

Beyond - Managing Order Interest Codes

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Interest Codes on the Order Record

You can set up interest codes on order records to track important order related information including required skills or documents.

Note The list of interest codes available can be updated by your admin in Enterprise. For more information see [Enterprise - Creating Interest Codes](#).

This article includes:

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3. [Order Interest Codes & Candidates](#)
4. [Searching Orders based on Interest Codes](#)

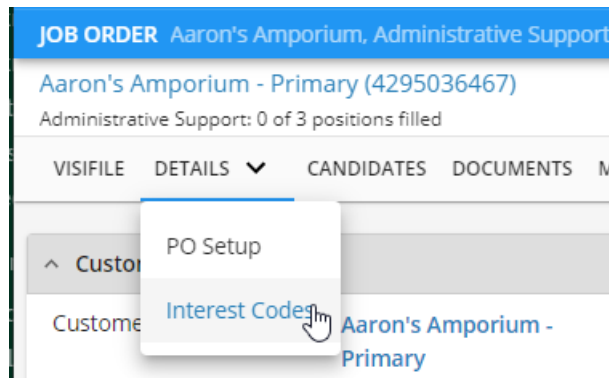
Managing Interest Codes on the Order

Interest codes on an order can be found by navigating to the Details tab > Interest Code Card:

The screenshot shows the 'Details' tab selected in a navigation bar with options: VISIFILE, DETAILS (selected), CANDIDATES, DOCUMENTS, MESSAGES, and CUSTOM DATA. Below the navigation bar, there are two main sections:

- Contact Roles:** A header with an expand/collapse arrow and a red '+' icon. Below it is a card for 'J, Tiffany (13983)', Supervisor, with phone number (235) 111-0002 and email Tiffany@amporium.xom. A red trash icon is visible to the right.
- Interest Codes:** A header with an expand/collapse arrow and a red pencil icon. Below it are two entries:
 - '1st Shift' with a red vertical ellipsis menu icon to its right.
 - 'Background Check' with the subtext 'Required for Assignment' and a red vertical ellipsis menu icon to its right.

Or by selecting the arrow next to Details and choosing Interest Codes:

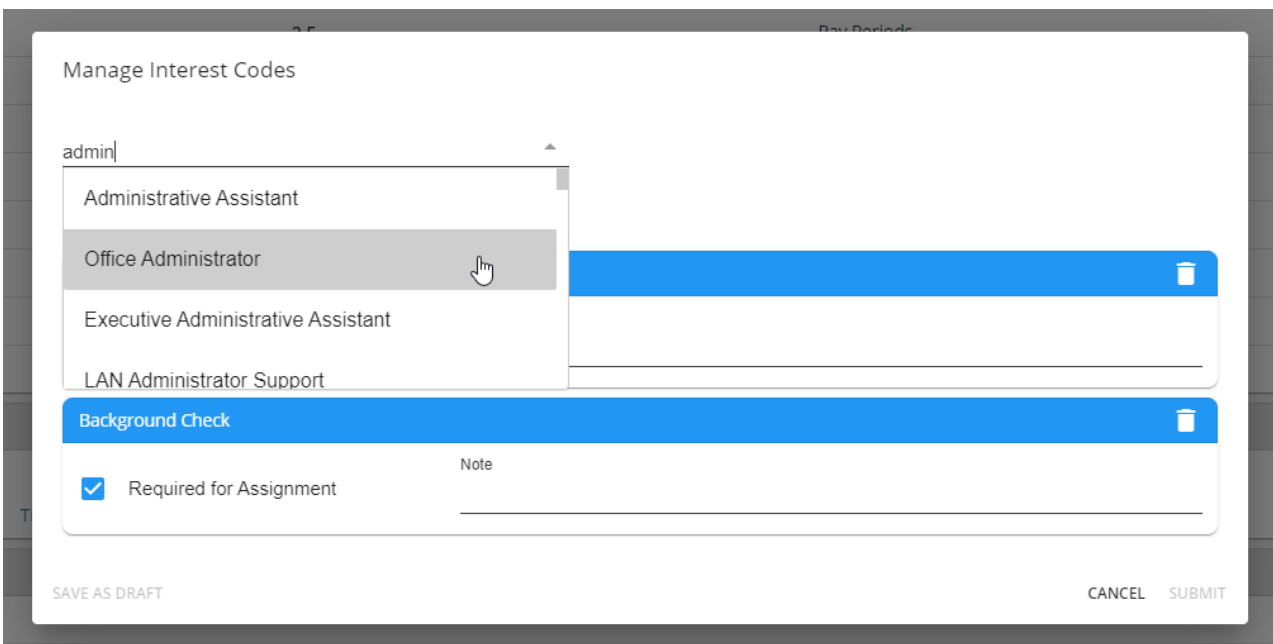


In either location, select the  to add or edit interest codes en mass.

This will open the 'Manage Interest Code' window.

To Add Interest Codes:

Use the drop down to scroll through the list or begin typing the skill you wish to tag your order with:



Note If you are using interest codes on the customer record, they will automatically populate on each new order created. Check out [Beyond - Managing Customer Interest Codes](#) for more information.

To Remove Interest Codes:

Select  next to the interest code you want to remove

Additional Information:

When editing or adding an interest code you can denote the following:

Selected Interest Codes (2)

| 1st Shift | |
|--|--------------------------------------|
| <input type="checkbox"/> Required for Assignment | Note 8 - 5 but flexible if needed |

| Background Check | |
|---|--|
| <input checked="" type="checkbox"/> Required for Assignment | Note Standard package is all that is needed |

- **Required for Assignment:** This checkbox when checked will require that the employee has the same interest code when being assigned to this order
- **Note:** This section allows you to add any additional details you want to include here

Order Interest Codes & Assignment Restrictions

If you have set any of the interest codes on the order as "Required for Assignment", the employees you assign will be required to have the same interest code on their record in order to be assigned.

If the employee you are trying to assign is missing a required interest code, you will receive an assignment restriction message:

Add New Assignment - Assignment Restrictions

Enter Assignment Information 2 Assignment Restrictions

Approve All Assignment Restrictions
All restrictions must be approved in order to create the assignment

Assignment Restrictions

- The employee is missing the following interest code: Background Check
Berry, Jeremy
- Employee is missing ACA Hire Date
Berry, Jeremy

SAVE AS DRAFT CANCEL < PREVIOUS SUBMIT

To resolve this, you have two options:

Option 1: Fix the issue

1. Select Cancel
2. Navigate to the employee's record
3. Add the new interest code needed

| Interest Codes | |
|--|---|
| 1st Shift 0 years of experience · Not Validated | ⋮ |
| Computer Operator 0 years of experience · Not Validated | ⋮ |
| Customer Service 0 years of experience · Not Validated | ⋮ |

4. Try to assign again

Keep in mind there may be additional tasks to complete. In this case, the interest code was related to completing a background check so I may want to submit a [background check request](#) before I add the interest code to the employee's record. Always work with your management team to ensure you are following company policies.

Option 2: Approve the Restriction



Technically this assignment restriction is a soft stop. So if you are in a tight spot or the interest code should not have been required on this order, then you could select the checkbox at the top of the assignment restriction widow to "Approve All Assignment Restrictions." You'll be able to select submit after that and it will create the assignment record.

Add New Assignment - Assignment Restrictions

Enter Assignment Information
 2 Assignment Restrictions

Approve All Assignment Restrictions

Assignment Restrictions

-  The employee is missing the following interest code: Background Check
Berry, Jeremy
-  Employee is missing ACA Hire Date
Berry, Jeremy




SAVE AS DRAFT CANCEL < PREVIOUS SUBMIT

Usually a required interest code was put there for a reason, so always check with your management team to ensure you are not approving assignment restrictions that you should not.

Order Interest Codes & Candidates

If you are utilizing the [candidates tab](#) to track potential employees for an order, order interest codes might help you rank candidates.

Once you have added a candidate to the candidates tab, you will see a column labeled "Interest Code Match %":

| VISIFILE DETAILS CANDIDATES DOCUMENTS MESSAGES CUSTOM DATA | | | | | |
|--|--|-----------|-------------------------|------------------------------------|---|
| Filter by status... | | | | | |
| Search returned 8 results | | | | ↓ | + |
| | Employee | Status | Interest Code Match % ↓ | Comment | |
| ▼ |  Ralf Vandy Interview on Aug 7, 2020 | Interview | 67% | Interview on Thursday | |
| ▼ |  Deitrich Devon PendingBC on Aug 7, 2020 | PendingBC | 50% | Background check request submitted | |
| ▼ |  Jaspar Ferguson Candidate on Aug 7, 2020 | Candidate | 33% | | |

The system will review the interest codes on the employee's record and on the order record to determine what % of interest codes match what the order wants.

This can make it easier to see who is the most qualified or who is the most ready to send off to work.

Check out [Beyond - The Candidates Tab](#) for more information on candidate options.

Searching for Orders Based on Interest Codes

Sometimes, you may want to see all orders that have specific interest codes on them so you can match a great potential candidate to your open jobs.

Navigate to Order Search and select Advanced. Add a new rule and type interest code to search by interest code.

Search / Job Orders / Advanced

BASIC
ADVANCED

☰ Click to select a saved search...
^

NOT

AND
 OR

☰
>

Filled

✕
▼

IS FALSE

Show in results

✕

☰
>

Active

✕
▼

IS TRUE

Show in results

✕

☰
>

Interest Code

✕
▼

EQUALS

Office Administrator

✕
▼

✕

+
RULE / GROUP

SAVE...
=
RESET
SEARCH

For more information on searching in Beyond, see [Beyond - Advanced Searching](#).

Related Articles