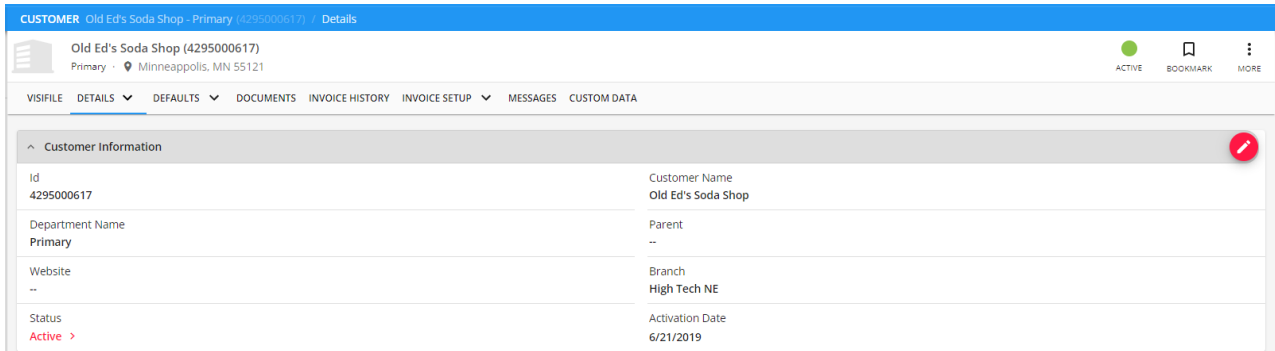


Beyond - Customer Statuses

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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.

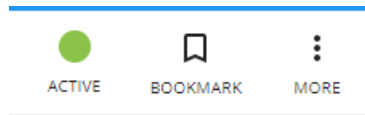


The screenshot shows a customer record for 'Old Ed's Soda Shop' (ID: 4295000617) in a CRM system. The record is marked as 'Active' with a green dot. The record details include: Department Name: Primary, Website: ---, Status: Active, and Activation Date: 6/21/2019. The record is located under the 'Customer Information' card.

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 than 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.

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 a Job Order can be filled. You can work with our [TempWorks Support](#) team to further customize the status options available.

Some Commonly Used Customer Statuses:

- **Prospect:** For your sales team to easily track which customers have not signed a contract yet
- **Hold for Credit Check:** If you preform credit checks, you can use this status to say a credit check is needed
- **Credit Check in Progress:** Once a credit check is in progress you can change the customer to this status
- **Active:** Customers with a signed contract that you are ready to do business with can be set to active
- **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
- **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, users must be within a Customer Status Security Group that contains the intended statuses. To learn more about setting up Security Groups, please see the following article titled [Beyond - Managing Security Groups](#).

Customer Status Security Group

Name

All Customer Status

Hierarchy Level

System

Description

All Customer Status

Properties (14)

14 Selected

Filter...

Active (A)

Bid (B)

Credit Check in Progress (C)

To change a customer status, either click on the status on the snapshot or customer information card or select the "Active" charm within the customer record header and select "Change Status". This will open up a sidebar to guide you through changing the status.

The screenshot shows a customer record for 'Old Ed's Soda Shop - Primary (4295000617)'. The 'Customer Information' table is visible, with the 'Status' field set to 'Active'. A 'Change Status' sidebar is open on the right, showing a dropdown menu with 'Active' selected. The sidebar also contains a text input field and a 'Choose a new status from the options above.' prompt. The 'Change Status' button is highlighted in red in the original image.

Customer Information	
Id	Customer Name
4295000617	Old Ed's Soda Shop
Department Name	Parent
Primary	--
Website	Branch
--	High Tech NE
Status	Activation Date
Active >	6/21/2019

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:
 - o 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

Note Users will only be able to see and edit statuses on the customer record that have been selected for them within their respective Customer Status Security Group.

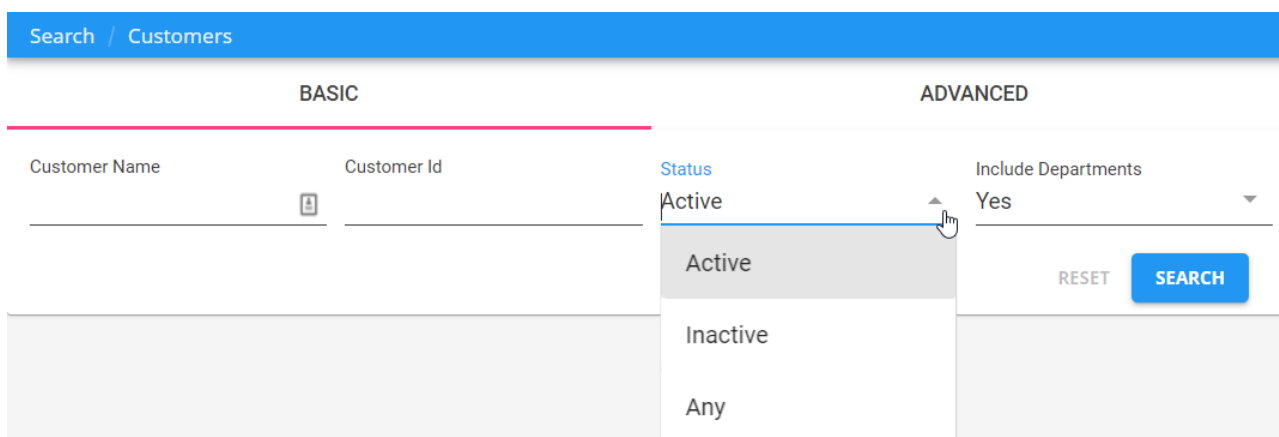
When you change a customer status, it can change the active charm. For example, if you set a customer record to inactive, it will change the charm to display the inactive grey.

Looking for how to deactivate records? Please see the following video:

Note For more information on the options available when changing a customer status, please see the following article titled [Beyond - Status Change Workflows](#).

Searching By Customer Status

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



The screenshot shows a search interface for customers. At the top, there is a blue header with the text "Search / Customers". Below this, there are two tabs: "BASIC" and "ADVANCED". The "BASIC" tab is selected. The search form includes several fields: "Customer Name" with a magnifying glass icon, "Customer Id", "Status" (with a dropdown menu open showing "Active", "Inactive", and "Any" options), and "Include Departments" (with a dropdown menu open showing "Yes"). There are also "RESET" and "SEARCH" buttons.

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

Note For more information around searching options within Beyond, please see the following article titled [Beyond - Advanced Searching](#).

Related Articles