Beyond - Custom Data

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Custom Data

Beyond has the ability to allow your users to interact with custom data fields that are set up in your system. That means you can track information that isn't normally tracked by Beyond.

Custom data can be tracked for each of the five principal record types: Employee, Customer, Contact, Order, and Assignment.

Note Although Beyond has the ability to view these, they should still be set up in Enterprise. For more info on setup of custom data in Enterprise: How to Set up and Manage Custom Data.

If custom data is set up in your system, viewing/accessing it is easy.

The "Custom Data" Tab

Navigate to the desired record. In the example below, we have found an Employee record. Depending on the size of your screen, you may see the 'Custom Data' tab or you may have to find it by looking at the MORE button to view more options:

VISIFILE DETAILS V DOCUMENTS MESS	AGES STORY MORE 1
^ Snapshot	Assignments
ld 4295080	7507 References
Hire Status Eligible 1	for Hir Pay Setup >
Job Title	Ophearding
^ Note	Onboarding 🖉
No note available	e Check Register
 Contact Information 	Custom Data
(456) 784-1431 Cell Phone	Ē :

Selecting this tab will allow you to see any custom data fields that are available to you as a user.

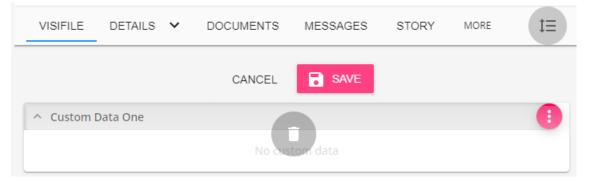
Data that can be seen is defined by your custom data security group. For more info regarding security groups:

Note Some fields may be read only or may be editable based on your custom data security group. This can be identified by a grey pencil button as opposed to a black pencil button.

Registration device	<i>A</i>	
-		
Re-Hire Date	1	

The "Custom Data" Card

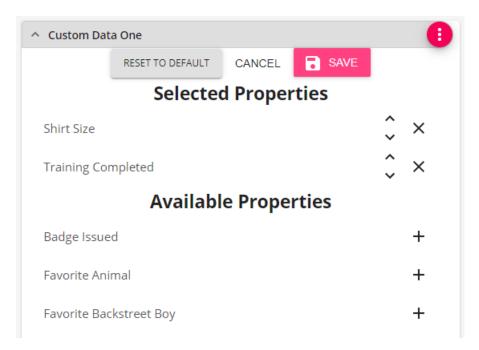
Custom data can also be viewed/edited on a record's Visifile. This can be achieved by adding either the 'Custom Data One' card or the 'Custom Data Two' card to the record's Visifile. To do this, the user must customize their Visifile. For more information: Beyond - The Visifile.



Once the user has added either card to their Visifile, they may customize that individual custom data card. This allows the user to select the individual fields that exist on the card. To do this, select the **i**button:

^ Custom Data One			•
	No custom data	1	Edit
^ Contact Information		F	Customize
(156) 78/ 1/31		_	

Once the customization option is selected, you can see the fields that are selected as well as those are still available. To add a field to the card, select the '+' button adjacent to the field:



Once that item is added to the selected properties, it can be rearranged when compared to the other fields by selecting the 'up' arrow or 'down' arrow:

~ (Custom Data One	
	RESET TO DEFAULT CANCEL	SAVE
	Selected Propert	ties
S	hirt Size	↓ ×
Т	raining Completed	¢×
	Available Proper	ties
В	adge Issued	+
F	avorite Animal	+
F	avorite Backstreet Boy	+
		_
Once the user has adde	d the fields to the card, select the SAVE	button. In addition, the car
to empty by selecting th	ne RESET TO DEFAULT button.	

Now that the 'Custom Data' card has its fields set, the fields can be edited by selecting the 'Edit' button:

^ Custom Data One				0
Shirt Size			Edit	լիդ
Training Completed				0
Favorite Backstreet Boy	Nick Carter	-	Custo	mize

Fields that are editable will be in black and those that are not editable by the user are in gray. Fields that are required will be in red.

Custom Data
Shirt Size
This field is required
Training Completed Safety Onboarding 🗴 🗸
Favorite Backstreet Boy Nick Carter

Adding a URL within the Custom Data field will convert the text to a hyperlink that can be selected once saved to the record:

	Custom Data			
	QA: Employee String WWW.google.com			
	SAVE AS DRAFT	CANCEL	SUBMIT	
QA: Employee Stri www.google.com	ng			

Searching with Custom Data

Custom Data fields can be searched upon within the advanced search of the specific record type.

Fields can be searched either by name or by simply typing "Custom Data" within the search parameter:

E Click to select a saved search									
NOT AND OR									
	>	Is Active	IS TRUE 💌	Show in results					
	>	custom data	^						
+	RULE /	FIELD	CATEGORY						
		Time datalist	Custom Data						
SAVE		Date Datalist	Custom Data						
Search returne Is Active, QA: Emp		woney dataiist	Custom Data						
Employe		Money Datalist	Custom Data		Branch				
4295766		Integer Datalist	Custom Data		High Tech NE				
	42962144	Decimal datalist	Custom Data		High Tech SE				
		Decimal Datalist	Custom Data						

URL's that have been added to Custom Data fields will appear as selectable hyperlinks within the search results:

≣	Click to select a s	aved search								^
	NOT AND C)R								
=	> Is Active		IS TRUE 👻	Show in results						×
=	> QA: Empl	oyee String	CONTAINS -	Google		Show in results				×
+ •	RULE / GROUP									
SAVE.						=				RESET SEARCH
	returned 2 resu , QA: Employee Sti									ط
	Employee Id	Last Name 🛧	First Name 🛧	Branch	Phone	Cell Phone	Email	Is Active	Is Assigned	QA: Employee String
	4295766892	Abbott	Alexzander	High Tech NE				~	\oslash	www.google.com
	4296214441	Murphy	Conor	High Tech SE	6514851842		conorm185@gmail.com	\checkmark	\checkmark	www.google.com
									owsperpage: 20 💌	1-2 of 2 < 1 >

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