

# Beyond - Assignment Details Overview

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## 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.

The screenshot shows the 'ASSIGNMENT' page for 'Assignment (4302427921)'. The header includes the employee name 'Jeremy Jack Berry (4302427921)' and the job title 'Old Ed's Soda Shop - Customer Service Rep.'. A navigation bar contains tabs for 'VISIFILE', 'DETAILS', 'MESSAGES', and 'CUSTOM DATA'. A top utility bar includes icons for 'ACTIVE', 'REPORTS', 'ONBOARDING', 'TASKS', 'SEND EMAIL', 'BOOKMARK', and 'MORE'. The main content area is divided into two sections: 'Snapshot' and 'Messages'. The 'Snapshot' section contains a table with the following data:

Assignment Id 4302427921	Status Open >
Employee Id 4295098151	Job Order Id 4295035815
Branch High Tech NE	Temp Phone --
Pay Rate 17.00	Bill Rate 25.50
Employer High Tech & Staffing Services, Inc	

The 'Messages' section is currently empty, displaying 'No messages' and a red plus icon in the bottom right corner.

**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.

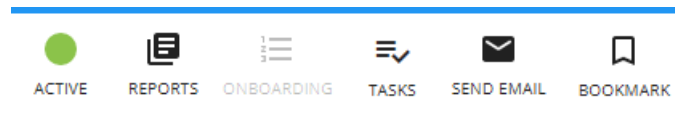
**Active** assignments are important records for your front office team as they provide job details specific to that employee. They also are important for your back office team as each week a time card will be populated in the system for every active assignment.

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 "Reports" charm allows you to view reports that directly correlate to the assignment record. Check out [Beyond - Profile Reports](#) for more information.
- 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 "Tasks" charm allows you to see and add any tasks linked to this particular assignment record. Check out [Beyond - Tasks](#) for more information.
- The "Send Email" charm opens the ability to send an email directly to the employee that is on the assignment record. Check out [Beyond - How to Email in Beyond](#) 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	
<b>Id</b> 4302427921	<b>Status</b> Open >
<b>Employee</b> 4295098151	<b>Customer</b> <a href="#">Old Ed's Soda Shop - Primary</a>
<b>Alternate Assignment</b> --	<b>Replaces Assignment</b> --
<b>Customer DNA</b> No	<b>Employee DNA</b> No
<b>Job Order</b> <a href="#">Customer Service Rep.</a>	

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.

Job Information						
SUN	MON	TUE	WED	THU	FRI	SAT
Job Title Customer Service Rep.			Business Code Industrial NotHighTech			
Original Start Date 2/12/2020			Estimated End Date --			
Start Date 8/4/2020			End Date 12/12/2022			
Shift Morning			Start Time 8:00 AM			
End Time 4:30 PM			Worksite Address Minneapolis, MN 55121			
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	
 Jeremy@xip.xom Email	
 (235) 262-4829 Phone	

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

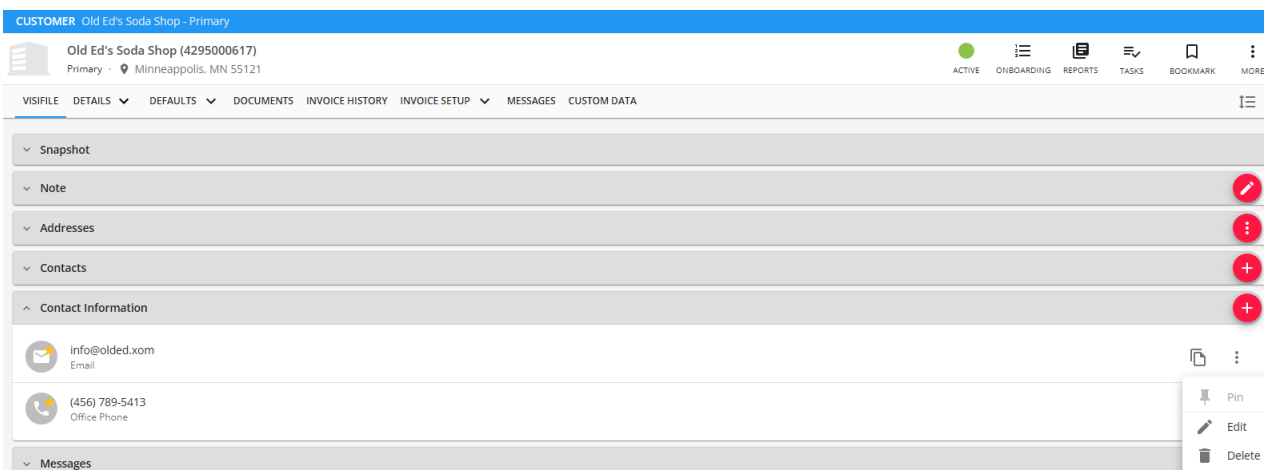
Update employee contact information from the visifile of the employee's record.

## 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.



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



### Edit Contact Method

 \* Method Type  
Office Phone

\* Phone Format      \* Phone Number  
U.S. +1      (456) 789-5413

Pin

Set as primary phone

Notes

SAVE AS DRAFT      CANCEL      SUBMIT

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

## 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 37.50	Pay Rate 25.00
Salary Bill Rate 0.00	Salary Pay Rate 0.00
Unit Bill Rate 0.0000	Unit Pay Rate 0.0000
Overtime Bill Rate 56.25	Overtime Pay Rate 37.50
Doubletime Bill Rate 75.00	Doubletime Pay Rate 50.00
Worker Comp Code Tx8742	W-2 Yes
Employer High Tech & Staffing Services, Inc	Vendor High Tech & Staffing Services, Inc
Burden --	PO Number 12983
Payroll Note --	Other Agency Pay 0.00
<a href="#">Select Rate Sheet &gt;</a>	

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	--

**Prevent From Auto Closing:** This field currently has no function as the system will not auto close assignments regardless if this box is or is not checked.

## Commission

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



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.

<input type="checkbox"/>	Assignment Id	Customer	Department	Status	Job Order Id	Job Title	Bill Rate	Pay Rate	Start Date ↓	End Date
<input type="checkbox"/>	4302428573	3M	Primary	Open	4295033328	Accountant	30.00	20.00	8/12/2021	
<input type="checkbox"/>	4302359703	Keiser	Claims	Complete	4295036117	Account Analyst	30.00	20.00	11/10/2019	8/6/2021
<input type="checkbox"/>	4301502089	50k Assigned Employ...	Primary	Customer Cancelled	4295034818	Unknown	25.00	15.00	10/10/2017	10/11/2017
<input type="checkbox"/>	4301380831	Integ Supplies	Primary	Customer Cancelled	4295033232	Support Coordinator I	24.00	14.00	1/6/2015	2/6/2015

- You can filter the assignment(s) within the list by Status.
- You can log a message by selecting one or more assignments within the list:
  - When only one assignment is selected, the message is logged on the assignment record and all other linked records.
  - When multiple assignments are selected, the message is logged only on the assignment record.
- You can send an email by selecting one assignment from the list.
- You can create a new assignment for the employee by selecting the "NewAssignment" button to the right:
  - This is enabled if you have previewed a Job Order record before visiting the employee record.
  - This is disabled if you have not previewed any Job Order record before visiting the employee record.

**\*Note\*** The "Job Order ID" column within the list is hidden by default. To show this column, right-click on the column header and select the checkbox for "Job Order ID":

The screenshot displays the 'Assignments' page for Angelina Bentley. A dropdown menu is open, showing various columns that can be toggled on or off. The 'Job Order Id' option is highlighted with a red box. The background table shows the following data:

Assignment Id	Customer	Job Order Id	Job Title	Bill Rate	Pay Rate	Start Date	End Date		
<input type="checkbox"/>	4302428573	3M	4295033328	Accountant	30.00	20.00	8/12/2021		
<input type="checkbox"/>	4302359703	Keiser	4295036117	Account Analyst	30.00	20.00	11/10/2019	8/6/2021	
<input type="checkbox"/>	4301502089	50k Assigned Employ...	er Cancelled	4295034818	Unknown	25.00	15.00	10/10/2017	10/11/2017
<input type="checkbox"/>	4301380831	Integ Supplies	er Cancelled	4295032322	Support Coordinator 1	24.00	14.00	1/6/2015	2/6/2015

## Related Articles