# Beyond University: Customer Defaults

## 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.

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## Beyond University: Customer Defaults

Once a customer signs a contract with your company, you'll want to make sure all the necessary information is set up on the customer record to make creating orders easier. In this video, we will cover creating worksites, customer default tab, and other fields on the customer record that can effect orders.

**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 set up customer defaults when a customer signs a contract?

2.  Will your team be utilizing multiplier codes?

3.  What will your team use required interest codes on the customer record for?

## Pop Quiz

Test Your Knowledge with the following quick quiz

Loading Beyond Orientation - Customer Defaults

Congrats! You've finished this course!

## Next Up

***Next Course:*** Beyond University: Creating Order Records

Description: When the customer communicates to your staffing agency that they are looking for employees, an order should be created to document that request. Once an order is created and populated with details service reps can begin to make assignments. In this video, we review how to create an order in Beyond and look at the order details.

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