Beyond University: Managing Customer Contacts

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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: Managing Customer Contacts

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.

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. What will your team use interest codes for on the contact record?

2. Who will add customer contacts into your system?

Pop Quiz

Test Your Knowledge with the following quick quiz

Loading Beyond Orientation - Creating Contacts

Congrats! You've finished this course!

Next Up

Next Required Course: Beyond University: Customer Defaults

Description: 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.

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