

Beyond University: Creating Order 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 Order Records

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.

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 order records?

2. What information on the order is most important to fill out right away on an order?
3. How will you receive new orders from your customers? (email? order form? phone call?)

Pop Quiz

Test Your Knowledge with the following quick quiz

Loading [Beyond Orientation - Creating an Order](#)

Congrats! You've finished this course!

Next Up

Next Course: [Beyond University: Order & Assignment Searching](#)

Description: Advanced searching in Beyond can save you time and help you find the specific results you're looking for. Although, it can be confusing trying to determine if you should search by orders or assignments. This video clearly outlines the differences between the two and when to search for orders versus when to search for assignments.

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