Beyond - Welcome to Administration

Welcome to Beyond Administration!

This article was created for those who have Administration permissions for Beyond.

Security Groups & Service Reps

Looking to manage security permissions or users? Check out Beyond - Managing Your Service Representatives for full instructions

Note that Security Roles in Enterprise is separate from Security Groups in Beyond.

Teams

In Beyond, teams allow you to assign tasks, create dashboards, and share searches with different groups of service reps. To set up teams, you will need to first group your users by job title, region, or any other division that makes sense for your division. There is no limit to the number of teams you can create. There is also no limit to the number of teams any service rep can be apart of.

Check out Beyond - Creating & Managing Service Rep Teams for instructions.

Additional System Configurations

Beyond has a few additional configuration options available for you to turn on with help from a TempWorks representative. To learn more check out the options below.

Options Available:

- [Beyond - Address Standardization](< /li>)< /li>

- [Beyond - Status Change Workflows](< /li>)< /li>

Additional Admin Options

Looking for more administration options? Want to customize some drop downs? Beyond is tied to our Enterprise System so there are additional administration settings you can change and customize that are in Enterprise. Any administration updates for drops downs including message action codes, interest codes, job titles, etc. that are updated in Enterprise will automatically update Beyond too.

Check out the following articles for more information:

- [Administrator Manual](< /li>)< /li>

- [Creating Multiplier Codes](< /li>)< /li>

- [How to Utilize the Sales Pipeline](< /li>)< /li>

- [How to Set up and Manage Custom Data](< /li>)< /li>

> *Note* Security Settings, Tasks, hot lists, and rate sheets do not currently transfer into Beyond.

Related Articles