

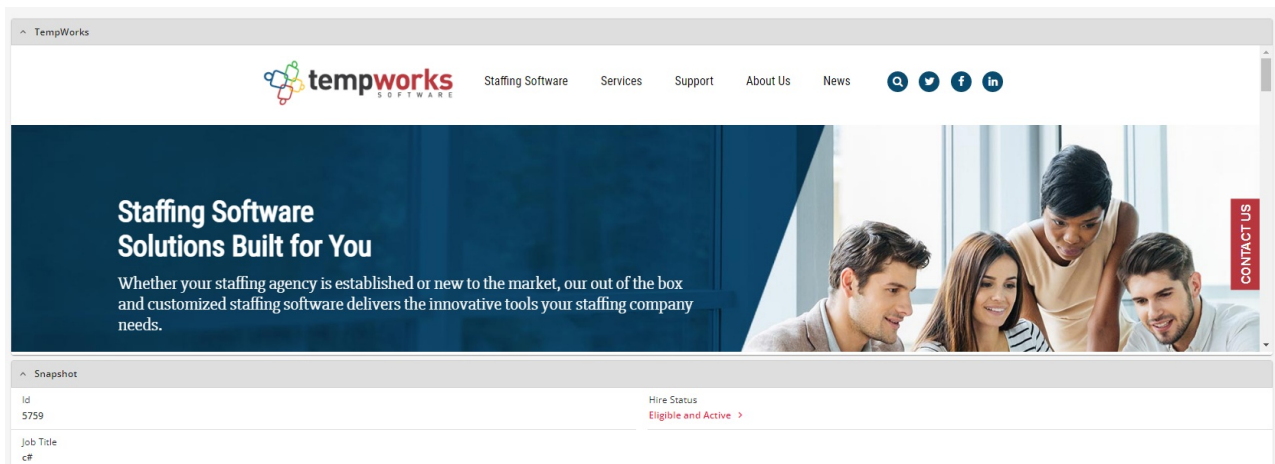
Beyond - How to Create and Utilize Cards and Pages

Last Modified on 07/31/2024 10:41 am CDT

Overview

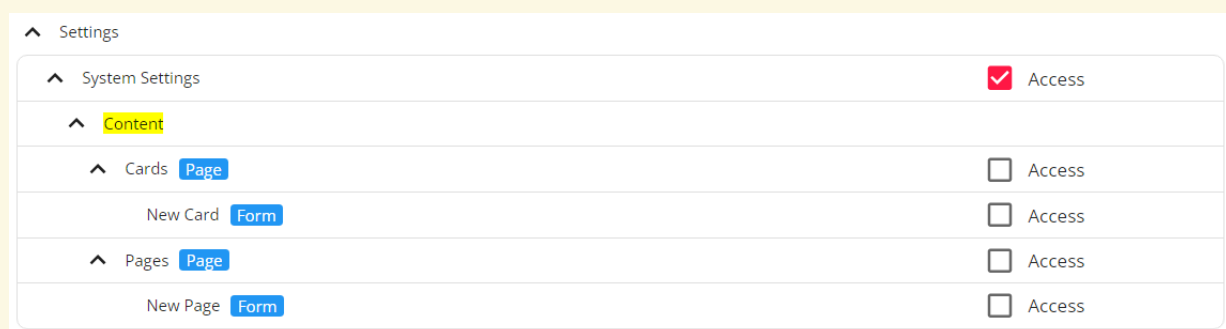
Users can create custom cards and pages to be displayed on the Employee, Customer, Contact, Assignment, and/or Job Order records in Beyond.

An example of this functionality is showing an outside webpage as a card on the employee profile within Beyond:



Note To setup and utilize custom cards and pages, users will need access to System Settings in Beyond.

As an additional setup point, for users utilizing [Security Groups with Advanced Permissions](#), access will need to be granted for cards and pages within Settings > System Settings > Content within the Advanced Permissions section of that Security Group.



This article covers the following:

Cards

1. [Creating Cards](#)

2. Utilizing Cards
3. Editing Cards
4. Deleting Cards

Pages

1. Creating Pages
2. Utilizing Pages
3. Editing Pages
4. Deleting Pages

Note TempWorks Integration Partners can use the custom cards and pages functionality in Beyond to allow users to utilize the respective integration without having to navigate away from the instance of Beyond.

Data Frenzy is a TempWorks Integration Partner that utilized this functionality to allow for job order distribution to third-party job feeds, employee messaging, and more.

Employee Record - Employee Page in DataFrenzy

Data Frenzy Home | Texting History (2) | Team Candidate Review | Interview Scheduling

SMS History: 2 Unread | 14 Sent | 2 Received

Sent by: Keith_Duarte on Oct 29, 2021 12:21pm PDT Delivered

We are interested in meeting with you. Click this link <https://dfrenzy.com/cCu1b> to schedule an interview within the next few days.

Sent by: Keith_Duarte on Oct 29, 2021 12:43pm PDT Delivered

I am interested in talking to you. Click this link <https://dfrenzy.com/E4mie> to pick a convenient time for us to get on a phone call.

Sent by: Keith_Duarte on Jan 3, 2022 9:25am PST Delivered

Type your text message here. Best Practice: Keep messages less than 160 characters

All Inbound & Outbound text messages save as a Note on the Candidate record in Tempworks.

Employee Record - SMS Texting

SMS History: 2 Unread | 14 Sent | 2 Received

Received on Oct 28, 2021 2:16pm PDT

We are interested in meeting with you. Click this link <https://dfrenzy.com/l4HDD> to schedule an interview within the next few days.

Sent by: Keith_Duarte on Oct 29, 2021 12:21pm PDT Delivered

We are interested in meeting with you. Click this link <https://dfrenzy.com/cCu1b> to schedule an interview within the next few days.

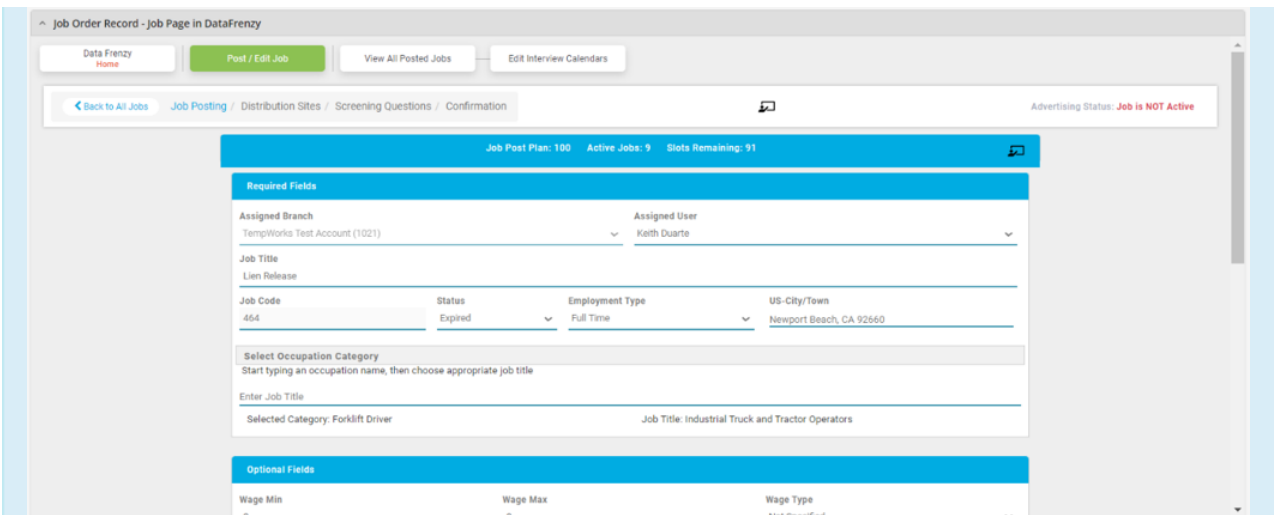
Sent by: Keith_Duarte on Oct 29, 2021 12:43pm PDT Delivered

I am interested in talking to you. Click this link <https://dfrenzy.com/E4mie> to pick a convenient time for us to get on a phone call.

Sent by: Keith_Duarte on Jan 3, 2022 9:25am PST Delivered

Type your text message here. Best Practice: Keep messages less than 160 characters

All Inbound & Outbound text messages save as a Note on the Candidate record in Tempworks.



For more information on this functionality, please see the article titled [Data Frenzy Integration](#).

Cards

Custom cards allow for the viewing of external websites on Employee, Customer, Contact, Assignment, and/or Job Order records in Beyond.

Creating Cards

Begin by navigating to Beyond > B Menu > System Settings > Content > Cards.

The "Content" page will open, showing all the custom cards that have been created:

Name	Record Type	Hierarchy	Publish Status	
Assignment Custom Content	Assignment	System	Published	⋮
Assignment Existing Content Card	Assignment	QAAutomation	Published	⋮
Contact Existing Content Card	Contact	QAAutomation	Published	⋮

To create a custom card, select the "+ New Card" option at the top right to open the "New Card" window:

New Card

*** Hierarchy**
Select... ▾

*** Assign to Record Type**
Select... ▾

*** Name**

Card name must be unique per record type

*** URL**

URL source of the iframe

Size

Small Large

Note

- Once you publish a card, you cannot unpublish it - you can only edit or delete it.
- Consider saving a draft if you are not ready to publish. You can add drafts to your VISIFILE to preview them.

CANCEL SAVE ▾

Url template fields ✕

Insert template fields to inject specific values into the iframe url.

[LEARN MORE](#) [GOT IT](#)

Within the "New Card" window, you will be able to add the following:

- Hierarchy:** The Hierarchy level the new card is set to.
- Assign to Record Type:** The Record Type (Employee, Customer, Contact, Assignment, or Job Order) this card can be added to.
- Name:** The name of the card that is being created.
- URL:** The external URL whose webpage will display within the card.
- URL Template Fields:** Indicated by , this can be used to insert template fields provided by TempWorks into the URL.
- Size:** Choose whether the card will be either small or large.

Note The "URL Template Fields" are able to be used by TempWorks Integration Partners, including Data Frenzy.

Therefore, unless the fields are being added to utilize services provided by TempWorks Integration Partners, it is recommended that these fields are not used.

Adding the URL Template Fields into a standard URL will cause the card to not display information.

Enter the information within the required fields. For this example, we will be adding the TempWorks homepage as a card on an Employee record:

New Card

* Hierarchy High Tech Staffing * Assign to Record Type Employee

* Name TempWorks Homepage

* URL https://www.tempworks.com/

URL source of the iframe

Size

Small Large

Note

- Once you publish a card, you cannot unpublish it - you can only edit or delete it.
- Consider saving a draft if you are not ready to publish. You can add drafts to your VISIFILE to preview

Publish

Save

CANCEL SAVE

Once the required fields have been populated, select one of the following options from the "Save" dropdown:

- **Save:** This will save the card as a draft.
- **Publish:** This will publish the card to be used on the Record Type selected.

New Card

* Hierarchy High Tech Staffing * Assign to Record Type Employee

* Name TempWorks Homepage

* URL https://www.tempworks.com/

URL source of the iframe

Size

Small Large

Note

- Once you publish a card, you cannot unpublish it - you can only edit or delete it.
- Consider saving a draft if you are not ready to publish. You can add drafts to your VISIFILE to preview

Publish

Save

CANCEL SAVE

Note As shown within the "New Card" window:

- Once a card has been published, it can only be edited or deleted.

- If saving as a draft, this can be previewed on your Visifile before publishing.

Once saved or published, the card will be shown within the "Content" page:

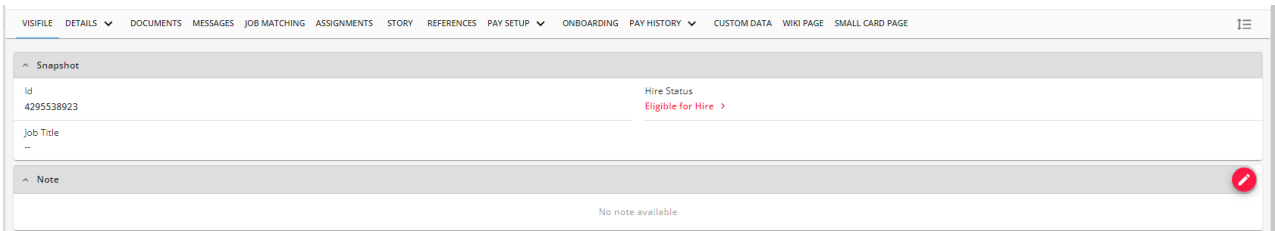
Name ↑	Record Type	Hierarchy	Publish Status
Assignment Custom Content	Assignment	System	Published
Assignment Existing Content Card	Assignment	QAAutomation	Published
Contact Existing Content Card	Contact	QAAutomation	Published
Custom Content Test	Employee	System	Published
Custom Content Test	Employee	High Tech Staffing	Published
Customer Existing Content Card	Customer	QAAutomation	Published
DataFrenzy Employee Page	Employee	System	Published
DataFrenzy Job Order Page	Job Order	System	Published
DF Company Setup Card	Employee	System	Published
Employee Existing Content Card	Employee	QAAutomation	Published
Employee SMS Texting	Employee	System	Published
Hotlist Card Advanced Permission	Employee	High Tech SE	Published
Order Existing Content Card	Job Order	QAAutomation	Published
TempWorks Homepage	Employee	High Tech Staffing	Published
TempWorks Website	Employee	System	Published


Utilizing Cards

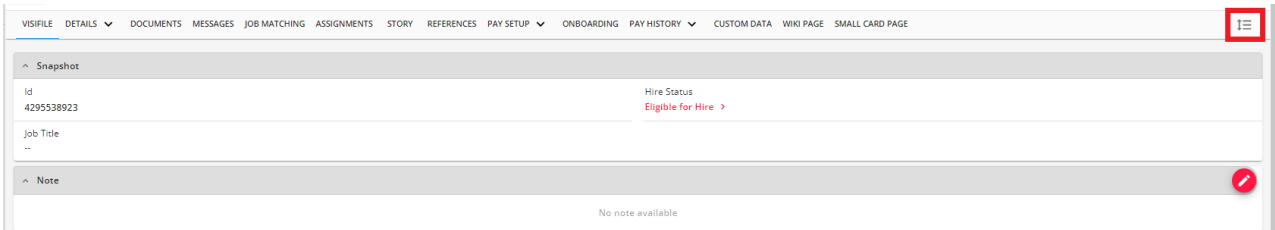
Once the card has been published, navigate to the Record Type (Employee, Customer, Contact, Assignment, or Job Order) the card was setup for. For our example, this is the Employee record:

Note For users utilizing [Security Groups with Advanced Permissions](#), access will need to be granted for the individual cards and pages within Settings > System Settings > "Record Type" within the Advanced Permissions section of that Security Group.

BY PAGE	BY FIELD	Access
Employee		<input checked="" type="checkbox"/> Access
Visifile Page		<input checked="" type="checkbox"/> Access
Data Frenzy Employee Card		<input checked="" type="checkbox"/> Access
Data Frenzy Setup Card Card		<input checked="" type="checkbox"/> Access
Data Frenzy SMS Card		<input checked="" type="checkbox"/> Access
Data Frenzy Employee Page		<input checked="" type="checkbox"/> Access
Data Frenzy Employee Card		<input checked="" type="checkbox"/> Access
Data Frenzy SMS Page		<input checked="" type="checkbox"/> Access
Data Frenzy SMS Card		<input checked="" type="checkbox"/> Access



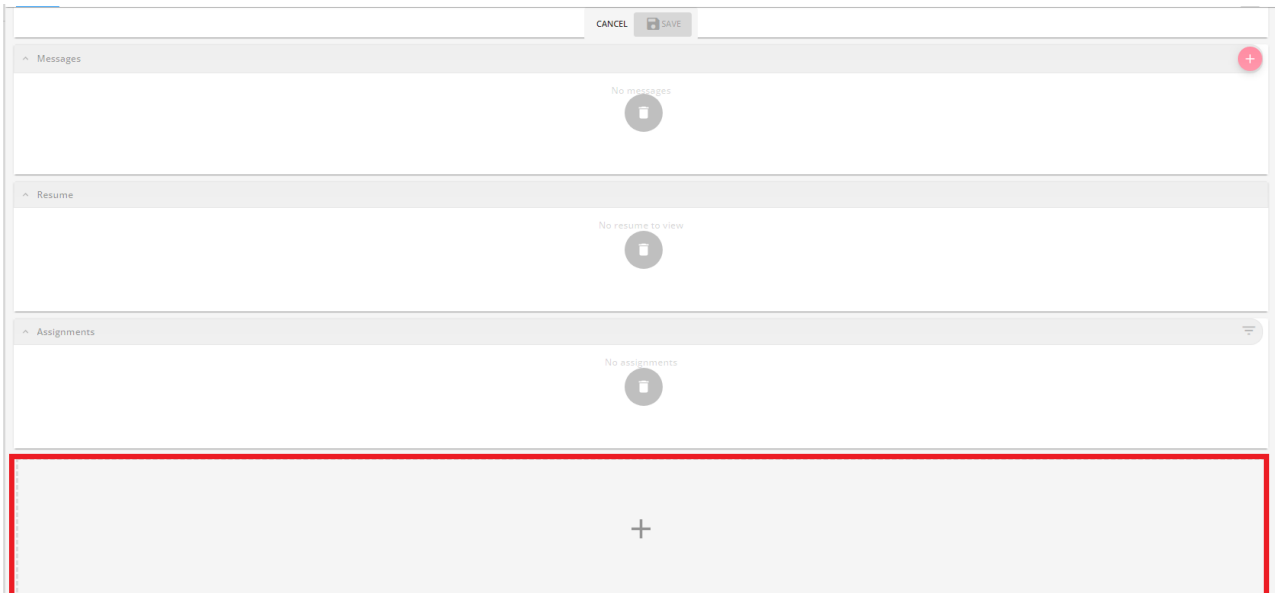
Once on the Employee Visifile, select the  ("Edit Layout") button at the top right. This is where the card will be added:



Note Cards will need to be added on a per-record basis.

If you would like the card to show for all records related to that Record Type, the card(s) will need to be added to a new page for that respective Record Type.

Navigate to the bottom of the editing window and select the "+" to add a new card:



Find the new card within the "Add Card" window, select it, and select "Add (1 Selected)":

Add Card

Filter available cards...

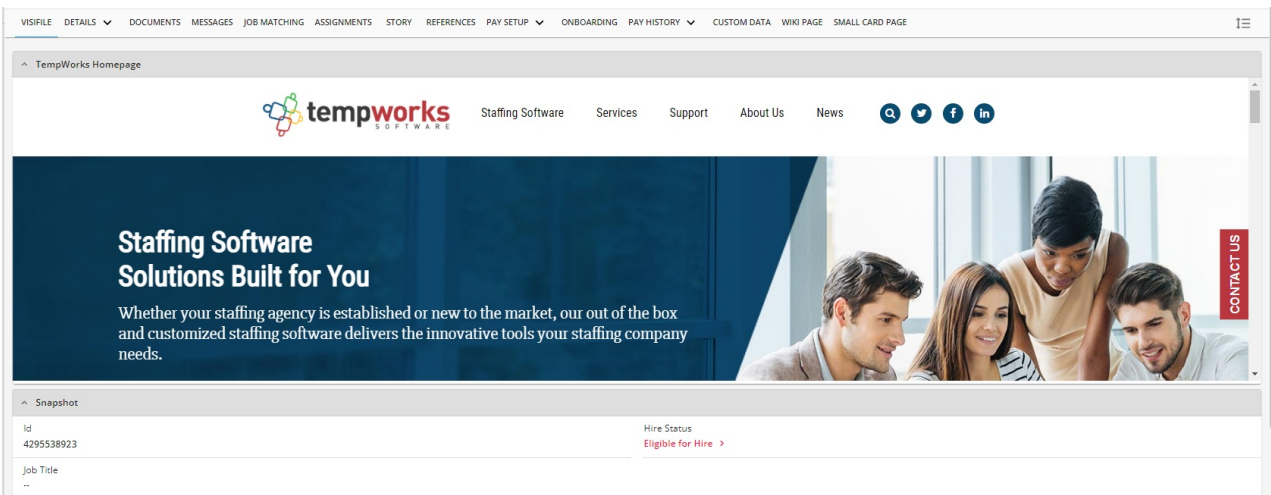
- Custom Data Two
- Documents
- Employee Background Information
- Employee Existing Content Card
- Equal Employment Opportunity
- First Card
- Hiring
- How Heard Of
- Identification
- Interest Codes
- Payment Options
- Personal
- Small card
- TempWorks Homepage
- Time Clock Authentication
- Web User Details
- Web User Products
- Wiki Page for London
- Wikipedia

CANCEL **ADD (1 SELECTED)**

Once the card has been added to the Employees Visifile, you can click and drag the card to the position you want it to appear. Once it is in the intended location, select "Save":

The screenshot shows the 'Employees Visifile' interface. At the top, there is a navigation bar with various menu items: VISIFILE, DETAILS, DOCUMENTS, MESSAGES, JOB MATCHING, ASSIGNMENTS, STORY, REFERENCES, PAY SETUP, ONBOARDING, PAY HISTORY, CUSTOM DATA, WIKI PAGE, and SMALL CARD PAGE. Below the navigation bar, there is a 'CANCEL' button and a 'SAVE' button, both highlighted with a red box. The main content area displays a card titled 'TempWorks Homepage'. The card features the TempWorks logo, the text 'tempworks SOFTWARE', and navigation links for 'Staffing Software', 'Services', 'Support', 'About Us', and 'News'. Below the card, there is a 'Snapshot' section with fields for 'Id' (4295538923) and 'Job Title' (---). The 'Hire Status' is 'Eligible for Hire' with a red arrow pointing right.


Upon saving, the new card will appear within the Employees Visifile:

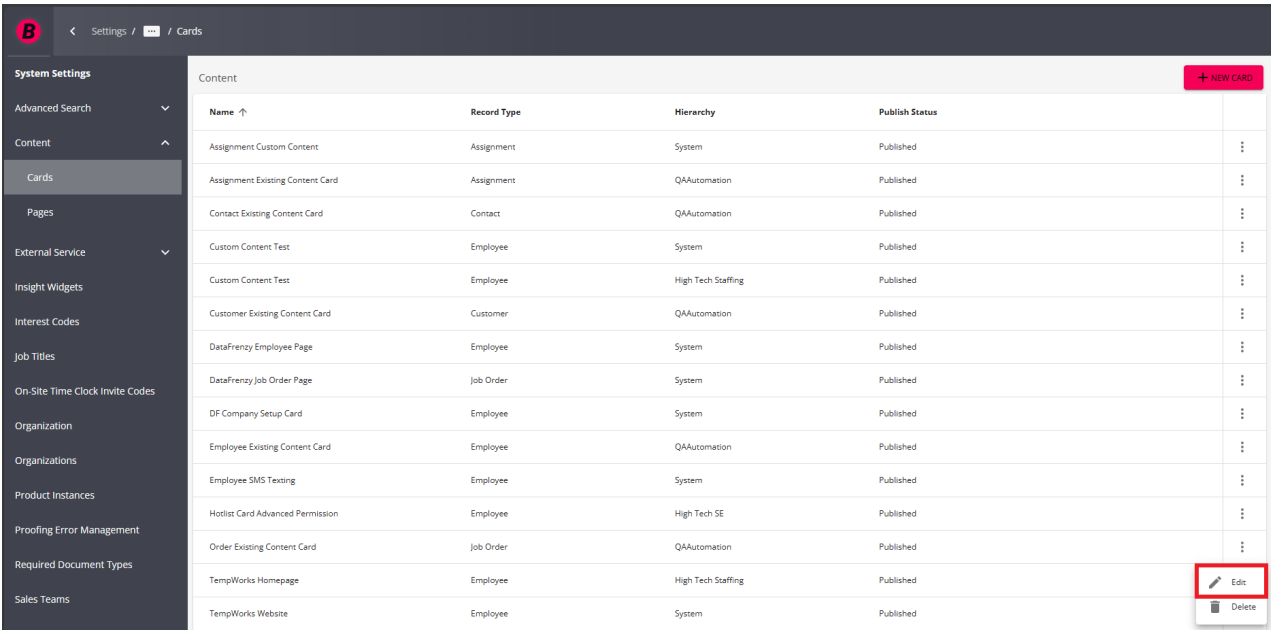


Note The adding and viewing of cards on a Record Type in Beyond can be further controlled by Advanced Security Permissions.

For more information on this, please see the article titled [Beyond - Creating Security Groups with Advanced Permissions](#).

Editing Cards

Once a card has been saved as a draft or published, it can be edited by navigating to Beyond > B Menu > System Settings > Content > Cards, selecting  to the right of the card, and selecting "Edit":



Within the "Edit Card" window, you will be able to edit the following:

- **Name:** The name of the card that is being created.
- **URL:** The external URL whose webpage will display within the card.

- **Size:** Choose whether the card will be either small or large.

Once the changes have been made to the card, select "Submit":

Edit Card

Hierarchy Level
High Tech Staffing

Assign to Record Type
Employee

* Name
TempWorks Website

* URL
https://www.tempworks.com/

URL source of the iframe

Size

Small Large

CANCEL SUBMIT

Deleting Cards

Once a card has been saved as a draft or published, it can be deleted by navigating to Beyond > B Menu > System Settings > Content > Cards, selecting to the right of the card, and selecting "Delete":

B < Settings / / Cards

System Settings

Advanced Search

Content

Cards

Pages

External Service

Insight Widgets

Interest Codes

Job Titles

On-Site Time Clock Invite Codes

Organization

Organizations

Product Instances

Proofing Error Management

Required Document Types

Sales Teams

Name	Record Type	Hierarchy	Publish Status	
Assignment Custom Content	Assignment	System	Published	⋮
Assignment Existing Content Card	Assignment	QAAutomation	Published	⋮
Contact Existing Content Card	Contact	QAAutomation	Published	⋮
Custom Content Test	Employee	System	Published	⋮
Custom Content Test	Employee	High Tech Staffing	Published	⋮
Customer Existing Content Card	Customer	QAAutomation	Published	⋮
DataFrenzy Employee Page	Employee	System	Published	⋮
DataFrenzy Job Order Page	Job Order	System	Published	⋮
DF Company Setup Card	Employee	System	Published	⋮
Employee Existing Content Card	Employee	QAAutomation	Published	⋮
Employee SMS Texting	Employee	System	Published	⋮
Hodlist Card Advanced Permission	Employee	High Tech SE	Published	⋮
Order Existing Content Card	Job Order	QAAutomation	Published	⋮
TempWorks Homepage	Employee	High Tech Staffing	Published	⋮
TempWorks Website	Employee	System	Published	⋮

Delete

Select "Confirm" within the confirmation prompt to delete the selected card:

Confirm Delete

Are you sure you want to delete this card?

CANCEL
CONFIRM

Note Once a card has been deleted, it will be automatically removed from all Record Types that the card was originally set up for.

For our example, this means that Cameron Abbott will no longer have the TempWorks Homepage card on their Visifile:

The screenshot shows a user's Visifile record. At the top, there is a navigation bar with various tabs like 'VISIFILE', 'DETAILS', 'DOCUMENTS', etc. Below this, there are two main sections: 'Snapshot' and 'Note'. The 'Snapshot' section contains a table with the following data:

Field	Value
Id	4295538923
Hire Status	Eligible for Hire
Job Title	--

The 'Note' section below it shows 'No note available'.

Pages

Custom pages allow for the viewing of multiple cards on Employee, Customer, Contact, Assignment, and/or Job Order records in Beyond.

Creating Pages

Begin by navigating to Beyond > B Menu > System Settings > Content > Pages

The "Content" page will open, showing all the custom pages that have been created:

The screenshot shows the 'Pages' management interface. On the left is a sidebar with 'System Settings' and 'Pages' selected. The main area displays a table of existing pages:

Name	Record Type	Hierarchy	Publish Status
Assignment Custom Content	Assignment	System	Published
Custom Content Test	Employee	High Tech Staffing	Published
DataFrenzy Employee Page	Employee	System	Published

A '+ NEW PAGE' button is visible in the top right corner of the table area.

To create a custom page, select the "+ New Page" option at the top right to open the "New Page - Page Settings" window:

New Page - Page Settings

1 Page Settings ————— 2 Add Cards

Custom pages will be added to the right of all other pages (tabs).

* Hierarchy Select... * Assign to Record Type Select...

Page names shorter than 25 characters are recommended for optimal display.

* Name
TempWorks Test

Page name must be unique per record type

CANCEL NEXT >

Within the "New Page - Page Settings" window, you will be able to add the following:

- **Hierarchy:** The Hierarchy level the new card is set to.
- **Assign to Record Type:** The Record Type (Employee, Customer, Contact, Assignment, or Job Order) this card can be added to.
- **Name:** The name of the card that is being created.

Enter the information within the required fields.

Once the required fields have been populated, select "Next":

New Page - Page Settings

1 Page Settings ————— 2 Add Cards

Custom pages will be added to the right of all other pages (tabs).

* Hierarchy High Tech Staffing * Assign to Record Type Employee

Page names shorter than 25 characters are recommended for optimal display.

* Name
TempWorks Test

Page name must be unique per record type

CANCEL **NEXT >**

Within the "New Page - Add Cards" window, add the published custom cards you would like to appear within this page by selecting "+":

New Page - Add Cards

✓ Page Settings ————— 2 Add Cards

Add at least one *published* card to the page. A single card can be sized to fill the page.

+

CANCEL < PREVIOUS SAVE ▾

Select the cards related to the Record Type (Employee, Customer, Contact, Assignment, or Job Order) the page was created for and select "Add" once finished:

Note For cards to appear within the list, they must be published. Cards in a draft status, along with TempWorks created default cards will not appear within the list.

Add Card

🔍 Filter available cards...

- First Card
- Small card
- TempWorks Homepage
- Wiki Page for London
- Wikipedia

CANCEL **ADD (2 SELECTED)**

Before saving the page, you will be able to verify the cards that have been added and have the following two options:

- The card can be deleted from the page by selecting the trash can icon.
- The card can be chosen to fill the entire page.

New Page - Add Cards

✓ Page Settings

2 Add Cards

Add at least one *published* card to the page. A single card can be sized to fill the page.

TempWorks Homepage

🗑️ FILL PAGE

Wikipedia

🗑️ FILL PAGE

+

CANCEL < PREVIOUS SAVE ▾

Note If you would like a card to fill an entire page, only one card can be added to the page.

When selecting a card to fill a page when more than one card are selected, you will receive the following prompt:

Remove Other Cards?

Choosing *Fill Page* will remove all other cards on this page. Remove cards and continue?

CANCEL REMOVE CARDS AND CONTINUE

Once the information within the page has been verified, select one of the following options from the "Save" dropdown:

- **Save:** This will save the page as a draft.
- **Publish:** This will publish the page to be used on the Record Type selected.

New Page - Add Cards

✓ Page Settings ————— 2 Add Cards

Add at least one *published* card to the page. A single card can be sized to fill the page.

TempWorks Homepage

Wikipedia

CANCEL < PREVIOUS SAVE

Publish
Save
SAVE

Note Please keep in mind the following:

- Once a card has been published, it can only be edited or deleted.
- If saving as a draft, this can be previewed on your Visifile before publishing.

Once saved or published, the page will be shown within the "Content" page.

Utilizing Pages

Once the page has been created, it will appear automatically on all related Record Types (Employee, Customer, Contact, Assignment, or Job Order) that the page was created for:

Note For users utilizing [Security Groups with Advanced Permissions](#), access will need to be granted for the individual cards and pages within Settings > System Settings > "Record Type" within the Advanced Permissions section of that Security Group.

BY PAGE BY FIELD Selecting a parent selects children

🔍 Frenzy ✕

- Employee Access
 - Visifile Access
 - Data Frenzy Employee Access
 - Data Frenzy Setup Card Access
 - Data Frenzy SMS Access
 - Data Frenzy Employee Access
 - Data Frenzy Employee Access
 - Data Frenzy SMS Access
 - Data Frenzy SMS Access

VISIFILE DETAILS DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAY SETUP ONBOARDING PAY HISTORY CUSTOM DATA WIKI PAGE SMALL CARD PAGE **TEMPWORKS TEST**

Snapshot

Id: 4295297591 Hire Status: Eligible for Hire >


Job Title: ..

Note: No note available

Note Unlike individual cards, pages do not need to be added manually to Record Types (Employee, Customer, Contact, Assignment, or Job Order) that the page was created for.

Select the page within the top menu to see the cards within.

Editing Pages

Once a page has been saved as a draft or published, it can be edited by navigating to Beyond > B Menu > System Settings > Content > Pages, selecting  to the right of the page, and selecting "Edit":

Settings / Pages

System Settings

- Advanced Search
- Content
- Cards
- Pages**
- External Service
- Insight Widgets
- Interest Codes
- Job Titles
- On-Site Time Clock Invite Codes
- Organization
- Organizations

Name	Record Type	Hierarchy	Publish Status	
Assignment Custom Content	Assignment	System	Published	⋮
Custom Content Test	Employee	High Tech Staffing	Published	⋮
DataFrenzy Employee Page	Employee	System	Published	⋮
DataFrenzy Job Order Page	Job Order	System	Published	⋮
Employee Existing Page	Employee	QAAutomation	Published	⋮
Hotlist advanced permission page test	Employee	High Tech SE	Published	⋮
TempWorks Test	Employee	High Tech Staffing	Published	⋮
Test OAuth Page	Employee	System	Published	⋮
Wiki page	Employee	Sub System High Tech	Published	⋮

Rows per page: 20 1-9 of 9 < 1 >

Within the "Edit Page - Page Settings" window, you will be able to edit the following:

- **Name:** The name of the card that is being created.

Edit Page - Page Settings

1 Page Settings ————— 2 Add Cards

Custom pages will be added to the right of all other pages (tabs).

Hierarchy Level Assign to Record Type
High Tech Staffing Employee

Page names shorter than 25 characters are recommended for optimal display.

* Name
TempWorks Test

Page name must be unique per record type

CANCEL NEXT >

Once the changes have been made to the page, select "Next":

Edit Page - Page Settings

1 Page Settings ————— 2 Add Cards

Custom pages will be added to the right of all other pages (tabs).

Hierarchy Level Assign to Record Type
High Tech Staffing Employee

Page names shorter than 25 characters are recommended for optimal display.

* Name
TempWorks Testing

Page name must be unique per record type

CANCEL NEXT >

Within the "Edit Page - Add Cards" window, you will be able to edit the following:

- Cards can be deleted from the page by selecting the trash can icon.
- A card can be chosen to fill the entire page.

Edit Page - Add Cards

✓ Page Settings

2 Add Cards

Add at least one *published* card to the page. A single card can be sized to fill the page.

TempWorks Homepage

🗑️ ⏏️ FILL PAGE

First Card

🗑️ ⏏️ FILL PAGE

+

CANCEL < PREVIOUS SUBMIT

Note If you would like a card to fill an entire page, only one card can be added to the page.

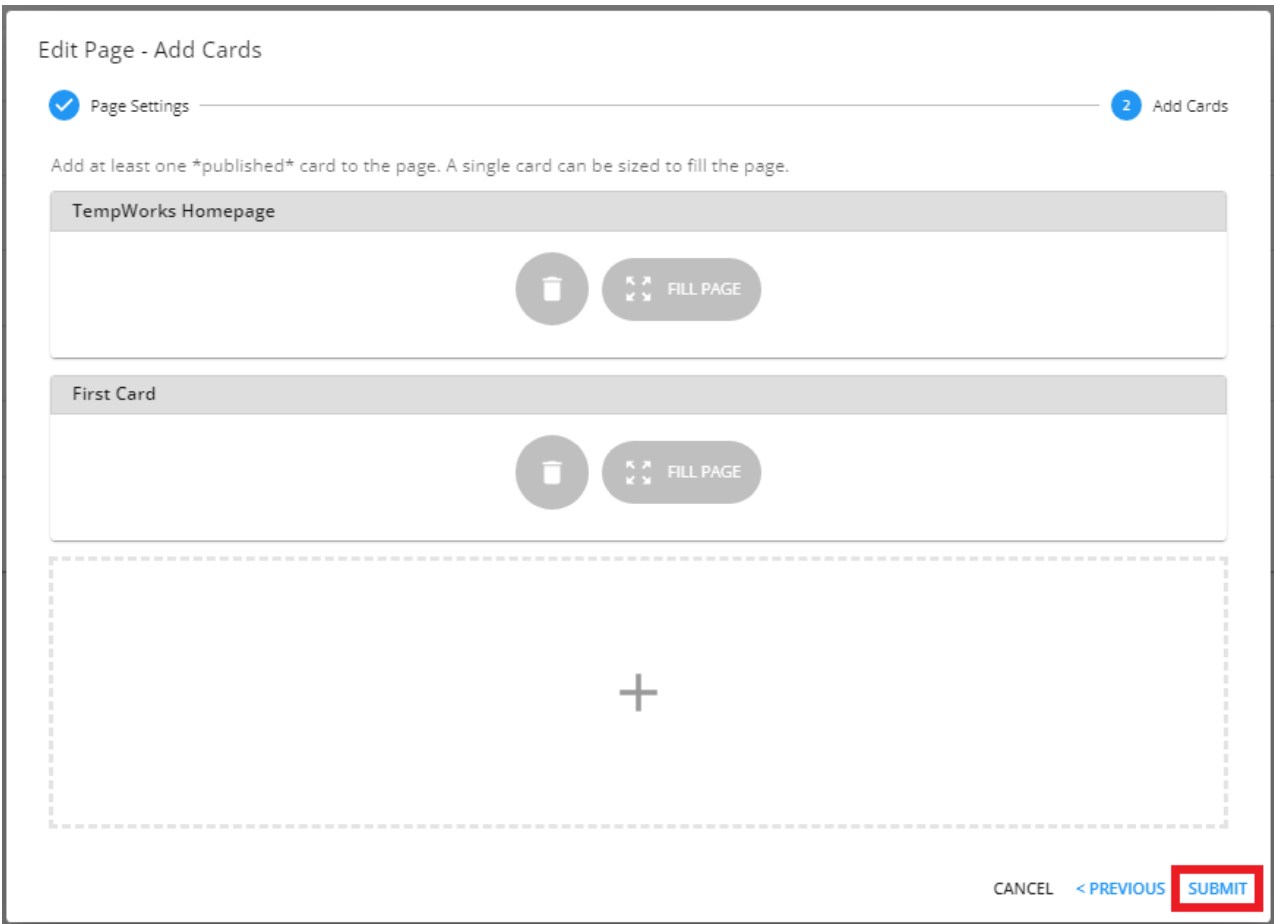
When selecting a card to fill a page when more than one card are selected, you will receive the following prompt:

Remove Other Cards?


Choosing *Fill Page* will remove all other cards on this page. Remove cards and continue?










CANCEL REMOVE CARDS AND CONTINUE

Once the changes have been made to the card, select "Submit":



Deleting Pages

Once a page has been saved as a draft or published, it can be deleted by navigating to Beyond > B Menu > System Settings > Content > Pages, selecting  to the right of the page, and selecting "Delete":

Pages					+ NEW PAGE
Name	Record Type	Hierarchy	Publish Status		
Assignment Custom Content	Assignment	System	Published		
Custom Content Test	Employee	High Tech Staffing	Published		
DataFrenzy Employee Page	Employee	System	Published		
DataFrenzy Job Order Page	Job Order	System	Published		
Employee Existing Page	Employee	QAAutomation	Published		
Hotlist advanced permission page test	Employee	High Tech SE	Published		
TempWorks Test	Employee	High Tech Staffing	Published		
Test OAuth Page	Employee	System	Published		
Wiki page	Employee	Sub System High Tech	Published		

Rows per page: 20 | 1-9 of 9 | < 1 >

Select "Confirm" within the confirmation prompt to delete the selected page:

Confirm Delete

Are you sure you want to delete this page?

CANCEL **CONFIRM**

Note Once a page has been deleted, it will be automatically removed from all Record Types that the page was originally set up for.

For our example, this means that Employees will no longer have the TempWorks Test page on their profile:

The screenshot shows a user interface with a navigation bar at the top containing links: VISIFILE, DETAILS, DOCUMENTS, MESSAGES, JOB MATCHING, ASSIGNMENTS, STORY, REFERENCES, PAY SETUP, ONBOARDING, PAY HISTORY, CUSTOM DATA, WIKI PAGE, and SMALL CARD PAGE. Below the navigation bar, there are two main sections. The first section is titled 'Snapshot' and contains a table with the following data: Id: 4295607875, Hire Status: Eligible for Hire (with a red arrow pointing right). The second section is titled 'Note' and contains the text 'No note available' with a red circular icon containing a white checkmark on the right side.

Related Articles