

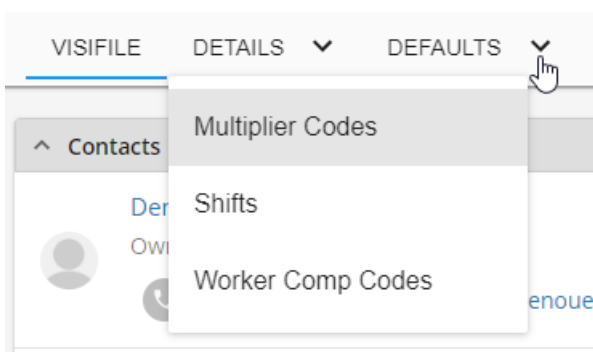
Beyond - Managing Customer Defaults

Last Modified on 04/18/2024 3:43 pm CDT

What are Customer Defaults?

The Defaults tab allows users to establish standards for multiplier codes and shifts that apply to the customer so they automatically flow into that customer's orders. When properly set, this can be a powerful tool to expedite the creation of orders and eliminate making errors.

To find Customer Defaults, navigate to the Customer record and select the Defaults tab:



Customer Default Options:

1. [Multiplier Codes](#)
2. [Shifts](#)

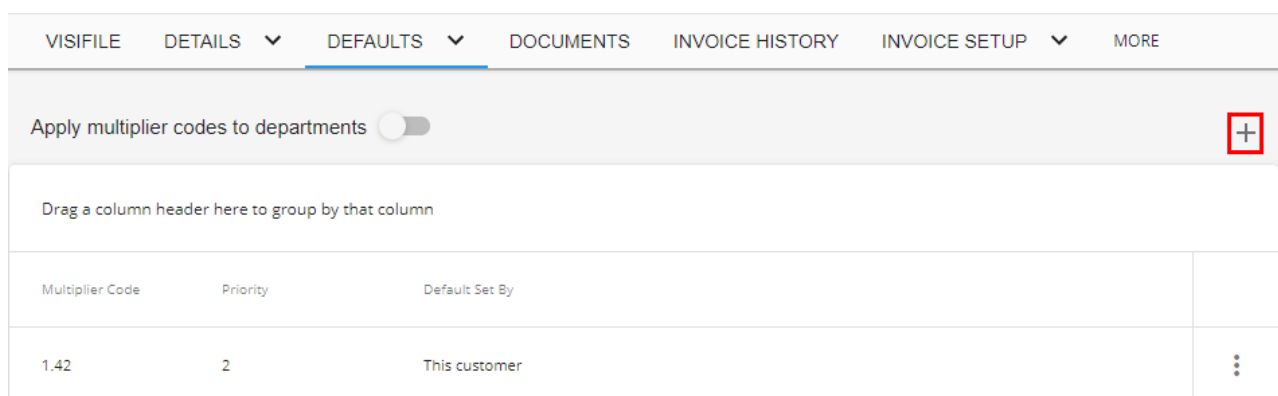
3. Worker Comp Codes

4. Job Descriptions

Multiplier Codes

Multiplier codes, or markups, allow for the generation of a bill rate based on the pay rate when entered into the order's financial card.

Select the multiplier code option from the drop-down. Here, current multiplier codes can be viewed and new ones can be added. Click the '+' icon to open the add multiplier code window:

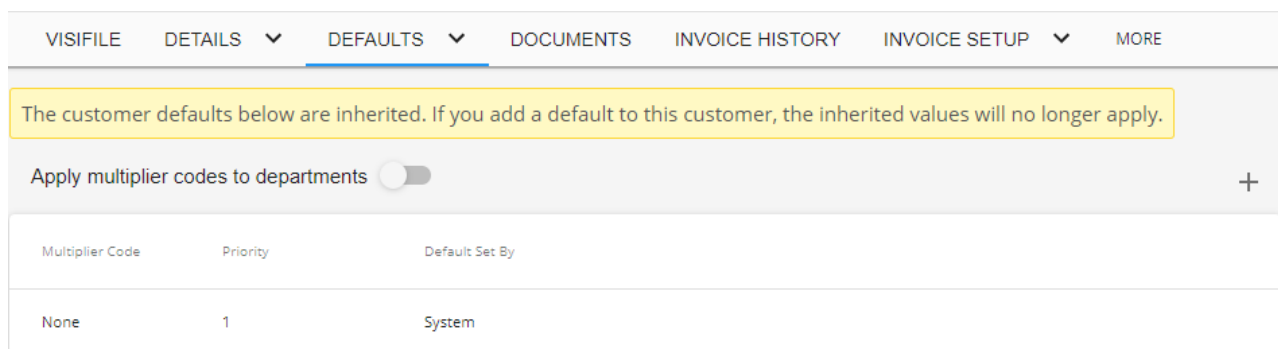


The screenshot shows a navigation bar with 'DEFAULTS' selected. Below it is a toggle for 'Apply multiplier codes to departments' and a red '+' icon. A table below contains one row with the following data:

Multiplier Code	Priority	Default Set By	
1.42	2	This customer	⋮

In the upper left-hand corner, the system highlights the section users are currently viewing. The following example below shows users are in the Customer > Defaults > Multiplier Codes.

Note If this is the first time you are setting up a multiplier code for this customer, note that the system will display "None" with a priority of 1 and the following message will display:



The screenshot shows a message box at the top: "The customer defaults below are inherited. If you add a default to this customer, the inherited values will no longer apply." Below it is a toggle for 'Apply multiplier codes to departments' and a '+' icon. A table below contains one row with the following data:

Multiplier Code	Priority	Default Set By	
None	1	System	

Once the '+' icon is selected, the system will open the multiplier code window.

From the drop-down, select the matching code:

Add Default Multiplier Code

Multiplier Code

1.31

Multiplier Code	Reg. Markup	OT Markup	DT Markup
None	1	1	1
1 to 1	1	1.5	2
1.015	1.015	1.015	1.015
1.2	1.234	1.234	1.234

Note If you have not yet established multiplier codes in Administration, the drop-down will be blank. For more information on adding multiplier codes, see [Creating Multiplier Codes](#).

Add Default Multiplier Code

Multiplier Code
1.31

Priority
1

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Priority: A numeric value which will determine the placement of this code in the order and assignment details page multiplier code drop-down list. Priority 1 is the order multiplier default for the customer. Users may add as many as codes as necessary to a customer record, however, no two codes can share the same priority value.

The priority is automatically assigned as the next available number, following a standard numerical order. Click 'Submit' in the lower right to close the window and add the new multiplier code. Any/all saved codes will immediately display in the multiplier codes table.

VISIFILE DETAILS ▾ **DEFAULTS ▾** DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MORE

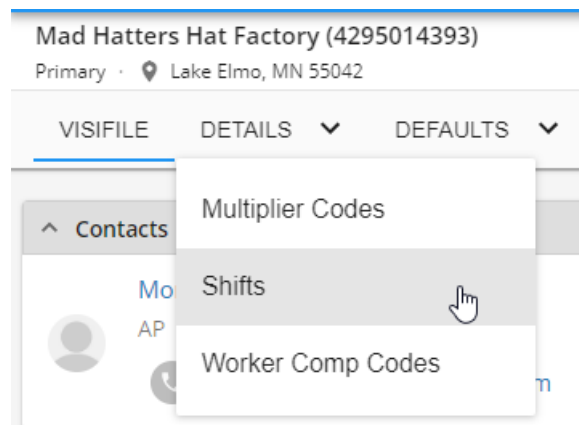
Apply multiplier codes to departments +

Multiplier Code	Priority	Default Set By	
1.31	1	This customer	⋮

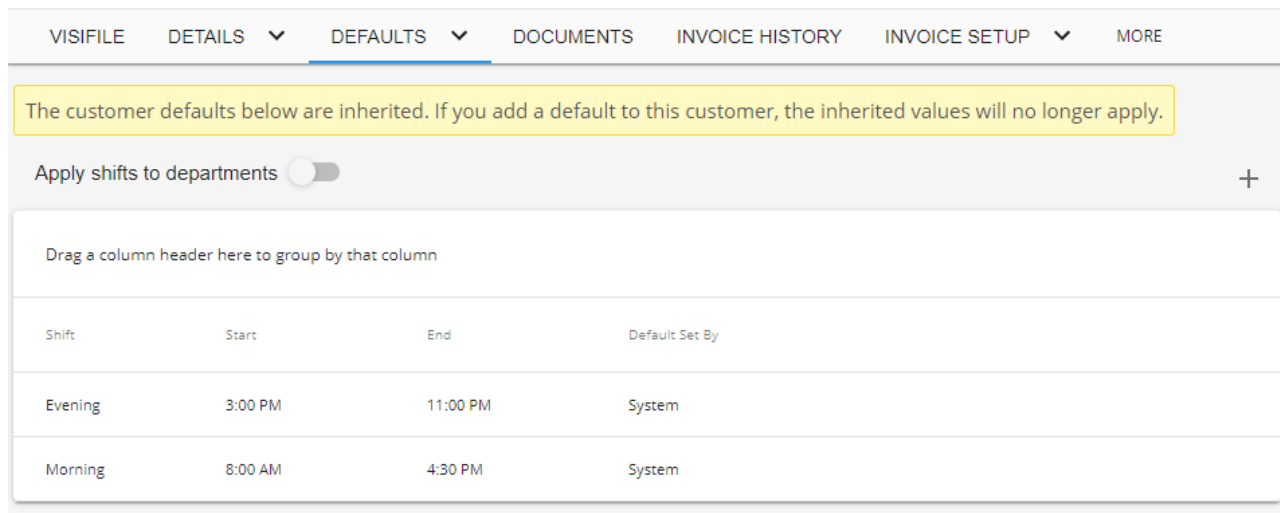
Shifts

Shifts are the customer specific start times, end times, break times, and days that employees are scheduled to work. Shifts that display here will automatically populate into the parallel shift fields within the 'Job Information' card of the 'Details' tab for all new orders for this customer.

To add a shift, select 'Shifts' from the defaults tab and icon to open the 'Shifts' window:



In the upper left hand corner, the system highlights the section users are currently viewing. The following example below shows users are in the Customer > Defaults > Shifts.

A screenshot of the 'Shifts' configuration page. At the top, there are navigation tabs: 'VISIFILE', 'DETAILS', 'DEFAULTS', 'DOCUMENTS', 'INVOICE HISTORY', 'INVOICE SETUP', and 'MORE'. The 'DEFAULTS' tab is active. Below the tabs is a yellow warning box: 'The customer defaults below are inherited. If you add a default to this customer, the inherited values will no longer apply.' Below the warning is a toggle switch for 'Apply shifts to departments' which is currently off. To the right of the toggle is a '+' icon. Below the toggle is a table with the following data:

Shift	Start	End	Default Set By
Evening	3:00 PM	11:00 PM	System
Morning	8:00 AM	4:30 PM	System

Select the '+' icon to open the 'Add Default Shift' wizard:

Shift	Start	End	Default Set By	
Graveyard	10:00 PM	6:00 AM	This customer	⋮

Apply shifts to departments

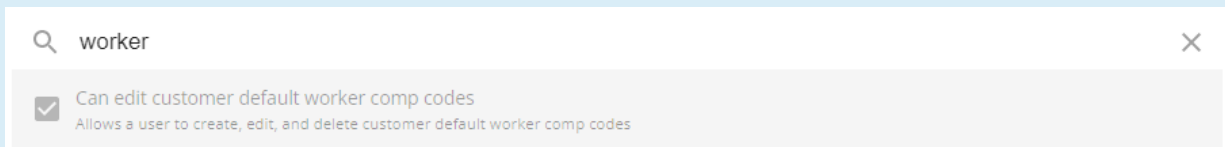
Edit

Delete

Note The system shift defaults will disappear after at least one shift has been added. They will have to be recreated to utilize those shifts.

Worker Comp Codes

Note If you utilize default Security Groups, you will need to ensure the "Can edit customer default worker comp codes" permission has been added to all the Security Groups that require this functionality:

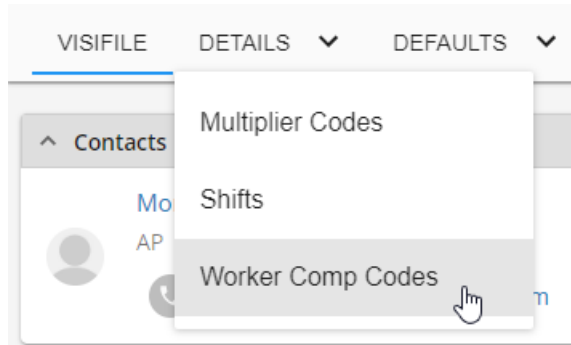


If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Worker Comp Codes" page within Customer > Defaults > Worker Comp Codes along with all associated fields and forms within the dropdowns to the Security Groups that require the functionality:

BY PAGE	BY FIELD	Access
worker comp	X	Selecting a parent selects children <input checked="" type="checkbox"/>
Customer		<input checked="" type="checkbox"/> Access
Defaults		
Worker Comp Codes Page		<input checked="" type="checkbox"/> Access
Add or Edit Default Worker Comp Code Form		<input checked="" type="checkbox"/> Access
Worker Comp Code Field		<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Priority Field		<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Job Order (2)		<input checked="" type="checkbox"/> Access
Assignment (2)		<input checked="" type="checkbox"/> Access

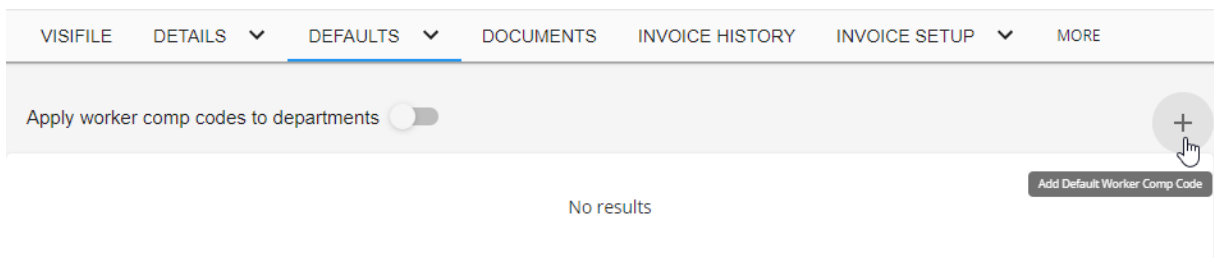
For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

Setting up worker comp code defaults on the customer record allows you to set and rank the only available worker comp options on any order record for this customer. This can help reduce the chance of recruiters or sales selecting the incorrect worker comp code for any given order.



To Add a Default Worker Comp Code:

1. Navigate to the Customer record
2. Select Defaults > Worker Comp Code
3. Select the '+' icon



4. Choose the worker comp code and set a [priority](#)

Add Default Worker Comp Code

Worker Comp Code
Food and Beverage

Priority
1

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5. Select Submit

Job Descriptions

Job descriptions can be a great tool to save staffing specialists time when a job description is consistent for the client within an order. Users may select a job title and enter detailed information in relation to that specific position, in return when the job title is selected within the order the information will pre-populate yet can still be modified on the order if necessary.

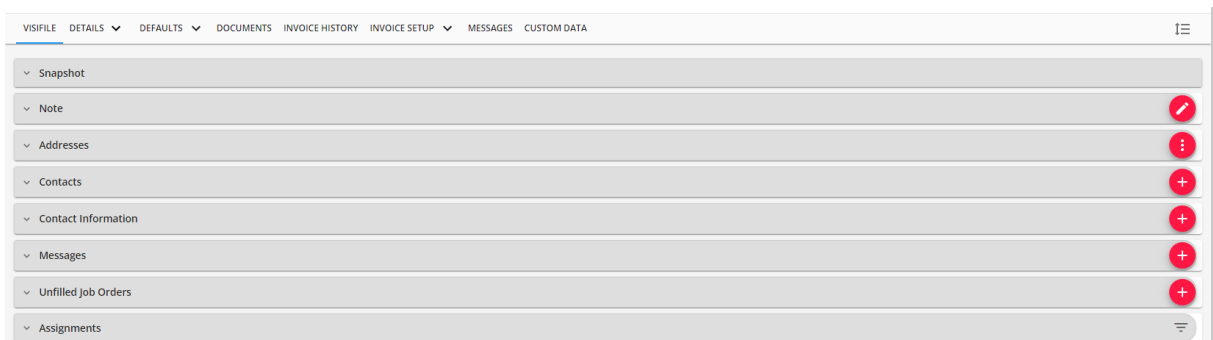
Note If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Job Descriptions" page within Customer > Defaults > Job Descriptions along with all associated fields and forms within the dropdowns to the Security Groups that require the functionality:



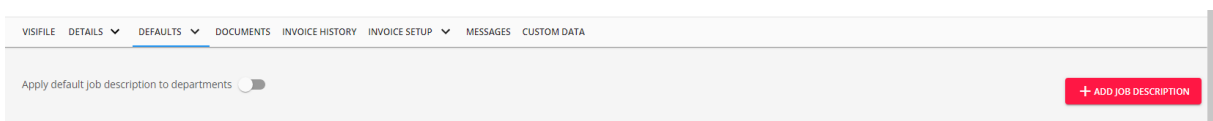
For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

To add a default job description:

1. Navigate to the customer you want to add a default job description for:



2. Select Defaults > Job Descriptions to navigate to the "Job Descriptions" page:



3. Select "+ Add Job Description" in the upper right:

4. Within the "Add Job Description" window, select the Job Title your recruiters would select on the Job Order:

Add Job Description

* Job Title Public Job Title
 12 hour nurse weekend

5. Enter the Job Description:

Add Job Description

* Job Title Public Job Title
 12 hour nurse weekend

* Job Description
 This is a job for nurses working 12 hour shifts over the weekend.

6. Optionally, if you are posting to the Job Board, enter a "Public Job Description" and a "Public Job Title" that will display on the Job Board:

Add Job Description

* Job Title Public Job Title
 12 hour nurse weekend

* Job Description
 This is a job for nurses working 12 hour shifts over the weekend.

Public Job Description

B *i* U **A** ▾ **AA** ▾ **A** **A:** ▾ ▾ ▾ ▾ ▾ ▾ **¶** **¶** **¶** **+** **+** **+**

Type something

o Please see the article titled [How to Post Orders to the Job Board](#) for more information.

7. Finally, if applicable, enter information within the "Education Summary" and "Experience Summary" fields:

Add Job Description

* Job Title Public Job Title
 12 hour nurse weekend

* Job Description
 This is a job for nurses working 12 hour shifts over the weekend.

Public Job Description

B *i* U **A** **AA** **A:** **A:** **≡** **≡** **≡** **¶** **🔗** **📄** **+** **↶** **↷** **⋮**


Type something

Education Summary

Experience Summary

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8. Once all of the information has been added, select "Submit" to save the Job Description.

Note Default Job Descriptions are able to be edited or deleted within Defaults > Job Descriptions by selecting the  icon to the right of the entry and either selecting "Edit" or "Delete":

VISIFILE DETAILS **DEFAULTS** DOCUMENTS INVOICE HISTORY INVOICE SETUP MESSAGES CUSTOM DATA

Apply default job description to departments **+ ADD JOB DESCRIPTION**

Job Title	Public Job Title	Job Description	Public Job Description	Education Summary	Experience Summary	
12 hour nurse weekend		This is a job for nurses working 12 hour shifts ov...		Test Education Summary	Test Experience Summary	⋮ Edit Delete

Rows per page: 20 1 of 1

Selecting the option for "Apply default job description to departments" will ensure all default job descriptions setup on the primary customer record will also apply to the associated department records:

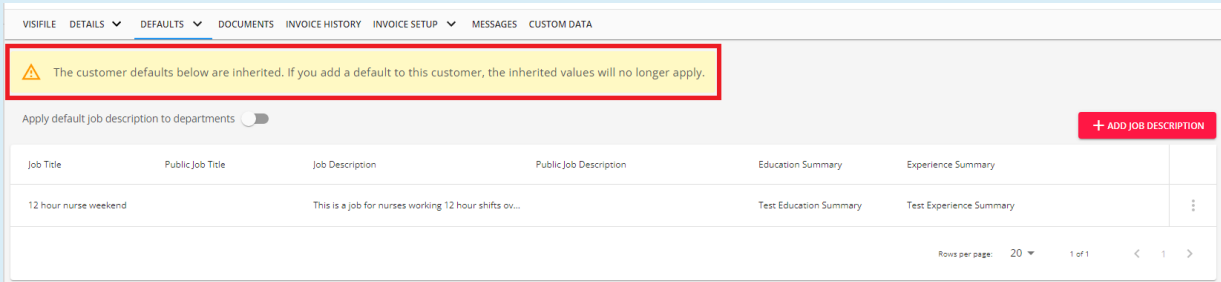
VISIFILE DETAILS **DEFAULTS** DOCUMENTS INVOICE HISTORY INVOICE SETUP MESSAGES CUSTOM DATA

Apply default job description to departments **+ ADD JOB DESCRIPTION**

Job Title	Public Job Title	Job Description	Public Job Description	Education Summary	Experience Summary	
12 hour nurse weekend		This is a job for nurses working 12 hour shifts ov...		Test Education Summary	Test Experience Summary	⋮

Rows per page: 20 1 of 1 < 1 >

Note When navigating to a department record associated with the primary that has default job descriptions applied to all departments, you will see the following banner:



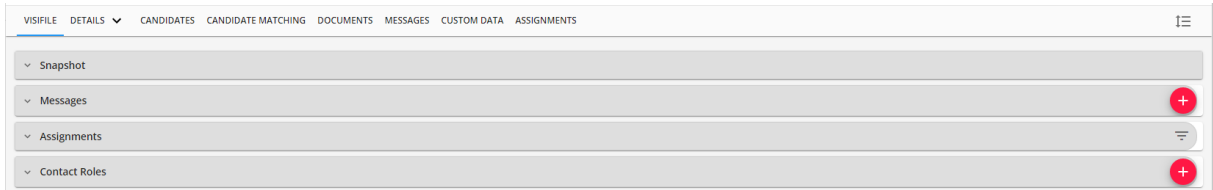
This means that if a new default job description is added to the department record, the previous default job descriptions will be removed.

Deleting the new default job description(s) will allow the original defaults from the primary record to appear within the department.

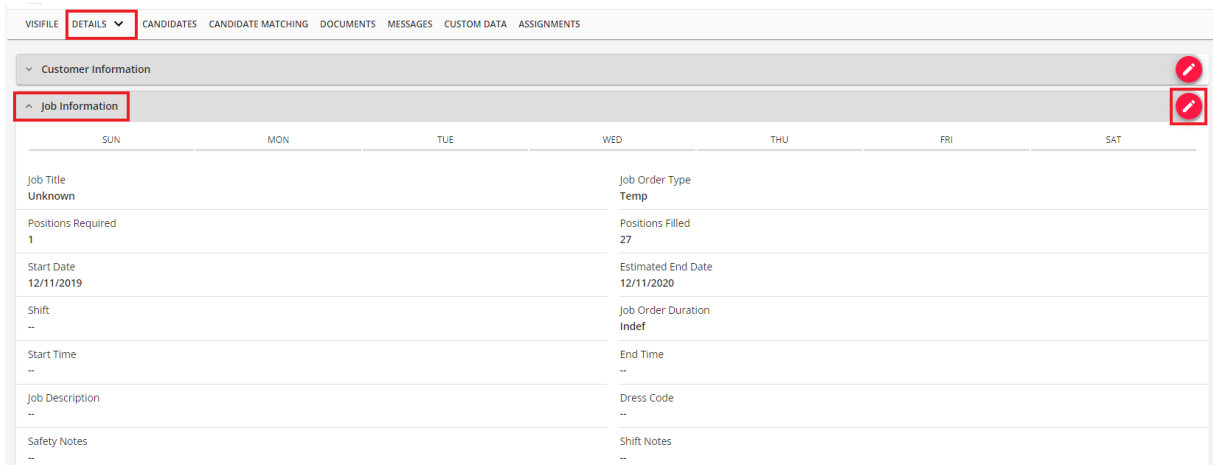
Therefore, it is recommended to add default job descriptions to the primary customer record if utilizing the option "Apply default job description to departments".

To apply a default job description to a Job Order:

1. Navigate to the Job Order record that will need the job description added:



2. Navigate to Details > Job Information > Edit to open the "Job Information" window:



3. Within the "Job Information" window, select the Job Title that corresponds to the default job description that was setup on the customer record:

Job Information

* Job Title
Unknown

* Job Order Type
TE

4. Once selected, you will be prompted with a message to override the description with the default saved one:

Job Information

* Job Title
12 hour nurse weekend

* Job Order Type
TE

You have selected a default Job Title, there is a default Job Description linked. Would you like to apply this Job Title's default Job Description, Public Job Description, Public Job Title, Education Summary, and Experience Summary?

APPLY DEFAULT X

5. Select "Apply Default" within the prompt and the default information will populate on the Job Order:

Job Information

* Job Title
12 hour nurse weekend

* Job Order Type
TE

You have selected a default Job Title, there is a default Job Description linked. Would you like to apply this Job Title's default Job Description, Public Job Description, Public Job Title, Education Summary, and Experience Summary?

APPLY DEFAULT X

6. Select "Submit" to apply the changes to the Job Order.

Related Articles