



AVIONTÉ



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August 4-6, 2025
[Hilton Minneapolis](#)

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Beyond Manual Scheduling: How Shift Templates Transform Your Recruiting Process

201 Level Training





About Me:

- April Wood
- Customer Success Training Specialist
- Over 10 years of experience in Training & HR for Staffing & Corporate Settings
- I have hiked to a glacier



The Agenda

1

Manual shift scheduling challenges

2

Shift schedule templates solution

3

Implementation steps

4

Use cases & benefits

5

Quiz Time!

6

Q&A





The Daily Scheduling Challenge

- Lack of visibility into shift specifics across job postings and reports
- Multi-location shift complexity management
- Excessive time spent on manual shift data entry
- Client complaints about unclear shift details on invoices
- Recruiter focus diverted from candidate quality assessment



Pain Points

10+ minutes PER job order



Impact on Business



Time to Fill

Vague schedules trigger extra conversations, unnecessarily delaying placement



Churn

Higher turnover from shift reality/expectation mismatch



Dissatisfaction

Reduced client satisfaction from inconsistent coverage



Wasted Time

Recruiter time diverted from candidate quality and relationships



The Solution

Shift Schedule Templates enable you to create standardized shift information once, use it repeatedly across companies or job orders, eliminate manual data entry errors, and maintain consistent candidate communication.

myDashboard Jobs Talent Timesheet Invoices Companies Documents Back Office Analyze Sub Vendors QuickPlace Automation

Dashboard Tasks

Shift Configuration

Create and edit shift schedules, enabling seamless application to job for accurate invoicing.

Shifts

Search Shift Name or Description

Shift Name	Description	Start Time	End Time	Break Hours	Days	Weekly Total Hours	Active
Halper	Halp me!	05:00 AM	01:00 PM	1.00	Mo, We, Fr	24.00	<input checked="" type="checkbox"/>
New Template	EE	01:00 PM	01:30 PM	0.00	Mo, Fr	1.00	<input checked="" type="checkbox"/>
Third	Third	--	--	--	None	--	<input checked="" type="checkbox"/>
Worktron	9-5	--	--	--	None	--	<input checked="" type="checkbox"/>

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Key Capabilities



System-level vs.
company-level
templates



Complete shift
information storage



Seamless sync
between Bold and
Back Office



Office-specific access
controls

The Game-Changing Impact



System Setup

Before you can start creating templates, you'll need to ensure the Back Office sync is enabled. This is a one-time setup that your system administrator will handle:

Monday, March 10, 2025

Search Type: Set Name Search Search Criteria: []

System | Config Option

Config Option By Property | Config Option By FKName | Config Option Default Value

Select Type: System

Select OptionType: SystemSettings

Select Property:

Property Name	Value	Action
BOscheduleSync129196	True	Edit
AllowEmailingUnpostedInvoices	True	
AllowHyphenatedDirectDepositAccou	False	
DefaultCovidBillingAmount	1	
Test1099TalentFeature	True	
EnableTestC2CTalentFeature	True	
EnableUserSyncFeature	False	
EnhanceGridPerformance	true	
ExperianPartnerAccountCode		
ExperianWebApiUrl		
ExperianWebPortalUrl		
FinanceChargeCalculationSP	dbo.Inv_ProcessOverdueCustomerInv	
GetEmployeesWithUnsubmittedTime	False	
KenexaAssessmentKasAtsId	KASWS	
KenexaAssessmentWebApiUrl		
KenexaAssessmentWebServiceUrl	https://provet.com/KPIATS/WebServic	

User Info:

Type Name	Type Value
UserName	avi-WORKTRON.
Branch	Worktron
Supplier	Staffing
Environment	Production
SupportCode	MN4058

Hot Keys:

Keys	Function
F1	Start Page
F2	Employee
F3	Customer
F4	Temp Order
F5	DH Order
F6	Contact
F7	Advanced Search
F9	Quick Place
F11	Switch Branch

Current Branch Settings:

Company	Branch
Implementation	Eagan
Staffing	Chester
Staffing	Clinton
Staffing	Sauron
Staffing	Springfield
Staffing	Worktron

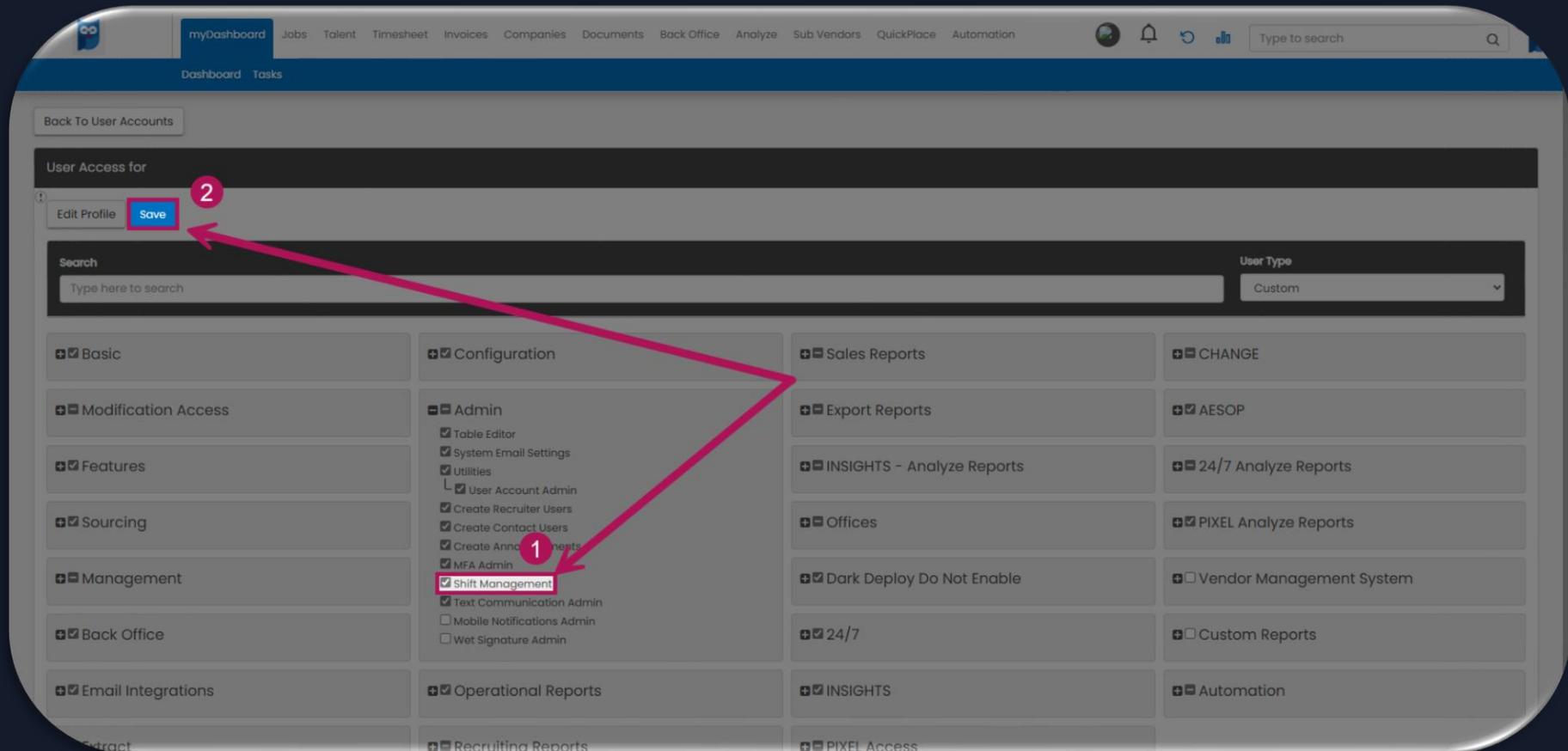
Tab 1 Tab 2

MN4058 Production v:25.2.1.0 avi-WORKTRON 3/10/2025



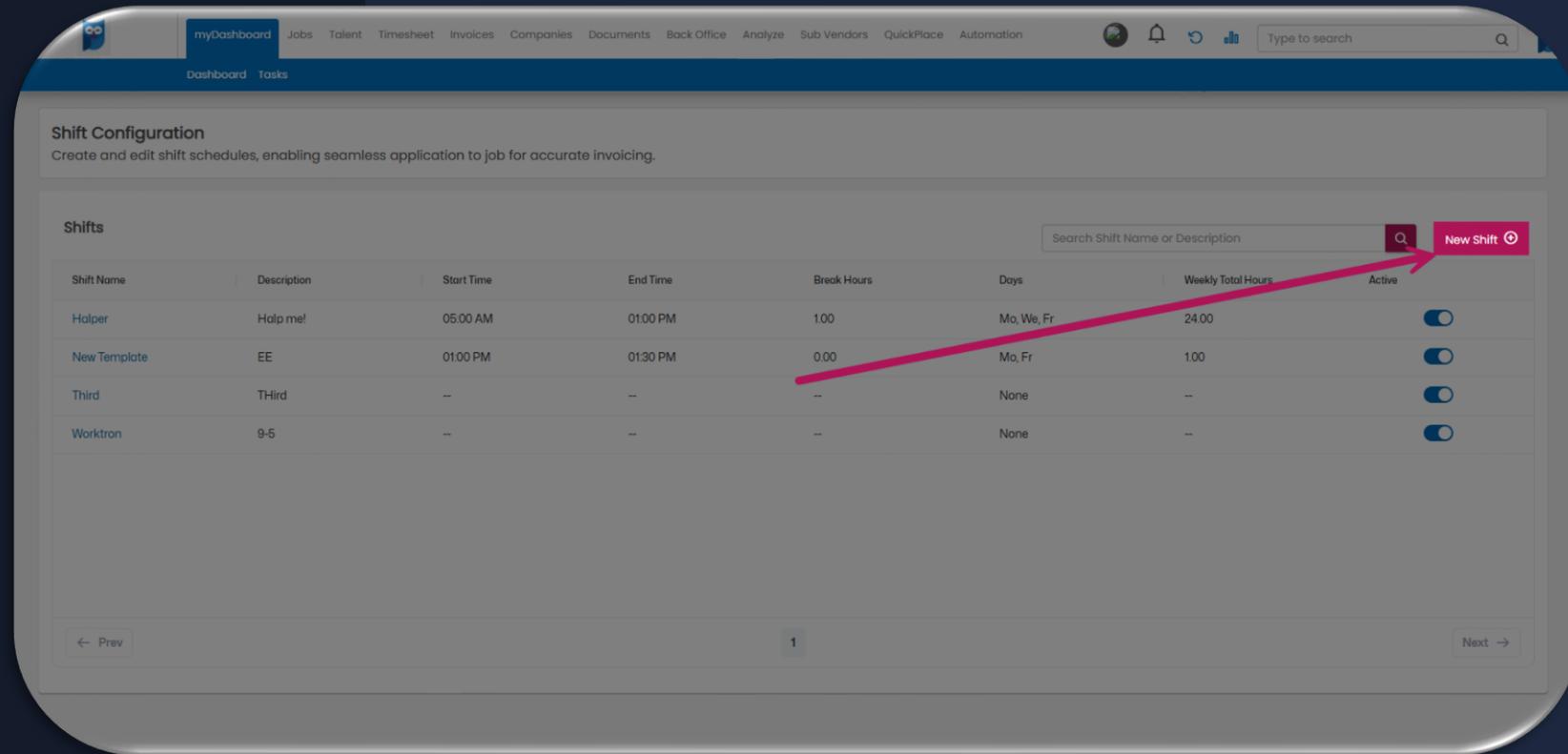
Access

Before you can start creating templates, you'll need to ensure the users who will complete this have appropriate access



System-Level Templates

This allows your most frequently used shifts to be created for all clients and only unique shifts showing up for the client requiring it.



myDashboard Jobs Talent Timesheet Invoices Companies Documents Back Office Analyze Sub Vendors QuickPlace Automation

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Halper	Halp me!	05:00 AM	01:00 PM	1.00	Mo, We, Fr	24.00	<input checked="" type="checkbox"/>
New Template	EE	01:00 PM	01:30 PM	0.00	Mo, Fr	1.00	<input checked="" type="checkbox"/>
Third	THird	--	--	--	None	--	<input checked="" type="checkbox"/>
Worktron	9-5	--	--	--	None	--	<input checked="" type="checkbox"/>

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Company-Level Templates

This approach keeps your **template library clean** and organized, with only relevant shifts showing up for **each client**.

The screenshot shows a software dashboard for a company named 'Enclave'. The dashboard is titled 'myDashboard' and has a navigation menu with items like 'Jobs', 'Talent', 'Timesheet', 'Invoices', 'Companies', 'Documents', 'Back Office', 'Analyze', 'Sub Vendors', 'QuickPlace', and 'Automation'. The main content area is titled 'Requirements' and contains three sections: 'Custom Job Order Templates', 'Custom Filled Job Requirement Groups', and 'Shift Schedules'. The 'Shift Schedules' section is highlighted with a red border and contains a table with the following data:

Shift Name	Description	Office Access	Start Time	End Time	Break Hours	Days	Weekly Total Hours
First	First Shift	Main	09:00 AM	05:00 PM	1.00	Mo, Tu, We, Th, Fr	40.00
Second	Second Shift	Main	05:00 PM	01:00 AM	1.00	Mo, Tu, We, Th, Fr	40.00



Adding Shifts to Jobs

Time saved:
9+ minutes
per job order



Shift Visibility in BOLD

The screenshot shows the BOLD job details page for a 'Secret Service Agent' position. The page is divided into several sections:

- Job Header:** Includes the job title 'Secret Service Agent', status 'CLOSED', 'NOT POSTED', and 'WorkN - Not Synced'. It also shows the company 'Enclave - Main Washington, DC' and location 'Washington, DC 20500'. A 'Filled' status is indicated with icons for a calendar, document, person, and clock.
- Job Details:** Lists 'Req ID: gc62257310', 'Job ID: 44233432', 'Back Office Order ID: [redacted]', 'Job Owners: Gabriel Coleman', 'Job Branch: (Staffing-US) Worktron', 'Sales Rep: None', 'Job Origin: Manual Entry', and 'Pixel Bot: No Bots'. There are 'Add Widget' and 'Create Clone' buttons.
- Client Profile:** A modal window showing contact information for 'Dick Richardson', including address, phone, email, and division.
- Shift Schedule:** A modal window for configuring the shift. It includes a 'Shift' dropdown (set to 'First'), 'Shift Days' (Mo-Fr), 'Start Time' (09:00 AM), 'End Time' (05:00 pm), and 'Break Hours' (1). A summary shows '8 hours/day x 5 days/week = Total 40 hours'. There is an 'On' toggle switch.
- Job Notes:** A section at the bottom with the text 'No notes here!'.

In Bold, under the Shift Schedule section of the job details page



Shift Visibility in Back Office

The screenshot displays the AVIONTE Back Office interface for an order named 'Order_Temp'. The interface includes a main menu on the left, a search bar at the top, and a central area for order details. A red box highlights the 'Shift' section, which includes a dropdown menu set to 'First', a time range from '09:00 AM' to '05:00 PM', and a grid of checkboxes for days of the week (Mon-Sun). A red arrow points to the 'More Info' tab in the right-hand sidebar, which is currently selected. Below the main form, there is a table with the following data:

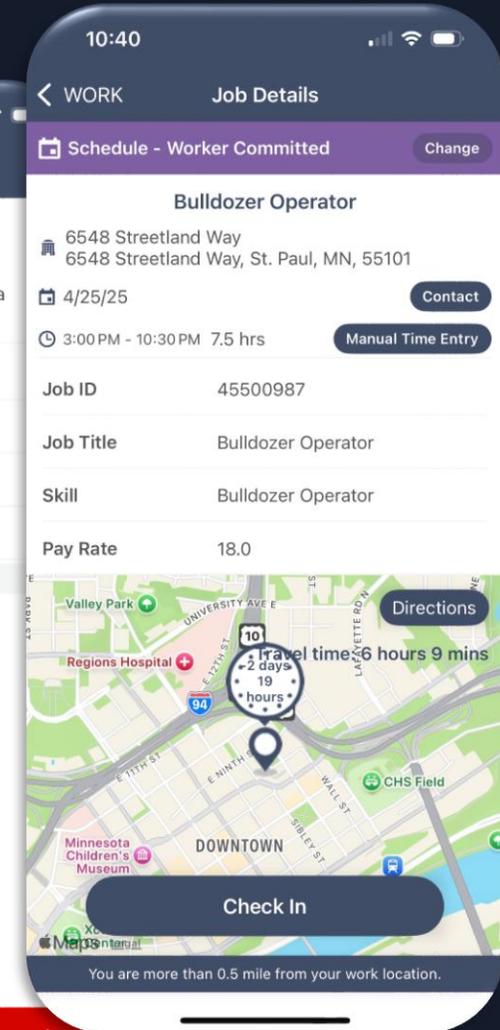
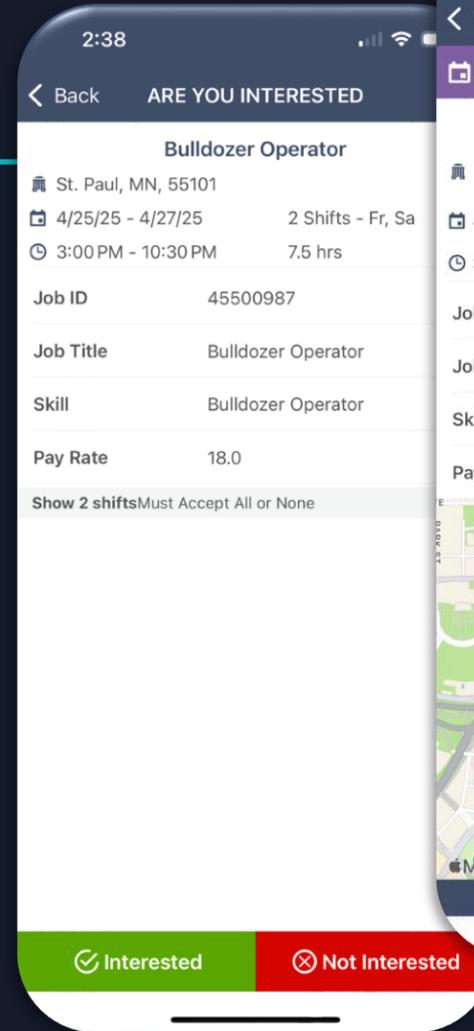
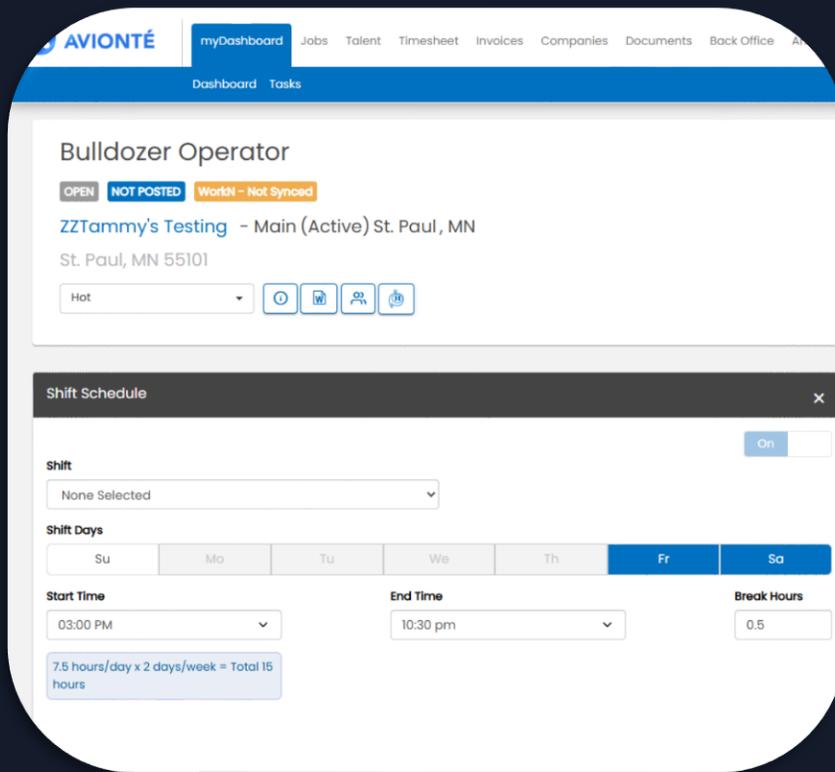
Message	Name	Job Title	AssignmentID	Reg/Salary	Pay Rate	Bill Rate	Performance	StartDate	EndDate	EndReason
	Horrigan, Frank	Secret Service Agent	2427	\$10.00	\$15.00			03/10/2025	03/10/2026	

At the bottom of the interface, there is a status bar with the text: 'MN4058 Production v:25.2.1.0 avi-WORKTRON 3/10/2025'.

In Back Office, under the More Info tab of the order details



Shift Visibility for Talent



User-controlled shift visibility—talent-facing only when needed!



Best Practices



ADDITIONAL TOOLS



Consistent naming conventions

Use a consistent naming convention that makes templates easy to find



Include client name in company-level templates



Specific descriptions

Be specific in descriptions to help your team select the right template



Quarterly template reviews

Review and update templates quarterly to ensure accuracy



Plan ahead for seasonal shifts

Create templates for seasonal shifts in advance



Use Cases & Benefits

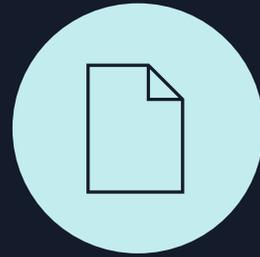


Pain Points

10+ minutes per job order



< 1 minute per job order



Apply Template

Time saved: 9+ minutes
per job order



Reports

Open Position Snapshot Report

Status, Job Type, Company Saved Filters 📄 ⚙️

Status	Job Type	Company	Date Opened	Branch	Position	Job Board L	Required Po	Open Positi	Shift	Hiring Mana	Filled Ratio	Position Bud	Target Pay R	Target Bill R	Target Salat	Days Op
Open	Internal Perm	Erik Test Co...	Feb 25, 2025...	Connect 2022	test	Lakeville, MN	1	1	1st	Schedule M...	0	\$15.00	\$0.00	\$0.00	\$15.00	63
Open	Contract	Erik Test Co...	Feb 25, 2025...	Connect 2022	test calls	Lakeville, MN	1	1	1st	Schedule M...	0	\$25.00	\$15.00	\$25.00	\$0.00	63
Open	Contract	Erik Test Co...	Feb 25, 2025...	Connect 2022	testing testi...	Lakeville, MN	1	1	1st	Schedule M...	0	\$25.00	\$20.00	\$25.00	\$0.00	63
Open	Contract	The Avengers	Mar 6, 2025 ...	Minneapolis	With Templa...	Scranton, PA	1	1	1st	Maria Hill	0	\$21.00	\$18.00	\$21.00	\$0.00	54
Open	Contract	The Avengers	Mar 6, 2025 ...	Minneapolis	No Templat...	Scranton, PA	1	1	2nd	Maria Hill	0	\$30.00	\$25.00	\$30.00	\$0.00	54
Open	Contract	Connor's LE...	Apr 14, 2025 ...	Connect 2022	LEGO Assem...	Milwaukee, ...	1	1	3rd Shift 12 hr	Connor Kilp	0	\$22.40	\$16.00	\$22.40	\$0.00	15
Open	Contract	Connor's LE...	Apr 14, 2025 ...	Connect 2022	Assembly 1st...	Milwaukee, ...	1	1	Assembly First Shift	Connor Kilp	0	\$20.85	\$15.00	\$20.85	\$0.00	15
Open	Contract	Wickard Acc...	Aug 30, 202...	Connect 2022	Test Accoun...	Eagan, MN	2	1	CS Afternoon	David Wicka...	50	\$0.00	\$0.00	\$0.00	\$0.00	242
Open	Contract	Wickard Acc...	Apr 14, 2025 ...	Connect 2022	Test Accoun...	Eagan, MN	2	2	CS Afternoon	David Wicka...	0	\$0.00	\$0.00	\$0.00	\$0.00	15
Open	Contract	Wickard Acc...	Apr 14, 2025 ...	Connect 2022	Test Accoun...	Eagan, MN	2	2	CS Afternoon	David Wicka...	0	\$0.00	\$0.00	\$0.00	\$0.00	15
Open	Contract	Erik Test Co...	Mar 10, 2025 ...	Connect 2022	test	Lakeville, MN	1	1	Demo Demo Demo	Schedule M...	0	\$25.00	\$15.00	\$25.00	\$0.00	50
Open	Contract	Erik Test Co...	Feb 18, 2025 ...	Minneapolis	Forklift Driver	Lakeville, MN	1	1	First	Schedule M...	0	\$50.00	\$45.00	\$50.00	\$0.00	70
Open	Contract	Experience L...	Apr 15, 2025 ...	Connect 2022	JC TESTER	Texarkana, A...	1	1	Justin PM	Bob Smith	0	\$0.00	\$0.00	\$0.00	\$0.00	14
Open	Contract	Frank's Fram...	Apr 14, 2025 ...	Connect 2022	Industrial	Eagan, MN	10	10	LH 1st Shift	Frank Johns...	0	\$36.40	\$28.00	\$36.40	\$0.00	15
Open	Contract	Frank's Fram...	Apr 14, 2025 ...	Connect 2022	Industrial	Eagan, MN	10	10	LH Day Shift - 12 hour	Frank Johns...	0	\$31.25	\$25.00	\$31.25	\$0.00	15
Open	Contract	ZZDynamic ...	Apr 15, 2025 ...	Minneapolis	Distribution ...	Eagan, MN	1	1	M-F 1st	ZZSarah ZM...	0	\$0.00	\$0.00	\$0.00	\$0.00	14
Open	Contract	Google	Apr 18, 2025 ...	dsf test sn	Testing that ...	Austin, AL	1	1	MC Google Testing	ZZMichellez ...	0	\$33.25	\$25.00	\$33.25	\$0.00	11
Open	Contract	Google	Apr 18, 2025 ...	dsf test sn	Testing that ...	Austin, AL	1	1	MC Testing	ZZMichellez ...	0	\$33.25	\$25.00	\$33.25	\$0.00	11
Open	Internal Perm	Ministry of M...	Feb 27, 2025 ...	Connect 2022	Transporter	Seattle, WA	13	12	Magical Transportation	Rubeus Hag...	7.69	\$1,300.00	\$0.00	\$0.00	\$1,300.00	61
Open	Contract	Wedding Ve...	Apr 15, 2025 ...	Connect 2022	Hathaway ...	St Marys, GA	5	5	Party Shifts - MS	Rebecca Bla...	0	\$25.42	\$15.50	\$25.42	\$0.00	14
Hot	Contract	Erik Test Co...	Aug 29, 2024...	Connect 2022	test missing ...	Lakeville, MN	1	1	Test	Schedule M...	0	\$25.00	\$20.00	\$25.00	\$0.00	243
Open	Contract	Erik Test Co...	Feb 13, 2025 ...	Connect 2022	test test test	Lakeville, MN	1	1	Test	Schedule M...	0	\$25.00	\$15.00	\$25.00	\$0.00	75

Total Items: 845 (Showing Items: 1 - 500)

Export To



Reports

Job Detail Report

Job Employer, Job Office, C Saved Filters 📄 🏠

Job Employ	Job Office	Company Q	Company	Shift	Job Start Da	Required Po	Open Positi	Company R	Req ID	Hiring Mana	Job Owner	Job Status	Job Type	Position	Job
ABC Staffing	Mini Apples	Mini Apples	Sharp Electr...	Jamie's Test	May 5, 2025	1	0	Jamie Flores	45433412	Heather Mar...	Jamie Flores	Filled	Contract to ...	HR Manager	
Connect 2022	Connect 2022	Connect 2022	Frank's Fram...	LH Day Shift ...	May 1, 2025	10	10	Lauren Hoen	45431834	Frank Johns...	Lauren Hoen	Open	Contract	Industrial	Me
Connect 2022	Connect 2022	Connect 2022	Frank's Fram...	LH 1st Shift	May 2, 2025	10	10	Lauren Hoen	45431899	Frank Johns...	Lauren Hoen	Open	Contract	Industrial	Me
Connect 2022	Connect 2022	Connect 2022	Frank's Fram...		May 22, 2025	10	10	Lauren Hoen	45431950	Frank Johns...	Lauren Hoen	Open	Contract	Industrial	Me

Report Filters

Office
All

Company
All

Job Owner
All

Job Type
All

Sales Rep
All

Job Status
All

Date Type
Job Start Date

Date From
Select Date

Date To
Select Date

Date Range
Next Month

Run Report



Avionte | Customer

Search Type: Set Name Search Search Criteria

Customer

Main Menu

- Front Office
 - Employee
 - Customer
 - Order
 - Assignment
 - Agency
- Back Office
 - Time Entry
 - Payroll
 - Billing
 - Invoice
 - AR
 - Paycheck
 - Weekly Process
 - Import/Export
- Search
- Summary
- Detail
- Message
- Sales & Service
- Order Options
- Assignment
- Extra
- Documents
- BackOffice Setup
 - Credit
 - Billing Setup
 - AR Balance
 - Work History

Start Page Search Summary **Billing Setup** Order Options

Invoice Option

Invoice to Department: Corporate

Invoice Style: Avionte Default Invoice

Separate Invoice By: ShiftName

Group Inv	Choice Code	Choose
Sort Invo	Max Invoice Amount	<input type="checkbox"/>
Display In	PO #	<input type="checkbox"/>
Email Invo	PO Number	<input type="checkbox"/>
Order Co	ShiftName	<input checked="" type="checkbox"/>
Include P	StaffingOrderID	<input type="checkbox"/>

Statement Letter

Include Finance Charges

Increase Balance Amount Due

Finance Charge Percent: .00%

Finance Charge Grace Period: 0

Automatically Email Monthly Statements

Day Of Month To Send

Email Statements To

Billing and Scheduling

Billing Period

Billing Cycle

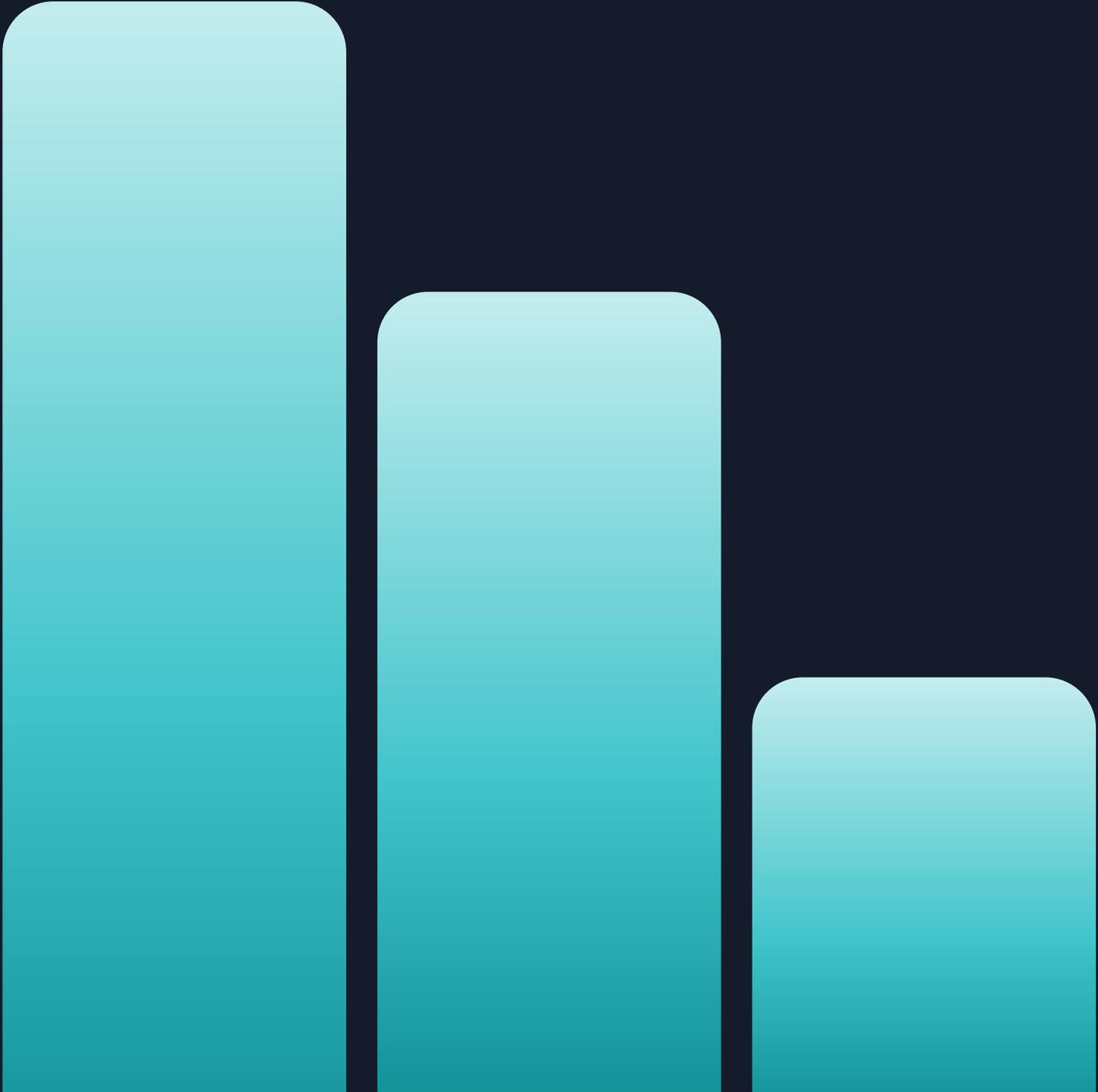
Payment Terms: Net 10 Days

Max Invoice Amount: \$0.00

ActionType Subject Message Date

In Back Office, Separate Invoices using ShiftName





Error Reduction

- Significant reduction in scheduling complaints
- Decrease in schedule-related no-shows
- Near elimination of billing disputes



Client & Talent Impact

The improvement in client and talent experience can be substantial:

Consistent communication

Higher client satisfaction

Improved talent retention



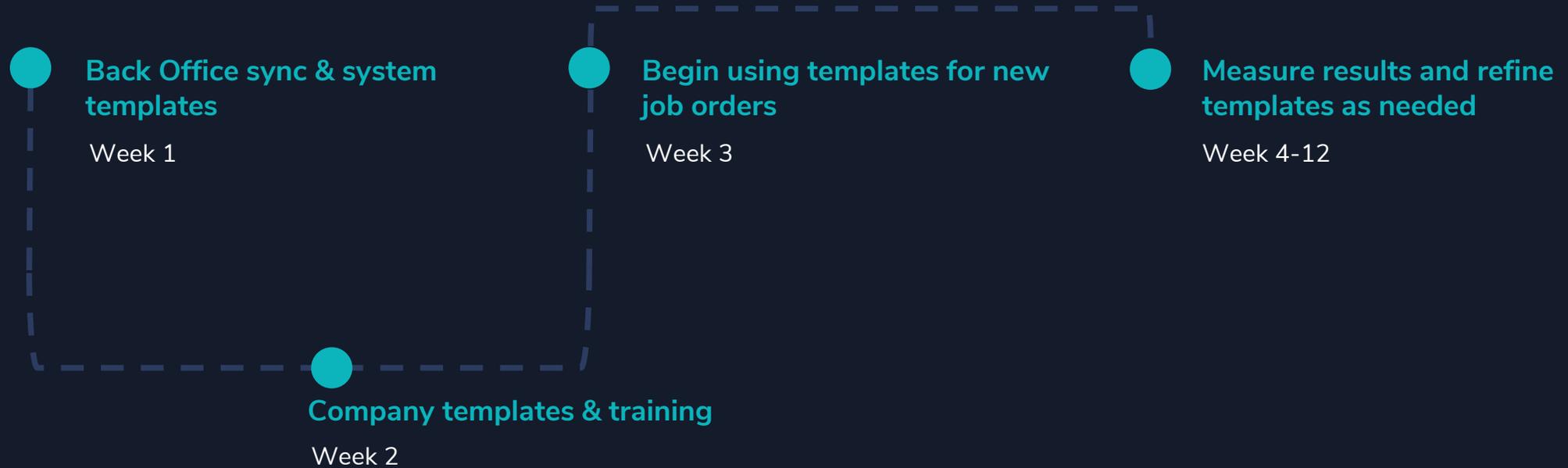


Measuring Success

1. **Time spent** creating job orders (before and after)
2. **Error rates** in scheduling communications
3. **Candidate no-show** percentages
4. **Client satisfaction scores** related to scheduling accuracy
5. **Number of job orders** managed per recruiter

We recommend establishing a baseline for these metrics before implementation and then measuring again at 30, 60, and 90 days post-implementation.

Implementation Timeline



FAQs

- **Break Hour Field Functionality Clarification**

- The break hour field is intended for paid break hours; the break hours in this area do **NOT** reduce the total working time calculated by Avionte when entered
- Only a total amount of paid break hours can be inserted at this time; no additional enhancements for this area are currently planned
- When entering break hours, the arrows to add break hours in the field are at 1 hour increments; however, you can enter decimals to indicate break times shorter than 1 hr (15 min = .25 hrs, 30 min = .5 hrs)

- **Shift Name is visible in the following locations:**

- Shift Schedule widget of the Job Details Screen
- More Info Tab of the Order Details Sub Menu Item
- Standard Reports: Active Consultant, Job Detail, Open Position
- INSIGHTS Reports: Comprehensive Job, Comprehensive Placement
- Not visible on Dashboard Widgets



FAQs

- **When are shift details visible in Back Office?**
 - When the Job Order with a shift schedule added is created
- **Will recruiters be required to confirm the shift schedule when assigning a candidate to a Job Order?**
 - No, the Shift Schedule is attached to the Job Order and cannot be edited at the individual assignment level
- **Are we able to change the schedule for a candidate currently on assignment?**
 - No, to add or update a schedule a new Job Order and assignment would need to be created
- **Are we able to add variable shifts? (ie: M/W/F this week, Tue/Thur next week)**
 - No, the Shift Schedule is a regular and recurring schedule (ie: M-F, 7-3:30)



Bonus Tips!

- **When implementing Shift Schedule Templates – take a look at any Talent Tags related to Shifts and update to allow for easier matching between Shift need and Talent availability or preference!**
 - Admin Users can view Talent Tags by navigating to Table Editor > Talent Tags
- **Multiple Shift Schedule Templates can be attached to ONE (1) Job Order Template**
 - If you have a Client that needs Forklift Operators for Three shifts, you can create One Job Order Template and attach 3 Shift Schedule Templates and select the appropriate shift from the dropdown when creating the Job Order
 - This will simplify the number of Job Order Templates you need for your Client!



Knowledge Check

What are the two types of shift templates available in Bold?

A. Standard and Custom

B. System and Company

C. Global and Local



Knowledge Check

Which information is saved in a shift template?

A. Just the start time

B. Only the days of the week

C. Start time, end time, days, and breaks



Resources

- Scan the code to the right to access our [Knowledge Base Article](#) with a [Micro Video](#) for set up
- Recording will be emailed



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Registration Open



August 4-6, 2025
[Hilton Minneapolis](#)

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