

# Beyond - Record Types

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## Record Types

There are five 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.).

[Employee](#)

[Customer](#)

[Contact](#)

[Order](#)

[Assignment](#)

## Employee Records

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

The screenshot shows the 'EMPLOYEE' record for Christopher Robin. The header includes the name and ID (4295097670), along with SSN and location. A navigation bar below the header contains tabs for VISIFILE, DETAILS, DOCUMENTS, MESSAGES, ASSIGNMENTS, STORY, REFERENCES, and MORE. The main content area is divided into sections: 'Snapshot' with fields for Id (4295097670) and Hire Status (Eligible for Hire); 'Contact Information' with email (christopher.robin@xip.xom) and phone ((456) 789-1250); and 'Messages' with two recent messages from May 2020, including a Friday check-in and a job offer for a Customer Service Rep. position.

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.

**To Learn More:**

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

## Customer

The customer record is where you will document sales activity and service rep interactions with your current, previous, and future customers. This type of record was designed to not only help you establish and grow your partnerships but also track important metrics like where they are at in your sales cycle, upcoming hiring needs, current pain, and even your competition. The customer record is where you will find work site addresses, contact information and billing setup. Use the customer record to measure your success, and store documents like customer-specific benefits information, employee safety information and release forms.

**Trainer tip:** Make sure you enter correct and updated information here. Information from the customer record will automatically flow to the order and assignment records.

The screenshot displays a customer record for 'Real Steel (4295012443)' in a software application. The interface includes a search bar at the top right, navigation tabs, and a sidebar with search options. The main content area shows the following data:

Snapshot			
Last Payment	12/7/2018	YTD Sales	132,151.88
AR Balance	780,055.64	Lifetime Sales	663,260.50
Status	Active		

Below the snapshot is a 'Note' section with the text 'No note available'. The 'Addresses' section contains the following information:

Address Type	Address
Primary Address	8546 Vista Road Bloomington, MN 55121 United States of America
Billing Address	8546 Vista Road Bloomington, MN 55420 United States of America
Default Worksite: Stadium	333 CARLITO'S WAY LAKE ELMO, MN 55042 United States of America

## 3.) Contact

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. 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!

**CONTACT** Hamil, Mark (10295)  
Operation Manger · Bloomington, MN 55420

VISIFILE DETAILS DOCUMENTS MESSAGES CUSTOM DATA

**Snapshot**

Title	Operation Manger	Customer	Real Steel - Primary
Branch	Minneapolis	Status	Active >

**Note**  
No note available

**Contact Information**

- Mark@starwars.xom  
Email
- (651) 651-6516  
Phone
- swanson.alexander@gmail.com  
Email Personal

#### 4.) Order

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. Order records can be searched and viewed individually or by category like customer, order status and more.

**Trainer tip:** When your customers request more than one employee for the same job, you can choose to either create one new order that requests multiple employees, or you may create multiple new orders, each requesting one employee.

**JOB ORDER** Job Order (4295088705)  
Real Steel - Primary (4295088705)  
Electrician: 1 of 4 positions filled

VISIFILE DETAILS CANDIDATES DOCUMENTS MESSAGES CUSTOM DATA

**Snapshot**

Customer	Real Steel - Primary	Job Title	Electrician
Job Order Id	4295088705	Branch	Minneapolis
Pay Rate	16.00	Bill Rate	27.20
Status	Closed >	Date Opened	3/16/2018
Job Order Duration	Indef	Supervisor	Hamil, Mark
Supervisor Office Phone	--		

**Messages**

APRIL 2018

- Ended - Apr 30th, 5:15 PM  
Customer: Real Steel Department: Primary Estimated End Date: UnknownStatus: Completed Early Performance Note: Lay off  
alexander.swanson

MARCH 2018

- Absent (Sick) - Mar 16th, 10:42 AM  
Called in sick  
alexander.swanson

#### 5.) Assignment

Information from the employee record like address, zip code and pay setup details combines with information from the order record like work site address (which flows from the customer record) and results in the final product - the assignment record. Whether you created one order requiring multiple employees, or one order requiring one employee, every time you assign an employee to an order you will create a separate assignment record. The assignment record is what ties the employee, customer, and order records together. It is what generates the timecards used to pay your employees and bill your customers.

**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.

The screenshot shows a software interface with a blue header and a sidebar on the left. The main content area displays an assignment record for Terry Crews (4301401438) at Real Steel - Electrician. The record is marked as 'Completed Early'. The 'Messages' section shows a log of activity from April 2018, including a message from Alexander Swanson dated April 30th, 5:15 PM, with the subject 'Customer: Real Steel Department: Primary Estimated End Date: UnknownStatus: Completed Early Performance Note: Lay off'.

Field	Value	Field	Value
Assignment Id	4301401438	Status	Completed Early
Employee Id	4295079892	Job Order Id	4295088705
Branch	Minneapolis	Temp Phone	--
Pay Rate	16.00	Bill Rate	27.20
Employer	High Tech Staffing		

## Record Statuses

### Active Records vs Inactive Records

Active records are records we want to use. Inactive records are records we don't want to use. You can tell if a record is active by looking to see if there is a green or grey bubble in the "Charms" right next to the record name. If the bubble is green (shown below), the record is active. If the bubble is grey, the record is inactive.

The screenshot shows the same software interface as above, but the assignment record for Terry Crews (4301401438) is now marked as 'Open'. The 'Charms' icon next to the record name is green, indicating it is active. The 'Messages' section is empty.

Field	Value	Field	Value
Assignment Id	4301401438	Status	Open
Employee Id	4295079892	Job Order Id	4295088705
Branch	Minneapolis	Temp Phone	--
Pay Rate	16.00	Bill Rate	27.20
Employer	High Tech Staffing		

## Common Tabs within a Record

1. 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.

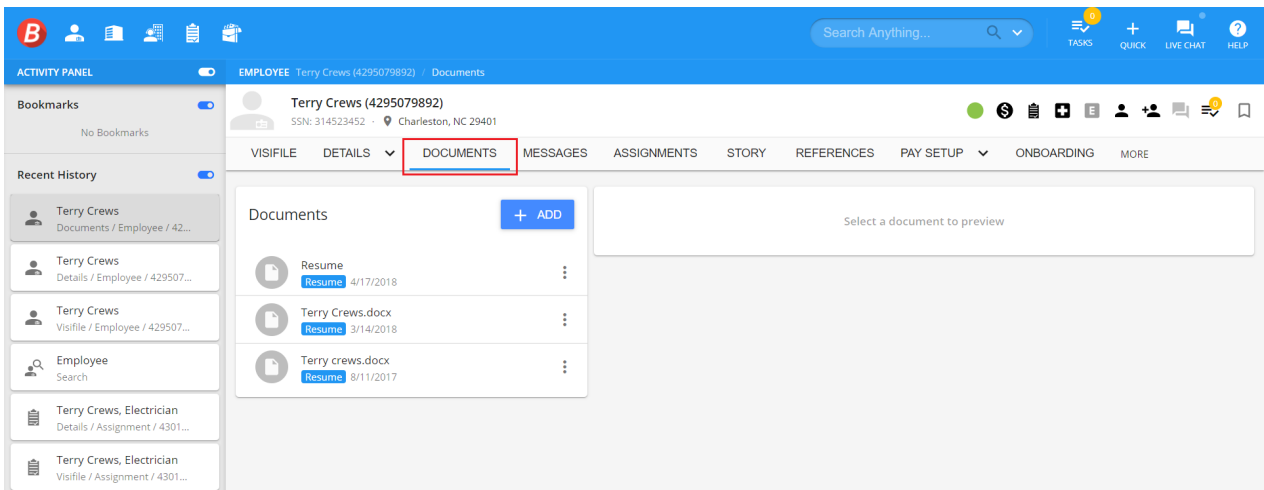
**Trainer tip:** You can individually customize the order in which the cards appear on the "Visifile" by clicking 'CUSTOMIZE' in the top right corner and then dragging and dropping the cards to your desired location.

The screenshot shows the employee record for Terry Crews (4295079892) in the VISIFILE tab. The interface includes a search bar at the top, a navigation menu with tabs like VISIFILE, DETAILS, DOCUMENTS, MESSAGES, ASSIGNMENTS, STORY, REFERENCES, PAY SETUP, ONBOARDING, and MORE. The main content area is divided into sections: Snapshot, Note, and Contact Information. The Snapshot section shows the employee's ID (4295079892) and Hire Status (Eligible and Active). The Note section is currently empty. The Contact Information section lists an email address (Terry.crews@gmail.com) and two phone numbers: a cell phone ((623) 562-3454) and a home phone ((916) 215-5555).

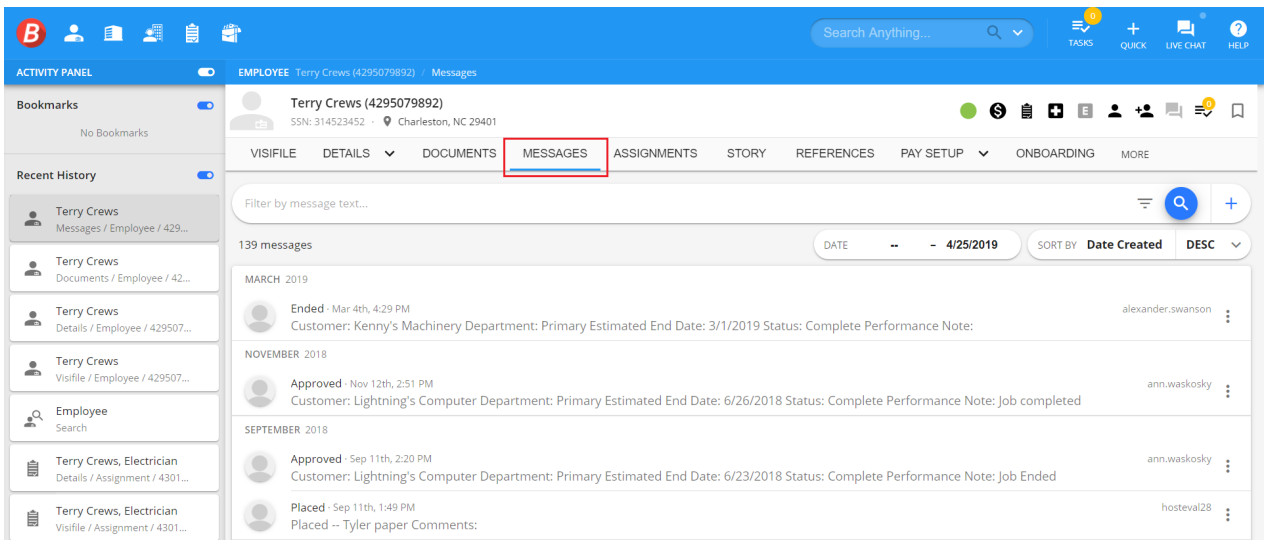
2. DETAILS: Here, you may add and edit the record to include additional information like addresses and status.

The screenshot shows the employee record for Terry Crews (4295079892) in the DETAILS tab. The interface is similar to the previous screenshot but with different content. The main content area is divided into sections: Personal, How Heard Of, Interest Codes, and Equal Employment Opportunity. The Personal section shows the employee's ID (4295079892), Full Name (Terry Crews), SSN (314523452), Branch (New Brighton), Nickname (--), and Alternate Employee Id (--). The How Heard Of section shows Where and Details fields. The Interest Codes section is currently empty. The Equal Employment Opportunity section shows fields for Date of Birth, Gender, Veteran Status, Nationality, Birth Place, Disabled, E-Verified, Citizen, and Date Entered, all of which are currently empty.

3. DOCUMENTS: Click the documents tab to access, upload, and store electronic files specific to this record. On an employee record, you might store their resume here, whereas on a customer record this is where you might choose to store your customer's benefits or employee handbook packets. Other examples of documents may include contracts, legal files, on-boarding instructions, and process manuals. Think of the documents section as an electronic filing cabinet.



4. **MESSAGES:** The messages section contains the history of messages logged on this record. This is also where you may add new messages. Each interaction you have with the subject of this record should be logged here, including actions like phone messages, e-mails and interviews.



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