

Beyond - Quick View

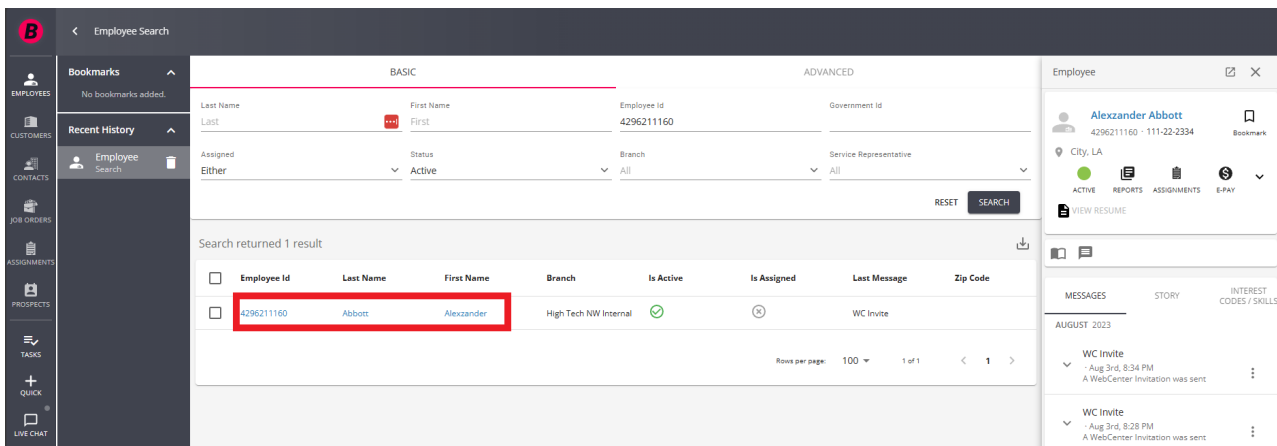
Last Modified on 11/13/2024 5:25 am CST

The Quick View

Beyond offers an easy way to manage records in the system called "Quick View".

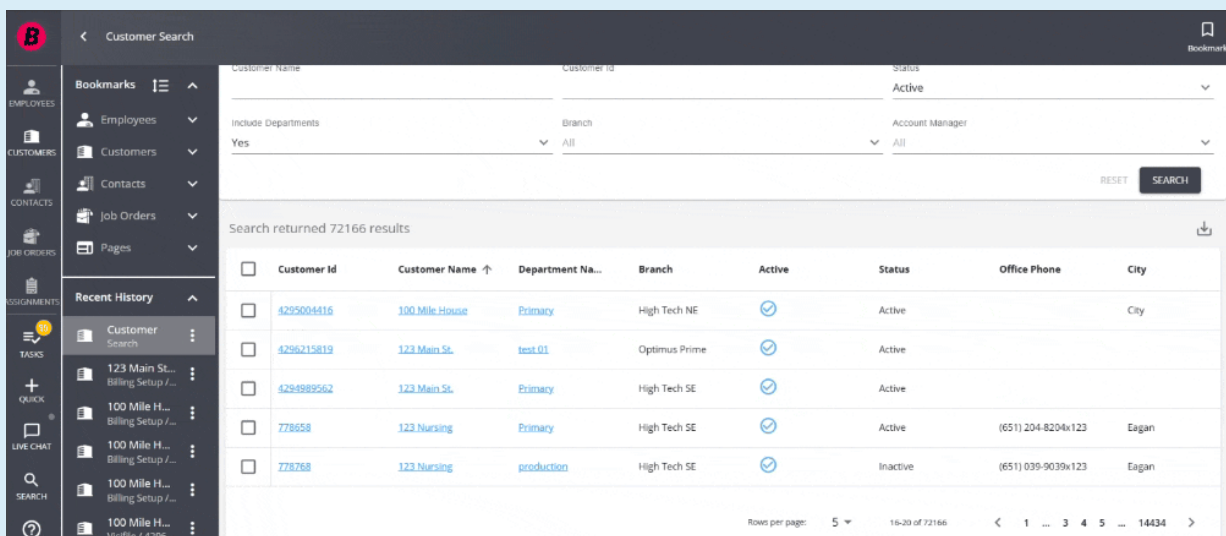
This is a special side bar that will appear when you right-click on a record in Beyond.

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.



Once opened, "quick view" gives us a snapshot of the particular record we are attempting to access.

Note When opening the "Quick View" from a search, so long as the search provides more than one result, you can select the arrows at the bottom of the "Quick View" window to navigate between records within the search results:



Depending on the record type being searched, selecting one of the following fields to open the Quick View will show the navigational arrows:

- Employee: ID, Last Name, First Name

- **Customer:** ID, Customer Name, Department Name
- **Contact:** ID, Last Name, First Name
- **Job Order:** ID, Job Title
- **Assignment:** ID

Right-clicking a field **not** mentioned above will **not** open the navigational arrows within the Quick View.

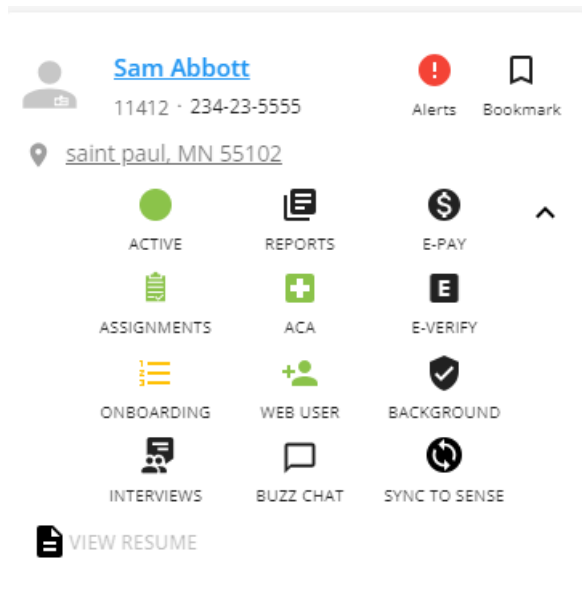
The quick view is available on the following record types:

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

Employee Quick View

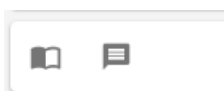
A 'quick view' of the employee record can be broken out into 4 major sections.

The Avatar Section:



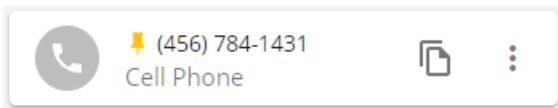
Here, users may observe details concerning the status of the employee including their charms. This section also includes links to the employee's address and their resume.

The Actions Section:



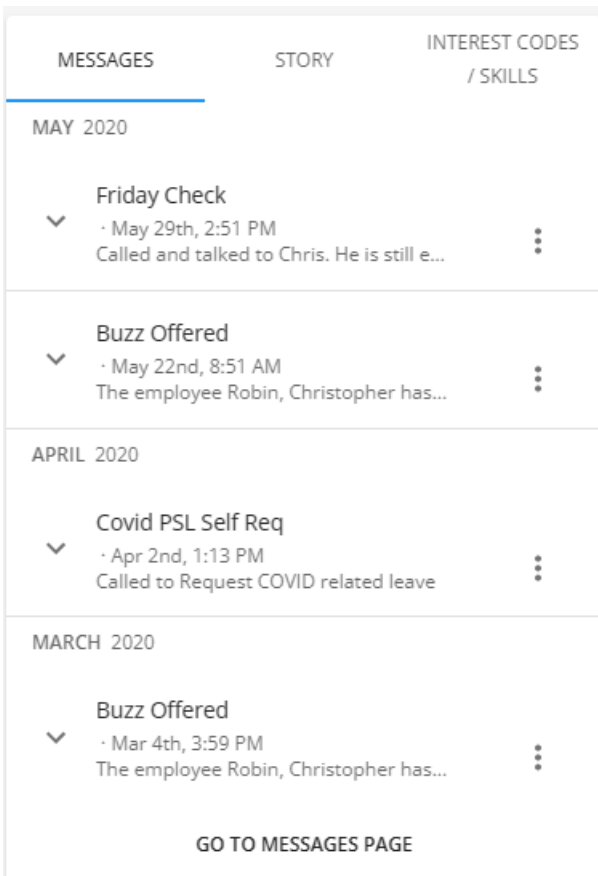
This section gives users the ability to add a new contact method or message to the employee's record.

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:

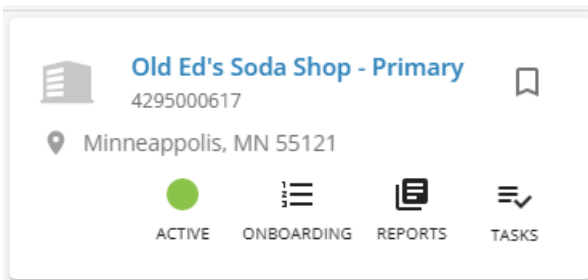


This section provides you with recent messages logged, story information, and interest codes for the employee.

Customer Quick View

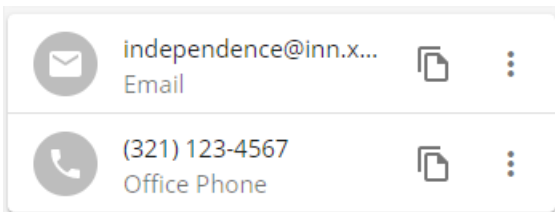
A 'quick view' of the customer record can be broken out into three major sections.

The Avatar Section:



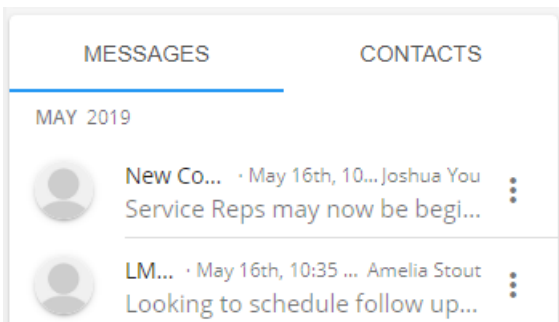
Here, users may observe details concerning the status of the customer including this customer's charms. It also includes a link to the customer's address which opens a Google Maps location within a new tab in the browser.

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:



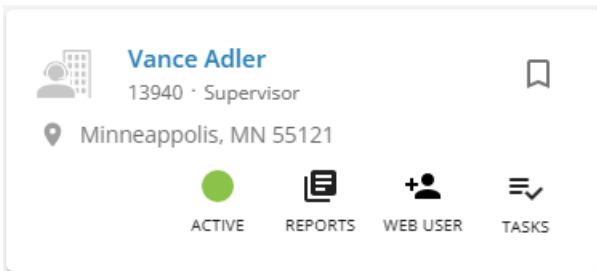
This section lists recent messages logged and active contacts related to this customer.

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:



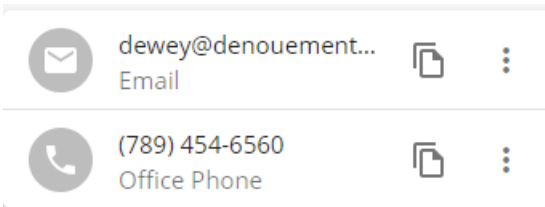
Vance Adler
13940 · Supervisor

Minneapolis, MN 55121

ACTIVE REPORTS WEB USER TASKS

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:

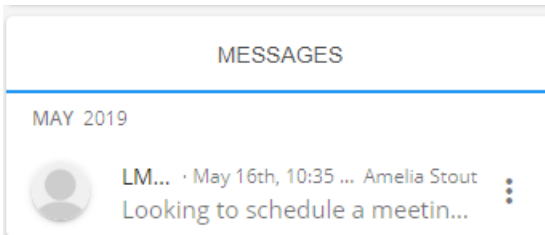


dewey@denouement...
Email

(789) 454-6560
Office Phone

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:



MESSAGES

MAY 2019

LM... · May 16th, 10:35 ... Amelia Stout
Looking to schedule a meetin...

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:



Old Ed's Soda Shop - Primary
4295035815

Customer Service Rep.: 6 of 3 positions filled

ACTIVE REPORTS TASKS COPY ORDER




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 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	Warehouse Worker		Business Code	Production		
Start Date	11/19/2018		Orig Start Date	11/19/2018		
Exp. End Date	12/1/2018		Shift	AM shift		
Start Time	8:00 AM		End Time	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