Beyond - Charms Overview

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Overview

In Beyond, charms are provided for every main record type (Employee, Customer, Contact, Job Order, Assignment, Prospect) that provides specific information and functionality directly related to that record type.


Note You also have the ability, at any time, to rearrange the charms by simply selecting the charm and moving it within the list.

Your arrangement of the charms will be persistent upon logging in and out of Beyond. In the event you would like for the charms to go back to the default arrangement, navigate to B Menu > User Settings > General > User Preferences > Clear Preferences:
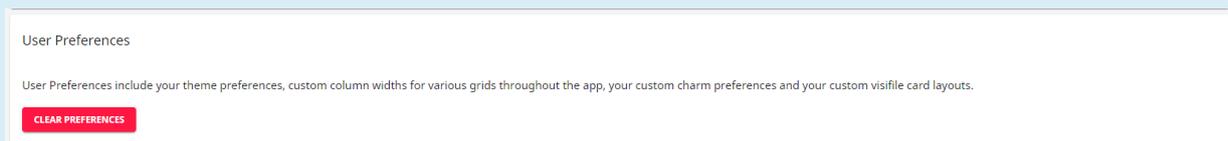

Just note that by selecting this option, you will also lose your customizations to theme, column widths/grids, and visifile layouts.

Note If the charm does not automatically appear within the header of the intended record type, select the "More" option to the right to see all of the charms available to you related to that record type:
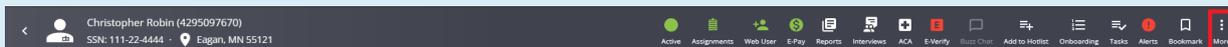

If there is a charm that exists but you do not have access to, you may need a specific permission (these are referenced, as needed, within this article). If this is the case, please contact your Bridge Administrator for assistance.

Note In the event you make your Beyond window smaller, you will notice the charms no longer appear within the header of the record:
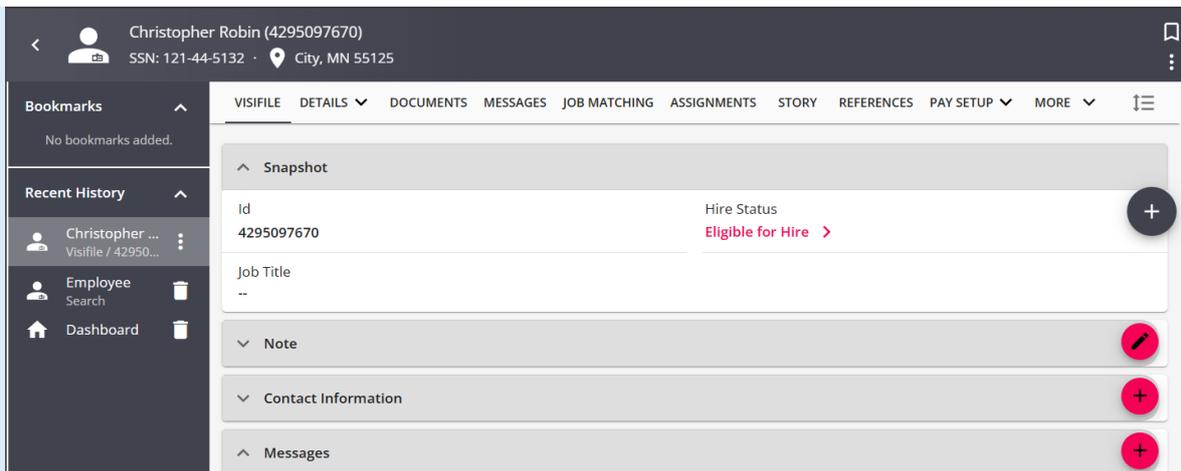
To access the charms once again, select the "+" to the right of the window, which will display a list of the selected charms on the record:
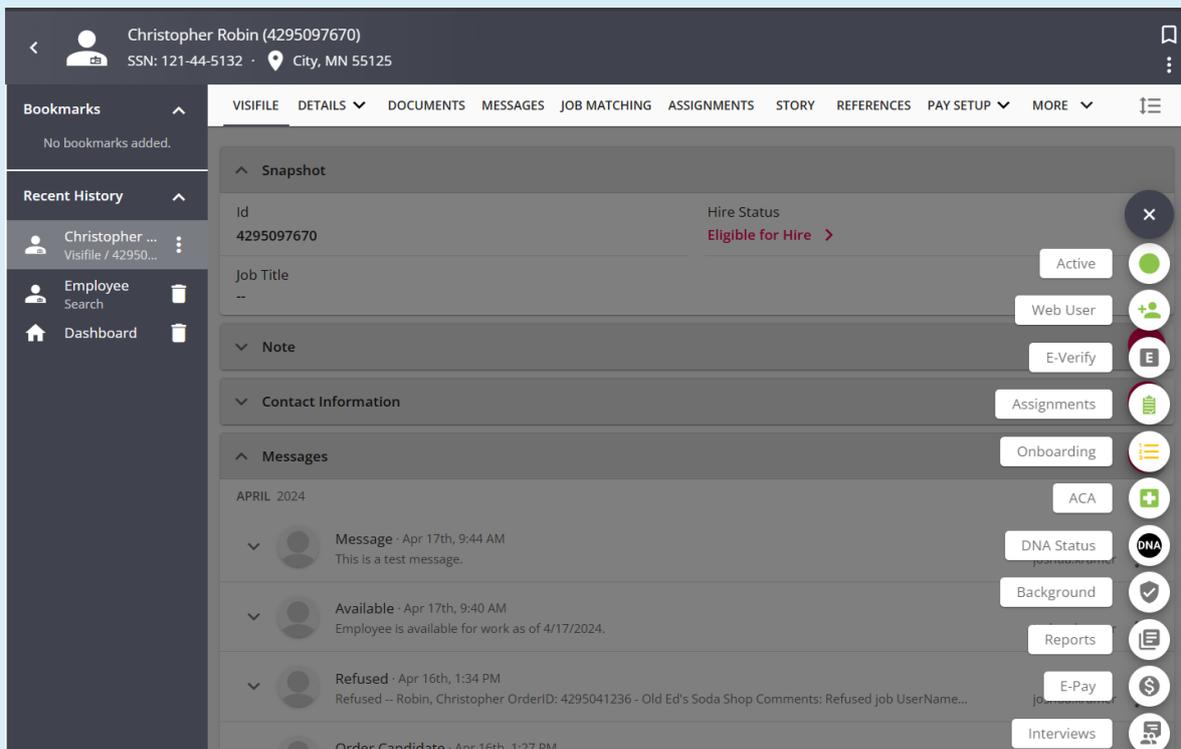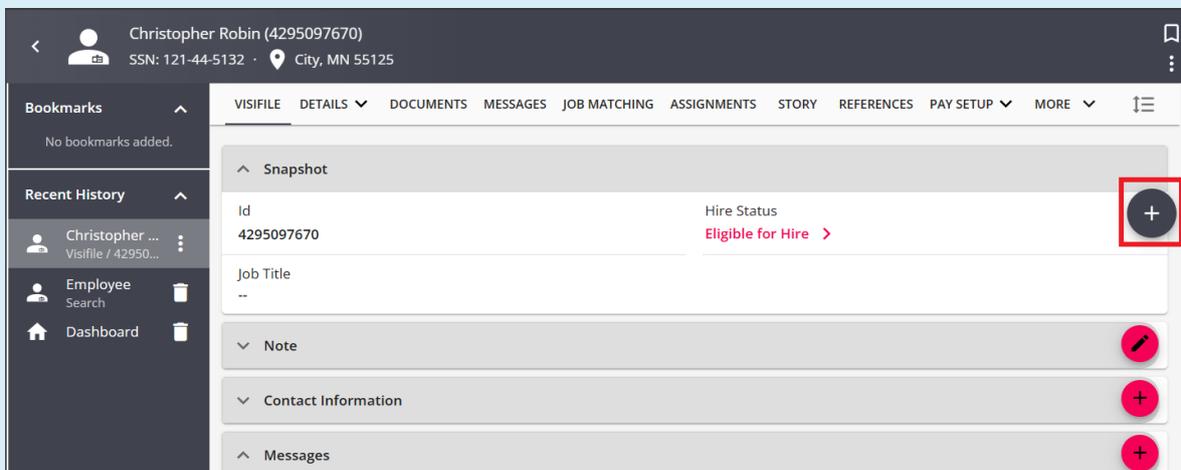
Employee Charms
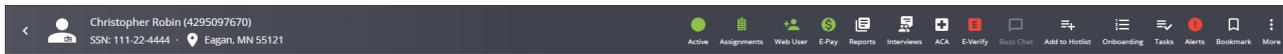

The following charms exist for the employee record:

ACA

- Shows ACA information related to the employee record depending on the color of the charm:
    - If **black**, ACA has not been setup on the employee record.
    - If **green**, the ACA Status is set up to Full-Time, Part-Time, Seasonal, or Variable.
    - If **red**, there are potential connection issues where TempWorks Support may need to be contacted.

> ***Note*** For more information, please see the article titled ACA Overview.

Active (Status)

- Shows the status of the employee record
    - If **green**, the employee is "Active"
    - If **black**, the employee is "Inactive"
- When selecting the charm, you will have the ability to either activate an inactive employee, or deactivate an active employee record (as long as the employee is not on an assignment):

> ***Note*** For more information, please see the article titled Beyond - How to Deactivate and Reactivate Employee Records.

Alerts

- Shows the user alerts that will need to be resolved that are related to the employee record:

> ***Note*** This charm will only appear in the event the employee has at least one alert that needs to be resolved.

Assignments

- Shows the assignment information related to the employee record depending on the color of the charm:
    - If **black**, the employee is not on any active assignments.

- If **green**, the employee has at least one active assignment.
- If **yellow**, the employee's assignment(s) have a start date in the future compared to today's date.
- If **red**, there are potential connection issues where TempWorks Support may need to be contacted.

> ***Note*** For more information, please see the article titled Beyond - How to Create an Assignment Record.

Background Checks

- Allows the user to either run a new or view existing background checks directly related to the employee record:
    - If **red**, there are potential connection issues where TempWorks Support may need to be contacted.

> ***Note*** This charm will only appear for users who have a background check provider setup within Beyond.

> ***Note*** For more information, please see the article titled Beyond Background Check Integrations.

Buzz Chat

- Allows the user to chat with the employee via the Buzz application
- Shows status depending on the color of the charm:
    - If **black**, a chat is able to be started.
    - If **grey**, the Buzz application has not been setup.
    - If **red**, there are potential connection issues where TempWorks Support may need to be contacted.

Create Resume

- Allows the user to create a resume directly from the employee record:

> ***Note*** For more information, please see the article titled Beyond - Creating an Employee Resume.

DNA (Do Not Assign) Status

- The state of the DNA State charm depends on the pre-existing "Do Not Assign" field and its status via Employee > Details > "Do Not Assign".
- Shows information related to the employees DNA Status depending on the color of the charm:
    - If **black**, one of the following will be true:

- The employee has **not** been marked as "Do Not Assign".
- The customer has **not** been marked as "Do Not Assign".
  - If red, one of the following will be true:
    - The employee was marked as "Do Not Assign" by a customer.
    - The employee marked a customer as "Do Not Assign".
    - Both the employee and customer marked each other as "Do Not Assign".

> ***Note*** If an employee has a DNA Status. you can select the "See all records" option within the charm to be navigated directly to the associated DNA record(s):
>
>
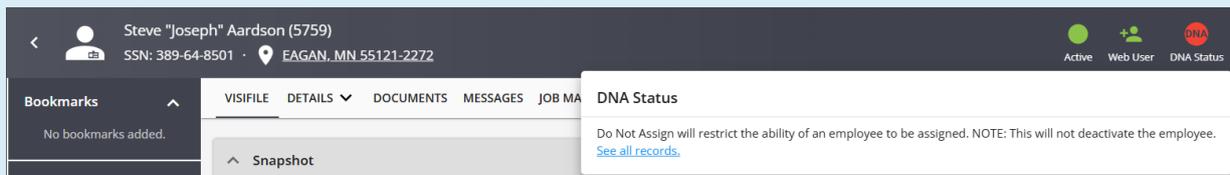
E-Pay (Direct Deposit)

- Shows information related to the employees e-pay setup depending on the color of the charm:
  - If **black**, the employee does not have electronic pay set up.
  - If **green**, the employee has their electronic pay set up.
  - If red, there are potential connection issues where TempWorks Support may need to be contacted.

> ***Note*** For more information, please see the article titled Beyond - Employee Pay Setup.

E-Verify

- Shows E-Verify information related to the employee record depending on the color of the charm:
  - If **black**, the employee has not been E-Verified.
  - If **green**, the E-Verify case has been completed and the employee is verified to work in the US.
  - If yellow, the E-Verify case is pending or incomplete.
    - Not Started - Employee has registered yet completed no pages in the current step.
    - In Progress - Employee has completed at least one page in the current step.
    - Submitted - Employee has submitted the current step for the Service Rep to review.
    - Rejected
  - If red, this is due to one of the following causes:
    - The E-Verify case was closed without Employee Authorization.
    - The E-Verify password is expired and needs to be reset.
    - There are potential connection issues where TempWorks Support may need to be contacted.
- Allows the user to create or view existing E-Verify cases for the employee.

Interviews

- Allows the user to either conduct or view existing interviews related to the employee record:

Merge Record

- Allows the user to merge the employee record with another:

Onboarding

- Shows onboarding steps related to the employee record depending on the color of the charm
  - If **black**, the employee does not have an assignment HRCenter workflow.
  - If grey, the employee does not have a Web User account setup and is not linked to an HRCenter instance.
  - If **green**, the latest assigned HRCenter workflow (per "Date Assigned") has the status "Completed".
  - If **yellow**, the latest assigned HRCenter workflow (per "Date Assigned") is in one of the following statuses:
    - Not Started - Employee has registered yet completed no pages in the current step.
    - In Progress - Employee has completed at least one page in the current step.
    - Submitted - Employee has submitted the current step for the Service Rep to review.
    - Rejected
  - If **red**, there are potential connection issues where TempWorks Support may need to be contacted.
- Once selected, the user has the ability to assign additional HRCenter workflows/pages, or view assignment workflows:

Reports

- Shows the favorited reports that directly relate to the employee record
- Can also select to see all of the reports the user has access to that are directly related to the employee record

Note For more information, please see the article titled Beyond - Profile Reports.

Sense

- Allows the user to sync employee record information with Sense
- Status of Sense can be seen depending on the color of the charm:
    - If **black**, record information can be synced with Sense.
    - If **red**, there are potential connection issues where TempWorks Support may need to be contacted.

Note This charm will only appear if the user has the Sense texting service enabled.

Note For more information, please see the article titled Sense Overview.

Tasks

- Shows the tasks related to the employee record while also allowing the user to create a new task:

Note For more information, please see the article titled Beyond - Tasks.

Text-Em-All

- Allows the user to text the individual employee record
- Status of Text-Em-All can be seen depending on the color of the charm:
    - If **black**, the user is able to send a text to the employee.
    - If **red**, there are potential connection issues where TempWorks Support may need to be contacted.

Note This charm will only appear if the user has the Text-Em-All integration enabled while also having the appropriate texting permission.

Web User

- Shows the status of the Web User depending on the color of the charm:
    - If **black**, the employee does not have a Web User account setup.
    - If **green**, the employee has a Web User account setup.
    - If **red**, there are potential connection issues where TempWorks Support may need to be contacted.
    - If **yellow**, the web user account is locked. This is only able to be seen if the user has the "Can unlock web user account" permission.
- Depending on the color of the charm, once selected, allows the user to either invite, create, or manage the Web User account:

Note For more information, please see the article titled Beyond - Managing Web User Account.

WOTC

- The state of the WOTC charm depends on the pre-existing "WOTC Eligibility Status" field and its status via Employee > Details > Hiring > "WOTC Eligibility Status".
- Shows the WOTC eligibility status of the employee depending on the color of the charm:
    - If **black**, the employee does not have a WOTC eligibility status selected.
    - If **green**, the employee has one of the following WOTC statuses:
        - "Eligible"
        - "Eligible - Maximized Credit"
        - "Eligible - State Certified"
    - If **red**, the employee is not WOTC eligible.

Note The Employees WOTC eligibility status is unable to be changed via the charm.

Customer Charms

The following charms exist for the customer record:

Active (Status)

- Shows the status of the customer record
    - If **green**, the customer is "Active"
    - If **black**, the customer is "Inactive"
- When selecting the charm, you will have the ability to change the customer status:

Note For more information, please see the article titled Beyond - Customer Statuses.

DNA (Do Not Assign) Status

- The state of the DNA State charm depends on the pre-existing "Do Not Assign" field and its status via Customer > Details > "Do Not Assign".
- Shows information related to the customers DNA Status depending on the color of the charm:
    - If **black**, one of the following will be true:
        - The employee has **not** been marked as "Do Not Assign".
        - The customer has **not** been marked as "Do Not Assign".
    - If **red**, one of the following will be true:
        - The employee was marked as "Do Not Assign" by a customer.
        - The employee marked a customer as "Do Not Assign".
        - Both the employee and customer marked each other as "Do Not Assign".

Note If a customer has a DNA Status. you can select the "See all records" option within the charm to be navigated directly to the associated DNA record(s):
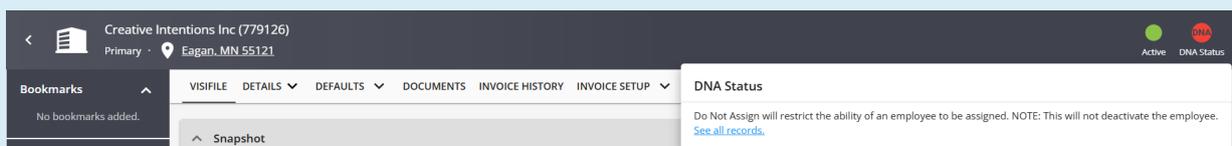
Onboarding

- Shows onboarding steps related to the customer record.

Note This charm will only show for users that have the "Onboard Can Assign" permission.

Note For more information, please see the article titled Beyond - Onboarding.

Reports

- Shows the favorited reports that directly relate to the customer record
- Can also select to see all of the reports the user has access to that are directly related to the customer record

Note For more information, please see the article titled Beyond - Profile Reports.

Sense

- Allows the user to sync customer record information with Sense
- Status of Sense can be seen depending on the color of the charm:
    - If **black**, record information can be synced with Sense.
    - If **red**, there are potential connection issues where TempWorks Support may need to be contacted.

Note This charm will only appear if the user has the Sense texting service enabled.

Note For more information, please see the article titled Sense Overview.

Tasks

- Shows the tasks related to the customer record while also allowing the user to create a new task:

Note For more information, please see the article titled Beyond - Tasks.

Contact Charms

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Active · Reports · Web User · Tasks · Sync To Sense · Add to Hotlist · Bookmark · More

The following charms exist for the contact record:

Active (Status)

- Shows the status of the contact record
    - If **green**, the contact is "Active"

- - If **black**, the contact is "Inactive"
- When selecting the charm, you will have the ability to change the contact status:

Note For more information, please see the article titled Beyond - Deactivating Contact Records.

Reports

- Shows the favorited reports that directly relate to the contact record
- Can also select to see all of the reports the user has access to that are directly related to the contact record

Note For more information, please see the article titled Beyond - Profile Reports.

Sense

- Allows the user to sync contact record information with Sense
- Status of Sense can be seen depending on the color of the charm:
    - If **black**, record information can be synced with Sense.
    - If **red**, there are potential connection issues where TempWorks Support may need to be contacted.

Note This charm will only appear if the user has the Sense texting service enabled.

Note For more information, please see the article titled Sense Overview.

Tasks

- Shows the tasks related to the contact record while also allowing the user to create a new task:

Note For more information, please see the article titled Beyond - Tasks.

Text-Em-All

- Allows the user to text the individual contact record
- Status of Text-Em-All can be seen depending on the color of the charm:
    - If **black**, the user is able to send a text to the contact.
    - If **red**, there are potential connection issues where TempWorks Support may need to be contacted.

Web User

- Shows the status of the Web User depending on the color of the charm:
    - If **black**, the contact does not have a Web User account setup.
    - If **green**, the contact has a Web User account setup.
    - If **yellow**, the web user account is locked. This is only able to be seen if the user has the "Can unlock web user account" permission.
- Depending on the color of the charm, once selected, allows the user to either invite, create, or manage the Web User account:

Job Order Charms

The following charms exist for the Job Order record:

Active (Status)

- Shows the status of the job order record
    - If **green**, the job order is "Active"
    - If **black**, the job order is "Inactive"
- When selecting the charm, you will have the ability to change the job order status:

Copy Order

- Selecting this allows the user to copy the job order record

Reports

- Shows the favorited reports that directly relate to the job order record
- Can also select to see all of the reports the user has access to that are directly related to the job order record

Sense

- Allows the user to sync job order record information with Sense
- Status of Sense can be seen depending on the color of the charm:
    - If **black**, record information can be synced with Sense.
    - If **red**, there are potential connection issues where TempWorks Support may need to be contacted.

Note This charm will only appear if the user has the Sense texting service enabled.

Tasks

- Shows the tasks related to the job order record while also allowing the user to create a new task:

Unfilled

- If **yellow**, shows that the job order is currently "Unfilled".
- Once the job order has been filled, this charm will no longer be visible.

Assignment Charms

The following charms exist for the assignment record:

Active (Status)

- Shows the status of the assignment record
    - If **green**, the assignment is "Active"
    - If **black**, the assignment is "Inactive"
- When selecting the charm, you will have the ability to change the assignment status:

> ***Note*** For more information, please see the article titled Beyond - How to End an Assignment.

DNA (Do Not Assign) Status

- The state of the DNA State charm depends on the pre-existing "Do Not Assign" fields and their status via Assignment > Details > "Customer DNA" and/or "Employee DNA".
- Shows information related to the assignments DNA Status depending on the color of the charm:
    - If **black**, one of the following will be true:
        - The employee has **not** been marked as "Do Not Assign".
        - The customer has **not** been marked as "Do Not Assign".
    - If **red**, one of the following will be true:
        - The employee was marked as "Do Not Assign" by a customer.
        - The employee marked a customer as "Do Not Assign".
        - Both the employee and customer marked each other as "Do Not Assign".

Onboarding

- Shows onboarding steps related to the assignment record depending on the color of the charm
    - If **black**, the assignment is "Inactive".
    - If **grey**, the employee on assignment does not have a Web User account setup and is not linked to an HRCenter instance.

> ***Note*** This charm will only show for users that have the "Onboard Can Assign" permission.

> ***Note*** For more information, please see the article titled Beyond - Onboarding.

Reports

- Shows the favorited reports that directly relate to the assignment record
- Can also select to see all of the reports the user has access to that are directly related to the assignment record

Note For more information, please see the article titled Beyond - Profile Reports.

Send Email

- Allows the user to send an email directly to the employee on the assignment record
    - If **black**, the employee has an email on file.
    - If grey, the employee does not have an email on file.
- As long as the employee has an email address on file, once the charm is selected, the user will have the ability to choose how the email will be created:

Note For more information, please see the article titled Beyond - How to Email in Beyond.

Sense

- Allows the user to sync assignment record information with Sense
- Status of Sense can be seen depending on the color of the charm:
    - If **black**, record information can be synced with Sense.
    - If **red**, there are potential connection issues where TempWorks Support may need to be contacted.

Note This charm will only appear if the user has the Sense texting service enabled.

Note For more information, please see the article titled Sense Overview.

Tasks

- Shows the tasks related to the assignment record while also allowing the user to create a new task:

Note For more information, please see the article titled Beyond - Tasks.

Prospect Charms

The following charms exist for the prospect record:

Customer (Convert)

- Depending on the status of the prospect record, this charm will either allow you to convert the prospect to a customer record, or simply navigate you directly to the customer record.

> ***Note*** For more information, please see the article titled Beyond - Converting a Prospect to a Customer Record.

Tasks

- Shows the tasks related to the prospect record while also allowing the user to create a new task:

> ***Note*** For more information, please see the article titled Beyond - Tasks.

Related Articles