

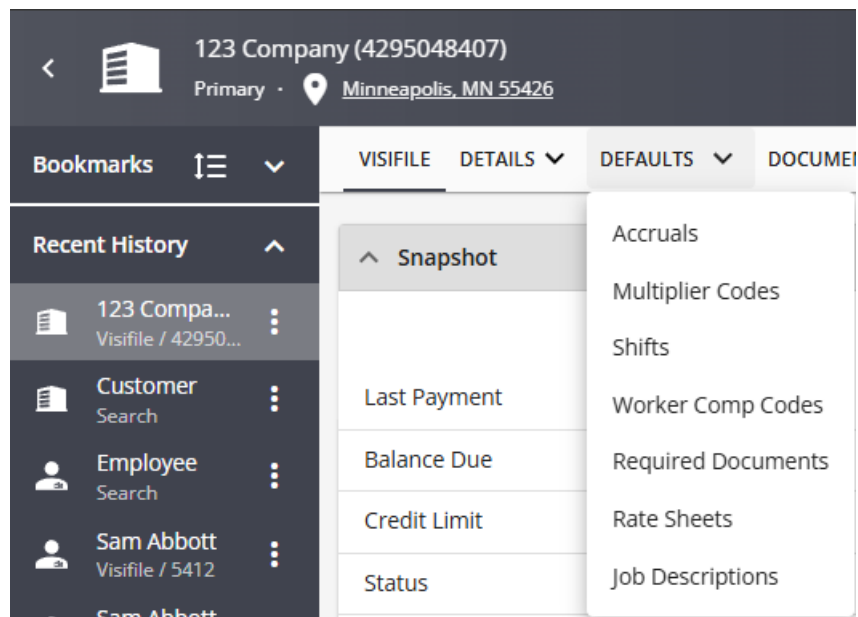
Beyond - Managing Customer Defaults

Last Modified on 09/18/2025 9:46 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.

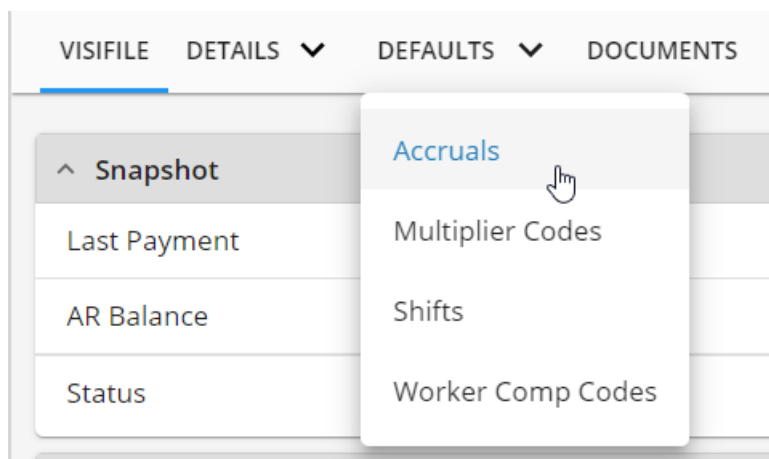
To find Customer Defaults, navigate to the Customer record and select the Defaults tab:



Accruals

Accruals refer to paid sick leave, vacation, PTO, etc. options that employees might be eligible for. You may have a few different accruals offered depending on where employees work, which customers they work for, etc. Accrual packages will need to be set up in administration and managed for each employee.

1. Navigate to the customer record
2. Select the arrow next to the Defaults tab and choose Accruals



3. Select the + Add Accruals button to add a new accrual package

VISIFILE
DETAILS
DEFAULTS
DOCUMENTS
INVOICE HISTORY
MORE

+ ADD ACCRUAL

No Accruals

4. Select the accrual package from the drop down

Add Customer Accrual

Name
Vacation Accrual

☒ Active
☐ Apply to Departments

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CANCEL
SUBMIT

- Accrual package names are set up by your administrator. Talk with your manager or admin if you are unsure of which package to choose
5. Optionally, if this customer has department records underneath it, you can choose to apply this accrual to departments as well
6. Select Submit

Note For more information on managing Customer accruals, please see the article titled [Beyond - Managing Accruals on the Customer, Worksite, and Assignment Records](#)

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 "+ Add Default Multiplier Code" button to open the "Add Multiplier Code" window:

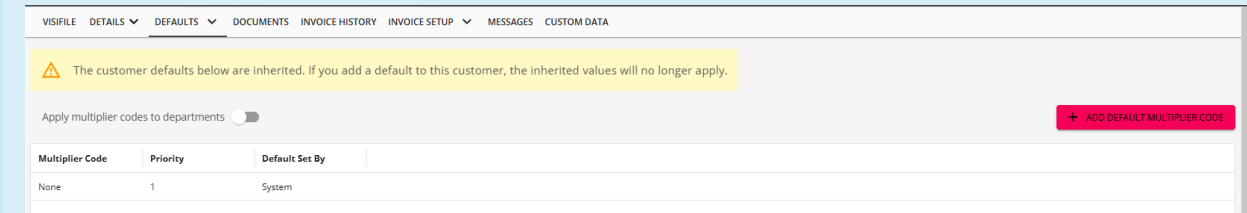
VISIFILE
DETAILS
DEFAULTS
DOCUMENTS
INVOICE HISTORY
INVOICE SETUP
MESSAGES
CUSTOM DATA

Apply multiplier codes to departments
+ ADD DEFAULT MULTIPLIER CODE

Multiplier Code	Priority	Default Set By	
1.5	1	This customer	⋮
1.3	2	This customer	⋮

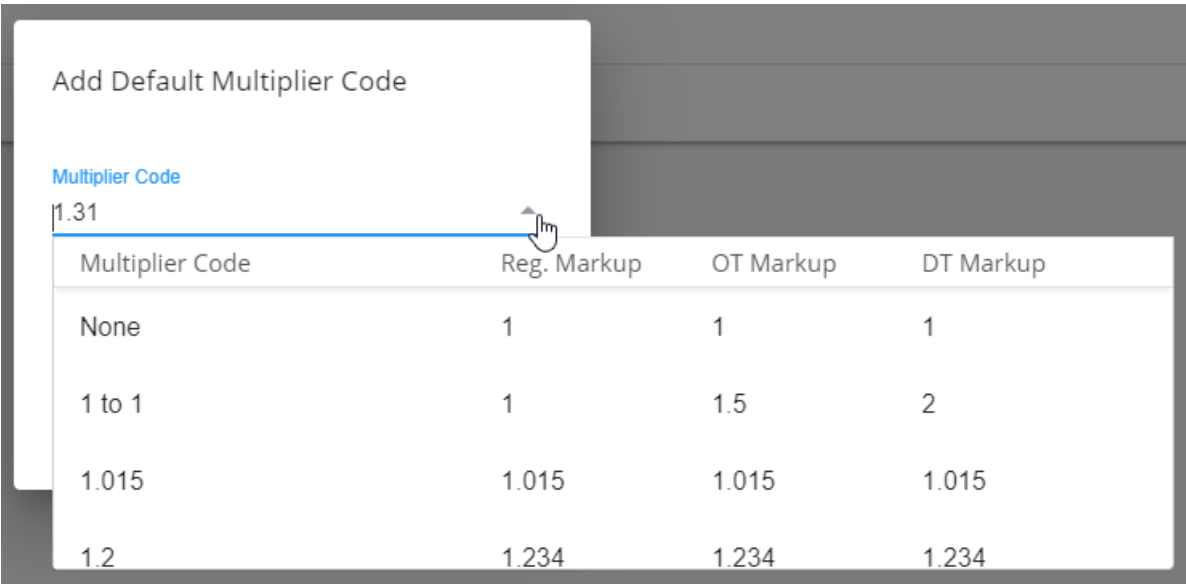
In the upper left-hand corner, the system highlights the section users are currently viewing. The following example below shows users are in the Customer> Defaults> Multiplier Codes.

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:



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

From the drop-down, select the matching code:



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.

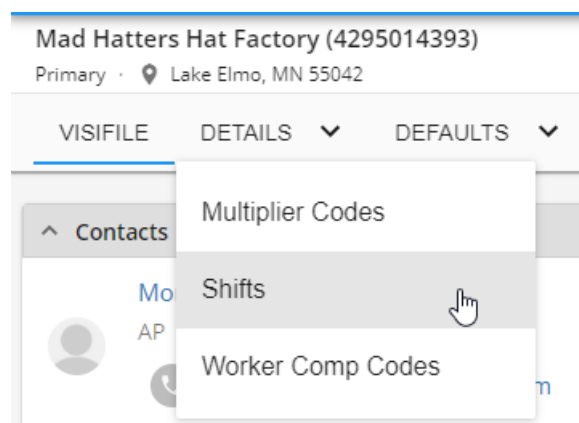
The priority is automatically assigned as the next available number, following a standard numerical order. Click "Submit" in the lower right to close the window and add the new multiplier code. Any/all saved codes will immediately display in the multiplier codes table.

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MESSAGES CUSTOM DATA			
Apply multiplier codes to departments <input type="checkbox"/>			+ ADD DEFAULT MULTIPLIER CODE
Multiplier Code	Priority	Default Set By	
1.31	1	This customer	⋮
1.3	2	This customer	⋮
1.5	3	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:

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MESSAGES CUSTOM DATA				
Apply shifts to departments <input type="checkbox"/>				+ ADD DEFAULT SHIFT
Shift	Start	End	Default Set By	
AM	7:00 AM	3:00 PM	This customer	⋮
PM	3:00 PM	10:00 PM	This customer	⋮

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

Add Default Shift

Shift Name

Graveyard

Start Time

10:00 PM

End Time

6:00 AM

Minutes of Break Per Day

30

☒ Mon ☐ Tue ☐ Wed ☐ Thu ☒ Fri

☒ Sat ☒ Sun

Notes


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- **Shift:** (Required) A free text field (10 character limit) used to name/briefly describe the shift.
- **Start Time:** (Required) When the shift begins. The time the employee is expected to arrive.
- **End Time:** (Required) When the shift ends. The time the employee can expect to be done with work.
- **Break Minutes:** The length of time a customer has allotted for employee breaks in minutes.
- **Days Worked:** The days of the week the employee is expected to report to work at the customer.
- **Notes:** Notes strictly related to the shift that may be helpful to save.
 - For example: "Crucial that employees are on time! They have a strict shift rollover schedule--3rd shift staff CANNOT punch out until 1st shift staff punches in!" Any notes entered display for reference only and do not appear elsewhere. They do not flow into orders, assignments, etc.

Click 'Submit' in the lower right to close the form and save the shift.

Select the  to the right of the shift to edit or remove a saved shift:

VISIFILE DETAILS DEFAULTS DOCUMENTS INVOICE HISTORY INVOICE SETUP MESSAGES CUSTOM DATA				
Apply shifts to departments <input type="checkbox"/>				+ ADD DEFAULT SHIFT
Shift	Start	End	Default Set By	
AM	7:00 AM	3:00 PM	This customer	
PM	3:00 PM	10:00 PM	This customer	

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:

worker

☒

Can edit customer default worker comp codes

Allows a user to create, edit, and delete customer default worker comp codes

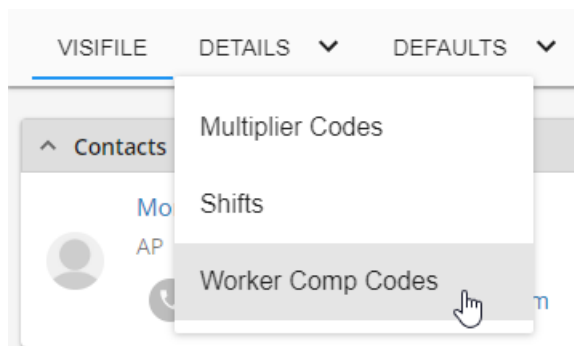
If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Worker Comp Codes" page within Customer > Defaults > Worker Comp Codes along with all associated fields and forms within the dropdowns to the Security Groups that require the functionality:

BY PAGE		BY FIELD	Selecting a parent selects children <input checked="" type="checkbox"/>	
worker comp				
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](#)".

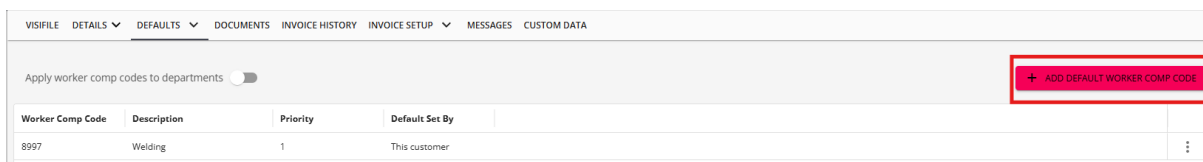
Setting up worker comp code defaults on the customer record allows you to set and rank the only available worker

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 "+ Add Default Worker Comp Code" button:



4. Choose the worker comp code and set a Priority

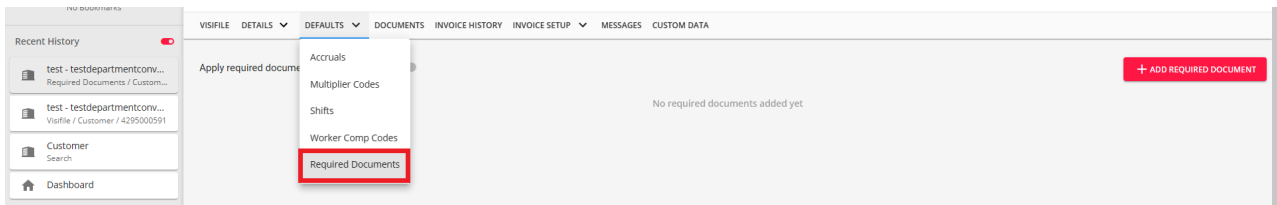
A screenshot of a form titled 'Add Default Worker Comp Code'. The form has two main input fields: 'Worker Comp Code' and 'Priority'. The 'Worker Comp Code' field is a dropdown menu with 'Food and Beverage' selected. The 'Priority' field is a text input with the value '1'. At the bottom of the form, there are three buttons: 'SAVE AS DRAFT', 'CANCEL', and 'SUBMIT'.

5. Select Submit

Required Documents

Required documents allow you to store, track, and manage documents that are required for employees.

Begin by navigating to the Customer record > Defaults > Required Documents:



Select the option for "+ Add Required Document" at the top right to open the window for adding a required document:

 A screenshot of a modal window titled 'Add Required Document'. It contains two dropdown menus: 'Category' with 'All Categories' selected, and 'Type' with 'Select type' selected. Below these is a section titled 'Documents (0)' which contains a large document icon with a plus sign and the text 'No documents added yet'. At the bottom right are 'CANCEL' and 'ADD' buttons.

Select the following:

- **Category:** The category of the Required Document Type.
- **Type:** The Required Document Type.

Note You are able to add more than one Required Document at a time. Continue to select the Required Documents from the "Type" dropdown and they will appear within the "Documents" list:

Add Required Document

Category

All Categories

Type




Select type

Documents (3)

*

OSP test

Drivers License



CANCEL

ADD

You can also remove a Required Document from the list by selecting the Trash Can icon to the right of the item:

Add Required Document

Category

All Categories

Type




Select type

Documents (3)

*

OSP test

Drivers License



CANCEL

ADD

Once all of the Required Documents have been added for the Customer, select "Add" at the bottom right:

Add Required Document

Category

All Categories

Type

Select type

Documents (3)

*

OSP test

Drivers License

CANCEL

ADD

You will now see the added Required Documents within the main list on the Customer record:

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MESSAGES CUSTOM DATA				
Apply required documents to departments <input type="checkbox"/>				+ ADD REQUIRED DOCUMENT
Type	Category	Notes	Required	
5 Panel Drug Test	Onboarding Document		✓	⋮
Drivers License			✓	⋮
OSHA			✓	⋮

Once the Required Documents have been added to the Customer record, you can do the following:

- Apply Required Documents to Customer Departments
- Edit
- Delete

Note For more information on setting up customer required documents, please see the article titled [Beyond - Customer Required Documents](#)

Rate Sheets

A rate sheet is a tool that can be used to set up permanent pay and/or bill rates for orders/assignments created for a specific employee, customer, job title, shift, worksite, or branch.

The rate sheet is a great option for users that *sign agreements with customers which have an agreed upon pay rate and bill rate*. For example, perhaps we agree that any time we place 12 Hour Nurse temps at 123 Nursing, the bill rate is \$45.00/hr and the pay rate is \$25.00/hr. I can assure that *every service rep will always* respect that agreement by

establishing a rate sheet.

With a rate sheet saved to the customer record, whenever an order is created for a 12 Hour Nurse temp at 123 Nursing, *viola!* our rate sheet is triggered, and the financial details automatically post fill into the order like magic!

Navigate to Customer > Defaults > Rate Sheets:

VISIFILEDETAILS▼DEFAULTS▼DOCUMENTSINVOICE HISTORYINVOICE SETUP▼MESSAGESCUSTOM DATA

Worksite

▼EmployeeJob TitleBranch▼Shift▼

+ ADD RATE SHEET

2 results

↓

	Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Code	Multiplier Code	Apply rate s...
+	Floyd's Farming	Primary		General Laborer	Sterling Archer			1.4	25	⋮
+	Floyd's Farming	Primary		Welder				None	25	⋮

Select "+ Add Rate Sheet":

VISIFILEDETAILS▼DEFAULTS▼DOCUMENTSINVOICE HISTORYINVOICE SETUP▼MESSAGESCUSTOM DATA

Worksite

▼EmployeeJob TitleBranch▼Shift▼

+ ADD RATE SHEET

0 results

↓

	Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Code	Multiplier Code	Apply rate s...
--	---------------	-----------------	----------	-----------	---------------	--------	------------	------------------	-----------------	-----------------

Complete the form and select "Submit" to create the Rate Sheet:

Add Rate Sheet

Criteria

Employee

Any

Job Title

12 hour Nurse

Customer

123 Nursing - Primary

Shift

Evening

Worksite

Any

Branch

Any

☒ Apply rate sheet to departments

Rates

i

Rates will populate Financials on newly created matching Job Orders and Assignments.

* Multiplier Code

None

* Overtime Factor

1.5

Pay Rate

28.00

Bill Rate

48.00

Overtime Pay Rate

42.00

Overtime Bill Rate

72.00

Doubletime Pay Rate

56.00

Doubletime Bill Rate

96.00

Unit Pay Rate

0.00

Unit Bill Rate

0.00

Other Agency Pay

0.00

Worker Comp Code

Estimated Margin

11 67%

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Selecting the drop down to the left of the Rate Sheet will also expand it's details:

3 results

	Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Code	Multiplier Code	Apply rate s...	
—	123 Nursing	Primary		12 hour Nurse			Morning		None		⋮
Rate Sheet Detail											
Pay Rate				Overtime Pay Rate							
25.00				37.50							
Doubletime Pay Rate				Unit Pay Rate							
50.00				0.00							
Other Agency Pay				Bill Rate							
0.00				45.00							
Overtime Bill Rate				Doubletime Bill Rate							
67.50				90.00							
Unit Bill Rate				Overtime Factor							
0.00				1.5							
Doubletime Factor				Gross profit percent							
2				44.44%							

Note For more information on creating and managing rate sheets, please see the article titled [Beyond - How to Create and Utilize Rate Sheets](#).

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:

BY PAGE		BY FIELD	Selecting a parent selects children <input checked="" type="checkbox"/>	
🔍 job desc		✕		
^ Customer			<input checked="" type="checkbox"/>	Access
^ Defaults				
^ Job Descriptions	Page		<input checked="" type="checkbox"/>	Access
^ Add Job Description	Form		<input checked="" type="checkbox"/>	Access
Job Title	Field		<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write
Public Job Title	Field		<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write
Job Description	Field		<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write
Public Job Description	Field		<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write
Education Summary	Field		<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write

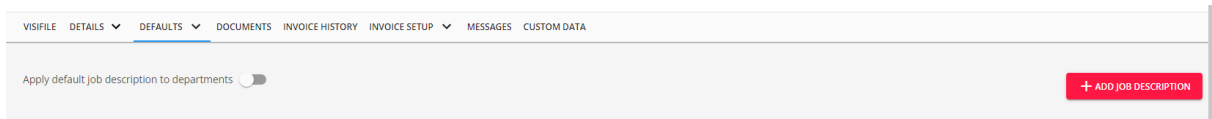
For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

To add a default job description:

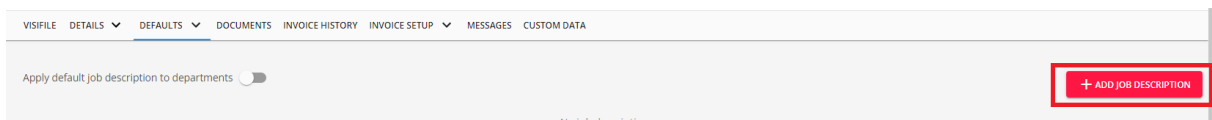
1. Navigate to the customer you want to add a default job description for:



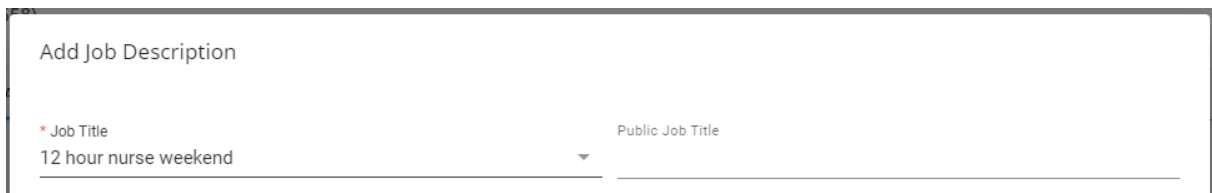
2. Select Defaults > Job Descriptions to navigate to the "Job Descriptions" page:



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:



5. Enter the Job Description:



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
12 hour nurse weekend

Public Job Title

* 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

- 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
12 hour nurse weekend

Public Job Title

* 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

SAVE AS DRAFT CANCEL SUBMIT

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":

Apply default job description to departments ☐

+ ADD JOB DESCRIPTION

Job Title	Public Job Title	Job Description	Public Job Description	Education Summary	Experience Summary	
HC 12 hour Nurse		This is a job for nurses working 12 hour shifts ov...				⋮
Welder		Reviewing blueprints Cutting metal into the appr...	Reviewing blueprints Cutting metal into the appr...			⋮

Edit
Delete

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:

Apply default job description to departments ☒

+ ADD JOB DESCRIPTION

Job Title	Public Job Title	Job Description	Public Job Description	Education Summary	Experience Summary	
HC 12 hour Nurse		This is a job for nurses working 12 hour shifts ov...				⋮
Welder		Reviewing blueprints Cutting metal into the appr...	Reviewing blueprints Cutting metal into the appr...			⋮

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:

⚠ The customer defaults below are inherited. If you add a default to this customer, the inherited values will no longer apply.

Apply default job description to departments ☐

+ ADD JOB DESCRIPTION

Job Title	Public Job Title	Job Description	Public Job Description	Education Summary	Experience Summary	
HC 12 hour Nurse		This is a job for nurses working 12 hour shifts ov...				⋮
Welder		Reviewing blueprints Cutting metal into the appr...	Reviewing blueprints Cutting metal into the appr...			⋮

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:

VISIFILE DETAILS CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA ASSIGNMENTS

Snapshot

Messages

Assignments

Contact Roles

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

VISIFILE **DETAILS** CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA ASSIGNMENTS

Customer Information

Job Information

SUN	MON	TUE	WED	THU	FRI	SAT
Job Title Unknown			Job Order Type Temp			
Positions Required 1			Positions Filled 27			
Start Date 12/11/2019			Estimated End Date 12/11/2020			
Shift --			Job Order Duration Indef			
Start Time --			End Time --			
Job Description --			Dress Code --			
Safety Notes --			Shift Notes --			

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