

Beyond - How to Create and Manage Hot Lists

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What are Hotlists?

Hotlists allow you an opportunity to place employees, customers, and/or contacts within given static lists in order to easily access and locate them, without having to run a search.

Hotlists may commonly be used to group employees who have been pre-qualified for a specific customer or skill set, or to track your key or target customers. The hot list section of Beyond can be accessed directly from via B Menu > Hotlists.

Note Employee and Customer hotlists created in Enterprise will also appear in Beyond, and vice versa.

Contact hotlists are new functionality that has only been added to Beyond.

This article covers the following:

1. [Setting Up Permissions](#)
2. [How to Create a Hotlist](#)
3. [Add Employees, Customers, or Contacts to an Existing Hotlist](#)
4. [Searching for Hotlists](#)
5. [Editing or Deleting a Hotlist](#)
6. [Functionality Available Within a Hotlist](#)

Setting Up Permissions

The ability to create hotlists within Beyond is a standard feature and therefore does not require additional standard Security Group permissions.

Note Users have the ability to create "Private" hotlists which make the hotlist viewable by only the user who created that hotlist.

If you or other users should have access to view "Private" hotlists, the "Can Bypass Hotlist Private Flag" permission will need to be added to your intended Security Group:

hotlist



Can Bypass Hotlist Private Flag

Allows a user to see another user's private hotlists.

Note If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Hotlists" pages and forms to the Security Groups that require the functionality:

BY PAGE	BY FIELD	Selecting a parent selects children <input checked="" type="checkbox"/>	
hotlist			
Hotlists		<input checked="" type="checkbox"/>	Access
Details	Page	<input checked="" type="checkbox"/>	Access
Update Hotlist Contact Member	Form	<input checked="" type="checkbox"/>	Access
Note	Field	<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write
Update Hotlist Customer Member	Form	<input checked="" type="checkbox"/>	Access
Note	Field	<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write
Update Hotlist Employee Member	Form	<input checked="" type="checkbox"/>	Access
Hotlist Step	Field	<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write
Hotlist Note	Field	<input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/> Write

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

How to Create a Hot List

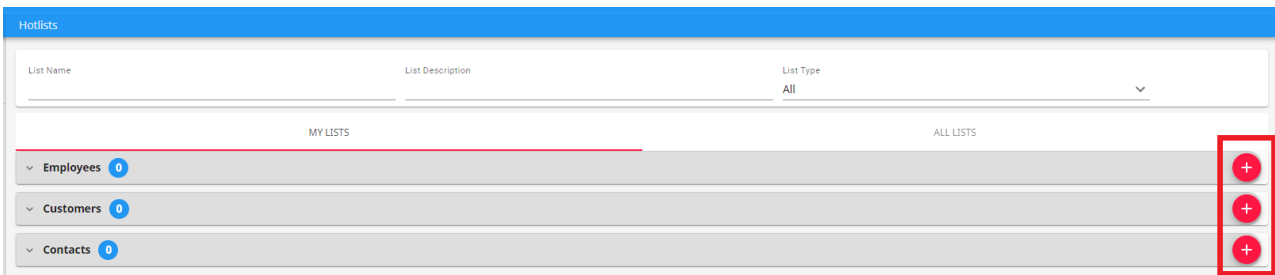
Hot lists can be created from three different areas:

1. Within B Menu > Hotlists
2. Via an Employee/Customer/Contact search
3. Via the "Add to Hotlist" charm on the Employee/Customer/Contact record

Create a Hotlist from B Menu > Hotlists

Hotlists are separated by record type and can be created for employees, customers, or contacts.

To create a hotlist, navigate to B Menu > Hotlists > "+" icon to the right of the record type you would like to create the hotlist for:



This will open the "New Hotlist" window where you will enter the following:

1. Enter the name of the hotlist.
2. Enter the description of the hotlist.
3. Mark the hotlist as either "Private" (default) or "Public".

New Hotlist for Employees

Fill out the fields below in order to create a new list.

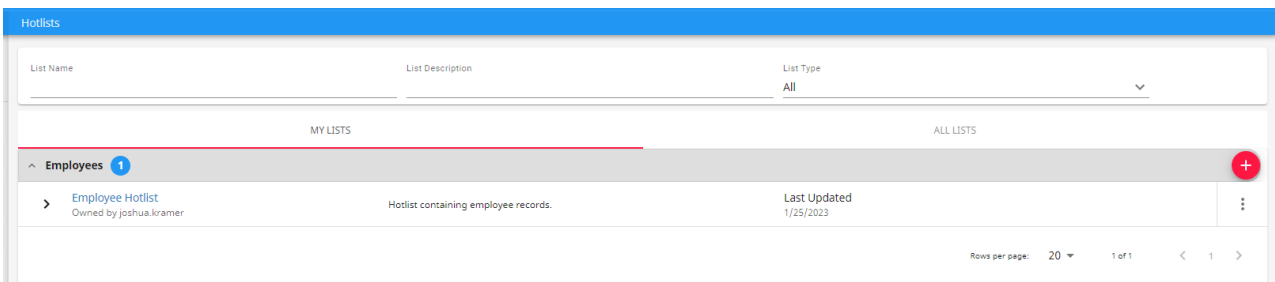
* List name
Employee Hotlist

* Description
Hotlist containing employee records.

Private

SAVE AS DRAFT **CANCEL** **SUBMIT**

Once the information has been entered, select "Submit" for the hotlist to be created and for it to appear within the "My Lists" tab:



Create a Hotlist via an Employee/Customer/Contact Search

If you have completed an employee, customer, or contact search, and wish to add all, or some of those results to a new hotlist; you can create a hotlist directly from the search result.

To do so, select the "# Selected Employees" dropdown and select "Add to Hotlist" within the search results:

EMPLOYEE Search / Employees

BASIC		ADVANCED	
Last Name Abbott	First Name C	Employee Id	Government Id
Assigned Either	Status Active	Branch All	Service Representative All

RESET SEARCH

Search returned 92 results

3 selected employees Clear Selection

Name	Branch	Is Active	Is Assigned	Last Message	Zip Code	Resume on file	Phone
on	High Tech NE	☑	⊗	ZipWhip	11223	⊗	65
on	High Tech NE	☑	⊗			⊗	
on	High Tech NE	☑	⊗			⊗	
on	High Tech NE	☑	⊗			⊗	
on	High Tech NE	☑	⊗			⊗	
on	High Tech NE	☑	⊗			⊗	
on	High Tech NE	☑	⊗			⊗	
on	High Tech NE	☑	⊗			⊗	
on	High Tech NE	☑	⊗			⊗	
on	High Tech NE	☑	⊗			⊗	

3 selected employees

- Email
- Log Message for 3 Recipients
- Make Candidates
- Make Job Offers
- Assign
- Add to Hotlist**
- Merge Record
- Select up to 2 records to merge
- Text 3 Employees

Onboarding

- Assign a New Workflow...
- Assign Pages Ad Hoc...

This will open the "Add to Hotlist" window where you will enter the following:

1. Enter the name of the hotlist.
2. Enter the description of the hotlist.
3. Mark the hotlist as either "Private" or "Public" (default).

Add to Hotlist

Select an existing hotlist from the dropdown or create a new one.

Existing Hotlists

OR

* New List Name
Abbott Employees

* New Description
Employees with the last name of Abbott

Public

Select Position on Hotlist

Add to top of list

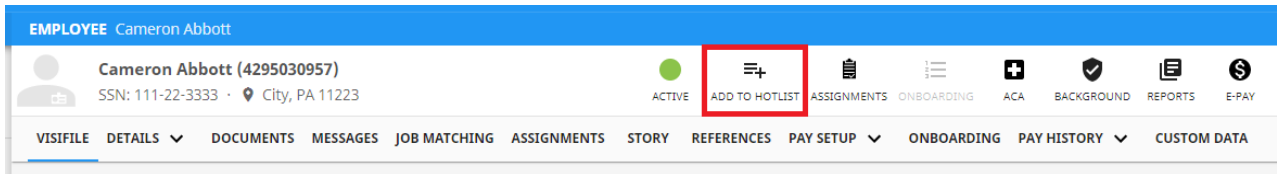
Add to bottom of list

SAVE AS DRAFT CANCEL SUBMIT

Once the information has been entered, select "Submit" for the hotlist to be created and for it to appear within the "My Lists" tab.

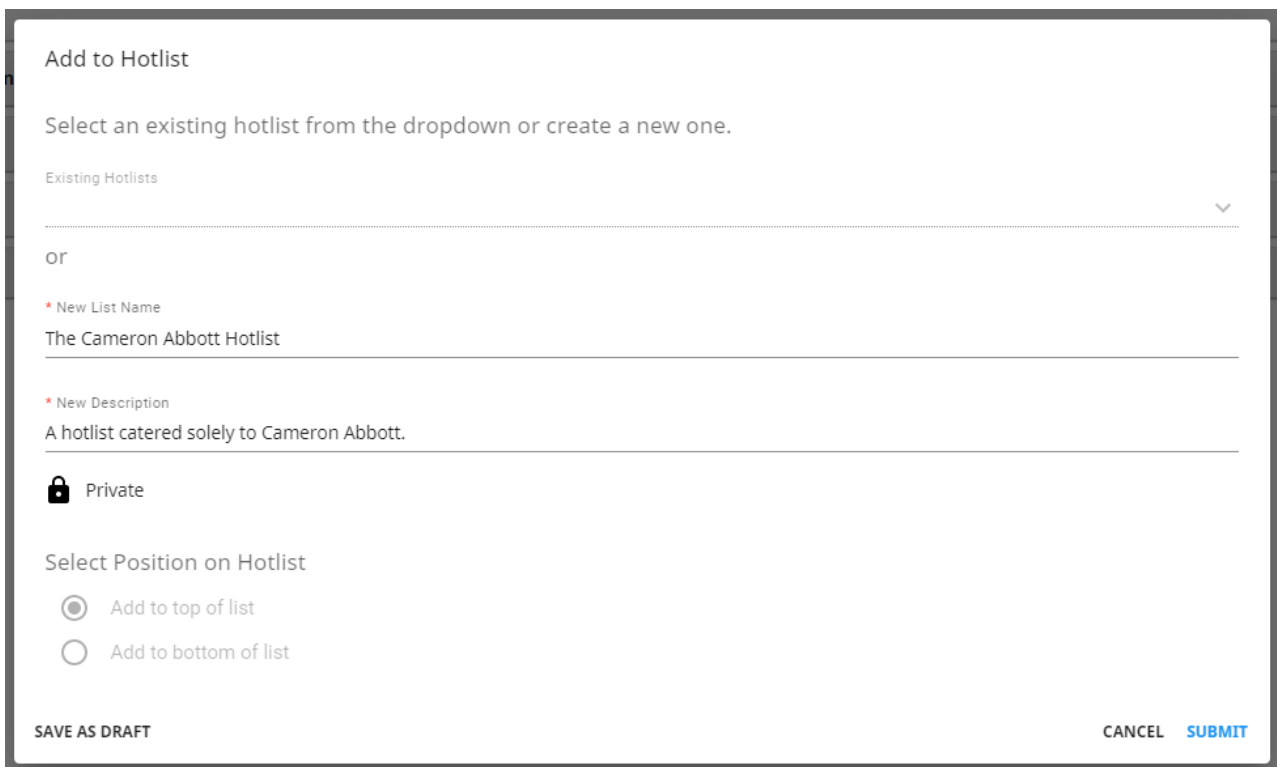
Create a Hotlist via the "Add to Hotlist" Charm on the Employee/Customer/Contact Record

While on an employee, customer, or contact record, you can create a hotlist for the employee by selecting the "Add to Hotlist" charm:



This will open the "Add to Hotlist" window where you will enter the following:

1. Enter the name of the hotlist.
2. Enter the description of the hotlist.
3. Mark the hotlist as either "Private" (default) or "Public".

A screenshot of the "Add to Hotlist" form. The form is titled "Add to Hotlist" and contains the following fields and options:

- A dropdown menu for "Existing Hotlists" with a downward arrow.
- The word "or" centered on the screen.
- A text input field for "New List Name" with the value "The Cameron Abbott Hotlist".
- A text input field for "New Description" with the value "A hotlist catered solely to Cameron Abbott."
- A radio button for "Private" (selected) and a radio button for "Public".
- A section titled "Select Position on Hotlist" with two radio buttons: "Add to top of list" (selected) and "Add to bottom of list".
- Buttons for "SAVE AS DRAFT", "CANCEL", and "SUBMIT" at the bottom.

Once the information has been entered, select "Submit" for the hotlist to be created and for it to appear within the "My Lists" tab.

Add Employees, Customers, or Contacts to an Existing Hotlist

Once you have created the hotlist you can add employees, customers, or contacts to a hotlist at any time from either a search result, or from within the specific record via the "Add to Hotlist" charm.

Adding from Search Results:

The screenshot shows the 'EMPLOYEE Search / Employees' interface. It features search filters for 'Last Name' (Abbott), 'First Name' (C), 'Employee Id', and 'Government Id'. There are also dropdowns for 'Assigned' (Either), 'Status' (Active), 'Branch' (All), and 'Service Representative' (All). A 'RESET' and 'SEARCH' button are present. Below the filters, it states 'Search returned 92 results' and shows '3 selected employees' in a red box. A dropdown menu is open, listing actions like 'Email', 'Log Message for 3 Recipients', 'Make Candidates', 'Make Job Offers', 'Assign', 'Add to Hotlist' (highlighted in a red box), 'Merge Record', 'Text 3 Employees', and 'Onboarding'. The background shows a table of search results with columns for name, branch, status, and other details.

Adding via the "Add to Hotlist" Charm:

The screenshot shows the 'EMPLOYEE Cameron Abbott' profile page. The header includes the employee's name 'Cameron Abbott (4295030957)', SSN, and location. Below the header is a navigation bar with various icons: 'ACTIVE', 'ADD TO HOTLIST' (highlighted in a red box), 'ASSIGNMENTS', 'ONBOARDING', 'ACA', 'BACKGROUND', 'REPORTS', and 'E-PAY'. A secondary navigation bar at the bottom lists 'VISIFILE', 'DETAILS', 'DOCUMENTS', 'MESSAGES', 'JOB MATCHING', 'ASSIGNMENTS', 'STORY', 'REFERENCES', 'PAY SETUP', 'ONBOARDING', 'PAY HISTORY', and 'CUSTOM DATA'.

Both options will open the "Add to Hotlist" window where you will select the intended hotlist from the "Existing Hotlist" dropdown:

Add to Hotlist

Select an existing hotlist from the dropdown or create a new one.


* Existing Hotlists

Employee Hotlist x v

OR

New List Name

New Description

 Private

Select Position on Hotlist

Add to top of list

Add to bottom of list

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Note The hotlists that appear within this dropdown include:

- Your hotlists that pertain to the specific record type.
- Other users' hotlists that have been made "Public" that pertain to the specific record type.
- All "Private" hotlists as long as you have the security permission to view other users' "Private" hotlists.

Once the hotlist has been selected, you will have the option to choose where the records will display within the hotlist via the "Select Position on Hotlist" section:

Add to Hotlist

Select an existing hotlist from the dropdown or create a new one.

* Existing Hotlists

Employee Hotlist x v

OR

New List Name

New Description

Private

Select Position on Hotlist

Add to top of list

Add to bottom of list

SAVE AS DRAFT CANCEL **SUBMIT**

Once the intended hotlist has been selected from the dropdown, and the position of the records has been chosen, select "Submit" to add the records to the hotlist.

Note Records that are visible within any given hotlist are dependant on what the user can view within their hierarchy.

Searching for Hotlists

To locate the hotlist you wish to utilize, navigate to B Menu > Hotlists.

You can then search for your desired hot list by using the available search and filter options:

- List Name or
- List Description
- List Type (All, Static List, Saved Search)

Hotlists

List Name	List Description	List Type
		All

MY LISTS ALL LISTS

- Employees 118 +
- Customers 63 +
- Contacts 28 +

Note By default, the List Type will be set to "All" (including both hotlists and saved searches):

- The ">" symbol signifies a hotlist.
- The magnifying glass symbol signifies a saved search.

You can also filter between viewing your lists or viewing all lists. Viewing all lists includes the following:

- All hotlists that have been made public.
- Hotlists that were made private by the original user, but you have the associated permission to view them.


The screenshot shows the 'Hotlists' interface. At the top, there is a search bar with 'List Name' and 'List Description' fields, and a 'List Type' dropdown menu set to 'All'. Below this, there are two tabs: 'MY LISTS' and 'ALL LISTS'. Under 'MY LISTS', there are three hotlists: 'Employees' with 118 records, 'Customers' with 63 records, and 'Contacts' with 28 records. Each hotlist has a red '+' icon to its right.

Editing or Deleting a Hotlist

Hotlists can be edited or deleted by navigating to B Menu > Hotlists.

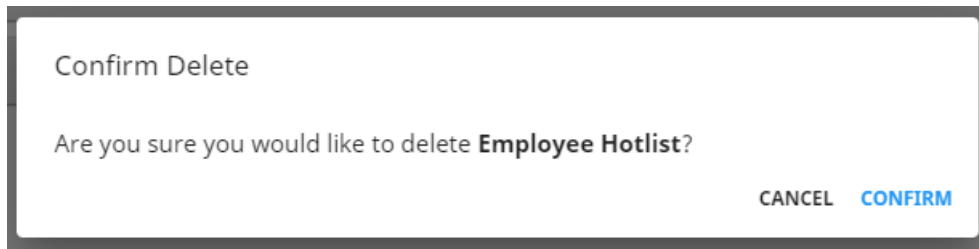
To **edit** a hotlist, select the hotlist from the record type dropdowns and select the pencil icon to the right of the hotlist details:

The screenshot shows the 'Hotlists' interface with the 'Employee Hotlist' selected. The 'Employee Hotlist' is highlighted in a red box. The details for this hotlist are shown below, including the name 'Employee Hotlist', the owner 'Owned by joshua.kramer', the description 'Hotlist containing employee records.', and the 'Last Updated' date '1/25/2023'. A red pencil icon is visible to the right of the hotlist details. Below the details, there is a 'BACK TO HOTLISTS' link and a 'Total Records' indicator showing '0 Total Records'. A red box highlights the pencil icon in the top right corner of the details section.

To **delete** a hotlist, select the  icon to the right of the hotlist within record type dropdowns and select "Delete":

List Name	List Description	List Type
		All
MY LISTS		ALL LISTS
Employees 1		
> Employee Hotlist <small>Owned by joshua.kramer</small>	Hotlist containing employee records.	Last Updated <small>1/25/2023</small>
		Rows per page: 20 1 of 1 <div style="border: 1px solid red; padding: 2px; display: inline-block;"> Delete </div>


Select "Confirm" within the prompt to delete the hotlist:




Note If you have access to view "Private" hotlists from other users, you will also have the ability to delete those hotlists.

Functionality Available Within a Hotlist

Within the hotlists, different functionality is available for employees, customers, and contacts.

Note You can export any type of hotlist by navigating to B Menu > Hotlists > Select a hotlist that contains records > Select the  icon to the right of the hotlist records:

Hotlists / Details									
← BACK TO HOTLISTS									
Contact Hotlist 3 Total Records <small>Contact Hotlist</small>									
									
Drag a column header here to group by that column									
<input type="checkbox"/>	Position	Active	Contact Id	Name	Customer Name	Department Name	Title	Office Phone	Email
<input type="checkbox"/>	1	☺	2489	Alaska, Jimmy	123 Nursing	Primary	Mr.	(651) 230-9932	⋮
<input type="checkbox"/>	2	☹	2564	Cricket, Jimmeny	123 Nursing	123zz			⋮
<input type="checkbox"/>	3	☺	2995	Doe, John	123 Nursing	Primary	Stainer	(555) 555-3486	⋮
Rows per page: 20 1 of 3 < 1 >									

By selecting the "Export" option, you will be able to select whether you want the list in Excel or CSV format.

Employee Hotlist Functionality

Navigate to B Menu > Hotlists > Select a hotlist that contains records.

Select multiple records from the hotlist and select the "# Selected Items" dropdown for the following options:

- Text Employees (if a texting integration is enabled and you have texting credentials setup)
- Email
- Log Message
- Make Candidates
- Make Job Offers
- Assign
- Edit Hotlist Members

Assigned	Employee Id	Name	Hotlist Step	Hotlist Note	Phone Number	Email	Last Message	La
⊗	11971	Barker, Roberto					Jan 23, 2023 7:07	⋮
⊙	5049	Barker, Shannon					Jan 23, 2023 7:07	⋮
⊙	5414	Beach, Tracy					Jan 23, 2023 7:07	⋮

Additionally, you can select the  icon to the right of the record within the hotlist for the following options:

- Edit
- Remove

Position	Active	Assigned	Employee Id	Name	Hotlist Step	Hotlist Note	Phone Number	Email	Last Message	La
1	⊙	⊙	5414	Beach, Tracy					Jan 23, 2023 7:07	⋮
2	⊙	⊙	5755	Brown, Sherry					Jan 23, 2023 7:07	⋮
3	⊙	⊙	5759	Aardson, Steve					Jan 23, 2023 7:07	⋮
4	⊗	⊗	12866	White, Terrence					Sep 13, 2016 8:17	⋮

By selecting "Edit", the "Edit Hotlist Member" window will open with the following options:

- Hotlist Step: This column allows you to track the status of an employee in relation to this specific hot list. This is not correlated to a candidate status (tied to an order) nor is it logged, or visible, on the employee's record.
- Hotlist Note: A note for the record of the hotlist.
- Hotlist Position: The position the record will appear within the hotlist.

Edit Hotlist Member

Hotlist Step
Accepted

Hotlist Note
Note

* Hotlist Position
1
Enter a number between 1 and 18

SAVE AS DRAFT CANCEL SUBMIT

By selecting "Remove", you can select "Confirm" within the prompt to remove the record from the hotlist:

Confirm Remove

Are you sure you would like to remove this member?

CANCEL CONFIRM

Customer Hot List Functionality

Navigate to B Menu > Hotlists > Select a hotlist that contains records.

Select multiple records from the hotlist and select the "# Selected Items" dropdown for the following options:

- Log Message

Hotlists / Details


← BACK TO HOTLISTS

2013 Prospects 15 Total Records
hot list fo customers

3 selected items Clear Selection

Log Message for 3 Recipients >

<input type="checkbox"/>	Position	Customer Id	Customer Name	Department Name	Office Phone	Last Message	Notes	
<input type="checkbox"/>	1	778929	ASCS, Inc.	Primary	(651) 736-9736 ext. 123	Apr 25, 2008 5:27 PM	New Construction Cleaning Business Needs cleaning peop...	⋮
<input type="checkbox"/>	2	778967	Ames Construction, Inc.	Primary	(651) 878-9878 ext. 123	Dec 21, 2018 6:25 PM		⋮
<input type="checkbox"/>	3	778933	Barry's Dome Dogs	Primary	(651) 738-9738 ext. 123	Oct 4, 2013 8:20 PM	Food vendor for the Metrodome in Minneapolis, MN autod...	⋮
<input type="checkbox"/>	4	778977	Anderson Consulting	Primary	(651) 909-9909 ext. 123	Feb 27, 2009 1:38 PM	Test Note autodeact:01/21/15	⋮
<input type="checkbox"/>	5	778990	ABC 123	Primary	(651) 577-1577 ext. 123	Jul 29, 2014 6:49 PM		⋮
<input checked="" type="checkbox"/>	6	779071	Best Buy	Primary	(651) 575-0575 ext. 123	Aug 15, 2013 1:17 PM	autodeact:01/21/15	⋮
<input checked="" type="checkbox"/>	7	779088	Excel Energy	Corporate Office	(651) 759-0759 ext. 123	Dec 21, 2018 7:54 PM	Largest scaffolding rental company in south Florida	⋮
<input checked="" type="checkbox"/>	8	779126	Creative Intentions Inc	Primary	(651) 452-9786	Jun 28, 2010 4:22 PM	IT Consulting company autodeact:01/21/15	⋮

Additionally, you can select the  icon to the right of the record within the hotlist for the following options:

- Edit
- Remove

Hotlists / Details

← BACK TO HOTLISTS


Customers 6 Total Records
My test customer list


1 selected item Clear Selection

Drag a column header here to group by that column

<input type="checkbox"/>	Position	Customer Id	Customer Name	Department Name	Office Phone	Last Message	Notes	
<input type="checkbox"/>	1	4294969431	Tempworks Software	Primary		Feb 7, 2013 2:30 PM	autodeact:01/21/15	⋮
<input type="checkbox"/>	2	4294969452	Microsoft	Primary		Aug 29, 2019 1:49 PM	autodeact:01/21/15	⋮
<input checked="" type="checkbox"/>	3	4294969433	DC Comics	Primary		Jul 24, 2013 5:47 PM		⋮
<input type="checkbox"/>	4	779254	RSC Rental	Primary	(651) 105-2105 ext. 123	Feb 27, 2013 12:00 AM	Hottest!! autodeact:01/21/15	⋮
<input type="checkbox"/>	5	779071	Best Buy	Primary	(651) 575-0575 ext. 123	Aug 15, 2013 1:17 PM	autodeact:01/21/15	⋮
<input type="checkbox"/>	6	777956	ACME Auto Parts	Primary	(651) 731-6731 ext. 123	Jan 18, 2023 4:38 PM	autodeact:06/01/06	⋮

⋮

 Edit

 Remove

By selecting "Edit", the "Edit Hotlist Member" window will open with the following options:

- Note: A note for the record of the hotlist that will also update on the customer record.
- Hotlist Position: The position the record will appear within the hotlist.

Edit Hotlist Member

Note

* Hotlist Position

3

Enter a number between 1 and 6

SAVE AS DRAFT CANCEL SUBMIT

By selecting "Remove", you can select "Confirm" within the prompt to remove the record from the hotlist:

Confirm Remove

Are you sure you would like to remove this member?

CANCEL CONFIRM

Contact Hot List Functionality

Navigate to B Menu > Hotlists > Select a hotlist that contains records.

Select multiple records from the hotlist and select the "# Selected Items" dropdown for the following options:

- Email
- Log Message
- Text Contacts (if a texting integration is enabled and you have texting credentials setup)

Hotlists | Details

[← BACK TO HOTLISTS](#) ✎

Contact Hotlist 3 Total Records
Contact Hotlist

3 selected items Clear Selection ↓

✉ Email

✉ Log Message for 3 Recipients >

✉ Text 3 Contacts

	Contact Id	Name	Customer Name	Department Name	Title	Office Phone	Email
<input checked="" type="checkbox"/>	2489	Alaska, Jimmy	123 Nursing	Primary	Mr.	(651) 230-9932	⋮
<input checked="" type="checkbox"/>	2564	Cricket, Jimmy	123 Nursing	123zz			⋮
<input checked="" type="checkbox"/>	2995	Doe, John	123 Nursing	Primary	Stainer	(555) 555-3486	⋮

Rows per page: 20 1-3 of 3 < 1 >

Additionally, you can select the ⋮ icon to the right of the record within the hotlist for the following options:

- Edit

- Remove

Hotlists / Details

← BACK TO HOTLISTS

Contact Hotlist 3 Total Records
Contact Hotlist

1 selected item Clear Selection

Drag a column header here to group by that column

<input type="checkbox"/>	Position	Active	Contact Id	Name	Customer Name	Department Name	Title	Office Phone	Email
<input checked="" type="checkbox"/>	1	☑	2489	Alaska, Jimmy	123 Nursing	Primary	Mr.	(651) 230-9932	
<input type="checkbox"/>	2	☒	2564	Cricket, Jimmy	123 Nursing	123zz			
<input type="checkbox"/>	3	☒	2995	Doe, John	123 Nursing	Primary	Stainer	(555) 555-3486	

By selecting "Edit", the "Edit Hotlist Member" window will open with the following options:

- Note: A note for the record of the hotlist that will also update on the contact record.
- Hotlist Position: The position the record will appear within the hotlist.

Edit Hotlist Member

Note
New Contact

* Hotlist Position
1
Enter a number between 1 and 3

SAVE AS DRAFT CANCEL SUBMIT

By selecting "Remove", you can select "Confirm" within the prompt to remove the record from the hotlist:

Confirm Remove

Are you sure you would like to remove this member?

CANCEL CONFIRM

Related Articles