

# Beyond - Assignment Frequently Asked Questions

Last Modified on 08/10/2020 2:21 pm CDT

This article will review some of the most common questions about assignment records in Beyond.

## What is Beyond?

TempWorks Beyond™ is a comprehensive mobile applicant tracking system (ATS) and customer relationship management (CRM) browser-based solution offered for the staffing industry. It allows you to access your applicant & customer records from any device connected to the internet and utilizing a web browser (for more information on logging in see [Beyond: How to Log In](#)).

The screenshot displays the Beyond dashboard interface. At the top, it shows the 'Dashboard' title, the user's team ('Recruiting Team'), and an 'EDIT' button with a '+ DASHBOARD' link. Below this, there's a 'NUMBER OF DAYS' filter set to 'TODAY'. The main content area is divided into several sections:

- Tasks:** A list of tasks with a 'Due Date' dropdown. One task is visible: 'call billy' with a checkmark and a menu icon. A 'GO TO TASKS PAGE' button is below.
- Available Employees:** A summary showing 'Eligible and Active Unassigned Employees' (134) and 'Employees with an Assignment ending in the next 7 days' (0).
- Upcoming Employee Birthdays:** A table listing employees with their birthdays.
- New Applicants by Branch:** A stacked bar chart showing the number of new applicants in the past 30 days for five branches: Branch ID, High Reach NE, High Reach NW, High Reach SE, and High Reach SW. The chart includes a legend for various referral sources.
- Assignments Summary:** A section header for assignment data.

Name	Birthday	Address	City	State	Zip
API Test EE, Jonathan	1/23	API Test EE Street	St Paul	MN	55
API Test EE, Eric	1/23	API Test EE Street	St Paul	MN	55

Branch	Unknown	Job Track	Job Fair	Internet Post Response	General Internet Resp	Friend/Relative Referral	Daily Bulletin	College Referral	Classified Ad	Candidate Referral	Broadbean	Bill Board	API Web Page
Branch ID	3	2	1	1	1	1	1	1	1	1	1	1	1
High Reach NE	30	1	1	1	1	1	1	1	1	1	1	1	1
High Reach NW	1	1	1	1	1	1	1	1	1	1	1	1	1
High Reach SE	34	1	1	1	1	1	1	1	1	1	1	1	1
High Reach SW	2	1	1	1	1	1	1	1	1	1	1	1	1

### FAQ List:

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## Q: What is an Assignment Record?

**Answer:** The assignment record shows where an employee has worked in the past or is currently working. Assignment records tie together employee, customer, and order information. Assignment records are for individual employees allowing you to further customize information including pay and bill rates.

The screenshot displays the 'ASSIGNMENT' page for 'Assignment (4302377233)'. The header includes navigation icons and 'TASKS', 'QUICK', and 'LIVE CHAT' buttons. Below the header, the employee name 'Marlin Acosta (4302377233)' and role 'Old Ed's Soda Shop · Customer Service Rep.' are shown. A menu bar contains 'VISIFILE', 'DETAILS', 'MESSAGES', and 'CUSTOM DATA'. The 'DETAILS' section is expanded, showing a table with the following data:

Id	4302377233	Status	Open >
Employee	17407	Customer	Old Ed's Soda Shop - Primary
Alternate Assignment	--	Replaces Assignment	--
Customer DNA	No	Employee DNA	No
Job Order	Customer Service Rep.		


The 'Job Information' section is also expanded, showing a weekly calendar view with days from SUN to SAT. Below the calendar, the following information is displayed:

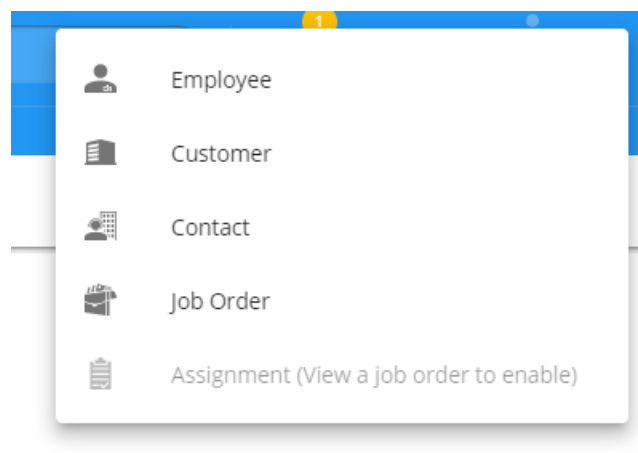
Job Title	Customer Service Rep.	Business Code	--
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Check out [Beyond - Record Types](#) for more information on what records are available in Beyond.

## Q: How Do I Create an Assignment?

**Answer:** There are many different ways to create an assignment record in Beyond. One of the easiest ways is to view an order that you need to fill and then find the employee you want to assign.

Select the  icon in the upper right, then select 'Assignment':



This will try to assign the last order you looked at with the current employee you are viewing. Keep in mind the assignment option will be grayed out when no orders have been viewed recently.

Check out [Beyond - How to Create an Assignment](#) for more detailed instructions on all the options you have to create assignment records.

**\*Note\*** Any record added into Enterprise will be automatically added into Beyond and visa versa.

## Q: How Can I Keep Track of Candidates?

**Answer:** Trying to put together a list of your potential candidates? Need employees to go through an interview process with the customer? You can keep track of candidates on the candidates tab of an order:

Employee ↑	Status	Primary Phone	Interest Code Match %	Resume
Christopher Robin BuzzOffer on May 22, 2020	BuzzOffer	(456) 789-1250	33%	
Dantalion Haagenti Candidate on Dec 13, 2019	Candidate	(984) 561-2022	0%	
Amy Adams Interview1 on Jun 11, 2020	Interview1	(234) 432-3456	67%	

Want to learn more? Check out [Beyond - The Candidates Tab](#).

## Q: What are Assignment Restrictions?

**Answer:** Assignment restrictions are a way to alert your recruiters to potential problems when assigning an employee. This can include hard stops, like when an employee record is missing a SSN, or a soft stop, when an employee is missing a required interest code.

Soft stop assignment restrictions can be seen as warning that can be approved while hard stops need to be fixed before an assignment record can be made.

## Add New Assignment - Assignment Restrictions

- Enter Assignment Information   Assignment Restrictions

One or more restrictions cannot be approved. Please correct the records as indicated below or select a different combination of employee and job order.

### Assignment Restrictions



**Cannot approve:** Employee status is unwashed, Please verify employee details and update washed status.

[Adams, Tracy](#)



The employee is missing the following interest code: 7 Panel Drug Tested

[Adams, Tracy](#)



Employee I9 has not been received.

[Adams, Tracy](#)



Employee is missing ACA Hire Date

[Adams, Tracy](#)

To learn more, check out [Beyond - Assignment Restrictions](#).

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## Q: How Can I Update Rates on Assignments?

**Answer:** You can update any pay or bill rate directly on the assignment under the details tab. However, if you have an order with multiple assignments that now have wrong pay rates, you may want to update rates for multiple assignments at once.

Search for the orders or assignments you want to update rates for and use the check boxes to select the orders or assignments you want to update.

Search / Assignments / Advanced

NOT  AND  OR

> Active  IS TRUE  Show in results  X

> Customer  CONTAINS  Old Ed  Show in results  X

+ RULE / GROUP

SAVE... = RESET **SEARCH**

Search returned 78 results  
Active, Customer

3 selected assignments  Clear Selection

<input type="checkbox"/>	Assignment Id ↑	Employee Name ↑	Customer	Department	Job Title	Bill Rate
<input checked="" type="checkbox"/>	4302412576	Abootorabi, Deborah	Old Ed's Soda Shop	Primary	Customer Service Rep.	24
<input type="checkbox"/>	4302377233	Acosta, Marlin	Old Ed's Soda Shop	Primary	Customer Service Rep.	24
<input checked="" type="checkbox"/>	4302377287	Adams, Amy	Old Ed's Soda Shop	Primary	Customer Service Rep.	24

Use the action menu to choose Mass Update Rates and follow the prompts to update rates.

Mass Update Rates - Select Rates

1 Select Rates ————— 2 Preview Changes

Choose an update method and rate changes to apply to the selected records. If you just want to change the multiplier code and update rates accordingly, select a new multiplier code and leave the other fields blank. You will be able to review the updates on the next page before committing them.

**Update Method**

Increase Rates By Value

- Increase Rates By Value
- Increase Rates By Percentage
- Change Rates To Value

Change Multiplier Code To

Do not change Multiplier Code

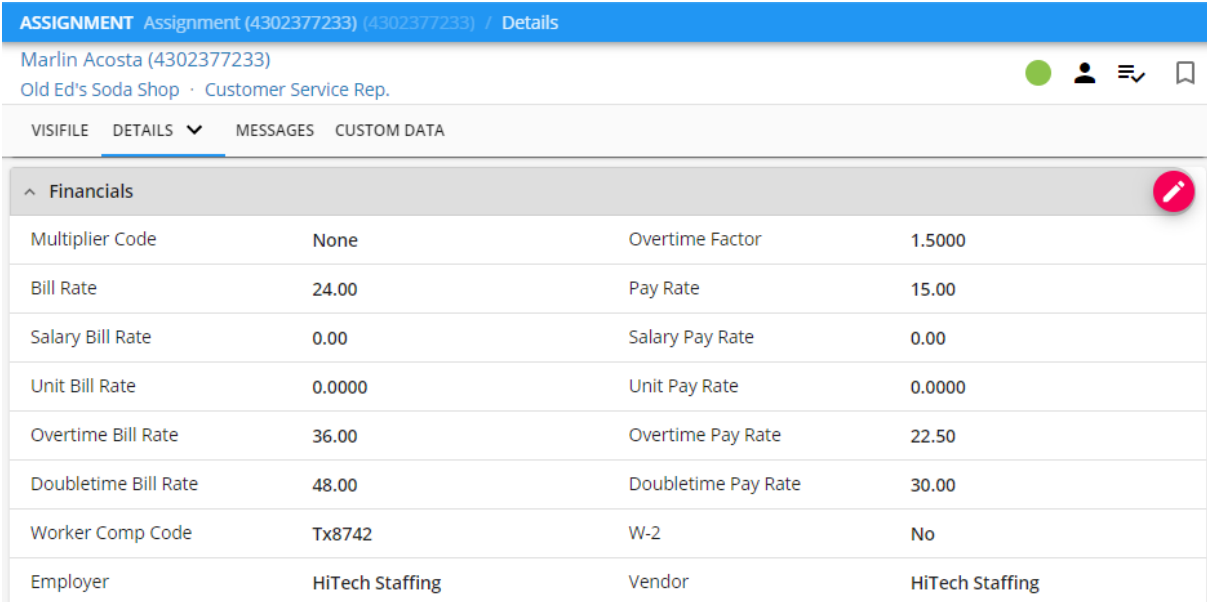
CANCEL **NEXT >**

Check out [Beyond - How to Mass Update Rates](#) for more information.

## Q: How Do Assignment Records Impact Payroll?

**Answer:** Assignment Records have a direct impact on both payroll and invoicing. Each assignment record holds important back office information including pay and bill rates, work sites, worker comp codes etc. that will all flow onto the timecard each week the employee is paid.

You can think of the assignment record as a source of truth for payroll and invoicing processes so it's extremely important that this information is accurate.



Financials			
Multiplier Code	None	Overtime Factor	1.5000
Bill Rate	24.00	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	36.00	Overtime Pay Rate	22.50
Doubletime Bill Rate	48.00	Doubletime Pay Rate	30.00
Worker Comp Code	Tx8742	W-2	No
Employer	HiTech Staffing	Vendor	HiTech Staffing

To make things easier on you and your team, we recommend considering the following:

- Utilize [Customer Defaults](#) to limit and automatically populate options like worker comp codes, multiplier codes, etc.
- Focus on populating the [order](#) with as much information as you can because the pay/bill rates, worker comp codes, worksite, etc. set here will populate on to each assignment record
- Consider making a checklist for those on your sales or recruiting staff that take order requests to make sure they fill out all the necessary information every time. You could also look at having a default form customers use to make the order requests to make sure they are providing all the information.

## Q: Can I Track Additional Information on Assignment Records?

**Answer:** Yes. Whether you are looking to track uniform size, badge Id, or an additional date, you can utilize the custom data tab to keep track of all your miscellaneous items.

**ASSIGNMENT** Assignment (4301403926) (4301403926) / Custom Data

James Jordan West (4301403926)  
Buy N Large · Distribution Specialist

VISIFILE DETAILS MESSAGES CUSTOM DATA

Custom Data

1st	False	
2nd	False	
3rd	False	
acct code	--	

Custom data needs to first be set up by your admin in Enterprise. Check out [Enterprise - How to Setup and Manage Custom Data](#) for more information.

Check out [Beyond - Custom Data](#) for more information on where you can find custom data options in Beyond.

## Q: How Do I End an Assignment?

**Answer:** When an employee has finished an assignment, it's important to end the assignment to keep your records up to date and ensure your employee is showing up as unassigned in employee searches.

To end an assignment, you need to enter the End Date and set the Status to anything other than open:

**B** Search Anything...

**ACTIVITY PANEL** **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	4295098151	Customer	Old Ed's Soda Shop - Primary
Alternate Assignment	--	Replaces Assignment	--
Customer DNA	No	Employee DNA	No
Job Order	Customer Service Rep.		

Job Information

	SUN	MON	TUE	WED	THU	FRI	SAT
Job Title		Customer Service Rep.					
Original Start Date		2/12/2020					
Start Date		2/12/2020					
Shift		Morning					
End Time		4:30 PM					
Business Code						Industrial NotHighTech	
Expected End Date						--	
End Date						--	
Start Time						8:00 AM	
Worksite Address						Minneapolis, MN 55121	

Check out [Beyond - How to End an Assignment](#) for more information.

## Q: Can I End Multiple Assignments at Once?

**Answer:** Yes! If you have lots of assignments ending at the same time, you can update them all at the same time using an order or assignment search to gather them and choosing the option to Mass Update Assignments:

The screenshot shows a search results page with a table of assignments. The table has columns for Last Name, First Name, Customer Name, Assignment Id, Employee Id, and Status. A search filter is applied to Customer Name with the value '100'. The status is set to 'Active'. There are 'RESET' and 'SEARCH' buttons. Below the table, it says 'Search returned 149 results'. A red pill indicates '20 selected items' and a link to 'Select all 149 results?'. A dropdown menu is open over the table, showing options: 'Mass Update Rates', 'Mass Update Assignments' (highlighted with a mouse cursor), and 'Assign a New Workflow...'. The table data includes:

	Last Name	First Name	Customer Name	Assignment Id	Employee Id	Status
<input checked="" type="checkbox"/>		Stout	Jerry	100 Acre Woods, Inc.	Primary	Laborer
<input checked="" type="checkbox"/>		Peterson	Fran	100 Acre Woods, Inc.	Primary	Laborer

Check out [Beyond - Mass Update Assignments](#) for more information.

## Q: What is the Other Contact Methods Card and How Does it Work?

**Answer:** The "Other Contact Methods" card is located on the details tab of the assignment record and will display relevant phone numbers and email addresses based on the order.

The screenshot shows a card titled 'Other Contact Methods' with a dropdown arrow. It contains the following information:

- Employee Contact Methods:** A card showing an email address 'ta@somedomain.com' with an email icon and a copy icon.
- Other Contact Methods:** A card showing the name 'Amy Andrew' and a phone number '(456) 891-5362' with a phone icon and a copy icon.
- Financials:** A card with a dropdown arrow and a red edit icon. Below it, the text 'Multiplier Code' and 'None' is visible.

This is populated based on the contact information on the customer record and the contact roles selected on the order. To learn more, check out [Beyond - Assignment Details](#)

## Related Articles



