

Beyond - Customer Frequently Asked Questions

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What is Beyond?

TempWorks Beyond™ is a comprehensive mobile applicant tracking system (ATS) and customer relationship management (CRM) browser-based solution offered for the staffing industry. It allows you to access your applicant & customer records from any device connected to the internet while utilizing a web browser (for more information on logging in see [Beyond: How to Log In](#)).

Q: Am I able to email invoices to a customer in Beyond?

Answer: While invoices are unable to be emailed from within Beyond, the setup for emailing invoices is able to be completed within Beyond. Navigate to Invoice Setup > Billing Setup section on a Customer record to set them up for emailing. They need to have email or print & email option as their invoice method and have at least one invoice recipient listed.


The screenshot displays the 'Customer Record' interface for 'Last Chance General Store - Primary'. The top navigation bar includes 'VISIFILE', 'DETAILS', 'DEFAULTS', 'DOCUMENTS', 'INVOICE HISTORY', 'MESSAGES', and 'MORE'. The 'Actions' section shows 'Invoice Setup' (set to 'Invoice department separately') and 'Parent Customer' (set to 'Last Chance General Store - Primary'). The 'Invoicing' section includes 'Style', 'Invoice S Type', 'Invoice Method' (highlighted with a red box and set to 'Print and Email'), and 'Email Template' (set to 'Invoice to Contact'). The 'Invoice Recipients' section lists 'Andrew Johnson (Owner)' with email 'andrew@lastchance.xom' (highlighted with a red box). A red box also highlights the 'Invoice Method' field in the 'Invoicing' section.



Note Invoices are still processed and emailed via Enterprise. See [How to Email Invoices](#) for more information.




Q: Why aren't all of the contacts and messages displayed on the visifile?


Answer: If you have more than 5 contacts or messages you can view more by selecting the option at the bottom of each card:


^ **Contacts**

 **Bean, Jim (11454)**
CEO


 **Ben, Jerry (11458)**
Account Recievable
 (801) 555-1234

 **Burton, Hal (11159)**
AP
 (651) 651-5510  H.Burton@xip.xom


 **Dale, Jones (11456)**
Accounts Payable

 **Daniels, Jack (11194)**


[MORE CONTACTS \(Showing 5 of 15\)](#)

^ **Messages** 


APRIL 2019

FollowUp · Apr 30th, 10:42 AM · Amelia Stout
Waiting for Confirmation from Mia 


MARCH 2019

FollowUp · Mar 13th, 2:01 PM · Amelia Stout
follow up next week about potential orders 

DECEMBER 2018

Lunch · Dec 28th, 3:16 PM · Amelia Stout
Joe and I talked about a few future orders. looking for a lot of forklif... 

NOVEMBER 2018

Message · Nov 9th, 10:59 AM · Amelia Stout
Still under credit check - do not assign employees until you talk to p... 

[GO TO MESSAGES PAGE](#)

Q: Where can I find all of the open orders for a customer?

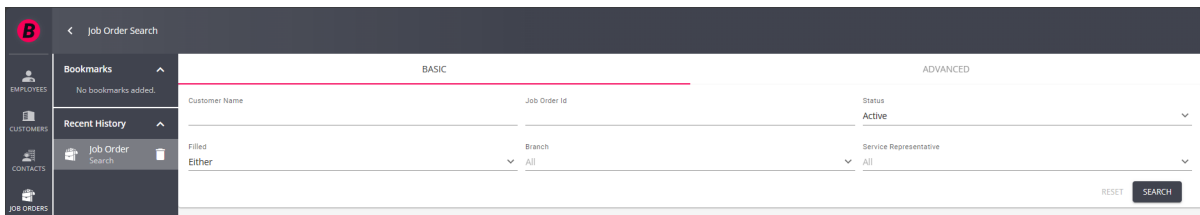
Answer: There are 2 locations where you can view customer orders:

1. Add the Unfilled Orders card to the Visifile of the customer record:



To learn more check out [Beyond - The Visifile](#).

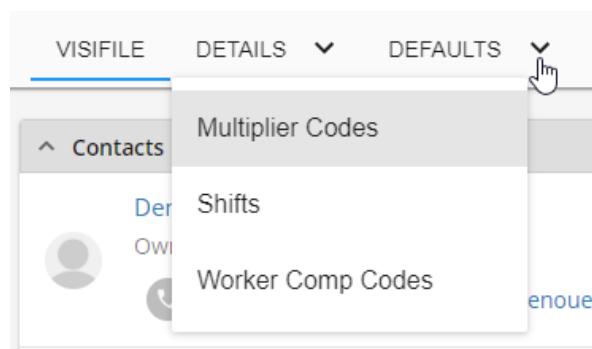
2. Search for unfilled, active orders by customer under order search:



To learn more about searching, check out [Beyond- Job Order Status and Searching](#).

Q: Where do I enter a negotiated mark up for a customer?

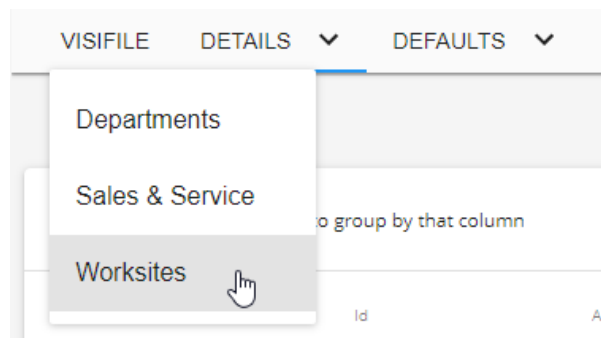
Answer: Navigate to the Defaults tab of the customer record and choose Multiplier Codes. Select the + to add the mark up or multiplier code to the customer record.



To learn more check out [Beyond- Customer Defaults](#).

Q: Do we need to create a separate worksite for each location we send an employee to?

Answer: Yes, because local taxes can differ from location to location we advise that you create a worksite under customer details for each site you send your employees to. These worksites will then flow into future order records for that customer.



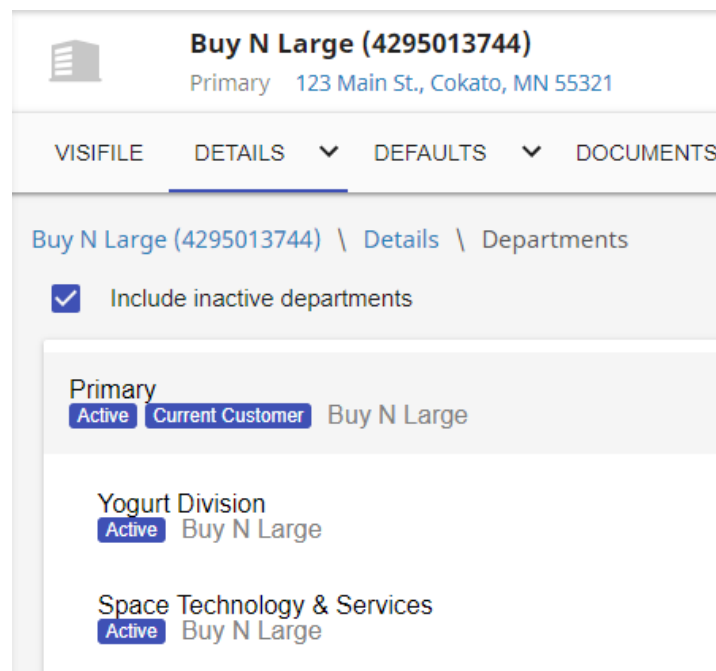
See [Departments vs. Worksites](#) for more information.

Q: The customer requests to have the invoice sub-totaled by department, how is this set up?

Answer: This is a 2 step process.

Step 1: Create Departments.

If you have not already created departments for your customer, navigate to the details > departments section and add a new department.



To learn more see [Beyond - Departments vs Worksites](#).

Step 2: Under Invoice Setup > Billing Setup, choose the separate invoices by department option.

Parent Customer Billing Frequency

Separate Invoices


<input type="checkbox"/> Assignment	<input type="checkbox"/> Branch	<input type="checkbox"/> Cost Center
<input checked="" type="checkbox"/> Department	<input type="checkbox"/> Division	<input type="checkbox"/> Employee
<input type="checkbox"/> Job Order	<input type="checkbox"/> Job Title	<input type="checkbox"/> PayCode
<input type="checkbox"/> Purchase Order	<input type="checkbox"/> Shift	<input type="checkbox"/> Sub Entity
<input type="checkbox"/> Supervisor	<input type="checkbox"/> Weekend Date	<input type="checkbox"/> Worksite

SAVE AS DRAFT CANCEL SUBMIT

See [Beyond- How to Manage Billing Setup](#) for more information.

Q: When should I use the 'Separate Invoices' section?


Answer: Anytime your customer needs invoices separated by certain criteria you can utilize this card under Invoice Setup > Billing Setup.

^ Separate Invoices 			
Assignment	No	Branch	No
Cost Center	No	Department	Yes
Division	No	Employee	No
Job Order	No	Job Title	No
PayCode	No	Purchase Order	No
Shift	No	Sub Entity	No
Supervisor	No	Weekend Date	No
Worksite	No		

See [Beyond- How to Manage Billing Setup](#) for more information.

Q: How can I track where a customer is in my sales process?

Answer: Utilize the Sales Pipeline status to track sales progress. This information is found under Details > Sales & Service on a customer record. Here you can track sales step, percent complete to sale, sales contact, and estimated value. These fields are searchable and able to be reported on.

^ Sales Pipeline 	
Pipeline Status	Proposal Sent
Percent Complete	70%
Sales Contact	Smith, Mia
Estimated Value	1,000.00 Weekly

If you have not set up your sales pipeline status options yet, you will need to do this from within Enterprise. See [How to Set up Sales Pipeline Statuses](#) for more information.

Q: Where can I see a list of assignments related to this customer?

Answer: You can see a list of current assignments for a customer by adding the Assignment card to the customer visifile.

^ Assignments

-  **Marvin Android**
● Open
15.00 pay rate / 18.51 bill rate
-  **Jeremy Jackson**
● Open
16.00 pay rate / 24.00 bill rate
-  **Adam West**
● Open
15.00 pay rate / 18.51 bill rate

OR by searching assignments by customer name and status:

BASIC				ADVANCED					
Last Name	First Name	Customer Name	Assignment Id	Employee Id	Status	Branch	Service Representative		
		Bucky			Active	All	All		
RESET SEARCH									
39 results ↓									
<input type="checkbox"/>	Assignment Id	Last Name	First Name	Customer Name ↑	Department Name	Job Title	Bill Rate	Pay Rate	Start Date
<input type="checkbox"/>	4301424422	Seller	Monica	Bucky's Shipping	Primary	Assembler	25.00	20.00	2/25/2024
<input type="checkbox"/>	4301424439	Keller	Rex	Bucky's Shipping	Primary	Assembler	26.00	23.22	3/3/2024
<input type="checkbox"/>	4301424440	Onefeather	Bob	Bucky's Shipping	Primary	Assembler	26.00	23.22	3/3/2024
<input type="checkbox"/>	4301424442	Doe	John	Bucky's Shipping	Primary	Assembler	37.83	25.22	3/4/2024
<input type="checkbox"/>	4301424444	Smithers	Semmy	Bucky's Shipping	Primary	Assembler	26.00	23.22	3/6/2024

To learn more check out [Beyond - The Visifile](#).

Q: What information needs to be completed on the customer record before orders can be created?

Answer: This depends on what information your company wants to gather. Every staffing company can have different sets on information needed based on their processes.

Here are a few things we recommend:

1. Worksites: If a customer sends employees to different locations, those locations should be documented on the customer record so they can be selected on the correct order. This ensures employees' local taxes are being calculated correctly.

Name	Id	Active	Street 1	Street 2	City	State	Zip Code	Accrual Loc...
Bloomington	18308	✓	8717 SANDR...		BLOOMING...	MN	55438-1228	
Chanhassen	18420	✓	1234 BUCK...		CHANHASSEN	MN	55438	
Crystal	18482	✓	123 ILOKA ...		CRYSTAL	MN	55438	
Disco Center	19268	✓	8724 SANDR...		BLOOMING...	MN	55438	
Eagan	18309	✓	3140 NEIL A...		EAGAN	MN	55121-2272	
Edina	18424	✓	1235 BLVD ...		EDINA	MN	55413	






For more information on worksites, see [Beyond - Departments vs Worksites](#).

2. Sales & Service Information: If you are entering and tracking sales information for prospects, utilize the sales & service section of the customer record to show where in the sales process a customer is.

VISIFILE	DETAILS	DEFAULTS	DOCUMENTS	INVOICE HISTORY	MORE
^ Sales Information					
Account Manager	Amelia Stout	Sales Team	Default		
How Heard Of	--	Business Code	--		
How Heard of Detail	--	Competition	--		
^ Sales Pipeline					
Pipeline Status	Proposal Sent	Percent Complete	70%		
Sales Contact	Smith, Mia	Estimated Value	1,000.00 Weekly		
^ Job Order Defaults					
PO Number	--	Supervisor	--		
Cost Center	--	Burden	--		
Sub Entity / Dept	--	Location	--		
Check Delivery	D	Customer Extra 1	--		
Customer Extra 2	--	Customer Extra 3	--		

For more information see [Beyond - Managing Sales and Service](#).

3. Invoice Setup: In order for customers to properly get billed, they need their billing preferences marked under invoice setup > billing setup.

VISIFILE	DETAILS	DEFAULTS	DOCUMENTS	INVOICE HISTORY	MORE
^ Actions					
Invoice Setup	Invoice department separately				
Parent Customer	Independence Inn - Primary				
^ Invoicing 					
Style	Invoice S Type	Invoice Method	Print and Email		
Email Template	Invoice to Contact				
^ Invoice Recipients 					
=	George Anderson (Manager) g.anderson@xip.xom				
=	Mia Smith (Owner) mia.smith@ininn.xom				
^ Billing Schedule 					
Billing Frequency	Weekly	Bill On...	--		
Invoice Notes	--				

Don't forget to enter the billing address on the details tab.

For more information on invoice setup see [Beyond- How to Manage Billing Setup](#).

See [Beyond - Customer Record Must-Haves](#) for a more detailed list of fields to fill out on the customer record.

Related Articles