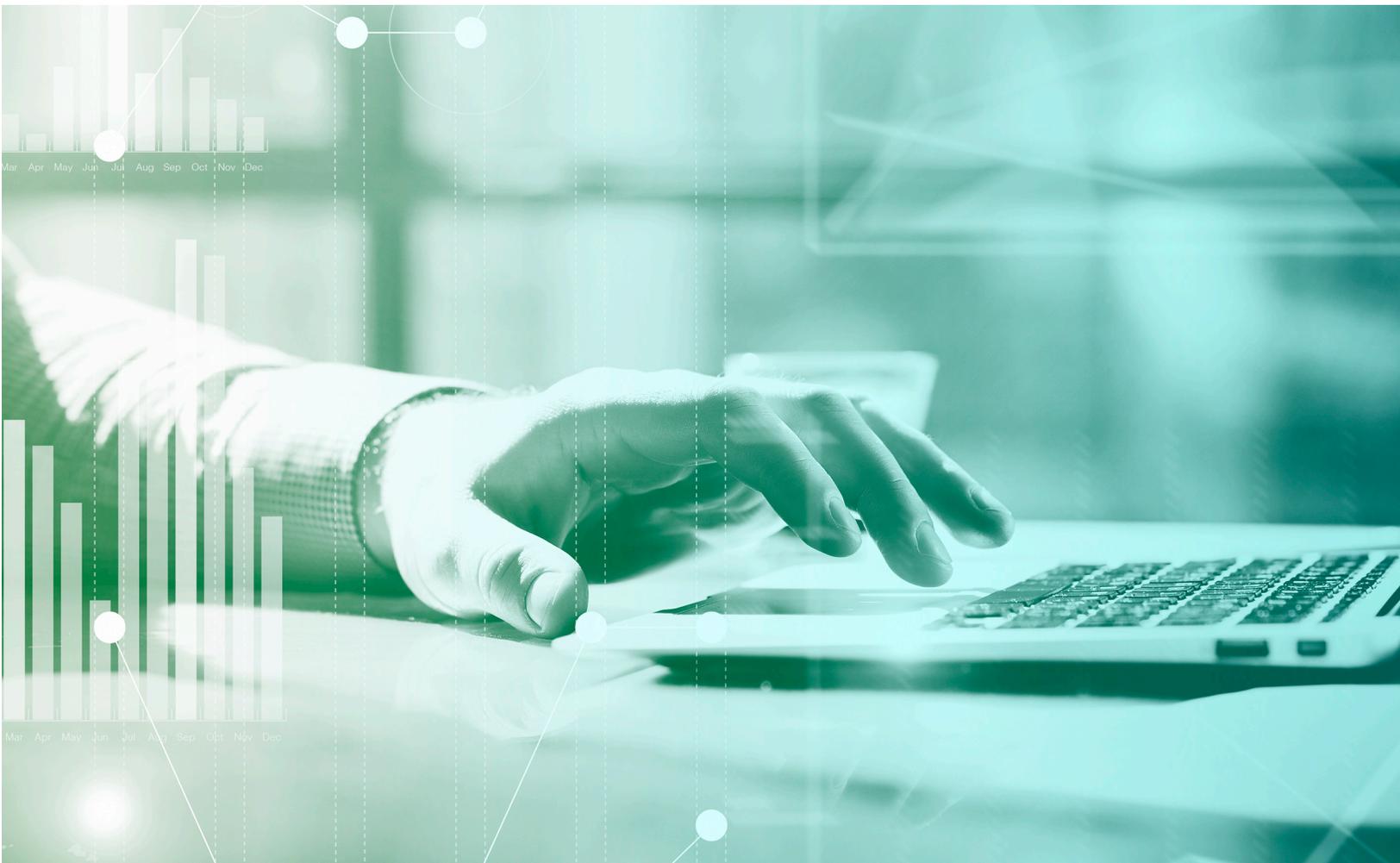


ClientSpace Sales Management Guide



A guide to manage prospects and produce proposals

ClientSpace R151

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Chapter 1

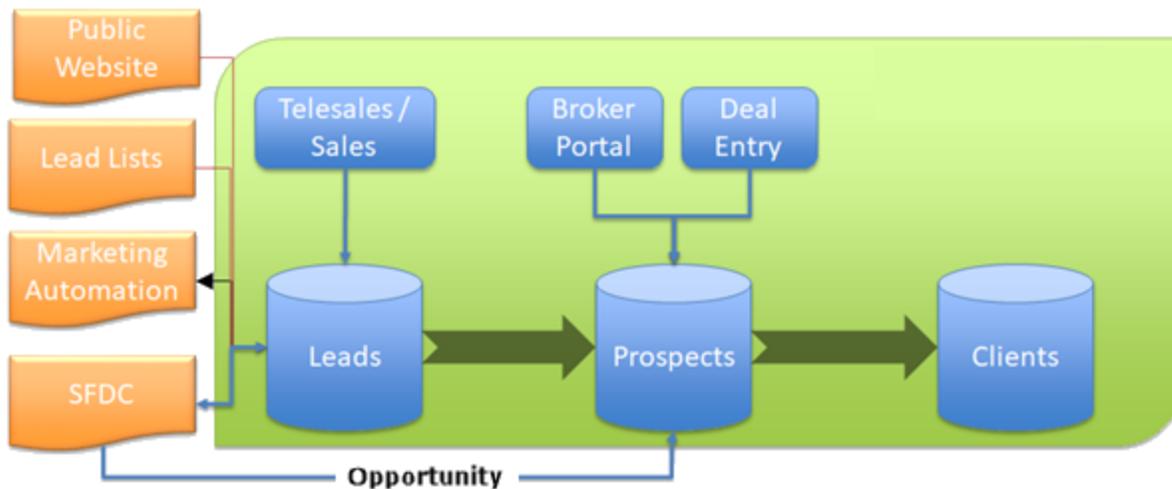
Sales and prospecting with ClientSpace

The very essence of ClientSpace is client data. To track client data, you need to find the prospects, sell them on the services you provide, and get a signed contract.

Common terminology for the sales module includes *lead*, *prospect*, *client*, and *implementation*:

- A **lead** is a sales target that has not yet shown any reasonable expectation of buying.
- A **prospect** is a sales target that has shown potential intent to buy or is actively considering a purchase.
- A **client** is a company that has committed to purchase.
- The **implementation** is the unique set of business processes required to bring on a new client.

The following diagram illustrates the sales data flow.



The ClientSpace Sales module supports every stage of the sales activities:

- **Lead generation:** identifying and collecting new sales targets.
- **Lead nurturing:** engaging with sales targets to determine fit for product or service.
- **Closing the deal:** data collection, quoting and proposal, approving, resulting in client commitment.

- **New client implementation:** activities required to deliver the product or begin servicing to a new client.

Lead generation

For purchased leads, you can import and assign lead lists. ClientSpace supports your prospecting efforts through follow-up activities, reports, and email.

Lead nurturing

Lead nurturing is supported through the ClientSpace Action Center where you can manage organization and contact information and related activities such as follow-ups, appointments, tasks, and emails. Through dashboards and reports, you can search activities, generate reports, and search organization contacts.

Closing the deal

ClientSpace helps you close the deal by organizing all your information in workspaces and starting workflows. The pricing console provides sophisticated pricing control, including the ability to track commissions to help predict profitability. ClientSpace can produce your sales proposals, contracts, and addendums.

New client implementation

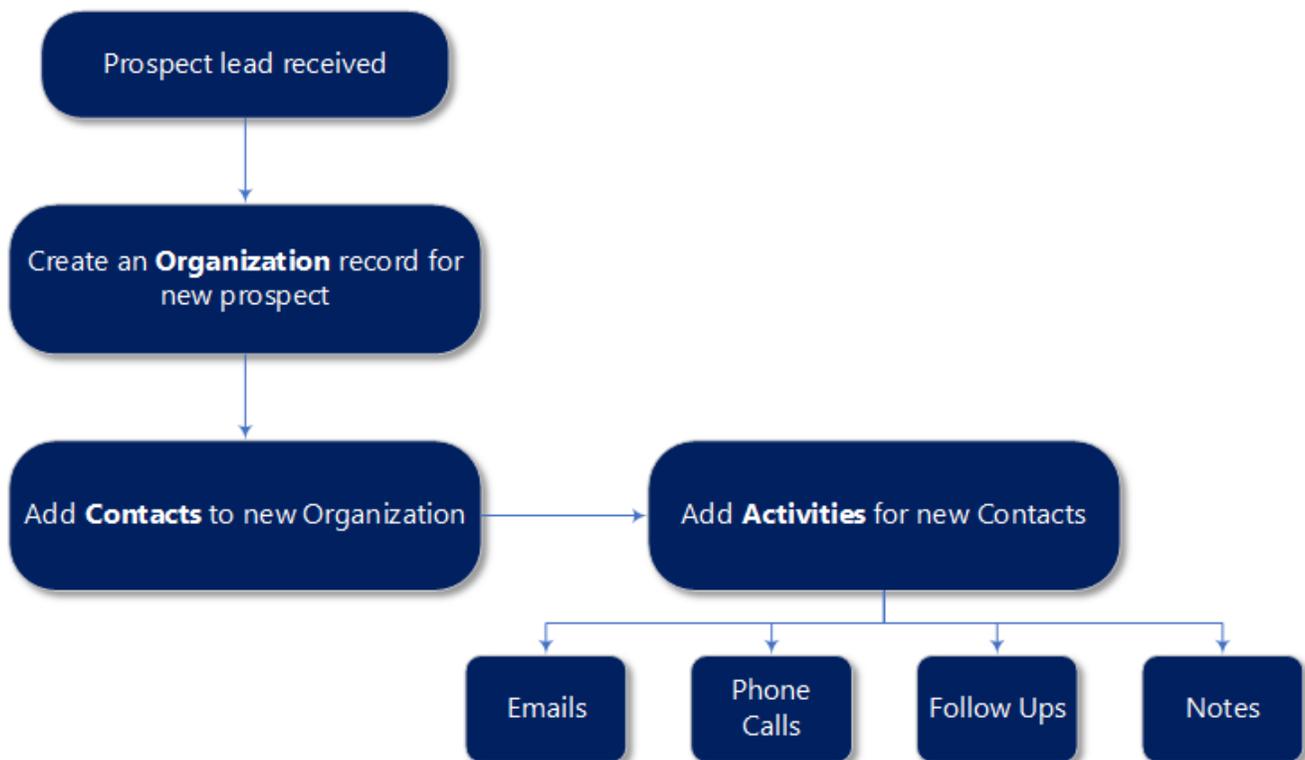
When it is time to onboard a new client, ClientSpace guides you through your own implementation workflow.

Chapter 2

Organizations, Contacts, and Activities

The ClientSpace lead management system is a sales-focused module, enabling salespeople to organize data about potential clients. With ClientSpace, you can automate processes, use the calendar functions, manage tasks, send emails, maintain notes about clients and discussions, and much more.

The first step in using ClientSpace for your lead management system is to add an **Organization** record for your prospective client. The next step is to add **Contacts** to the Organization, record **Activities** and schedule follow up activities. Activities are the critical element to managing the process.



Contacts and Activities are added using the Action Center, which becomes available after you add the Organization record.

Getting started with Organizations

Think of an Organization as a record for storing company information about a potential client. The Organization record provides you with a single place to put lead-related tasks and calendar events (meeting with your prospect) as well as phone

The screenshot shows the 'Organization Detail' form. At the top, there are tabs for 'Home' and 'Other Info'. The 'Other Info' tab is selected. The form is divided into several sections: 'Primary Information' (Name, Assigned To, Primary Contact, TeleSales Rep, Phone, DBA, Category, Status, NAICS, Created By), 'Address' (Address 1, Address 2, City, State, Postal Code, Country), and 'Business Information' (Business Type, Source, Department, Date Created, Do Not Call). A blue arrow points from the 'Other Info' tab to the 'Assigned To' field.

calls, emails, and follow-up activities. The Organization record is where you will want to track detailed information about a prospect such as name, address, federal identification number, phone, fax, website, and other company data. Additionally, you can maintain several fields for tracking the prospect's progress through the sales pipeline.

The first step in the sales process is to add an Organization record that represents your prospective client. After you add the record, you can then add contacts and track activities. Let's start by providing some demographic information about your prospective client. When you first start approaching a prospective client, you may only have some basic information, such as name, address, website, and phone number, and that is enough to get you started.

Keep in mind, as you progress your lead through the process, the more information you input into this organization form, the more functionality you can derive from ClientSpace, including forecasting, calendaring, and task management. You can always return to the Organization record and update the form as needed.



The Organization record has two tabs: **Home** and **Other Info**. The **Other Info** tab is not visible until after the Organization is saved. In each tab, fields are grouped in categories known as *fieldsets*.

Additionally, the Organization Detail form has an Action Center pane for adding Contacts, Activities, Appointments, Tasks, and Attachments.

The **Home** tab has the following fieldsets:

- **Primary Information** is where you record the organization name, business type, contact numbers, primary contact name, category, and primary workspace.
- **Address** is where you record the physical location of the organization. This is the company's main location.
- **Additional Information** has fields for the CEO or Owner name, additional phone number, a general email address, and any notes you want to record about the organization.

The **Other Info** tab has the following fieldsets:

- **Sales Pipeline** fields are where you record information about closing the deal.
- **Prospect Information** contains data about the prospect regarding the number of employees, payroll data, and benefits carrier.

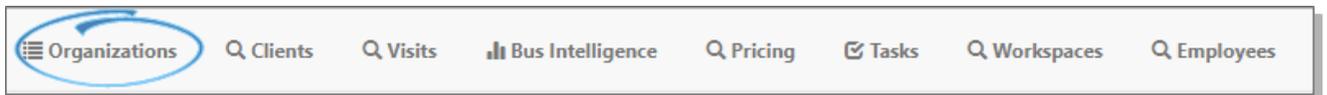
The **Other Info** tab is discussed in more detail later in this guide when you are ready to learn about the pipeline.

Adding and editing Organizations

You add an Organization from the Organization Search dashboard.

To add or edit an organization:

1. On the modules bar, click **Organizations**.



The Organization Search dashboard opens.

2. To add an organization, click **Add**. To edit an organization, select the entry and click **Open** or **Edit**.

The Organization Detail form opens.

The screenshot shows a CRM form for an organization named 'Cameron's Coffee House'. The form is divided into three main sections: Primary Information, Address, and Additional Information. The Primary Information section includes fields for Name (Cameron's Coffee House), Assigned To (Pizza, Bill), TeleSales Rep, Primary Contact (Betsch, Cameron), Phone ((654) 123-4585), Website (http://www.camscoffee.com), DBA, Business Type (Food Services), Category (Client), Status (Client), NAICS, Source (Broker), Department, Created By (Maker, Rain), Date Created (12/2/2013), and a Do Not Call checkbox. The Address section includes fields for Address 1, City (Bradenton), Postal Code (34210), Country, Address 2, State (Florida), and County (Manatee). The Additional Information section includes fields for CEO/Owner, Secondary Phone, Import ID, General Email, and EIN (684324654). A 'Capture screenshot' button is visible at the bottom of the form.

- Complete the fields in the **Primary Information** fieldset. Several fields are outlined in red: Name, Phone, Assigned To, and Website. You must complete these fields before you can save the form. Fields marked with a red border are used to check for duplicate organizations.

| | |
|-----------------|---|
| Name | The legal name of the organization. If the legal name is not known, then enter the name as it is known for now. |
| Assigned To | This is the salesperson who is responsible for onboarding the prospective client. |
| TeleSales Rep | This field is no longer used. |
| Primary Contact | Name of the primary contact of the prospective organization. You can add |

| | |
|---------------|---|
| | <p>more contacts from the Action Center.</p> <p>To add a new contact:</p> <ol style="list-style-type: none"> 1. In Primary Contact, click Add Contact. The Add Contact form opens. 2. Complete the form. 3. Click Save. You are returned to the Organization Detail form with the new Primary Contact field completed. <p>After you Save, the newly added contact is displayed in the Contacts panel in the Action Center.</p> |
| Phone | Provide the phone number for the organization. From here, you can click  to call the client. |
| Fax | Provide a FAX phone number for the organization. |
| DBA | Name the organization is known as – doing business as. |
| Website | The URL of the organization website. When you have entered a valid URL, you can click  (Jump) to launch a browser and navigate to the website. |
| Category | Category tracks the type of organization and includes such options as Client, Broker, Partner, and Vendor. Category defaults to Lead . This is by design – the system is designed to act as a sales automation system, allowing you to track the progress of the prospect from the first contact to a signed contract when they become a client. When Carrier is selected, the Carrier Details fieldset becomes available in the Other Info tab. |
| Business Type | Select a business type from the list. |
| Status | Status is for tracking the workflow through the sales process, beginning at Cold and ending at Client . Status enables sales management to track and understand their sales pipeline and build sales forecast reports. Status is configurable so that you can customize the sales workflow of your company. Status of the new organization defaults to Cold . |
| Source | Indicates how the lead originated. Select a source from the list. The list of sources for how a lead originated is configurable. |
| NAICS | North American Industry Classification System (NAICS) is the standard used by the Federal statistical agencies in classifying business establishments to |

| | |
|--------------------------------------|--|
| | collect, analyze, and publish statistical data related to the U.S. economy. To find your NAICS code, go to https://www.naics.com/search/ . You can also type the % symbol and the beginning of the classification to jump to an entry in the list. Use the % symbol to search fields for records containing the search string that follows the % symbol. |
| Department, Created By, Date Created | Department, Created By, and Date Created are auto-filled. |
| Primary Workspace | This field is available after an Organization is added and saved. Use this field to select the primary workspace for Organizations with multiple workspaces. This field is secured to System Admins. |
| Do Not Call | <ul style="list-style-type: none"> • Enabled (selected): Indicates this client prefers NOT to receive phone calls. It does not, however, disable the function. • Disabled (cleared): Phone calls to clients are welcome. Default is disabled. |

4. Complete the fields in the **Address** fieldset.

| | |
|---|--|
| Address 1, Address 2 | Organization address. Use Address 2 for additional data such as Suite #. |
| City, State, Postal Code, County, Country | Organization city, state, postal code, county, and country. When you enter the Postal Code, the City, County, and State are populated. |

5. Complete the fields in the **Additional Information** fieldset.

| | |
|-----------------|---|
| CEO/Owner | Name of the CEO or business owner. |
| EIN | EIN is the Federal Employer ID of the potential client. If the ID is applied for but not received, type Applied as a valid system value. |
| Secondary Phone | Secondary phone number for the organization. |
| General Email | General email address for the organization. You can add email addresses for contacts in the Contact record. |
| Import ID | The Import ID is automatically assigned if the Organization record was |

| | |
|------------------|--|
| | imported from another source such as a lead list. When an Organization record is created through business logic, an Org Other Info tab is also created. When the new record is created, ImportID on the Org Other Info is set to the Org ImportID. |
| General Notes | Another place to record notes in place of an Activity. |
| Active | <p>An Organization record can be Active or Inactive.</p> <ul style="list-style-type: none"> • Enabled (selected): The record is active. Default is Active. • Disabled (cleared): The record is not active. Inactivating an Organization inactivates all the related Contacts. If you decide to reactivate an Organization, the previously related Contacts are not reactivated. When you inactivate an Organization, a message is displayed: Inactivating this organization will inactivate the related contacts as well. Any related contacts will not be reactivated if the organization is reactivated. Are you sure you would like to proceed? |
| Locked | <ul style="list-style-type: none"> • Enabled (selected): Lock to record or prevent any further updates from an import. • Disabled (cleared): The record is open for updates from an import. Default is disabled. |
| Allow CRM Import | <ul style="list-style-type: none"> • Enabled (selected): You can import customer data from a customer relationship management system. Default is enabled. • Disabled (cleared): No imports allowed. |

6. Click **Save** to save the record, which begins the duplicate checking process.

The duplicate checking process starts by comparing values that are similar but not the same for the Name, Phone, and Website recorded on the lead to the same information on previously saved organizations. Duplicate checking helps to ensure that you do not approach the same potential client more than once.

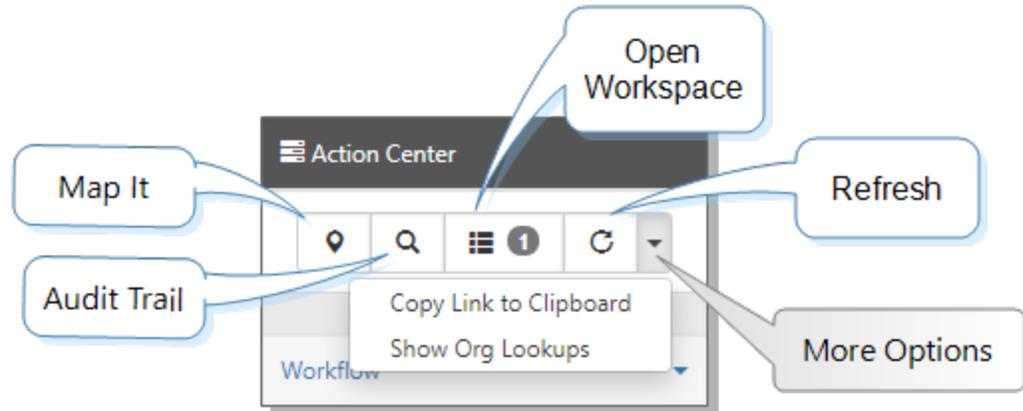
What's next

Now that you have created an Organization record let's start using the Organization record to store your prospecting information. See [Portal to all actions: Action Center](#).

Portal to all actions: Action Center

The Action Center is your *go to* for all actions that you record about the Organization. The Action Center helps you manage communication with sales prospects and clients. The Action Center is a menu with mini-panels and a toolbar for additional options.

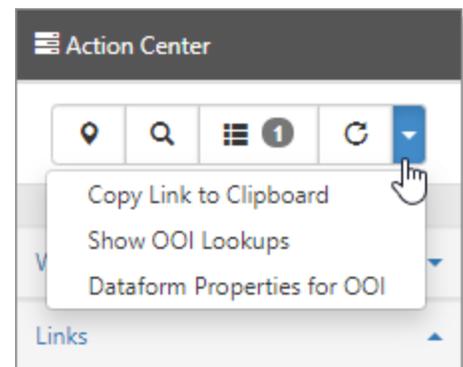
From the **Home** tab, the Action Center toolbar presents the following options:



- **Map It:** Open Google Maps to the location of the Organization.
- **Audit Trail:** Open the Audit Trail dashboard for the Organization with the list of actions on the organization record. More configuration may be required to use this function.
- **Open Workspace:** Open the workspace for this Organization if applicable.
- **Refresh:** Refresh the screen.
- **Copy Link to Clipboard:** From More Options, you can copy the link to the Home tab page.
- **Show Org Lookups:** From More Options, you can open the Lookups dashboard to view a list of all available lookup values that apply to the organization fields.

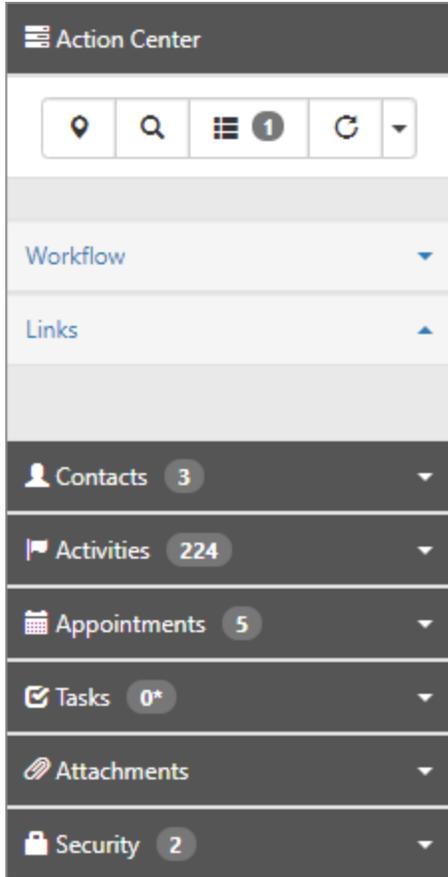
From the **Other Info** tab, the Action Center toolbar presents the following More Options:

- **Copy Link to Clipboard:** Copy the link to the Org Other Info tab page.
- **Show OOI Lookups:** Open the Lookups dashboard for the Org Other Info (OOI) fields.
- **Dataform Properties for OOI:** Open the Dataform Properties form for Org Other Info (OOI).



When you select the **Organization Other Info** tab, the Action Center changes the **Audit** link to point to the Organization Other Info Audits and the More Option

items change to Copy Link to Clipboard, Show OOI Lookups, and Dataform Properties for OOI. OOI represents Org Other Info fields.



The Action Center is a menu, displayed in a panel that is adjacent to the Organization record, The Action Center comprises the following mini-panels that expand and collapse:

- **Workflow** links allow you to advance the Organization through the workflow processes such as Create Client. We discuss the Workflow links later in the onboarding process.
- **Contacts** panel is where you add the people with whom you will work during the onboarding process to service them as a client.
- **Activities** reflect your communication with the prospect: Emails, Phone Calls, Follow Ups, and Notes.
- **Appointments** panel is where you record meetings with the prospect to include information such as date, time, type, status, and location. Appointments are events that you can add to your calendar using the Action Center from the open Organization record. Additionally, you can schedule appointments with clients from the Action Center and your ClientSpace calendar. Adding appointments from the Action Center saves you time by creating the event on your calendar and recording the event with the Organization.
- **Tasks** are how you track individual actions that need to be completed to close the sale. Tasks are configurable assignment items with an Owner and Assigned To person and have defined start and optional end dates.
- **Attachments** allow you to attach files to the Organization record such as communication in other formats.
- **Security** shows users and roles who have access to the Organization record. From this mini-panel, you can administer access by adding or removing roles and controlling access: View, Edit, and View List.



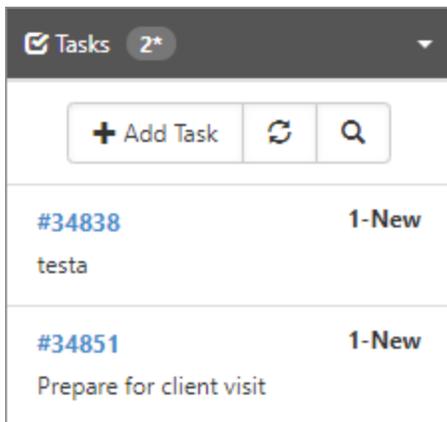
Action Center mini-panels with items (records) display a counter badge, showing a count of the current items. An * (asterisk) beside the counter indicates there is at least one inactive record. The example shows that the Organization has one Contact, seven Activities, and one Appointment.

Searching Tasks from an Organization

You can search tasks from multiple places. Let's look at searching tasks from the Organization record.

To search tasks:

1. From an open Organization record, in the **Action Center**, expand **Tasks**.
The active tasks display. When there are inactive tasks, the badge counter shows an * (asterisk).



2. To view all tasks, click **View Full Search**.
The Organization Tasks dashboard opens.
By default, all active and inactive tasks are displayed. The chiclets indicate the applied filters.
Inactive records display in bold and italics.

| | Start Da... | ID | Due Date | Workspace | Subject | Assigned To | Contact | Priority | Select |
|--|-------------|-------|------------|---------------------|--------------------------|-----------------|------------------|----------|-------------------------------------|
| | 12/06/2019 | 29143 | | Filches Fish Market | test3 | User, Developer | | Low | <input checked="" type="checkbox"/> |
| | 08/19/2020 | 34838 | | Filches Fish Market | testa | User, Developer | | Medium | <input type="checkbox"/> |
| | 08/26/2020 | 34851 | 08/29/2020 | Filches Fish Market | Prepare for client visit | User, Developer | Filch, Malodorus | Medium | <input type="checkbox"/> |

3. To view only active tasks, on the chiclet, click **X Show All**.
This action removes the filter to display only active tasks.

Org Other Info tab

The Org Other Info record appears as a tab on the Organization Detail, but it is, in fact, a configurable dataform tied to Organization records. As a

Organization Detail

Other Info

Primary Information

* Name: Filches Fish Market

TeleSales Rep: [User]

Phone: (800) 931-2424

DBA: [Field]

Category: [Field]

Status: Status 2

NAICS: [Field]

Created By: User, Developer

* Assigned To: Antonino, Jeff (Expired)

Primary Contact: Filch, Felonius

Fax: [Field]

Website: http://filchesfish.com

Business Type: Bus Type 2

Source: Source 2

Department: [Field]

Date Created: 8/27/2018

Do Not Call

dataform, you can customize the Organization record to store information that is important to your business and sales process. The Organization Other Info tab also supports configurable business rules, field display conditions, and links. How your company uses Org Other Info depends in part on your sales prospecting process. A few examples of this form are included in this topic.

Carrier Details and NAIC number

On the **Home** tab, in the **Primary Information** fieldset, when you select **Carrier** for **Category**, in the Other Info tab, the Carrier Details fieldset becomes available with the **NAIC** field.

Home | Other Info

Primary Information

| | | | |
|---------------|------------------------------|-----------------|------------------------------|
| * Name | SUNZ Insurance Solutions | * Assigned To | Manager, Sales |
| TeleSales Rep | | Primary Contact | Distefano, Glen |
| Phone | (941) 778-2111 | Fax | |
| DBA | Alliance Insurance Solutions | Website | http://www.sunzinsurance.com |
| Category | Carrier | Business Type | Insurance |
| Status | N/A | Source | |
| NAICS | 23108: Insurance Producer | Department | Client Services |
| Created By | Manager, Sales | Date Created | 8/23/2009 |

Do Not Call

The NAIC number is assigned to each individual underwriting company. The NAIC field auto-fills from the carrier's **Org.IndustryCode** field.

Home | Other Info

WC Carrier

Salesforce Log

Carrier Details

NAIC 23108: Insurance Producer

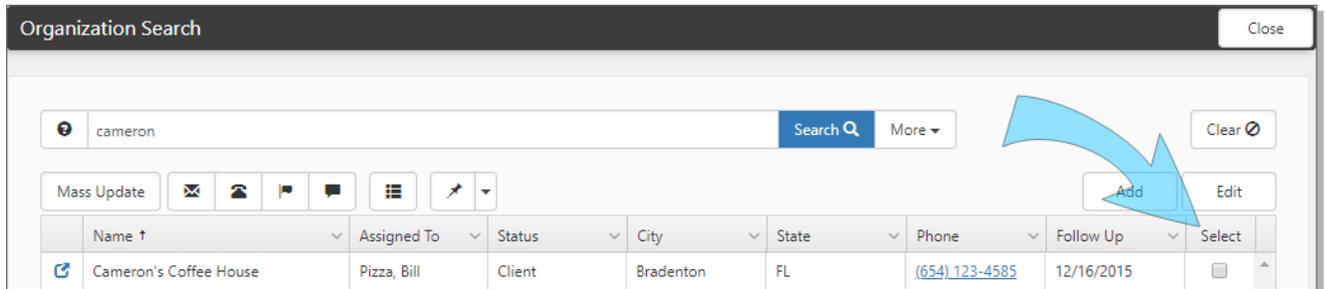
Organization SUNZ Insurance Solutions

Using mass update from Organization search

Sometimes you need to update several Organization records with the same change, but you shouldn't have to open each one, make the change and save. You don't have to – the Organization Search dashboard provides a Mass Update function that allows you to select multiple records and update them all at the same time.

To use Mass Update from the Organization Search:

1. Open the Organization Search dashboard and use filtering to find the records you want to change.
2. Select the records using the **Select** option at the end of the row.



3. Click **Mass Update**.
The Mass Update form opens.
4. Choose the Organization Detail fields you want to update, make your changes, and click **Save**.
Security changes from Mass Update fire Org business logic and thereby update any related Client Team and Workspace Owner settings on the related workspace.

Note: PrismHR recommends as a best practice, when changing security such as the Assigned To, that you filter the Org Search dashboard for the user you are changing from, so that as you update the records you can re-run your search and see them move to the appropriate new user.

Organization Search functions

From the Organization Search page, you can do the following:

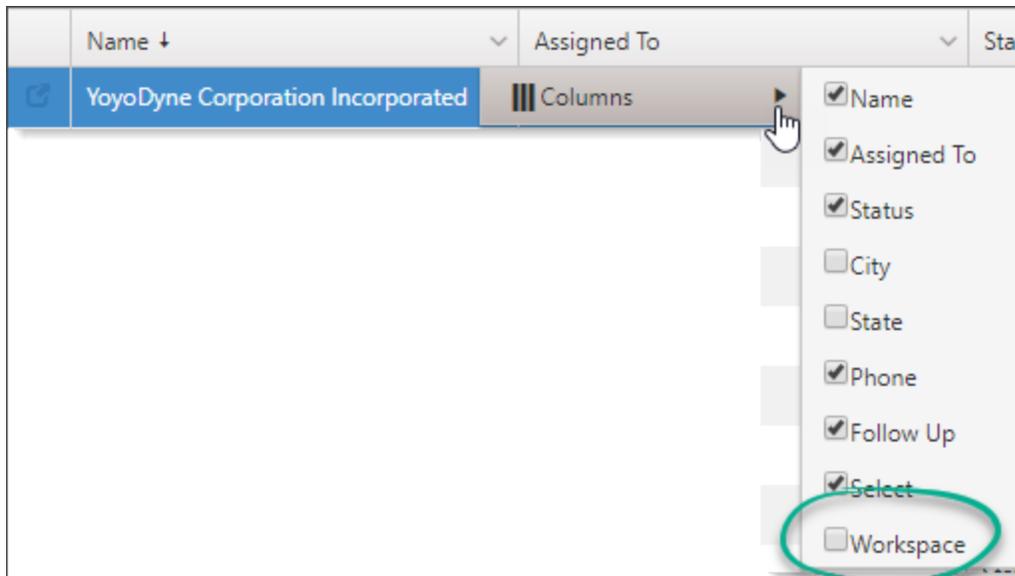
- Perform mass updates. See [Using mass update from Organization search](#).
- Add an Organization. See [Adding and editing Organizations](#).
- Jump to a Workspace from the Organization Search list.

You can jump to a Workspace from an Organization that has workspaces. When enabled in the list, the Workspace column contains the workspace name of the primary workspace for the selected organization formatted as a link that opens the Workspace landing page.

To jump to a Workspace from the Organization Search list:

1. On the modules bar, click **Organizations**.
The Organization Search dashboard opens.

2. Review the displayed columns.
3. Beside a column name, click  and then click .



4. In the menu, select **Workspace** to add the Workspace column.
 - Organizations with Workspaces display a clickable link in the Workspace column.
 - Organizations that do not have associated workspaces display a blank column.

| Name ↑ | Assigned To | Status | City | State | Phone | Follow Up | Select | Workspace |
|--|-------------|------------|---------------|-------|---|-----------|--------------------------|--|
|  Yoyodyne Propulsion S... | Maker, Rain | Onboarding | Grovers Mills | NJ | (941)555-1212 | | <input type="checkbox"/> | Yoyodyne Propulsion S... |

5. To jump to the workspace for the selected Organization, click a Workspace link.

Creating a Workspace from an Organization

You can easily create a workspace in Implementation status directly from an Organization record using the New Implementation link. This is a convenient feature for clients that do not use the ClientSpace Sales module. This feature generates a Client Master and Client Team.

The **New Implementation** link is a feature available to users of the Implementation Group license. The link generates Workspaces directly into Implementation status.

Creating a workspace in Implementation status requires the following:

- The **New Implementation** link on the Organization displays only if the Organization does not already have associated workspaces (scripted as inactive).

- The features uses the business rule **Setup Client in Implementation**.
- The link is deployed as inactive.
- Clicking this link runs the same business logic as the Create Client link without prompting for Client Number. Org/Contract status is Implementation.
- When workspace generation is complete, the Workspace landing page is displayed.

To create a Workspace from an Organization:

1. Open the targeted Organization record.
2. In the **Action Center**, under **Workflow**, select **New Implementation**.
A Workspace record opens for your Organization showing the Contract Status as Implementation.

Creating Workspaces using different templates from Organizations

ClientSpace has the ability to allow Template level customization, with multiple workspace templates, each with unique dataforms and configuration. Template workspaces help you to maintain a consistent set of dataforms and workspace tools.

This topic describes how to enable multiple templates within ClientSpace so that when using the Generate Quote link from the Organization, you can choose a template when generating the new workspace.

To create workspaces using different templates:

1. Go to **System Admin**  > **Advanced** > **Custom Links**.
The Configure Links dashboard opens.
2. Click **Add** and use the following configuration:

| | |
|----------------------|---|
| Location | Select tblOrganization . |
| Group | Select Action . |
| Display Action | Select Custom Function . |
| Custom Function | Insert organization.generateQuote . |
| Custom Function Data | This is a comma-separated list of Names and Values, surrounded by curly braces and comma delimited. Should contain at least TemplateGUID and TemplateType. To find the TemplateGUID, expand |

| | |
|-------------------------|--|
| | the workspace settings on the template workspace for which you are creating the link. |
| Pinned Open | When selected, Pinned Open displays the Link by default on the right nav pane without having to open the More menu. |
| Link Display Conditions | Use this area to add triggers for link display. |

3. Click **Save**.

Next, go to Workspace Templates.

1. Go to **System Admin**  > **Workspace Templates**.
2. Open the template in question.
3. In the **Action Center** toolbar, click  (**More Options**), and select  **Settings**.
The Workspace Settings form opens.
4. Select a **Related Organization**.
5. Click **Save**.

Create Prospect links in ClientSpace are configured much like other links in the system. After a workspace has been created, the Generate Quote link changes to a Go to Workspace link unless special metadata has been configured on the Client Master Status (ContractStatus) and the Organization Status (CRMOrganizationStatus) Lookup values. When you select the Enable Additional Workspace Creation option on both these lookup metadata forms, it enables the Create Prospect link even after a Workspace has been created for the Organization.

Learning how: Sales Activity Management



View the video [Sales Activity Management](#).

Chapter 3

Managing your leads: Organizations, Contacts, and Activities

The ClientSpace Organization lead management system is a sales focused module, enabling salespeople to organize potential clients much as you would in a Rolodex system. However, Organizations use Salesforce to automate their processes, providing calendaring functionality, task management, email automation, and much more.

This section provides an overview of the Organization detail record and associated Org Other Info record. The records help salespeople manage accounts, leads, opportunities, and customer interactions while helping management generate more accurate forecasts and gain better insight into sales opportunities. The organization detail record is a contact card for storing detailed information about a prospect such as name, address, phone, fax, website, and company data as well as several fields for tracking the prospects progress through the sales workflow.

Review the following topics to learn about managing your leads.

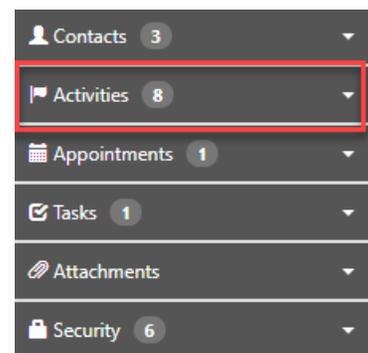
Tracking Activities

Sales activities are the records of the sales calls and actions you perform as part of the sales process. Managing multiple prospects can be daunting unless you have the right tools to help you remember who did what and when. Being able to record these sales activities quickly and easily is what the Activities icons are all about. Throughout the sales process, you may need to record many contact events with the potential client. These events are recorded as Activities using the Action Center.

Activities are managed in the Action Center, under the Activities section. Counter badges display a count of the activities.

Additionally, the Activities icons are helpful visuals to record Emails ✉, Phone Calls ☎, Follow Ups 📅, and Notes 📝. You can also View Full Search 🔍 and View Summary.

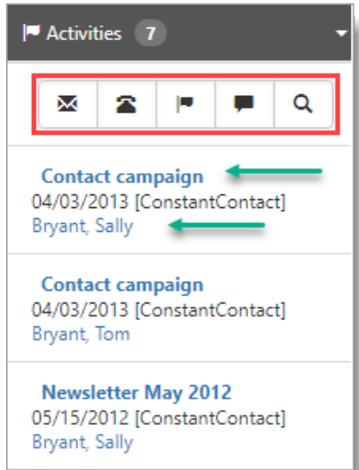
From here you can add and track activities.



To track activities:

1. In the **Action Center**, click **Activities**.

The Activities list expands with a list of activities such as contacts, phone calls, emails, and view options.



2. To view an activity, click the activity link (for example *Contact campaign*).
3. To view a contact associated with the activity, click the contact name link (for example, *Bryant, Sally*).
4. To search for a list of the organization activities, click **View Full Search**.
5. From here, you can Search, Add or Edit activities.
6. To view a summary of the organization activities, click **View Summary**.

This link opens a new page that lists total activities and the most recent recorded activity. The summary provides an organized view of what happened and when it happened. In the summary view, you can open individual activities.

Adding Emails

ClientSpace allows you to manage your email communications with prospective clients directly from the Organization record, where you have notes, calls, and follow-up information at your fingertips.

To add an email:

1. In the **Action Center**, expand **Activities**, and click  (**Add Email**).
The Add Activity form opens.

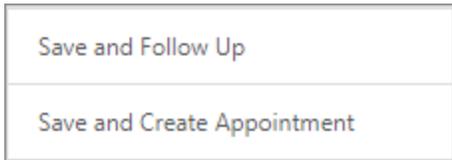
2. Complete the form.

| | |
|-----------------------------|---|
| Activity Type | Defaults to Email when you select Add Email. |
| Contact | Select the contact to receive the email. |
| Subject, Body | The email subject and body are presented in the appropriate fields when you send the email. Combine these with the signature you can store on your user profile and for a quick way to generate emails to your prospects without ever having to leave ClientSpace. |
| Activity Result | When you determine how the email was received, you can record the activity result. For example, if you email a prospect requesting a meeting and the prospect responds with a date and time, you can record the result of the email to indicate Schedule Appointment . |
| Activity Date | When you sent the email. |
| CC Current User | Select this option to receive a copy of the email. |
| Save and Follow Up | This is a Workflow link that allows you to send your Email and a Note with an activity type of Follow-up, similar to a tickler file to help you keep the sale moving down the road towards signing the deal. See Save and Follow Up . |
| Save and Create Appointment | This is a Workflow link to save the file, send the email, and create a calendar invitation for you and your selected Contact. |

3. Click **Save** when done.

Save and Follow Up

Save and Follow Up function is an automatic reminder for following up with a Contact on a specific date.



To create a follow up:

1. From the **Add Activity** form, click **Save and Follow Up**.
The Create Follow Up form opens.

 A screenshot of the "Create Follow Up" form. It includes fields for "Follow Up Date", "Assigned To" (with a dropdown menu showing "Maker, Rain"), "Subject", and "Contact" (with a dropdown menu). There are "Ok" and "Cancel" buttons at the bottom right.

2. Complete the form.

| | |
|----------------|---|
| Follow Up Date | Select a date for when you want to be notified that it is time for a follow up with the client. |
| Assigned To | Auto-filled. |
| Subject | Type a Subject that describes the follow up. |
| Contact | Auto-filled from Add Activity. |

3. Click **Ok**.

A Send Email message is displayed: "Would you like to Email this Activity upon saving changes? Click No to save the activity without sending an Email."

4. To send the email on Save, click **Yes**.

5. To save only, click **No**.

The new activity, *Follow up*, is listed in the Activities panel under the Action Center. The Follow Ups also appear in your Home dashboard in the Follow Ups widget.

Save and Create Appointment

From an activity record, you can create a new calendar event for the organization related to the activity. Additionally, the new calendar event in the workspace defaults to the organization's workspace. The activity work item is saved, and an appointment work item is created.

To save and create an appointment:

1. From the open Organization record, expand **Activities**.
2. Select an Activity for which you want to create an appointment. If there are no activities listed, add one first.
3. From the open Activity, under **Workflow** click **Save and Create Appointment**. The Appointment form opens with the event details that you completed earlier.
4. Complete the form.

| | |
|---------------|--|
| Time Zone | Required. |
| Subject | Required. |
| All Day Event | Select this option if the appointment is an all day event. This sets aside the time on your calendar to avoid conflicts. This option auto-fills the Start Time and End Time for the selected date. |
| Private | Displays the appointment details on the user's calendar as private to any other user who may be viewing. |
| Start Date | Required. Start date of the appointment. |
| End Date | Required. End date of the appointment. |
| Start Time | Required. Start time of the appointment. |
| End Time | Required. End time of the appointment. |

| | |
|------------------|---|
| Meeting Type | Required. |
| Meeting Status | Required. Select Pending, Confirmed, Completed, Canceled. The initial setting is Pending. |
| Meeting Category | Customized by your installation through Lookups. For configuration assistance, log an Extranet case. |
| Organizer | Required. |
| Workspace | Defaults to the organization's workspace. If the organization has multiple workspaces, you can use the workspace selector to choose one of the associated workspaces. |
| Organization | Defaults to the organization associated with the activity. |
| Contact | The contact person associated with the activity. If not set, you can select a user or add a new user from this list. |
| Location | The location of the appointment such as phone, physical location, virtual meeting, and so on. |
| Body | Provide a description or objective of the appointment. For example, if this appointment is for a meeting, list the agenda. |

5. Click **Save**.

Any changes made to the activity prior to clicking the link are saved when the link is selected. Validation on the activity, such as required fields, also happens when the link is selected.

Adding Phone Calls

Part of the prospecting process is to call lots of people all day long. So, keeping track of your calls or what was said can be a daunting task, especially if you are using mass contact functions such as a marketing campaign to reach a large audience all at once. Tracking phone activities is very similar to the email activity and allows you to record the subject of your call, what you talked about, whom you talked to, and the result of the call.

To add a phone call:

1. In the **Action Center**, expand **Activities**, and click  (**Add Phone Call**).
The Add Activity form opens, defaulted to the Activity Type of Phone Call.
2. Complete the form.
The following options are similar to email functionality.

| | |
|-----------------------------|---|
| Activity Type | Defaults to Phone Call. |
| Contact | Select the person you talked to. |
| Subject, Body | Use these areas to record what you spoke about on your call. |
| Activity Result | Result of the call. |
| Activity Date | When the activity happened. |
| Save and Follow Up | This is a Workflow link that allows you to save the phone call activity and remind you later to follow up with the prospect. See Save and Follow Up . The Save and Follow Up link creates a follow-up activity type, similar to the email activity. |
| Save and Create Appointment | This is a Workflow link to save the file and create a calendar invitation for you and your selected Contact. See Save and Create Appointment . |

3. Click **Save** when done.

When **Do Not Call** on the Organization Detail record is enabled, it is a visual reminder that this client does NOT like to receive phone calls. It does not, however, disable the Phone Call activity icon.

Adding Follow Ups

Follow up records are a reminder for you to contact the prospective client later, either concerning a previous call or email or as a direct contact to maintain visibility with the prospect. Follow up records integrate with the Organization area of the Home page.

To add a follow-up:

1. In the **Action Center**, expand **Activities**, and click  (Add Follow Up). The Add Activity form opens.
2. Complete the form.

| | |
|----------------|--|
| Activity Type | Defaults to Follow Up . |
| Contact | Select a contact for this Organization. |
| Assigned To | Auto-filled. |
| Follow Up Date | Required. Select a date to perform the follow-up activity. |

| | |
|-----------------------------|--|
| Subject | Provide a meaningful subject for this follow-up activity. |
| Body | Provide meaningful content to perform the follow-up activity. |
| Activity Result | Select an entry to reflect the result of the activity. |
| Activity Date | Select the date of the follow up activity. |
| Save and Follow Up | This is a Workflow link that allows you to save the follow up activity and remind you later to follow up with the prospect. See Save and Follow Up . |
| Save and Create Appointment | This is a Workflow link to save the file and create a calendar invitation for you and your selected Contact. |

3. Click **Save**.

When saved, Follow Up records display in the Activities list as follow-ups, but when opened they clear the Activity Type field to make it easier for you to convert the follow-up to another type of record, such as a call or email. Follow up records integrate with the Organizations area of the Home page in ClientSpace.

As a best practice, the Organizations area of the Home page in ClientSpace only displays follow-ups from today and earlier. If these follow-ups are consistently assigned an appropriate activity, such as email or a phone call, this section of Home can be used as a To Do list of items that should be completed by today.

Adding Notes

Add Note opens a new Note record to record detailed information about your prospective client. Using Notes in concert with Emails, Phone Calls, and Follow Ups ensures that you have all the information you gather about a prospective client at your fingertips.

To add a note:

1. In the **Action Center**, expand **Activities**, and click  (**Add Note**).
The Add Activity form opens.
2. Complete the form.

| | |
|---------------|---|
| Activity Type | Required. Select a type from the list. |
| Contact | Select an organization contact from the list. |

| | |
|-----------------------------|--|
| Subject | Required. Provide a meaningful subject. |
| Body | Provide a detailed description that can help you when reviewing later. |
| Activity Result | Select an entry from the list. |
| Activity Date | Date of the activity. Auto-filled. |
| Save and Follow Up | This is a Workflow link that allows you to save the follow up activity and remind you later to follow up with the prospect. See Save and Follow Up . |
| Save and Create Appointment | This is a Workflow link to save the file and create a calendar invitation for you and your selected Contact. |

3. Click **Save** when done.

Tracking Deals Information

ClientSpace allows you to track deals using the Kandu Deals sales form. This form is used to hold information similar to what you would collect on a Salesforce Opportunity record or in Microsoft Dynamics or Hubspot.

Before You Begin...

This form is accessed from the Client Master dataform **Action Center** under **Links**. Since this form is an optional feature, you will need to add the form to the Client Master dataform as a custom link if you have not done so already. Basic link configuration appears similar to the following:

Configure Links Detail Save Apply Save & New Cancel

General

* **Location** Client Master

* **Group** Link 1

* **Display Action** Workspace Dataform

Target Dataform Kandu Deals

Linked Field Related Client Master (fkRelatedClientMasterID)

Custom Function

Display Value Kandu Deals Sales Form

Sort Order 0

Report/Merge

Code Value

Custom Function Data

URL

Confirmation Message

Description

Display this Link when adding Pinned Open

Badge Counter Proc

Condition Expression

Action Center

Keep in mind that your specific settings may vary slightly. For instance, you might select a different sort order or implement a condition expression that causes the link to only be available under certain conditions. For more information on adding a custom link, please see [Configuring Custom Dataform Links](#).

Adding Deals Information to the Client Master

To add deals information:

1. On the Client Master Dataform, in the **Action Center** under **Links**, click **Add +** next to the **Kandu Deals Sales Form** link.
The Kandu Deals form opens.

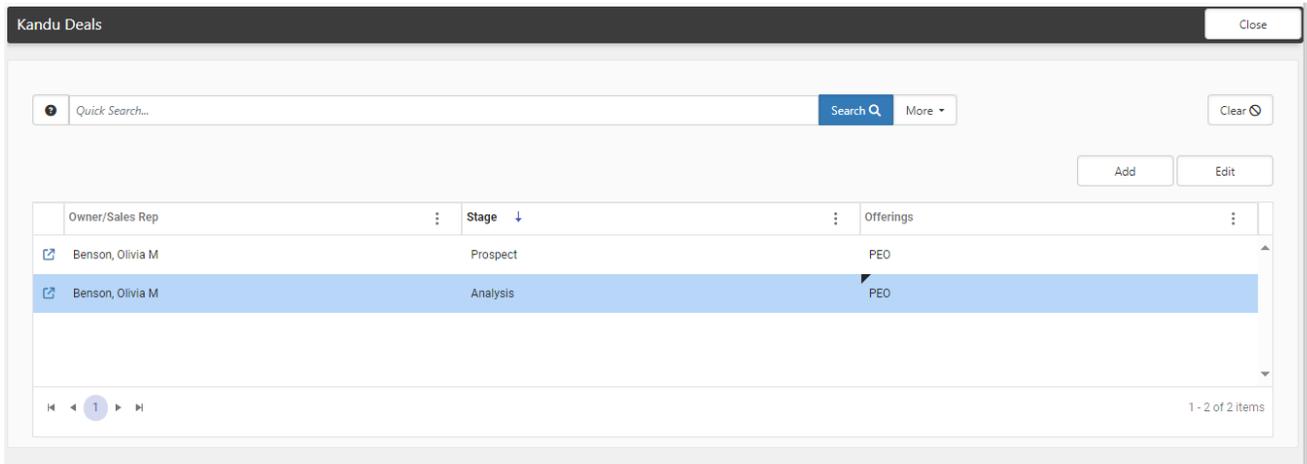
2. Complete the form.

| | |
|-----------------|--|
| Owner/Sales Rep | Select the sales representative handling the deal. |
| Customer Type | Select whether this is a New or Existing customer. |
| Stage | Select a deal stage, such as Prospect. Note: You can add additional Kandu Deals forms as the deal progresses through other stages, such as Negotiation, Closed Won or Closed Lost. This way, you have a snapshot of the deal at each stage. |
| Offerings | Select a deal type that describes the services or offerings included in the proposed deal, such as PEO, Benefits, or Carve Out. |
| Description | Enter a note describing the deal or add other notes you want to track about this deal. |
| Date Initiated | This field defaults to the current date and time when you first click Add + to open a new Kandu Deals form. You can edit the field, if necessary, by manually typing a date and time or you can set a different date using the Calendar  interface. |
| Date Closed | If you are adding a Kandu Deals form in a final stage such as Closed Won or Closed Lost, manually type the date and time of the final deal stage or set the date using the Calendar  interface. |

3. Click **Save** when done.

Editing Deals Records

If you have entered multiple Kandu Deals records on a Client Master records, clicking the **Kandu Deals Sales Form** link (not the **Add +** icon) in the **Action Center** opens the Kandu Deals dashboard:



The dashboard lists all Kandu Deals records associated with the Client Master record you are currently working on.

Click  (**Open**) next to a record to open and edit the record.

Note: If you have only entered one Kandu Deals record, clicking the **Kandu Deals Sales Form** link opens the record without displaying the Kandu Deals dashboard.

Phoning Contacts

Did you know that you can call contacts directly from ClientSpace? You need a voice over Internet protocol (VOIP) application such as RingCentral Phone.

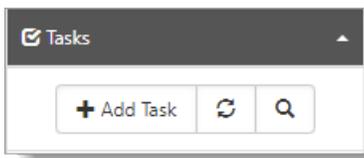
To call a contact:

1. Open a contact record.
The Contact Detail form opens.
2. Locate fields marked with  (Phone): Business Phone, Mobile, Fax, or Pager.
3. Click .
4. Click your VOIP application (for example, **Open RingCentral Phone**).
The application opens. You may need to sign in before initiating the call.

Adding tasks

Tasks are work items of limited scope, sort of like a checklist of To Do items. An example of a sales task could be Check Credit or Send Thank You Card. For sales organizations that utilize an internal sales coordinator, generating tasks for that person gives the sales rep an easy way to make a service request and check to ensure it has been completed on time.

You add tasks from the Action Center panel, in the Tasks section.



To add a task:

1. In the **Action Center**, expand **Tasks**, and click **Add Task**.
The New Task form opens.
2. Complete the form.

| | |
|---------------------|---|
| Owner | Owner of the task defaults to the task creator. |
| Status and Workflow | Default to New . |
| Start Date | Defaults to today's date. |
| Category, Priority | Required. Not automatically populated. |
| Due Date | Can be set to show expected delivery of the task completion, this can also be used in task management to filter for records due today, or this week, and so on. |
| Subject | Required. Provide an appropriate subject for this task. |

3. Click **Apply** when done.

Tasks are visible in the Action Center under Tasks. When you add a task, the counter increments, showing the number of tasks associated with this organization. Outstanding tasks are displayed in the Tasks panel. As tasks are completed, they are removed automatically from the Tasks panel.

Activity Summary

Activity Summary provides a one-stop shop for managing activities.

To view the activity summary:

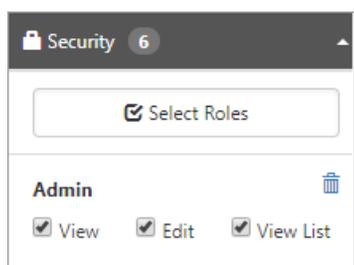
1. Open an Organization record.
2. In the **Action Center**, expand **Activities**, and click **View Summary**.
You are presented with a list of activities associated with the organization.
3. Select an activity in the left to view details of the activity (displayed on the right).
4. Use Filtering for a quick method to review all activities.

Chapter 4

Security

Security for the organization allows you to manage who has access to the organization and what level of access they possess. Users and roles are displayed in the **Action Center**, on the **Security** panel of the **Organization**. The selected boxes control their rights: View, Edit, View List.

When you Save or Apply changes to an organization record, Security entries appear in the Security panel of the Action Center. For example, on the initial Organization creation, security is established for the user that created the Organization Detail record and for the department associated with the Assigned To user. Users can be added in a number of ways, including manual inclusion by the salesperson, Departmental security, and Org Category security.



To view or edit security:

1. Open an Organization record.
2. In the **Action Center**, expand **Security**.
3. To add users or roles to the security for this organization, click **Select Roles**.
4. To remove a role, locate the role and click (**Remove**).
5. To change the rights for a role, select or deselect **View**, **Edit**, or **View List**.

| | |
|-----------|---|
| View | View can open and view the record. <i>View</i> without <i>View List</i> does not make the record appear in the Search list. |
| Edit | Edit can apply changes to the record. |
| View List | View List can see the record in Organization search, but cannot open or edit. |

For a complete description of Organization security and how it works, see the *ClientSpace Setup & Administration Guide*.

Chapter 5

Pricing

The Pricing Console aids in managing costs on the various components so that you can realize what you are paying the carrier. It helps you determine costs using the Pricing Batch, Pricing Comp Code, and Pricing State dataforms.

To access the Pricing Console:

1. From the modules bar, click **Q Pricing**.
The Pricing dashboard opens.
2. To view pricing for a workspace, locate and open the targeted workspace.
The Pricing Console opens.

Creating Pricing

ClientSpace pricing is created using Add State & Code or dragging the pricing file onto the Pricing Console.

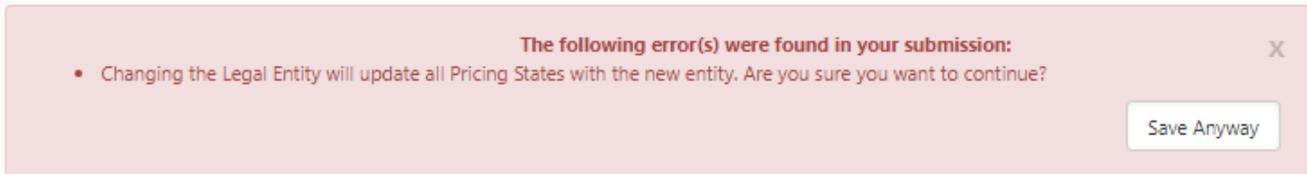
- **Add State & Code** allows you to add one entry at a time. ClientSpace generates new pricing behind the scenes for you automatically.
- Dragging or uploading the pricing data file allows you to perform bulk updates and then merge the data.

Using Add State & Code

With the Add State & Code approach, you can add individual states and codes, one at a time.

When you add a state in the States and Codes area, the system will do one of two functions. If the **Legal Entity** field on the related Client Master is empty, the system will check the Contract Type of the Pricing Batch and default the legal entity based on the Contract Type metadata (System Admin > Lookups > Contract Type). This can lead to a multitude of options for the selection of the state legal entity. The second option will only occur if the **Legal Entity** field is filled in on the Client Master. If filled in, the system defaults the legal entity setting for the states to the legal entity used on the Client Master when the user saves the new state. Changes to the legal entity on the Client Master can affect existing states.

If a user changes the legal entity on the Client Master and saves the change, the system prompts the user with the following message:



If the user selects **Save Anyway**, the system updates the legal entity for all existing pricing states.

Note: When selecting a legal entity on the Client Master to use as the default, you should be sure to select a legal entity that has valid state legal entity records for all pricing states. Otherwise, the system will display an error that indicates that state-specific defaults could not be found. The Client Master legal entity default overrides the default process handled by the Contract Type.

If a pricing console is created by using the quick create Add State & Code approach and multiple codes are added to a single state, the system will create a single Pricing Batch State (PBS) record and the Pricing Comp Code (PCC) records will share the same PBS record. If a user edits an existing batch and adds more PCC records by uploading from a file to the pricing batch, the system checks the existing PBS records. If a PBS record already exists, the system associates the PCC record with the existing PBS record. If a PBS record does not already exist, the system associates the PCC record with a new PBS record.

Note: When adding a State & Code and generating pricing, the system defaults the manual rate to 0.0000 on the pricing comp code for the affected state if the contract type does not offer Workers' Comp and the Comp Model is N/A.

To add individual states and codes:

1. From the Pricing Console, in the **States and Codes** area, click **Add State & Code**. The Quick Edit dialog box opens.

Quick Edit ✕

| | |
|-----------------------------|---|
| * State | Florida |
| Comp Code | 9726 - ANIMAL SHELTER And DRIVERS (PREM |
| Pricing Code Location | Main (1) |
| * Pay Frequency | Weekly |
| * Gross Payroll | \$2,500.00 |
| * Full Time Employees | 2 |
| * Part Time Employees | 1 |
| | <input type="checkbox"/> Override Billing Adjustment Factors for this State |
| SUTA Bill Rate | 2.0000 |
| Client Modifier | 1 |
| Premium Discount (%) | 0.0000 |
| Current SUTA Rate | 0.7000 |
| Current Effective Comp Rate | |
| Net Comp Rate | |

Save **Save and New** Cancel

- Complete the fields and click **Save**. To add multiple entries, click **Save and New**. ClientSpace generates pricing behind the scenes and then displays the new entries in the Quick Create grid.

Quick Edit Fields

| Field | Description |
|--|--|
| State | <p>Select a state for pricing. After selecting a state, the system populates the following fields in the Quick Edit dialog box with the values set on the state:</p> <ul style="list-style-type: none"> ◦ Override Billing Adjustment Factors for this State ◦ SUTA Bill Rate ◦ Client Modifier ◦ Premium Discount (%) ◦ Current SUTA Rate |
| Comp Code | Select a master comp code. |
| Pricing Code Location | <p>Select a pricing code location from the supplied list of active locations for this workspace. If a client location is inactive, the system excludes the location from the drop-down list.</p> <p>Note: The Pricing Code Location field is inactive by default. The field only displays if active on the Pricing Comp Code form. If the Pricing Code Location field is active, you must select a value in the Comp Code field before you can select a value in the Pricing Code Location field. You can edit a location by selecting the location in the States and Codes area of the Pricing Console.</p> |
| Pay Frequency | Select a pay frequency. |
| Gross Payroll | Enter a dollar amount to indicate the gross payroll for the indicated pay frequency. |
| Full Time Employees | Enter the number of full time employees. |
| Part Time Employees | Enter the number of part time employees. |
| Override Billing Adjustment Factors for this State | <p>Select this check box to override the billing adjustment factors for the state indicted in the State field.</p> <p>Note: If this check box is selected, you can enter or edit a rate in the Client Modifier field and a percentage in the Premium Discount (%) field.</p> |
| SUTA Bill Rate | The system populates this field with the State Unemployment Tax Act (SUTA) |

| Field | Description |
|----------------------|---|
| | <p>bill rate for the state indicated in the State field. You can enter a number to change the SUTA bill rate for the state.</p> <p>Note:</p> <ul style="list-style-type: none"> ◦ The biz_EditSUTA_After_Submit security entity allows the user to edit the value in the SUTA Bill Rate field until Pricing is Locked. Once Pricing is Locked, the system does not allow a user to edit the SUTA Bill Rate. When a user edits the value in the SUTA Bill Rate field, the system triggers the Validate SUTA Discount rule. This rule validates that the new rate is within the discount threshold of the user editing the rate. ◦ Optionally, activate the UpdateSUTARateForCRS business rule in System Admin  > Advanced > Manage Rules to set the SUTA Billing Rate field using the SUTA Billing Rate field value from the State Legal Entity record. The rule uses the Pricing State in combination with the related Legal Entity and Contract Type to determine which State Legal Entity record to use. The rule is triggered when the SUTA - Client Report State checkbox on the State Master record is checked and the value in the SUTA Billing Rate field on the Pricing State record is cleared or the value in the Legal Entity field on the Pricing State record is changed. |
| Client Modifier | <p>The system populates this field with the client modifier value for the state indicated in the State field.</p> <p>Note: This field is available to edit if the Override Billing Adjustment Factors for this State check box is selected.</p> <p>You can enter a number to change the client modifier factor for the state.</p> |
| Premium Discount (%) | <p>The system populates this field with the premium discount percentage value for the state indicated in the State field.</p> <p>Note: This field is available to edit if the Override Billing Adjustment Factors for this State check box is selected.</p> <p>You can enter a number to change the premium discount percentage for the state.</p> |
| Current SUTA | <p>The system populates this field with the current State Unemployment Tax Act</p> |

| Field | Description |
|-----------------------------|---|
| Rate | (SUTA) rate for the state indicated in the State field. You can enter a number to change the current SUTA rate for the state. |
| Current Effective Comp Rate | Enter a number to enter the current effective comp rate. |
| Net Comp Rate | This field indicates the net comp rate. |

Note: Users can add multiple versions of the same State/Code combination both before and after pricing is generated.

Editing a Location from the Pricing Console

To edit a location from the Pricing Console:

Note: The Location field must be active in the Pricing Comp Code form for the Location field to be available in the pricing grid. The Location field is inactive by default.

1. From the Pricing Console, in the **States and Codes** area, review the Location column.

The screenshot shows the 'States and Codes' interface. At the top, there is a dropdown menu for 'All States' and two buttons: 'Pre-load' and 'Add State & Code'. Below this is a table with the following columns: State, Code, Location, Status, Gross Pay..., EEs (FT|PT), SUTA Rate, WC Rate, and Billing Ra... The table contains several rows of data. The first row is for FL with Code 8742FL and Location Main (1), which is highlighted with a red box. Other rows include GA with Code 8810GA and 8742GA, and HI with Code 8820HI. The table also has a pagination bar at the bottom showing '1 - 18 of 18 items'.

| State | Code | Location | Status | Gross Pay... | EEs (FT PT) | SUTA Rate | WC Rate | Billing Ra... |
|-------|--------|----------|--------------|--------------|-------------|-----------|---------|---------------|
| FL | 8742FL | Main (1) | Underwriting | 200000 | 3 2 | 2 | 0 | 11.3475 |
| GA | 8810GA | | Underwriting | 300000 | 5 1 | 2.3 | 0 | 10.718 |
| GA | 8742GA | | Underwriting | 400000 | 6 2 | 2.3 | 0 | 10.718 |
| HI | 8820HI | | Underwriting | 5000 | 1 1 | 1 | 0 | 14.65 |

2. Click the pricing code location name in the **Location** column.
The Client Location page displays.

3. Complete the fields and click **Save**.

Editing Surcharges

Users with appropriate access permissions can edit pricing fields on the Surcharges form before and after pricing has been submitted. Editing pricing fields on a surcharge record requires a user to have appropriate rights to access and edit the Surcharges form provided by the **gen_Surcharges** entity. If individual pricing fields are secured on the form, a user must have appropriate rights to access and edit those fields as well.

Note about deletions:

- If a user has not been assigned Delete rights for **gen_Surcharge**, the **Delete** button does not display.
- If a user has only been assigned **Delete** rights for **gen_Surcharge** but they do not also have rights to the security entity for the Surcharge Type, when they select the surcharge in the grid the **Delete** button appears dimmed and cannot be clicked. To delete a surcharge type that is flagged **Secured**, they must have **Delete** rights to the **gen_Surcharge** security entity and **Delete** rights to the security entity for each Surcharge Type they are allowed to **Delete**.

These entities will have a name format of **SurchargeType_<SurchargeType.SurchargeCode>**

Example: The secured Time and Attendance surcharge type entity might be named **SurchargeType_TA**.

This applies to all locations where the list of surcharges is accessed, including:

- The Pricing Console **Surcharges** section.
- The Surcharges Search form (which is accessed by clicking the **Surcharges** link on the Pricing Batch.)

After pricing has been submitted, the ability to edit pricing on a surcharge record up until pricing is locked requires a supplemental security entity, **biz_EditSurcharge_After_Submit**, with either **View** or **Admin** rights assigned.

Once the appropriate rights are assigned, the following pricing fields can be changed on the Surcharges form after pricing is submitted up until pricing is locked:

- Surcharge Type
- Quantity - The presence of this field varies by **Surcharge Type** and may not always display.
- Override Surcharge Amt
- Surcharge Amt - Requires user to click **Override Surcharge Amt** checkbox to access the field.

In the example below, the **gen_Surcharges** entity allows **View**, **Add**, and **Edit** rights to the Surcharges form and the **biz_EditSurcharge_After_Submit** entity is set to **View** access. A user in a role with entities configured as shown has access to edit surcharge pricing fields after pricing is submitted (assuming that there are no field-level security restrictions in place on any of the surcharge pricing fields):

| Entity Name ↑ | View | Add | Edit | Delete | Admin |
|--------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| biz_EditSurcharge_After_Submit | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| gen_Surcharges | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

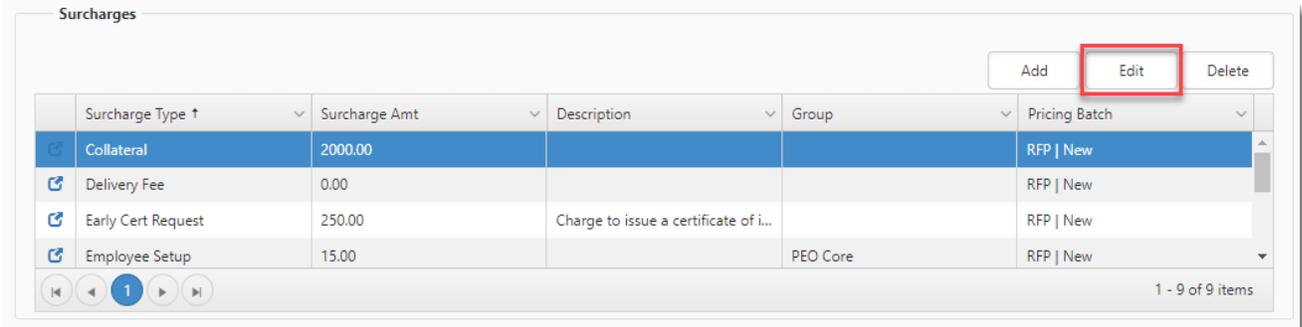
In the next example, a user in a role with entities configured as shown does NOT have access to edit surcharge pricing fields after pricing is submitted because, while the **biz_EditSurcharge_After_Submit** entity is correctly configured, the **gen_Surcharges** entity is not configured to allow editing of fields on the Surcharges form:

| Entity Name ↑ | View | Add | Edit | Delete | Admin |
|--------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|
| biz_EditSurcharge_After_Submit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| gen_Surcharges | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Note: By default, Global Administrators can edit surcharge pricing fields up until pricing is locked without this entity assigned.

To edit a surcharge record from the Pricing Console after pricing is submitted:

1. From the Pricing Console, in the **Surcharges** area, select a surcharge record and click **Edit** OR click **Open** next to a surcharge in the grid.

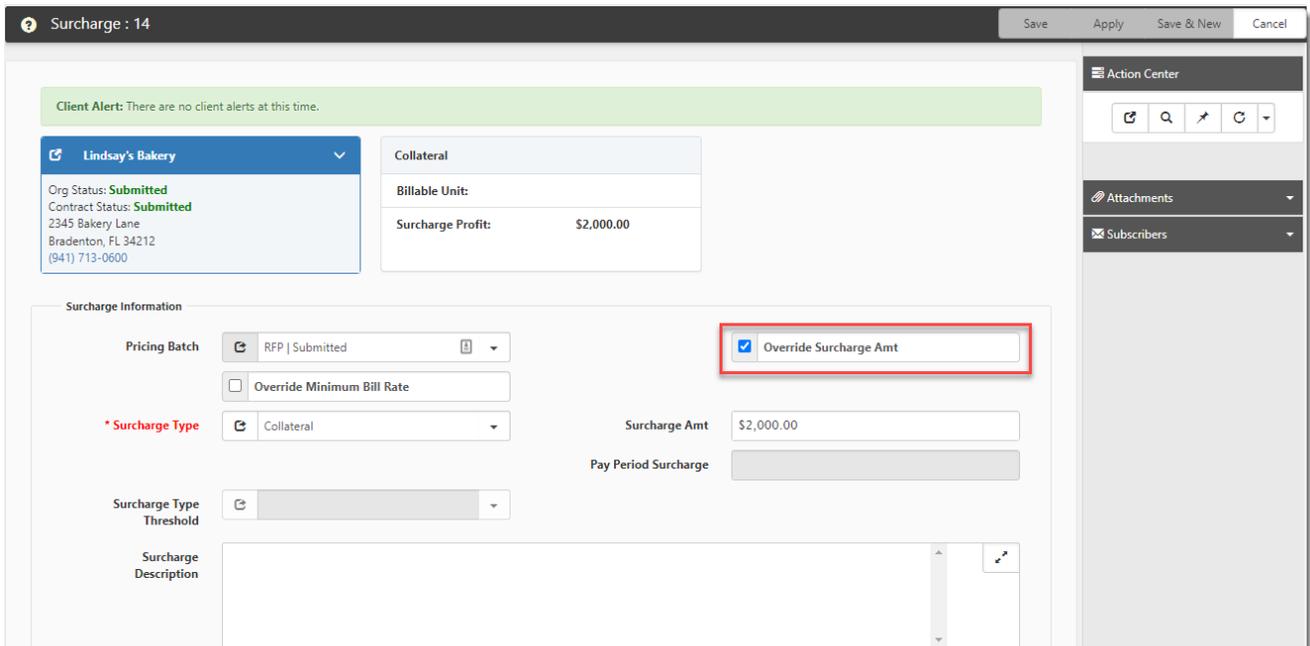


The screenshot shows a table titled "Surcharges" with the following columns: Surcharge Type, Surcharge Amt, Description, Group, and Pricing Batch. The first row is selected and highlighted in blue. The "Edit" button in the top right corner is highlighted with a red box.

| Surcharge Type | Surcharge Amt | Description | Group | Pricing Batch |
|--------------------|---------------|---------------------------------------|----------|---------------|
| Collateral | 2000.00 | | | RFP New |
| Delivery Fee | 0.00 | | | RFP New |
| Early Cert Request | 250.00 | Charge to issue a certificate of i... | | RFP New |
| Employee Setup | 15.00 | | PEO Core | RFP New |

The Surcharges window opens.

2. Edit the desired fields. (Click the **Override Surcharge Amt** checkbox to edit **Surcharge Amt**.)



The screenshot shows the "Surcharge : 14" edit form. The "Override Surcharge Amt" checkbox is checked and highlighted with a red box. The "Surcharge Amt" field is set to \$2,000.00. The "Pricing Batch" is set to "RFP | Submitted".

Client Alert: There are no client alerts at this time.

Lindsay's Bakery
 Org Status: **Submitted**
 Contract Status: **Submitted**
 2345 Bakery Lane
 Bradenton, FL 34212
 (941) 713-0600

Collateral
 Billable Unit:
 Surcharge Profit: \$2,000.00

Surcharge Information

Pricing Batch: RFP | Submitted
 Override Minimum Bill Rate

* Surcharge Type: Collateral

Surcharge Type Threshold: [Dropdown]

Surcharge Description: [Text Area]

Surcharge Amt: \$2,000.00
 Pay Period Surcharge: [Field]

Override Surcharge Amt

3. Click **Save**.

Using the Bulk Approach

Creating pricing in ClientSpace is just a drag and drop away. Instead of manually entering your pricing data, you can drag a preformatted CSV file containing the pricing information onto the pricing console and let ClientSpace do the work for you.

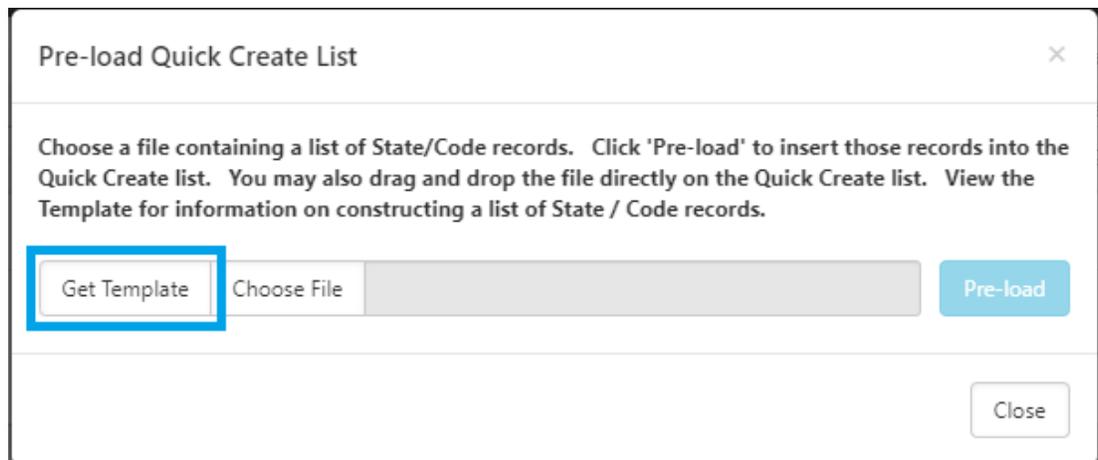
The bulk approach involves editing a preformatted file (**quick_create_preload_template.csv**) to reflect States, Codes, Pay Frequency, Wages, and Employee counts. The file is available in the Help system ([Quick Create Template](#)) and through the Pricing Console. Next, you upload the edited file and then generate pricing. Additionally, when changes occur, you can edit the data and upload the file again. See [Re-uploading pricing data](#).

Step 1: Edit the preformatted file

If your administrator has **not** edited the pricing file, you can download the CSV file to complete it. If you already have an edited file, go to [Step 2: Drag or upload the edited file](#).

To download and edit the preformatted file:

1. From the modules bar, click **Q Pricing**. The Pricing dashboard opens.
2. Select a workspace and click **Open**. The pricing console opens.



3. In **Quick Create**, click **Pre-load**. The Pre-load Quick Create List dialog box opens.
4. Click **Get Template**. The template file downloads.
5. Open the template file and edit. Add as many entries as required that contain the following data:
 - State
 - Code

- PayFrequency
- GrossPayroll
- FullTimeEmployees
- PartTimeEmployees
- SUTA
- CurrentEffectiveCompRate
- PricingLocationCode

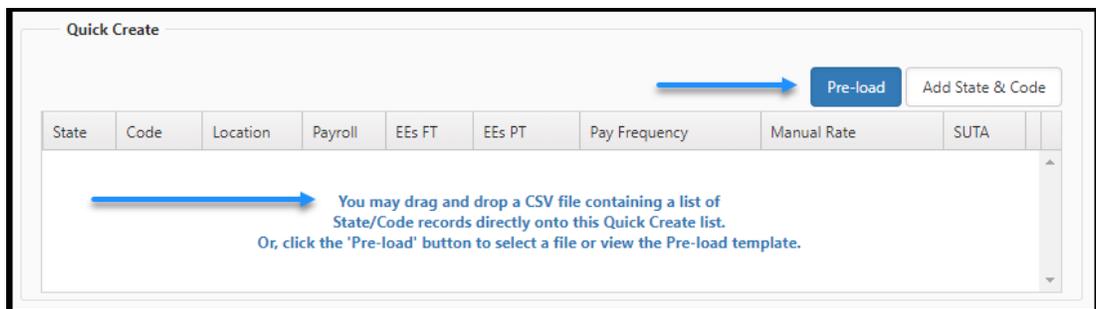
```
//
//First valid line MUST be exactly:
State Code PayFrequency GrossPayroll FullTimeEmployees PartTimeEmployees SUTA CurrentEffectiveCompRate PricingLocationCode
FL 8810 Weekly 100000 2 1 0.7 1.1 LocationCode1
//Comments can be inserted on any line but must not be mixed with data
FL 8742 Weekly 200000 3 2 0.7 1.1 LocationCode2
```

6. Save the file.

If the Get Template option is not available, your administrator must upload the template file on the Admin Workspace PEO Configuration page in the Quick Create Pre-load Template field. For help with this, create an Extranet case.

Step 2: Drag or upload the edited file

You can make the edited file available to ClientSpace by dragging the file onto the Quick Create area, **or** you can use **Pre-load** to upload the file. The following procedures show you how, using both approaches.



To drag the file onto the Quick Create area:

1. Open file explorer and drag the file onto the **Quick Create** pricing area.

From Scratch Bakery Pricing Console

Company Information

| State | Code | Location | Payroll | EEs FT | EEs PT | Pay Frequency |
|-------------------------------------|------|----------|---------|--------|--------|---------------|
| <input type="button" value="Edit"/> | | | | | | |

* Legal Name: FEIN:

Contract Type: Pay Frequency:

Description of Operations:

Quick Create

| State | Code | Location | Payroll | EEs FT | EEs PT | Pay Frequency | Manual Rate | SUTA |
|---|------|----------|---------|--------|--------|---------------|-------------|------|
| <p>You may drag and drop a CSV file containing a list of State/Code records directly onto this Quick Create list. Or, click the 'Pre-load' button to select a file or view the Pre-load template.</p> | | | | | | | | |

Note: If any of the records are missing required information, the system displays a message to indicate the problem.

Quick Create Pre-load

2 State/Code records are missing required information. Please correct all errors before continuing.

If this message displays, correct the issues before continuing.

- a. Click **OK**.

The system displays the file data in the **Quick Create** grid and highlights the rows in red.

Note: The location field only displays if the pricing location field is active on the pricing comp code.



| State | Code | Location | Payroll | EEs FT | EEs PT | Pay Frequency | Manual Rate | SUTA | |
|-------|--------------------|----------|---------|--------|--------|---------------|-------------|------|---|
| FL | 8810 - Clerical | | 100000 | 2 | 1 | Weekly | 1.1 | 0.7 |  |
| FL | 8742 - Salesper... | | 200000 | 3 | 2 | Weekly | 1.1 | 0.7 |  |

- b. Click  (Jump) for a row that the system highlighted in red.
The system displays the **Quick Edit** window.

Quick Edit ✕

*** State** Florida ▼

*** Comp Code** 8742 - Salespersons, Collectors or Messenge ▼

Pricing Code Location 0 ▼

*** Pay Frequency** Weekly ▼

*** Gross Payroll** 200000

*** Full Time Employees** 3

*** Part Time Employees** 2

Current SUTA Rate 0.7

Current Effective Comp Rate 1.1

- c. Correct the error(s) in the **Quick Edit** window and click **Save**.
- d. Repeat as necessary to correct all errors before continuing.

If there are no errors with the file data, the system displays the file data in the **Quick Create** grid.

Quick Create

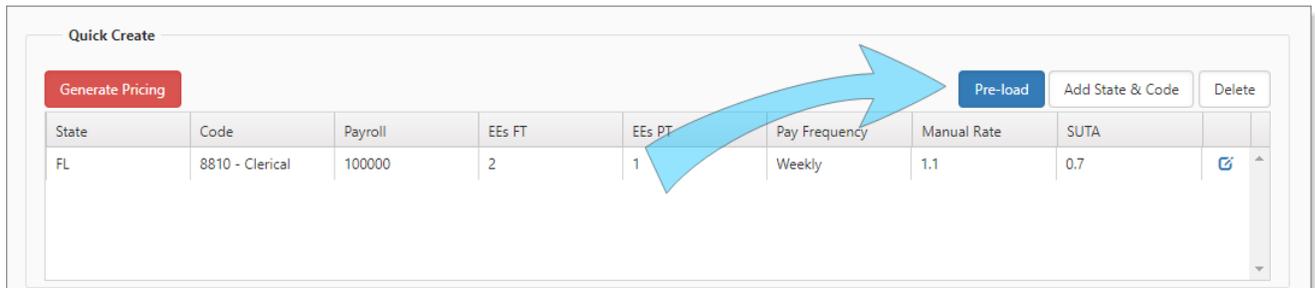
| State | Code | Location | Payroll | EEs FT | EEs PT | Pay Frequency | Manual Rate | SUTA | |
|-------|--------------------|----------|---------|--------|--------|---------------|-------------|------|--|
| FL | 8810 - Clerical | Main (1) | 100000 | 2 | 1 | Weekly | 1.1 | 0.7 | |
| FL | 8742 - Salesper... | Main (1) | 200000 | 3 | 2 | Weekly | 1.1 | 0.7 | |

Now, you are ready to generate pricing. Go to [Step 3: Generate Pricing](#).

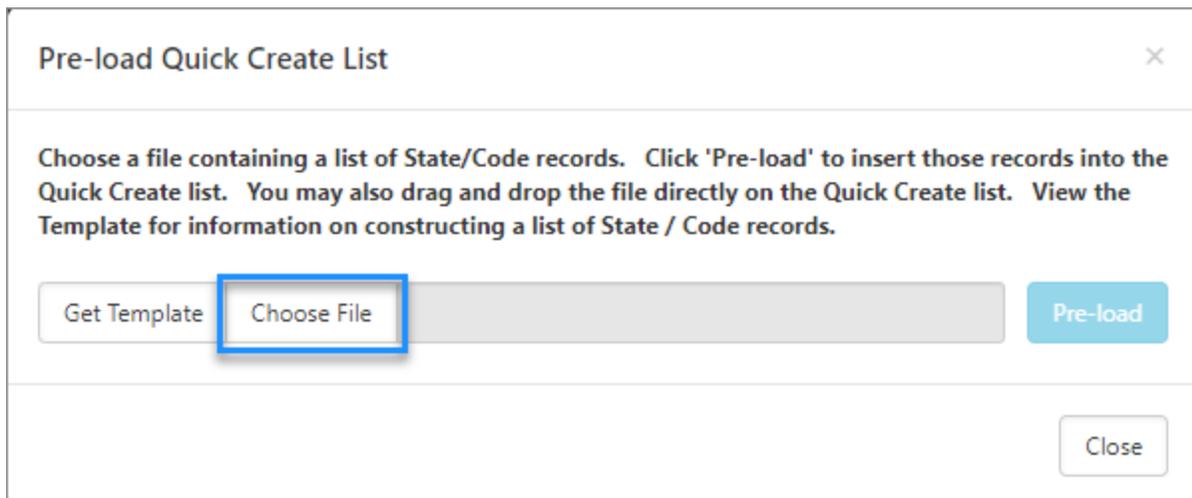
If you do not use the drag method, you can upload the pricing file using **Pre-load**.

To upload the pricing file to ClientSpace:

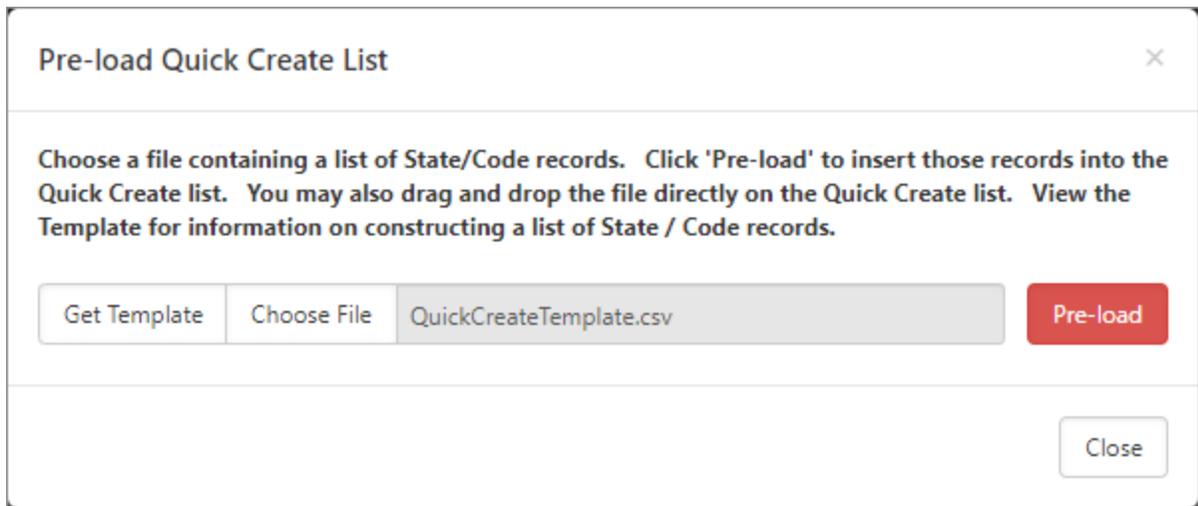
1. From the Pricing Console, in **Quick Create**, click **Pre-load**.



The Pre-load Quick Create List dialog box opens.

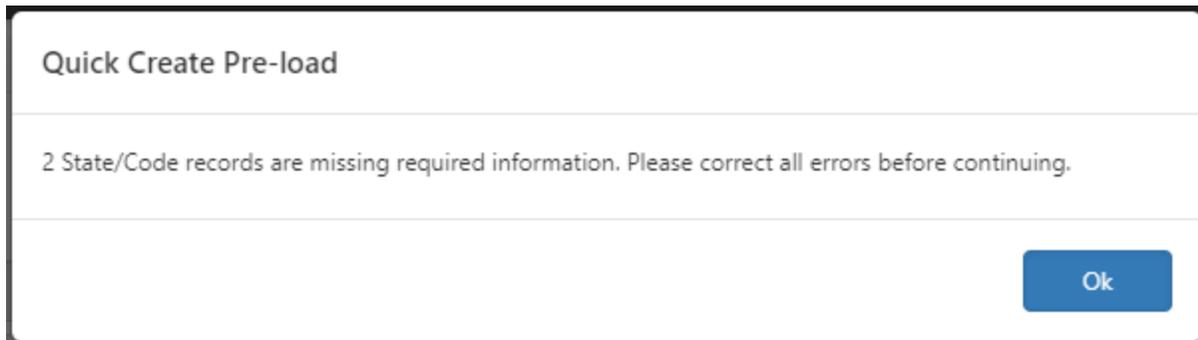


2. Click **Choose File**.
File Explorer opens.
3. Locate the file and click **Open**.
The file appears in the Choose File box.



4. Click **Pre-load**.

Note: If any of the records are missing required information, the system displays a message to indicate the problem.

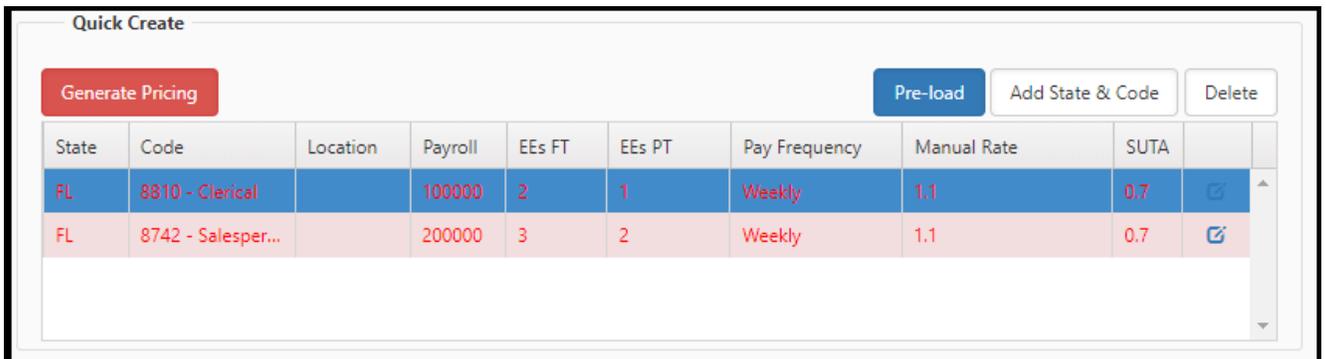


If this message displays, correct the issues before continuing.

- a. Click **OK**.

The system displays the file data in the **Quick Create** grid and highlights the rows in red.

Note: The location field only displays if the pricing location field is active on the pricing comp code.



| State | Code | Location | Payroll | EEs FT | EEs PT | Pay Frequency | Manual Rate | SUTA | |
|-------|--------------------|----------|---------|--------|--------|---------------|-------------|------|---|
| FL | 8810 - Clerical | | 100000 | 2 | 1 | Weekly | 1.1 | 0.7 |  |
| FL | 8742 - Salesper... | | 200000 | 3 | 2 | Weekly | 1.1 | 0.7 |  |

- b. Click  (Jump) for a row that the system highlighted in red.
The system displays the **Quick Edit** window.

Quick Edit ✕

*** State** Florida ▼

*** Comp Code** 8742 - Salespersons, Collectors or Messenge ▼

Pricing Code Location 0 ▼

*** Pay Frequency** Weekly ▼

*** Gross Payroll** 200000

*** Full Time Employees** 3

*** Part Time Employees** 2

Current SUTA Rate 0.7

Current Effective Comp Rate 1.1

- c. Correct the error(s) in the **Quick Edit** window and click **Save**.
- d. Repeat as necessary to correct all errors before continuing.

If there are no errors with the file data, the system displays the file data in the **Quick Create** grid.

Quick Create

| State | Code | Location | Payroll | EEs FT | EEs PT | Pay Frequency | Manual Rate | SUTA | |
|-------|--------------------|----------|---------|--------|--------|---------------|-------------|------|--|
| FL | 8810 - Clerical | Main (1) | 100000 | 2 | 1 | Weekly | 1.1 | 0.7 | |
| FL | 8742 - Salesper... | Main (1) | 200000 | 3 | 2 | Weekly | 1.1 | 0.7 | |

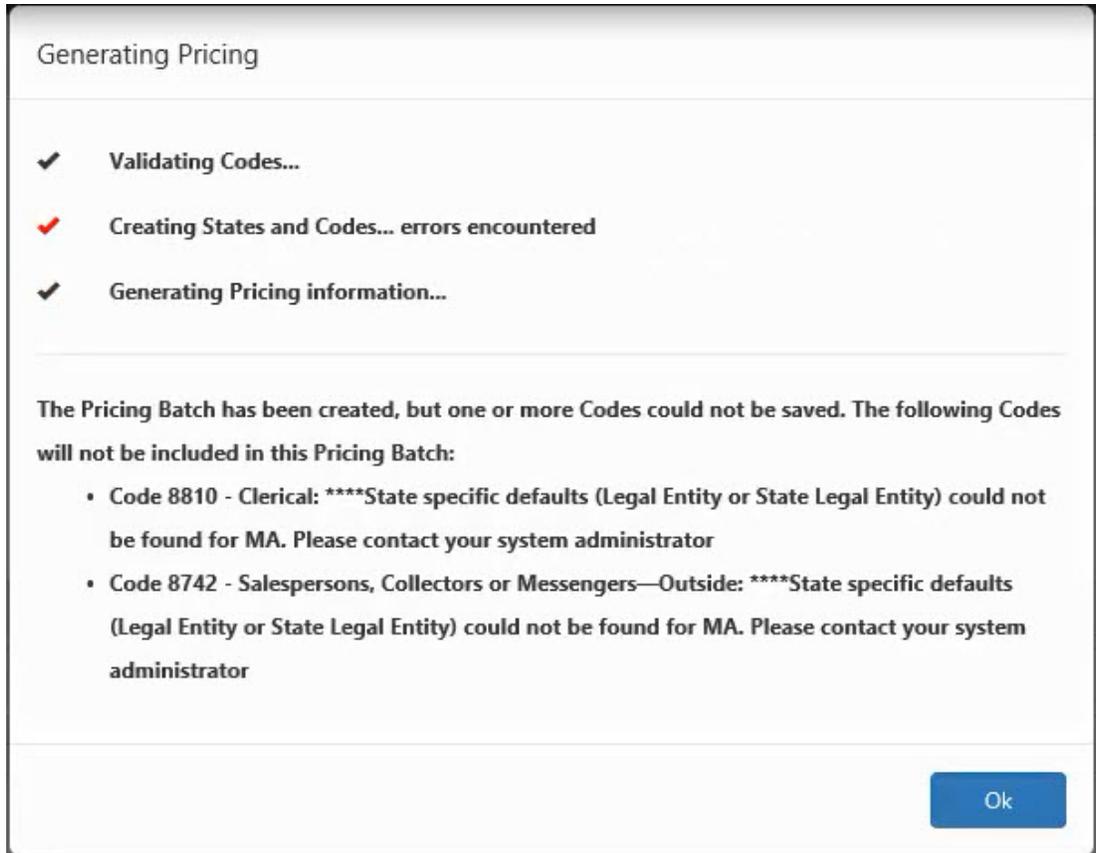
Now, you are ready to generate pricing. Go to [Step 3: Generate Pricing](#).

Step 3: Generate Pricing

With the file inserted in the grid, you are ready to generate pricing.

To generate pricing:

- Click **Generate Pricing**. This action builds pricing based on the configured settings and policies. While ClientSpace processes your pricing, the progress displays. Any errors found with your submission are also displayed.
- When the build completes, a synopsis of your pricing is displayed. You may need to take action if you receive any errors.
- Click **Ok**.



Override Batch in Repricing

Occasionally, when pricing is running an error occurs and the Batch in Repricing checkbox is selected and locked for a batch. A user cannot proceed with repricing while the batch is in this state. A user in a role that contains the `can_override_batchinpricing` security entity with View rights can unlock the batch by selecting the Override 'Batch in Repricing' link on the batch.

Complete the following procedure to unlock a batch.

1. From the modules bar, click **Q Pricing**.
The Pricing dashboard opens.
2. Select a workspace and click **🔗 (Open)**.
The pricing console opens.
3. Select the Pricing Batch
4. Click the **Override 'Batch in Repricing'** link in the Action Center.
After selecting the **Override 'Batch in Repricing'** link, the system deselects the Batch in Repricing checkbox.

Note: Before a user can access this link, a Global Admin user must add the `can_override_batchinpricing` security entity with View rights to a role associated with the user.

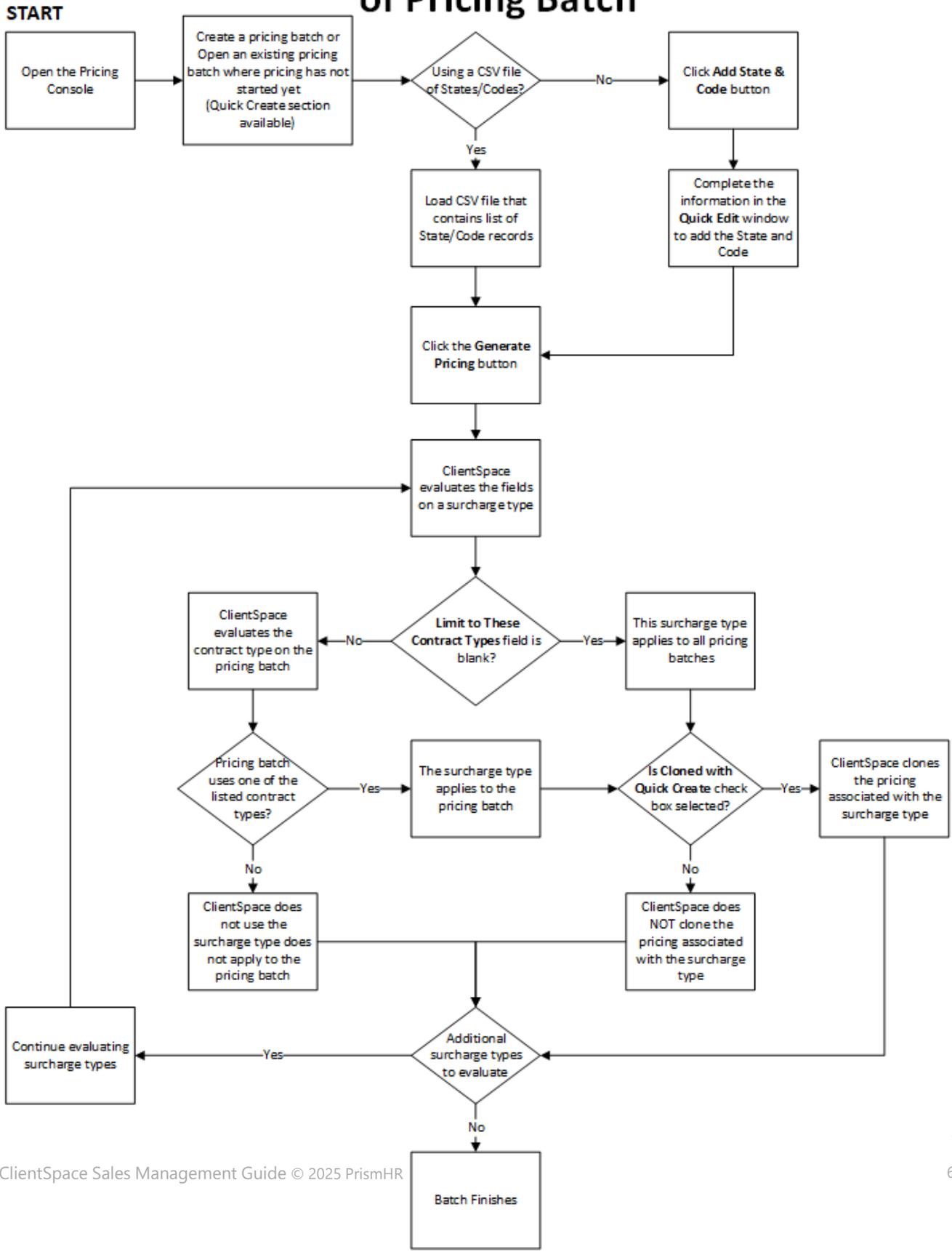
Surcharge Types

Surcharge types determine either one-time or recurring surcharge fees to associate with a pricing batch.

A ClientSpace admin user can set up surcharge types to clone surcharges during the Quick Create process by using the Pricing Console. Alternatively, an admin user can set up workflow to clone surcharges. See [Cloning Surcharges with Workflow Channels](#).

The following flowchart illustrates how the system determines whether to use a surcharge type and whether to clone surcharges during the Quick Create process by using the Pricing Console.

Cloning Surcharges During Quick Create of Pricing Batch



To create or edit a surcharge type:

1. Go to **System Admin** > **Administrative Data** > **Surcharge Type**.
The **Surcharge Type** dashboard opens.

| Surcharge Type ↑ | Surcharge Code | Surcharge Group | Limit to these Contract Types | Default Bill Rate | Minimum Bill Rate | Recurring | Commissionable |
|-----------------------|----------------|-----------------|-------------------------------------|-------------------|-------------------|-----------|----------------|
| Collateral | COLLATERAL | | PEO 2 - Use ACME Domestic LE/... | 2000 | | One Time | No |
| Delivery Fee | DEL | | PEO 2 - Use ACME Domestic LE/... | 0 | | Weekly | No |
| Early Cert Request | EarlyCert | | | 250 | 250 | One Time | No |
| Employee Setup | ES | PEO Core | PEO - Use State Master LE/WC | 15 | 12.22 | One Time | No |
| EPLI Per Employee | EPLI | | HRO, PEO - Use State Master LE... | 1 | 0.25 | Weekly | No |
| Group Life | GRLIFE | | PEO - Use State Master LE/WC | 1.88 | 1.88 | Weekly | No |
| Laser Check Printing | LaserChk | | ASO - Use ACME ASO/Use Clie... | 1 | 1 | Monthly | No |
| Med Malpractice | MedMal | ASO | HRO | 50 | 0 | Monthly | No |
| Medical Only Claim | MEDONLY | | | 500 | | One Time | No |
| Min WC Per Employe... | MINWCperEE | | PEO - Use State Master LE/WC | 100 | | One Time | No |
| Minimum Admin Fee ... | 006M | | HRO, Jesse Special, PEO - Use St... | 50 | 50 | Weekly | No |
| Minimum WC Fee Per... | WCMINM | | HRO, PEO 2 - Use ACME Domes... | 400 | 400 | Monthly | No |
| Minimum WC Fee Per... | WCMINW | | HRO, Jesse Special, PEO - Use St... | 100 | 100 | One Time | No |

2. Click the **Add** button to create a new surcharge type
Or
Search for a surcharge type, select the surcharge type, and click the **Edit** button to edit an existing surcharge type.

The following graphic illustrates the **Surcharge Type Information** section for a new surcharge type.

Surcharge Type Information

* Surcharge Type

* Surcharge Code

Surcharge Group

Recurring

Minimum Bill Rate

Default Bill Rate

Surcharge Description

Include In Profitability

Per EE / Frequency

Commissionable

Is Cloned with Pricing Renewals

Is Cloned with Quick Create

Sort Order

Use Thresholds

Cost for Profitability

Billable Unit

Hide in Surcharge Quick Selector

Secured

EntityRowGUID

Limit to these Contract Types

Active

The following graphic illustrates the **Surcharge Type Information** and the **Administrative Fields** sections when editing an existing surcharge type.

Surcharge Type Information

| | |
|--|--|
| <p>* Surcharge Type <input type="text" value="Employee Setup"/></p> <p>Surcharge Group <input type="text" value="PEO Core"/></p> <p>Minimum Bill Rate <input type="text" value="\$12.22"/></p> <p>Surcharge Description <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div></p> <p><input checked="" type="checkbox"/> Include In Profitability</p> <p><input checked="" type="checkbox"/> Per EE / Frequency</p> <p><input type="checkbox"/> Commissionable</p> <p><input type="checkbox"/> Is Cloned with Pricing Renewals</p> <p><input checked="" type="checkbox"/> Is Cloned with Quick Create</p> <p>Sort Order <input type="text"/></p> <p>Use Thresholds <input type="text" value="No"/></p> | <p>* Surcharge Code <input type="text" value="ES"/></p> <p>Recurring <input type="text" value="One Time"/></p> <p>Default Bill Rate <input type="text" value="\$15.00"/></p> <p>Cost for Profitability <input type="text" value="\$10.00"/></p> <p>Billable Unit <input type="text"/></p> <p><input type="checkbox"/> Hide in Surcharge Quick Selector</p> <p><input type="checkbox"/> Secured</p> <p>EntityRowGUID <input type="text"/></p> <p>Limit to these Contract Types <input type="text" value="PEO - Use State Master LE/WC"/></p> |
|--|--|

Administrative Fields

| | |
|---|--|
| <p>Date Created <input type="text" value="1/10/2019 3:42 pm"/></p> <p>Date Updated <input type="text" value="1/13/2021 1:48 pm"/></p> <p>Import ID <input type="text" value="ES"/></p> | <p>Created By <input type="text" value="Maker, Rain"/></p> <p>Updated By <input type="text" value="Maker, Rain"/></p> <p>* Workspace <input type="text" value="Admin Workspace"/></p> |
|---|--|

Active

3. Complete the information in the **Surcharge Type Information** section

| | |
|---------------------------|---|
| Surcharge Type (Required) | Enter a value to use as a label for identifying the surcharge type. |
| Surcharge Code (Required) | Enter a value to use as an identity code for the surcharge type. |
| Surcharge Group | Enter a value that can be used to categorize surcharges into groups. |
| Recurring | Enter a value to indicate a one time cost or a recurring charge at differing intervals. |

| | |
|---------------------------------|---|
| Minimum Bill Rate | Enter a value to indicate the minimum a surcharge can be set to cost wise. |
| Default Bill Rate | Enter a value to indicate the cost that the surcharge is set to when added initially. |
| Surcharge Description | Enter text that describes the surcharge type. |
| Include In Profitability | Determines if the surcharge will be included in the Gross Profit in the pricing breakdown. |
| Cost for Profitability | If the surcharge type is included in profitability, use this cost field along with the given Recurrence Metadata to determine the true profit before adding to the pricing console. If left blank, assume that it would all be profit. |
| Per EE / Frequency | If this box is checked for the associated Recurrence, it not only calculates based on the Recurrences Per Year value, but also the total number of employees in the pricing console (when the Include in Profitability field is also checked). |
| Commissionable | Determines if the billed amount included in the commissionable amount for the sales person |
| Is Cloned with Pricing Renewals | Check this box to copy this surcharge to the new Pricing Batch during the renewal process, but only if it exists in the current Pricing Batch. |
| Secured | Selecting Secured allows a Global Administrator to define user roles that determine other users' access rights related to the surcharge type. For instance, if a user is in a role with Delete rights to the gen_surcharges security entity, they have sufficient rights to delete a surcharge that is NOT flagged Secured . To delete a surcharge that IS flagged Secured , they must have Delete rights to the gen_surcharges security entity AND Delete rights to the security entity for each surcharge type they are allowed to Delete. For example, biz_surcharges_clientsetup is |

| | |
|-------------------------------|---|
| | the security entity for the Client Setup surcharge. If the Client Setup surcharge was flagged as a Secured surcharge, to delete a Client Setup surcharge, they must be assigned Delete rights to both gen_surcharges and biz_surcharges_clientsetup . |
| Is Cloned with Quick Create | Check this box to automatically create this surcharge when you select the Generate Pricing button during Quick Create on the Pricing dashboard. |
| Sort Order | What order are the surcharges in when adding them on the add index |
| EntityRowGUID | Filled in when secured, is a reference to the entity row record |
| Limit to these Contract Types | Select one or more contract types to indicate the contract types that allow this surcharge type. If this field is blank, all contract types use this surcharge type. |

4. Click **Apply** to save changes to the **Surcharge Type Information** section.
5. Click **Save, Apply**, or **Save & New**.

Downloading pricing data

After you have generated the initial pricing, you may need to generate pricing again from time-to-time because numbers change. For example, employee numbers can fluctuate, which then changes the payroll numbers. You can download the pricing data to a CSV file, update the CSV file, then re-upload the pricing data.

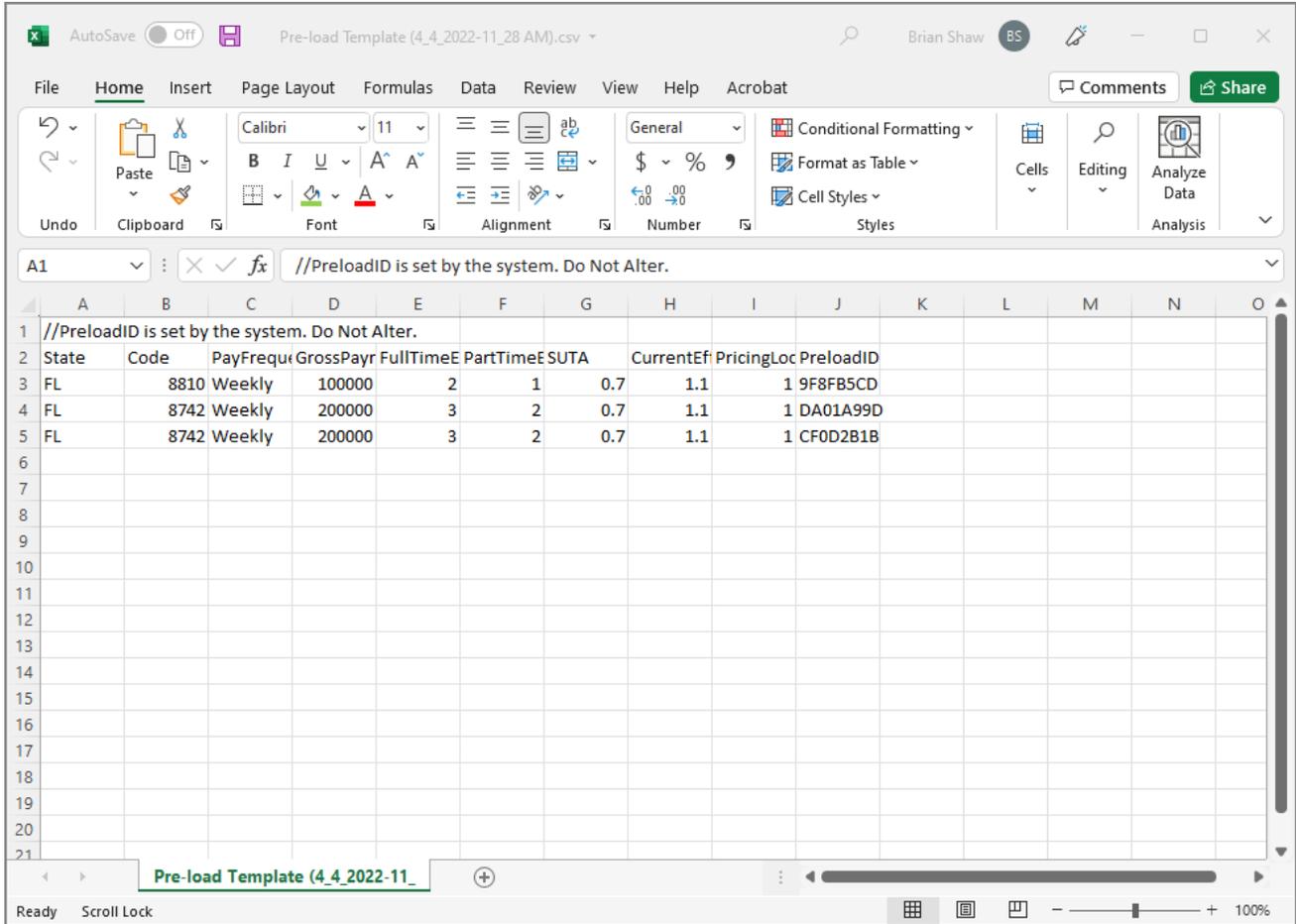
The downloaded CSV file includes a generated identifier "Preloadid". You can edit the file and upload the file. The system will use the generated Preloadid to match records to update. If you add any new rows in the edited CSV file that do not include a PreloadID, the system will insert a new record for each of those rows when you re-upload the pricing data. The system will reject any Rows that have a Preloadid that does not match any existing records.

When you download the pricing data, the system saves a local CSV file with the following naming convention:

Pre-load Template (DD_MM_YYYY-HH_MM XM).csv

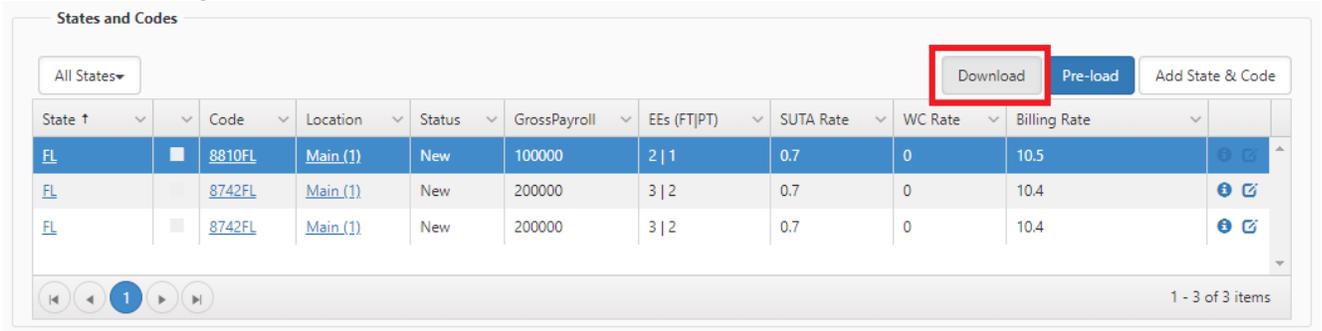
For example, a file downloaded on April 4th 2022 at 11:28 AM would be: Pre-load Template (4_4_2022-11_28 AM).csv

The following graphic illustrates an example of a file.



To download the data:

1. From the Pricing Console, in the **States and Codes** area, click **Download**.

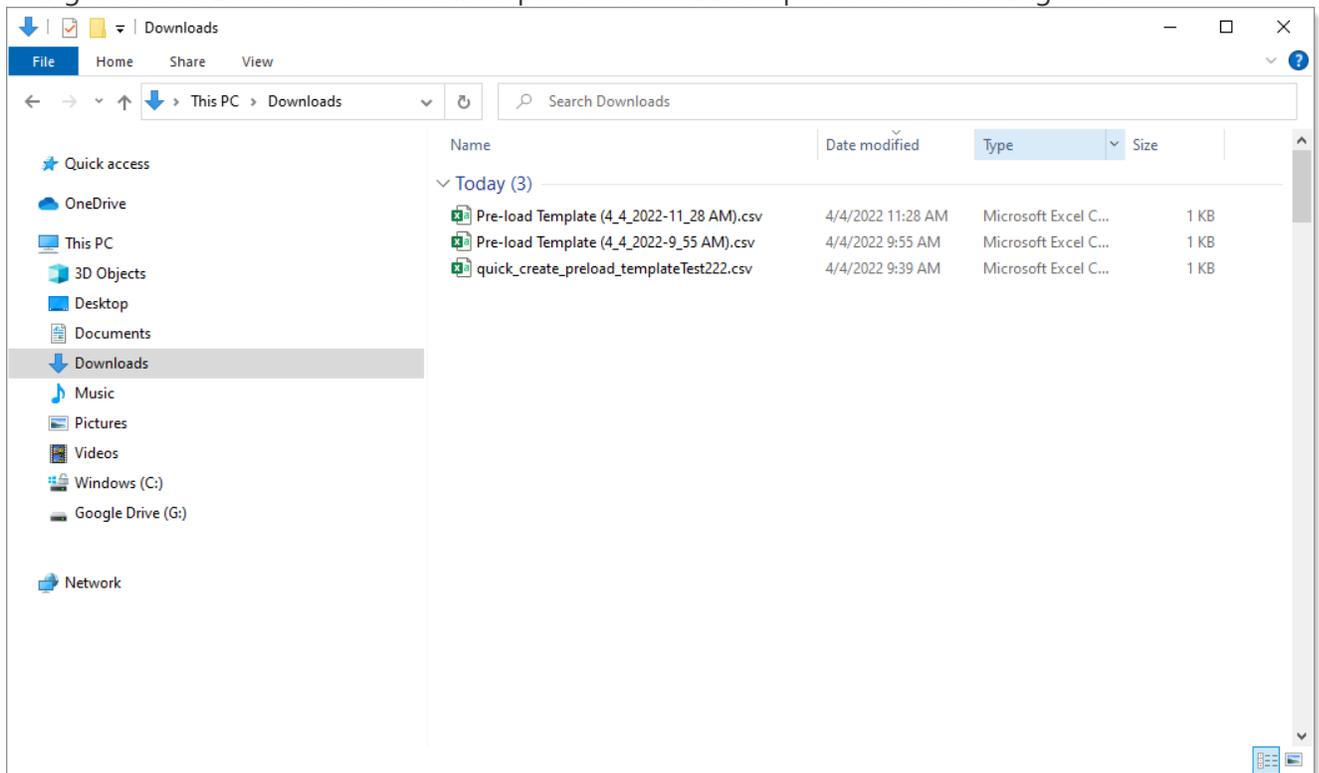


The screenshot shows the 'States and Codes' interface. At the top right, there are three buttons: 'Download' (highlighted with a red box), 'Pre-load', and 'Add State & Code'. Below the buttons is a table with the following data:

| State | Code | Location | Status | Gross Payroll | EEs (FT PT) | SUTA Rate | WC Rate | Billing Rate |
|-------|--------|----------|--------|---------------|-------------|-----------|---------|--------------|
| FL | 8810FL | Main (1) | New | 100000 | 2 1 | 0.7 | 0 | 10.5 |
| FL | 8742FL | Main (1) | New | 200000 | 3 2 | 0.7 | 0 | 10.4 |
| FL | 8742FL | Main (1) | New | 200000 | 3 2 | 0.7 | 0 | 10.4 |

At the bottom right of the interface, it says '1 - 3 of 3 items'.

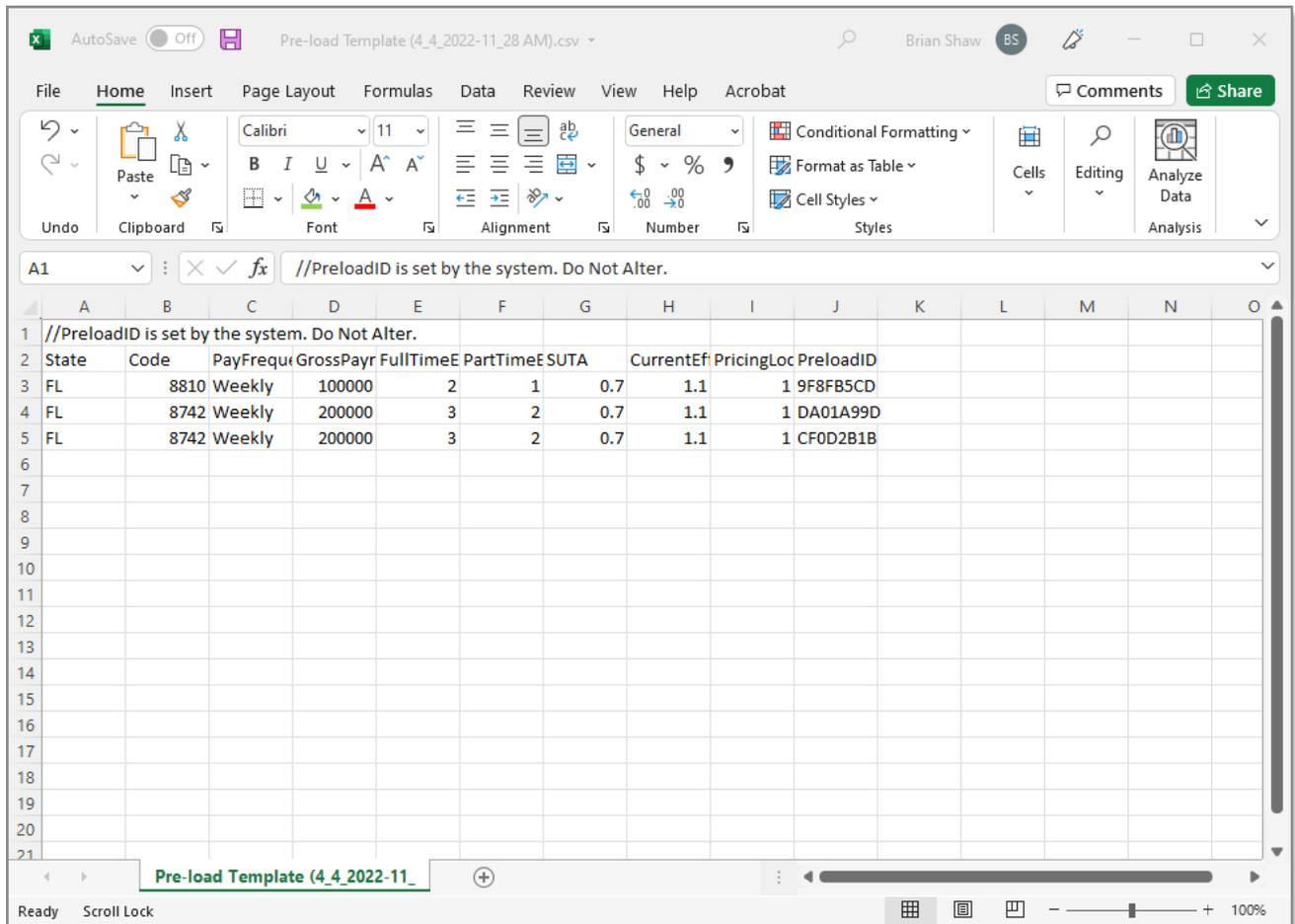
2. Navigate to the Downloads folder and open the Preload Template with the Pricing data.



The screenshot shows a Windows File Explorer window titled 'Downloads'. The address bar shows 'This PC > Downloads'. The left sidebar shows the 'Downloads' folder selected. The main pane displays a list of files:

| Name | Date modified | Type | Size |
|---|-------------------|----------------------|------|
| Today (3) | | | |
| Pre-load Template (4_4_2022-11_28 AM).csv | 4/4/2022 11:28 AM | Microsoft Excel C... | 1 KB |
| Pre-load Template (4_4_2022-9_55 AM).csv | 4/4/2022 9:55 AM | Microsoft Excel C... | 1 KB |
| quick_create_preload_templateTest222.csv | 4/4/2022 9:39 AM | Microsoft Excel C... | 1 KB |

3. Edit the data in the CSV file as necessary. For example, you can edit an existing row or add a new row.



Note: If you enter a new row, do NOT include an identifier in the PreloadID column. If you enter an identifier in the PreloadID column and that PreloadID does not exist, the system will reject the row. Leave the PreloadID column blank for any new rows that you create.

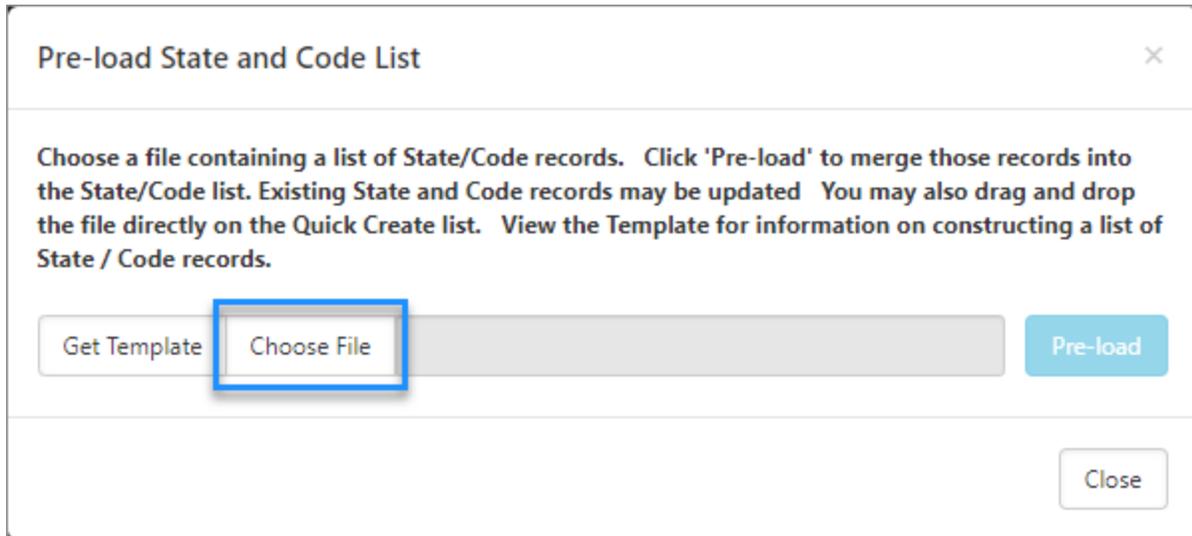
4. Save changes to the CSV file.
5. Re-upload the pricing data. See [Re-uploading pricing data](#).

Re-uploading pricing data

After you have generated the initial pricing, you may need to generate pricing again from time-to-time because numbers change. For example, employee numbers can fluctuate, which then changes the payroll numbers. Re-uploading the pricing data file makes this process very easy. Before you re-upload pricing data, you can download the existing pricing data and then update the data in the downloaded CSV file. See [Downloading pricing data](#).

To re-upload the data:

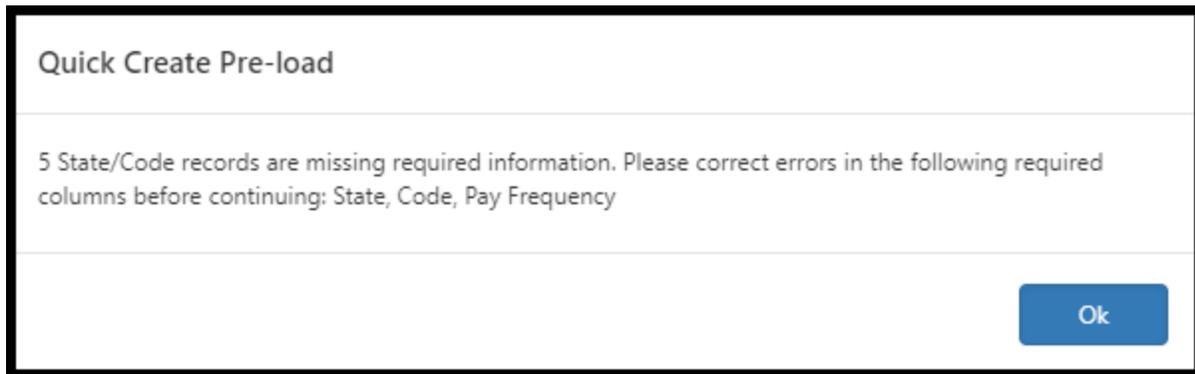
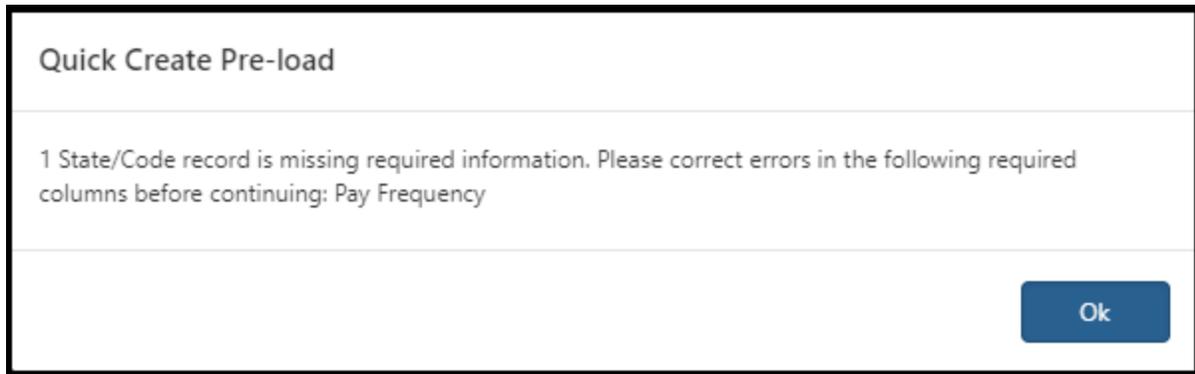
1. From the Pricing Console, in the **States and Codes** area, click **Pre-load**.
The Pre-load State and Code List dialog box opens.



2. Click **Choose File**.
File Explorer opens.
3. Locate the file and click **Open**.
The file appears in the Choose File box.
4. Click **Pre-load**.
For data that is missing or invalid, the pre-load process displays an informative message that requires action when returning to the grid.

The following graphics illustrate examples of messages that the system might display when additional action is required.





5. Click **Ok** to close the message.

You are returned to the Pricing Console. The newly uploaded row appears in a different grid, States and Codes Pre-load Worksheet, for reviewing the data, potentially correcting and re-uploading, and merging when ready. In our example, we have an entry with red text and yellow background, which indicates the data already exists, and we need to determine if a merge is a correct action.

| States and Codes Pre-load Worksheet | | | | | | | | | |
|-------------------------------------|-------|-----------------|---------|------------------|--------|---------------|-------------|------|--|
| Merge All | | Merge Selected | | Add State & Code | | Delete | Cancel | | |
| | State | Code | Payroll | EEs FT | EEs PT | Pay Frequency | Manual Rate | SUTA | |
| | FL | 8810 - Clerical | 150000 | 3 | 3 | Weekly | 1.1 | 0.7 | |

Note: If you click Cancel to fix the errors or problems with the data in the CSV file, the system clears the values cached in the State and Codes Pre-load Worksheet. After fixing issues with the data in the CSV file, you can try to re-upload the data again and then proceed with the merge steps.

6. To merge all data when you have multiple entries in the grid, click **Merge All**.
7. To merge only the selected row, click **Merge Selected**.

Interpreting the results of the inserted data

The following table explains the results of the re-upload process.

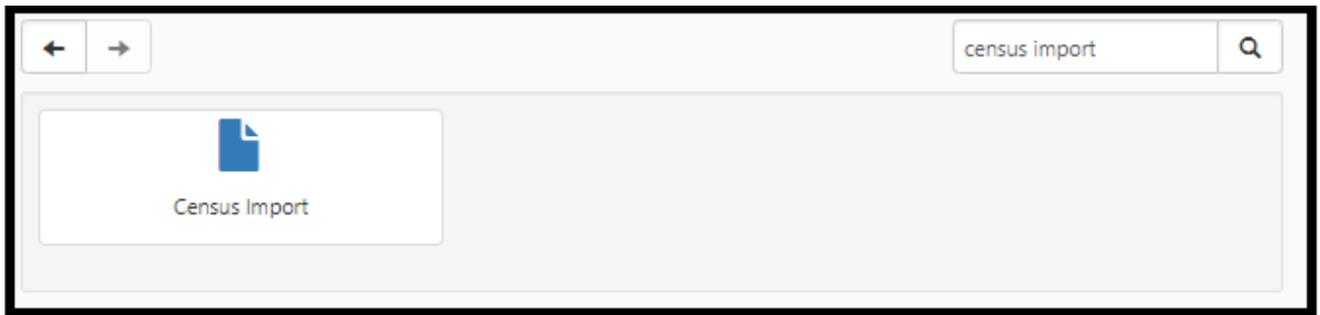
| Colors | Indicates | Action |
|-------------------------------------|---|--|
| Red text with a yellow background | The newly uploaded file has the same states and codes as in the original file, but with different data. | Merge makes sense, assuming you want to overwrite the existing data. |
| Red text with a red background | The uploaded file is missing required data. | Edit the file and re-upload. |
| Standard text, no shaded background | The data is mergeable because it does not match existing data. | Merge |

Employee Census Upload

Upload of Employee Census Data

Use the following procedure to upload employee census data.

1. Open the Workspaces module and open a workspace.
2. In the Dataform Search field, enter Census Import and press Enter.



3. Select the Census Import dataform.
4. Click the **Add** button.
The **Census Import: Add** page displays.

5. Select  (**Attach File**) in the **Employee Census File** field.
Note: See the Employee Census Update Template file in [Attachments](#).
6. Complete the information in the **Upload Field** window:
 - Select **Choose File** and open a CSV file that contains the employee data.
 - Enter text in the **Description** field to describe the employee census file
 - (Optional) Select a value in the **Category** field
 - (Optional) Enter a value in the **Tags** field
 - Click **Save**.

The screenshot shows a web form titled "Upload File". It contains the following fields and controls:

- File:** A "Choose File" button followed by a text box containing "Census -8.csv".
- Description:** A text box containing "Census Data".
- Category:** A dropdown menu.
- Tags:** An empty text box.
- Buttons:** "Save" (blue) and "Cancel" (white) buttons at the bottom right.

- (Optional) When updating the employee census, it may be necessary to delete previously imported employee data and replace it with a current list of employee data. Select the **Delete Existing Employees?** check box to delete existing employee data. **Important:** If this option is checked, the system will delete all employees associated with the workspace when you save the census record. Deleted employees cannot be recovered. This action also deletes any related forms to the employee, attachments, tasks, and time tracking records.
- Click **Save**.

Creating / changing underwriting approval workflow

Underwriting approvals are an essential part of the Client approval process and sometimes need to proceed in a cascading, hierarchical manner. To ensure the appropriate workflow, you can configure approval dependency. As a starter, it is helpful to sketch the approval workflow before beginning. Additionally, you can configure Workflow Channels to trigger during the approval process. For more information on how to configure these, log an Extranet case.

To create or change underwriting approval workflow:

1. Go to the **Admin Workspace**.
2. Select **Underwriting > Approval Dependency**.
The Approval Dependency dashboard opens.
3. Find and select the record you want to **Edit** or click **Add** to add new records.
The Approval Dependency form opens.
4. Edit the approval dependency record:

| | |
|---------------------|--|
| Triggering Approval | When this approval is completed, it triggers a notification for the next approval. Select an item in the list or click Add new item . |
| Next Approval | When the triggering approval is completed, it triggers a notification for this approval. Select an item in the list or click Add new item . |

5. Click **Save**.
6. After you save your changes, to open the parent form for Triggering Approval and Next Approval, click [🔗 \(Open\)](#).

Pricing discount thresholds

This topic describes base functionality and setup of Pricing Discount Thresholds.

The **Max Work Comp Discount** field in the State Master defines the maximum work comp discount allowed for the state. Because the competitive environment is highly dependent on the state, it makes sense to store at the state level. MaxWorkCompDiscount (% data type).

The **Discount Threshold** table defines the max discount thresholds for members in a role. Work comp discount is one of these definitions.

- Role (role selector data type)
- Work Comp Discount threshold % of Max (% data type): Defines the percentage of the max work comp discount that is allowed for members of this role. Default this field to 100% on record create if the field is left blank.
- Minimum Admin Per Head (money data type)
- Minimum Admin Per Account (money data type)
- Max SUTA discount (% data type)

This table is managed in the admin workspace. Validation ensures that only one Discount Threshold can be setup per role.

A new field (submitted by user) has been added to the pricing batch form. This field determines the user rights that allow or disallow the desired level of discounting. PricingBatch.SubmittedByUser (user data type: read only)

Business logic has been added to the pricing batch submission to validate that the user submitting the batch is not discounting the work comp on any of the associated states more than their allowed maximum. If the user has set any of the PricingCode.WorkCompDiscount at a level that is more than they are allowed, a hard error will be raised when the batch is submitted. The error handles both initial quoting and repricing. The error states "Work comp discount exceeds max allowed for code 8810FL (max%), 8742FL (max%), etc".

- The max discount % threshold is the highest discount level for any of the roles in which the user is a member. The max discounts are all stored at the state level. The user role will have the ability to use a portion of the max discount. For example, if the max Work Comp Discount for Florida is 30%, and a user is a member of a role that has authority to discount at 50% of the max discount, they can discount at a 15% level. If no record exists for any given state that is being submitted, for any role in which the user is a member, the user is not allowed to discount codes in that state at all.
- The validation is based on the user that is submitting the deal, not the salesperson and can be skipped using the Override Validations option, a secured field on the pricing batch dataform.
- The validation business rule also sets the PricingBatch.SubmittedByUser.

The **business rule** that validates the minimum admin per head and per account that is currently stored on the Default Information form instead now validates at the user (role) level if there are any Discount Threshold records setup.

- On submission of a pricing batch, the minimum Per Head and Per Account admin that the user is able to set are determined based on their roles. If no Threshold records are setup, then defaults are used from the Default Information Form.
- Total Admin fee is calculated using the standard function (same as on pricing console). This Total Admin is compared to the Minimum Admin Per Account. Validation of the minimum admin per head is done by dividing the total admin by the total number of EEs (part time and full time) on any active pricing code associated with the Pricing Batch that is being submitted.

PEO underwriting approval process

This topic describes the Underwriting Approval process for RFP and Renewal Batches. It is intended for Business Analysts to aid in understanding the process and configuration of the system. It identifies the technical features of the Underwriting Approval process.

Underwriting approval process overview

The Underwriting Approval Process concept is:

- To create Approval records based on specific Pricing Batch criteria (which it has always done).
- Re-use existing Approval records whenever possible to preserve audit data (which it has done although not always appropriately).
- Resolve shortcomings in the existing process when changing Contract Status after Approvals have been generated (which left some Approvals in place although they were not applicable to the business).
- Add Task Triggering to Dependent Approval Escalation.

The process is designed so that certain key Milestones generate Clone Tasks or perform dataform pipeline Saves so that Task Triggering can be initiated. Other minor Milestones are performed directly in the database which will NOT generate Task Triggering.

In this document, the following conventions are used to identify which type of action is performed for those Milestones:

- **[Db]** indicates a database action that does not generate Task Triggering
- **[CloneTask]** indicates a custom Clone Task action is broadcast
- **[Pipeline]** indicates a record is either added or modified through Business Logic causing Task Triggering to fire

The following Processes are evaluated:

- Creating Underwriting Definitions
- Creating Underwriting Approval Dependencies
- Accept the RFP Batch the first time
- Approve or Decline Approval Records
- Reprocess the Batch
- Accept the RFP Batch on subsequent attempts
- Submit the Renewal Batch
- Approve the Renewal Batch Approval Records
- Decline the Renewal Batch
- Changing Contract Types
- Additional Client Master RPF Actions that affect Approvals (Decline, ReActivate)
- Additional Renewal Batch Actions (Kill, Clone)
- Comparison Batches
- Approval State Diagrams

What happens in the system when an RFP is "killed"?

When a "Kill" workflow process is initiated on an RFP from the Pricing Console or Client Master record , the following occurs:

- The **Locked** checkbox located in the Sales/Broker Information section of the Client Master record is unchecked and the **Locked Expiration Date** is also cleared.
- The Client Master record and all associated underwriting approval records are set to a status of "Dead".
- All associated underwriting approval records are marked Inactive (i.e., the **Active** checkbox is cleared) and the **Audit** field of each underwriting approval record is updated with the status change details.

PEO Administered Benefits on Pricing Batch

In ClientSpace PEO, the **PEO Administered Benefits** field indicates the PEO is handling the benefits administration for their client. But what does this mean from a pricing perspective, and what is the effect on the rest of the system?

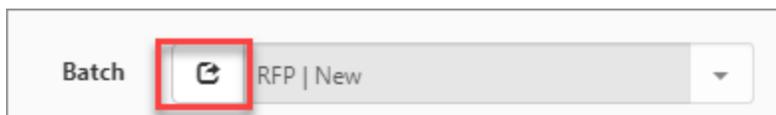
So what does it do?

On the Pricing Batch, if PEO Administered Benefits field (luPEOAdministeredBenefits) is set to **Yes**, then the SetDefaults() rule pulls the surcharge percent from the PEO Administered Benefits Surcharge (PEOAdministeredBenefitsSurcharge) field on the PEO Configuration form. This is then used to set the Pricing Batch Surcharge Percent (SurchargePercent) and Surcharge Amount (SurchargeAmount) fields. If set to **No**, the PEO Administered Benefits Surcharge is ignored.

The luPEOAdministeredBenefits is on the Pricing Batch. If you set this to Yes, then the PEO Administered Benefits Surcharge on the PEO Configuration form is applicable.

How to find:

1. Go to **Pricing** (from the modules bar).
2. Select and open a workspace.
The Pricing Console opens.
3. From **Batch**, click  (**Jump**).



The Pricing Batch form opens.

4. In the **Hidden Fields** fieldset, note the setting for **PEO Administered Benefits**.
- **Yes:** The SetDefaults() rule pulls the surcharge percent from the PEO Administered Benefits Surcharge (PEOAdministeredBenefitsSurcharge) field on the PEO Configuration form.
 - **No:** Ignore the value in the PEO Administered Benefits Surcharge field on the PEO Configuration form.

Pricing Batch : RFP | New Save

| | | | |
|--------------------------|------------|-----------------------------|------------|
| Admin Profit | \$1,665.00 | Comp Profit | \$287.05 |
| Minimum Admin Supplement | \$535.00 | | |
| SUTA Profit | \$442.00 | FICA Profit | \$0.00 |
| TDI Profit | \$0.00 | EPLI Profit | \$67.00 |
| Surcharges | \$500.00 | | |
| Internal Commission | \$0.00 | External Commission | \$0.00 |
| Total Gross Profit | \$2,996.05 | Total Profit Net Commission | \$2,996.05 |

Hidden Fields

| | | | |
|---|----------|--|---------|
| * PEO Administered Benefits | No | HR | |
| PEO Administered Benefits Surcharge (%) | 0.0000 % | PEO Administered Benefits Surcharge (\$) | \$0.00 |
| Wire Reimbursement Cost | \$10.00 | | |
| Default Admin Fee | 0 | Payroll Delivery Cost | \$10.00 |
| Payroll Processing Cost | \$10.00 | Payroll Locations | |

Where is the value set for benefits surcharge?

On the Pricing Batch, if you have PEO Administered Benefits set to Yes, then you may want to view the actual surcharge value.

1. Go to **System Admin** > **Administrative Data** > **PEO Configuration**.
The PEO Configuration form opens.
2. Locate the **PEO Administered Benefits Surcharge** field.

PEO Configuration Save

Pricing Defaults

| | | | |
|--|----------------------------|---|--------------|
| FUTA Cutoffs | Yes | FICA Cutoffs | Yes |
| FUTA Rate | 0.6000 | FICA Rate | 7.6500 |
| FUTA Threshold | \$7,000.00 | FICA Threshold | \$110,100.00 |
| Minimum Premium | \$500.00 | New Hire Setup Fee | \$50.00 |
| Default EPLI (by employee) | 0.0500 | * PEO Administered Benefits Surcharge | 0.5000 |
| Max EPLI PEPM | | EPLI Cost | \$2.00 |
| Payroll Processing Cost | \$10.00 | Default EAP | 0.9000 |
| Wire Delivery Cost | \$10.00 | Payroll Delivery Cost | \$10.00 |
| <input checked="" type="checkbox"/> Show Client Setup Fee On Pricing Console | | Per Claim Deductible | \$250.00 |
| * Default Sales Entity Admin Adjustment | 1.0000 | <input checked="" type="checkbox"/> Include Minimum Admin Supplement in Pricing | |
| Pricing State WC Mod Method | Use Premium Discount Table | Maximum Benefits Discount | 15.0000 % |
| <input type="checkbox"/> Allow Termination from Payroll System | | <input checked="" type="checkbox"/> Show Commission On Pricing Console | |
| | | <input type="checkbox"/> Use Custom Pricing Console | |

Both **Surcharge Percent** and **Surcharge Amount** are used in other things, such as Pricing Views and Client Master validation. These include the following:

- peo_vwPricingInfo_All - Reporting View
- peo_vwPricingInfo - Reporting View
- peo_pricingbatch_u_base_pricing_info - Sets the Batch Benefits Surcharge Amount, among other things, based on calculation.
- peo_clientmaster_s_adminpercentageviolation

For more information about Pricing and how surcharges work, log an Extranet case.

Underwriting definitions and their relation to underwriting approval records

Underwriting Definitions reside in the Admin workspace. They are used as templates to generate Underwriting Approval Records for a client workspace. One Approval record is generated for each Underwriting Definition that matches the following criteria:

- UD (Underwriting Definition) unique Department

- UD Approval Type = RFP or Renewal
- UD Contract Type = CM Contract Type OR is empty
- UD IsActive = True

Underwriting Definition configurations are managed by unique Department/Approval Type/Contract Type:

- For a given Department, a Definition can be created with EITHER a unique Contract Type OR no Contract Type
- A Definition with no Contract Type specified will cause an Approval record to be created for ANY CM/PB Contract Type
- You are not allowed to have an active Department/Approval Type/Contract Type record and an active Department/Approval Type/No Contract Type as that is considered redundant and would result in duplicate Department Approvals

Each Time the Batch is 'Accepted' (RFP) or 'Submitted' (Renewal Batch), any existing Approvals in the workspace are inactivated. New Definitions are retrieved based on the current state of the CM and Batch. Since the Contract Type could change during a Reprocess (RFP) or at any stage in the Renewal process, it is critical that new Definitions are evaluated with each workflow pass. This prevents Approvals that no longer apply to a client from being orphaned and left in the critical path. Consider the following RFP scenario:

- A new client is created with Contract Type = PEO
- Two Underwriting Definitions exist for Contract Type = PEO:
 - Risk
 - Carrier
- When the Batch is Accepted, two active Underwriting Approvals are generated:
 - Risk (Pending)
 - Carrier (Pending)
- It is then decided to convert this client to PEO-Low Cost
- The Batch must be Reprocessed as the Contract Type is currently locked
- The two existing Approval records are set to Status = Reprocess, but they are still Active in the workspace
- The Contract Type is changed to PEO-Low Cost
- One Underwriting Definition exists for Contract Type = PEO-Low Cost
 - HR
- When the Batch is Accepted, we must inactive the invalid Approvals 'Risk' and 'Carrier' and generate the valid Approval 'HR'. If this did not take place, three Approvals would be in the system that would have to be processed, even though two of them no longer apply to the business

- The inactivated Approvals are not removed from the system; they are simply removed from the current workflow process. Notes/Comments on those Approvals are still available.
- If this PEO-Low Cost client is ever Reprocessed and the Contract Type is set back to PEO, the existing inactive Approvals 'Risk' and 'Carrier' will be recycled (re-activated and re-used), and the non-applicable Approval 'HR' will be inactivated for possible future recycling.

Approval dependencies

Approval Dependencies define the hierarchy of Approval records using a system of parent-child dependencies. If an Approval record is dependent on another Approval record (considered the parent record), the dependent Approval record cannot be accessed until the parent is approved. As the parent is approved, escalation of dependent Approvals takes place (now generating Task Triggering), making them accessible to the user for Approving/Declining.

The Approval process: Accepting the RFP Batch

The Accept link (or the link configured to execute the CM.Accept business rule) is selected [CM Pipeline].

CM.Accept rule is executed.

- The active 'Submitted' RFP Batch is located
- The 'Create Approvals' process is executed
 - All existing Approvals {in the workspace} are inactivated (IsActive = False) [Db]
 - The Contract Type found on the Client Master is retrieved (if missing, the Batch Contract Type is used)
 - Client Approval Dependencies are inserted:
 - Any existing Approval Dependency records in this workspace are deleted [Db]
 - New Approval Dependency records are inserted in this workspace [Db] based on the following criteria:
 - The associated Underwriting Definition must match the Batch Type (e.g., RFP)
 - The associated Underwriting Definition must match the Contract Type OR have an empty Contract Type
 - Must be active
 - Construct a list of Underwriting Definitions based on the following criteria:
 - Unique Departments
 - Approval Type matches the Batch type (RFP/Renewal)
 - Contract Type matches the CM/PB Contract Type OR is empty
 - Definition is active

- For each Underwriting Definition in the list:
- Determine if an Approval can be created from this Definition:
- If the Definition Department is NOT "Benefits"
- OR the Health Benefits field on the Client Master = "Yes"
- If an Approval record CANNOT be created from this Definition, move to the next Underwriting Definition
- If an Approval CAN be created:
- Get the Assigned To User (either from the Assigned To or the Assigned To Ref on the Definition)
- If the Assigned To User CANNOT be located, do not create an Approval for this Definition
- If the Assigned To User CAN be located, then
- Attempt to locate an existing Approval record (in this workspace) which matches this Underwriting Definition
- Department
- Contract Type
- Batch ID
- Assigned To User
- IsActive = False
- If a matching Approval record is found
- Set its status to 'Pending' (or 'Waiting' if it is a dependent) [Db]
- Set IsActive = True [Db]
- No Task triggering is generated If a matching Approval record is NOT found
- Create an Underwriting Approval record using the Department, Assigned To, Batch ID, Contract Type, Dependency Count information from the Definition [APP Pipeline]
- Apply Row Security to the record [Db]
- Generate the [CloneTask]"APP_department"
- Next Underwriting Definition

Approval 'Approve'

After 'Accepted', Approvals are in place based on the methods previously described. When an Approval is 'Approved'

If there are Approvals that must be approved prior to approving this Approval, an error is thrown "This record is waiting for the following Approval(s) to be 'Approved'". This should not be the norm as there are user interface controls in place to properly display the parents of dependent Approvals before access to the dependent is granted

If the Department is 'Risk' and the Batch contains Codes Requiring Review, an error is thrown "This Pricing Batch cannot be approved because it has associated Pricing Codes that are marked for review"

If no validation errors are encountered, Approvals are evaluated:

- For Developers: the appropriate Approval Workflow Object is instantiated. This object contains specific methods implemented to act upon Approvals based on the type, such as Pricing, No Pricing)
- If the Approval has changed to 'Approved'
 - The Approved By User, Date and Time approved are set [Pipeline].
 - [CloneTask] 'APPROVED_department' is generated.
 - Dependent Approvals statuses are escalated.
 - A list of dependent Approvals (if any) is retrieved.
- For each dependent Approval:
 - The Assigned To User is located.
 - If an Assigned To User is found, [CloneTask]'APP_department' is generated.
 - The dependent Approval status is progressed to 'Pending' [UnderwritingApproval Pipeline] No rules are executed; this is only a mechanism to allow task triggering to be generated.
- If all Approvals are 'Approved'
- For Developers:
 - An overridable method 'SetApprovedWorkflow' is called. This allows candy solutions to perform some custom actions at this point in the process
 - An overridable method 'OnHasAllApprovals' is called. This allows candy solutions to perform some custom actions at this point in the process
 - In PEO, the 'SetApprovedWorkflow' method
 - Sets CM and Pricing Batch status to 'Approved' [Db]
 - Update Comparison Batches [Db]
 - [CloneTask]'CM_Approved' is generated
 - If all Approvals have NOT been 'Approved' the process remains in its current state awaiting additional Approval activity

Approval 'Decline'

When an Approval is 'Declined'

For Developers: the appropriate Approval Workflow Object is instantiated

If the Approval has changed to 'Declined'

- For Developers:

- An overridable method 'SetDeclinedWorkflow()' is called. This allows candy solutions to perform some custom actions at this point in the process
- In PEO, the 'SetDeclinedWorkflow' method
 - Sets the CM and Pricing Batch status to 'Prospect' and 'New' respectively [Db]
 - Updates the Comparison Batches [Db]
 - Sets the Pricing Batch Date Declined field to the current date [Db]
 - [CloneTask]'DEC_department' is generated
- All other Approvals remain in their current state and status

Continuing the Approval process after an Approval has been 'Declined'

The Client Master Status will be 'Prospect' and the Pricing Batch Status will be 'New'. All Approvals will be in the state they appeared when the Approval was declined (e.g. Approved, Declined, Pending, or Waiting) and IsActive = True. The Batch could then be 'Submitted'. At this point, the 'Accept' workflow will take effect.

Since new Underwriting Definitions are retrieved for each pass through the Approvals process, any changes to the client information are re-evaluated and Approvals are fully synchronized to the business. Contract Type, Comparison Batch conversion to RFP Batch, Approval Assigned To, are examples of changes that will have an impact on the types of Approvals that will be used.

Submitting a Renewal Batch

After the RFP Batch has become 'Activated', the RFP batch is 'retired' (i.e. no further changes can be made) and Renewal Batches are in effect. The Approval Process is similar to the RFP process, but with minor changes. Note: for all actions, the Approval or Underwriting Definition Approval Type must be 'Renewal'

- 'Submit' the Renewal batch
 - The Renewal batch status is progressed to 'Underwriting'
 - Any existing Approvals are set to 'Reprocess' [Db]
 - All existing Approvals are set to IsActive = False [Db]
 - Approval Dependencies are created [Db]
 - Underwriting Definitions are located
 - Underwriting Approval Records that exist and match an Underwriting Definition are set IsActive = True, Status = 'Pending' (or 'Waiting' if it is a dependent) [Db]
 - Underwriting Approval Records that do not match an Underwriting Definition are created [Pipeline] and [Clone Task]
- 'Approve' an Approval

- Similar to the RFP Approval 'Approve' process, but the Batch status is progressed to 'Approved' when all Approvals are 'Approved'.
- 'Decline' the Renewal batch
 - Individual Approval records cannot be Declined, the entire Batch must be Declined
 - When Declined, all active existing Approval records are set to Status = Reprocess [Db]

Changing Contract Types

Contract Type changes affect the types of Approvals that must be in place for this client.

- RFP Batch, Client Master Contract Type Change
 - The Contract Type cannot be changed from the Client Master once the Contract Status = Submitted. The Batch will have to be Reprocessed to facilitate a Contract Type change
 - After 'Reprocess', all Approvals are set to Status = 'Reprocess' [Db]. Those Approvals that applied to the current Contract Type are left IsActive = True
 - While in 'Prospect' status, after the Contract Type change is saved from the Client Master, the Batch is saved [Pipeline] causing Pricing Batch business logic to execute.
 - As described in the 'Accept' process, Underwriting Definitions are re-evaluated based on the Contract Type. New Approvals are generated as needed and existing Approvals which match the Contract Type (or have an empty Contract Type) are recycled. The status of all Approvals is reset to 'Pending' or 'Waiting' (based on dependencies)
- RFP Batch, Pricing Batch Contract Type Change
 - The Contract Type on the Pricing Batch is Read-Only for RFP batch types. This will prevent Pricing Batch Contract Type changes from occurring from the Pricing Batch. The deal will have to be 'Reprocessed' before the Contract Type can be changed (from the Client Master)
- Renewal Batch
 - The Contract Type cannot be changed once the Batch Status = Activated
 - While the Batch Status = Underwriting, valid Approvals are in place. If the Contract Type is changed at this point:
 - Those Approvals are inactivated and set Status = Reprocess [Db]
 - New Underwriting Definitions are retrieved based on the Contract Type and new Approval records are created and existing Approval records which match the Contract Type (or have an empty Contract Type) are recycled.

Client Master RFP actions

The following RFP Actions affect Approvals. It should be noted that once the RFP batch is 'Accepted', Approvals are recycled or created based on the criteria outlined above.

- Decline

- Sets Approval Status = Reprocess [Db]
- Approval remains IsActive = True [Db]
- ReActivate
 - Approval Status is not changed
 - Sets Approval IsActive = False [Db]

Renewal batch actions

The following Renewal Batch Actions are included to give the reader an understanding of the process as it applies to Approvals

- Kill
 - No effect on Approvals
 - Approvals that were in place prior to 'Kill' are unchanged
 - When the Renewal Batch is Submitted, Approvals will be created or recycled as necessary
- Clone
 - No effect on Approvals
 - Approvals that were in place prior to 'Clone' are unchanged and left attached to the Batch that was cloned
 - When the Cloned Renewal Batch is Submitted, Approvals will be inactivated, created or recycled as necessary.

Comparison batches

Approvals that are attached to the RFP Batch at the time of 'Accept' are the only Approvals that will need to be processed (Approved or Declined). As the RFP Batch is 'Reprocessed', it is possible that a Comparison Batch could be converted to an RFP Batch. A workspace could end up with many sets of Approval records attached to the various Batches that were cycled through the Comparison/RFP/Comparison conversion. The following process is implemented during this conversion:

- The current RFP Batch is changed to a Comparison Batch type [Db]
- The current RFP Batch Approvals are set IsActive = False, Status = "" [Db]
- Any existing Approvals which are attached to the Comparison Batch that will now become the RFP Batch are set IsActive = True, Status = "" [Db]
- The Comparison Batch type is changed to RFP [Db]

As in other processes, the new RFP Batch can be 'Submitted', then 'Accepted', and the 'Accepted' process described above will be implemented.

Approval state diagrams

Sample Approval state progressions are shown in the following diagrams.

RFP: ALL APPROVALS 'APPROVED'

| Action | CM | BATCH | Risk | Benefits | Carrier | Executive |
|---------------|--------------|--------------|----------------|----------------|----------------|----------------|
| | Prospect | New | Pending | Pending | Pending | Waiting |
| Submit | Submitted | Submitted | Pending | Pending | Pending | Waiting |
| Accept | Underwriting | Underwriting | Pending | Pending | Pending | Waiting |
| | Underwriting | Underwriting | Approve | Pending | Pending | Waiting |
| | Underwriting | Underwriting | Approve | Approve | Pending | Waiting |
| | Underwriting | Underwriting | Approve | Approve | Approve | Pending |
| | Approved | Approved | Approve | Approve | Approve | Approve |



RFP: BENEFITS APPROVAL 'DECLINED'

| Action | CM | BATCH | Risk | Benefits | Carrier | Executive |
|---------------|--------------|--------------|----------------|----------------|---------|-----------|
| | Prospect | New | Pending | Pending | Pending | Waiting |
| Submit | Submitted | Submitted | Pending | Pending | Pending | Waiting |
| Accept | Underwriting | Underwriting | Pending | Pending | Pending | Waiting |
| | Underwriting | Underwriting | Approve | Pending | Pending | Waiting |
| | Underwriting | Underwriting | Approve | Decline | Pending | Waiting |
| | Prospect | New | Approve | Decline | Pending | Waiting |
| Submit | Submitted | Submitted | Approve | Decline | Pending | Waiting |
| Accept | Underwriting | Underwriting | Pending | Pending | Pending | Waiting |

CM & BATCH
reset to
Prospect/New
when BENEFITS
Declined

RISK
Approved,
remains at
Approved
until re-
accepted,
then set to
Pending

BENEFITS
Declined,
remains at
Declined
until re-
accepted,
then set to
Pending

CARRIER
no status
change

EXECUTIVE
no status
change

RFP: BATCH 'REPROCESSED'

| Action | CM | BATCH | Risk | Benefits | Carrier | Executive |
|------------------|--------------|--------------|----------------|-----------|-----------|-----------|
| | Prospect | New | Pending | Pending | Pending | Waiting |
| Submit | Submitted | Submitted | Pending | Pending | Pending | Waiting |
| Accept | Underwriting | Underwriting | Pending | Pending | Pending | Waiting |
| | Underwriting | Underwriting | Approve | Pending | Pending | Waiting |
| Reprocess | Prospect | New | Reprocess | Reprocess | Reprocess | Reprocess |
| | Prospect | New | Reprocess | Reprocess | Reprocess | Reprocess |
| Submit | Submitted | Submitted | Reprocess | Reprocess | Reprocess | Reprocess |
| Accept | Underwriting | Underwriting | Pending | Pending | Pending | Waiting |

CM & BATCH
reset to Prospect/New when Reprocessed

RISK
set to Reprocess remains until Accepted

BENEFITS
set to Reprocess remains until Accepted

CARRIER
set to Reprocess remains until Accepted

EXECUTIVE
set to Reprocess remains until Accepted

RFP: BATCH 'REPROCESSED' AND CONTRACT TYPE CHANGED

| | Risk [None] | Benefits [PEO] | Carrier [ASO] |
|------------------------|--------------------|----------------------|----------------------|
| Submit [PEO] | Not created | Not created | Not created |
| Accept [PEO] | Pending (Active) | Pending (Active) | Not created |
| Reprocess [PEO] | Reprocess (Active) | Reprocess (Active) | Not created |
| CT Change [ASO] | Reprocess (Active) | Reprocess (Active) | Not created |
| Submit [ASO] | Reprocess (Active) | Reprocess (Active) | Not created |
| Accept [ASO] | Pending (Active) | Reprocess (Inactive) | Pending (Active) |
| Reprocess [ASO] | Reprocess (Active) | Reprocess (Inactive) | Reprocess (Active) |
| CT Change [PEO] | Reprocess (Active) | Reprocess (Inactive) | Reprocess (Active) |
| Submit [PEO] | Reprocess (Active) | Reprocess (Inactive) | Reprocess (Active) |
| Accept [PEO] | Pending (Active) | Pending (Active) | Reprocess (Inactive) |

RFP through RENEWAL

| Action | Client Master | Batch | Risk-RPF [No ContractType] | Benefits-RPF [PEO] | Benefits-Renewal [No ContractType] | Sales-Renewal [PEO] | Risk-Renewal [ASO] |
|----------------------------|---------------|------------------|----------------------------|---------------------|------------------------------------|----------------------|--------------------|
| Submit [PEO] | Submitted | RFP-Submitted | Not created | Not created | Not created | Not created | Not created |
| Accept | UW | RFP-UW. | Pending (Active) | Pending (Active) | Not created | Not created | Not created |
| Approve Risk | UW | RFP-UW | Approved (Active) | Pending (Active) | Not created | Not created | Not created |
| Approve Benefits | Approved | RFP-Approved | Approved (Active) | Approved (Active) | Not created | Not created | Not created |
| Contract Signed | Conversion | RFP-Approved | Approved (Active) | Approved (Active) | Not created | Not created | Not created |
| Activate | Client | RFP-Activated | Approved (Active) | Approved (Active) | Not created | Not created | Not created |
| Clone RFP | | Renewal-New | Approved (Active) | Approved (Active) | Not created | Not created | Not created |
| Submit Renewal | | Renewal-UW | Approved (Inactive) | Approved (Inactive) | Pending (Active) | Pending (Active) | Not created |
| Decline Renewal | | Renewal-New | Approved (Inactive) | Approved (Inactive) | Reprocess (Active) | Reprocess (Active) | Not created |
| Submit Renewal | | Renewal-UW | Approved (Inactive) | Approved (Inactive) | Pending (Active) | Pending (Active) | Not created |
| Approve Benefits | | Renewal-UW | Approved (Inactive) | Approved (Inactive) | Approved (Active) | Pending (Active) | Not created |
| Approve Sales | | Renewal-Approved | Approved (Inactive) | Approved (Inactive) | Approved (Active) | Approved (Active) | Not created |
| Decline Renewal | | Renewal-New | Approved (Inactive) | Approved (Inactive) | Reprocess (Active) | Reprocess (Active) | Not created |
| Change Contract Type [ASO] | | Renewal-New | Approved (Inactive) | Approved (Inactive) | Pending (Active) | Reprocess (Inactive) | Pending (Active) |
| | | | | | | | |

Disabling Override Billing Adjustment

This option is on the Pricing State and it is turned on by default. For the default WC Discount to work, you need to configure this field to be cleared.

To disable Override Billing Adjustment:

1. Go to **System Admin**  > **Advanced** > **Dataform Admin**.
The Dataform Admin dashboard opens.
2. Select **Workers Comp Policy**.
The Dataform Properties: Workers Comp Policy form opens.
3. In the **Action Center**, select **Fields**.
The list of fields displays.
4. Move **Pass Through by Default** out of the hidden fieldset and into the **Policy Details**.
5. Configure Dataform Rows so it is at the end of the fieldset.
6. Go to **Admin Workspace** > **Risk** > **Workers Comp Policy**.
7. Select a policy from the list.
8. For **Pass Through by Default**, select **Yes**.

Any pricing states generated using this policy now defaults the **Override Billing Adjustment** option as cleared and the system then uses the Default WC Rate.

Setting up a dummy Payroll code

Sometimes you need a dummy payroll code, for example, if you have non-Worker's Comp wages for the owner.

To set up this dummy code:

1. Add a "0000" WC Code.
2. Create a Carrier Org called Client WC Policy (For Payroll Only).
3. Create WC Policy.
4. Add Policy Comp Code for each State they will use it in.

Ensuring Add State & Code Availability from the Pricing Console

The **Add State & Code** button on the Pricing Console is secured for selected users. When the status of the Pricing Batch is set to Active (activated), you want to ensure that only certain users can add states and codes.

Cameron's Coffee House 2 Pricing Console

Company Information Edit

* Legal Name: Cameron's Coffee House 2 FEIN:

Contract Type: PEO 2 - Use ACME Domestic LE/Use Client WC N Pay Frequency:

Description of Operations:

Quick Create

Client Modifier = 1
Pre-load
Add State & Code

| State | Code | Payroll | EEs FT | EEs PT | Pay Frequency | Manual Rate | SUTA |
|------------------|------|---------|--------|--------|---------------|-------------|------|
| No Records Found | | | | | | | |

If the button for **Quick Add** does not appear for a user, check the following:

- Is the user in a role with the **Quick Edit** entity and **Add** rights?
- Is the Pricing Batch in a status of **New**?
- On the Client Master ensure that **HRO/PEO Quote** (Use Pricing) is set to **Yes**.
- On the Client Master ensure that **Build Pricing From Employee Census** is set to **No**.

What happens when reactivate is clicked?

The following dates are cleared during reactivate.

| Location | Dates |
|---------------|--|
| Client Master | <ul style="list-style-type: none"> • RFPSubmitDate • ApprovateDate • ConversionDate • StartDate |
| Batch | <ul style="list-style-type: none"> • DateSubmitted • EffectiveDate • ExpirationDate • DateApproved • DateDeclined • fkApprovedByUserID |
| State | <ul style="list-style-type: none"> • DateActivated • DateApproved • DateDeclined • DateSubmitted • fkApprovedByUserID |
| Codes | <ul style="list-style-type: none"> • DateActivated • DateApproved • DateSubmitted • DateDeclined • fkApprovedByUserID |
| Other Events | <ul style="list-style-type: none"> • All Approval records are inactivated. • Workspace Group is set back to Prospect. • All tasks with the CM_ReActivate custom condition are cloned. |

What makes a dataform required?

The configurability of ClientSpace allows you to ensure specific information is gathered as part of the Pricing process. One way to do so is by requiring the presence of a dataform before submissions can be made. There are several ways this can be configured, all through business rules.

This topic provides an overview of common required Table rules and how they can be configured to ensure the appropriate information is gathered throughout the sales and pricing process.

So what makes a dataform required anyway?

Several business rules, both soft and hard error varieties control this functionality. We will look at the hard errors, which stop the workflow process. Through these configurable rules and others like them, as well as required field engine rules on the dataform, ClientSpace makes it possible for you to design and create pricing workflows to ensure that your sales process is consistent and all required documentation is complete.

HE_RequiredTableEngine

Requires a specific dataform be created for the workspace before allowing the Action to continue. In the previous example, to submit the deal a Collateral form must be created for the workspace.

Rule Details
Save

General

*** Dataform**

*** Rule Title**

*** Description**

Require Collateral Form

Primary Trigger Field

Secondary Trigger Field

*** Execution Pipeline**

*** Save Action**

*** Method**

*** RuleType**

Primary Trigger Value

Secondary Trigger Value

*** Execution Order**

Method Parameters

TableName

Administrative

ID

Date Created

Date Updated

GUID

Created By

Updated By

Active

HE_RequiredTablePerContractTypeEngine

Requires a specific dataform be created for the workspace before allowing the Action to continue based on Contract type. Specific contract types could require different forms.

Rule Details Save

General

| | | | |
|-------------------------|---|-------------------------|---------------------------------------|
| * Dataform | Client Master | * Method | HE_RequiredTablePerContractTypeEngine |
| * Rule Title | | * RuleType | Hard Error |
| * Description | <div style="border: 1px solid #ccc; height: 40px;"></div> | | |
| Primary Trigger Field | | Primary Trigger Value | |
| Secondary Trigger Field | | Secondary Trigger Value | |
| * Execution Pipeline | Default | * Execution Order | 0 |
| * Save Action | Both | | |

Method Parameters

| | | | |
|-----------|--|---------------|--|
| TableName | | sContractType | |
|-----------|--|---------------|--|

Active

HE_RequiredFieldPerContractType

Requires a specific dataform field be completed / filled for the workspace before allowing the Action to continue based on Contract type. Specific contract types could require different dataform fields.

Rule Details Save

General

| | | | |
|--------------------------------|---|--------------------------------|---------------------------------------|
| * Dataform | Client Master | * Method | HE_RequiredFieldPerContractTypeEngine |
| * Rule Title | | * RuleType | Hard Error |
| * Description | <div style="border: 1px solid #ccc; height: 40px;"></div> | | |
| Primary Trigger Field | | Primary Trigger Value | |
| Secondary Trigger Field | | Secondary Trigger Value | |
| * Execution Pipeline | Default | * Execution Order | 0 |
| * Save Action | Both | | |

Method Parameters

| | | | |
|------------------|--|----------------------|--|
| TableName | | sContractType | |
| FieldName | | | |

Active

HE_RequiredTablePerCodeEngine

If specific Comp Codes are present in the Pricing Batch (rule accepts a comma separated list - no spaces) require a specific dataform to be created for the workspace before allowing the Action to continue.

The screenshot shows the 'Rule Details' configuration window for the rule 'HE_RequiredTablePerCodeEngine'. The window is titled 'Rule Details' and has a 'Save' button in the top right corner. The configuration is organized into several sections:

- General:**
 - * Dataform:** Client Master
 - * Method:** HE_RequiredTablePerCodeEngine
 - * Rule Title:** (empty)
 - * RuleType:** Hard Error
 - * Description:** (empty text area)
 - Primary Trigger Field:** (empty)
 - Primary Trigger Value:** (empty)
 - Secondary Trigger Field:** (empty)
 - Secondary Trigger Value:** (empty)
 - * Execution Pipeline:** Default
 - * Execution Order:** 0
 - * Save Action:** Both
- Method Parameters:**
 - TableName:** (empty)
 - CodeList:** (empty)

At the bottom left, there is a checkbox labeled 'Active' which is checked.

How annualized wages are calculated

This topic summarizes how Annualized wages are calculated.

The short answer to this question is – it's complicated. The long answer depends on whether there is more than a year's worth of Payroll Statistics records in the system.

- If the Client has more than a year's worth of wages in the Payroll Statistics table, the Annualized wages are simply the sum of the Gross Payroll amounts from Payroll Statistics.
- However, if the client has less than a year in Statistics, then annualized gross pay is calculated like this:
 - $\text{AnnualGrossPayroll} = (360.00/\text{DATEDIFF}(d,\text{FirstStatStart},\text{MostRecentStatEnd})) * \text{ISNULL}(\text{PeriodGrossPayroll},0)$

- Roughly translated Annual gross pay = (360.0/ number of days between the first pay period start and most recent period end) * SUM(Gross payroll on statistics)
- **360/difference** gives you what percentage daily of the year for which payroll has been submitted.
- Multiplying this by the sum of the actual wages gives an estimated total of what wages should be at the end of the year.
- The **30/360 method** is a commonly accepted practice used in calculations that divide the year into periods, such as mortgage amortization schedules because it rounds more cleanly.
- It works as well as 365 when estimating possible payroll and leaves less chance for trailing decimals

Client profitability

You can run a Client Profitability report from a link on the Client Master. For details about the report, review the *Client Profitability Guide*.

A stored procedure for the Client Scorecard merge, **peo_merge_client_profitability**, includes scorecard fields and the following additions. To implement this feature, you need a merge template. For assistance, please log a case in the Extranet.

| Payroll tab | Returns the following |
|--|---|
| The merge date range applies to all results and returns the following: | <ul style="list-style-type: none"> • Count of payroll batches in date range (integer) • Count of paychecks (employees paid) in date range • Bill Amount, Cost Amount, Bill Code, and metadata value on Bill Code (Billing Voucher) • Total count of payroll batch dataforms by batch type in date range (integer) R, S, M, Other • TotalWSEPaid by: TotalR, TotalS, TotalM, TotalOther • Total Checks Processed equal to the sum of Employee Count field on all batches in the date range • Average EE Count: Total Employee Count divided by count of batches in the date range |

| Contract Info | Current batch returns |
|--|--|
| Surcharge list data associated with current batch returns: | <ul style="list-style-type: none"> • fkSurchargeTypeID (decoded) • Surcharge • SurchargeDescription |

| Commission list data | Current batch returns |
|---|--|
| Commission list data associated with current batch returns: | <ul style="list-style-type: none"> • fkSalesEntityID (decoded) • luCommissionMethod (decoded) • SalesCreditPct • PercentProfit • PercentPayroll • FlatCommission • PerHeadCommission • SurchargePercent • PercentPremium • PercentAdmin • EffectiveDate • ExpirationDate |

| Client Service | Column |
|-----------------------|---|
| | <ul style="list-style-type: none"> • HourlyCost by Department (Client Visit Type Metadata) |

| Unemployment | Column |
|---------------------|--|
| | <ul style="list-style-type: none"> • Returns the Latest Value as of value. • Returns a sum of all of the active benefit charges. |

Chapter 6

Integrations

ClientSpace provides integration and APIs for the following applications:

- DocuSign
- PlanHub
- Salesforce

DocuSign

DocuSign is one of the most widely used e-signature applications in the world allowing you to sign documents anywhere from any email-enabled device without overnighting, faxing, or waiting.

Read more about the DocuSign integration in the *ClientSpace Setup & Administration Guide*.

PlanHub

PlanHub allows you to create instant, customized 401k cost comparison proposals for your clients and prospects, as well as to enroll your contacts into an automated email campaign to nurture them towards sales-readiness with the value of the 401k at the forefront. For more information about PlanHub, see their [website](#).

With the ClientSpace PlanHub integration, you can request a Slavic 401k PlanHub proposal from within ClientSpace – offering you an integrated solution. From ClientSpace, you can create instant, customized 401k cost comparison proposals for your clients.

The ClientSpace PlanHub integration passes the prospect's FEIN to Slavic401k, and if successful, a PDF version of the PlanHub proposal is received and uploaded to the Slavic PlanHub dataform. When the PlanHub proposal is received, it can trigger established workflows to notify individuals for any additional next steps.

Read more about the PlanHub integration in the *ClientSpace Setup & Administration Guide*.

Salesforce

The Salesforce API Integration is a PEO process that maintains data synchronization between a client's ClientSpace installation and their respective Salesforce system.

During the life cycle of a Deal, either Salesforce or ClientSpace is responsible for the data. Typically, when in the Lead Discovery cycle, Salesforce owns the data. As changes are made in Salesforce, ClientSpace is updated with those changes. When the Deal has reached a certain level, ClientSpace will no longer accept changes from Salesforce but will keep Salesforce up to date with certain data as changes are made in ClientSpace.

Read more about the Salesforce integration in the *ClientSpace Setup & Administration Guide*.

Chapter 7

Sales Videos

Watch the following videos to learn more about ClientSpace Sales Management.

Learning how: Sales Pipeline Reports

View the video about the [Sales Pipeline Reports](#).

Learning how: Sales Forecasting

View the video about the [Sales Forecasting](#).

Learning how: Sales Activity Management



View the video [Sales Activity Management](#).

Learning how: Contact Overview

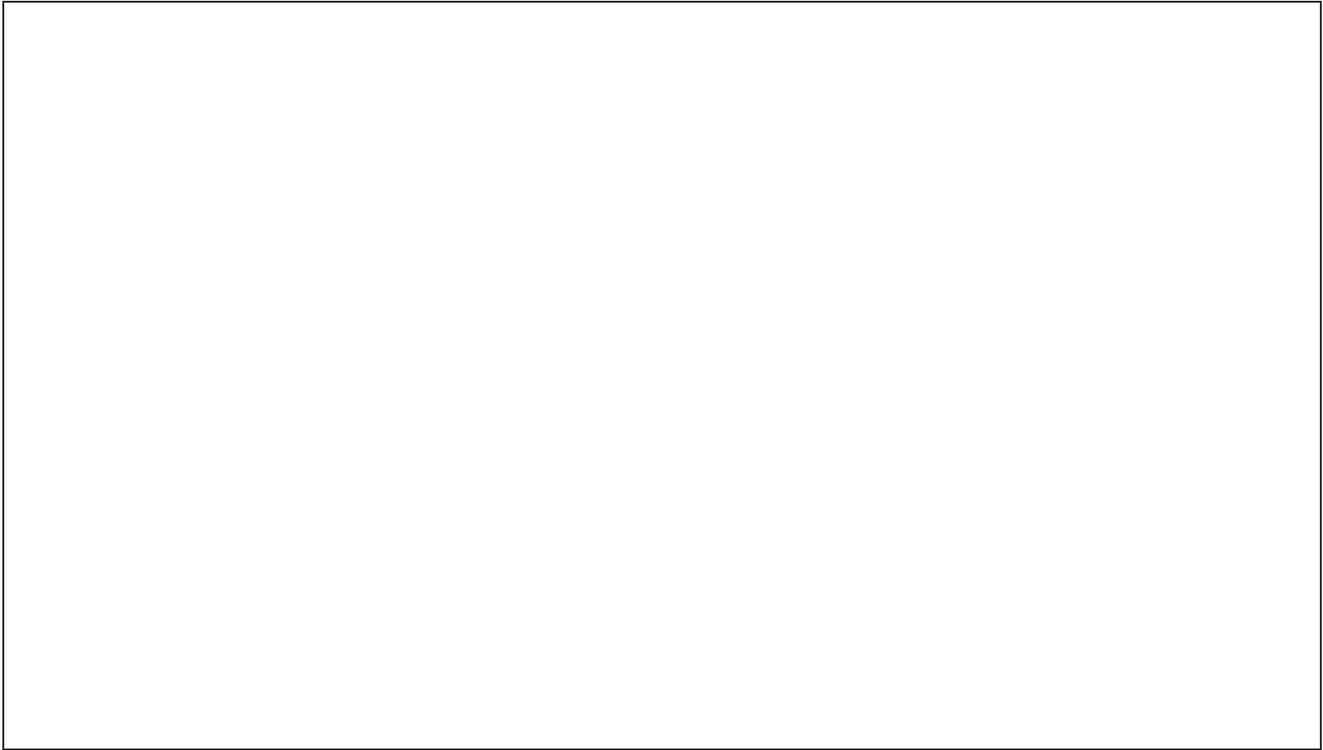


Video

View the video [Contact Overview](#).

Learning how: Creating Contacts from Employees

Watch the video [Creating Contacts from Employees](#).



Learning how: Employee Contacts



Video

View the video about the [Employee Contacts](#).

Learning how: Client Visits

Maintaining the pulse of your clients is important and nothing makes this easier than regular client visits. Visits help to keep you in touch with the client relationship and helps to ward off issues before they can occur. ClientSpace makes the visit easy to schedule and maintain through the client visit form.



Watch the video about [Client Visits](#).

Learning how: Adding a Broker

PEO brokers work with businesses to find the best fit between the business and a PEO. This video shows you how to add a broker.



Video

Watch the video about [Adding a Broker](#).

Learning how: Client Alerts



Video

View the video [Client Alerts](#).