Beyond University: Creating Customer Records

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Welcome to Beyond University!

New to Beyond University? Start Here: Basics: How to Log In & Navigate in Beyond

The Beyond University Orientation Series is meant for all Beyond users to get started in our system. In these lessons, you will learn how to log in and navigate as well as other important basic functionality that all users can benefit from.

Beyond University: Creating Customer Records

Customer records in Beyond can help your team stay organized by keeping track of sales information, statuses, and documents. In this video, we will take a look at how to create a customer record and review a few key features of the record.

Watch the short video before taking the quiz below

Questions to Consider

Before you move on, review the following process questions with your team:

1. Who on your team will be creating customer records in Beyond?
2. Which customer statuses will your team use?
3. What does your sales pipeline look like?
4. What kinds of message actions codes will you be using to log interactions with your customers?

Pop Quiz

Test Your Knowledge with the following quick quiz

Loading Beyond Orientation - Creating Customer Records

Congrats! You've finished this course!

Next Up

Next Course: Beyond University: Managing Customer Contacts

Description: Customer contacts may include hiring managers, supervisors, receptionists, and even members of the c-suite! In this course we break down how to add customer contacts into the system and review a few key sections to utilize on the contact record.

Related Articles