

# Beyond - Customer Required Documents

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## Overview

Required documents allow you to store, track, and manage documents that are required for employees.

Users in Beyond have the ability to add and manage required documents on Customer, Job Order, and Employee records.

**\*Note\*** Required Document functionality is backwards compatible between Enterprise and Beyond. This means when a Required Document is created, modified, or removed within Enterprise, the same take place within Beyond. The process is the same from Beyond to Enterprise.

**\*Note\*** In order to view/add/edit Required Documents in Beyond, you must have the proper Security Group of Document Type with Read/Write permissions.

This article covers the following for Customer Required Documents:

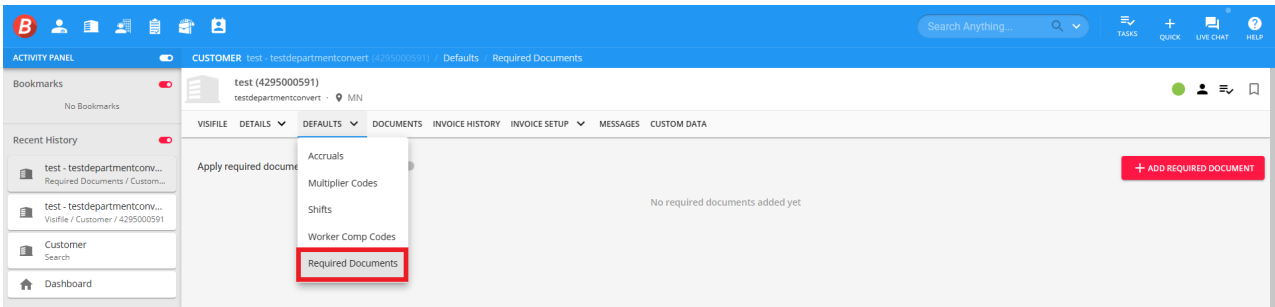
1. [Adding Customer Required Documents](#)
2. [Apply Required Documents to Departments](#)
3. [Editing Customer Required Documents](#)
4. [Deleting Customer Required Documents](#)

**\*Note\*** This article is part of a series that outlines how to utilize Required Documents in Beyond. For more information, please see the following articles:

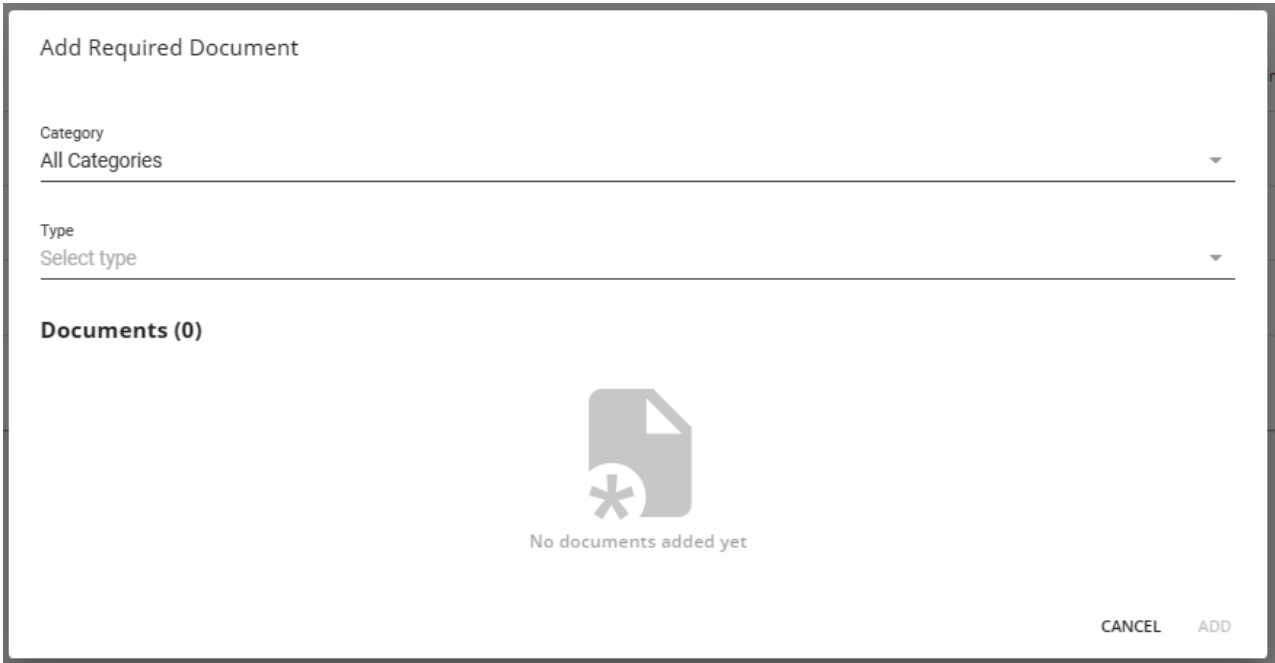
- [Beyond - Required Document Types](#)
- [Beyond - Employee Required Documents](#)
- [Beyond - Job Order Required Documents](#)

## Adding Customer Required Documents

Begin by navigating to the Customer record > Defaults > Required Documents:



Select the option for "+ Add Required Document" at the top right to open the window for adding a required document:



Select the following:

- **Category:** The category of the Required Document Type.
- **Type:** The Required Document Type.

**\*Note\*** You are able to add more than one Required Document at a time. Continue to select the Required Documents from the "Type" dropdown and they will appear within the "Documents" list:

Add Required Document




Category  
All Categories

---

Type  
Select type

---

**Documents (3)**

*	
OSP test	
Drivers License	

CANCEL ADD

You can also remove a Required Document from the list by selecting the Trash Can icon to the right of the item:

Add Required Document




Category  
All Categories

---

Type  
Select type

---

**Documents (3)**

*	
OSP test	
Drivers License	

CANCEL ADD

Once all of the Required Documents have been added for the Customer, select "Add" at the bottom right:

### Add Required Document

Category  
All Categories

---

Type  
Select type

---

**Documents (3)**

- \*
- OSP test
- Drivers License

CANCEL **ADD**

You will now see the added Required Documents within the main list on the Customer record:

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VISIFILE DETAILS DEFAULTS DOCUMENTS INVOICE HISTORY INVOICE SETUP MESSAGES CUSTOM DATA

Apply required documents to departments  + ADD REQUIRED DOCUMENT

Type ↑	Category	Notes	Required
Drivers License			
OSP test	HR Document	yftdrhjkyg	
SQL Test Results	HR Document		✓

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Once the Required Documents have been added to the Customer record, you can do the following:

- Apply Required Documents to Customer Departments
- Edit
- Delete

## Apply Required Documents to Departments

To allow Required Documents to apply to all Customer Departments, select the toggle that states "Apply required documents to departments":

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VISIFILE DETAILS DEFAULTS DOCUMENTS INVOICE HISTORY INVOICE SETUP MESSAGES CUSTOM DATA

Apply required documents to departments  + ADD REQUIRED DOCUMENT

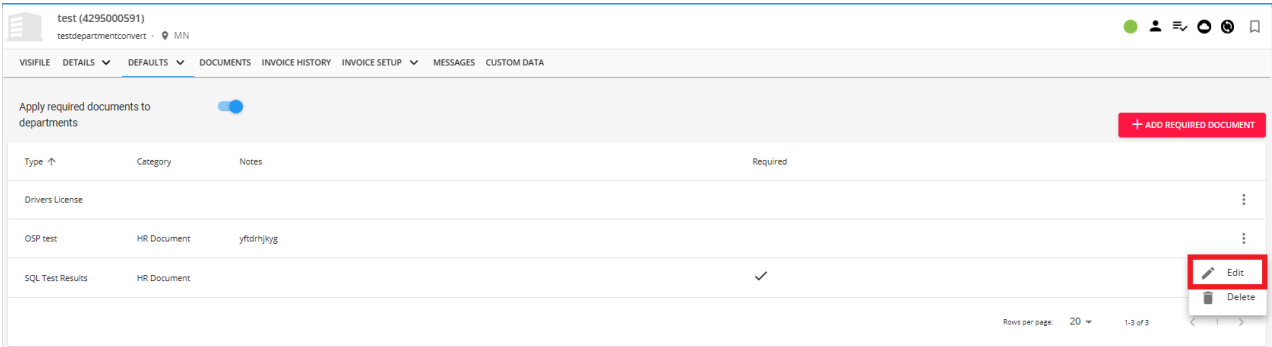
Type ↑	Category	Notes	Required
Drivers License			
OSP test	HR Document	yftdrhjkyg	
SQL Test Results	HR Document		✓

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**\*Note\*** When adding Required Documents to a specific Department of a Customer, the new Required Documents will overwrite the originals that had been added by selecting the "Apply required documents to departments" toggle on the Parent Customer record.

## Editing Customer Required Documents

To edit a required document within the list, select the  icon to the right of the item and select "Edit":



Type ↑	Category	Notes	Required
Drivers License			
OSP test	HR Document	yfdahjlyg	
SQL Test Results	HR Document		✓

Within the "Edit Required Document" window, you will be able to modify the following:

- Required
- Notes



**Edit Required Document**

Category  Required

\* Type  
Drivers License

Notes

SAVE AS DRAFT CANCEL SUBMIT

Once the changes are complete, select "Submit" for the changes to be saved.

**\*Note\*** When creating a Job Order for a Customer that has Required Documents listed, only those that are listed as "Required" will appear when the Job Order is created:

Type ↑	Category	Notes	Required
Drivers License			
OSP test	HR Document	yfdrhjygg	
SQL Test Results	HR Document		✓

If a Job Order is created for a Customer that has a Required Document listed as "Not Required", that document will not show as Required for the Job Order:

Type ↑	Category	Notes	Required
Drivers License			✓
OSP test	HR Document	yfdrhjygg	
SQL Test Results	HR Document		✓

## Deleting Customer Required Documents

To delete a required document within the list, select the  icon to the right of the item and select "Delete":

Type ↑	Category	Notes	Required
Drivers License			
OSP test	HR Document	yfdrhjygg	
SQL Test Results	HR Document		✓

You will receive a confirmation prompt asking if you are sure you want to delete the specific Required Document from the Customer record:

**Confirm Delete**

Are you sure you would like to delete **OSP test**?

NO    YES

Select "Yes" to confirm the deletion and once deleted, the Required Document will be removed from the list entirely:

test (4295000591)  
testdepartmentconvert · MN

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MESSAGES CUSTOM DATA

Apply required documents to departments  + ADD REQUIRED DOCUMENT

Type ↑	Category	Notes	Required
Drivers License			
SQL Test Results	HR Document		✓

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- [Beyond - Employee Required Documents](#)
- [Beyond - Job Order Required Documents](#)

## Related Articles