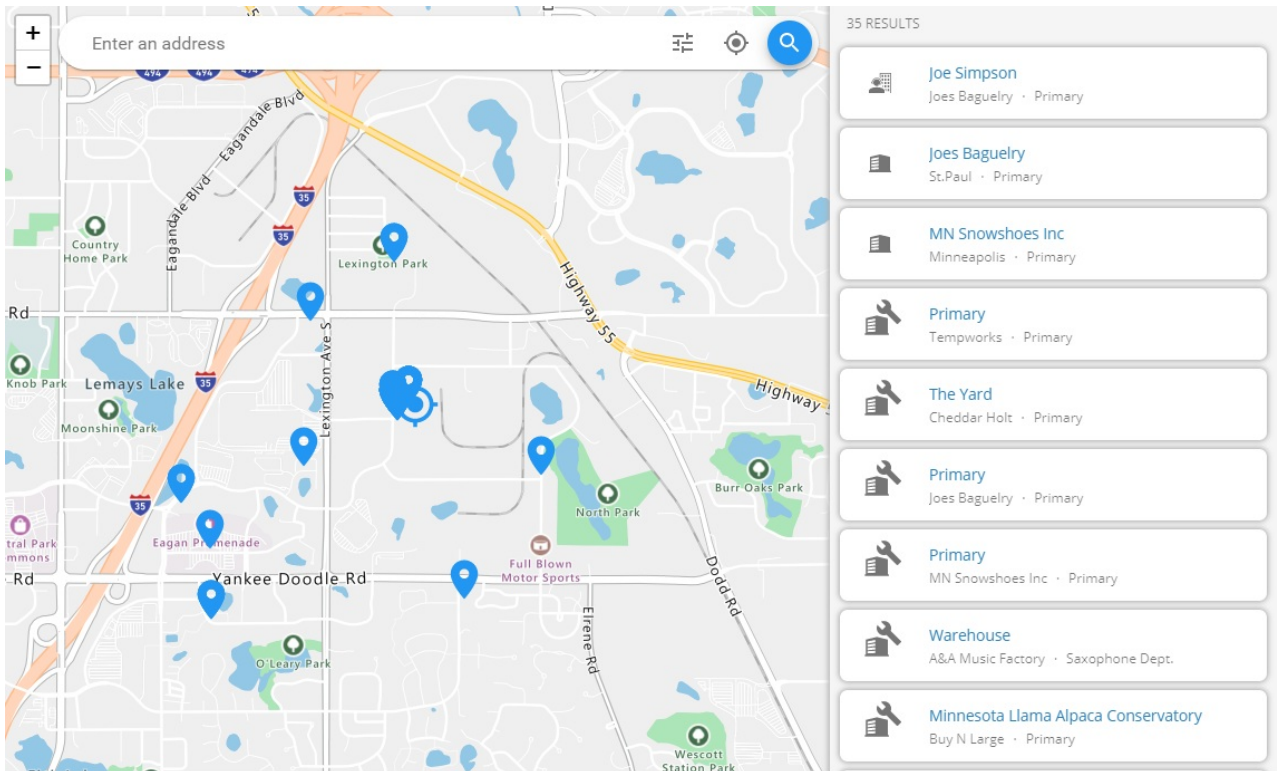


Beyond - Utilizing the Near Me search

Last Modified on 04/18/2024 3:43 pm CDT

What is the Near Me search?

The Near Me search option in Beyond allows you to search for all your Customers, Contacts, or Worksites that are located in a specific area. This is a great sales resource for planning and finding nearby prospects or current clients that you can visit while you are in a specific area.



The Near Me search allows you to narrow down by pipeline status, account manger, and more!

Note The Near Me search functionality may require additional setup. If you do not see the Near Me search option in Beyond, contact your TempWorks Account Manager for more information.

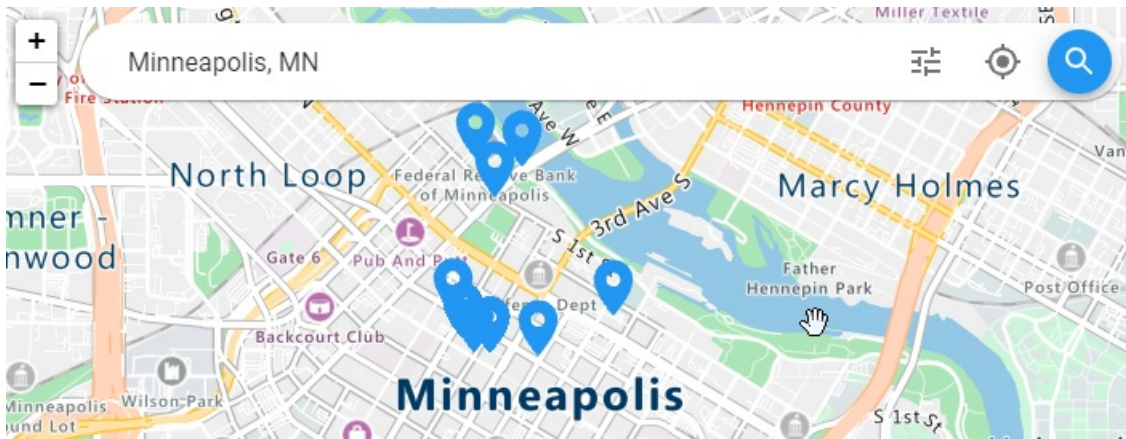
How To Use the Near Me search

The Near Me search is found within B Menu > Records > Near Me:

The Near Me search will automatically search by your location as long as Beyond has permission from your device's location services.

Tips:

- Type in a city, state or full address that you are looking to travel to or drag the map to change locations



- Use the + and - buttons in the upper left to zoom in and out
- Use the location pin button left of the magnifying glass to return to your location, after searching for a different location.
- Use the list button to filter your results by account manager, customer status, or pipeline status.

Filters

Account Manager

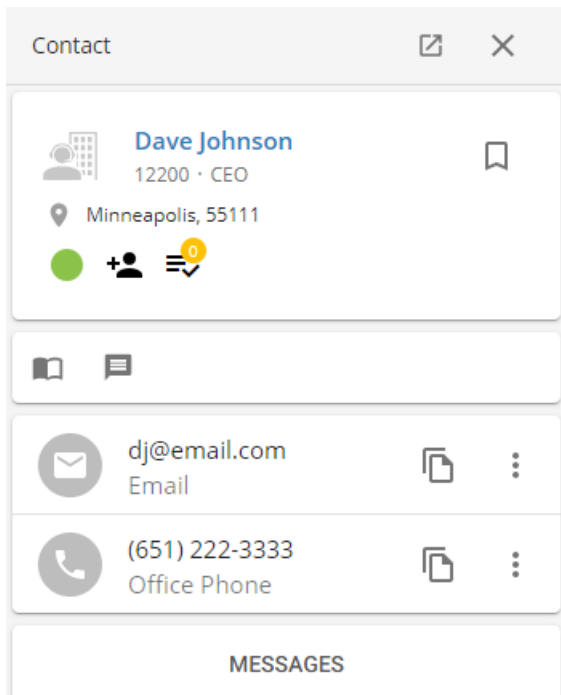
Customer Status

Pipeline Status

- Show Customers
- Show Contacts
- Show Worksites

CANCEL SEARCH

- Tap on a result to see a quick view of the record including applicable contact information and messages



Click on the name in the quick view to be brought to the related record.

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