

# Beyond - Record Types

Last Modified on 04/17/2025 3:25 pm CDT

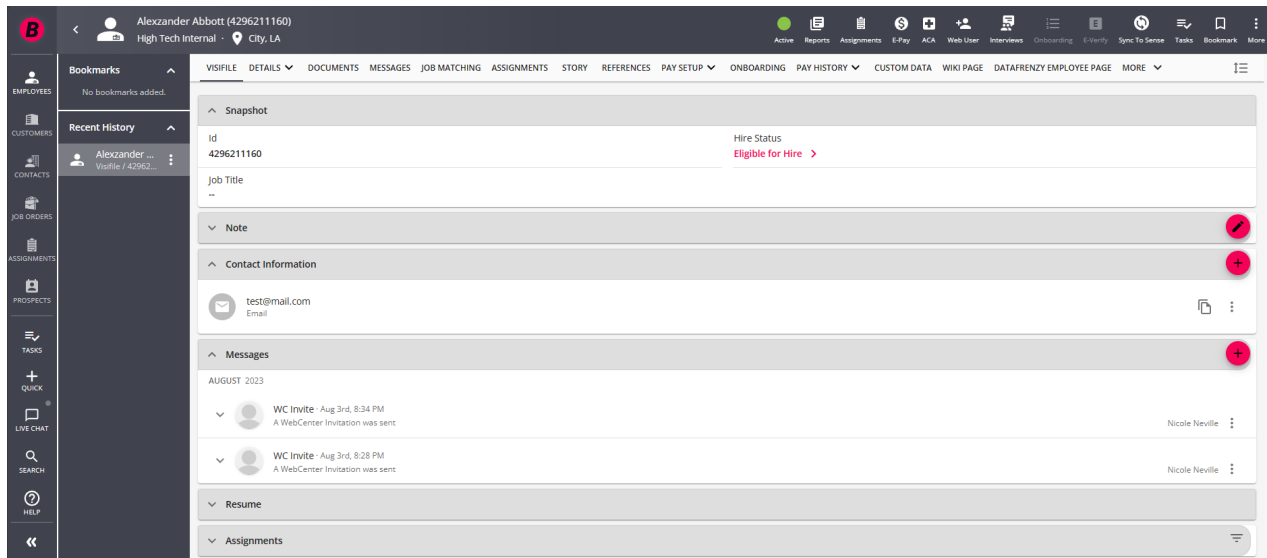
## Record Types in Beyond

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).



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:

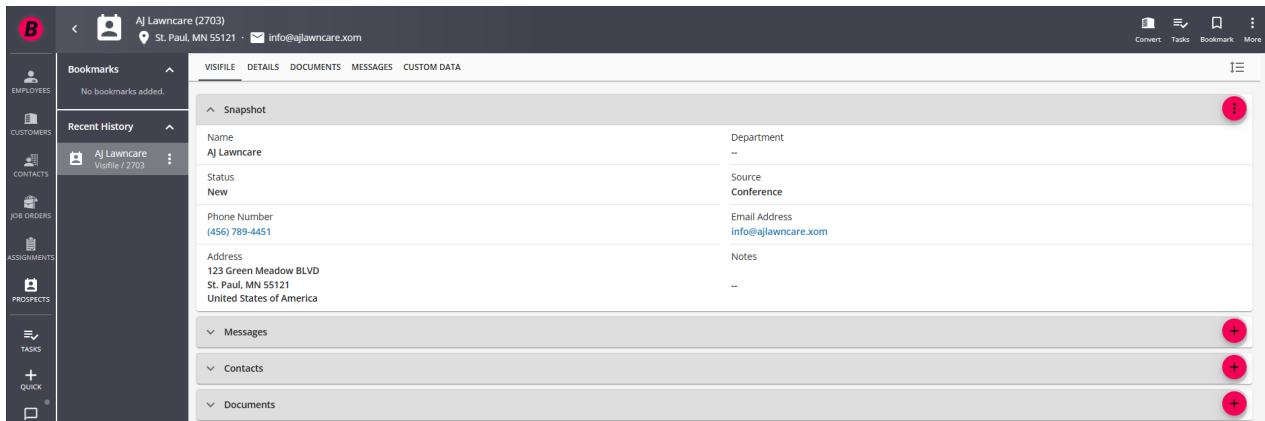
- [Beyond - How to Create an Employee Record](#)
- [Beyond - Washed Status](#)
- [Beyond - Onboarding](#)
- [Beyond - Employee Frequently Asked Questions](#)

## 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](#).



**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.

The screenshot displays the 'Customer Record' for 'Krustys Cookies (4296216998)' in the 'Primary' location at 'Denver, MN 55555'. The interface includes a top navigation bar with icons for Active, Reports, Onboarding, Tasks, Sync To Send, Change Parent, Bookmark, and More. A left sidebar contains navigation options: EMPLOYEES, CUSTOMERS, CONTACTS, JOB ORDERS, ASSIGNMENTS, PROSPECTS, TASKS, QUICK, LIVE CHAT, SEARCH, and HELP. The main content area is divided into 'Bookmarks' (No bookmarks added), 'Recent History' (Krustys Cookies / 42962), and a 'Snapshot' section. The 'Snapshot' section is split into 'ACCOUNT VIEW' and 'MASTER VIEW'. The 'ACCOUNT VIEW' table lists financial and operational data:

ACCOUNT VIEW	
Last Payment	YTD Sales
--	0.00
Balance Due	AR Balance
0.00	0.00
Credit Limit	Lifetime Sales
0.00	0.00
Status	Sales Trailing
Active >	0.00

Below the table is a 'Gross Profit Calculator >' link. The 'MASTER VIEW' section contains expandable sections for Note, Addresses, Contacts, Contact Information, Messages, Unfilled Job Orders, and Assignments, each with a corresponding icon (pencil, exclamation mark, plus, or double plus) on the right.

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.

Lee, Jan (13691)  
Manager · Minneapolis, MN 55122

Active Reports Web User Tasks Sync To Sense Bookmark More

Bookmarks  
No bookmarks added.

Recent History  
Jan Lee (jack...  
Visifile / 13691

EMPLOYEES  
CUSTOMERS  
CONTACTS  
JOB ORDERS  
ASSIGNMENTS  
PROSPECTS  
TASKS  
QUICK  
LIVE CHAT  
SEARCH

VISIFILE DETAILS DOCUMENTS MESSAGES CUSTOM DATA

Snapshot

Title  
Manager

Branch  
High Tech SE

Status  
Prospect

Note

Contact Information

jan@example.com  
Email

(612) 555-4411  
Office Phone

Messages

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.

Buy More - SubDepartment 4295046066  
Weekly Worker: 0 of 3 positions filled

Active Reports Unfilled Tasks Sync To Sense Bookmark More

Bookmarks  
No bookmarks added.

Recent History  
Buy More, ...  
Visifile / 42950...

EMPLOYEES  
CUSTOMERS  
CONTACTS  
JOB ORDERS  
ASSIGNMENTS  
PROSPECTS  
TASKS  
QUICK  
LIVE CHAT  
SEARCH  
HELP

VISIFILE DETAILS CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA ASSIGNMENTS DATAFREZY JOB ORDER PAGE

Snapshot

Customer  
Buy More - SubDepartment

Job Title  
Weekly Worker

Job Order Id  
4295046066

Branch  
High Tech SE Internal

Pay Rate  
2.00

Bill Rate  
2.00

Status  
Pending Web Order

Date Opened  
1/4/2023

Job Order Duration  
9 months

Supervisor  
--

Supervisor Office Phone  
--

Gross Profit Calculator

Messages

Assignments

Contact Roles

Finkelstein, Moses (14986)  
Ordered By  
(222) 222-4321 moses@buymore.com

**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.

The screenshot shows the 'Assignment Records' page for a specific assignment. The top navigation bar includes tabs for VISIFILE, DETAILS, DOCUMENTS, MESSAGES, CUSTOM DATA, and ASSIGNMENT CUSTOM CONTENT. The left sidebar contains a navigation menu with options like EMPLOYEES, CUSTOMERS, CONTACTS, JOB ORDERS, ASSIGNMENTS, PROSPECTS, TASKS, and QUICK. The main content area displays a 'Snapshot' of the assignment details, including the Assignment Id (4302498161), Employee Id (4296221999), Branch (High Tech SE Internal), Salary (15.00), Fee (1.80), and Employer (NursesNow, Inc). The Status is 'Hired Perm'. A 'Gross Profit Calculator' link is also visible. Below the snapshot is a 'Messages' section with a red plus icon and the text 'No messages'.

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.

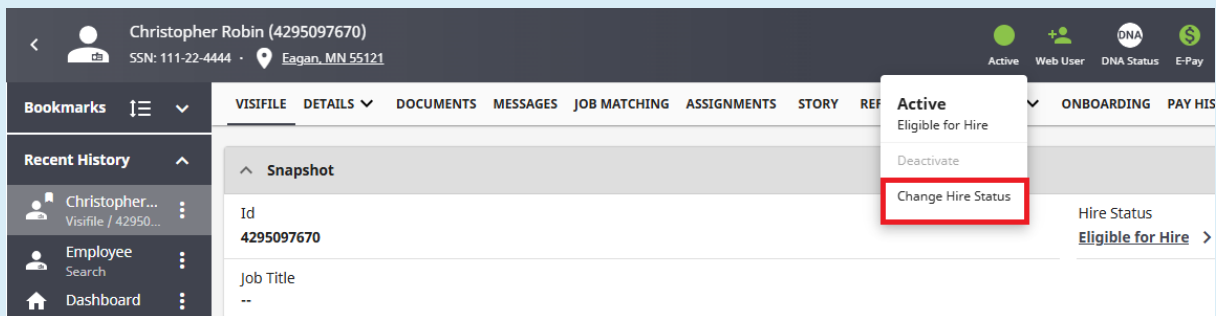
The screenshot shows a record status bar for Alexander "test" Abbott (4296221999). The bar includes a back arrow, a user icon, the name and ID, the SSN (244-44-4444), the company (HiTech Temps), the location (CITYCITY, LA 11223), and a green 'Active' status indicator.

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

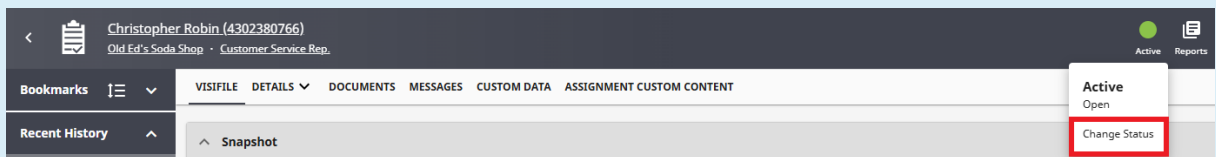
- **Active** records are employees, customers, job orders, etc. that you are currently working with or are currently in progress.
- **Inactive** records are records you are ready to archive - for example, an employee who was hired full time for one of your customers or a customer that went out of business.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

**\*Note\*** By selecting the charm within the record's header, you can update the status.

For employee records, you can change the "Hire Status":



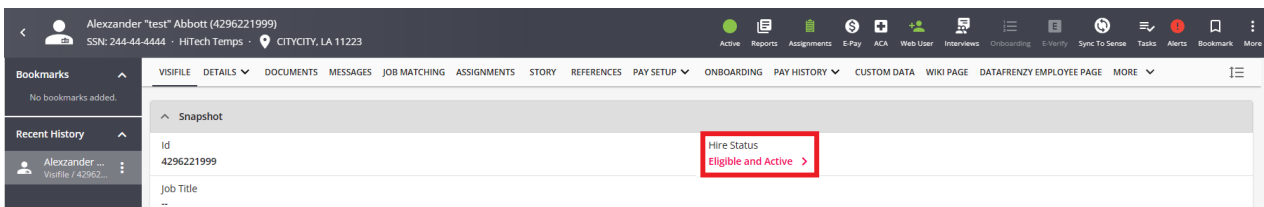
For customer, contact, job order, and assignment records, you can change the "Status":



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.



**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.

The screenshot displays the 'Visifile' interface for a record belonging to Alexander Abbott (ID: 4296211160). The interface is divided into a top navigation bar, a left sidebar, and a main content area. The top bar includes icons for Active, Reports, Assignments, E-Play, ACA, Web User, Interviews, Onboarding, E-Verify, Sync To Sense, Tasks, Bookmark, and More. The sidebar contains 'Bookmarks' (No bookmarks added) and 'Recent History' (Alexander Abbott, Visifile / 4296211160). The main content area shows a 'Snapshot' of the record with fields for Id (4296211160), Job Title, and Hire Status (Eligible for Hire). Below the snapshot are sections for 'Note', 'Contact Information' (Email: test@mail.com), 'Messages' (AUGUST 2023), 'Resume', and 'Assignments'. Each section has a red circular icon with a plus sign in the top right corner.

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

### Details

Details include a lot of important information for that record including related addresses, statuses, etc.

Alexzander Abbott (4296211160)

SSN: 111-22-2334 · High Tech Internal · City, IA

Active

Reports

Assignments

E-Pay

ACA

Web User

Interviews

Onboarding

E-Verify

Synct To Sense

Tasks

Bookmark

More

Bookmarks

No bookmarks added.

Recent History

Alexzander ...

Details / 4296...

VISIFILE

DETAILS

DOCUMENTS

MESSAGES

JOB MATCHING

ASSIGNMENTS

STORY

REFERENCES

PAY SETUP

ONBOARDING

PAY HISTORY

CUSTOM DATA

WIKI PAGE

DATAFREZNY EMPLOYEE PAGE

POST FF PAGE

MORE

Personal

ID

4296211160

Branch

High Tech NW Internal

Full Name

Alexzander S Abbott

Hierarchy

ClassVsTemp

Nickname

--

Alternate Employee Id

588

Identification

SSN

111-22-2334

Driver's License or ID Card Number

A123456789542

State

MN

Expiration Date

5/1/2024

Expiration date provided?

Yes

Class

--

How Heard Of

Where

Bill Board

Details

Off HWY I-90

Interest Codes / Skills

Work Interests

Available Over

CLIN

MON

TUE

WED

THU

FRI

CAT

## Documents

Click the documents tab to access, upload, and store electronic files specific to this record. This is an easy way to store and quickly access resumes, sales quotes, legal documents, etc.

Alexzander Abbott (4296211160)

SSN: 111-22-2334 · High Tech Internal · City, IA

Active

Reports

Assignments

E-Pay

ACA

Web User

Interviews

Onboarding

E-Verify

Synct To Sense

Tasks

Bookmark

More

Bookmarks

No bookmarks added.

Recent History

Alexzander ...

Documents / ...

Alexzander ...

Details / 4296...

VISIFILE

DETAILS

DOCUMENTS

MESSAGES

JOB MATCHING

ASSIGNMENTS

STORY

REFERENCES

PAY SETUP

ONBOARDING

PAY HISTORY

CUSTOM DATA

WIKI PAGE

DATAFREZNY EMPLOYEE PAGE

POST FF PAGE

MORE

Documents

DOCUMENTS

No documents

No required documents added yet

Select a document to preview or, add a new required document

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.

Alexzander Abbott (4296211160)

SSN: 111-22-2334 · High Tech Internal · City, IA

Active

Reports

Assignments

E-Pay

ACA

Web User

Interviews

Onboarding

E-Verify

Synct To Sense

Tasks

Bookmark

More

Bookmarks

No bookmarks added.

Recent History

Alexzander ...

Messages / 42...

Alexzander ...

Documents / ...

Alexzander ...

Details / 4296...

VISIFILE

DETAILS

DOCUMENTS

MESSAGES

JOB MATCHING

ASSIGNMENTS

STORY

REFERENCES

PAY SETUP

ONBOARDING

PAY HISTORY

CUSTOM DATA

WIKI PAGE

DATAFREZNY EMPLOYEE PAGE

POST FF PAGE

MORE

Filter by message text...

2 messages

DATE

4/2/2024

SORT BY

Date Created

DESC

AUGUST 2023

WC Invite - Aug 3rd, 8:34 PM

A WebCenter Invitation was sent

Nicole Neville

WC Invite - Aug 3rd, 8:28 PM

A WebCenter Invitation was sent

Nicole Neville

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

# Related Articles