Beyond - Customer Master View

What is Customer Master View?

Similar to the functionality in Enterprise, Master View provides the ability to view related department record information as they relate to the master customer record, without having to navigate to the individual department records.

Setting Up Permissions

Note There are no additional security permissions required to enable the "Master View" functionality in Beyond.

Users that have access to information within the customer record will also have the ability to toggle between Account and Master Views.

Instead, there have been additional fields added to the customer record including "Balance Due" and "Sales Trailing". In order for these fields to appear for users, the "Can view additional customer financial details" permission will need to be added to applicable Security Groups:

Permissions (1 Visible, 55 Not Visible)   56 Selected

🔍 can view additional   ✕

☑ Can view additional customer financial details
   Allows user to be able to view additional financial details such as Balance Due and Sales Trailing.
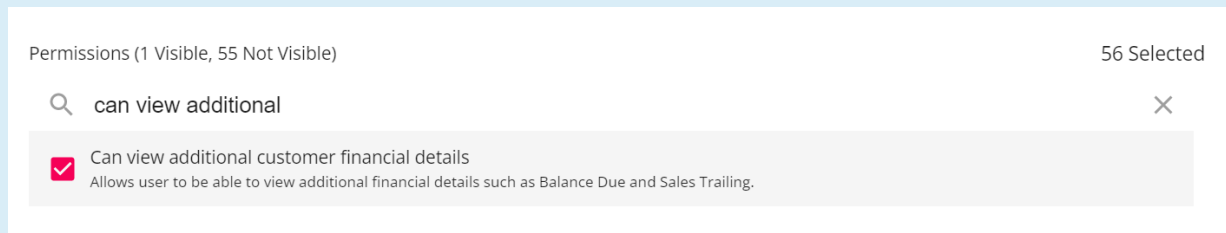
Utilizing Master View

To toggle Master View, navigate to the customer record and select the "Master View" tab within any of the following cards on the visifile:

- Snapshot
- Contacts
- Messages
- Unfilled Job Orders
- Assignments

Note Selecting the "Master View" tab within any of the above cards will automatically select "Master View" for all other applicable cards on the visifile. Toggling back to "Account View" within any of the above cards will automatically select "Account View" for all other applicable cards on the visifile.

| VISIFILE | DETAILS ⌄ | DEFAULTS ⌄ | DOCUMENTS | INVOICE HISTORY | INVOICE SETUP ⌄ | MESSAGES | CUSTOM DATA | ⇕ |

⌃ Snapshot

	ACCOUNT VIEW			MASTER VIEW 👆
Last Payment	--	YTD Sales	0.00
AR Balance	153,529.20	Credit Limit	0.00
Lifetime Sales	46,855.20	Status	Active ❯

Note When on a department record, you will see the primary record as a link that is able to be selected directly under the department name:

CUSTOMER Aardvark Industries Inc - Accounting

Aardvark Industries Inc (4294979492)
Accounting · Primary (779227) · 📍 Eagan, MN 55121

| VISIFILE | DETAILS ⌄ | DEFAULTS ⌄ | DOCUMENTS | INVOICE HISTORY | INVOICE SETUP ⌄ | MESSAGES | CUSTOM DATA |

Selecting this will navigate you to the primary customer record.

Additionally, the Invoice History can also be shown via the "Master View" within the "View" dropdown:

| VISIFILE | DETAILS ⌄ | DEFAULTS ⌄ | DOCUMENTS | INVOICE HISTORY | INVOICE SETUP ⌄ | MESSAGES | CUSTOM DATA |

Start Date	End Date	Invoice #

⌄ MORE FILTERS   RESET   SEARCH

View
Master View ▼

Search returned 18 results   ⬇

Id	Invoice Number	Invoice Date ↓	Due Date	Invoice Amount	Amount Paid	Invoice Balance	Recent Payment	Branch	Cost Center	Posted	Ma
45947	72305	7/13/2020	7/13/2020	15,505.94	0.00	15,505.94		High Tech SE		✓	72:
27948	61165	3/24/2014	3/24/2014	550.00	550.00	0.00	6/17/2014	High Tech SE		✓	61
27923	61141	3/10/2014	3/10/2014	1,048.00	1,048.00	0.00	6/16/2014	High Tech SE		✓	61
27896	61114	2/27/2014	2/27/2014	1,494.95	1,494.95	0.00	6/16/2014	High Tech SE		✓	61
27854	61073	2/18/2014	2/18/2014	880.00	880.00	0.00	6/16/2014	High Tech SE		✓	61(
27674	3	1/3/2014	1/3/2014	1,048.00	1,048.00	0.00	2/12/2014	High Tech SE		✓	3

Finally, the "Master View" can be selected within the Quick View options when right-clicking a customer record from search results:

Related Articles