

# Beyond - Customer Master View

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## What is Customer Master View?

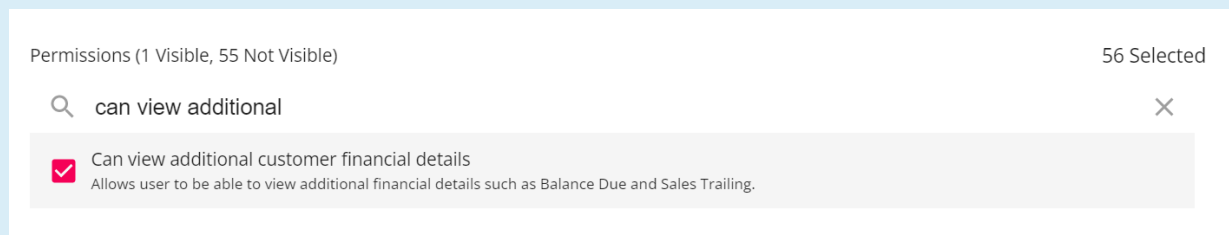
Similar to the functionality in [Enterprise](#), Master View provides the ability to view related department record information as they relate to the master customer record, without having to navigate to the individual department records.

## 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 <span>⌵</span>			
^ 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

424 results

Id	Invoice Number	Invoice Date	Due Date	Invoice Amount	Amount Paid	Invoice Balance	Recent Payment	Branch	Cost Center	Posted
35699	1573518	9/12/2025	10/12/2025	6,860.03	0.00	6,860.03		Minneapolis		
35686	1573505	9/12/2025	10/12/2025	19,342.42	0.00	19,342.42		Minneapolis		
35672	1573504	9/12/2025	10/12/2025	2,219.94	0.00	2,219.94		Minneapolis		
35624	1573400-1	8/25/2025	9/24/2025	-292.65	-292.65	0.00	8/25/2025	Minneapolis		
35623	1573428-1	8/25/2025	9/24/2025	-999.00	-999.00	0.00	8/25/2025	Minneapolis		
35588	1573431	8/8/2025	9/7/2025	574.20	574.20	0.00	8/25/2025	Minneapolis		
35583	1573428	7/31/2025	8/30/2025	999.00	1,024.80	-25.80	8/25/2025	Minneapolis		
35549	1573400	7/17/2025	8/16/2025	-1,881.97	292.65	-2,174.62	8/25/2025	Minneapolis		
35527	1573383	7/11/2025	8/10/2025	14,256.30	14,256.30	0.00	7/11/2025	Minneapolis		

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

Customer

Aardvark Industries Inc - Primary

779227

Eagan, MN 55121

ACTIVE

ONBOARDING

(651) 123-4567

Car Phone

(507) 202-2990

Cell Phone

imapdummyaccou...

Email

(651) 830-1830

Office Phone

View as

Master View

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