

Beyond - How to Create and Manage Hot Lists

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What are Hotlists?

Hotlists allow you an opportunity to place employees, customers, and/or contacts within given static lists in order to easily access and locate them, without having to run a search.

Hotlists may commonly be used to group employees who have been pre-qualified for a specific customer or skill set, or to track your key or target customers. The hot list section of Beyond can be accessed directly from via B Menu > Hotlists.

Note Employee and Customer hotlists created in Enterprise will also appear in Beyond, and vice versa.

Contact hotlists are new functionality that has only been added to Beyond.

This article covers the following:

1. [Setting Up Permissions](#)
2. [How to Create a Hotlist](#)
3. [Add Employees, Customers, or Contacts to an Existing Hotlist](#)
4. [Searching for Hotlists](#)
5. [Editing or Deleting a Hotlist](#)
6. [Functionality Available Within a Hotlist](#)

Setting Up Permissions

The ability to create hotlists within Beyond is a standard feature and therefore does not require additional standard Security Group permissions.

Note Users have the ability to create "Private" hotlists which make the hotlist viewable by only the user who created that hotlist.

If you or other users should have access to view "Private" hotlists, the "Can Bypass Hotlist Private Flag" permission will need to be added to your intended Security Group:

hotlist



Can Bypass Hotlist Private Flag

Allows a user to see another user's private hotlists.

Note If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Hotlists" pages and forms to the Security Groups that require the functionality:

BY PAGE

BY FIELD

Selecting a parent selects children

hotlist

Hotlists

Access

Details

Page

Access

Update

Hotlist

Contact Member

Form

Access

Note

Field

Read

Write

Update

Hotlist

Customer Member

Form

Access

Note

Field

Read

Write

Update

Hotlist

Employee Member

Form

Access

Hotlist

Step

Field

Read

Write

Hotlist

Note

Field

Read

Write

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

How to Create a Hot List

Hot lists can be created from three different areas:

1. Within B Menu > Hotlists
2. Via an Employee/Customer/Contact search
3. Via the "Add to Hotlist" charm on the Employee/Customer/Contact record

Create a Hotlist from B Menu > Hotlists

Hotlists are separated by record type and can be created for employees, customers, or contacts.

To create a hotlist, navigate to B Menu > Hotlists > "+" icon to the right of the record type you would like to create the hotlist for:

List Name	List Description	List Type	
		All	▼
MY LISTS		ALL LISTS	
▼ Employees 0			+
▼ Customers 0			+
▼ Contacts 0			+

This will open the "New Hotlist" window where you will enter the following:

1. Enter the name of the hotlist.
2. Enter the description of the hotlist.
3. Mark the hotlist as either "Private" (default) or "Public".

New Hotlist for Employees

Fill out the fields below in order to create a new list.

* List name
Employee Hotlist

* Description
Hotlist containing employee records.

Private

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Once the information has been entered, select "Submit" for the hotlist to be created and for it to appear within the "My Lists" tab:

List Name	List Description	List Type	
		All	▼
MY LISTS		ALL LISTS	
^ Employees 1			+
> Employee Hotlist <small>Owned by joshua.kramer</small>	Hotlist containing employee records.	Last Updated 1/25/2023	⋮
<small>Rows per page: 20 1 of 1 < 1 ></small>			

Create a Hotlist via an Employee/Customer/Contact Search

If you have completed an employee, customer, or contact search, and wish to add all, or some of those results to a new hotlist; you can create a hotlist directly from the search result.

To do so, select the "# Selected Employees" dropdown and select "Add to Hotlist" within the search results:

BASIC

ADVANCED

Last Name

Abbott

First Name

C

Employee Id

Government Id

Assigned

Either

Status

Active

Branch

All

Service Representative

All

RESET

SEARCH

Search returned 92 results

3 selected employees

Clear Selection

Download

Email

Log Message for 3 Recipients

Make Candidates

Make Job Offers

Assign

Add to Hotlist

Merge Record

Select up to 2 records to merge

Text 3 Employees

Onboarding

Assign a New Workflow...

Assign a pre-configured workflow and optionally set the starting step or additional pages.

Assign Pages Ad Hoc...

Assign a manually-specified set of pages that are separate from existing workflows.

This will open the "Add to Hotlist" window where you will enter the following:

1. Enter the name of the hotlist.
2. Enter the description of the hotlist.
3. Mark the hotlist as either "Private" or "Public" (default).

Status

Branch

Add to Hotlist

Select an existing hotlist from the dropdown or create a new one.

Existing Hotlists

or

New List Name

Abbott Employees

New Description

Employees with the last name of Abbott

Public

Select Position on Hotlist

Add to top of list

Add to bottom of list

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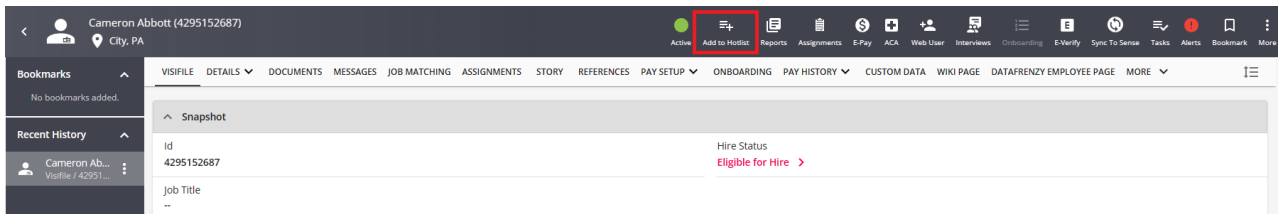
CANCEL

SUBMIT

Once the information has been entered, select "Submit" for the hotlist to be created and for it to appear within the "My Lists" tab.

Create a Hotlist via the "Add to Hotlist" Charm on the Employee/Customer/Contact Record

While on an employee, customer, or contact record, you can create a hotlist for the employee by selecting the "Add to Hotlist" charm:



This will open the "Add to Hotlist" window where you will enter the following:

1. Enter the name of the hotlist.
2. Enter the description of the hotlist.
3. Mark the hotlist as either "Private" (default) or "Public".

A screenshot of the 'Add to Hotlist' form. The form has a title 'Add to Hotlist' and a subtitle 'Select an existing hotlist from the dropdown or create a new one.' Below this, there is a section for 'Existing Hotlists' with a dropdown arrow. Below that, there is a section for 'New List Name' with a text input field containing 'The Cameron Abbott Hotlist'. Below that, there is a section for 'New Description' with a text input field containing 'A hotlist catered solely to Cameron Abbott.' Below that, there is a section for 'Private' with a checked radio button. Below that, there is a section for 'Select Position on Hotlist' with two radio buttons: 'Add to top of list' (selected) and 'Add to bottom of list'. At the bottom of the form, there are three buttons: 'SAVE AS DRAFT', 'CANCEL', and 'SUBMIT'.

Once the information has been entered, select "Submit" for the hotlist to be created and for it to appear within the "My Lists" tab.

Add Employees, Customers, or Contacts to an Existing Hotlist

Once you have created the hotlist you can add employees, customers, or contacts to a hotlist at any time from either a search result, or from within the specific record via the "Add to Hotlist" charm.

Adding from Search Results:

The screenshot shows a search results page with a filter bar at the top. The filter bar has two tabs: 'BASIC' and 'ADVANCED'. Under 'BASIC', there are fields for 'Last Name' (Abbott), 'First Name' (C), 'Employee Id', and 'Government Id'. Under 'ADVANCED', there are fields for 'Assigned' (Either), 'Status' (Active), 'Branch' (All), and 'Service Representative' (All). There are 'RESET' and 'SEARCH' buttons. Below the filter bar, it says 'Search returned 92 results'. A dropdown menu is open, showing '3 selected employees' with a red box around it. The dropdown menu has several options: 'Email', 'Log Message for 3 Recipients', 'Make Candidates', 'Make Job Offers', 'Assign', 'Add to Hotlist' (highlighted with a red box), 'Merge Record', 'Text 3 Employees', and 'Onboarding'. Below the dropdown menu, there is a table with columns: 'Name', 'Branch', 'Is Active', 'Is Assigned', 'Last Message', 'Zip Code', 'Resume on file', 'Phone', and 'Cell'. The table contains several rows of data, with the first row highlighted in grey.

Name	Branch	Is Active	Is Assigned	Last Message	Zip Code	Resume on file	Phone	Cell
on	High Tech NE	✓	✗	ZipWhip	11223	✗		65
on	High Tech NE	✓	✗			✗		
on	High Tech NE	✓	✗			✗		
on	High Tech NE	✓	✗			✗		
on	High Tech NE	✓	✗			✗		
on	High Tech NE	✓	✗			✗		
on	High Tech NE	✓	✗			✗		
on	High Tech NE	✓	✗			✗		
on	High Tech NE	✓	✗			✗		
on	High Tech NE	✓	✗			✗		

Adding via the "Add to Hotlist" Charm:

The screenshot shows an employee profile page for Cameron Abbott (4295152687). The top bar has a navigation menu with items: 'Active', 'Add to Hotlist' (highlighted with a red box), 'Reports', 'Assignments', 'E-Pay', 'ACA', 'Web User', 'Interviews', 'Onboarding', 'E-Verify', 'Sync To Sense', 'Tasks', 'Alerts', 'Bookmark', and 'More'. Below the navigation menu, there is a 'Snapshot' section with a table containing the following data:

Id	Hire Status
4295152687	Eligible for Hire >

Both options will open the "Add to Hotlist" window where you will select the intended hotlist from the "Existing Hotlist" dropdown:

Add to Hotlist

Select an existing hotlist from the dropdown or create a new one.

* Existing Hotlists

Employee Hotlist

✕ ▼

or

New List Name

New Description

Private

Select Position on Hotlist

☒ Add to top of list

☐ Add to bottom of list

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Note The hotlists that appear within this dropdown include:

- Your hotlists that pertain to the specific record type.
- Other users' hotlists that have been made "Public" that pertain to the specific record type.
- All "Private" hotlists as long as you have the security permission to view other users' "Private" hotlists.

Once the hotlist has been selected, you will have the option to choose where the records will display within the hotlist via the "Select Position on Hotlist" section:

Add to Hotlist

Select an existing hotlist from the dropdown or create a new one.

Existing Hotlists

Employee Hotlist

×

▼

or

New List Name

New Description

Private

Select Position on Hotlist

☒ Add to top of list
 ☐ Add to bottom of list

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CANCEL

SUBMIT

Once the intended hotlist has been selected from the dropdown, and the position of the records has been chosen, select "Submit" to add the records to the hotlist.

Note Records that are visible within any given hotlist are dependant on what the user can view within their hierarchy.

Searching for Hotlists

To locate the hotlist you wish to utilize, navigate to B Menu > Hotlists.

You can then search for your desired hot list by using the available search and filter options:

- List Name or
- List Description
- List Type (All, Static List, Saved Search)

List Name

List Description

List Type

All

▼

MY LISTS

ALL LISTS

Employees

116

+

Customers

63

+

Contacts

28

+

Note By default, the List Type will be set to "All" (including both hotlists and saved searches):

- The ">" symbol signifies a hotlist.
- The magnifying glass symbol signifies a saved search.

You can also filter between viewing your lists or viewing all lists. Viewing all lists includes the following:

- All hotlists that have been made public.
- Hotlists that were made private by the original user, but you have the associated permission to view them.

List Name	List Description	List Type
		All
MY LISTS		ALL LISTS
Employees 118		+
Customers 63		+
Contacts 28		+

Editing or Deleting a Hotlist


Hotlists can be edited or deleted by navigating to B Menu > Hotlists.

To **edit** a hotlist, select the hotlist from the record type dropdowns and select the pencil icon to the right of the hotlist details:

List Name	List Description	List Type
		All
MY LISTS		ALL LISTS
Employees 1		+
> Employee Hotlist Owned by joshua.kramer	Hotlist containing employee records.	Last Updated 1/25/2023 ⋮
Customers 0		+
Contacts 0		+

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Employee Hotlist0 Total Records
Hotlist containing employee records.

To **delete** a hotlist, select the  icon to the right of the hotlist within record type dropdowns and select "Delete":

List Name

List Description

List Type

All

MY LISTS

ALL LISTS

Employees 1

Employee Hotlist

Owned by joshua.kramer

Hotlist containing employee records.

Last Updated

1/25/2023

Rows per page: 20

1 of 1

Delete

Select "Confirm" within the prompt to delete the hotlist:

Confirm Delete


Are you sure you would like to delete **Employee Hotlist**?


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Note If you have access to view "Private" hotlists from other users, you will also have the ability to delete those hotlists.

Functionality Available Within a Hotlist

Within the hotlists, different functionality is available for employees, customers, and contacts.

Note You can export any type of hotlist by navigating to B Menu > Hotlists > Select a hotlist that contains records > Select the  icon to the right of the hotlist records:

← BACK TO HOTLISTS									
Contact Hotlist 3 Total Records Contact Hotlist									
<div>  </div>									
Drag a column header here to group by that column									
<input type="checkbox"/>	Position	Active	Contact Id	Name	Customer Name	Department Name	Title	Office Phone	Email
<input type="checkbox"/>	1	☑	2489	Alaska, Jimmy	123 Nursing	Primary	Mr.	(651) 230-9932	⋮
<input type="checkbox"/>	2	☒	2564	Cricket, Jimmeny	123 Nursing	123zz			⋮
<input type="checkbox"/>	3	☒	2995	Doe, John	123 Nursing	Primary	Stainer	(555) 555-3486	⋮
Rows per page: 20 1/3 of 3 < 1 >									

By selecting the "Export" option, you will be able to select whether you want the list in Excel or CSV format.

Employee Hotlist Functionality

Navigate to B Menu > Hotlists > Select a hotlist that contains records.

Select multiple records from the hotlist and select the "# Selected Items" dropdown for the following options:

- Text Employees (if a texting integration is enabled and you have texting credentials setup)
- Email
- Log Message
- Make Candidates
- Make Job Offers
- Assign
- Edit Hotlist Members

The screenshot shows the 'All Employees who want to go to ABC Co.' hotlist with 10 total records. A dropdown menu is open, showing 3 selected items. The menu options are: Text 3 Employees, Email, Log Message for 3 Recipients, Make Candidates, Make Job Offers, Assign, and Edit Hotlist Members. The table below shows the first three records, all of which are selected.

Assigned	Employee Id	Name	Hotlist Step	Hotlist Note	Phone Number	Email	Last Message	La
☑	11971	Barker, Roberto					Jan 23, 2023 7:07	⋮
☑	5049	Barker, Shannon					Jan 23, 2023 7:07	⋮
☑	5414	Beach, Tracy					Jan 23, 2023 7:07	⋮

Additionally, you can select the  icon to the right of the record within the hotlist for the following options:

- Edit
- Remove

The screenshot shows the 'Accountants' hotlist with 18 total records. A dropdown menu is open for the first record, showing 1 selected item. The menu options are: Edit and Remove. The table below shows the first four records, with the first record selected.

Position	Active	Assigned	Employee Id	Name	Hotlist Step	Hotlist Note	Phone Number	Email	Last Message	La
1	☑	☑	5414	Beach, Tracy					Jan 23, 2023 7:07	⋮
2	☑	☑	5755	Brown, Sherry					Jan 23, 2023 7:07	⋮
3	☑	☑	5759	Aardson, Steve					Jan 23, 2023 7:07	⋮
4	☒	☒	12866	White, Terrence					Sep 13, 2016 8:17	⋮

By selecting "Edit", the "Edit Hotlist Member" window will open with the following options:

- **Hotlist Step:** This column allows you to track the status of an employee in relation to this specific hot list. This is not correlated to a candidate status (tied to an order) nor is it logged, or visible, on the employee's record.
- **Hotlist Note:** A note for the record of the hotlist.
- **Hotlist Position:** The position the record will appear within the hotlist.

By selecting "Remove", you can select "Confirm" within the prompt to remove the record from the hotlist:

Customer Hot List Functionality

Navigate to B Menu > Hotlists > Select a hotlist that contains records.

Select multiple records from the hotlist and select the "# Selected Items" dropdown for the following options:

- Log Message

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2013 Prospects

15 Total Records
hot list fo customers

3 selected items

Clear Selection

Log Message for 3 Recipients >

column

<input type="checkbox"/>	Position	Customer Id	Customer Name	Department Name	Office Phone	Last Message	Notes	
<input type="checkbox"/>	1	778929	ASCS, Inc.	Primary	(651) 736-9736 ext. 123	Apr 25, 2008 5:27 PM	New Construction Cleaning Business Needs cleaning peop...	⋮
<input type="checkbox"/>	2	778967	Ames Construction, Inc.	Primary	(651) 878-9878 ext. 123	Dec 21, 2018 6:25 PM		⋮
<input type="checkbox"/>	3	778933	Barry's Dome Dogs	Primary	(651) 738-9738 ext. 123	Oct 4, 2013 8:20 PM	Food vendor for the Metrodome in Minneapolis, MN autod...	⋮
<input type="checkbox"/>	4	778977	Anderson Consulting	Primary	(651) 909-9909 ext. 123	Feb 27, 2009 1:38 PM	Test Note autodeact:01/21/15	⋮
<input type="checkbox"/>	5	778990	ABC 123	Primary	(651) 577-1577 ext. 123	Jul 29, 2014 6:49 PM		⋮
<input checked="" type="checkbox"/>	6	779071	Best Buy	Primary	(651) 575-0575 ext. 123	Aug 15, 2013 1:17 PM	autodeact:01/21/15	⋮
<input checked="" type="checkbox"/>	7	779088	Excel Energy	Corporate Office	(651) 759-0759 ext. 123	Dec 21, 2018 7:54 PM	Largest scaffolding rental company in south Florida	⋮
<input checked="" type="checkbox"/>	8	779126	Creative Intentions Inc	Primary	(651) 452-9786	Jun 28, 2010 4:22 PM	IT Consulting company autodeact:01/21/15	⋮

Additionally, you can select the icon to the right of the record within the hotlist for the following options:

- Edit
- Remove

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Customers

6 Total Records
My test customer list

1 selected item

Clear Selection

Drag a column header here to group by that column

<input type="checkbox"/>	Position	Customer Id	Customer Name	Department Name	Office Phone	Last Message	Notes	
<input type="checkbox"/>	1	4294969431	Tempworks Software	Primary		Feb 7, 2013 2:30 PM	autodeact:01/21/15	⋮
<input type="checkbox"/>	2	4294969452	Microsoft	Primary		Aug 29, 2019 1:49 PM	autodeact:01/21/15	⋮
<input checked="" type="checkbox"/>	3	4294969433	DC Comics	Primary		Jul 24, 2013 5:47 PM		⋮
<input type="checkbox"/>	4	779254	RSC Rental	Primary	(651) 105-2105 ext. 123	Feb 27, 2013 12:00 AM	Hottest!! autodeact:01/21/15	⋮
<input type="checkbox"/>	5	779071	Best Buy	Primary	(651) 575-0575 ext. 123	Aug 15, 2013 1:17 PM	autodeact:01/21/15	⋮
<input type="checkbox"/>	6	777956	ACME Auto Parts	Primary	(651) 731-6731 ext. 123	Jan 18, 2023 4:38 PM	autodeact:06/01/06	⋮

Edit

Remove

By selecting "Edit", the "Edit Hotlist Member" window will open with the following options:

- Note: A note for the record of the hotlist that will also update on the customer record.
- Hotlist Position: The position the record will appear within the hotlist.

Edit Hotlist Member

Note

* Hotlist Position

3

Enter a number between 1 and 6

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CANCEL

SUBMIT

By selecting "Remove", you can select "Confirm" within the prompt to remove the record from the hotlist:

Confirm Remove

Are you sure you would like to remove this member?

CANCEL

CONFIRM

Contact Hot List Functionality

Navigate to B Menu > Hotlists > Select a hotlist that contains records.

Select multiple records from the hotlist and select the "# Selected Items" dropdown for the following options:

- Email
- Log Message
- Text Contacts (if a texting integration is enabled and you have texting credentials setup)

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🔒

Contact Hotlist

3 Total Records

Contact Hotlist

3 selected items

Clear Selection

✉ Email

📄 Log Message for 3 Recipients >


📄 Text 3 Contacts

	Contact Id	Name	Customer Name	Department Name	Title	Office Phone	Email
<input checked="" type="checkbox"/>	1	Alaska, Jimmy	123 Nursing	Primary	Mr.	(651) 230-9932	
<input checked="" type="checkbox"/>	2	Cricket, Jimmeny	123 Nursing	123zz			
<input checked="" type="checkbox"/>	3	Doe, John	123 Nursing	Primary	Stalner	(555) 555-3486	

Rows per page: 20

1-3 of 3

< 1 >

Additionally, you can select the  icon to the right of the record within the hotlist for the following options:

- Edit

- Remove

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Contact Hotlist 3 Total Records
Contact Hotlist

1 selected item Clear Selection

Drag a column header here to group by that column

<input type="checkbox"/>	Position	Active	Contact Id	Name	Customer Name	Department Name	Title	Office Phone	Email
<input checked="" type="checkbox"/>	1	☑	2489	Alaska, Jimmy	123 Nursing	Primary	Mr.	(651) 230-9932	
<input type="checkbox"/>	2	☑	2564	Cricket, Jimmy	123 Nursing	123zz			
<input type="checkbox"/>	3	☑	2995	Doe, John	123 Nursing	Primary	Stainer	(555) 555-3486	

Edit Remove

By selecting "Edit", the "Edit Hotlist Member" window will open with the following options:

- Note: A note for the record of the hotlist that will also update on the contact record.
- Hotlist Position: The position the record will appear within the hotlist.

Edit Hotlist Member

Note

New Contact

* Hotlist Position

1

Enter a number between 1 and 3

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By selecting "Remove", you can select "Confirm" within the prompt to remove the record from the hotlist:

Confirm Remove

Are you sure you would like to remove this member?

CANCEL CONFIRM

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