Beyond - In-App Notifications

Last Modified on 07/23/2026 3:27 pm CDT

Overview

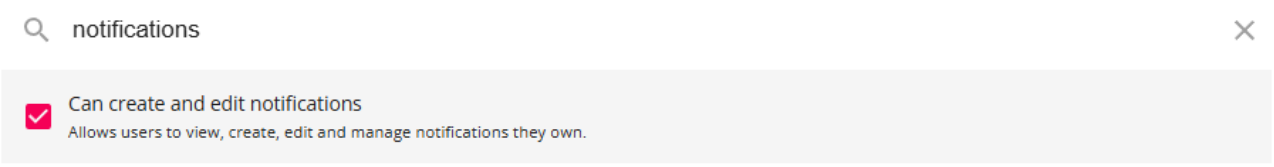
With in-app notifications, you are able to create, send, and receive custom notifications, all directly within Beyond.

Notification Topic	Notification Title	Notification Text	Delivery Location	Application	Last Sent	Status	Last Modified	
General	This is to all recipients	This is to all recipients	In-App	Beyond		Not Sent	June 16th 2026 11:21 AM	⋮
General	Client Visit Tomorrow	A client will be visiting the offic...	In-App	Beyond	June 8th 2026 12:39 PM	Sent	May 21st 2026 8:37 AM	⋮
General	Time Submission Reminder	Please remember to submit y...	In-App	Beyond	April 9th 2026 9:41 AM	Processing...	April 17th 2026 10:08 AM	⋮
Assignments	Test notification: all sales teams	Test notification: all sales tea...	In-App	Beyond	June 16th 2026 7:42 AM	Sent	June 16th 2026 7:42 AM	⋮
Customers	Test notification: all service re...	Test notification: all service re...	In-App	Beyond	June 16th 2026 7:42 AM	Sent	June 16th 2026 7:42 AM	⋮
General	Can I send notification to no a...	Can I send notification to no a...	In-App	Beyond	June 16th 2026 11:18 AM	Sent	June 16th 2026 11:17 AM	⋮
General	This is checking the status "Pr...	This is checking the status "Pr...	In-App	Beyond	June 16th 2026 11:15 AM	Sent	June 16th 2026 11:15 AM	⋮

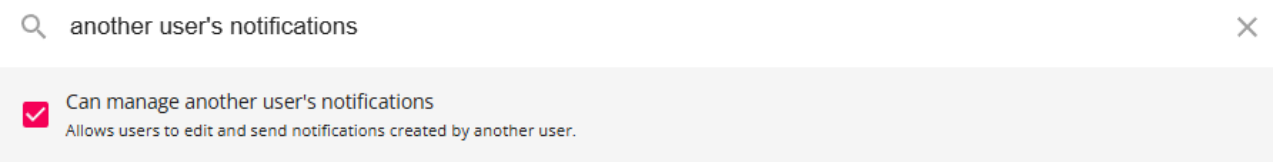
Note In-app notifications are **only** available for TempWorks Hosted clients.

Permission Requirements

To create and manage notifications, you will need to be a member of a Security Group that contains the "Can create and edit notifications" permission:

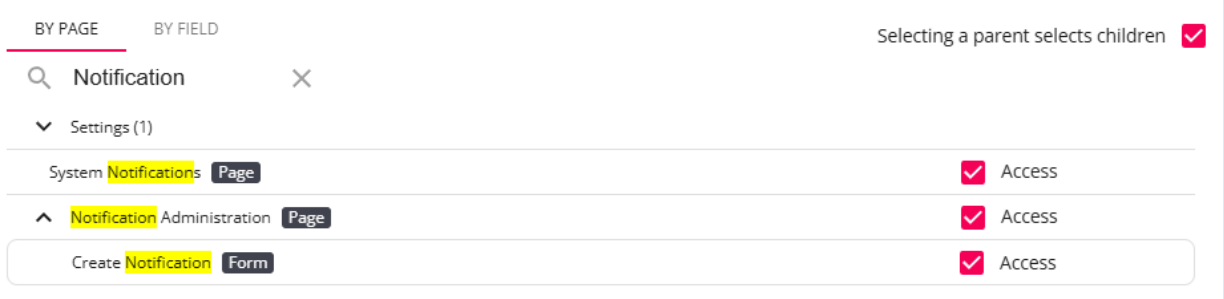


Optionally, with the "Can manage another user's notifications" permission, you will have the ability to edit and send notifications that had been created by another service rep:



Both the "Can create and edit notifications" and "Can manage another user's notifications" permissions are included within the "TempWorks Default - Administrator" Security Group.

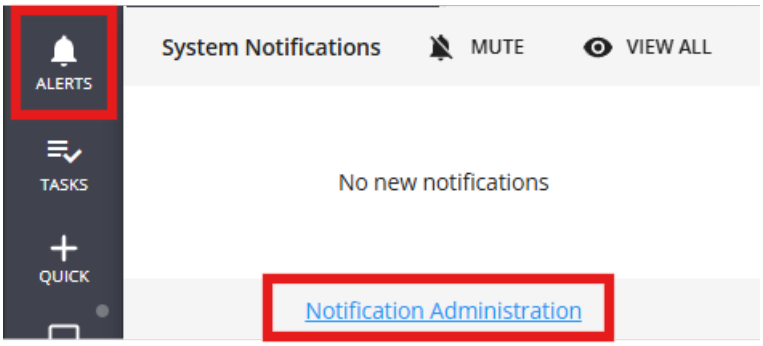
Note If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "System Notifications" and "Notification Administration" pages along with the "Create Notification" form to the Security Groups that require the functionality:



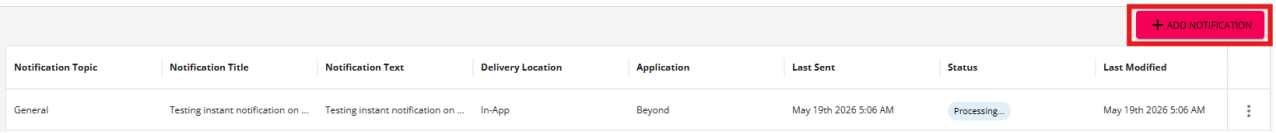
For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "Beyond - Creating Security Groups with Advanced Permissions".

Creating Notifications

To begin creating custom notifications, navigate to the "Alerts" bell on the left and select "Notification Administration":



Within the "Notifications" screen, select the "+ Notification" option at the top right to open the "Create Notification" window:



Within the "Notification Details" step, enter/select the following:

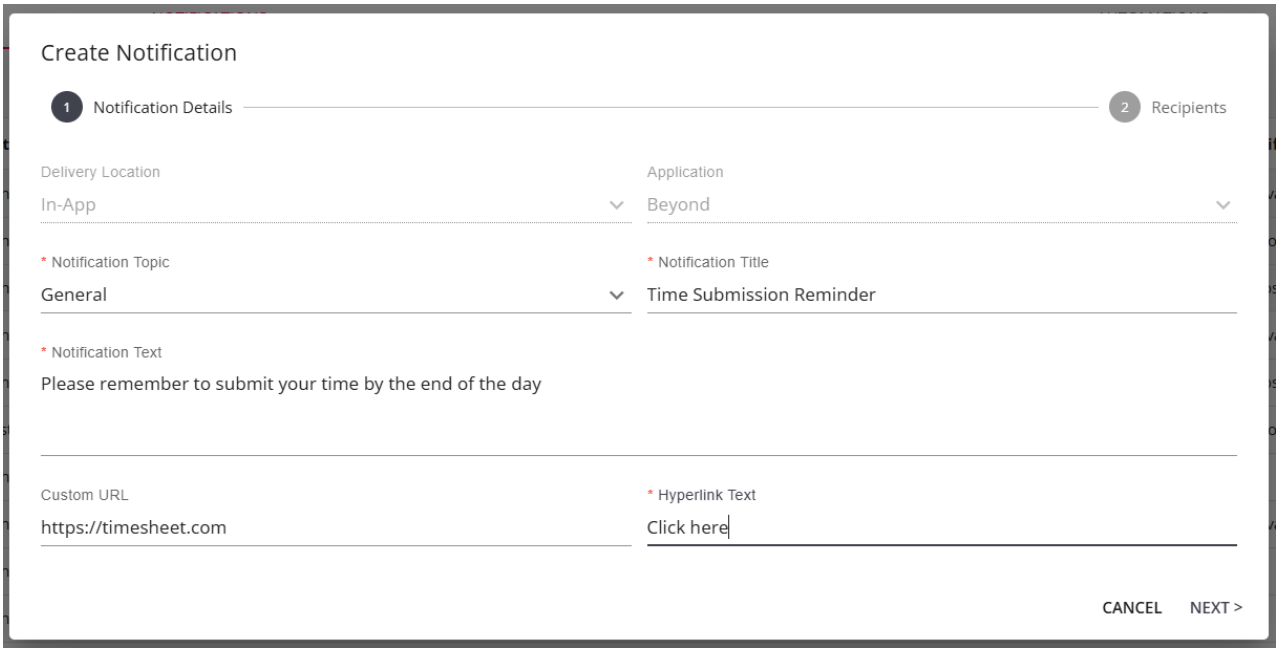
- **Notification Type**: Used to categorize notifications by type/topic, making them easier to manage and organize.
  - General
  - Employees

    - Customers
    - Contacts
    - Job Orders
    - Assignments
- **Notification Title**: The name of the notification being created.
- **Notification Text**: The body of the notification that is being sent to the service rep(s).
- **Custom URL**: Allows the inclusion of a relevant link within the notification, directing the recipient to a specified web page.
- **Hyperlink Text**: The text that will show within the notification that contains the hyperlink provided within the "Custom URL" field.

Note Please keep in mind the following character limits within each field when composing your notification:

- **Notification Title**: Maximum 48 characters
- **Notification Text**: Maximum 256 characters
- **Hyperlink Text**: Maximum 48 characters; this field becomes required if a "Custom URL" is entered
- **Custom URL**: Maximum 2,000 characters; must begin with https://

Once all of the information has been entered, select "Next" to continue:



Within the "Recipients" step, you will see a preview of the notification along with the ability to select recipients for the notification:

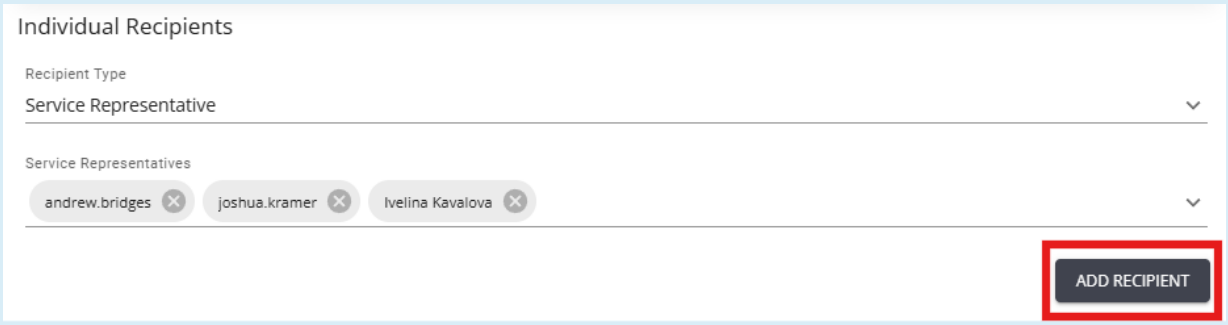


Select the appropriate "Recipient Type" from the dropdown:

- Sales Team
- Service Representative
- Service Representative Team

Note The available recipients within each type are based on your current hierarchy when creating the notification.

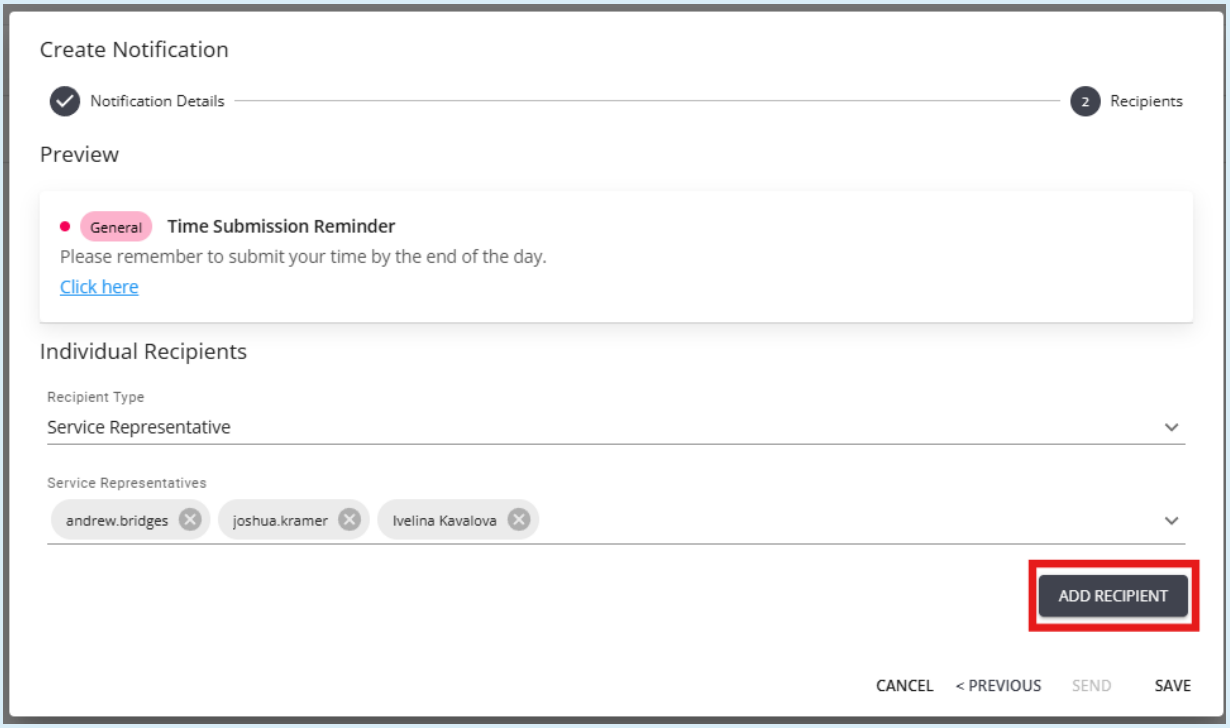
Note To be able to send a notification, you must add at least one recipient by selecting “Add Recipient”:



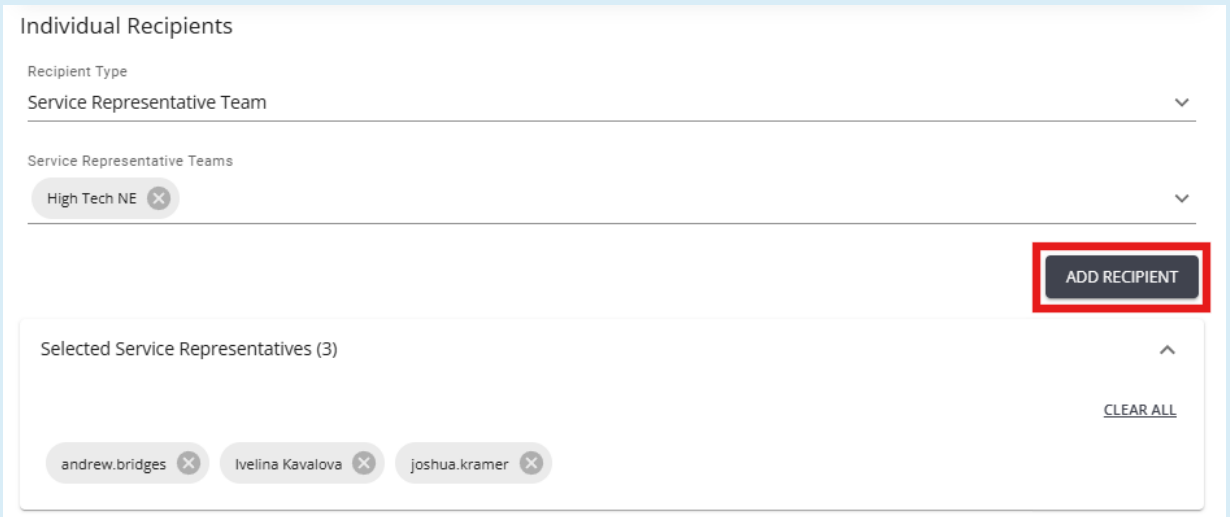
Only selecting a recipient does **not** add them to the recipient list.

Note If you have multiple types of recipients you want the notification to be sent to, you can add combinations of recipient types to your custom notification, ensuring you select "Add Recipient" before moving to the next type.

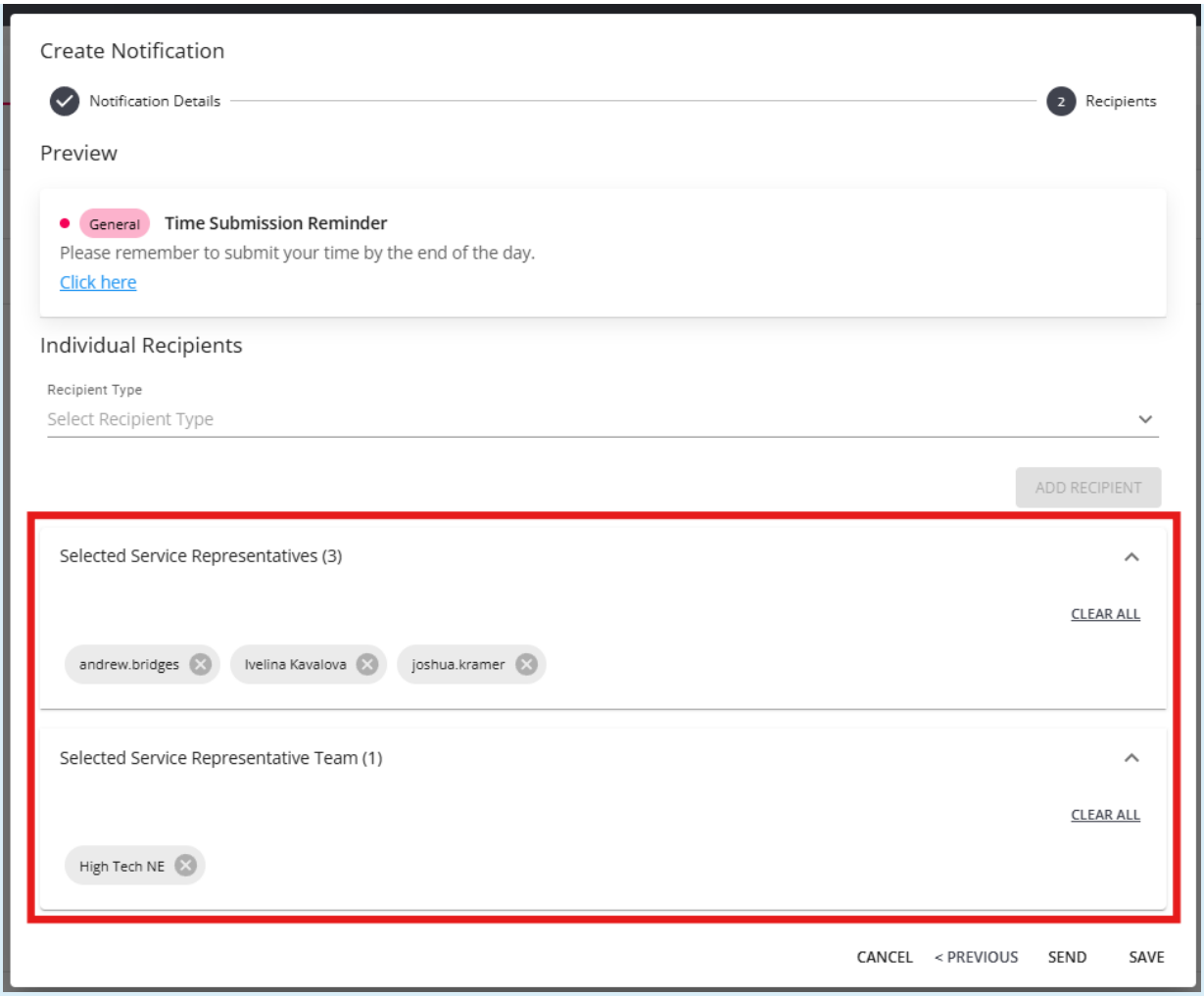
For example, we can begin by adding a few individual service representatives that we want the notification to be sent to and selecting "Add Recipient":



We also know that outside of those individual service reps, we want the notification sent to our Northeast branch. We will select the "Service Representative Team" option within the "Recipient Type" dropdown, find our intended team, and select "Add Recipient":



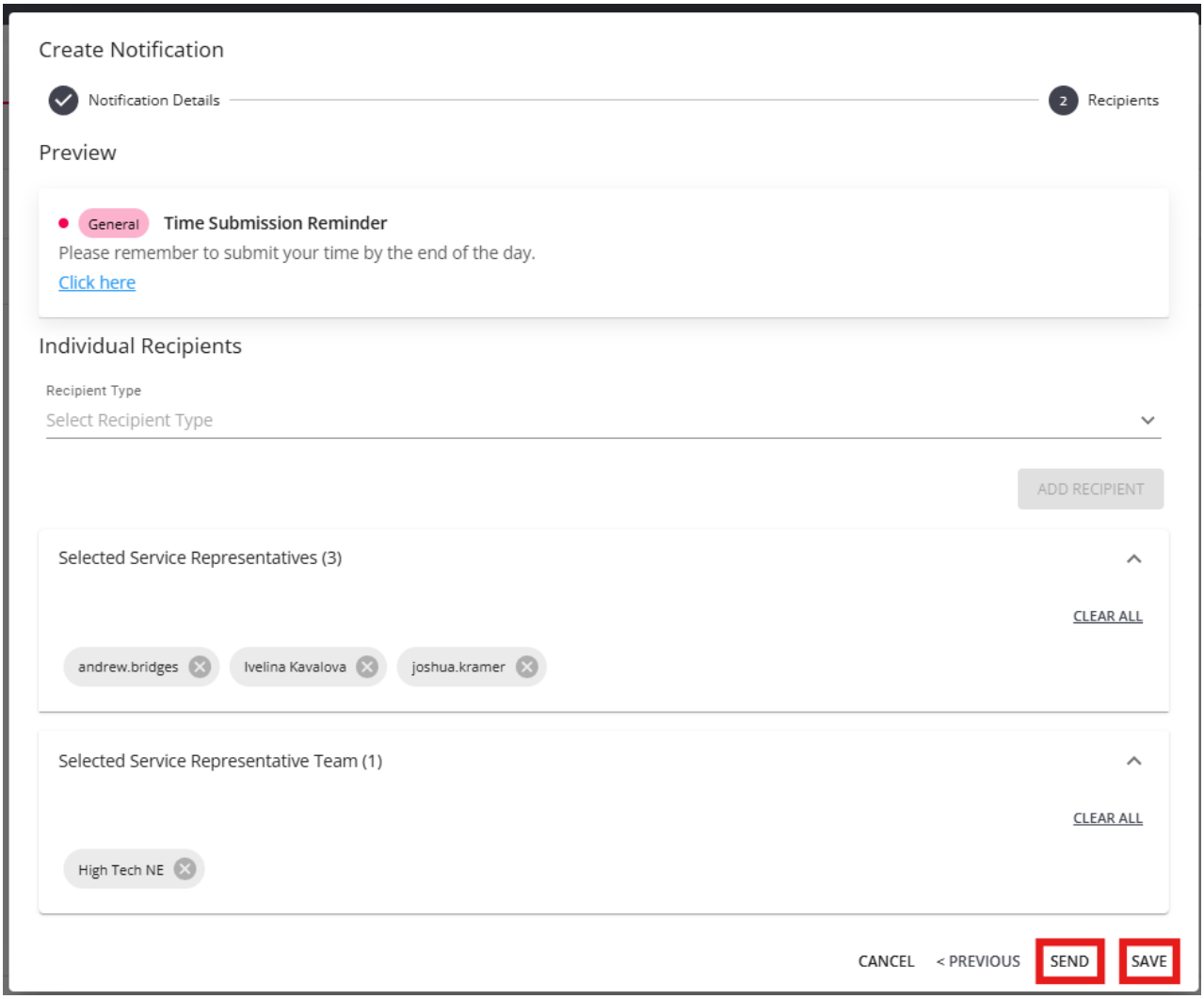
Once complete, we will see both the individual service reps along with the service rep team added as recipients to our notification:



Once the intended recipients have been added, select one of the following options:

- **Send:** Sends the notification to the recipients selected.
- **Save**: Saves the notification to be sent at a later time from the "Notifications Administration" window.

Note Notifications can be saved with or without recipients added.



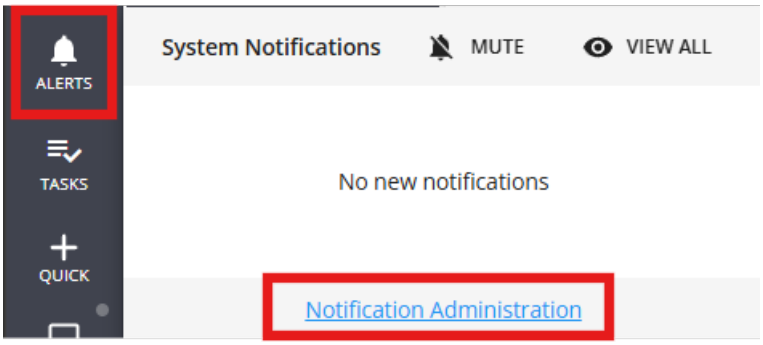
Sending Notifications

Notifications can be sent via two methods:

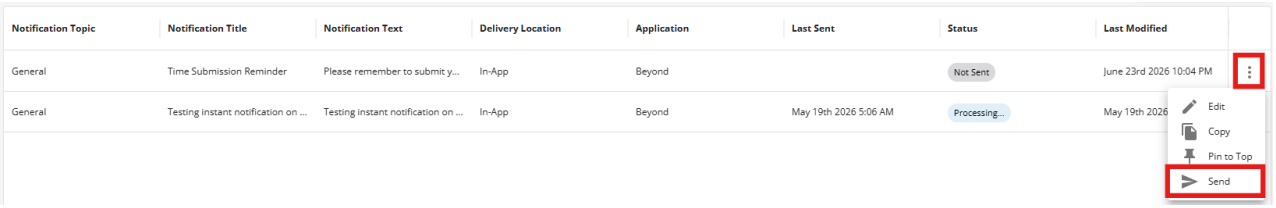
- Within the "Create Notification" window (as explained within the previous section of this article)
- Within the Notification Administration grid

Note At this time, notifications are sent instantly and once (unable to be scheduled as recurring).

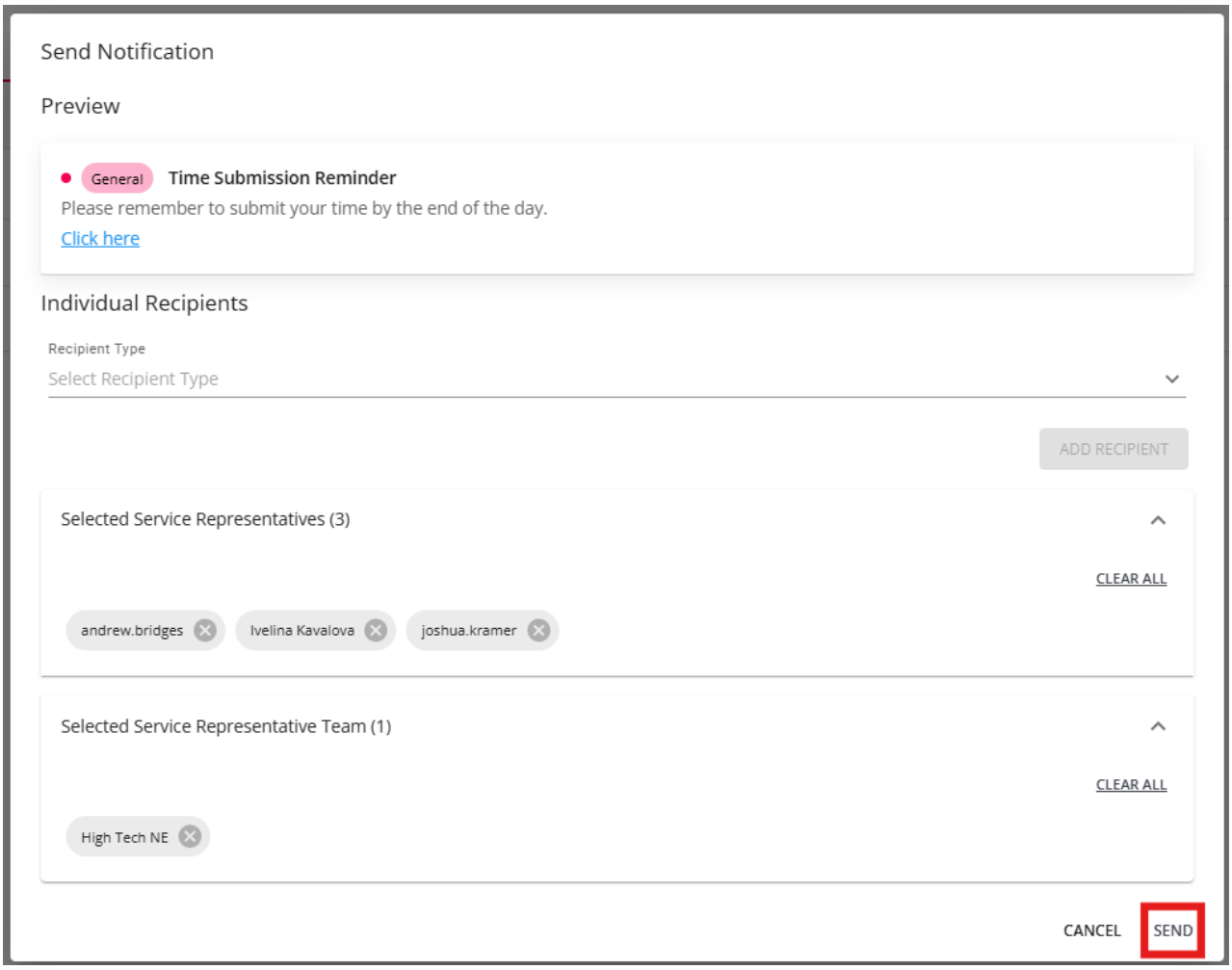
Navigate to the "Alerts" bell on the left and select "Notification Administration":



Within the "Notifications" screen, select the ⋮ to the right of the notification and select "Send":



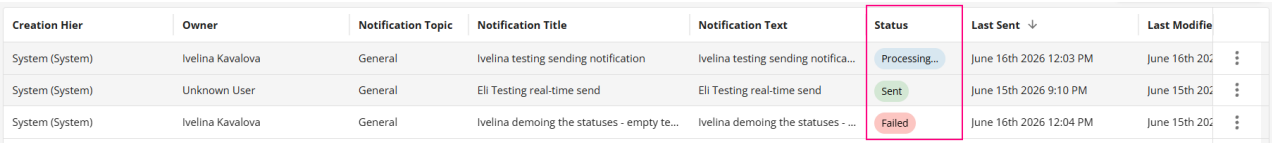
Verify the notification along with the recipient(s) and select "Send" to send the notification:



Note If you modify the recipient list when sending a notification directly from the Notification Administration grid, your changes will **not override and replace** the original recipient list.

Once notifications are sent, they will be given a specific status:

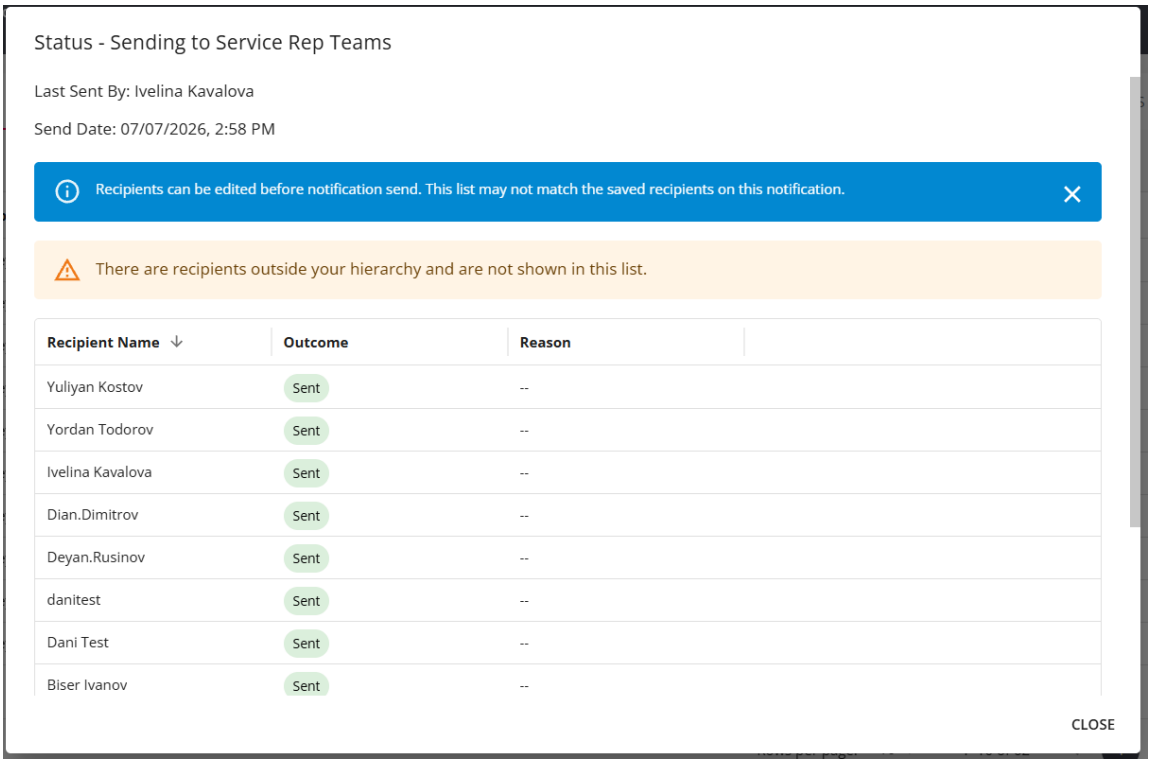
- **Not Sent**: Indicates a notification that has been created as a draft but has not yet been sent.
- **Processing**: Indicates the notification is in the process of being sent to the recipient(s).
- **Sent**: Indicates a notification has been sent successfully to the recipient(s).
- **Failed**: Indicates a notification has **not** been sent to the recipient(s).



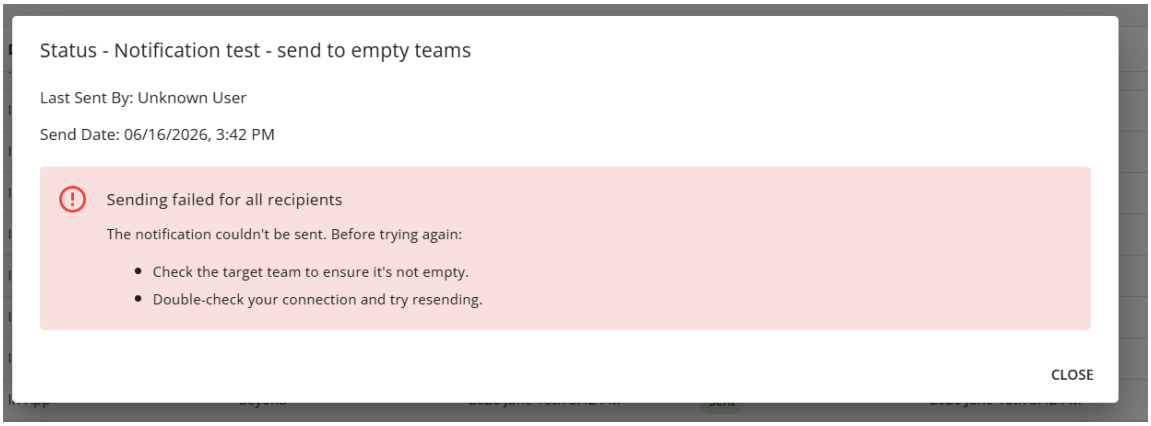
Creation Hier	Owner	Notification Topic	Notification Title	Notification Text	Status	Last Sent	Last Modifie
System (System)	Ivelina Kavalova	General	Ivelina testing sending notification	Ivelina testing sending notifica...	Processing...	June 16th 2026 12:03 PM	June 16th 202
System (System)	Unknown User	General	Eli Testing real-time send	Eli Testing real-time send	Sent	June 15th 2026 9:10 PM	June 15th 202
System (System)	Ivelina Kavalova	General	Ivelina demoing the statuses - empty te...	Ivelina demoing the statuses - ...	Failed	June 16th 2026 12:04 PM	June 15th 202

Selecting a notification status of "**Sent**" or "**Failed**" will show you the recipient details:

- Clicking the "**Sent**" status opens a dialog with a list of all recipients the notification was last sent to:
  - Recipients can be edited before the notification is sent and this list may differ from the recipients saved on the notification.
  - To view all recipients a notification was sent to, you will need to be at the same hierarchy level or higher compared to the notification itself, otherwise you'll only see recipients in your current hierarchy view.

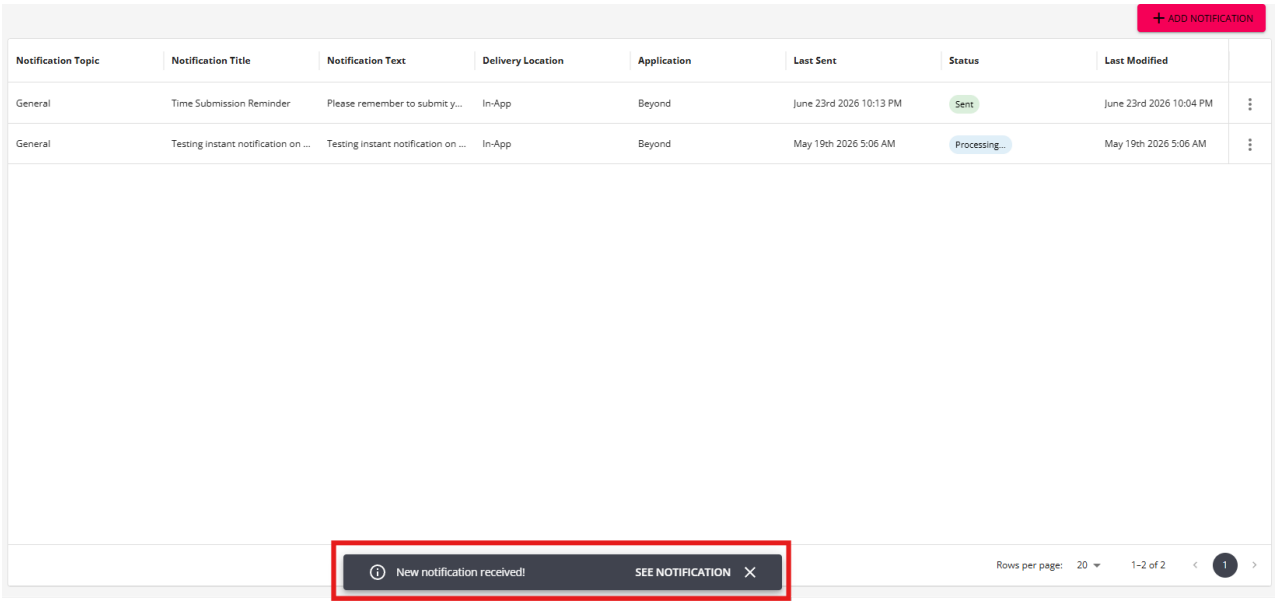


- Clicking the "**Failed**" status opens a dialog that contains the error message:
  - The two main reasons for notifications not being sent include an empty recipient list (team with no members) and/or connection issues.



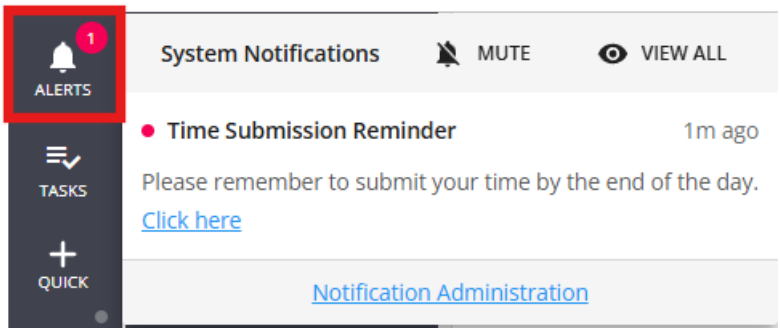
Receiving and Viewing Notifications

Notifications are delivered in real time to users who are actively logged in to Beyond at the moment the notification is sent:

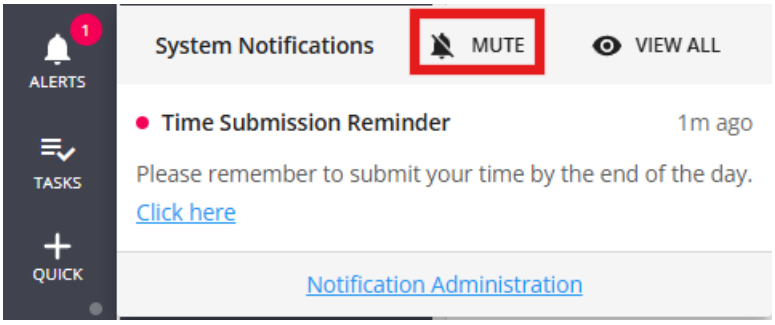


Note If you are logged out or disconnected when a notification is delivered, you will not receive the pop-up alert within the application. However, the notification will still be saved to your inbox and will appear the next time you log in and visit the System Notifications page.

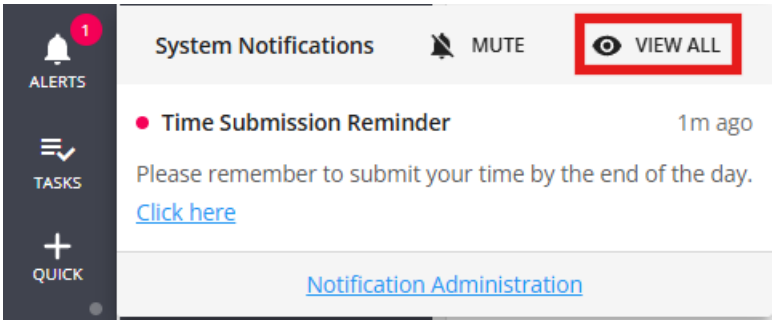
Navigating to the "Alerts" bell on the left will display your five most recent notifications, along with a badge count of unread notifications:

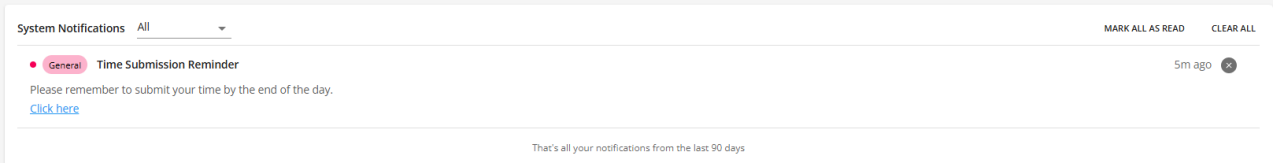


Selecting "Mute" will suppress the pop-up alert within the application and does **not** remove notifications from your inbox:



Select "View All" to see your entire notification history on the "System Notifications" page:

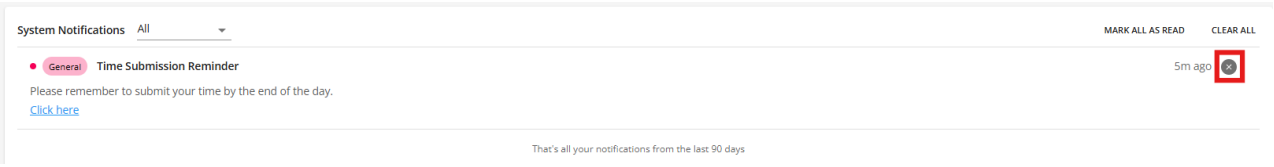




Note The "System Notifications" page displays notifications received within the past 90 days.

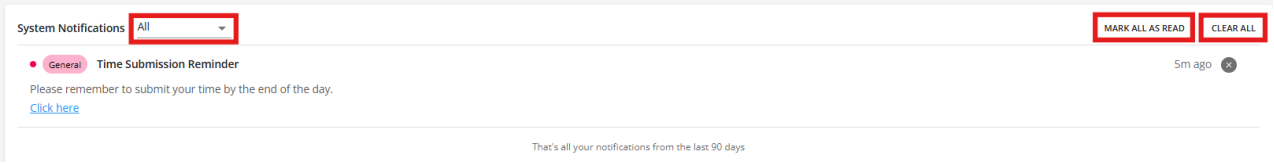
Notifications older than 90 days will no longer appear in your inbox.

Within the "System Notifications" page, you can select individual notifications to be marked as "read" and you can remove notifications from the list by selecting the "X" at the top right of the notification:



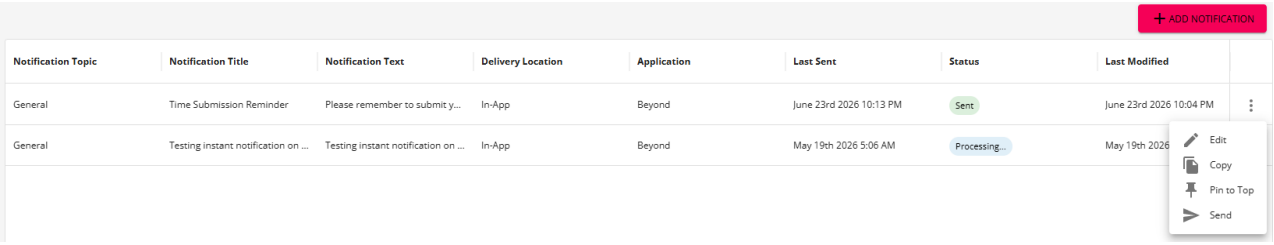
You also have the following options:

- **Filter**: You can filter received notifications by “Unread” or “All”.
- **Mark All As Read**: Marks all notifications you’ve ever received as "read".
- **Clear All**: Removes all notifications you’ve ever received from your list.



Managing Notifications

Within the "Notifications Administration" page, you will have the ability to add, edit, copy, pin, and send notifications:



Edit Notifications

When editing notifications, please keep in mind the following:

- You need to be at the same hierarchy level or higher compared to the notification itself, including for notifications you own.
- To edit notifications owned by other users, you need to be a member of a Security Group with the “Can manage another user’s notifications” permission.

Copy Notifications

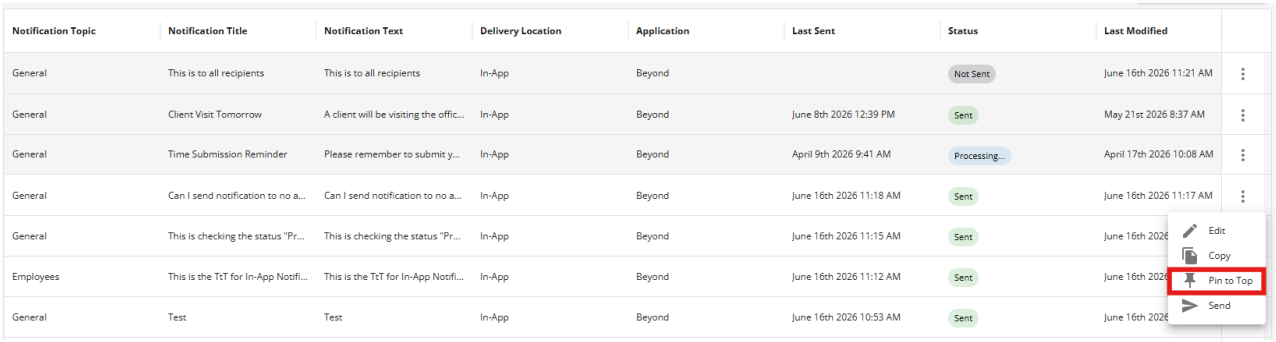
When copying notifications, please keep in mind the following:

- Anyone with access to the "Notification Administration" page can copy an existing notification, no additional permissions required.
- Copying a notification replicates the "Notification Details" step of the "Create Notification" window,

including the Notification Type, Title, Text, and URL (if applicable). The recipient list will need to be added manually.

Pin Notifications

Use the "Pin" option to keep important notifications readily accessible at the top of the "Notification Administration" grid:



When pinning notifications, please keep in mind the following:

- You can pin up to 5 notifications at one time.
- If you have already have 5 notifications pinned, you must unpin an existing notification before you can pin another.
- Pinned notifications are tied to your user account across all hierarchy levels. This means:
    - If you pin 5 notifications while working at one hierarchy level, those pins count toward your limit regardless of which hierarchy level you are currently located within.
    - When you switch to a different hierarchy level, some or all of your pinned notifications may not be visible at that level, however, your 5-pin limit is still considered full.
    - As a result, the ability to pin additional notifications will be disabled even if no pinned items are visible in your current view.
    - To free up a pin slot, navigate back to the hierarchy level where the notification was originally pinned and unpin it from that view.

Related Articles