

Beyond - Utilizing the Near Me search

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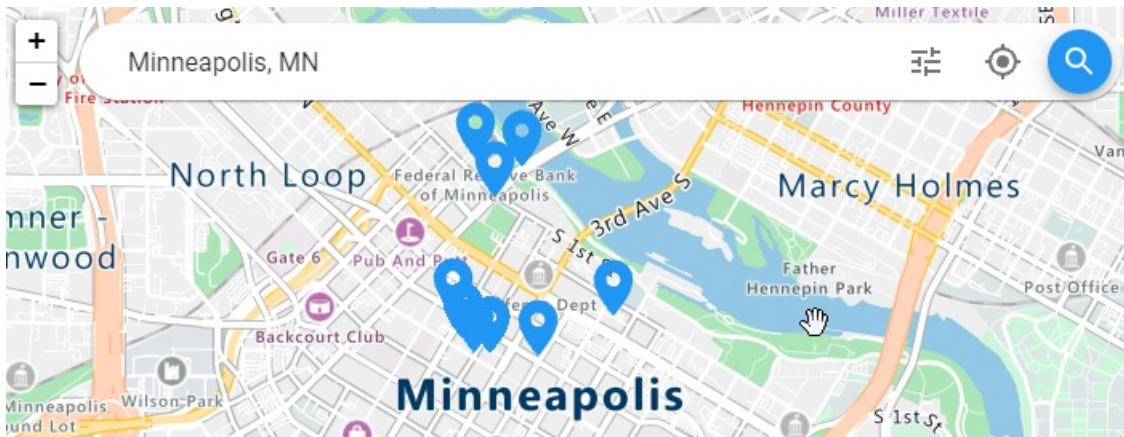
What is the Near Me search?



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 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  button left of the magnifying glass to return to your location, after searching for a different location.
- Use the  button to filter your results by account manager, customer status, or pipeline status.

Filters

Account Manager

Customer Status

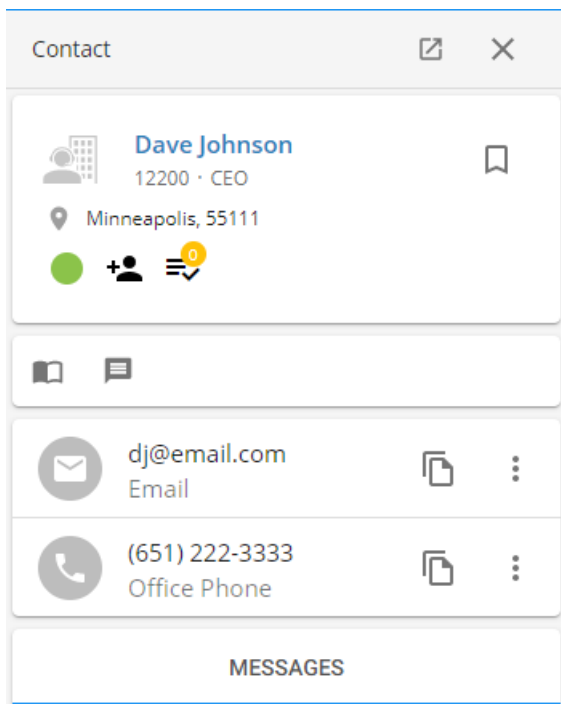
Pipeline Status

- 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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