

Beyond - Quick View

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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 Beyond system interface. At the top, there is a navigation bar with a search box containing 'Search Anything...' and icons for TASKS, QUICK, LIVE CHAT, and HELP. Below the navigation bar is the 'ACTIVITY PANEL' which is currently closed. The main content area is divided into three sections: 'Bookmarks', 'BASIC', and 'ADVANCED'. The 'Bookmarks' section on the left lists several items, including 'Independence Inn', 'Andrew Web', 'Last Chance General St...', 'Hotel Denouement', 'Chef', 'Dewey Denouement', 'James West, Distributio...', 'Nathan Jackson', and 'Steve Aardson'. The 'BASIC' section shows a search for '%hotel' with a 'SEARCH' button and a 'RESET' button. Below the search, it indicates 'Search returned 6 results' and displays a table of results. The table has columns for 'Customer Id', 'Name', and 'Department'. The row for '4295014308 Hotel Denouement Primary' is highlighted with a red box. The 'ADVANCED' section on the right shows a 'Customer' quick view for 'Hotel Denouement - Primary' with details like '4295014308' and 'Eagan, MN 55123'. Below this, there are sections for 'MESSAGES' and 'CONTACTS'.

Customer Id	Name	Department
4295012363	Hewing Hotel	Primary
4295014308	Hotel Denouement	Primary
4295010878	Lowes Hotels	Primary
4295010168	Oz Hotels	Primary
4295012357	Solo Hotel	Primary

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](#)
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Employee Quick View








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


Employee ✎ ✕



 **Nathan Jackson** 🔖


4295080507 · 123456852

ST PAUL, MN 55321

       ⌵

 [VIEW RESUME](#)


 

 📌 (456) 784-1431 📄 ⋮

Cell Phone


MESSAGES STORY INTEREST CODES

MAY 2019


 Avai... · May 8th, ...companion-twdemo ⋮

Date: 2019.05.08

APRIL 2019


 Ava... · Apr 18th,... companion-twdemo ⋮

Date: 2019.04.18

 Order Can... · Apr 18th, 1... hosteval17 ⋮

Candidate -- Johnson Trucking...



MARCH 2019









 Availa... · Mar 26th, 9:39...Amelia Stout ⋮


monday - friday this week

[GO TO MESSAGES PAGE](#)

The Avatar Section:

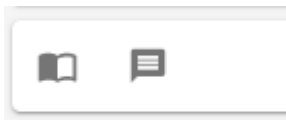
 **Nathan Jackson** 
4295080507 · 123456852
ST PAUL, MN 55321

 VIEW RESUME

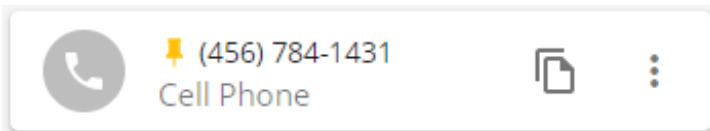
Here, users may observe details concerning the status of the employee including their charms. This section also includes links to the employee's address and their resume.

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
MAY 2019		
	Avai... · May 8th, ...companion-twdemo Date: 2019.05.08	⋮
APRIL 2019		
	Ava... · Apr 18th, ... companion-twdemo Date: 2019.04.18	⋮
	Order Can... · Apr 18th, 1... hosteval17 Candidate -- Johnson Trucking...	⋮


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:

Customer ✎ ✕

 **Independence Inn - Primary** 🔖
4295013537
Excelsior, MN 55331
 





 independence@inn.x... 📄 ⋮
Email

 (321) 123-4567 📄 ⋮
Office Phone




MESSAGES CONTACTS

MAY 2019

 **New Co...** · May 16th, 10... Joshua You
Service Reps may now be begi... ⋮

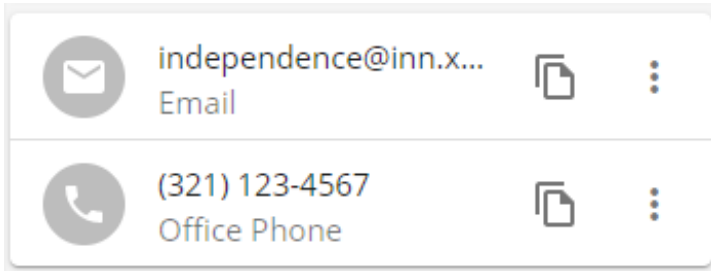
 **LM...** · May 16th, 10:35 ... Amelia Stout
Looking to schedule follow up... ⋮

The Avatar Section:

 **Independence Inn - Primary** 🔖
4295013537
Excelsior, MN 55331
 

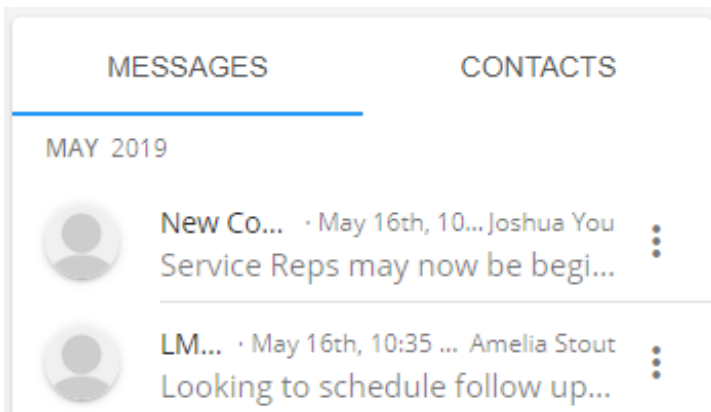
Here, users may observe details concerning the status of the customer including this customer's charms. It also includes a link to the customer's address which opens a Google Maps location within a new tab in the browser.

The Contact Section:



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:

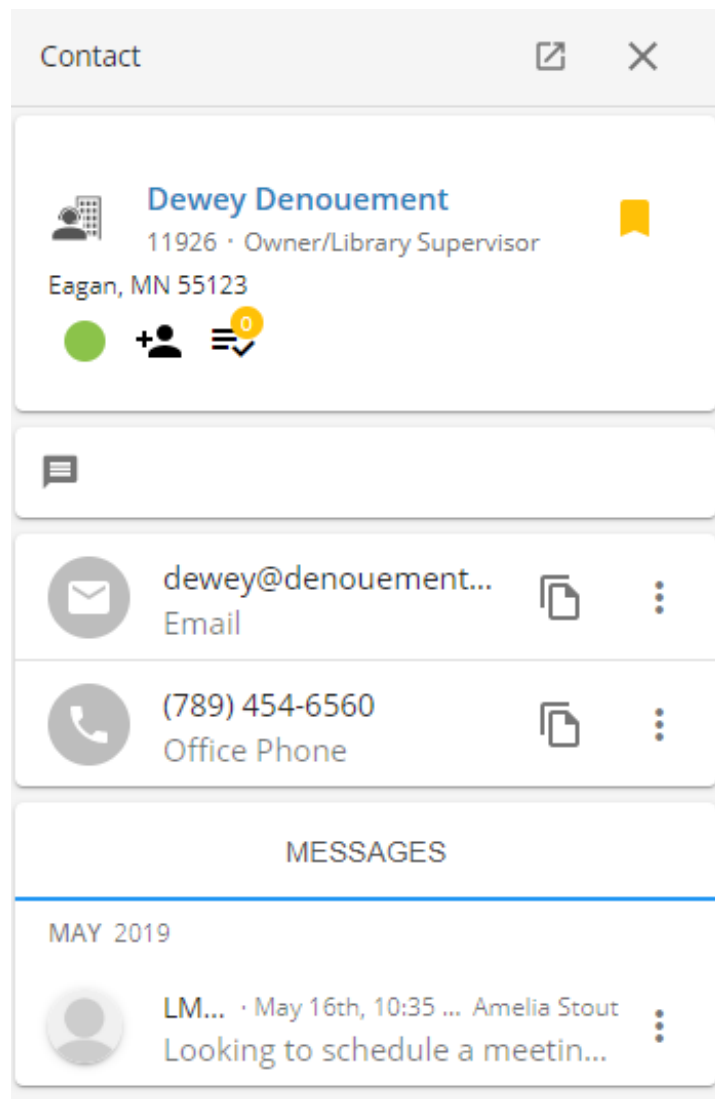


This section lists recent messages logged and active contacts related to this customer.

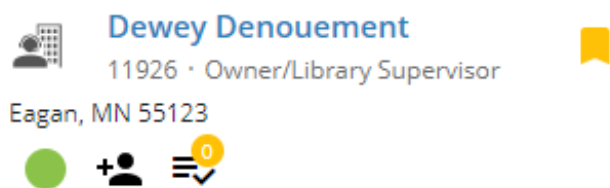
To log a new message use the  button.

Contact Quick View

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

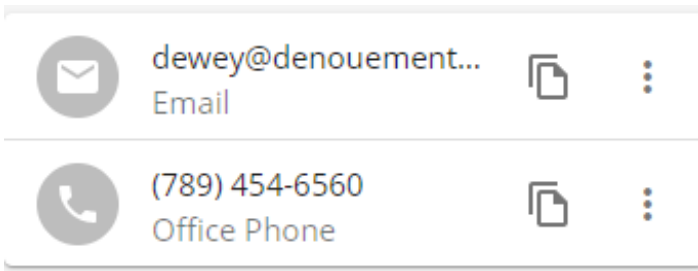


The Avatar Section:



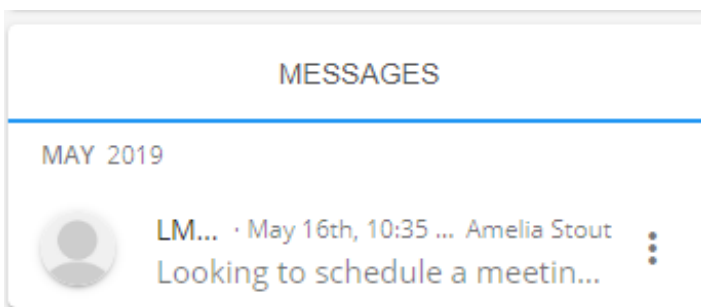
Here, users may observe details concerning the status of the contact including its charms. It also includes a link to the contact's address which opens a Google Maps location within a new tab in the browser.

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:

Job Order

Independence Inn - Primary

4295088951

Chef: 2 of 5 positions filled

⚠
☰
0

SUN
MON
TUE
WED
THU
FRI
SAT

Shift Morning	Job Order Type Temp To Full-Time
Positions Required 5	Positions Filled 2
Start Date 5/14/2018	Exp. End Date --

MESSAGES
CONTACT ROLES

MAY 2019

Refu... · May 15th, 11:...

Refused -- Independence Inn...

Amelia Stout

Custome... · May 15t...

Interview -- Independence In...

Amelia Stout

Order C... · May 15th,...

Candidate -- Independence I...

Amelia Stout

The Avatar Section:

Independence Inn - Primary

4295088951

Chef: 2 of 5 positions filled

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, 11:00 AM Amelia Stout Refused -- Independence Inn...
	Custome... · May 15th, 11:00 AM Amelia Stout Interview -- Independence Inn...
	Order C... · May 15th, 11:00 AM Amelia Stout Candidate -- Independence Inn...

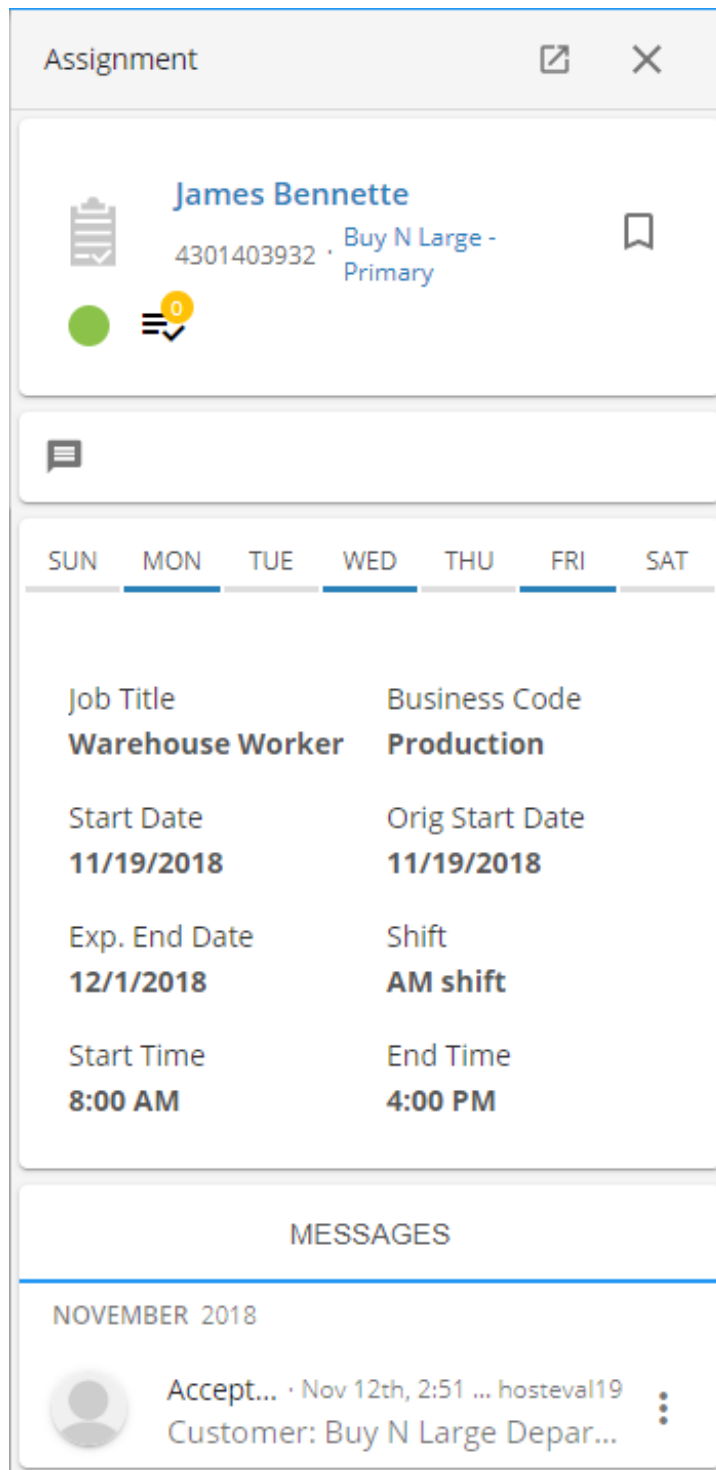
This section shows recent messages logged and any contact roles associated with this

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 screenshot shows a window titled "Assignment" with a close button (X) and a share icon. The main content is divided into three sections:

- Employee Information:** Displays the name "James Bennette", ID "4301403932", and assignment "Buy N Large - Primary". It includes a clipboard icon, a green status circle, a menu icon with a notification badge, and a bookmark icon.
- Weekly Schedule:** A tabbed interface with days of the week (SUN, MON, TUE, WED, THU, FRI, SAT). The "WED" tab is selected, showing a table of assignment details:

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

- MESSAGES:** A section titled "MESSAGES" with a horizontal line. It shows a message from "Accept..." dated "Nov 12th, 2:51" from user "hosteval19". The message content is "Customer: Buy N Large Depar...".

The Avatar Section:



James Bennette
4301403932 · Buy N Large - Primary

Icons: clipboard with checkmark, green circle, notification bell with '0', and bookmark.

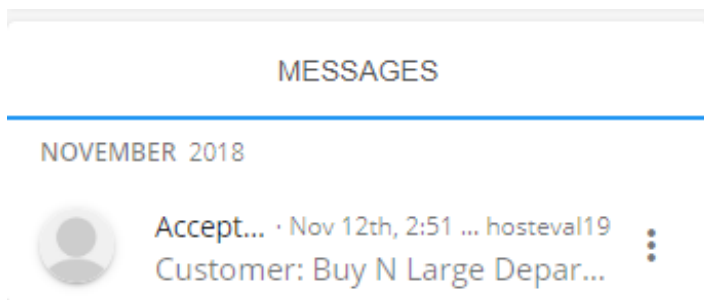
Here, users may observe details concerning the status of the assignment including its charms.

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:



MESSAGES

NOVEMBER 2018

Accept... · Nov 12th, 2:51 ... hosteval19
Customer: Buy N Large Depar...

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

To log a new message use the  button.

Related Articles