

Beyond - Filling out Customer Related Forms

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What is a Service Rep Only Workflow?

Service rep only workflows are able to be assigned on the customer record. These workflows allow you to assign and edit preset forms that sales or account management can fill out for a particular customer.

For example, generating a quote, creating a contract, or filling out a safety form. The service rep will fill out any required fields on the preset forms and then the final document(s) will be saved on the customer record.

Note This functionality requires HRCenter™ & Beyond™ access. If you are not currently using either of these products, talk to your account manager today.

In order to utilize a service rep only workflow, you must first build your forms and workflow via HRCenter Admin. Check out [How to Create a Service Rep Only Workflow](#) for more information.

How to Utilize a Service Rep Only Workflow

Once a Service Rep Only Workflow is created, any sales or account manager can assign a workflow for themselves or another rep to fill out.

This article covers:

1. [How to Assign the Workflow](#)
2. [How to Fill out the Forms](#)
3. [Next Steps](#)

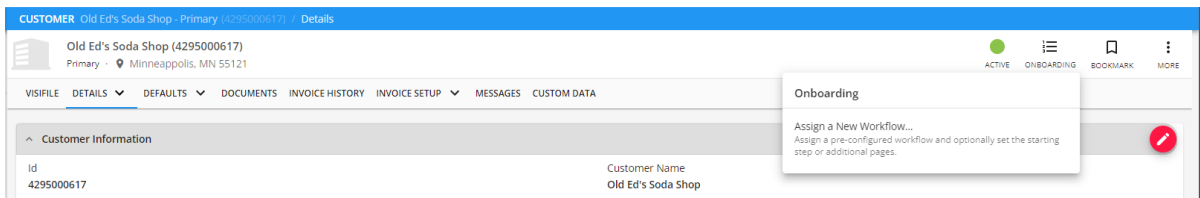
Assign the Workflow

1. In Beyond, navigate to the customer record you want to fill out a form for:

The screenshot displays the 'Customer Information' section of a CRM interface. The customer name is 'Old Ed's Soda Shop (4295000617)' and the location is 'Minneapolis, MN 55121'. The status is 'Active'. A red circle highlights a button in the top right corner of the information panel, which is used to assign a new workflow.

Field	Value
Id	4295000617
Customer Name	Old Ed's Soda Shop
Department Name	Primary
Parent	--
Website	--
Branch	High Tech NE
Status	Active >
Activation Date	6/21/2019

2. Select the Onboarding charm and select "Assign a New Workflow":



3. Fill out the following Information:

Assign Onboarding Workflow

1 Select a Workflow 2 Choose Pages

Choose a workflow to assign to **Amelia Stout**

Service Rep	Amelia Stout	X	▼
Tenant	tworks-qa		▼
Workflow	Customer Document Examples		▼
Start at Step	Customer Agreements		▼
Language	English		▼

CANCEL [NEXT >](#)

- Select the Service Rep who should fill out the form
- Select the Tenant
- Select the Workflow created by your HRCenter Admin
- Select the Starting Step from the drop down
- Select the Language (if applicable)

4. Click on Next to continue

5. Select Pages:

Assign Onboarding Workflow

Select a Workflow

2 Choose Pages

Choose a workflow to assign to **Amelia Stout**

Show all

2 SELECTED PAGES

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> AS Customer Quote 2019	Form Blocks
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> AS Worksite Safety Form 2019	Form Blocks
<input checked="" type="checkbox"/>	11011 Custom Form Emp	Form Blocks
<input checked="" type="checkbox"/>	13038 test	Form Blocks
<input checked="" type="checkbox"/>	13218	Form Blocks
<input checked="" type="checkbox"/>	13218 Test	Form Blocks
<input checked="" type="checkbox"/>	2019 ACA Health Insurance Application	Form Blocks
<input checked="" type="checkbox"/>	2019 W4	Form Blocks
<input checked="" type="checkbox"/>	Accordion Education	Info Blocks
<input checked="" type="checkbox"/>	Accordion Education All Required	Info Blocks
<input checked="" type="checkbox"/>	Accordion Education Hidden	Info Blocks
<input checked="" type="checkbox"/>	Accordion References	Info Blocks

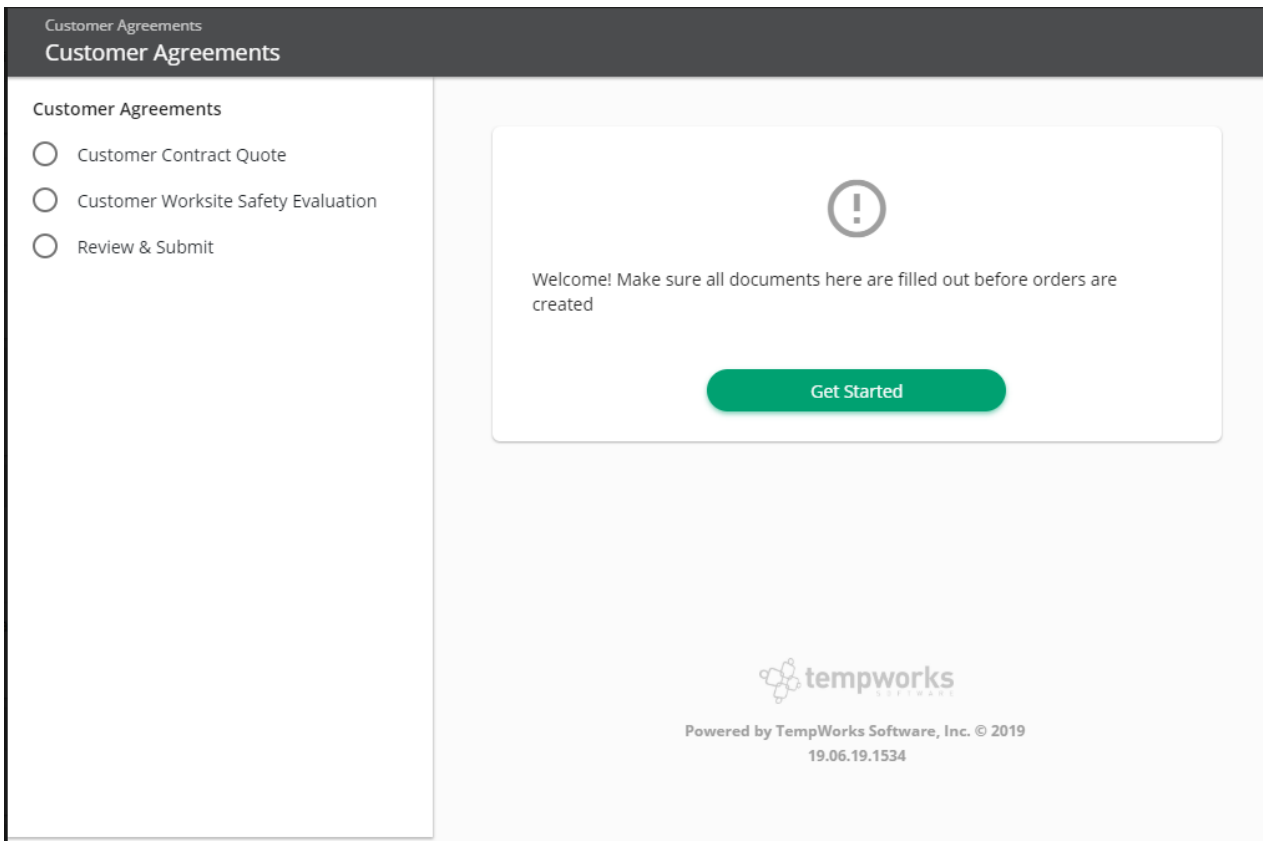
CANCEL < PREVIOUS SUBMIT

- The pages included in the workflow will already be selected. Click on any additional forms you would like to include

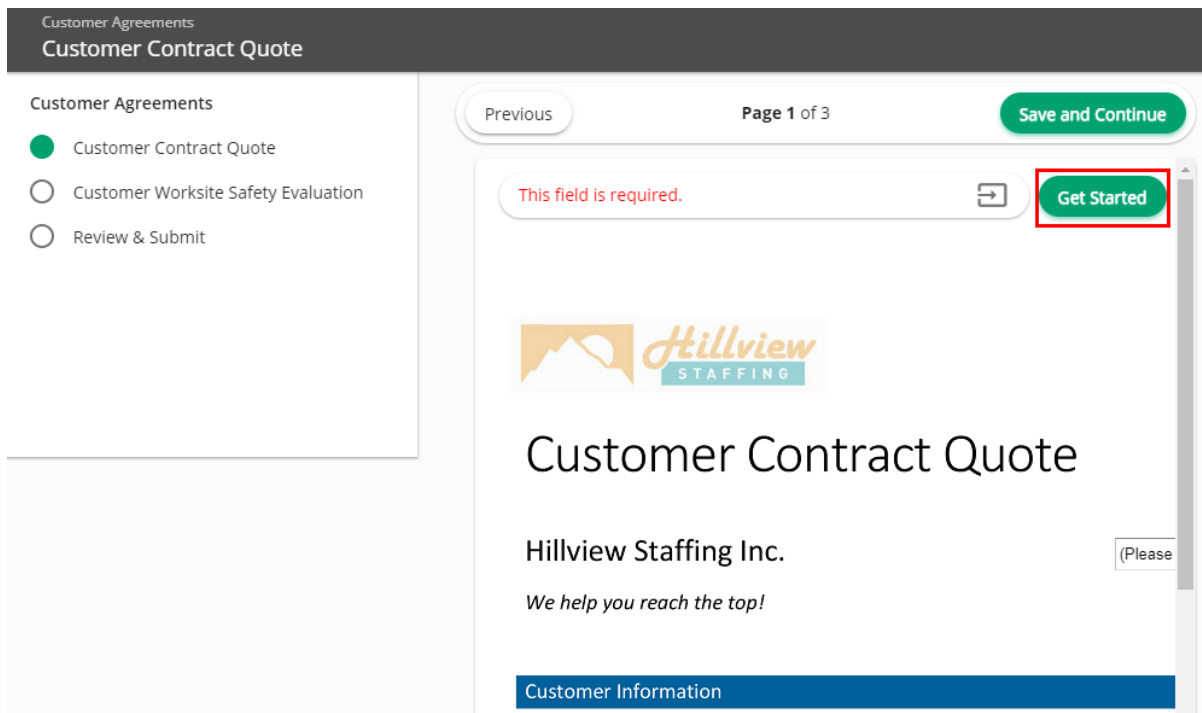
6. Select Submit

Fill out the Form(s)

Once you have submitted the form, if you are the assigned rep, you will be redirected to HRCenter to fill out the forms. If you are not ready to fill out the forms yet, you can close the window and log into HRCenter later with your [Service Rep Credentials](#) from your Admin. You may also receive a generated email from HRCenter letting you, or the assigned person, know that a new form is ready to be filled out.




1. Select Get Started to begin
2. Review the form
3. Select Get Started to be directed through the required fields or click on any specific field to begin filling it out:



4. Once all necessary fields have been filled out, select Save and Continue:

Customer Contract Quote ▾

Next Field 

Customer Contract Quote

Hillview Staffing Inc. Branch 1

We help you reach the top!

Customer Information

Name: Corporate Address:
Phone:

Quote Details:

Job Title:

Worksite Location:

Number of People Needed: Estimated Number Of Hours (per week):

Rates Per Hour:

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Save and Continue

5. Some forms may have required documents that you need to upload with the form. In this example, perhaps a job description or email from the client that you want attached with the quote:

Attach Documents ▾

Number of documents required: 0
Maximum number of documents: 1

Drop files here, paste or [browse](#)

This form requires additional documents to be attached. Please upload a scan or photo of these documents in one of the following formats: .jpg, .png, .gif, .pdf

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Save and Continue

- The number of required documents will be displayed at the top.
 - If there are no required documents or you have uploaded the necessary documents, select Save and Continue
6. If the form requires a signature from the service rep, you will be directed to type your name and select Save and Continue to confirm that everything included is true and accurate to your knowledge:

I hereby confirm that I have read and understand all of the information included on "Customer Contract Quote". All information is true and accurate to my knowledge.

Please enter your full name as your signature.

Service Rep Name Here

7. Once all forms included in the workflow have been completed, you will be asked to review all information entered before submitting. Once you have submitted you will no longer be able to edit the forms:

8. Once you have submitted the forms, you will be given the option to download the newly created forms:

Thank You

Thank you for completing the customer forms. Forms will be available to be downloaded from the customer record.

You may also review the documents that were generated with your signature to make sure they are accurate:

- [Customer Contract Quote_255650](#)
- [Customer Worksite Safety Evaluation_255651](#)

You may also download all documents that were generated with your signature to keep for your records:

[Download All Documents](#)

9. Once completed, click anywhere outside the HRCenter window to resume your Beyond session.

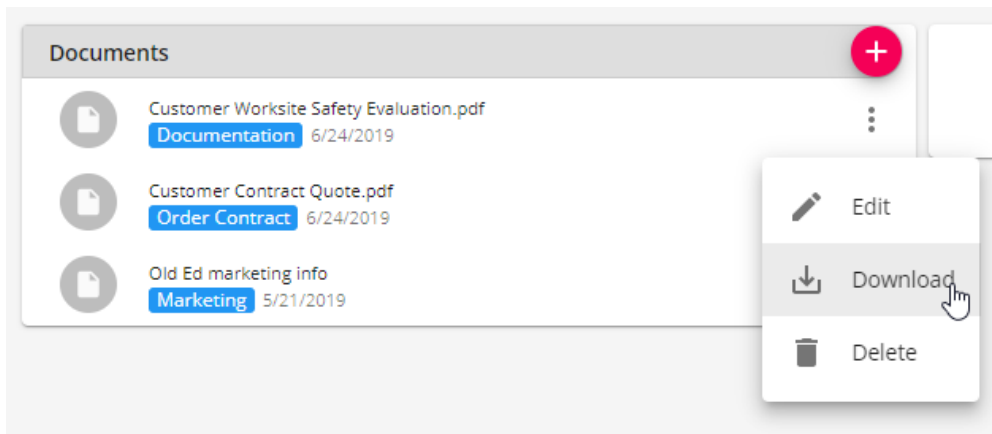
Next Steps

Once the forms have been assigned, filled out, and submitted, they will be available on the customer record under documents:

The screenshot shows a software interface for a customer record. At the top, a blue header bar reads 'CUSTOMER Old Ed's Soda Shop - Primary (4295000617) / Documents'. Below this, the customer name 'Old Ed's Soda Shop (4295000617)' is displayed with a location pin icon and the address 'Primary · Minneapolis, MN 55121'. A navigation menu includes 'VISIFILE', 'DETAILS', 'DEFAULTS', 'DOCUMENTS' (which is selected and underlined), and 'INVOICE HISTORY'. The 'Documents' section is expanded, showing a list of three documents with a red '+' icon in the top right corner. Each document entry includes a document icon, the filename, a category label in a blue box, and the date.

Document Name	Category	Date
Customer Worksite Safety Evaluation.pdf	Documentation	6/24/2019
Customer Contract Quote.pdf	Order Contract	6/24/2019
Old Ed marketing info	Marketing	5/21/2019

Select the Download option under the Actions menu to download a copy of the document in order to email or print out for the customer:



Related Articles
