

Beyond - Record Types

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Record Types in Beyond

There are six types of records in Beyond. This article discusses each type of record, record statuses (active versus inactive) and the components you will find in common with each record type (visifile, details, messages, etc.).

- **Record Types:**
 - [Employee](#)
 - [Prospect](#)
 - [Customer](#)
 - [Contact](#)
 - [Order](#)
 - [Assignment](#)
- [Record Statuses](#)
- [Common Record Tabs](#)

Employee Records

Employee records can be for current, past, or potential employees (applicants).

The screenshot displays the 'EMPLOYEE' record for Christopher Robin. The header bar is blue and contains the name 'Christopher Robin' and a profile icon. Below the header, a navigation bar lists various tabs: VISIFILE, DETAILS, DOCUMENTS, MESSAGES, JOB MATCHING, ASSIGNMENTS, STORY, REFERENCES, PAY SETUP, ONBOARDING, PAY HISTORY, and CUSTOM DATA. The main content area is divided into sections: 'Snapshot' showing ID 4295097670 and Hire Status 'Eligible for Hire'; 'Contact Information' with email and phone details; and expandable sections for 'Note', 'Messages', and 'Resume'. Each section has a red '+' icon for expansion.

Within each employee record you have the ability to store all kinds of information and details such as the employee's contact information, resume, and even their preferences on how they want to be paid. The more information you store in an employee record, the more complete their profile and the easier your life will be when you need to find this information later.

Training Tip: Logging your interactions with employees can be extremely helpful for searching and documentation purposes. Check out [Beyond - Message Logging](#) for more information.

To Learn More:

- [Beyond - How to Create an Employee Record](#)
- [Beyond - Washed Status](#)
- [Beyond - Onboarding](#)
- [Beyond - Employee Frequently Asked Questions](#)

Prospect Records

Prospect records allow your sales team to quickly document potential new sales leads. You can track contacts associated with the potential customer and any interactions or information you gather about them.

Note For new TempWorks clients as of 8/11/2023, Prospect functionality will be **disabled**. In the event you would like for this functionality to be enabled, please contact [TempWorks Support](#).

Existing TempWorks clients prior to 8/11/2023 will continue to have access to this functionality. In the event you would like for this functionality to be disabled, and for your existing Prospect records to be converted to Customer records in mass, please contact [TempWorks Support](#).

PROSPECT

AJ Lawncare

AJ Lawncare (23)

St Paul, MN 55121

info@ajlawncare.xom

CONVERT

TASKS

BOOKMARK

MORE

VISIFILE

DETAILS

DOCUMENTS

MESSAGES

CUSTOM DATA

^ Snapshot

Name

AJ Lawncare

Department

--

Status

New

Source

conference

Phone Number

(456) 789-4451

Email Address

info@ajlawncare.xom

Address

123 Green Meadow BLVD

St Paul, MN 55121

United States of America

Notes

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^ Messages

^ Contacts

Ron Dunn - Parks Manager

(555) 444-3333

Dunn.R@eagleton.com

^ Documents

Trainer Tip: Once a sales lead turns into a sale, you can convert the information you've entered for a prospect into a full customer record. Check out [Beyond - Converting a Prospect to a Customer Record](#) for more information

To Learn More:

- Beyond - How to Create a Prospect Record

Customer Records

The customer record is where you will document sales activity and interactions with your current, previous, and future customers.

CUSTOMER - Old Ed's Soda Shop - Primary

Old Ed's Soda Shop (4295000617)

Primary · Minneapolis, MN 55121

ACTIVE

ONBOARDING

REPORTS

TASKS

BOOKMARK

MORE

VISIFILE

DETAILS

DEFAULTS

DOCUMENTS

INVOICE HISTORY

INVOICE SETUP

MESSAGES

CUSTOM DATA

Snapshot

ACCOUNT VIEW

MASTER VIEW

Last Payment --	YTD Sales 0.00
Balance Due 153,529.20	AR Balance 153,529.20
Credit Limit 0.00	Lifetime Sales 46,855.20
Status Active >	Sales Trailing 0.00

Note

Addresses

Contacts

Contact Information

Messages

Unfilled Job Orders

Assignments

This record also houses important billing information for the customer including billing preferences, worksite addresses, and other customer defaults.

Trainer Tip: The more you document, the more you can search and report on. Check out [Beyond - Message Logging](#), [Beyond - Documents](#), and [Beyond - Customer Defaults](#) for more tips on saving important information.

To Learn More:

- [Beyond - How to Create a Customer Record](#)
- [Beyond - Customer Defaults](#)
- [Beyond - Managing Sales and Service](#)
- [Beyond - Customer Frequently Asked Questions](#)

Contact Records

Who answers the phone when you call up your customers? Who are the hiring managers coming to you with new orders to fill? Who are the gatekeepers making it tricky to reach your intended recipient of e-mails and phone calls? These are your contacts, and you'll want to keep track of each one - past, present, and future.

CONTACT Vance Adler, Old Ed's Soda Shop

Adler, Vance (13940)
Supervisor · Minneapolis, MN 55121

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VISIFILE DETAILS DOCUMENTS MESSAGES CUSTOM DATA

Snapshot

Title Supervisor	Customer Old Ed's Soda Shop - Primary
Branch High Tech NE	Company
Status Active >	

Note

No note available

Contact Information

vance@oldedsoda.xom Email	
(456) 789-1111 Office Phone	

Use the fields on the contact record to store notes on all of your interactions, sales leads, and future opportunities.

Trainer Tip: Contacts may include hiring managers, supervisors, receptionists, and even members of the C-Suite!

To Learn More:

- [Beyond - Creating a Contact Record](#)
- [Beyond - Contact Roles](#)

Order Records

The order record tells your recruiters about the positions that need to be filled. Here you will enter information like job title, job description, pay rate, bill rate, and how many resources are needed.

JOB ORDER Old Ed's Soda Shop, Customer Service Rep.

Old Ed's Soda Shop - Primary (4295035815)
Customer Service Rep.: 6 of 3 positions filled

ACTIVE REPORTS TASKS COPY ORDER BOOKMARK MORE

VISIFILE DETAILS CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA ASSIGNMENTS

Snapshot

Customer Old Ed's Soda Shop - Primary	Job Title Customer Service Rep.
Job Order Id 4295035815	Branch High Tech NE
Pay Rate 15.00	Bill Rate 24.00
Status Filled >	Date Opened 8/5/2019
Job Order Duration Indef	Supervisor Ed, Old
Supervisor Office Phone (456) 825-1230	

Messages




Trainer tip: Use the candidates tab to keep track of employees that you are considering for an open position. You can use the candidate statuses to see where in the interview/hiring process they are. Check out [Beyond - The Candidates Tab](#) for more information.

To Learn More:

- [Beyond - How to Create an Order](#)
- [Beyond - Job Order Status and Searching](#)
- [Beyond - The Candidates Tab](#)

Assignment Records

When an employee is assigned to a job order, an assignment record is created to track their employment and financial information. Logging messages on the assignment record will link to the employee and order related.

ASSIGNMENT Assignment (4302361160)											
 Christopher A Robin (4302361160) 100 Acre Woods, Inc. 2 · Forklift	<div><div>ACTIVE</div><div>REPORTS</div><div>ONBOARDING</div><div>TASKS</div><div>SEND EMAIL</div><div>BOOKMARK</div><div>MORE</div></div>										
VISIFILE	DETAILS  MESSAGES CUSTOM DATA 										
<div><div>^ Snapshot</div><table><tr><td>Assignment Id 4302361160</td><td>Status Open ></td></tr><tr><td>Employee Id 4295097670</td><td>Job Order Id 4295036209</td></tr><tr><td>Branch High Tech NE</td><td>Temp Phone --</td></tr><tr><td>Pay Rate 16.00</td><td>Bill Rate 28.00</td></tr><tr><td colspan="2">Employer High Tech & Staffing Services, Inc</td></tr></table></div>		Assignment Id 4302361160	Status Open >	Employee Id 4295097670	Job Order Id 4295036209	Branch High Tech NE	Temp Phone --	Pay Rate 16.00	Bill Rate 28.00	Employer High Tech & Staffing Services, Inc	
Assignment Id 4302361160	Status Open >										
Employee Id 4295097670	Job Order Id 4295036209										
Branch High Tech NE	Temp Phone --										
Pay Rate 16.00	Bill Rate 28.00										
Employer High Tech & Staffing Services, Inc											
<div><div>^ Messages</div><div>No messages</div></div>											

Any relevant information from the order including pay/bill rates, worksite, and job title are automatically pre-filled on the assignment so the more detail you have on the order, the less you need to add or change on the assignment.

Trainer tip: Any changes made to the assignment record (i.e. bill rate and pay rate) will affect the timecards generated for that assignment in the future.

To Learn More:


- [Beyond - How to Create an Assignment](#)
- [Beyond - Assignment Details](#)
- [Beyond - Assignment Restrictions](#)

Record Statuses

Active Records vs Inactive Records


You can tell the record status by looking at the active charm on any record. It's located either to the left or under the record name, depending on your screen size.

EMPLOYEE Christopher Robin



Christopher Robin (4295097670)

SSN: 121-44-5132 · City, MN 55125



ACTIVE

A green light indicates that the record is active, while grey indicates the record is inactive.

- **Active** records are employees, customers, job orders, etc. that you are currently working with or are currently in progress.
- **Inactive** records are records you are ready to archive - for example, an employee who was hired full time for one of your customers or a customer that went out of business. It's nice to have these records incase you need them later, but you don't necessarily want them popping up in your regular searches.

You can always reactive an inactive record or search and review inactive records at any time.

Additional Statuses

Some record types have additional statuses to help better define where in your processes this record is. For example, a customer record has a status for you to indicate whether a customer is waiting a credit check or on hold for payment reasons. Employee records have hiring statuses so you can see whether they are ready to be hired yet.

EMPLOYEE Christopher Robin

Christopher Robin (4295097670)

SSN: 121-44-5132 · City, MN 55125

ACTIVE

ACA

WEB USER

E-VERIFY

ONBOARDING

TASKS

E-PAY

BACKGROUND

ASSIGNMENTS

CREATE RESUME

MERGE RECORD

REPORTS

INTERVIEWS

BOOKMARK

MORE

VISIFILE

DETAILS

DOCUMENTS

MESSAGES

JOB MATCHING

ASSIGNMENTS

STORY

REFERENCES

PAY SETUP

ONBOARDING

PAY HISTORY

CUSTOM DATA

Snapshot

Id

4295097670

Hire Status

Eligible for Hire >

Job Title

--

Trainer Tip: Status updates can come with a long checklist of to-dos, check out [Beyond - Status Change Workflows](#) to see how this feature can help streamline your processes.

To Learn More:

- [Beyond - Washed Status](#)
- [Beyond - Job Order Status and Searching](#)

Common Tabs within a Record

The following tabs are found on most record types in the system.

The Visifile

The visifile will give you an overview, or a snapshot, of the information on that record like status, contact information, and the history of messages logged here.

Check out [Beyond - Documents](#) for more information.

Messages

Messages allow you document and categorize different interactions and information related to the record. This tab will include a searchable history of all messages logged and the option to create a new message.

The screenshot shows the 'Messages' tab for employee Christopher Robin (4295097670). The interface includes a top navigation bar with various icons for employee management. Below the navigation bar, there's a search filter 'Filter by message text...' and a list of 17 messages. The messages are categorized by date, with 'MAY 2020' visible. Two messages are shown: 'Friday Check' (May 29th, 2:51 PM) and 'Buzz Offered' (May 22nd, 8:51 AM). The 'Friday Check' message states: 'Called and talked to Chris. He is still enjoying working for 100 Acre Woods Factory.' The 'Buzz Offered' message states: 'The employee Robin, Christopher has been offered a Job - Customer Service Rep. for OrderId: 4295035815'. The interface also shows a 'DATE' filter set to '12/12/2022' and a 'SORT BY' dropdown set to 'Date Created' with a 'DESC' sort order.

Check out [Beyond - Message Logging](#) for more information.

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