

Beyond - Quick View

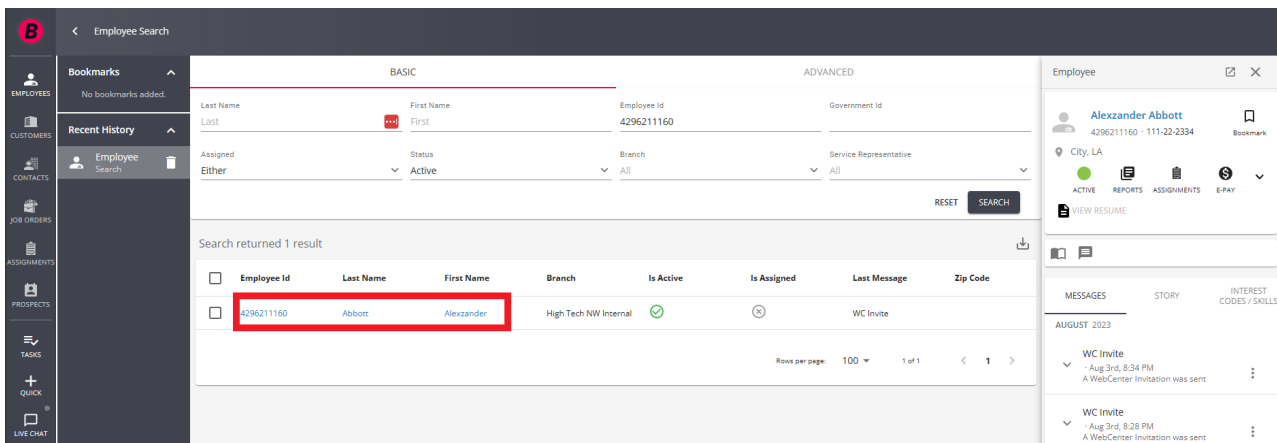
Last Modified on 04/18/2024 3:39 pm CDT

The Quick View

Beyond offers an easy way to manage records in the system called 'the quick view.'

This is a special side bar that will be appear when you right click on a record in Beyond.

Whether interacting with records displayed in the 'bookmarks' section or while reviewing records from a search, a simple right click will give the user a way to interact with a record rather than navigating directly to it.



The screenshot displays the 'Employee Search' interface. On the left is a navigation sidebar with icons for EMPLOYEES, CUSTOMERS, CONTACTS, JOB ORDERS, ASSIGNMENTS, PROSPECTS, TASKS, QUICK, and LIVE CHAT. The main area is split into 'BASIC' and 'ADVANCED' search filters. The 'BASIC' section includes fields for Last Name (Last), First Name (FIRST), Employee Id (4296211160), Government Id, Assigned (Either), Status (Active), Branch (All), and Service Representative (All). A 'SEARCH' button is present. Below the filters, a search result is shown: 'Search returned 1 result' with a table containing one row for Alexander Abbott (Employee Id: 4296211160, Branch: High Tech NW Internal, Is Active: Yes, Last Message: WC Invite). A red box highlights the first row of the table. On the right, a 'Quick View' sidebar for Alexander Abbott is open, showing his profile, location (City, LA), and a list of messages from August 2023, including two 'WC Invite' messages.

Once opened, 'quick views' give us a snapshot of the particular record we are attempting to access.

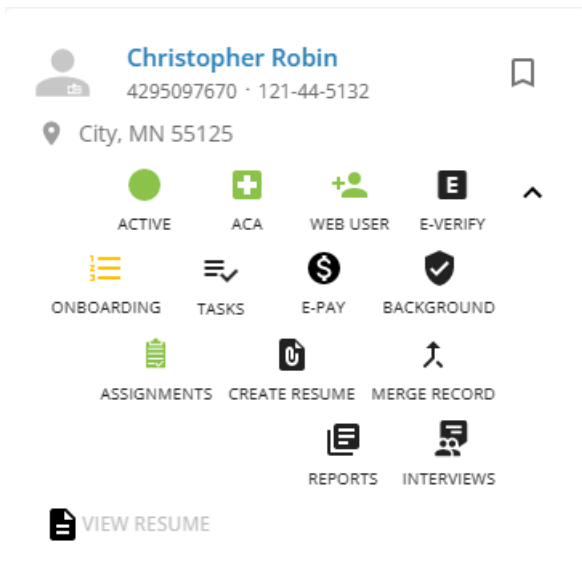
The quick view is available on the following record types:

1. [Employee Quick View](#)
2. [Customer Quick View](#)
3. [Contact Quick View](#)
4. [Order Quick View](#)
5. [Assignment Quick View](#)

Employee Quick View

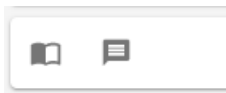
A 'quick view' of the employee record can be broken out into 4 major sections.

The Avatar Section:



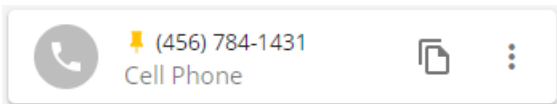
Here, users may observe details concerning the status of the employee including their charms. This section also includes links to the employee's address and their resume.

The Actions Section:



This section gives users the ability to add a new contact method or message to the employee's record.

The Contact Section:



Here, users will be able to note and add to the various contact methods set up on the employee's record. By selecting the email of an employee, users may directly email that employee provided the user has their email integrated into the system.

The Information Section:


MESSAGES	STORY	INTEREST CODES / SKILLS
MAY 2020		
Friday Check · May 29th, 2:51 PM Called and talked to Chris. He is still e...		⋮
Buzz Offered · May 22nd, 8:51 AM The employee Robin, Christopher has...		⋮
APRIL 2020		
Covid PSL Self Req · Apr 2nd, 1:13 PM Called to Request COVID related leave		⋮
MARCH 2020		
Buzz Offered · Mar 4th, 3:59 PM The employee Robin, Christopher has...		⋮
GO TO MESSAGES PAGE		

This section provides you with recent messages logged, story information, and interest codes for the employee.

Customer Quick View


A 'quick view' of the customer record can be broken out into three major sections.

The Avatar Section:



Old Ed's Soda Shop - Primary

4295000617



📍 Minneapolis, MN 55121

●
ACTIVE


☰
ONBOARDING

📄
REPORTS



☑️
TASKS


Here, users may observe details concerning the status of the customer including this customer's charms. It also includes a link to the customer's address which opens a Google Maps location within a new tab in the browser.

The Contact Section:





independence@inn.x...
Email



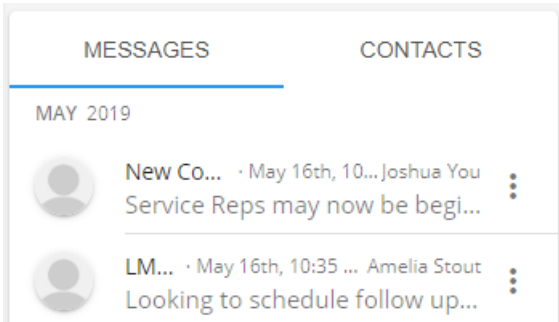
(321) 123-4567
Office Phone

Here, users will be able to note and add to the various contact methods set up on the customer's record. By

selecting the email of a customer, users may directly email that customer provided the user has their email integrated into the system.

The Information Section:



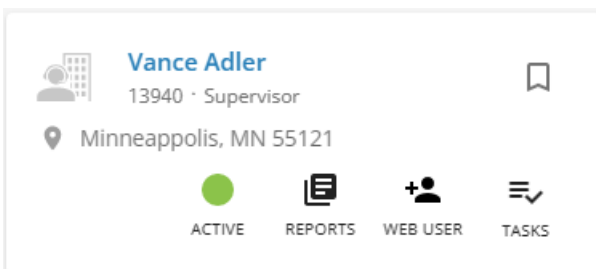
This section lists recent messages logged and active contacts related to this customer.

To log a new message use the  button.

Contact Quick View

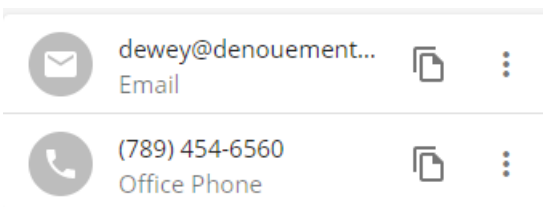
A 'quick view' of the contact record can be broken out into three major sections.

The Avatar Section:



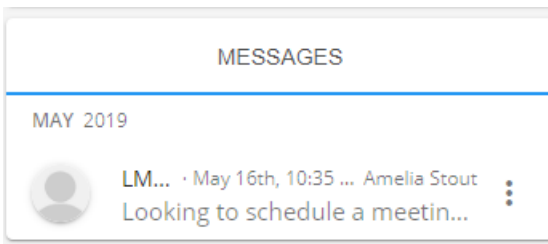
Here, users may observe details concerning the status of the contact including its charms. It also includes a link to the contacts address which opens a Google Maps location within a new tab in the browser.

The Contact Section:



Here, users will be able to note and add to the various contact methods set up on the contact's record. By selecting the email of a contact, users may directly email that contact, provided the user has their email integrated into the system.

The Message Section:



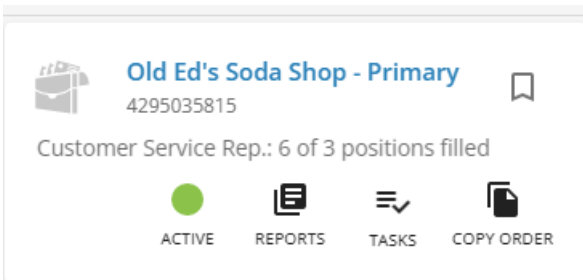
This section displays recent messages logged on the contact's record.

To log a new message use the  button.

Order Quick View

A 'quick view' of the order record can be broken out into three major sections.

The Avatar Section:






Here, users may observe details concerning the status of the order including its charms.

The Job Details Section:

SUN	MON	TUE	WED	THU	FRI	SAT
Shift		Job Order Type				
Morning		Temp To Full-Time				
Positions Required		Positions Filled				
5		2				
Start Date		Exp. End Date				
5/14/2018		--				

Here, users will be able to note the detailed specifications of the job order, including the start date, expected end date, and the shift information.

The Information Section:

MESSAGES	CONTACT ROLES
MAY 2019	
	Refu... · May 15th, 11:... Amelia Stout Refused -- Independence Inn...
	Custome... · May 15t... Amelia Stout Interview -- Independence In...
	Order C... · May 15th,...Amelia Stout Candidate -- Independence I...


This section shows recent messages logged and any contact roles associated with this order.

To log a new message use the  button.


Assignment Quick View


A 'quick view' of the assignment record can be broken out into three major sections.


The Avatar Section:





Christopher Robin
4302361161 · 100 Acre Woods, Inc. 2 - Primary





ACTIVE


REPORTS


ONBOARDING


TASKS


SEND EMAIL

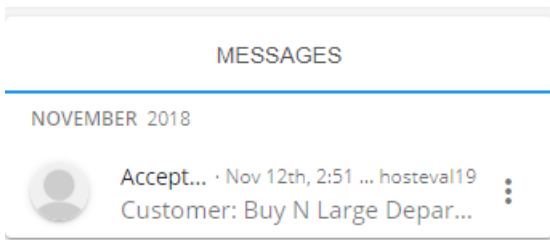
Here, users may observe details concerning the status of the assignment including its charms.

The Job Details Section:

SUN	MON	TUE	WED	THU	FRI	SAT
Job Title		Business Code				
Warehouse Worker		Production				
Start Date		Orig Start Date				
11/19/2018		11/19/2018				
Exp. End Date		Shift				
12/1/2018		AM shift				
Start Time		End Time				
8:00 AM		4:00 PM				

Here, users will be able to note the detailed specifications of the assignment including the start date, expected end date, and the shift information.

The Message Section:



This section shows recent messages logged related to the assignment shown.

To log a new message use the  button.

Related Articles