Beyond - Sales & Account Management Manual

Last Modified on 04/18/2024 3:39 pm CDT

Welcome to Beyond™ for Sales & Account Managers!

TempWorks® Beyond is our mobile-friendly, browser based customer relationship management system (CRM). This guide is here to provide a road map for front office sales and account managers to help them understand the full functionality of Beyond.

When we talk about Sales and Account Management, we mean anyone who works with customers - prospects or existing. This can include:

- Managing Prospects and Sales Process
- Managing Customer Records
- Creating Customer Requests (Orders)

New to Beyond?

If you are brand new to Beyond, check out our Beyond Starter Pack which is packed with articles for all users. Looking for a place to start? Check out:

- Beyond - How to Log In
- Beyond - Record Types
- Beyond - Dashboard
- Beyond - Hierarchy

> ***Note*** If you are looking for more training, we offer weekly webinars that you (or your admin) can find and sign up for via Bridge.

The following sections of this guide provide links to articles to learn about different functionality. These sections are separated by topic and are organized to help you navigate from basic functionality to some of our more advanced options all with the sales and account management responsibilities in mind.

Managing Prospects & Sales Process

What is a Customer Record?

> Customer records in Beyond can be existing, past, or prospective customers. Most prospects will start with

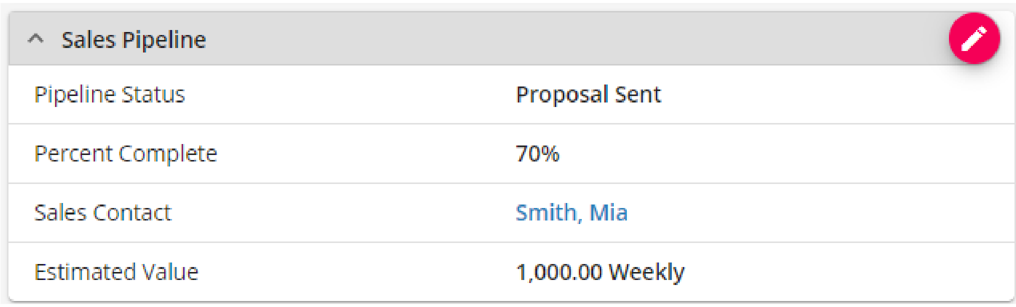
> some sort of contact that you can set up as a prospect records. Then they can easily be converted to a customer record when they reach a certain point in your sales process.

Check out the following links to learn more about tracking your sales process.

Prospect & Sales Basics

Start with the following articles to gather more fundamental knowledge related to customer setup & sales:

- Beyond - How to Create a Prospect Record
- Beyond - Converting a Prospect to a Customer Record
- Beyond - How to Create a Customer Record
- Beyond - Creating a Contact Record
- Beyond - Managing Sales and Service
- Beyond - Message Logging
- Beyond - Filling out Customer Related Forms
- Beyond - Utilizing Search Near Me



Sales Process Questions to Consider

Download this file as a PDF (click the PDF icon at the top) and take notes or discuss these questions with your team:

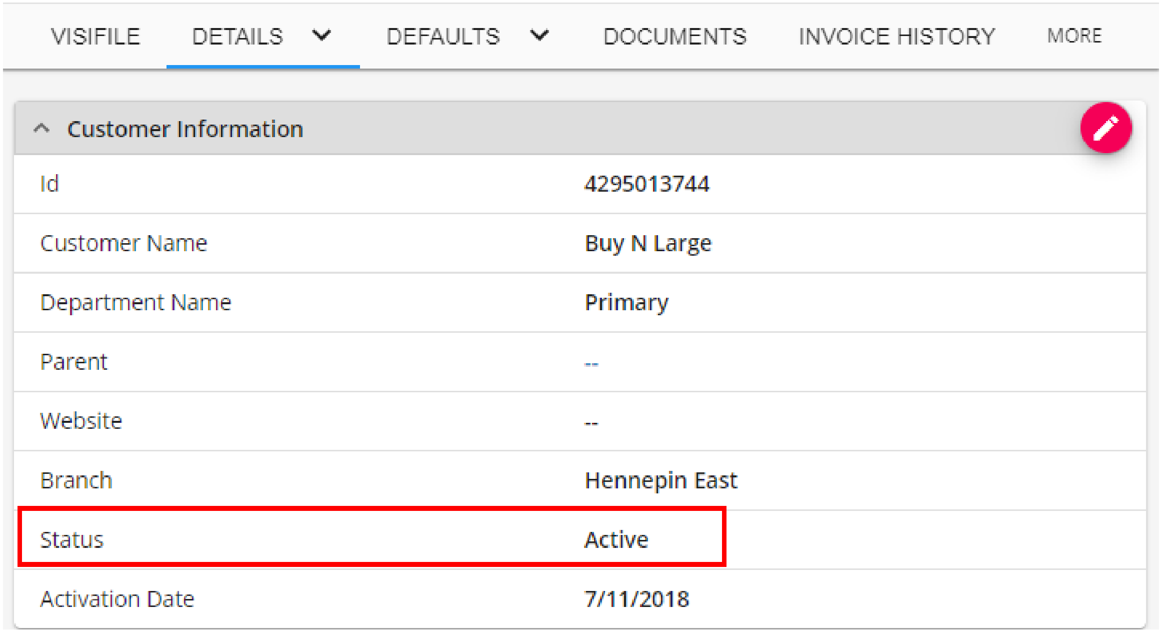
Question	Answer
When will you enter customers into the system? (ex. when prospects? or only after the contract is signed?)	
What types of actions/processes will you be documenting with message action codes? (ex. phone call, email, presentation, lunch meeting, etc.)	

Question	Answer
Will you be filling out "how heard of" information to track marketing campaigns?	
How will you determine sales teams? (groups or individuals?) Who is in charge of managing sales teams in the system?	
What will your sales pipeline look like and what statuses/stages are you tracking with the sales pipeline?	
Will you be utilizing HRCenter to create customer related forms such as quotes, contracts, etc?	

Managing Customer Information

What Do You Do After You Get the Contract?

> Once a customer has signed a contract, you may have additional steps needed to document their contract details and have the customer record ready for orders.

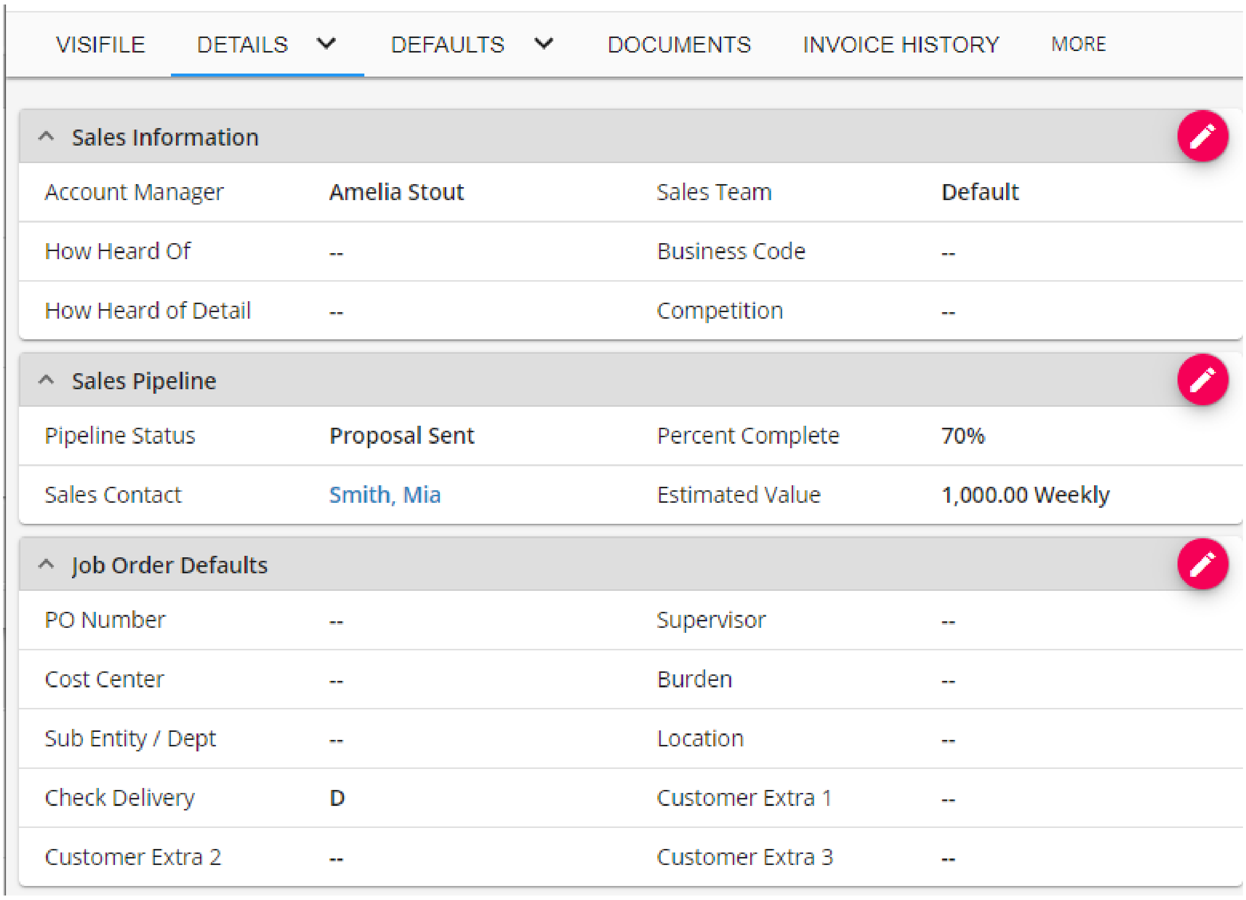


Check out the following links to learn more about customer record keeping options:

Post Contract Info

Consider the following options for tracking information on the customer record:

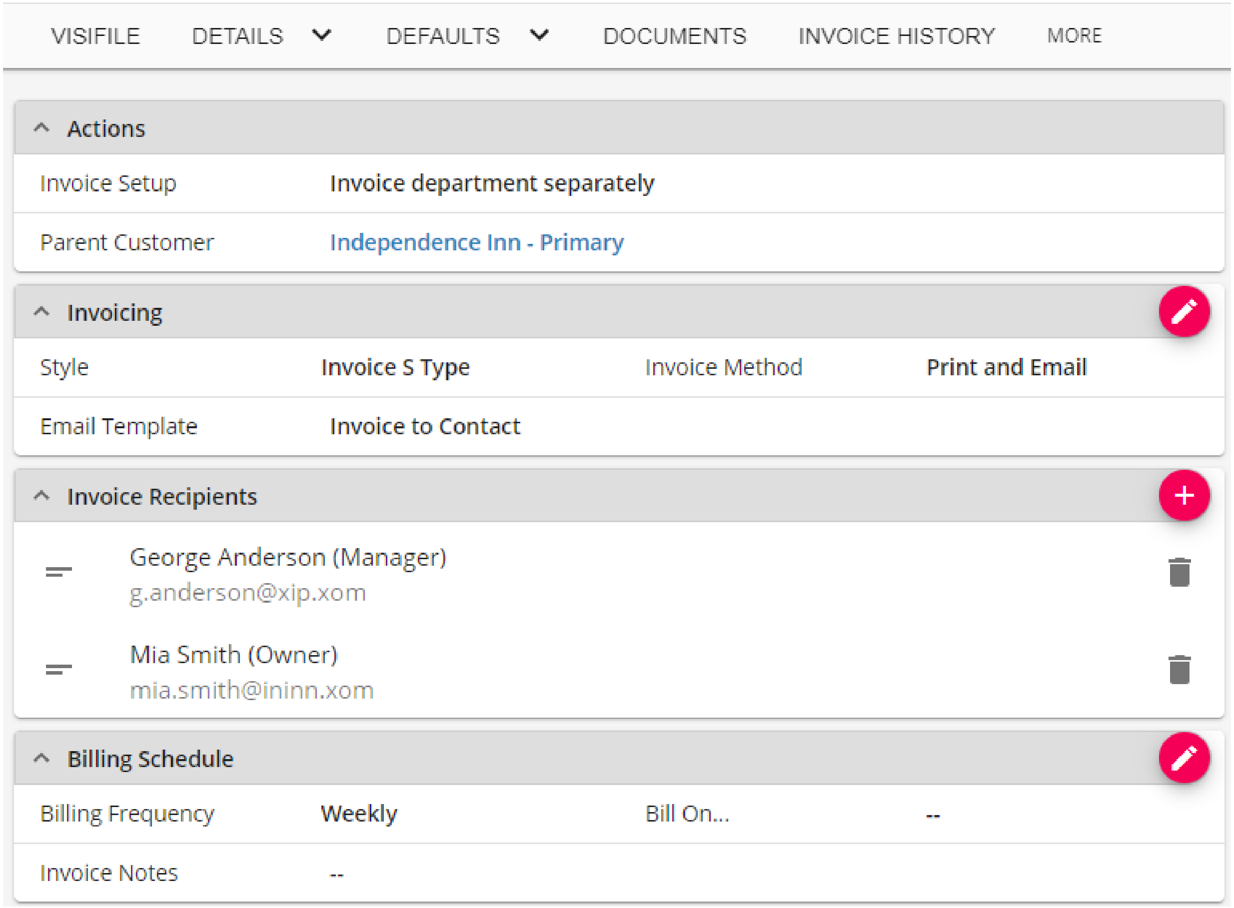
- Beyond - Customer Record Must-Haves
- Beyond - Departments vs Worksites
- Beyond - Managing Customer Defaults
- Beyond - Managing Customer Interest Codes
- Beyond - Creating a Contact Record
- Beyond - Documents
- Beyond - The Visifile



Invoice Related Setup

After a contract is signed, you may need to set up invoice related information. Consider the following options for invoice setup:

- Beyond - How to Manage Billing Setup
- Beyond - How to Create & Manage Purchase Orders



Post-Contract Process Questions to Consider

Download this file as a PDF (click the PDF icon at the top of this article) and take notes or discuss these questions with your team:

Question	Answer
Who will be entering the invoice setup information?	
Will you be utilizing the customer default options? If so, who will enter this information once a customer has signed a contract?	
Does your team need to do a credit check before a customer can be marked as active? What other customer statuses might you use?	

Question	Answer
Do you have larger customers that might need billing or reporting separated by departments? Who will be responsible for creating department records or additional worksites?	
Will you be tracking PO numbers for customers?	
Are you saving important customer documents electronically?	

Creating Customer Requests

What is an Order Record?

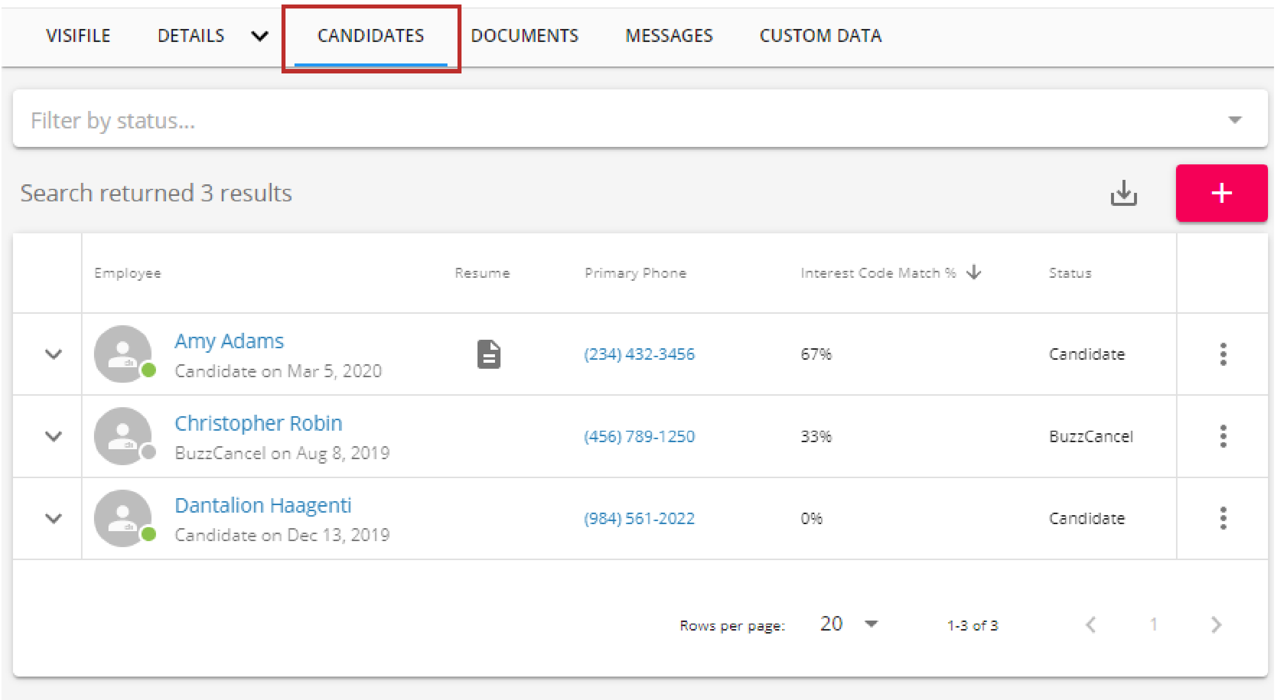
> The Order record contains information regarding all job openings (requisitions, openings, requests) placed by customers. Order records hold valuable information including shift times, start dates, financial details, worksite details etc.

Check out the following links to learn more about order record options:

Order Basics

Start with the following basic order options for making your order creation and management easy:

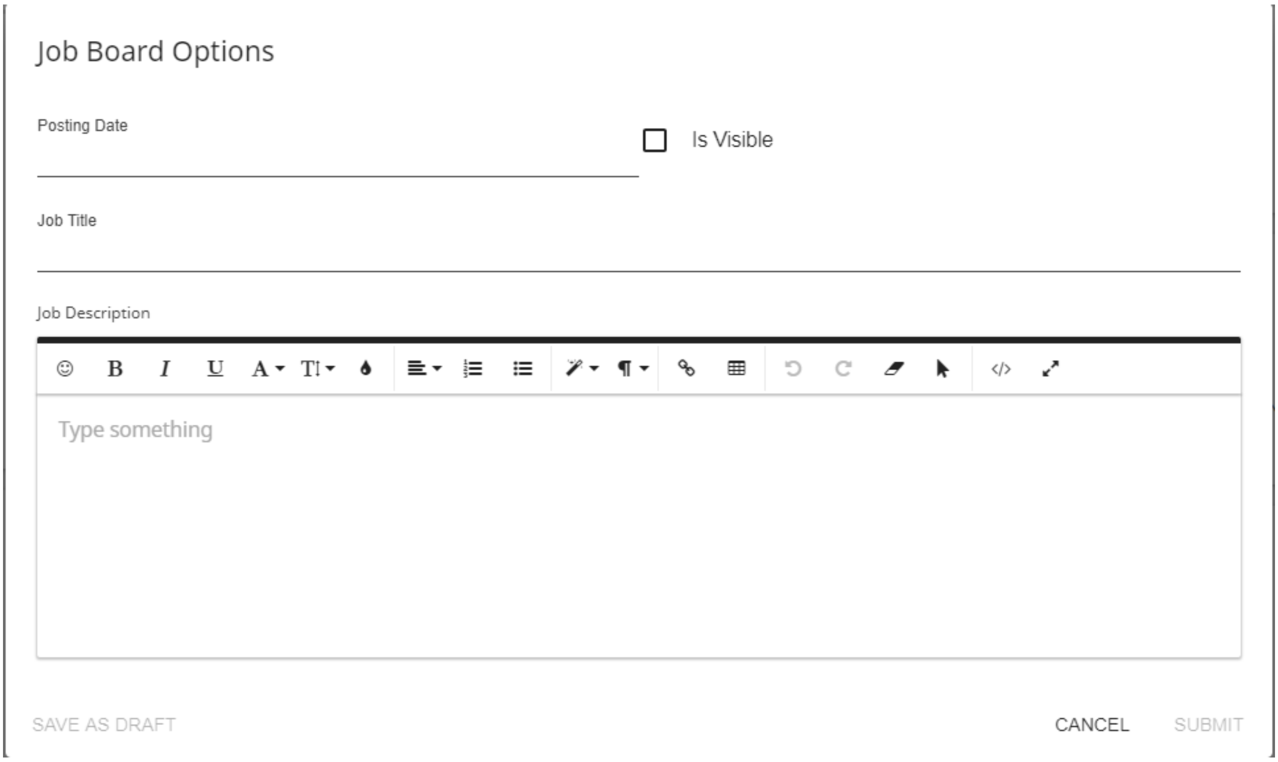
- Beyond - How to Create an Order
- Beyond - Managing Customer Defaults
- Beyond - Searching for Orders & Job Order Statuses



Advanced Order Topics

Check out the following articles for more advanced order options:

- Beyond - Managing Order Interest Codes
- Beyond - Posting Jobs to Your TempWorks Job Board
- Beyond - Utilizing Order Contact Roles
- Beyond - Documents



Order Process Questions to Consider

Download this file as a PDF (click the PDF icon at the top of this article) and take notes or discuss these questions with your team:

Question	Answer
Who will be responsible for talking with customer contacts and creating order records in the system?	
What information needs to be filled out on a customer record before an order is created or filled?	
What information is required on an order before a recruiter can start filling it?	
How is it being communicated to recruiters that there is a new order ready to be filled?	
Will you be using customer defaults including multiplier codes and shifts to help make order creation easier and more accurate?	
Will you be posting to the TempWorks Job Board?	

Related Articles