

Beyond - How to Mass Update Assignments

Last Modified on 09/18/2025 9:48 pm CDT

In certain scenarios, it is beneficial to update information for multiple assignments. This across-the-board update is especially helpful when multiple assignments are ending on the same day, statuses need to be updated, and/or messages need to be logged. Assignments can be updated, en masse, from the assignment search in Beyond™.

Looking to learn more about ending an assignment record? Check out [Beyond - How to End an Assignment](#)

Note In order to access this functionality within Beyond, you will need to be a member of a Permission Security Group that contains the 'mass-update-assignments' permission. For more information about security permissions see [Beyond - Managing Security Groups](#).

If you are unable to access this functionality, please reach out to your administrator.

Mass Update Assignments

When you are ready to update multiple assignments at once, use the following instructions to mass end or update assignment records at once.

1. Navigate to an assignment search and search for the records you want to update.
 - For more information on searching, check out [Beyond - Advanced Searching](#)
2. Select the assignments from the search results that you want to update:

BASIC				ADVANCED					
Last Name	First Name	Customer Name	Assignment Id	Employee Id	Status	Branch	Service Representative		
Abbott		Peppermint			Any	All	All		
								RESET	SEARCH

SELECT ALL

ACTIONS

17 results

	Assignment Id	Last Name	First Name	Customer Name	Department Name	Job Title	Bill Rate	Pay Rate	Start Date
<input checked="" type="checkbox"/>	4302385434	Abbott	Alexander	Peppermint Twist	Primary	Unknown	15.00	11.00	9/22/2023
<input checked="" type="checkbox"/>	4302385445	Abbott	Alexander	Peppermint Twist	Primary	Unknown	15.00	11.00	9/22/2023
<input checked="" type="checkbox"/>	4302385446	Abbott	Alexander	Peppermint Twist	Primary	Unknown	15.00	11.00	9/22/2023

3. Right click or select the search actions menu and choose Mass Update Assignments Option:

BASIC

Last Name

Abbott

First Name

Customer Name

Peppermint

Assignment Id

Employee Id

Status

Any

Branch

All

Service Representative

RESET

SEARCH

SELECT ALL

ACTIONS

Assignment Id

4302385434

4302385445

4302385446

4302385470

Email

Log Message for 3 Recipients

Mass Update Rates

Mass Update Assignments

Assign a New Workflow...

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

17 results

4. A new window will open with the following fields you can update en mass:

Active

All

Mass Update Assignments

1 Select Status

2 Update Assignments

Update 3 Assignments and log a message.

* Status

* Message Action

Performance Note

End Date

Estimated End Date

Customer DNA

SAVE AS DRAFT

CANCEL

NEXT >

- Status (required) - New status that the assignment(s) will receive
- Message Action - Type of message that will be logged on the assignment(s)
- Performance Note - Note that will be added within the message logged on the assignment(s)
- End Date - Actual end date that the assignment(s) will receive
- Expected End Date - Expected end date that the assignment(s) will receive
- Customer DNA - Check this if the customer does not want the employee to work for them in the future

5. Once all of the information has been added that will be updated, select 'Next':

Active

Mass Update Assignments

1 Select Status ————— 2 Update Assignments

Update 3 Assignments and log a message.

* Status * Message Action

Complete Message

Performance Note

Assignments have been completed and the work was done to the standards of the customer.

End Date Estimated End Date

3/29/2024 X


☐ Customer DNA


SAVE AS DRAFT CANCEL NEXT >


6. Select 'Submit' to verify the updating of assignments:

Mass Update Assignments

✓ Select Status ————— 2 Update Assignments

 Alexzander Abbott: Unknown

 Alexzander Abbott: Unknown


 Alexzander Abbott: Unknown


SAVE AS DRAFT CANCEL < PREVIOUS SUBMIT


7. The assignments will then be updated with green checkmarks to show your changes have been made:

Mass Update Assignments

✓ Select Status ————— 2 Update Assignments

 Alexzander Abbott: Unknown ✓

 Alexzander Abbott: Unknown ✓

 Alexzander Abbott: Unknown ✓

DONE

8. Click 'Done' and navigate to one of the updated assignments to see the information changed along with a message (if chosen to be added) to see all of the information that has been updated:

Alexander testrrrr Abbott (4302385434)
Peppermint Twist · Unknown

Active Reports Onboarding Tasks Sync To Sense Bookmark More

Bookmarks
No bookmarks added.

Recent History
Alexander ...
Assignment Search

VISIFILE DETAILS DOCUMENTS MESSAGES CUSTOM DATA ASSIGNMENT CUSTOM CONTENT

Snapshot

Assignment Id 4302385434	Status Complete >
Employee Id 4295017595	Job Order Id 4295050629
Branch High Tech NE	Temp Phone --
Pay Rate 11.00	Bill Rate 15.00
Employer High Tech & Staffing Services, Inc	Gross Profit Calculator >

Messages

TODAY

Message - Apr 3rd, 3:48 PM
Mass Update Assignment: Status: Complete Estimated End Date: -- Performance Note: Assignments have been completed and the work was done to the standards of the customer.

joshua.kramer

In the event that you need to navigate away from this process before submitting the changes, you have the option to save your progress as a draft to be continued at a later time.

To do this, click on 'Save as Draft' at the bottom left corner of the window. You will then see the draft is saved at the top left corner of the Activity Panel. Once back within the saved draft, you will have the added options of updating or deleting the draft:

Mass Update Assignments

1 Select Status 2 Update Assignments

Update 3 Assignments and log a message.

* Status
Complete

* Message Action
Message

Performance Note

End Date Expected End Date

☐ Customer DNA

SAVE AS DRAFT CANCEL NEXT >

Remember that drafts will not persist after you have refreshed or closed your browser window.

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