

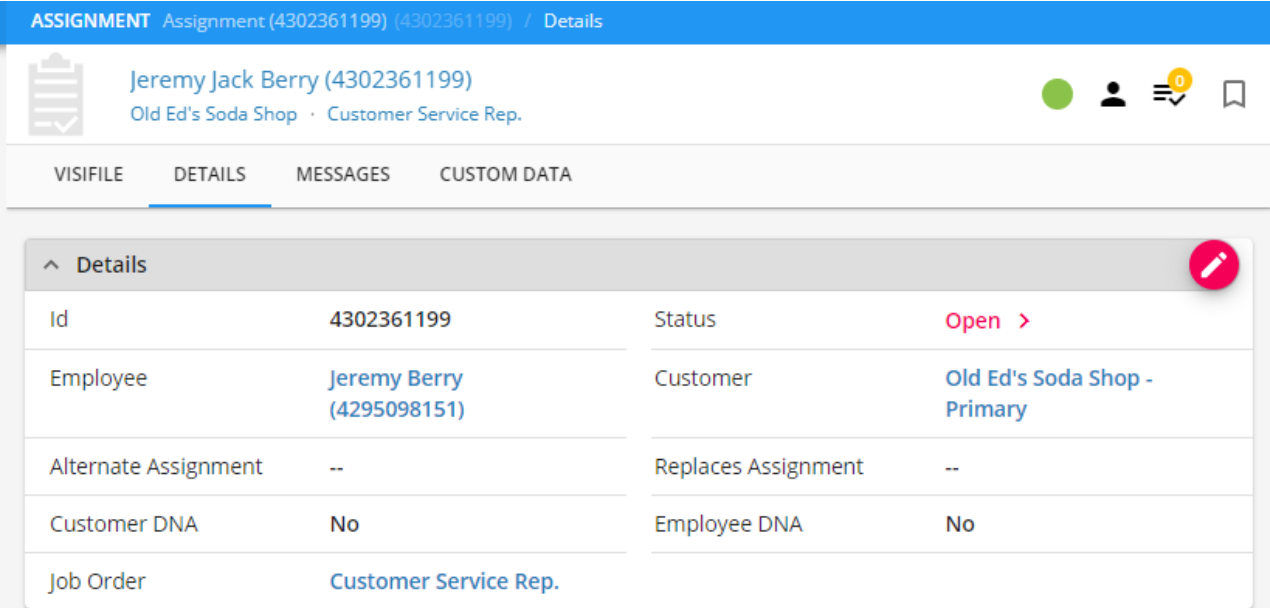
Beyond - Assignment Details Overview






Last Modified on 08/12/2021 3:39 pm CDT

What is an Assignment Record?

An assignment record is the fulfillment of a job order for a customer. When a customer places an order for employees, it is the recruiters responsibility to create an assignment record for every employee intended to be placed on the order. This will help track placement history of each employee and create a timecard for this employee each week.

Need to create an assignment? Check out [Beyond - How to Create an Assignment](#) for more information.



ASSIGNMENT Assignment (4302361199) (4302361199) / Details			
Jeremy Jack Berry (4302361199) Old Ed's Soda Shop · Customer Service Rep.		   	
VISIFILE DETAILS MESSAGES CUSTOM DATA			
^ Details 			
Id	4302361199	Status	Open >
Employee	Jeremy Berry (4295098151)	Customer	Old Ed's Soda Shop - Primary
Alternate Assignment	--	Replaces Assignment	--
Customer DNA	No	Employee DNA	No
Job Order	Customer Service Rep.		

Active assignment records are those records that persist each week that the employee works. After the employee has finished an assignment, that assignment should be ended.

Ended assignments are no longer considered active and will have an end date and status update to show they are completed. Check out [Beyond - Mass Update Assignments](#) for more information.

Active assignments are important records for your front office team as they provide job details specific to that employee. They also are important for your back office team as each week a time card will be populated in the system for every active assignment.

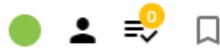
This article covers the following assignment information:

- [Charms](#)
- [Details](#)
- [Job Information](#)
- [Employee Contact Methods](#)
- [Other Contact Methods](#)

- [Financials](#)
 - [Other Information](#)
 - [Commission](#)
-

Assignment Charms

Charms are located underneath the assignment header or to the right of the assignment header information. They can indicate quick information or give you more options.



- The status charm displays the current status of the assignment record. Green is active and grey is inactive.
 - The onboarding charm allows you to quickly assign an HRCenter workflow or page to the employee assigned. Check out [Beyond - Onboarding](#) for more information.
 - The task charm allows you to see and add any tasks linked to this particular assignment record. Check out [Beyond - Tasks](#) for more information.
 - The bookmark charm allows you to save this record underneath the bookmarks section of the activity panel on the left or under the Beyond menu.
-

Assignment Details Card

Under the details tab on the assignment record, there is a details card which will display basic information including the current status of this assignment.

^ Details	
Id	4301403926
Status	Complete >
Employee	James West (4295080490)
Customer	Buy N Large - Primary
Alternate Assignment	--
Replaces Assignment	--
Customer DNA	Yes
Employee DNA	Yes
Job Order	Distribution Specialist

The **blue links** will bring you to the related employee, customer, or job order record.

The **assignment status** (along with the end date) helps dictate whether the assignment is active or not. Any status other than "Open" typically means the assignment is done. Click on the status to change it. Keep in mind that in order to change the status, you may be required to complete other sets of information. Check out [Beyond - Status Change Workflows](#) for more information.

DNA stands for "Do Not Assign." Use the pencil icon in the upper right to change this option. If set to "Yes" the employee record will have an assignment restriction added to it. Check out [Beyond - Assignment Restrictions](#) for more information.

Job Information

The Job Information card located under the details tab on an assignment record, shows the basic job information including shift, job title, and start/end dates.

James Jordan West (4301403926)

Buy N Large · Distribution Specialist

VISIFILE
DETAILS
MESSAGES
CUSTOM DATA

^ Job Information ✎

SUN
MON
TUE
WED
THU
FRI
SAT

Job Title	Distribution Specialist
Business Code	Production
Original Start Date	11/8/2018
Expected End Date	11/28/2018
Start Date	11/8/2018
End Date	5/14/2019
Shift	AM shift
Start Time	8:00 AM
End Time	4:00 PM
Worksite Address	EAGAN, MN 55121-2273
Shift Notes	--







If you fill this information out on the order record, when the assignment is created, this information will automatically be populated with the same information. Use the pencil icon in the upper right to edit any of the information.

The **days of the week** that are highlighted in blue show the days that the employee is expected to report for this assignment.

Shifts and **worksite addresses** come from the Customer record. Check out [Beyond - Customer Defaults](#) and [Beyond - Departments vs Worksites](#) for more information.

Employee Contact Methods

Employee contact methods card located on the assignment details displays any contact information that is saved on the employee's record.


Employee Contact Methods		
	jameswest@xip.xom Email	
	(201) 510-5010 Phone	
	(674) 333-2222 Emergency	

The golden star indicates that contact method is the primary way to contact this employee

Update employee contact information from the visifile of the employee's record.

Other Contact Methods

The other contact methods card on the assignment will show any additional primary contact information related to this assignment such as the supervisor's contact information.

Other Contact Methods	
Amy Andrew	
	(456) 891-5362

Only primary contact information will display here. You can set a contact method as "primary" by navigating to the contact record and selecting edit on the contact information that should be used first:

CONTACT Amy Andrew, 100 Acre Woods, Inc.


Andrew, Amy (13858)
AM Manager · Eagan, MN 55121


VISIFILE DETAILS DOCUMENTS MESSAGES CUSTOM DATA




Primary


Branch: High Tech NE Company

Status: Active >


^ Note  No note available



^ Contact Information 

 (456) 891-5362
Office Phone  

 amy@100AW.xom
Email


^ Messages

 Pin

 Edit 

High Tech NE Company

Edit Contact Method

 **Method Type**
Office Phone

Phone Format Phone Number
U.S. +1 (456) 891-5362

Pin

Set as primary phone

SAVE AS DRAFT CANCEL SUBMIT

Primary contact methods will have a golden star next to them.

When Amy is added to the contact roles section on the order record, it will automatically push Amy's primary contact information to the related assignments:



JOB ORDER 100 Acre Woods, Inc., Accounts Payable (4295035767) / Details

100 Acre Woods, Inc. - Primary (4295035767)
Accounts Payable: 1 of 2 positions filled

VISIFILE DETAILS CANDIDATES DOCUMENTS MESSAGES CUSTOM DATA

Doubletime Bill Rate	40.00	Doubletime Pay Rate	0.00
GP Percent	37.605%	Desired GM %	--
GP Estimate	1,203.36		Add

Contact Roles +

 **Andrew, Amy (13858)**
Supervisor
(456) 891-5362 amy@100AW.xom 

Financials

The financials card located on the assignment details page will display pay and bill rates for this particular assignment.

Financials ✎

Multiplier Code	1.5	Overtime Factor	1.5000
Bill Rate	22.50	Pay Rate	15.00
Salary Bill Rate	0.00	Salary Pay Rate	0.00
Unit Bill Rate	0.0000	Unit Pay Rate	0.0000
Overtime Bill Rate	33.75	Overtime Pay Rate	22.50
Doubletime Bill Rate	45.00	Doubletime Pay Rate	30.00
Worker Comp Code	Tx8742	W-2	Yes
Employer	HiTech Staffing	Vendor	HiTech Staffing
Burden	--	PO Number	--
Payroll Note	--		

If financial information has been entered on the order record, the information will automatically be pushed to the assignment at the time the assignment is created. However, if this particular employee is being paid a slightly different rate, you can still edit the financial details here by selecting the pencil icon in the upper right.

Multiplier codes and **worker comp codes** available when editing depend on the defaults set up on the customer record. Check out [Beyond - Customer Defaults](#) for more information.

PO Numbers must first be set up on the customer record in order to track expiration dates or max amounts. Check out [Beyond - How to Create & Manage Purchase Orders](#) for more information.

Unit Bill & Unit Pay rates can be entered on the assignment if there are bonuses or additional non-hour related pay. For example, in a warehouse setting, employees might be paid by hour and by pieces assembled.

Payroll Notes will display in time entry for the payroll processor each week.

Other Information

The other information card on the assignments detail page displays additional assignment information including who created the assignment and the date it was created.

^ Other Information 			
Sales Team	None	Taken By	Amelia Stout
Date Assigned	2/19/2020	Entered By	Amelia Stout
Branch	High Tech NE	Prevent from Auto Closing	No
Account Manager Rep	--	Performance Note	--

Commission

If you are utilizing the [Commission module](#), you can edit commission amounts on the assignment record in Beyond.

^ Commission Allocations 	
 paulp - 10% Employee Owner	
 Amelia Stout - 15% Order Owner	

Select the + in the upper right to add a new allocation

Select the ellipses to the right of an allocation to edit it.

Viewing Assignment Information on the Employee Record

You can see a list of assignments an employee has worked on their [visifile](#). You can click on any assignment to be brought to the assignment record.



Angelina Bentley (4295054549)

SSN: 111-22-3333 · City, MN 55125

VISIFILE DETAILS DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAY SETUP ONBOARDING PAY HISTORY CUSTOM DATA

^ Assignments



Account Analyst at Keiser - Claims

● Complete Start Date: 11/10/2019 End Date: 8/6/2021
20.00 pay rate / 30.00 bill rate



Support Coordinator I at Integ Supplies - Primary

● Customer Cancelled Start Date: 1/6/2015 End Date: 2/6/2015
14.00 pay rate / 24.00 bill rate



Unknown at 50k Assigned Employees - Primary

● Customer Cancelled Start Date: 10/10/2017 End Date: 10/11/2017
15.00 pay rate / 25.00 bill rate



Accountant at 3M - Primary

● Open Start Date: 8/12/2021 End Date: --
20.00 pay rate / 30.00 bill rate

- Green circle will indicate this is an active assignment
- Grey circle will indicate the assignment is inactive (canceled, ended, etc.)

Related Articles