

Beyond - Fields that Sync with Sense

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Once the setup for Sense has been completed, information from Beyond will automatically sync to Sense for texting and engage automation. The following record types are synced to Sense:

- [Employee](#)
- [Customer](#)
- [Contact](#)
- [Job Order](#)
- [Assignment](#)
- [Order Candidates](#)
- [Service Reps](#)
- [Employee Required Documents](#)
- [Custom Data](#)

Within those record types are individual fields that are synced to Sense from Beyond as well. This article contains a comprehensive list of all the fields within Beyond that sync with Sense along with additional setup steps as needed.

Note This integration does require additional setup and an existing relationship with Sense. For more information about getting this setup, and pricing inquiries, please contact your TempWorks Account Manager.

Note The following field correlations can be used to create Journeys within the Sense Web Application. For more information on how to setup Journeys, please see the following Sense Knowledge Base article [here](#).

Employee

Employees in Beyond correlate to Candidates in Sense.

Sense Field Name	Beyond Field Location/Name
Active	Employee > Active
Email	Employee > Contact Information > Email
First_Name	Employee > First Name
Last_Name	Employee > Last Name
ID	Employee > Snapshot > ID
Internal_User_ID	Employee > Details > Staffing Specialist

Sense Field Name	Beyond Field Location/Name
Mobile_Phone	Employee > Contact Method > Cell Phone
Address1	Employee > Details > Address 1
Address2	Employee > Details > Address 2
Categories	Employee > Details > Interest Codes > Category
Skills	Employee > Details > Interest Codes > Interest Code
City	Employee > City
Country	Employee > Country
Date_Added	The date the Employee was created.
Date_Last_Modified	The date the Employee was last modified.
Date_of_Birth	Employee > Details > EEO > Date of Birth
Home_Phone	Employee > Contact Method > Home Phone
Nick_Name	Employee > Details > Personal > Nickname
Office	Employee > Details > Personal > Branch
State	Employee > State
Status	Employee > Status
Zipcode	Employee > Zip Code
Source	Employee > Details > How Heard Of > Where
Title	Employee > Details > Hiring > Job Title
Custom_Date5	Employee > Details > Hiring > Activation Date
Custom_Date6	Employee > Details > Hiring > Deactivation Date
Custom_Text6	Employee > Details > Hiring > Washed Status
Custom_Boolean15	Employee > Search > Assigned Filter
Custom_Text5	Employee > Charm Menu > Web User > View Account Details > Web User Details > Username
Date_Last_Activity	The last Email or SMS message that was created in Sense and logged on the Employee record in Beyond.

Customer

Customers in Beyond correlate to Companies in Sense.

Sense Field Name	Beyond Field Location/Name
Address1	Customer > Street 1
Address2	Customer > Street 2
City	Customer > City

Sense Field Name	Beyond Field Location/Name
Company_Name	Customer > Customer Name
Country	Customer > Addresses > Country
Date_Added	Customer > Details > Customer Information > Activation Date
Department	Customer > Department (or Primary)
ID	Customer > Customer ID
Internal_User_ID	The Service Rep who created the Customer record.
Phone	Customer > Contact Information > Phone
State	Customer > State
URL	Customer > Details > Customer Information > Website
Zipcode	Customer > Zip Code
Status	Customer > Visifile > Snapshot > Status
Client_Contact_ID	Customer > Visifile > Contacts > ID Only the most recent, Active Contact record will sync with Sense.

Contact

Contacts in Beyond correlate to Client Contacts in Sense.

Sense Field Name	Beyond Field Location/Name
Company_ID	Contact > Visifile > Snapshot > Customer
Active	Contact > Active
Address1	Contact > Details > Address > Address 1
Address2	Contact > Details > Address > Address 2
City	Contact > Details > Address > City
Country	Contact > Details > Address > Country
Date_Added	Date the Contact record was created.
Date_Last_Modified	Date the Contact record information was last modified.
Email	Contact > Visifile > Contact Information > Email
First_Name	Contact > First Name
Home_Phone	Contact > Visifile > Contact Information > Home Phone
ID	Contact > ID
Internal_User_ID	Service Rep that created the Contact record.
Last_Name	Contact > Last Name

Sense Field Name	Beyond Field Location/Name
Mobile_Phone	Contact > Visifile > Contact Information > Cell Phone
Nick_Name	Contact > Details > Personal > Nickname
Source	Contact > Details > Other Information > How Heard Of
State	Contact > Details > Address > State
Status	Contact > Visifile > Snapshot > Status
Title	Contact > Visifile > Snapshot > Title
Work_Phone	Contact > Visifile > Contact Information > Office Phone
Zipcode	Contact > Details > Address > Zip Code
Date_of_Birth	Contact > Details > Personal > Date of Birth

Job Order

Job Orders are the same between Beyond and Sense.

Sense Field Name	Beyond Field Location/Name
ID	Job Order > Snapshot > Job Order ID
Address1	Job Order > Details > Customer Information > Worksite > Street 1
Address2	Job Order > Details > Customer Information > Worksite > Street 2
Bill_Rate	Job Order > Visifile > Snapshot > Bill Rate
Categories	Job Order > Details > Interest Codes > Category
City	Job Order > Details > Customer Information > Worksite > City
Client_Contact_ID	Job Order > Details > Contact Roles > Contact ID (Supervisor Only)
Company_ID	Job Order > Details > Customer Information > Customer
Country	Job Order > Details > Customer Information > Worksite > Country
Zipcode	Job Order > Details > Customer Information > Worksite > Zip Code
Title	Job Order > Details > Job Information > Job Title
Status	Job Order > Details > Other Information > Status
State	Job Order > Details > Customer Information > Worksite > State
Shift	Job Order > Details > Job Information > Shift

Sense Field Name	Beyond Field Location/Name
Employment_Type	Job Order > Details > Job Information > Job Order Type
Date_Start	Job Order > Details > Job Information > Start Date
Date_Last_Modified	Date the Job Order was last modified.
Date_End	Job Order > Details > Job Information > Estimated End Date
Date_Added	Date the Job Order was created.
Pay_Rate	Job Order > Details > Financials > Pay Rate
Is_Public	Job Order > Details > Job Board Options > Publicly Visible
Custom_Text6	Job Order > Visifile > Snapshot > Branch
Custom_Text_Block5	Job Order > Details > Customer Information > Directions
Custom_Text_Block6	Job Order > Details > Job Information > Dress Code
Client_Contact2.ID	Job Order > Visifile > Contact Roles > Add Contact Role > Role > Report To

Assignment

Assignments in Beyond correlate to Placements in Sense.

Sense Field	Beyond Field Location/Name
Bill_Rate	Assignment > Snapshot > Bill Rate
Candidate_ID	Assignment > Snapshot > Employee ID
Client_Contact_ID	Job Order > Details > Contact Roles > Contact ID (Supervisor Only)
Company_ID	Customer > Customer ID
Date_Added	Assignment > Details > Job Information > Original Start Date
Date_End	Assignment > Details > Job Information > End Date
Date_Last_Modified	The most recent date the Assignment had information modified.
Date_Start	Assignment > Details > Job Information > Start Date
Employment_Type	Job Order > Details > Job Information > Job Order Type
ID	Assignment > Assignment ID
Internal_User_ID	The Service Rep who created the Assignment.
Job_Order_ID	Job Order > Job Order ID

Sense Field	Beyond Field Location/Name
Overtime_Bill_Rate	Assignment > Details > Financials > Overtime Bill Rate
Overtime_Pay_Rate	Assignment > Details > Financials > Overtime Pay Rate
Pay_Rate	Assignment > Details > Financials > Pay Rate
Salary	Assignment > Details > Financials > Salary Pay Rate
Shift	Assignment > Details > Job Information > Shift
Status	Assignment > Details > Status
Custom_Text6	Assignment > Visifile > Snapshot > Branch
Custom_Text5	Assignment > Details > Job Information > Start Time
Custom_Text4	Assignment > Details > Job Information > End Time

Order Candidates

Order Candidates in Beyond correlate to Submissions in Sense.

Sense Field	Beyond Field Location/Name
Candidate_ID	Employee > Visifile > Snapshot > ID
Client_Contact_ID	Job Order > Details > Contact Roles > ID (Role Supervisor)
Comments	Job Order > Candidates > Comments
Date_Added	Job Order > Candidates > Employee > Placed On
Date_Last_Modified	The date the Order record was last modified.
Date_Start	Job Order > Details > Job Information > Start Date
ID	The ID of the Order Candidate record.
Job_Order_ID	Job Order > Visifile > Snapshot > Job Order ID
Owner_ID	Beyond > Employee > Details > Hiring > Staffing Specialist
Sending_User_ID	The Service Rep ID of the individual who created the Order Candidate.
Source	Beyond > Employee > Details > How Heard Of > Where
Status	Job Order > Candidates > Status

Service Rep

Service Reps in Beyond correlate to Internal Users in Sense.

Sense Field	Beyond Field Location/Name
Active	System Settings > Service Representatives > Is Active
Email	System Settings > Service Representatives > Email
FirstName	System Settings > Service Representatives > First Name of the Full Name field
ID	ID of the Service Rep.
LastName	System Settings > Service Representatives > Last Name of the Full Name field.
MobilePhone	System Settings > Service Representatives > Phone
DateAdded	Date the Service Rep was created.

Employee Required Documents

Employee Required Documents in Beyond correlate to Certificates in Sense.

Candidate_ID	Employee > Visifile > Snapshot > ID
Comments	Employee > Documents > "+" > Required Document > Requirement Description
Date_Added	Employee > Documents > "+" > Required Document > Received Date
Date_Certified	Employee > Documents > "+" > Required Document > More Fields > Issued Date
Date_Expiration	Employee > Documents > "+" > Required Document > Requirement Expiration Date
ID	ID of the Required Document.
Issued_By	Employee > Documents > "+" > Required Document > Authority
License_Number	Employee > Documents > "+" > Required Document > More Fields > License Number
License_Type	Employee > Documents > "+" > Document Type
Name	Employee > Documents > "+" > Name
Placement_ID	ID of the Assignment.
Status	Employee > Documents > "+" > Required Document > More Fields > Document Status

Note Before Employee Required Document fields are able to be synced from Beyond to Sense, the Required Document Type must be "Active" and must be enabled to sync with Sense.

Navigate to B Menu > System Settings > Required Document Types > Edit > Sync to Sense:

The screenshot shows the 'Edit Required Document' form. The 'Requirement Type Name' is 'ASCP/Certificate'. The 'Assign to Category' dropdown is set to 'System'. The 'Hierarchy' is 'System'. The 'Days Warning Before Expire' is '14'. The 'Default Expiration Date' is set to 'In 365 Days After Document Upload'. The 'Description' field is empty. The 'Active' checkbox is checked, and the 'Sync To Sense' checkbox is also checked and highlighted with a red box. Below the checkboxes, a light blue box contains the text: 'Requirement types cannot be deleted, they can only be edited or deactivated.' Another light blue box below that contains the text: 'Information for documents attached to this Requirement Type will be synced to Sense.' This second box is also highlighted with a red box. At the bottom right, there are 'CANCEL' and 'UPDATE' buttons.

Once the checkbox is selected, the fields listed above will sync with Sense for all Employee Required Documents that are linked to that Required Document Type.


Please keep in mind the following to ensure the syncing of Employee Required Document information to Sense:

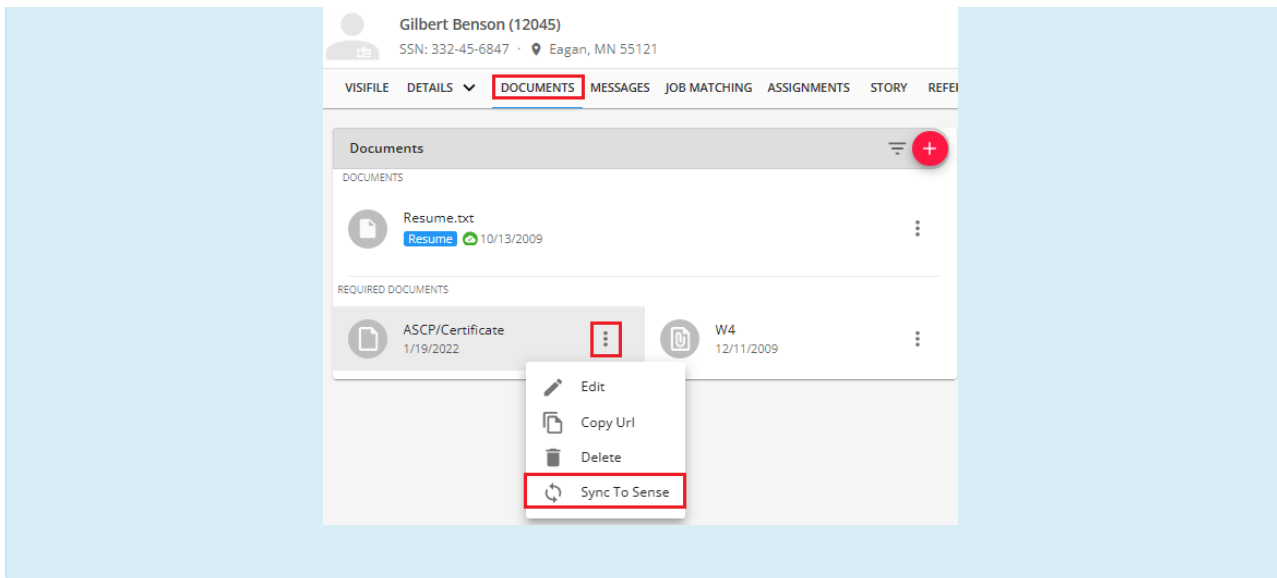
1. The Required Document Type must be "Active" and the "Sync to Sense" checkbox must be checked.
2. The Employee record must be "Active".
3. The Employee Required Document must be linked to the Required Document Type that has been setup to sync with Sense.

Note By deactivating the Required Document Type that was setup to sync with Sense, all Employee Required Documents linked to that type will no longer sync to Sense.

All prior synced information will remain on Sense related to the Employee Required Documents, but no updated information will sync to Sense while the Required Document Type is deactivated.

Note While the syncing of information does happen automatically throughout the day, users have the option to manually sync Employee Required Document information to Sense.

Navigate to the Employee > Documents > Required Documents > Select the  icon > Sync To Sense:



Custom Data

Custom Data fields within Beyond/Enterprise correlate to Custom Data Fields within Sense.

Note Before being able to map the Custom Data fields within Beyond to Sense, Custom Data fields need to be setup within Enterprise by following the instructions within the [Enterprise - How to Setup and Manage Custom Data](#) Knowledge Base article.

Once the Custom Data fields have been setup within Enterprise, they can be configured within Beyond by following the instructions within the [Beyond - Custom Data](#) Knowledge Base article.

Once the Custom Data fields have been setup and configured as intended within Enterprise, they are able to be setup to be mapped to Sense by navigating to the B Menu > System Settings > External Service > Texting > Sense:

Note Only users who have access to System Settings in Beyond will be able to access the Custom Data mappings to Sense.

Sense Data Mapping ?			
⚠ There is 1 mapped custom data field that has been deactivated in Enterprise. It will continue to be synced to Sense. DISMISS			
Select the Custom Field that corresponds to your Sense Field. Please allow 2 days for the sync to complete and changes to take effect.			
All Record Types ▼			
Sense Data Field	Tempworks Custom Data Field	Record Type	Description
custom_date1	OSP Date1	Assignment	43# ✎
custom_date1	OSP Date1	Customer	4etertertertertertertertertert ✎
custom_date1	QA: Order Date	Job Order	test ✎
custom_date1	OSP Date1	Contact	✎
custom_date1		Employee	✎
custom_date2	OSP Date2	Assignment	✎

Note This section will only appear if there is a current Custom Data field setup for an individual record type within your system.

Regarding the first column, Sense Data Fields, Sense allows for 6 TempWorks Custom Data fields to be mapped per Sense Data Field type.

For example, Sense has the following Data Field types:

- Custom_Date
- Custom_Float
- Custom_Integer
- Custom_Text_Block
- Custom_Text

For each Sense Data Field type, there can be a total of 6 mapped TempWorks Custom Data Fields per record type (Employee, Customer, Contact, Job Order, Assignment).

Note Only TempWorks Custom Data fields that match the Sense Data Field type are able to be mapped accordingly.


For example, a TempWorks Custom Data field that contains a date, cannot be mapped to a Sense Data Field of "Custom_Float", as "Custom_Float" does not represent a date. Instead, this will need to be mapped to a Sense Data Field of "Custom_Date".

Fortunately, when selecting the TempWorks Custom Data Field dropdown, only those fields that match the Sense Data Field type are able to be selected:

Also note that once a TempWorks Custom Data field has been mapped to a Sense Data Field, that TempWorks Custom Data field is not able to be mapped a second time.

Once you have selected the mapping between the Sense Data field and TempWorks Custom Data field, select "Save":

Sense Data Mapping ⓘ

 There is 1 mapped custom data field that has been deactivated in Enterprise. It will continue to be synced to Sense. DISMISS

Select the Custom Field that corresponds to your Sense Field. Please allow **2 days** for the sync to complete and changes to take effect.

Employee ▼


Sense Data Field	Tempworks Custom Data Field	Record Type	Description
custom_date1	yavor property 2 ▼	Employee	

SAVE
CANCEL


Continue this process for each line within the chart that you would like to map.

Note Only one line can be edited at a time within the chart.

Once all of the mappings are complete, the Custom Data fields will appear within the Sense portal.




Note In the event Custom Data fields are deactivated within Enterprise, if they are still mapped within the table, they will continue to sync with Sense. These fields are indicated by the  icon next to the TempWorks Custom Data Field column:

Sense Data Mapping ⓘ

 There is 1 mapped custom data field that has been deactivated in Enterprise. It will continue to be synced to Sense. DISMISS

Select the Custom Field that corresponds to your Sense Field. Please allow **2 days** for the sync to complete and changes to take effect.

Employee ▼

Sense Data Field	Tempworks Custom Data Field	Record Type	Description
custom_date1	yavor property 2	Employee	
custom_date2	 OSP Data2	Employee	

Related Articles