

Beyond - How to Create an Assignment Record

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What is an Assignment?

An assignment record is the fulfillment of a job order for a customer. When a customer places an order for employees, it is the recruiter's responsibility to create an assignment record for every employee intended to be placed on the order. This will help track placement history of each employee and create a timecard for this employee each week.

Active assignment records are those records that persist each week that the employee works. After the employee has finished an assignment, that assignment should be ended. Ended assignments are no longer considered active and will have an end date and status update to show they are completed.

Active assignments are important records for your front office team as they provide job details specific to that employee. They also are important for your back office team as each week a time card will be populated in the system for every active assignment based on the pay and bill rates listed there.

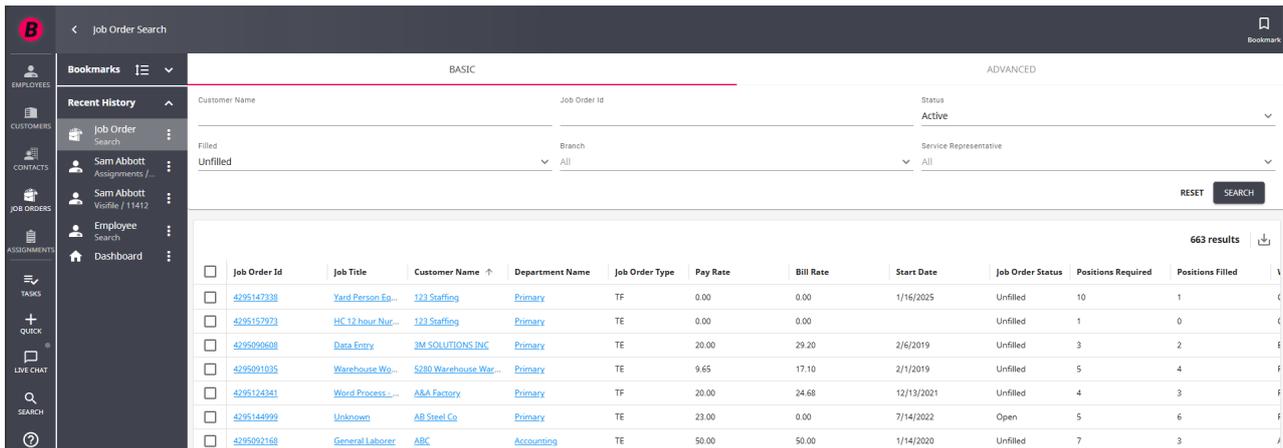
This article reviews:

1. [How to Create an Assignment](#)
 2. [Searching for Assignments](#)
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How to Create an Assignment

Note Before an assignment can be created, an order record must exist to tie it to. For help creating orders, check out [Beyond- How to Create an Order](#).

Navigate to the order you would like to create an assignment for. This can be done by utilizing an order that has been bookmarked or by searching for the order.



The screenshot shows the 'Job Order Search' interface. It features a sidebar with navigation options like 'EMPLOYEES', 'CUSTOMERS', 'CONTACTS', 'JOB ORDERS', 'ASSIGNMENTS', 'TASKS', 'QUICK', 'LIVE CHAT', and 'SEARCH'. The main area is divided into 'BASIC' and 'ADVANCED' search filters. Below the filters is a table with 663 results. The table columns are: Job Order Id, Job Title, Customer Name, Department Name, Job Order Type, Pay Rate, Bill Rate, Start Date, Job Order Status, Positions Required, and Positions Filled. The table contains several rows of data, including job orders for 'Yard Person', 'HC 12 hour Nur...', 'Data Entry', 'Warehouse Wo...', 'Word Process...', 'Unknown', and 'General Laborer'.

Job Order Id	Job Title	Customer Name	Department Name	Job Order Type	Pay Rate	Bill Rate	Start Date	Job Order Status	Positions Required	Positions Filled
4205147338	Yard Person	123 Staffing	Primary	TF	0.00	0.00	1/16/2025	Unfilled	10	1
4205157973	HC 12 hour Nur...	123 Staffing	Primary	TE	0.00	0.00		Unfilled	1	0
4205090608	Data Entry	3M SOLUTIONS INC	Primary	TE	20.00	29.20	2/6/2019	Unfilled	3	2
4205091035	Warehouse Wo...	5289 Warehouse War...	Primary	TE	9.65	17.10	2/1/2019	Unfilled	5	4
4205124341	Word Process...	A&A Factory	Primary	TF	20.00	24.68	12/13/2021	Unfilled	4	3
4205144999	Unknown	AB Steel Co	Primary	TE	23.00	0.00	7/14/2022	Open	5	6
4205092168	General Laborer	ABC	Accounting	TE	50.00	50.00	1/14/2020	Unfilled	7	3

Once an order has been selected, Beyond will remember that this is the last order that was visited. When assignments are about to be created, the last order will be the order Beyond will want to create the assignment for.

There are three ways to create an assignment:

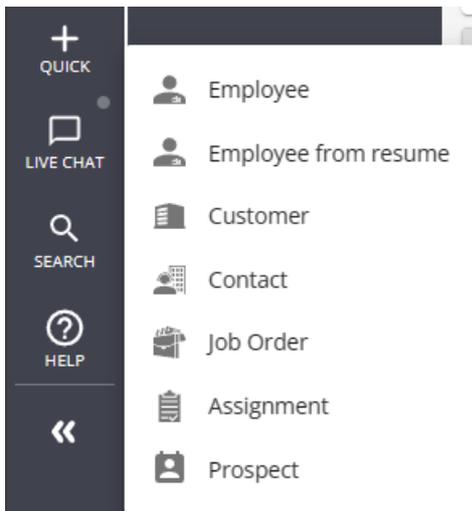
- The "Quick Add" button
- Employee Search
- Order Record

The "Quick Add" Button

To create an assignment, you must first view the order you would like to assign an employee to. The system will automatically try to assign an employee to the last order viewed.

The quick add button allows you to quickly add an assignment for an employee. It's important that you first know the employee you are going to assign. If you do not know who you are looking to assign, run an employee [search](#) first & find the employee you are looking for.

1. Select the "+ Quick" button in the lower left and select "Assignment" (assignment option will only be available once you have first viewed an order):



2. This will open the Add New Assignment wizard, Review the information:

Add New Assignment - Enter Assignment Information

1 Enter Assignment Information 2 Assignment Restrictions

Assigning To Job Order:

Old Ed's Soda Shop - Primary
Customer Service Rep.: 6 of 3 positions filled

Start Date
8/7/2019 ✕

- o Double check the Job Order
- o Enter the Start Date

3. Select the employee you are looking to assign

- o If you were not viewing an employee record, you will need to search for the employee. Use the Last, First, SSN, or ID fields to search:

Please use the search to find an employee:

Last	First	SSN	Id	
Aardson	Name		5759	

- o If you were on the employee's record that you wanted to assign, you will see their name selected at the bottom of the window:

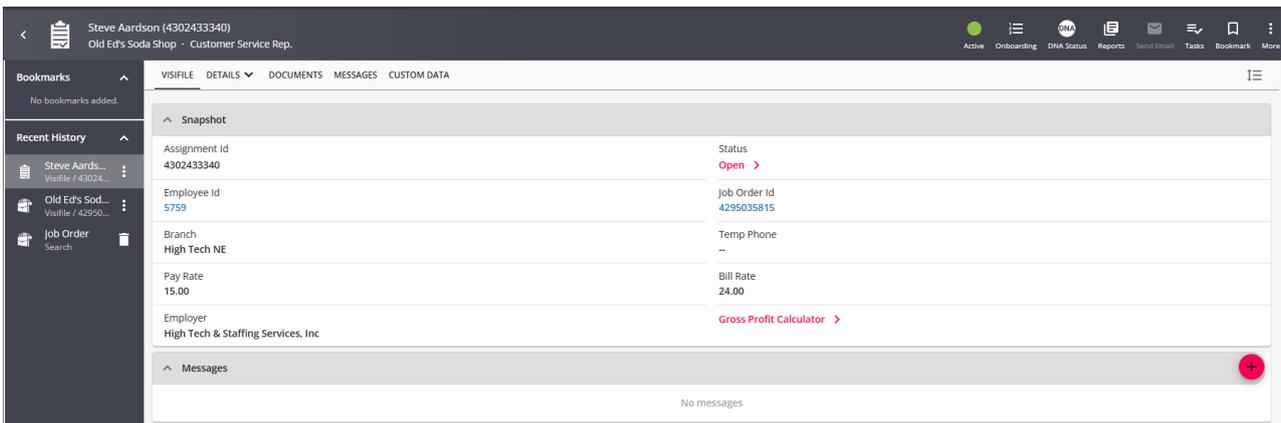
	Employee Id	Last Name	First Name	SSN
<input checked="" type="checkbox"/>	5759	Aardson	Steve	389648501

Rows per page: 10 ▼ 1 of 1

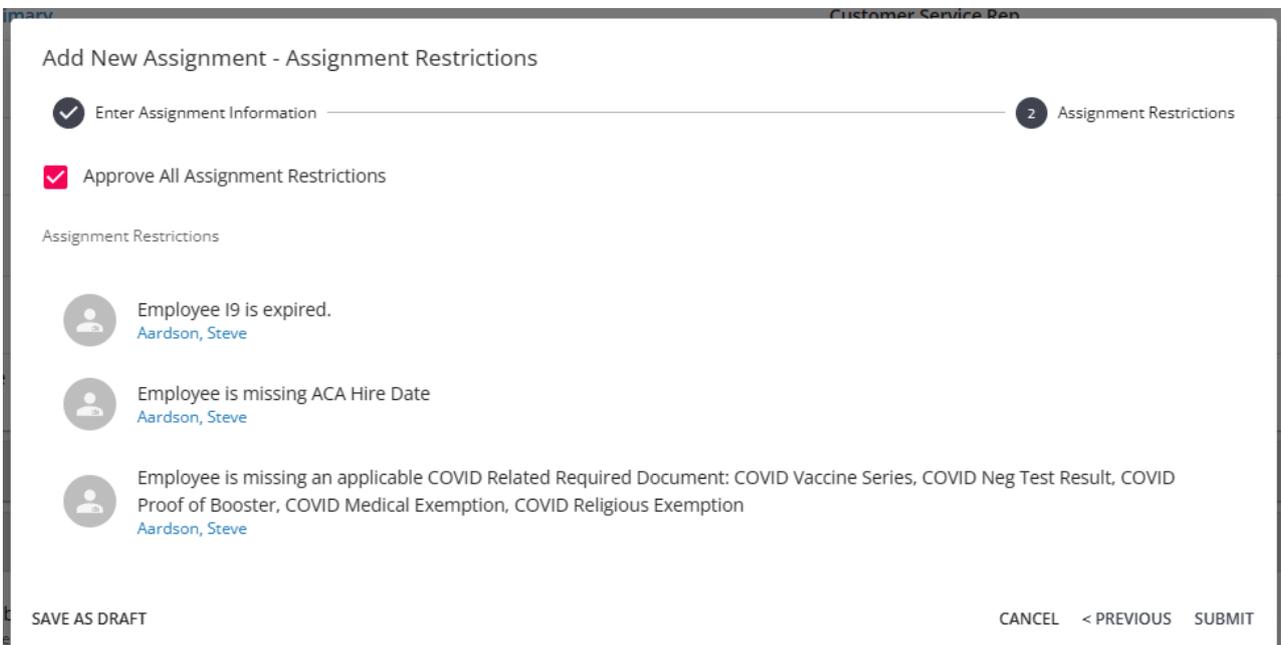
4. Select Submit

Once you have submitted an assignment, the system will check for assignment restrictions.

If no assignment restrictions are found, you will be redirected to the employee's assignment record.



If assignment restrictions are found, they will be displayed for the recruiter to review. Some restrictions can be approved by selecting the approve restrictions checkbox. Other restrictions will require the recruiter to return to the employee record to make changes before creating the assignment.



For more information on assignment restrictions see [Beyond - Assignment Restrictions](#).

Employee Search

To create an assignment, you must first view the order you would like to assign an employee to. The system will automatically try to assign an employee to the last order viewed.

When performing an employee search, one or more employees can be assigned from the search results page.

1. Navigate to employee search and select your search criteria:

☰ Click to select a saved search...

NOT **AND** OR

☰ > Is Active IS TRUE Show in results

☰ > Zip Code CONTAINS 55121 Show in results

☰ > Is Assigned IS FALSE Show in results

+ RULE / GROUP

SAVE...

o For more information on searching, see [Beyond - Advanced Searching](#)

2. Select search and your search results will appear below:

475 results

Advanced Search Criteria: Is Active, Is Assigned, Zip Code

<input type="checkbox"/>	Employee Id	Last Name ¹	First Name ²	Branch	Phone	Cell Phone	Email	Is Active	Is Assigned	Last Message	Zip Code
<input type="checkbox"/>	4294973147	Anderson	Erik	Minneapolis	123-456-7890	123-456-7890		<input checked="" type="checkbox"/>	<input type="checkbox"/>	React	55121
<input type="checkbox"/>	4294973156	Anderson	Erik	Minneapolis	123-456-7890	123-456-7890		<input checked="" type="checkbox"/>	<input type="checkbox"/>	React	55121
<input type="checkbox"/>	4295080736	Anderson	Lynn	Minneapolis	(651) 452-0366		lynnanderson4532@...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PerformanceEval	55121
<input type="checkbox"/>	4295037320	Anderson	Solina	Minneapolis	(231) 232-1312	(555) 555-5555	solina@test.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Phone Call	55121
<input type="checkbox"/>	4295080158	Anderson	Susie	Minneapolis	(651) 425-0366		susieanders65342@n...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	React	55121
<input type="checkbox"/>	4295080157	Anderson	Tom	Minneapolis	(651) 452-0366		tomanderson34531@...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Message	55121
<input type="checkbox"/>	4295083192	Andrey	Gonzalez	Minneapolis	3235631244			<input checked="" type="checkbox"/>	<input type="checkbox"/>		55121
<input type="checkbox"/>	12861	Appleseed	Jonathan	Minneapolis	651-830-4830	651-953-3953		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55121
<input type="checkbox"/>	12566	Arce	Marcia	Minneapolis	(651) 183-2183x123		imaedummyaccount...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	React	55121

Rows per page: 50 | 1-50 of 475 | **1** 2 3 4 5 ... 10 >

3. Use the top check box to select all employees or pick and choose the number of employees you would like to assign:

SELECT ALL ACTIONS 475 results

Advanced Search Criteria: Is Active, Is Assigned, Zip Code

<input type="checkbox"/>	Employee Id	Last Name ¹	First Name ²	Branch	Phone	Cell Phone	Email	Is Active	Is Assigned	Last Message	Zip Code
<input checked="" type="checkbox"/>	4294973147	Anderson	Erik	Minneapolis	123-456-7890	123-456-7890		<input checked="" type="checkbox"/>	<input type="checkbox"/>	React	55121
<input type="checkbox"/>	4294973156	Anderson	Erik	Minneapolis	123-456-7890	123-456-7890		<input checked="" type="checkbox"/>	<input type="checkbox"/>	React	55121
<input checked="" type="checkbox"/>	4295080736	Anderson	Lynn	Minneapolis	(651) 452-0366		lynnanderson4532@...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PerformanceEval	55121
<input checked="" type="checkbox"/>	4295037320	Anderson	Solina	Minneapolis	(231) 232-1312	(555) 555-5555	solina@test.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Phone Call	55121
<input checked="" type="checkbox"/>	4295080158	Anderson	Susie	Minneapolis	(651) 425-0366		susieanders65342@n...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	React	55121
<input type="checkbox"/>	4295080157	Anderson	Tom	Minneapolis	(651) 452-0366		tomanderson34531@...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Message	55121
<input type="checkbox"/>	4295083192	Andrey	Gonzalez	Minneapolis	3235631244			<input checked="" type="checkbox"/>	<input type="checkbox"/>		55121
<input type="checkbox"/>	12861	Appleseed	Jonathan	Minneapolis	651-830-4830	651-953-3953		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55121
<input type="checkbox"/>	12566	Arce	Marcia	Minneapolis	(651) 183-2183x123		imaedummyaccount...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	React	55121

3 rows selected | Rows per page: 50 | 1-50 of 475 | **1** 2 3 4 5 ... 10 >

4. Select the "Actions" dropdown and select "Assign":

SELECT ALL 3	
Advanced Search Crite	
Employee Id	
<input type="checkbox"/>	4294973147
<input type="checkbox"/>	4294973156
<input checked="" type="checkbox"/>	4295080736
<input checked="" type="checkbox"/>	4295037320
<input checked="" type="checkbox"/>	4295080158
<input type="checkbox"/>	4295080157
<input type="checkbox"/>	4295083192
<input type="checkbox"/>	12861
<input type="checkbox"/>	12566
3 rows selected	

- Email 3 Recipients
- Log Message for 3 Recipients >
- Make Candidates
- Make Job Offers
- Assign**
- Add to Hotlist
- Merge Record
Select up to 2 records to merge

Onboarding

Assign a New Workflow...
Assign a pre-configured workflow and optionally set the starting step or additional pages.

Assign Pages Ad Hoc...
Assign a manually-specified set of pages that are separate from existing workflows.

5. The "Add New Assignment" wizard will open. Review the information and update any unique start dates:

Add New Assignment - Enter Assignment Information

1 Enter Assignment Information
 2 Assignment Restrictions
 3 Results

Assigning To Job Order:

Angelucci's Flowers - Warehouse
Forklift: 1 of 5 positions filled

Employee:

Roberto Barker (11971)
324723577

 Start Date
 5/15/2019 X

Employee:

Sam Abbott (5412)
832475412

 Start Date
 5/15/2019 X

CANCEL
NEXT >

6. Select Next, the system will double check for any assignment restrictions. Review and submit employee(s):

Add New Assignment - Assignment Restrictions

Enter Assignment Information Assignment Restrictions Results

Assigning To Job Order:

 Angelucci's Flowers - Warehouse
Forklift: 1 of 5 positions filled

Approve All Allowed Assignments

 Roberto Barker (11971)
324723577 Assign This Employee

 Sam Abbott (5412)
832475412 Approve Restrictions For This Employee

Assignment Restrictions

 Employee state (OH) does not match worksite state(MN)
[Angelucci's Flowers - Warehouse](#)

CANCEL < PREVIOUS [SUBMIT 1 ASSIGNMENT](#)

- For more information on assignment restrictions, see [Beyond - Assignment Restrictions](#).

7. The final step will confirm which assignments have been created and allow you to navigate to them by selecting the assignment number:

Add New Assignment - Results

Enter Assignment Information Assignment Restrictions Results

Assigning To Job Order:

 Angelucci's Flowers - Warehouse
Forklift: 1 of 5 positions filled

 Roberto Barker (11971)
324723577 [Assignment Created \(4301406203\)](#)

CANCEL < PREVIOUS [CLOSE](#)

Order Record

Navigate to the order record that requires the assignment and select the "Assignments" tab:

Note If you utilize custom Security Groups with Advanced Permissions, please add the access to the "Assignments" page within Job Order > Assignments to the Security Groups that require the functionality:

BY PAGE BY FIELD Selecting a parent selects children

🔍 assignment ✕

- ▼ Employee (5) Access
- ▼ Customer (3) Access
- ▲ Job Order Access
- ▼ Visifile (3) Page Access
- ▼ Details (2)
- ▼ Candidates (1) Page Access
- ▼ Candidate Matching (1) Page Access
- Assignments** Page Access

For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

Assignment Id	Last Name	First Name	Customer	Department	Status	Job Title	Bill Rate	Pay Rate	Start Date	End Date
4301426437	Abbott	Sam	123 Staffing	Primary	Open	Forklift	38.40	32.00	4/2/2025	
4301426438	Assen	Alexander	123 Staffing	Primary	Open	Forklift	36.00	30.00	4/1/2025	

Select "New Assignment":

Follow the instructions as outlined previously within this article.

Searching for Assignments

You can search for an assignment record by selecting "Assignments" at the left or from within the BMenu > Records > Assignments.

The Assignment Search screen has two options including Basic and Advanced:

Assignment Search

Bookmarks
No bookmarks added.

Recent History

Assignment Search

BASIC

ADVANCED

Last Name: Abbott

First Name

Customer Name

Assignment Id

Employee Id

Status: Active

Branch: All

Service Representative: All

RESET SEARCH

Assignment Advanced Search

Bookmarks
No bookmarks added.

Recent History

Assignment Advanced Search

Assignment Search

BASIC

ADVANCED

Click to select a saved search...

NOT AND OR

Field

RULE / GROUP

SAVE...

RESET SEARCH

Below are some examples of Assignment searches for both search areas. The below example uses the basic search area to do an assignment lookup. The search is looking for an active assignment for employees with the last name "Abbott".

BASIC

ADVANCED

Last Name: Abbott

First Name

Customer Name

Assignment Id

Employee Id

Status: Active

Branch: All

Service Representative: All

RESET SEARCH

26 results

Assignment Id	Last Name	First Name	Customer Name	Department Name	Job Title	Bill Rate	Pay Rate	Start Date
4301426437	Abbott	Sam	123 Staffing	Primary	Forklift	38.40	32.00	4/2/2025
4301408296	Abbott	Zayden	ABC Broom.co	Primary	Clerk-warehouse	13.50	9.00	6/9/2020
4301424363	Abbott	Sam	Angelucci's Flowers	Primary	Forklift	16.15	9.50	3/18/2019
4301407849	Abbott	Zayden	BBW Clothing L	Primary	General Laborer	21.00	15.00	2/19/2020
4301424742	Abbott	Sam	Big Tony's Burger Warehouse	Primary	Welder	29.00	20.00	4/29/2024
4301406988	Abbott	Sam	Blaire's Auto	Primary	General Laborer	29.40	20.00	11/11/2019
4301407096	Abbott	Sam	Bob's Auto Shop	Primary	Forklift	30.00	17.54	11/17/2019
4301406039	Abbott	Zayden	Bork Corp	Primary	Forklift	14.00	10.00	4/5/2019
4301425447	Abbott	Marion	Captain Sham's Sailboat Rental	Primary	Warehouse Worker	19.50	15.00	9/30/2024
4301408349	Abbott	Zayden	Central Perk Packaging	Primary	Picker/Packer	24.00	16.00	7/20/2020
4301419335	Abbott	Tyler	Central Perk Packaging	Primary	Picker/Packer	16.90	13.00	7/19/2020
4301426552	Abbott	Sam	Dewey Cheatum & Howe	Primary	Forklift	30.85	25.00	4/28/2025

Rows per page: 20 1-20 of 26 1 2

The below example uses the Advanced search area to look for all active assignments for the customer 123 Staffing. For more information on searching in Beyond, see [Beyond - Advanced Searching](#).

Click to select a saved search...

NOT **AND** OR

> Active IS TRUE Show in results

> Customer Name CONTAINS 123 Staffing Show in results

+ RULE / GROUP

SAVE... SEARCH RESET

4 results

Advanced Search Criteria: Active, Customer Name

<input type="checkbox"/>	Assignment Id ^{↑2}	Employee Name ^{↑1}	Customer Name	Department Name	Job Title	Bill Rate	Pay Rate	Start Date	End Date	Supervisor	Supervisor
<input type="checkbox"/>	4301426438	Aasen, Alexander	123 Staffing	Primary	Forklift	36	30	4/1/2025			
<input type="checkbox"/>	4301426437	Abbott, Sam J	123 Staffing	Primary	Forklift	38.4	32	4/2/2025			
<input type="checkbox"/>	4301427058	Lasso, Ted	123 Staffing	Primary	Unknown	42	35	9/2/2025			
<input type="checkbox"/>	4301426039	Ronaldo, Cristiano	123 Staffing	Primary	Yard Person Equip.	0	0	1/15/2025		Peterson, Mary	

Related Articles