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:

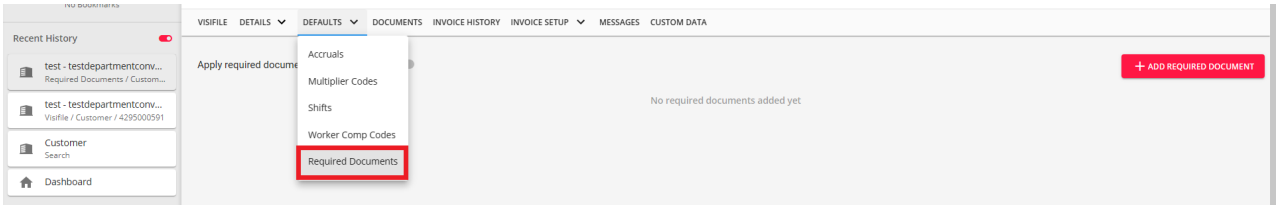
1. Adding Customer Required Documents
2. Apply Required Documents to Departments
3. Editing Customer Required Documents
4. Deleting Customer Required Documents

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:

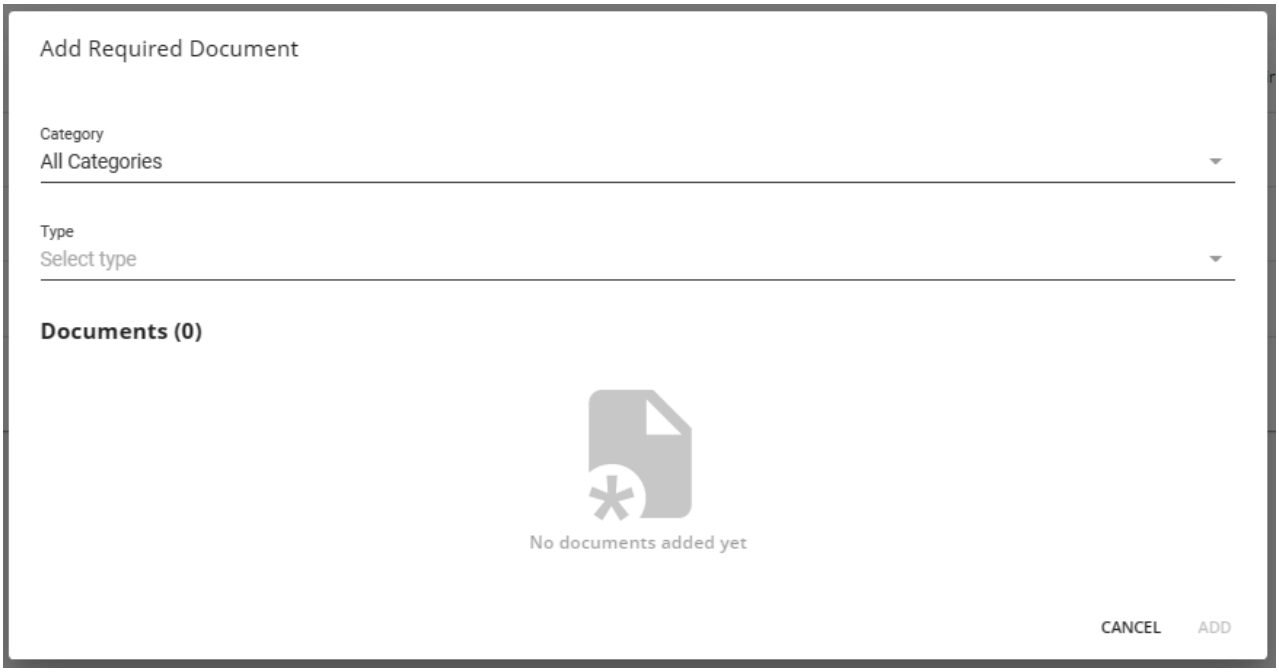
- Beyond - Required Document Types
- Beyond - Employee Required Documents
- Beyond - Job Order Required Documents

Adding Customer Required Documents

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



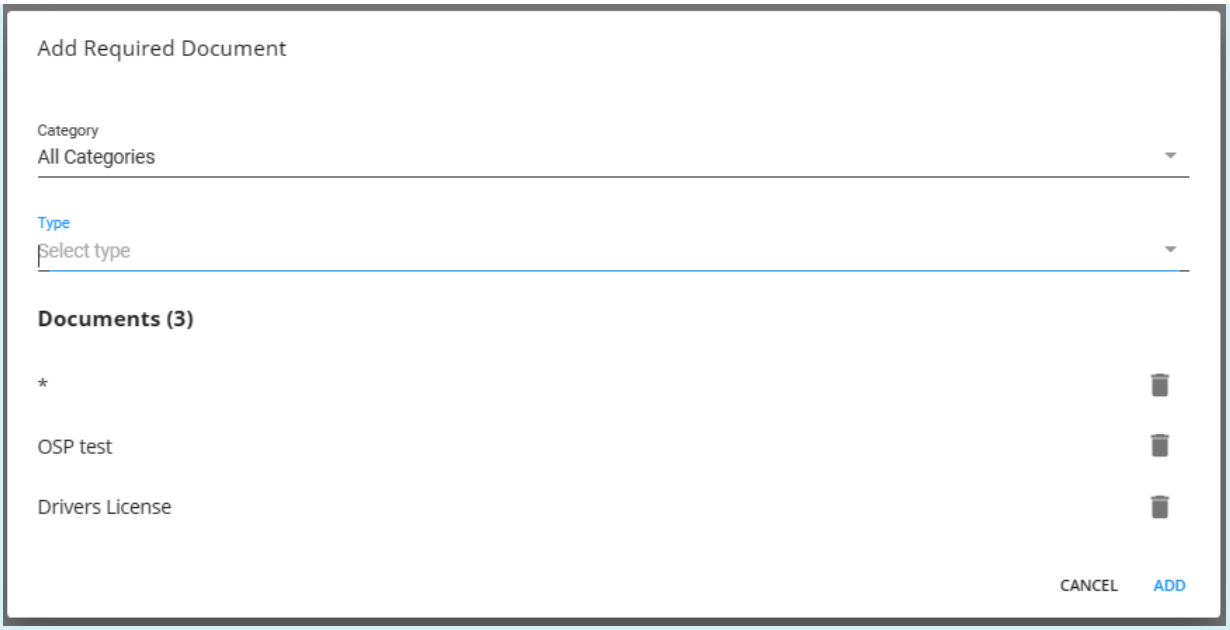
Select the option for "+ Add Required Document" at the top right to open the window for adding a required document:



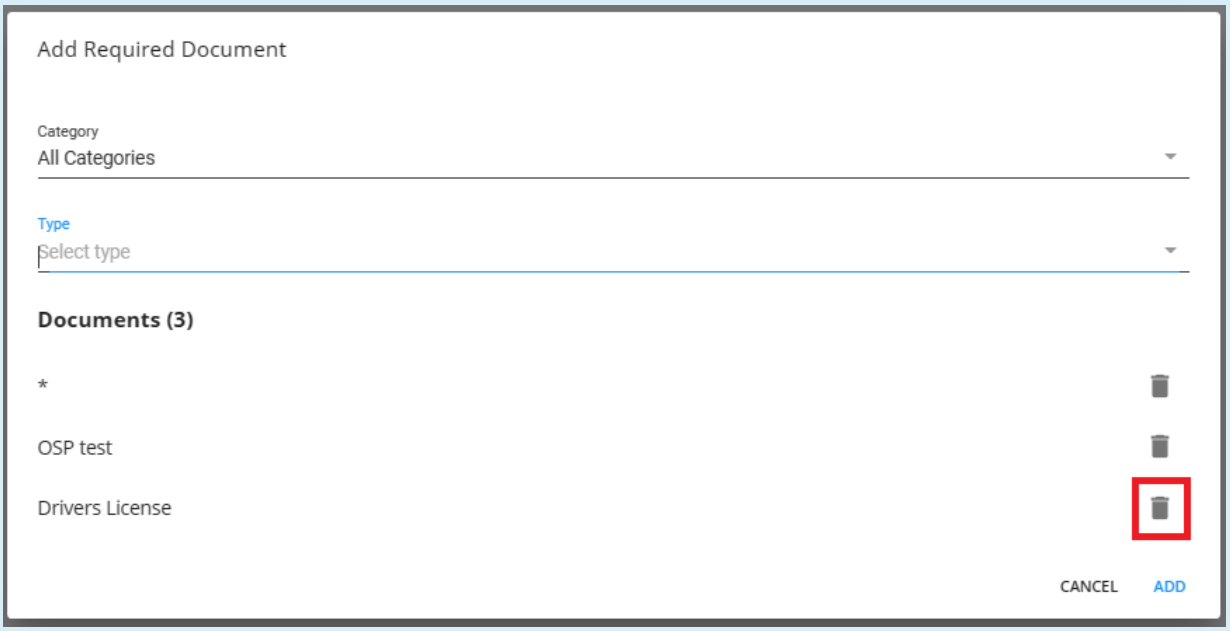
Select the following:

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

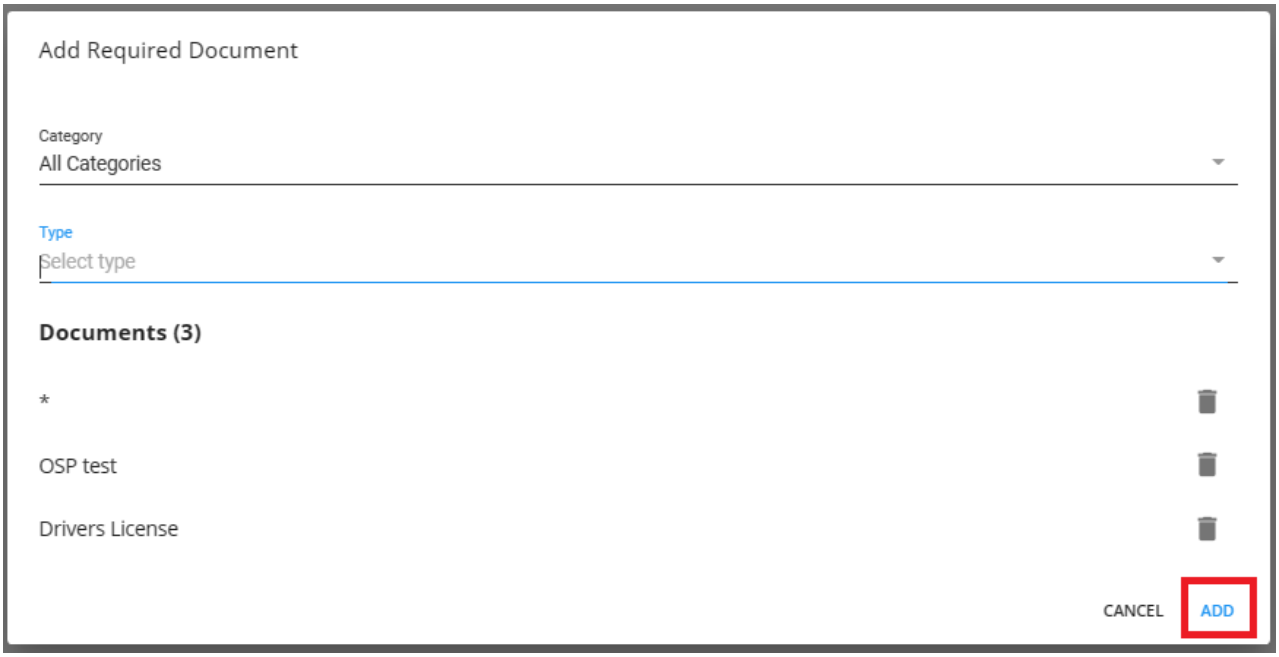
Note You are able to add more than one Required Document at a time. Continue to select the Required Documents from the "Type" dropdown and they will appear within the "Documents" list:



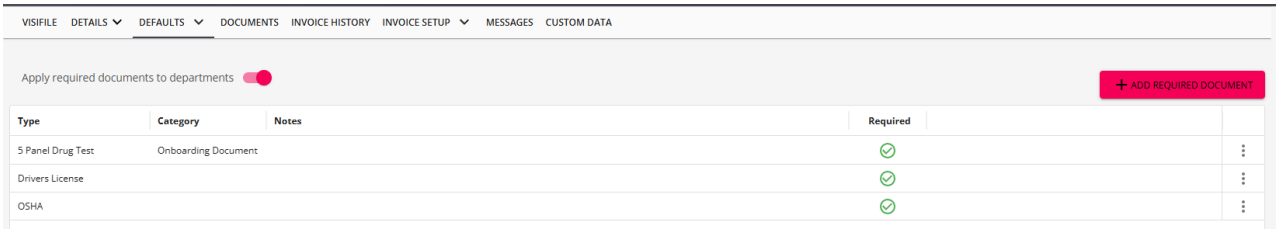
You can also remove a Required Document from the list by selecting the Trash Can icon to the right of the item:



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



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

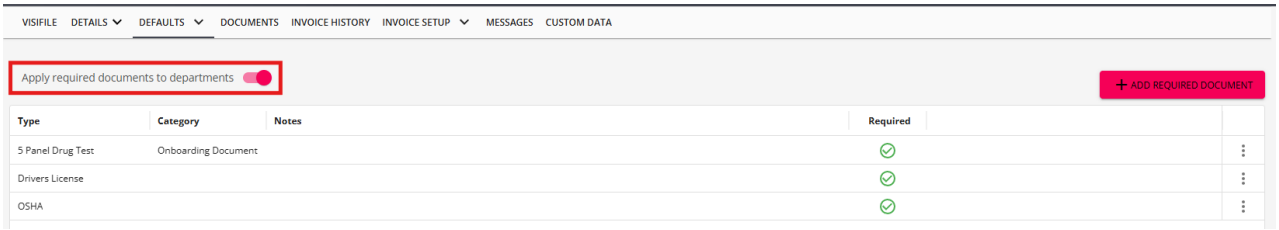


Once the Required Documents have been added to the Customer record, you can do the following:

- Apply Required Documents to Customer Departments
- Edit
- Delete

Apply Required Documents to Departments

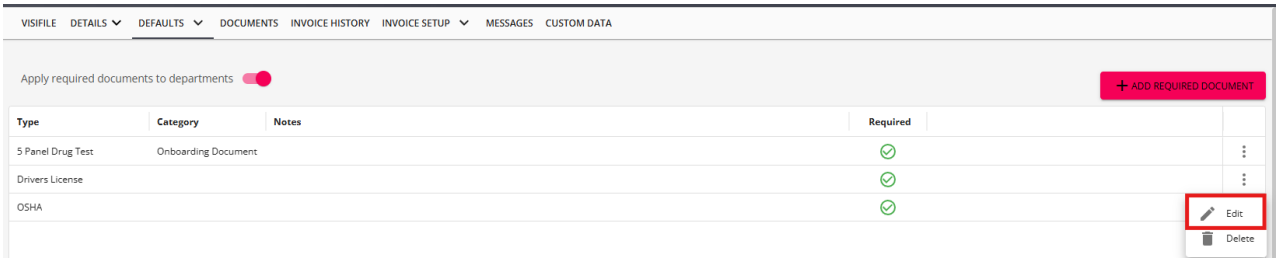
To allow Required Documents to apply to all Customer Departments, select the toggle that states "Apply required documents to departments":



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.

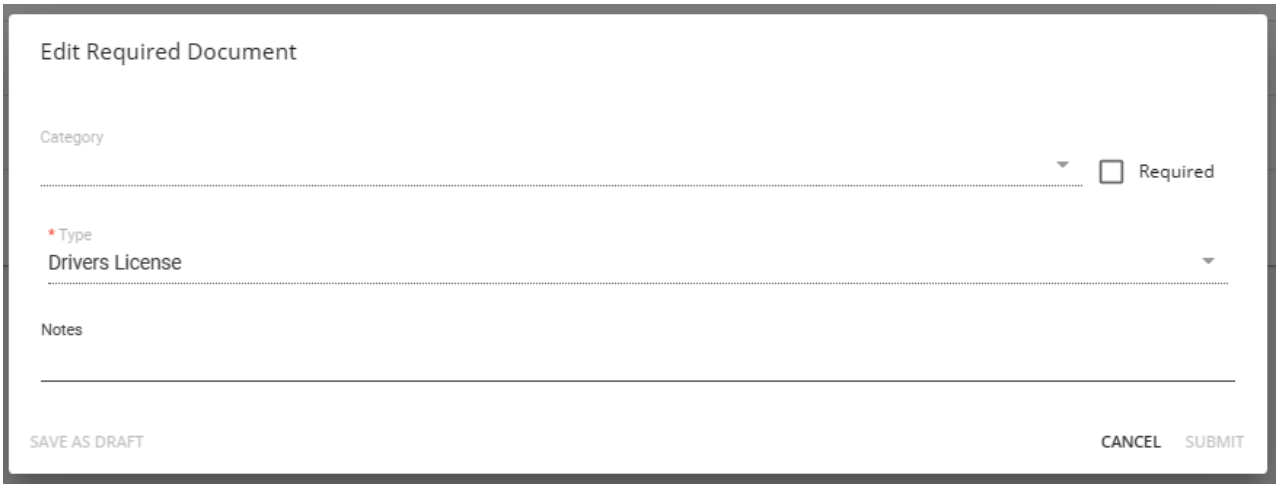
Editing Customer Required Documents

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



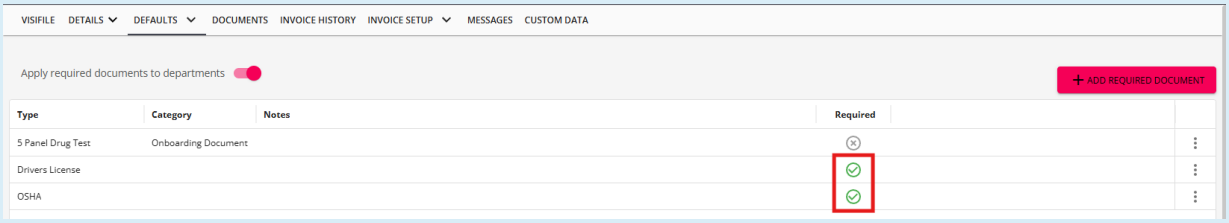
Within the "Edit Required Document" window, you will be able to modify the following:

- Required
- Notes

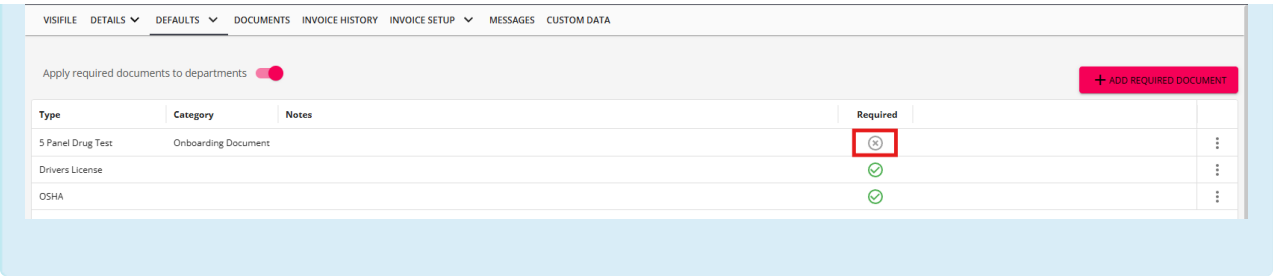


Once the changes are complete, select "Submit" for the changes to be saved.

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:

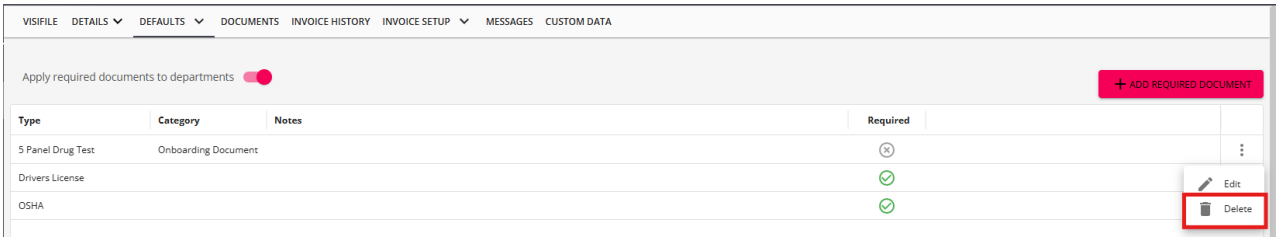


If a Job Order is created for a Customer that has a Required Document listed as "Not Required", that document will not show as Required for the Job Order:

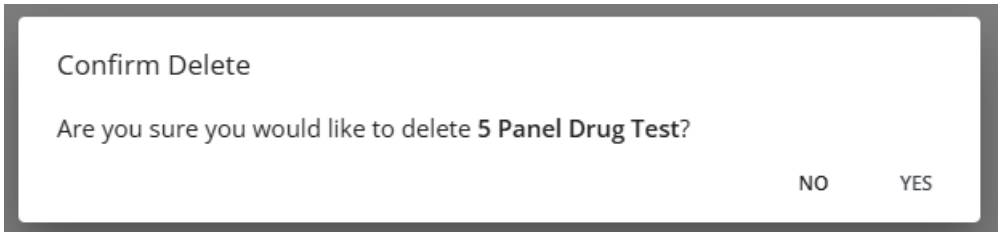


Deleting Customer Required Documents

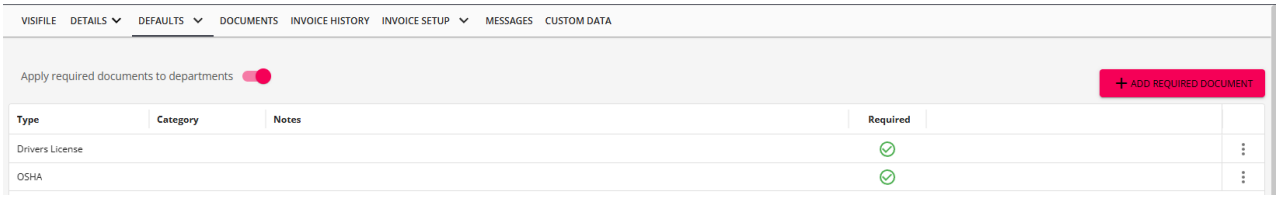
To delete a required document within the list, select the ⋮ icon to the right of the item and select "Delete":



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



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



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

Related Articles