

Beyond - Quick View

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The Quick View

Beyond offers an easy way to manage records in the system called 'the quick view.'

This is a special side bar that will be appear when you right click on a record in Beyond.

Whether interacting with records displayed in the 'bookmarks' section or while reviewing records from a search, a simple right click will give the user a way to interact with a record rather than navigating directly to it.

The screenshot displays the Beyond system interface. At the top is a navigation bar with icons for EMPLOYEES, CUSTOMERS, CONTACTS, JOB ORDERS, ASSIGNMENTS, and PROSPECTS. A search bar labeled 'Search Anything...' is on the right. Below the navigation bar is an 'ACTIVITY PANEL' on the left with sections for 'Bookmarks' and 'Recent History'. The main area shows a search for 'Employees' with filters for 'Last Name' (robin), 'First Name' (First), 'Employee Id', and 'Government Id'. The search results table has columns: Employee Id, Last Name, First Name, Branch, Is Active, Is Assigned, Last Message, and Zip Code. The first row, with Employee Id 4295097670, is highlighted with a red box. To the right of the table is a 'Quick View' sidebar for Christopher Robin, showing his profile, contact information, and various action buttons like 'ACTIVE', 'ACA', 'WEB USER', 'E-VERIFY', 'ONBOARDING', 'TASKS', 'E-PAY', 'BACKGROUND', 'ASSIGNMENTS', 'CREATE RESUME', 'MERGE RECORD', 'REPORTS', and 'INTERVIEWS'.

Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	Zip Code
4295097670	Robin	Christopher	High Tech NW	✓	✓	Friday Check	55125
4295167880	Robinson	Abbey	High Tech NE	✓	✗		
4295202356	Robinson	Abbey	High Tech NE	✓	✗		
4295037477	Robinson	Abbey	High Tech NE	✓	✗		11223
4295236832	Robinson	Abbey	High Tech NE	✓	✗		

Once opened, 'quick views' give us a snapshot of the particular record we are attempting to access.

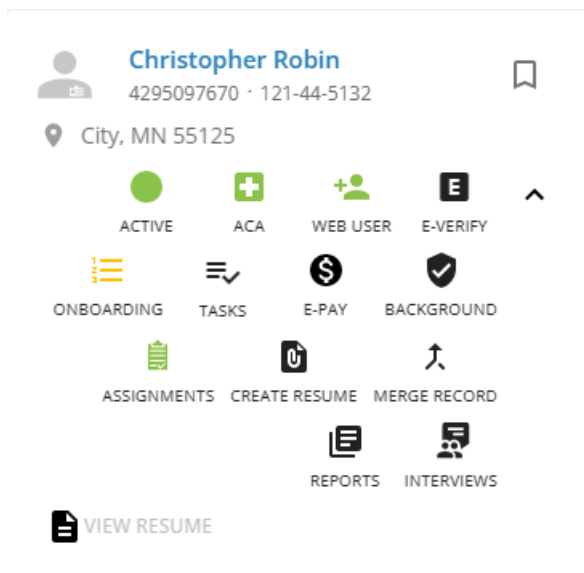
The quick view is available on the following record types:

1. [Employee Quick View](#)
2. [Customer Quick View](#)
3. [Contact Quick View](#)
4. [Order Quick View](#)
5. [Assignment Quick View](#)

Employee Quick View

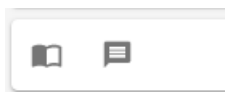
A 'quick view' of the employee record can be broken out into 4 major sections:





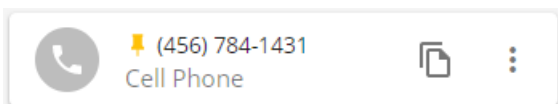
Here, users may observe details concerning the status of the employee including their charms. This section also includes links to the employee's address and their resume.

The Actions Section:



This section gives users the ability to add a new contact method or message to the employee's record.

The Contact Section:



Here, users will be able to note and add to the various contact methods set up on the employee's record. By selecting the email of an employee, users may directly email that employee provided the user has their email integrated into the system.

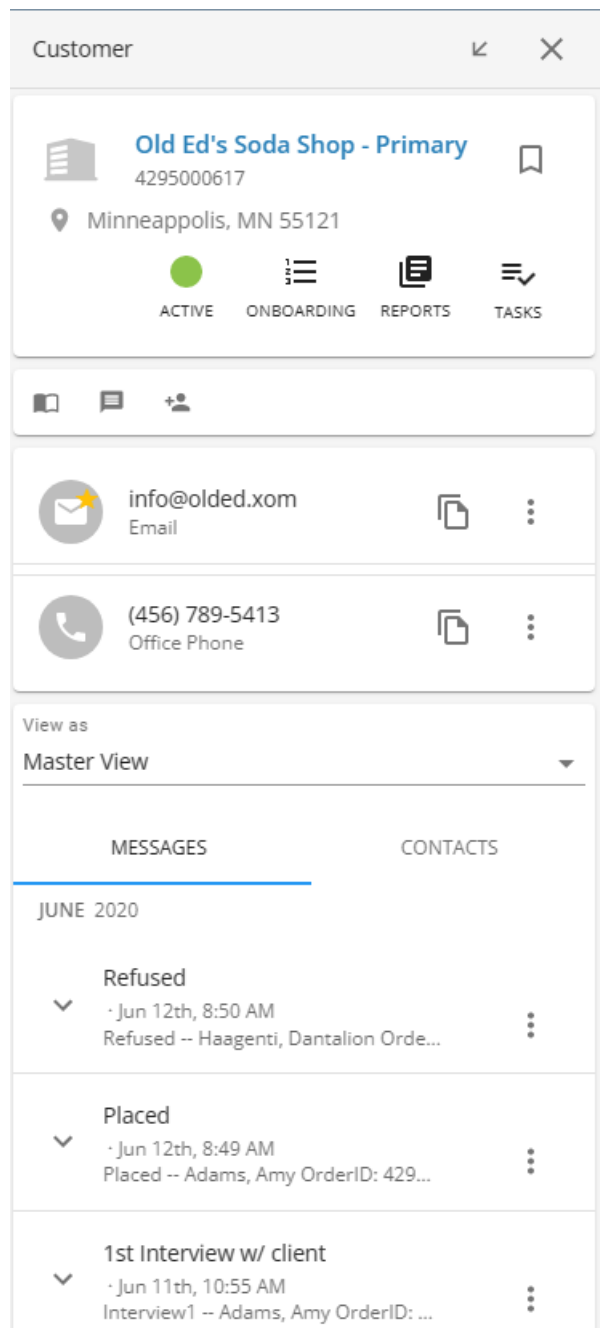
The Information Section:

MESSAGES	STORY	INTEREST CODES / SKILLS
MAY 2020		
<div> <div>▼</div> <div>Friday Check</div> <div>· May 29th, 2:51 PM</div> <div>Called and talked to Chris. He is still e...</div> </div>		⋮
<div> <div>▼</div> <div>Buzz Offered</div> <div>· May 22nd, 8:51 AM</div> <div>The employee Robin, Christopher has...</div> </div>		⋮
APRIL 2020		
<div> <div>▼</div> <div>Covid PSL Self Req</div> <div>· Apr 2nd, 1:13 PM</div> <div>Called to Request COVID related leave</div> </div>		⋮
MARCH 2020		
<div> <div>▼</div> <div>Buzz Offered</div> <div>· Mar 4th, 3:59 PM</div> <div>The employee Robin, Christopher has...</div> </div>		⋮
GO TO MESSAGES PAGE		

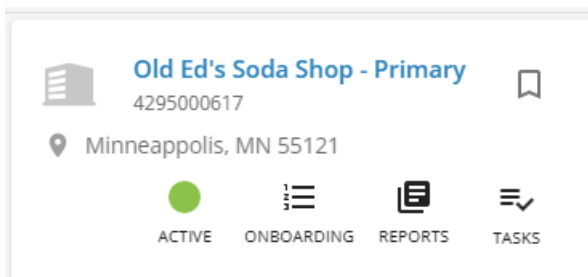
This section provides you with recent messages logged, story information, and interest codes for the employee.

Customer Quick View

A 'quick view' of the customer record can be broken out into three major sections:

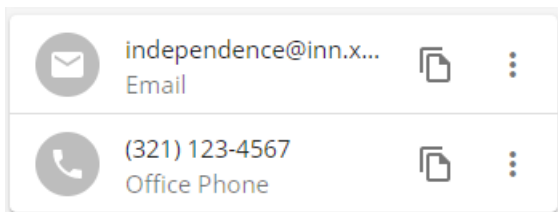


The Avatar Section:



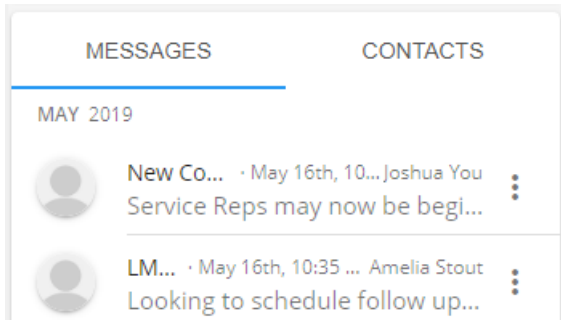
Here, users may observe details concerning the status of the customer including this customers charms. It also includes a link to the customer's address which opens a Google Maps location within a new tab in the browser.

The Contact Section:



Here, users will be able to note and add to the various contact methods set up on the customer's record. By selecting the email of a customer, users may directly email that customer provided the user has their email integrated into the system.

The Information Section:




This section lists recent messages logged and active contacts related to this customer.

To log a new message use the  button.


Contact Quick View


A 'quick view' of the contact record can be broken out into three major sections:


Contact





Vance Adler
13940 · Supervisor




Minneappolis, MN 55121



ACTIVE


REPORTS




WEB USER



TASKS





vance@oldedsoda.xom
Email




(456) 789-1111
Office Phone






MESSAGES

MAY 2020





Presented Position
· May 29th, 2:48 PM
Present -- Sanders, James OrderID: 42...







Refused
· May 29th, 2:47 PM
Refused -- Newman, Stacy OrderID: 4...






Presented Position
· May 29th, 2:46 PM
Present -- Dish, Pete OrderID: 429503...






Order Candidate
· May 29th, 2:44 PM
Candidate -- Cook, Lynn OrderID: 429...





GO TO MESSAGES PAGE


The Avatar Section:





Vance Adler
13940 · Supervisor


Minneappolis, MN 55121


ACTIVE

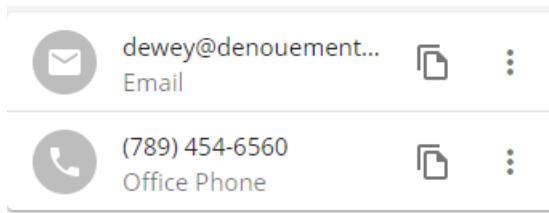

REPORTS


WEB USER


TASKS

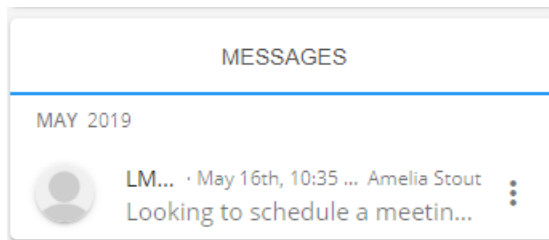
Here, users may observe details concerning the status of the contact including its charms. It also includes a link to the contacts address which opens a Google Maps location within a new tab in the browser.

The Contact Section:



Here, users will be able to note and add to the various contact methods set up on the contact's record. By selecting the email of a contact, users may directly email that contact, provided the user has their email integrated into the system.

The Message Section:




This section displays recent messages logged on the contact's record.

To log a new message use the  button.

Order Quick View


A 'quick view' of the order record can be broken out into three major sections:

Job Order




Old Ed's Soda Shop - Primary


4295035815




Customer Service Rep.: 6 of 3 positions filled




ACTIVE




REPORTS



TASKS



COPY ORDER



SUN

MON

TUE

WED

THU

FRI

SAT

Shift

Morning

Positions Required

3

Start Date

8/7/2019

Job Order Type

Temp

Positions Filled

6

Exp. End Date

--

MESSAGES

CONTACT ROLES

JUNE 2020

Refused

Jun 12th, 8:50 AM

Refused -- Haagenti, Dantalion Orde...

⋮

Placed

Jun 12th, 8:49 AM

Placed -- Adams, Amy OrderID: 429...

⋮


1st Interview w/ client

Jun 11th, 10:55 AM

Interview1 -- Adams, Amy OrderID: ...


⋮

The Avatar Section:




Old Ed's Soda Shop - Primary


4295035815




Customer Service Rep.: 6 of 3 positions filled




ACTIVE



REPORTS



TASKS



COPY ORDER




Here, users may observe details concerning the status of the order including its charms.

The Job Details Section:

SUN	MON	TUE	WED	THU	FRI	SAT
Shift Morning		Job Order Type Temp To Full-Time				
Positions Required 5		Positions Filled 2				
Start Date 5/14/2018		Exp. End Date --				

Here, users will be able to note the detailed specifications of the job order, including the start date, expected end date, and the shift information.

The Information Section:

MESSAGES	CONTACT ROLES
MAY 2019	
 Refu... · May 15th, 11:00 AM Amelia Stout Refused -- Independence Inn...	⋮
 Custome... · May 15th, 11:00 AM Amelia Stout Interview -- Independence Inn...	⋮
 Order C... · May 15th, 11:00 AM Amelia Stout Candidate -- Independence Inn...	⋮

This section shows recent messages logged and any contact roles associated with this order.

To log a new message use the  button.

Assignment Quick View

A 'quick view' of the assignment record can be broken out into three major sections:

Assignment

[↩](#) [✕](#)

Christopher Robin

4302361161 · 100 Acre Woods, Inc. 2 - Primary

ACTIVE

REPORTS

ONBOARDING

TASKS


SEND EMAIL

SUN	MON	TUE	WED	THU	FRI	SAT																				
<table><tr><td>Job Title</td><td>Business Code</td></tr><tr><td>Packer</td><td>Industrial NotHighT...</td></tr><tr><td>Start Date</td><td>Orig Start Date</td></tr><tr><td>1/19/2020</td><td>1/19/2020</td></tr><tr><td>End Date</td><td>Exp. End Date</td></tr><tr><td>--</td><td>11/1/2020</td></tr><tr><td>Start Time</td><td>End Time</td></tr><tr><td>2 pm</td><td>6 pm</td></tr><tr><td>Shift</td><td></td></tr><tr><td>Evening</td><td></td></tr></table>							Job Title	Business Code	Packer	Industrial NotHighT...	Start Date	Orig Start Date	1/19/2020	1/19/2020	End Date	Exp. End Date	--	11/1/2020	Start Time	End Time	2 pm	6 pm	Shift		Evening	
Job Title	Business Code																									
Packer	Industrial NotHighT...																									
Start Date	Orig Start Date																									
1/19/2020	1/19/2020																									
End Date	Exp. End Date																									
--	11/1/2020																									
Start Time	End Time																									
2 pm	6 pm																									
Shift																										
Evening																										

MESSAGES


No messages


The Avatar Section:




Christopher Robin

4302361161 · 100 Acre Woods, Inc. 2 - Primary







ACTIVE




REPORTS



ONBOARDING



TASKS



SEND EMAIL


Here, users may observe details concerning the status of the assignment including its charms.

The Job Details Section:

SUN	MON	TUE	WED	THU	FRI	SAT
Job Title			Business Code			
Warehouse Worker			Production			
Start Date			Orig Start Date			
11/19/2018			11/19/2018			
Exp. End Date			Shift			
12/1/2018			AM shift			
Start Time			End Time			
8:00 AM			4:00 PM			

Here, users will be able to note the detailed specifications of the assignment including the start date, expected end date, and the shift information.

The Message Section:

MESSAGES	
NOVEMBER 2018	
	Accept... · Nov 12th, 2:51 ... hosteval19 Customer: Buy N Large Depar...

This section shows recent messages logged related to the assignment shown.

To log a new message use the  button.

Related Articles