Beyond - Message Logging

Last Modified on 07/25/2023 3:20 pm CDT

Why Should You Log Messages?

Message logging is often brushed over or set aside but can be extremely helpful to you and your team. You can log messages on employee, customer, order, and assignment records in Beyond.

This article covers the following:

- 1. How to Log a Message in Beyond
 - Linking Records
 - Uploading/Attaching Documents
 - Adding URL's
 - Copying Message Text
- 2. Logging Messages from Search Results
- 3. How to Edit Messages in Beyond
- 4. Searching by Message

Here are some reasons our team recommends utilizing the message logging options:

- 1. For Productivity Reporting
 - Messages are both searchable and reportable. That means you can see averages for your team as well as drill into specifics on which of your reps are doing what each week. This is a great way to see what methods of contacting your clients or prospects seem to work as well as employee call trends, etc. If you are utilizing message action codes, you can see how many emails, phone calls, no shows, etc. you have had within a specific time period.
 - Check out the following default reports that contain message information:
 - Message Productivity Report
 - Customer Message Report
 - Contact Message Report
 - Employee Messages Report
 - Messages Report
- 2. For Unemployment Claims
 - Wouldn't it be nice to have an up-to-date record that showed every time an employee was offered a
 position and declined or every time they called in late or never showed up? That's exactly what
 messages are for! Logging these incidents not only shows your staff if there are reoccurring themes for
 some employees but can also show if the employee has actually been offered different positions and is
 just declining or not showing.
- 3. For Creating the Best Experience for your Customers, Contacts, Employees, and Internal Staff
 - Message logging helps keep track of conversations your service reps are having with different people

your company works with. So, when you log a message that you left a voicemail for someone and they call back, a different service rep can pick up where the last one left off. This means better work-life balance for your recruiters and sales teams as well as better experiences for your employees and customers.

Note When logging a message, the hierarchy of the message is set at the hierarchy you are at when creating the message. Therefore, make sure you and/or other users are at the appropriate hierarchy when logging messages within Beyond.

For more information on hierarchy, please see the article titled Beyond - Hierarchy.

How to Log a Message in Beyond

Messages can be found on the Employee, Customer, Contact, Order, Assignment, and Prospect Records from the visifile and from the Messages Tab.

Logging the Message

- 1. Navigate to the Messages tab or the Visifile card on the record you want to log a message for
- 2. Select the + to add a new message

VISIPILE DETAILS V DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAYSETUP V ONBOARDING PAYHISTORY V CUSTOM DATA WIRI PAGE EMPLOYEE EXISTING PAGE DATAFRENZY EMPLOYEE PAGE POST FF PAGE		t≡				
✓ Snapshot						
~ Nore		0				
 Contact Information 		•				
∧ Messages		•				
TODAY						
O Message: Jul 26m, 11:58 AM Plasse contact TempWorks Support for assistance - https://www.tempworks.com/support/	joshua.kramer	:				
July 3022						
V Q 1st Interview w/ cilent - Jul 12n, 944 AM Test	velina Toshkova	:				
JUNE 2022						
V Q Interview Prep : Jun 7bt, 7.01 AM Message	velina Toshkova	:				
May 2022						
V S Message - May Stat, 6.48 AM	velina Toshkova	:				
GO TO MESSAGES PAGE						
From the Visifile						

WSIFILE DETAILS V DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAY SETUP V ONBOARDING PAY HISTORY V CUSTOM DATA WIR PAGE EMPLOYEE EXISTING PAGE DATAFRENZY EMPLOYEE PAGE	POST FF PAGE
Filter by message text	≂Q +
13 messages DATE 7/26/2022	SORT BY Date Created DESC ~
TODAY	
Bessage - Jul 2den, 11-58 AM Please contact TempWorks Support for assistance - https://www.tempworks.com/support/	joshua.kramer
JULY 2022	
Ist Interview w/ client - Jul 12th, 9-44 AM Test	Ivelina Toshkova
JUNE 2022	
 Interview Prep. Jun 7th, 7.01 AM Message 	Ivelina Toshkova 🚦
From the Messages Tab	

3. Enter the following information:

Compose Message		
* Message Reviewed new order details we received via email. Looking for 20 people in the next three weeks.		
* Action Called out to Staff Part		~
Linked Records	×	+
Create a task		
Upload New Document		
Attach Existing Document		
SAVE AS DRAFT	CANCEL	SUBMIT

- Write down your notes about the call/email/interaction/etc.
- Select an appropriate Action code.
- Optionally, link additional related records.
- Optionally, select the checkbox to create a follow-up task.
- Optionally, upload a new and/or attach an existing document to the message.
- 4. Select Submit

Note Message Action Codes are created and managed by your admin in Enterprise. The default message action is typically just "Message" but we recommend using more specific codes to help with reporting and searching options.

For example, logging a "Late" message when someone calls saying they will be late or "1st AR Call" when you call a client about an invoice so you know more specifically what kind of call happened.

Note Messages in Beyond have a maximum length of 7000 characters. Please limit length to this to avoid an error message.

Linking Records

When you log a message, you have the option to link additional related records. For example, you might be logging a message on a customer record and want to link the contact you talked to so the message will log on both.

Select the + to link a record

Compose Message		
* Message Reviewed new order details we received via email. Looking for 20 people in the next three weeks.		
* Action Called out to Staff Part		~
Linked Records		+
Create a task		
Upload New Document		
Attach Existing Document		
SAVE AS DRAFT	CANCEL	SURMIT
SAVE AS DRAFT	CANCEL	SUBMIT

Select the record type you want to search for (ex. contact or employee) & enter any additional search criteria before selecting search:

Searching fo	Employees			
Last Nama	Customers		First Name	
	Contacts	L		
Id	Assignments		SSN	
	Job Orders	t		
Assigned Either	Prospects	Ŧ	Active Status Active	Ŧ
Branch		-		
		SE/	ARCH	
			CANCEL	ок

Select the record(s) you want to link:

Compose Message		
* Massana	Searching for EMPLOYEES V Filter on Active Status, Last Name =	
Reviewed new order d	Eaddy, Gary 24361 325330338 · High Tech SE 24361	
* Action Called out to Staff Part	Eades, ARMANDO 24289 325330266 · High Tech SE 24289	•
Linked Records	Eagen, Joshua D. 21260 756571954 · High Tech SE 21260	+
Create a task	Ealy, Scott 22981	
Upload New Docur	Earnhardt, Dale 4295055302 452851652 · High Tech NW 4295055302	
Attach Existing Doo	Easler, Eric 756569580 · High Tech SE 19088	
SAVE AS DRAFT	CANCEL OK	CANCEL SUBMIT

Select OK to finalize your options or click on the searching for option in the upper left to change your search.

Compose Message		
* Message Reviewed new order details we received via email. Looking for 20 people in the next three weeks.		
* Action Called out to Staff Part		Ŧ
Linked Records	×	+
Create a task		
Upload New Document		
Attach Existing Document		
SAVE AS DRAFT	CANCEL	SUBMIT

Note Beyond automatically links and displays the following:

• When logging a message on a contact record, Beyond will link to the related customer record:

Compose Message		
* Message		
Compose your message		
Message is required.		
* Action		
Message		*
Linked Records 123 Nursing - Primary	\times	+
Create a task		
Upload New Document		
Attach Existing Document		
SAVE AS DRAFT	CANCEL	SUBMIT

• When logging a message on an order, Beyond will automatically link the customer record:

* Message	
Compose your message	
Message is required.	
* Action Message	
Linked Records	
123 Nursing - production	×
Create a task	
Upload New Document	
Attach Evicting Document	

• When logging a message on an assignment, Beyond will automatically link the related employee,

customer, and order record:

Compose Message		
* Message		
Compose your message		
Message is required.		
* Action		
Message		
Linked Decorde		
Linked Records Steve Aardson (8) (123 Nursing - Primary (8) (123 Nursing, 12 hour Nurse (8))	×	+
Linked Records Einked Records Steve Aardson (2) (1) 123 Nursing - Primary (2) (1) 123 Nursing, 12 hour Nurse (2) Create a task	×	+
Linked Records Steve Aardson Ital IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIII	×	+
Linked Records Steve Aardson Ital 123 Nursing - Primary Ital 123 Nursing, 12 hour Nurse Ital Create a task Create a task Upload New Document Attach Existing Document	×	+
Linked Records Steve Aardson It is in a constraint of the second secon	×	+

Uploading/Attaching Documents to Messages

When creating/editing messages, you have the ability to upload new and attach existing documents to the message by selecting either the "Upload New Document" or "Attach Existing Document" checkbox depending on your preference:

Compose Message		
* Message For work placement, the Alexzander requires updated COVID vaccination records. Please attach the updated re message once acquired.	cords to th	nis
* Action Message		Ŧ
Linked Records	×	+
Create a task		
Upload New Document		
Attach Existing Document		
SAVE AS DRAFT	CANCEL	SUBMIT

After selecting the "Upload New Document" checkbox, an additional section will appear within the window to either drag and drop the document and click to search your computer for the document:

Note Please keep the following in mind when uploading new and attaching existing documents to messages:

- 1. A total combination of 5 newly uploaded and/or attached existing documents are allowed per message.
- 2. The file size limit, per document, is 26MB.

Compose Message		
* Message For work placement, the Alexzander requires updated C message once acquired.	COVID vaccination records. Please attach the updated records to	this
* Action Message		Ŧ
Linked Records	×	+
Create a task		
Vpload New Document		
	^	
Drop file	e here or <u>click to select a file.</u>	
0/5 Allo	(Max 25MB) owed Documents Attached	
Attach Existing Document		
SAVE AS DRAFT	CANCE	L SUBMIT

Compose Messag	ge - Compose Message		
1 Compose Message	e 2 Document Information 1/1	— 3 Su	mmary
* Message For work placement message once acqu	t, the Alexzander requires updated COVID vaccination records. Please attach the updated required.	cords to th	iis
* Action Message			Ŧ
Linked Records	8	×	+
Upload New Doc	cument Drop file here or <u>click to select a file.</u> Recommended .pdf, .doc, .txt (Max 25MB) 1/5 Allowed Documents Attached		
	Covid Vaccination Record Update - Alexzander Abbott.docx		
Attach Existing D	Document		
		CANCEL	NEXT >

After selecting the "Attach Existing Document" checkbox, an additional section will appear within the window to select a document that already exists within the "Documents" section of the employee's record:

Compose Message		
* Message Please attach Alexzander's updated resume to this message for the client.		
* Action Message		Ŧ
Linked Records	×	+
Create a task		
Upload New Document		
Attach Existing Document		
Select Document Select from available documents		^
Updated Resume - Alexzander Abbott.docx		
S Covid Vaccination Record Update - Alexzander Abbott.docx		Ľ

Once the document has been uploaded/attached to the message, select "Next" to navigate to the "Document Information" window where additional information can be entered related to the document that has been uploaded:

Note If you are attaching an existing document to the message, you will not need to verify the document information. Instead, simply select "Submit" to save the message.

Compose Message - Document Information 1/1				
Compose Message 2 Doc	ument Information 1/1		—— з Su	mmary
Covid Vaccination Record Update - Alexzander Abbott.docx 67 KB				Î
* Document Name	* Document Type			
Covid Vaccination Record Update - Alexzander Abbott.docx	COVID Proof of Booster			Ŧ
Description				
COVID Vaccination Update				
Expiration Date				
		CANCEL	< PREVIOUS	NEXT >

Note If you are uploading more than one new document to the message, you will need to go through the above document information window for each document being uploaded.

Once the information has been entered, you will be navigated back to the main "Compose Message" window to verify the information. Notice how the only information able to be edited at this point is the Action and the document itself. Select "Submit" to save the message. The uploaded document will now appear within the respective employees' documents within their record:

EMPLOYE	EMPLOYEE Alexzander Abbott (4295285903) / Documents								
	Alexzander A City, LA	bbott (42952	85903)						
VISIFILE	DETAILS 🗸	DOCUMENTS	MESSAGES	JOB MATCHING	ASSIGNMENTS S				
Docum	ents								
C	Covid Vaccina COVID Proof of	tion Record Up Booster 10/31/	odate - Alexz /2022	ander Abbott.do	CX :				
		No required d	ocuments a	dded yet					

Once a message has been saved that has attached documents, you will see the attachment icon to the right of the message along with the number of attached documents to said message:

 Messages 		Ð
TODAY		
Message - Oct 31st; 10:08 AM For work placement, the Alexzander requires updated COVID vaccination records. Please attach the updated records to this message once acquired.	0 joshua.kramer	:

Note Documents can also be accessed directly from messages based on your "Document Type" security group access which can be configured by navigating to B Manu > System Settings > Security > Document Types and selecting "Read" access for the types of documents that are being attached to messages:

Document Type Access	System	
Description		
Access for Document Types		
Permissions (55)	54 Can Read 54 Can W	/rite 54 Can Dele
Q Filter		
Acknowledgement Form	🔽 Can Read 🔽 Can Write 🗸	Can Delete
Applicant Portal Resume	🔽 Can Read 🔽 Can Write 🔽	Can Delete
Assessment	🔽 Can Read 🔽 Can Write 🔽	Can Delete
Background Check	🔽 Can Read 🔽 Can Write 🔽	Can Delete
Care Now Report	🔽 Can Read 🔽 Can Write 🔽	Can Delete
CIA Result	🔽 Can Read 🔽 Can Write 🔽	Can Delete
Confidentiality Form	🗹 Can Read 🔽 Can Write 🔽	Can Delete

OCTOBER 2022	
Cond Vectoration Record Update: Alexander Aboott.doc: Alexand	0 ⁹ joshua.kramer

Adding URL's Within Messages

When composing a message within Beyond, you have the ability to add URL's within the message.

Compose Message		
* Message Please contact <u>TempWorks</u> Support for assistance.		
https://www.tempworks.com/support/		
* Action Message		Ŧ
Linked Records		+
Create a task		
Upload New Document		
Attach Existing Document		
SAVE AS DRAFT	CANCEL	SUBMIT

After submitting the message, expand the message within the record type's list and the URL will be able to be selected:

AY	
Message Apr 14th, 8:37 AM - Joshua kramer Please contact TempWorks Support for assistance. <u>https://www.tempworks.com/support/</u> (2)	Ŧ ^
Abbot; Desmond	

Selecting the URL within the message will navigate the user to the URL's destination.

Copying Message Text

Within Beyond, you have the ability to copy the text within a message which can be beneficial for the following:

- Reuse the text in a new message
- Email the same information to another record
- Utilize a screen reader

Navigate to a message on a record that will need to have the text copied:

WSIFILE DETAILS V DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAYSETUP V ONBOARDING PAYHISTORY V CUSTOM DATA WIRIPAGE EMPLOYEE EXISTING PAGE DATAFRENZY EMPLOYEE PAGE POST FF PAGE		t≡
✓ Snapshot		
✓ Note		0
✓ Contact Information		•
∧ Messages		•
TODAY		
Bessage - Jul 26th, 11:55 AM Plasse contact Templiford Support for assistance - https://www.templworks.com/support/	joshua.kramer	:
JULY 2022		
Ist Interview w/ client . Jul 12th, 944.AM Test	lvelina Toshkova	:
JUNE 2022		
 Interview Prep Jun 7th, 701 AM Message 	lvelina Toshkova	:
MAY 2022		
V Restage - May 31st, 6-48 AM	lvelina Toshkova	:
GO TO MESSAGES PAGE		

Click and highlight the text within the message:

VISIFILE DETAILS 🗸 I	DOCUMENTS MESSAGES	JOB MATCHING	ASSIGNMENTS	STORY REFER	ENCES PAY SETUP 🗸	ONBOARDING	PAY HISTORY 🗸	CUSTOM DATA	WIKI PAGE	EMPLOYEE EXISTING PAGE	DATAFRENZY EMPLOYEE PAGE	POST FF PAGE	1
✓ Snapshot													
~ Note													
 Contact Information 													•
^ Messages													•
TODAY													
V S Message Please cont	- Jul 26th, 11:58 AM tact TempWorks Support for	r assistance - https:/	//www.tempworks.c	:om/support/								joshua.	oramer 🚦

Right-click the highlighted text and select "Copy":

VISIFILE DETAILS V DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAYSETUP V ONBOARDING PAYHISTORY V CUSTOM DATA WINI PAGE EMPLOYEE EXISTING PAGE DATAFRENZY EMPLOYEE PAGE		t≡
✓ Snapshot		
✓ Note		0
✓ Contact Information		Ð
∧ Messages		•
TODAY V V Message JU 200, 1159 AM Please context TempWorks Separat for existence - a Second With Bing	joshua.kramer	:
JULY 2022 V Q Ist Interview w/ client: Jul 12/0, 944 AM ✓ Hide menu ✓ Hide menu ✓ More actions	lvelina Toshkova	:

Note Message text is able to be copied from any message, from any record type within Beyond.

Logging Messages from Search Results

Messages can be logged from Employee, Contact, Assignment, and Job Order search results within Beyond.

Logging Messages from Employee Search Results

Begin by navigating to an Employee search within Beyond, searching for the Employees that you would like to log messages for:

Search	Search / Employees										
			BASIC					AE	DVANCED		
Last Nar Baker	ne		First Firs	Name t		Employee Id			Government Id		
Assigne Either	d		✓ State	is ve		✓ All			Service Representative		Ŧ
										RESET	SEARCH
Search	returned 26 resu	ilts									⊻
	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
	4295079958	Baker	Beth	Minneapolis	~	~		55123			
	4295014412	Baker	Brett	Minneapolis	\checkmark	\checkmark	Placed	55121			
	4295081541	Baker	Caleb	Eagan	\checkmark	\checkmark	ACA Exchange Notific.	36606		7638765432	987654346
	4295094616	Baker	Emmalee	St.Paul	\checkmark				\checkmark		
	4295026938	Baker	Jeff	Minneapolis	\checkmark	\checkmark	React (in town)	55102			
	4295094391	Baker	Jessica	Minneapolis	~			55121-2272		6120001100	
	4295080463	Baker	Joe	Minneapolis	~			54702			

Highlight the group of Employees that are to have messages logged:

Search	Search / Employees												
			BA	SIC			ADVANCED						
Last Nar Baker	ne			First Name First			Employee Id			Government Id			
Assigner Either	I		Ŧ	Status Active		Ţ	Branch All		Ŧ	Service Representative All		~	
											RESET	SEARCH	
Search 5 sele	returned 26 resul	ts Clear Selection										4	
	Employee Id	Last Name	First N	ame	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone	
	4295079958	Baker	Beth		Minneapolis	\checkmark	\checkmark		55123				
	4295014412	Baker	Brett		Minneapolis	~	~	Placed	55121				
	4295081541	Baker	Caleb		Eagan	~	~	ACA Exchange Notific	36606		7638765432	987654346	
	4295094616	Baker	Emma	lee	St.Paul	\checkmark				\checkmark			
	4295026938	Baker	Jeff		Minneapolis	\checkmark	\checkmark	React (in town)	55102				
	4295094391	Baker	Jessica		Minneapolis	~			55121-2272		6120001100		
	4295080463	Baker	Joe		Minneapolis	\checkmark			54702				

Either Right-Click or select the dropdown menu next to the "# selected employees", select the "Log Message for # Recipients" and select the option that best suits the message being logged. These options include:

- Available
- Left Message to Call
- Reactivate
- Deactivate
- Compose Other...

Note For more information on logging messages to Deactivate and Reactivate Employee records in Beyond, please see the following Knowledge Base article titled "Beyond - How to Deactivate and Reactivate Employee Records"

Search / Employees										
	BA	SIC					ADV	ANCED		
Las Ba	st Name aker	First Name First			Employee Id			Government Id		
As: Eit	Assigned Status Branch Either • Active • All			Ŧ	Service Representative		Ŧ			
									RESET	SEARCH
Search returned 26 results Selected employees Clear Selection										⊎
Ŀ	Email 2 Recipients	ame Branch	_	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
	Log Message for 5 Recipients	Message Action	is	~	~		55123			
Г	Make Candidates	Available		./		Placed	66101			
	Make Job Offers	Left Message To Call	15	•	Ť	Flaced	55121			
L	Assign	Reactivate		~	~	ACA Exchange Notific	36606		7638765432	987654346
	A Merge Record Select up to 2 records to merge	Deactivate		\checkmark				\checkmark		
	Onboarding	Compose other	is	~	~	React (in town)	55102			
	Assign a New Workflow Assign a pre-configured workflow and optionally set the starting	Minneap	olis	~			55121-2272		6120001100	
	step or additional pages.	Minneap	olis	\checkmark			54702			
,	Assign a manually-specified set of pages that are separate from existing workflows.	Minneap	olis	~		React	54702			

For any option other than "Compose Other...", simply select the option for the message to log on all the selected Employee records. You will see a confirmation of the messages being logged at the bottom of the screen depending on the Action chosen.

React

54702

4295080467

For the "Compose Other..." option, within the "Compose Message" window, enter the contents of the message, select an "Action" from the dropdown (defaults to Message) and once complete, select "Submit" for the messages to be logged on the respective Employee records:

Compose Message	
* Message This is a test message for Employees.	
* Action	
Message	.
Linked Records	× +
Create a task	
SAVE AS DRAFT	CANCEL SUBMIT

Note Please keep in mind that the larger the amount of Employees selected, the longer it may take for the Employees to load within the "Compose Message" window.

Note When logging messages for more than one employee at a time, you are unable to upload/attach

Logging Messages from Contact, Assignment, & Job Order Search Results

Begin by navigating to a Contact, Assignment, or Job Order search within Beyond, searching for those that you would like to log messages for:

Search	Search Contacts											
			BASIC					ADV	ANCED			
Last Name First Name C A					Contact Id	Contact Id Status Active				*		
Customer Id			Customer Na	Customer Name			Branch All			Service Representative All		
										RESET	SEARCH	
Search	returned 181 resul	ts									Ŀ	
	Contact Id	Last Name	First Name	Customer	Department	Title	Active	Status	Email Address	Office Phone	Branch	
	16219	A;varez	Bob	Tires R Us	Primary		~	A		7756872020	Minneap	
	12108	Aaron	Hank	ABC Auto Supply	Human Resources	Director of HR	~	A	haaron@abcauto.com	6515553456	Memphis	
	11437	Aaronson	Aaron	1A Awesome Animals	Primary	Owner	\checkmark	A	aaron@example.com	6512226666	New Brig	
	11441	Aaronson	Suzy	1A Awesome Animals	Primary	Floor Manager	\checkmark	A	suzy@example.com	6512227777	New Brig	
	9377	Abbot	Mike	Craig's ships	Sales	VP of Sales	\checkmark	A		814-868-9632	Minneap	
	10027	Abbott	Hannah	Ministry of Magic	Human Resources	Director of HR	\checkmark	A			Minneap	
	12749	Aberg	Jimmy	Kings Crown Makers	Primary		\checkmark	A			Minneap	

Highlight the group of Contacts, Assignments, or Job Orders that are to have messages logged:

Search	/ Contacts											
			BASIC					ADV.	ANCED			
Last Nar	ne		First Name			Contact Id	Contact Id Status Active					
Customer Id			Customer Name	Customer Name			Branch All			Service Representative All		
										RESET	SEARCH	
Search	ected contacts V Cl	s ear Selection									Ŀ	
	Contact Id	Last Name	First Name	Customer	Department	Title	Active	Status	Email Address	Office Phone	Branch	
	16219	A;varez	Bob	Tires R Us	Primary		~	A		7756872020	Minneap	
	12108	Aaron	Hank	ABC Auto Supply	Human Resources	Director of HR	~	A	haaron@abcauto.com	6515553456	Memphis	
	11437	Aaronson	Aaron	1A Awesome Animals	Primary	Owner	\checkmark	A	aaron@example.com	6512226666	New Brig	
	11441	Aaronson	Suzy	1A Awesome Animals	Primary	Floor Manager	~	A	suzy@example.com	6512227777	New Brig	
	9377	Abbot	Mike	Craig's ships	Sales	VP of Sales	\checkmark	A		814-868-9632	Minneap	
	10027	Abbott	Hannah	Ministry of Magic	Human Resources	Director of HR	\checkmark	A			Minneap	
	12749	Aberg	Jimmy	Kings Crown Makers	Primary		\checkmark	A			Minneap	

Either Right-Click or select the dropdown menu next to the "# selected items", select the "Log Message for # items" and select the option "Compose Other...":

Search	Search / Contacts												
			BA	SIC			ADVANCED						
Last Name First Name A					Contact Id			Status Active		*			
Customer Id Customer Name				9		Branch All		v	Service Representative		Ŧ		
											RESET	SEARCH	
Search	Search returned 181 results Selected contacts Clear Selection											4	
\geq	Email 3 Recipients		First N	ame	Customer	Department	Title	Active	Status	Email Address	Office Phone	Branch	
	Log Message for 5	Recipients >	Compose other		Tires R Us	Primary		~	A		7756872020	Minneap	
	12108	Aaron	Hank		ABC Auto Supply	Human Resources	Director of HR	~	A	haaron@abcauto.com	6515553456	Memphi	
	11437	Aaronson	Aaron		1A Awesome Animals	Primary	Owner	~	A	aaron@example.com	6512226666	New Brig	
	11441	Aaronson	Suzy		1A Awesome Animals	Primary	Floor Manager	~	A	suzy@example.com	6512227777	New Brig	
	9377	Abbot	Mike		Craig's ships	Sales	VP of Sales	\checkmark	A		814-868-9632	Minneap	
	10027	Abbott	Hanna	ıh	Ministry of Magic	Human Resources	Director of HR	\checkmark	A			Minneap	

Within the "Compose Message" window, enter the contents of the message, select an "Action" from the dropdown (defaults to Message) and once complete, select "Submit" for the messages to be logged on the respective Contact, Assignment, or Job Order records:

Compose Message	
* Message This is a test message for Contacts.	
* Action	
Message	~
Linked Records Ronald Acuna, Braves World Series Bound 🛞 🦪 Sandler Adam, Craig's ships 🛞 🛃 Ben Adams, US Bank 😒	× +
Create a task	
SAVE AS DRAFT	CANCEL SUBMIT

Note Please keep in mind that the larger the number of Contacts, Assignments, or Job Orders selected, the longer it may take for the recipients to load within the "Compose Message" window.

Note When logging messages for more than one Contact at a time, you are unable to upload/attach documents to the messages.

How to Edit Messages in Beyond

As long as the user has the required permission, messages are able to be edited in Beyond, including the ability to complete tasks directly within a message.

Note If you utilize standard Security Groups, the "Can edit saved messages" permission will need to be added to your intended Security Groups in order to access this functionality: Q message \times Can edit saved messages Allows a user to edit text and links on a message. This permission is not linked to any default Security Groups. If you utilize Security Groups with Advanced Permissions, you will need to add the Access to the "Compose Message" form within Global > Compose Message along with the Read & Write access to the "Action" and "Message" fields to the Security Groups that require the functionality: BY FIELD BY PAGE Selecting a parent selects children 🗸 Q message \times Global Compose Message Form Access Action Field Read Vrite Message Field Vrite Read For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "Beyond - Creating Security Groups with Advanced Permissions". Begin by navigating to the record that needs a message to be edited: VISIFILE DETAILS 🗸 DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAY SETUP 🗸 ONBOARDING PAY HISTORY 🗸 CUSTOM DATA EMPLOYEE EXISTING PAGE tΞ

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✓ Snapshot		
∽ Note		0
 Contact Information 		Ð
 Messages 		Ð
TODAY		
Message - Jul 26th, 12:24 PM This is a test message.	joshua.kramer	:

Select the *icon to the right of the message and select "Edit" to open the "Edit Message" window:*

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TODAY		
✓ O Message : Jul 26th, 12:24 PM This is a test message.	joshua.kramer	
SEPTEMBER 2016	Щ. Р	Pin
Message Sep 13th, 3:17 PM	Dominic.Re	Edit

Within the "Edit Message" window, you have the ability to do the following:

- Edit the text of the message.
- Change the Action of the message.
- Add/Remove additional linked entities on the message.
- Upload new or attach existing documents to the message.

Note When accessing a message via a linked entity, that linked entity is unable to be removed due to it being the "Primary" record.

For example, the following message is being accessed via the Jimmy Alaska contact record and has an additional linked entity of 123 Nursing. As can be seen, Jimmy Alaska is unable to be removed as a linked entity due to Jimmy being the "Primary" record the message was logged on:

 Messages 			Ð
TODAY			
Message - Mar 22nd, 11:09 AM Need to contact the main branch of 123 Nursing for further information.	joshua.	.kramer	:
123 Nursing 🦼 Alaska, jimmy (123 Nursing)			
Edit Message			
* Message			
Need to contact the main branch of 123 Nursing for further information.			
			-
* Action			
Message Carnot Unlink Primary Record		Ŧ	_
Linked Records			
123 Nursing 🛞 🔄 Alaska, Jimmy (123 Nursing)		+	
			-
Create a task			
9			
Upload New Document			
Attach Existing Document			
SAVE AS DRAFT	ANCEL	SUBM	IT

• Mark tasks as complete or incomplete that are attached to the message

Note You will only have the ability to mark tasks as complete or incomplete if you are the user who assigned the tasks.

Once the information within the message has been updated, select "Submit" to save the changes:

Edit Message	
* Message This is a test message for Cindy Adams.	
* Action Message	Ŧ
Linked Records Cindy Adams	+
This is a test task that needs to be completed. Due Date Today at 12:00 AM Completion Date 07/26/2022	
SAVE AS DRAFT	CANCEL SUBMIT

Note Messages cannot be deleted once saved or edited.

Searching by Message

There are a lot of advanced search options you can utilize to search for records by message.

 ≡ >	message	A
	Field	Category
+ RULE	Message Action	Profile
SAVE	Message Date	Profile
	Message Text	Profile
	Last Message Date	Profile

Here are a few examples of searches we like to run:

Searching for Available Employees -

Search / Employee / Advanced				
	BASIC			
E Click to select a saved search				
NOT AND OR				
Is Active	X 👻 IS TRUE 👻 Show in results			
Is Assigned	X - IS FALSE - Show in results			
│	X - EQUALS - Available X -			
│	X → IS BETWEEN → 1/1/2020 X AND 1/10/2020	×		
+ RULE / GROUP				
SAVE	=			

Prospect Customers without a Proposal That We Have Not Called Yet This Year(2020) -

Search / Customer / Advanced				
	BASIC			
☐ Click to select a saved search				
Active	X - IS TRUE - Show in results			
Include Departments	X - IS FALSE - Show in results			
Pipeline Status	X - MATCHES NONE - Proposal Sent X Proposal accepted X	X The Show in results		
Message Date	× - IS BEFORE - 1/1/2020	×		
+ RULE / GROUP				
SAVE		=		

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