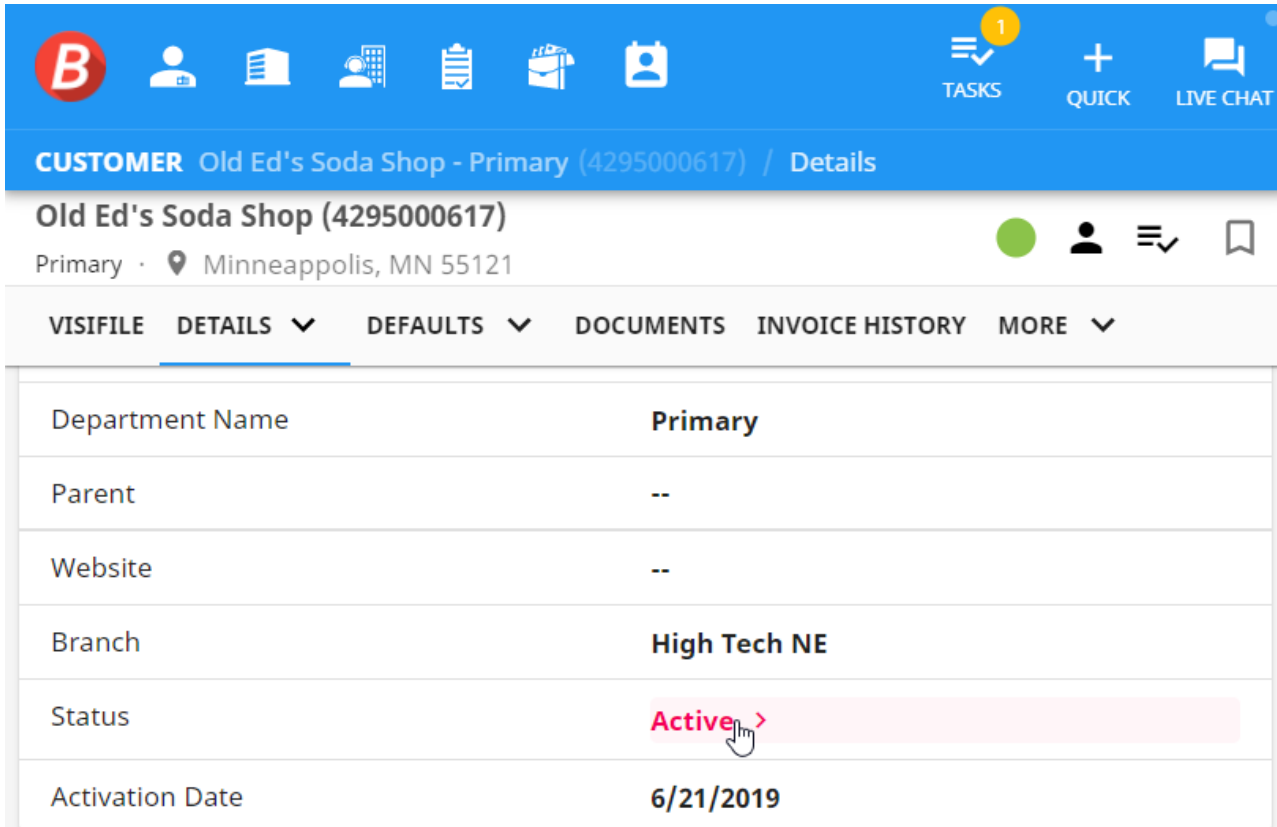


Beyond - Customer Statuses

Last Modified on 09/04/2020 7:56 am CDT

What are Customer Statuses?

Customer records have status options available for your team to communicate which customers have signed contracts and which ones might be in review or in the sales process.



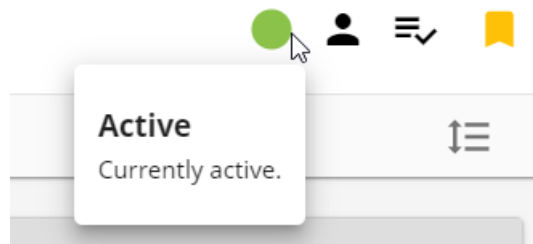
The screenshot shows a customer record interface. At the top, there is a blue navigation bar with icons for home, user, building, phone, clipboard, envelope, and profile. On the right, there are buttons for 'TASKS' (with a notification badge), 'QUICK', and 'LIVE CHAT'. Below the navigation bar, the customer name 'Old Ed's Soda Shop - Primary (4295000617)' is displayed. The main header area shows 'Old Ed's Soda Shop (4295000617)' with a green status indicator, a user icon, a menu icon, and a bookmark icon. Below this, the location 'Primary · Minneapolis, MN 55121' is shown. A horizontal menu contains 'VISIFILE', 'DETAILS' (selected), 'DEFAULTS', 'DOCUMENTS', 'INVOICE HISTORY', and 'MORE'. The main content area is a table with the following rows:

Department Name	Primary
Parent	--
Website	--
Branch	High Tech NE
Status	Active >
Activation Date	6/21/2019

There are two types of status options you can find related to the customer record:

Active Status

The customer record has an active indicator located at the top of the record with any other record charms. This indicator will be lit in green if the customer record you are viewing is active. Otherwise, it will display in a light grey to show it is inactive.



- **Active** records should be any customer you are working with. Whether they are currently in the sales process or you are currently sending employees to them
- **Inactive** records should be customers that you are no longer working with. Perhaps they went out of business

or no longer have staffing needs. This allows you to archive this record for the time being in case you ever need to look back or are restarting a relationship later.

Customer Statuses

Customer statuses provide more information that the active charm on the customer record and can provide additional restrictions as well.

The customer status is located on the details tab under the customer information card or the snapshot card located on the visifile.

CUSTOMER Old Ed's Soda Shop - Primary

Old Ed's Soda Shop (4295000617)

Primary · 📍 Minneappolis, MN 55121

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MORE ▾

^ **Snapshot**

Last Payment	--	YTD Sales	46,855.20
AR Balance	153,529.20	Lifetime Sales	46,855.20
Status	Active >		

By default, customer records start with the status of "Prospect" and need to be changed to Active before an Order can be filled. You can work with our TempWorks Support team to further customize the status options available.

Some Commonly Used Customer Statuses:

1. Prospect: For your sales team to easily track which customers have not signed a contract yet
2. Hold for Credit Check: If you perform credit checks, you can use this status to say a credit check is needed
3. Credit Check in Progress: Once a credit check is in progress you can change the customer to this status
4. Active: Customers with a signed contract that you are ready to do business with can be set to active
5. Do Not Service: If something happens where you need to temporarily pause any new orders use this status to alert your team they should work with management before filling any orders
6. Inactive: For customers that have gone out of business or no longer have staffing needs, you can set them to inactive to archive the record.

How to Change a Customer Status

Note To change a customer status, you must be given permission to change the current status. This is done by an administrator. To learn more, check out [Beyond - Managing Security Groups](#).


Customer Status Security Group

Name	Hierarchy Level
All Customer Status	System
Description	
All Customer Status	
Properties (14)	14 Selected
Filter...	
<input checked="" type="checkbox"/> Active (A)	
<input checked="" type="checkbox"/> Bid (B)	
<input checked="" type="checkbox"/> Credit Check in Progress (C)	

To change a customer status, just click on the status on the snapshot or customer information card. This will open up a sidebar to guide you through changing the status.

The screenshot shows a customer information card for 'Acme Springs (4295000632)' with a 'Snapshot' tab selected. The 'Snapshot' tab displays financial data: Last Payment (--), YTD Sales (0.00), AR Balance (0.00), Lifetime Sales (0.00), and Status (Prospect). A 'Change Status' sidebar is open, showing a list of status options: A (Active), B (Bid), C (Credit Check in Progress), and D (Do Not Service). The current status is 'Prospect'.

1. Select the status from the visifile or the details tab
2. Select the new status in the drop down
3. Review any additional actions needed or recommended:
 - In this example, you can create a message or task while you are changing the status.


 **Change Status**
✕


Acme Springs (4295000632)

Active ▼

Feel free to use any of the following actions, and then save the new status.

ACTIONS

CREATE MESSAGE


CREATE TASK


SAVE STATUS

4. Select Save Status at the bottom to confirm the status change

When you change a customer status, it can change the active charm. For example, if you set a customer record to inactive, it will change the charm to display the inactive grey.

The options available when changing a customer status can be customized. Check out [Beyond - Status Change Workflows](#) for more information.

Searching By Customer Status

When you search for customers by status under the basic customer search, you are searching by the Active Status Charm:

Search / Customers

BASIC

Customer Name

Customer Id

ADVANCED

Status Active

Active
Inactive
Any

Include Departments Yes

RESET
SEARCH

If you want to limit your search to customer records with a particular status, navigate to the advanced search tab and create a new rule for status

☰ Click to select a saved search... ^

NOT **AND** OR

☰ > Active X ▾ IS TRUE ▾ Show in results X

☰ > Include Departments X ▾ IS FALSE ▾ Show in results X

☰ > Status X ▾ EQUALS ▾ Prospect X ▾ Show in results X

+ RULE / GROUP

To learn more about searching options, check out [Beyond - Advanced Searching](#).

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