

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](#).

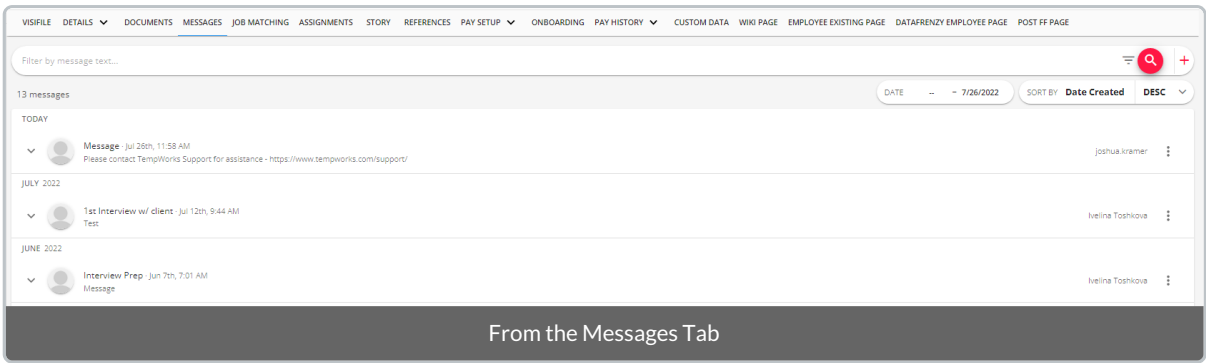
How to Log a Message in Beyond

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





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

 Alexander Abbott ✕ +

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

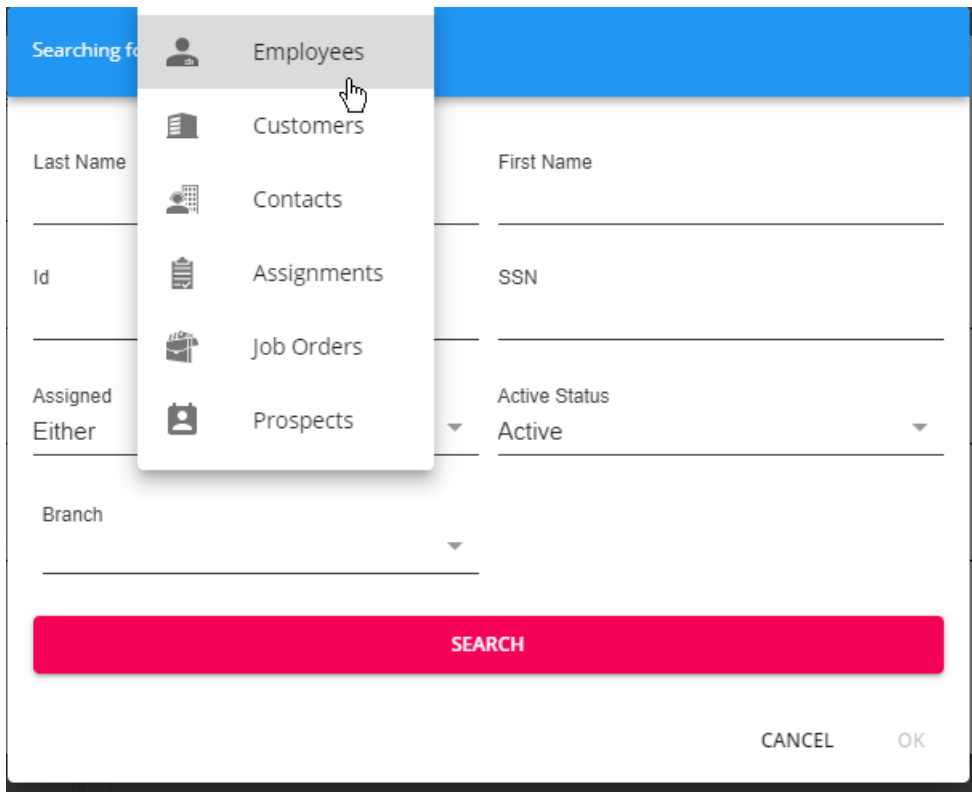


The screenshot shows a 'Compose Message' form with the following fields:

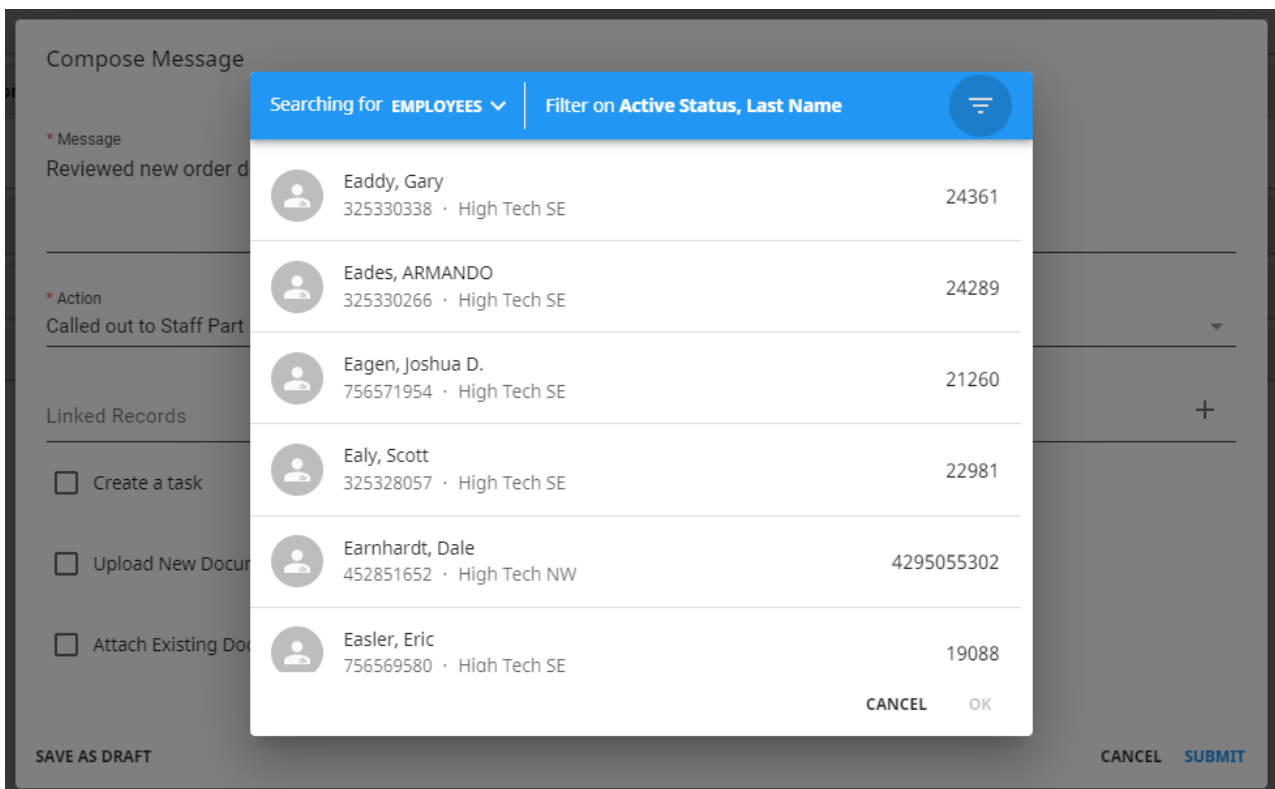
- * Message**: Reviewed new order details we received via email. Looking for 20 people in the next three weeks.
- * Action**: Called out to Staff Part
- Linked Records**: A section with a red box around a '+' icon, indicating where to click to link records.
- Create a task
- Upload New Document
- Attach Existing Document

At the bottom of the form, there are buttons for 'SAVE AS DRAFT', 'CANCEL', and 'SUBMIT'.

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



Select the record(s) you want to link:



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

Linked Records

Gary Eaddy × ARMANDO Eades × × +

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 × × +

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:

Compose Message

* Message
|

Compose your message
Message is required.

* Action
Message

Linked Records

123 Nursing - production

Create a task

Upload New Document

Attach Existing Document

SAVE AS DRAFT CANCEL SUBMIT

- 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 Records

Steve Aardson 123 Nursing - Primary 123 Nursing, 12 hour Nurse

Create a task

Upload New Document

Attach Existing Document

SAVE AS DRAFT CANCEL SUBMIT

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 records to this message once acquired.

* Action
Message

Linked Records

Alexzander Abbott X +

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 COVID vaccination records. Please attach the updated records to this message once acquired.

* Action

Message

Linked Records

 Alexander Abbott 

Create a task

Upload New Document



Drop file here or [click to select a file.](#)

Recommended .pdf, .doc, .txt

(Max 25MB)

0/5 Allowed Documents Attached

Attach Existing Document

SAVE AS DRAFT

CANCEL [SUBMIT](#)

Compose Message - Compose Message

1 Compose Message 2 Document Information 1/1 3 Summary

* Message
For work placement, the Alexzander requires updated COVID vaccination records. Please attach the updated records to this message once acquired.


* Action
Message

Linked Records

Alexander Abbott X +

Create a task



Upload New Document



Drop file here or [click to select a file.](#)

Recommended .pdf, .doc, .txt
(Max 25MB)

1/5 Allowed Documents Attached

 Covid Vaccination Record Update - Alexander Abbott.docx
67 KB 

Attach Existing 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 Alexander's updated resume to this message for the client.

* Action
Message

Linked Records

Alexander Abbott

Create a task

Upload New Document

Attach Existing Document

Select Document

Select from available documents

Updated Resume - Alexander Abbott.docx

Covid Vaccination Record Update - Alexander Abbott.docx

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

1 Compose Message 2 Document Information 1/1 3 Summary

Covid Vaccination Record Update - Alexander Abbott.docx
67 KB

* Document Name
Covid Vaccination Record Update - Alexander Abbott.docx

* Document Type
COVID Proof of Booster

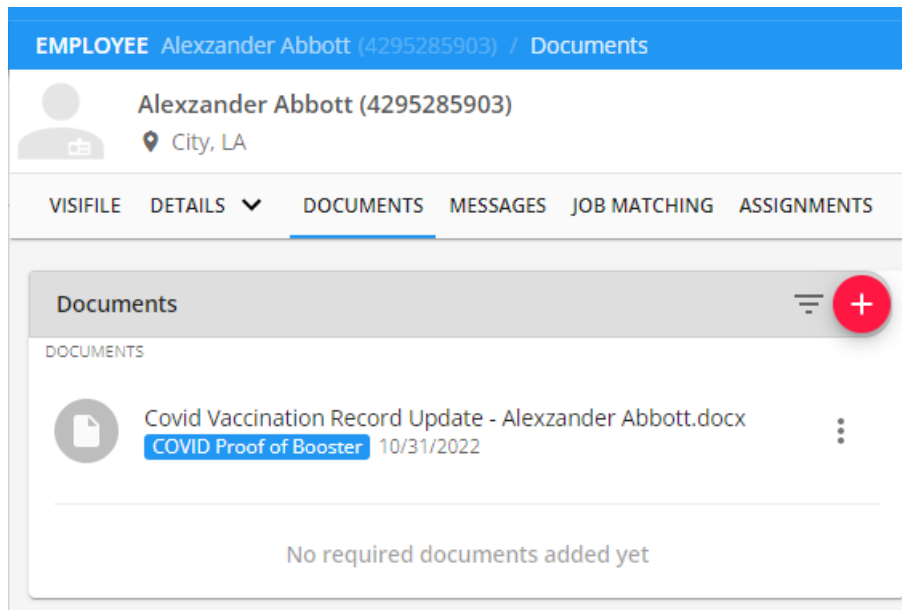
Description
COVID Vaccination Update

Expiration Date

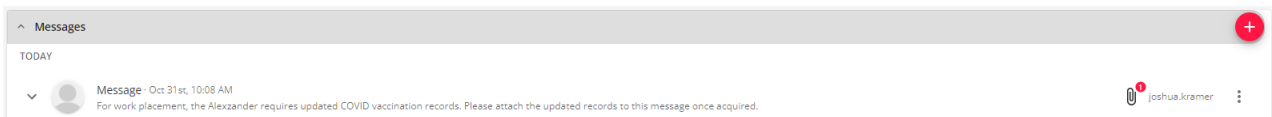
CANCEL < PREVIOUS NEXT >

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:



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:



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 Types Security Group

Document Type Access

System

* Description

Access for Document Types

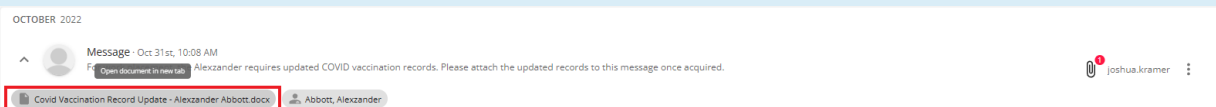
Permissions (55)

54 Can Read 54 Can Write 54 Can Delete

Filter...

Acknowledgement Form	<input checked="" type="checkbox"/> Can Read	<input checked="" type="checkbox"/> Can Write	<input checked="" type="checkbox"/> Can Delete
Applicant Portal Resume	<input checked="" type="checkbox"/> Can Read	<input checked="" type="checkbox"/> Can Write	<input checked="" type="checkbox"/> Can Delete
Assessment	<input checked="" type="checkbox"/> Can Read	<input checked="" type="checkbox"/> Can Write	<input checked="" type="checkbox"/> Can Delete
Background Check	<input checked="" type="checkbox"/> Can Read	<input checked="" type="checkbox"/> Can Write	<input checked="" type="checkbox"/> Can Delete
Care Now Report	<input checked="" type="checkbox"/> Can Read	<input checked="" type="checkbox"/> Can Write	<input checked="" type="checkbox"/> Can Delete
CIA Result	<input checked="" type="checkbox"/> Can Read	<input checked="" type="checkbox"/> Can Write	<input checked="" type="checkbox"/> Can Delete
Confidentiality Form	<input checked="" type="checkbox"/> Can Read	<input checked="" type="checkbox"/> Can Write	<input checked="" type="checkbox"/> Can Delete

So long as you have access, selecting the attached document will navigate you to the document in a new browser tab.



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 [TempWorks Support](https://www.tempworks.com/support/) for assistance.

<https://www.tempworks.com/support/>

* Action
Message

Linked Records +

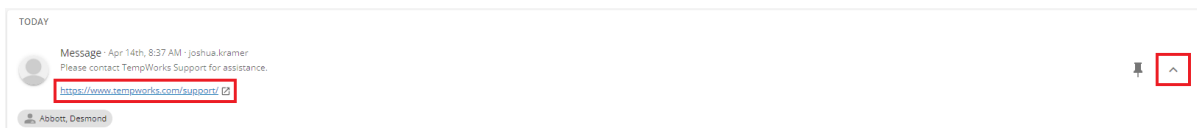
Create a task

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:



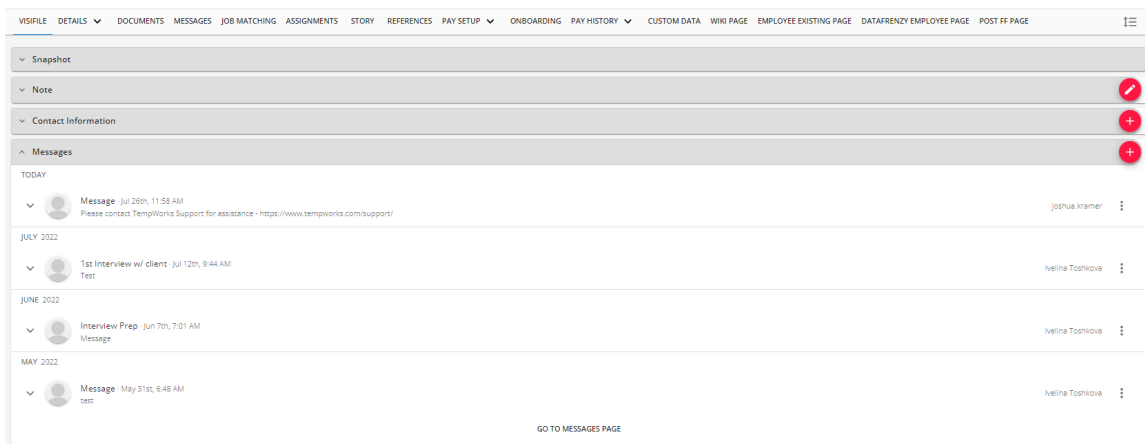
Selecting the URL within the message will navigate the user to the URL's destination.

Copying Message Text

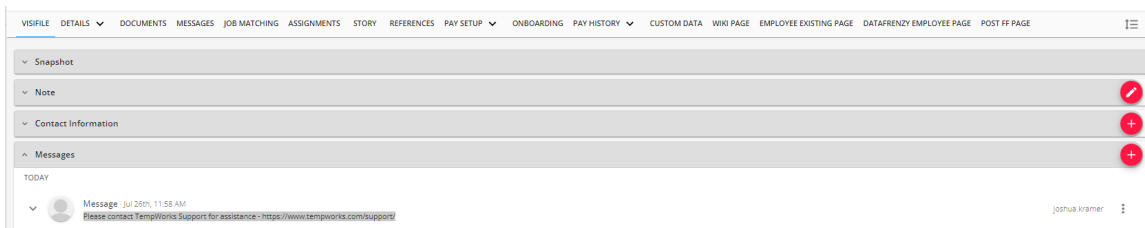
Within Beyond, you have the ability to copy the text within a message which can be beneficial for the following:

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

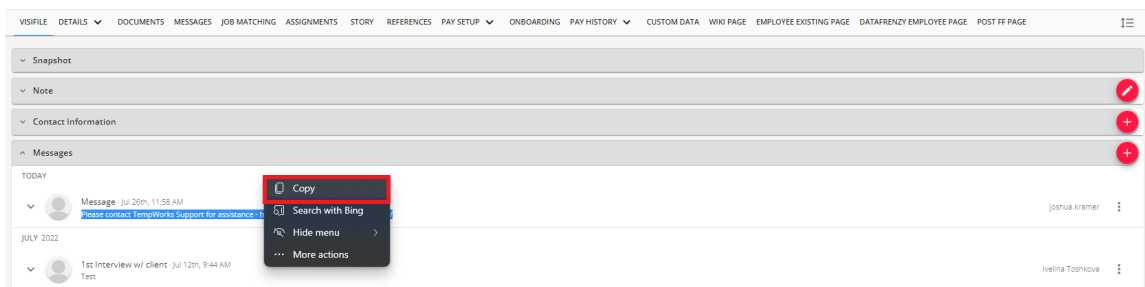
Navigate to a message on a record that will need to have the text copied:



Click and highlight the text within the message:



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



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 / Employees

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

RESET SEARCH

Search returned 26 results

<input type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
<input type="checkbox"/>	4295079958	Baker	Beth	Minneapolis	✓	✓		55123			
<input type="checkbox"/>	4295014412	Baker	Brett	Minneapolis	✓	✓	Placed	55121			
<input type="checkbox"/>	4295081541	Baker	Caleb	Eagan	✓	✓	ACA Exchange Notific...	36606		7638765432	98765434
<input type="checkbox"/>	4295094616	Baker	Emmalee	St.Paul	✓				✓		
<input type="checkbox"/>	4295026938	Baker	Jeff	Minneapolis	✓	✓	React (in town)	55102			
<input type="checkbox"/>	4295094391	Baker	Jessica	Minneapolis	✓			55121-2272		6120001100	
<input type="checkbox"/>	4295080463	Baker	Joe	Minneapolis	✓			54702			

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

Search / Employees

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

RESET SEARCH

Search returned 26 results

5 selected employees Clear Selection

<input type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
<input checked="" type="checkbox"/>	4295079958	Baker	Beth	Minneapolis	✓	✓		55123			
<input checked="" type="checkbox"/>	4295014412	Baker	Brett	Minneapolis	✓	✓	Placed	55121			
<input checked="" type="checkbox"/>	4295081541	Baker	Caleb	Eagan	✓	✓	ACA Exchange Notific...	36606		7638765432	98765434
<input checked="" type="checkbox"/>	4295094616	Baker	Emmalee	St.Paul	✓				✓		
<input checked="" type="checkbox"/>	4295026938	Baker	Jeff	Minneapolis	✓	✓	React (in town)	55102			
<input type="checkbox"/>	4295094391	Baker	Jessica	Minneapolis	✓			55121-2272		6120001100	
<input type="checkbox"/>	4295080463	Baker	Joe	Minneapolis	✓			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

BASIC ADVANCED

Last Name: Baker, First Name: First, Employee Id, Government Id

Assigned: Either, Status: Active, Branch: All, Service Representative: All

RESET SEARCH

Search returned 26 results

5 selected employees Clear Selection

Email 2 Recipients
 Log Message for 5 Recipients
 Make Candidates
 Make Job Offers
 Assign
 Merge Record
 Select up to 2 records to merge

Message Action
 Available
 Left Message To Call
 Reactivate
 Deactivate
 Compose other...

Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
		✓	✓		55123			
		✓	✓	Placed	55121			
		✓	✓	ACA Exchange Notific...	36606		7638765432	98765434
		✓				✓		
	Minneapolis	✓	✓	React (in town)	55102			
	Minneapolis	✓			55121-2272		6120001100	
	Minneapolis	✓			54702			
	Minneapolis	✓		React	54702			
<input type="checkbox"/>	4295080467 Baker Joe	Minneapolis	✓	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.

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

documents to the messages.

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 / Contacts

BASIC ADVANCED

Last Name: A First Name: Contact Id: Status: Active

Customer Id: Customer Name: Branch: All Service Representative: All

RESET SEARCH

Search returned 181 results

<input type="checkbox"/>	Contact Id	Last Name	First Name	Customer	Department	Title	Active	Status	Email Address	Office Phone	Branch
<input type="checkbox"/>	16219	Avarez	Bob	Tires R Us	Primary		✓	A		7756872020	Minneap
<input type="checkbox"/>	12108	Aaron	Hank	ABC Auto Supply	Human Resources	Director of HR	✓	A	haaron@abcauto.com	6515553456	Memphis
<input type="checkbox"/>	11437	Aaronson	Aaron	1A Awesome Animals	Primary	Owner	✓	A	aaron@example.com	6512226666	New Brig
<input type="checkbox"/>	11441	Aaronson	Suzy	1A Awesome Animals	Primary	Floor Manager	✓	A	suzy@example.com	6512227777	New Brig
<input type="checkbox"/>	9377	Abbot	Mike	Craig's ships	Sales	VP of Sales	✓	A		814-868-9632	Minneap
<input type="checkbox"/>	10027	Abbott	Hannah	Ministry of Magic	Human Resources	Director of HR	✓	A			Minneap
<input type="checkbox"/>	12749	Aberg	Jimmy	Kings Crown Makers	Primary		✓	A			Minneap

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

Search / Contacts

BASIC ADVANCED

Last Name: A First Name: Contact Id: Status: Active

Customer Id: Customer Name: Branch: All Service Representative: All

RESET SEARCH

Search returned 181 results

5 selected contacts Clear Selection

<input type="checkbox"/>	Contact Id	Last Name	First Name	Customer	Department	Title	Active	Status	Email Address	Office Phone	Branch
<input checked="" type="checkbox"/>	16219	Avarez	Bob	Tires R Us	Primary		✓	A		7756872020	Minneap
<input checked="" type="checkbox"/>	12108	Aaron	Hank	ABC Auto Supply	Human Resources	Director of HR	✓	A	haaron@abcauto.com	6515553456	Memphis
<input checked="" type="checkbox"/>	11437	Aaronson	Aaron	1A Awesome Animals	Primary	Owner	✓	A	aaron@example.com	6512226666	New Brig
<input checked="" type="checkbox"/>	11441	Aaronson	Suzy	1A Awesome Animals	Primary	Floor Manager	✓	A	suzy@example.com	6512227777	New Brig
<input checked="" type="checkbox"/>	9377	Abbot	Mike	Craig's ships	Sales	VP of Sales	✓	A		814-868-9632	Minneap
<input type="checkbox"/>	10027	Abbott	Hannah	Ministry of Magic	Human Resources	Director of HR	✓	A			Minneap
<input type="checkbox"/>	12749	Aberg	Jimmy	Kings Crown Makers	Primary		✓	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 / Contacts

BASIC			ADVANCED	
Last Name A	First Name	Contact Id	Status Active	
Customer Id	Customer Name	Branch All	Service Representative All	

RESET SEARCH

Search returned 181 results

5 selected contacts Clear Selection

Email 3 Recipients		First Name	Customer	Department	Title	Active	Status	Email Address	Office Phone	Branch
<input type="checkbox"/>	Log Message for 5 Recipients >	Compose other...	Tires R Us	Primary		✓	A		7756872020	Minneap
<input checked="" type="checkbox"/>	12108	Aaron Hank	ABC Auto Supply	Human Resources	Director of HR	✓	A	haaron@abcauto.com	6515553456	Memphis
<input checked="" type="checkbox"/>	11437	Aaronson Aaron	1A Awesome Animals	Primary	Owner	✓	A	aaron@example.com	6512226666	New Brig
<input checked="" type="checkbox"/>	11441	Aaronson Suzy	1A Awesome Animals	Primary	Floor Manager	✓	A	suzy@example.com	6512227777	New Brig
<input checked="" type="checkbox"/>	9377	Abbot Mike	Craig's ships	Sales	VP of Sales	✓	A		814-868-9632	Minneap
<input type="checkbox"/>	10027	Abbott Hannah	Ministry of Magic	Human Resources	Director of HR	✓	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
- John Acme, Acme Widget
- CHRIS ADAMS, HOME SHOP INC

Create a task

SAVE AS DRAFT CANCEL **SUBMIT**

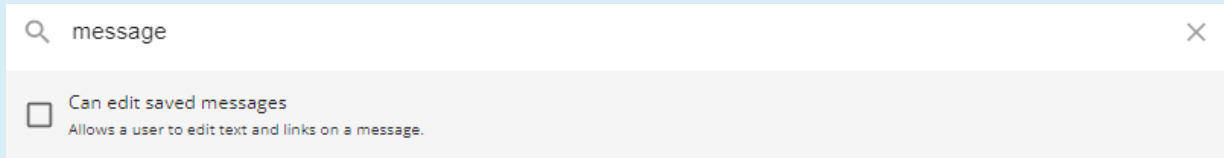
Note Please keep in mind that the larger the number of Contacts, Assignments, or Job Orders selected, the longer it may take for the recipients to load within the "Compose Message" window.

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

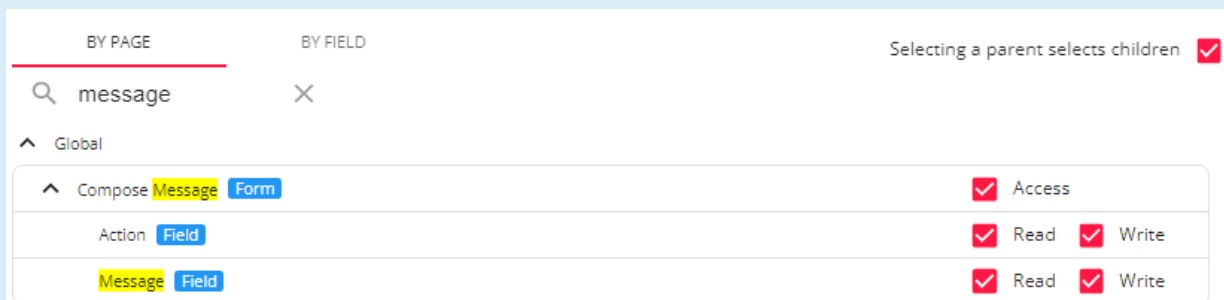
As long as the user has the required permission, messages are able to be edited in Beyond, including the ability to complete tasks directly within a message.

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:



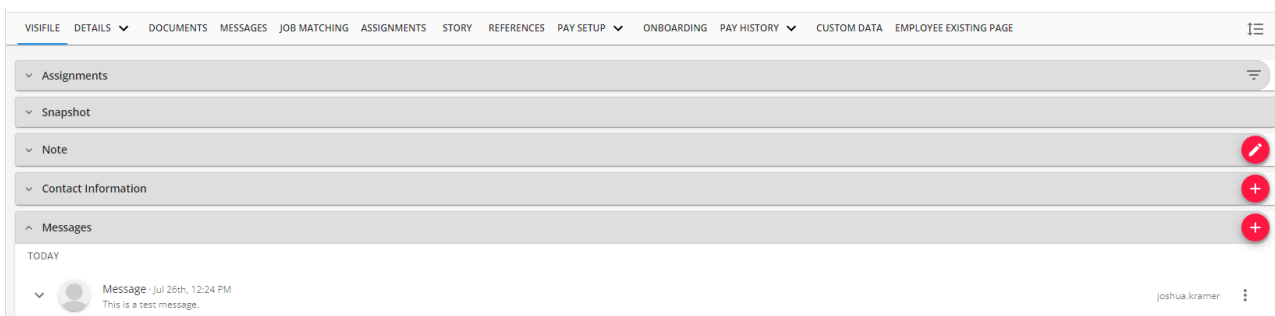
This permission is not linked to any default Security Groups.

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:

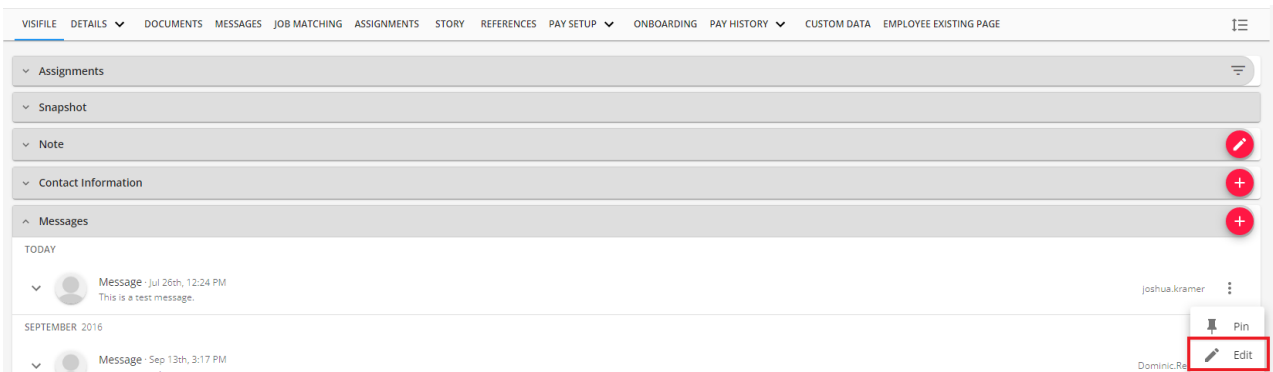


For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

Begin by navigating to the record that needs a message to be edited:



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

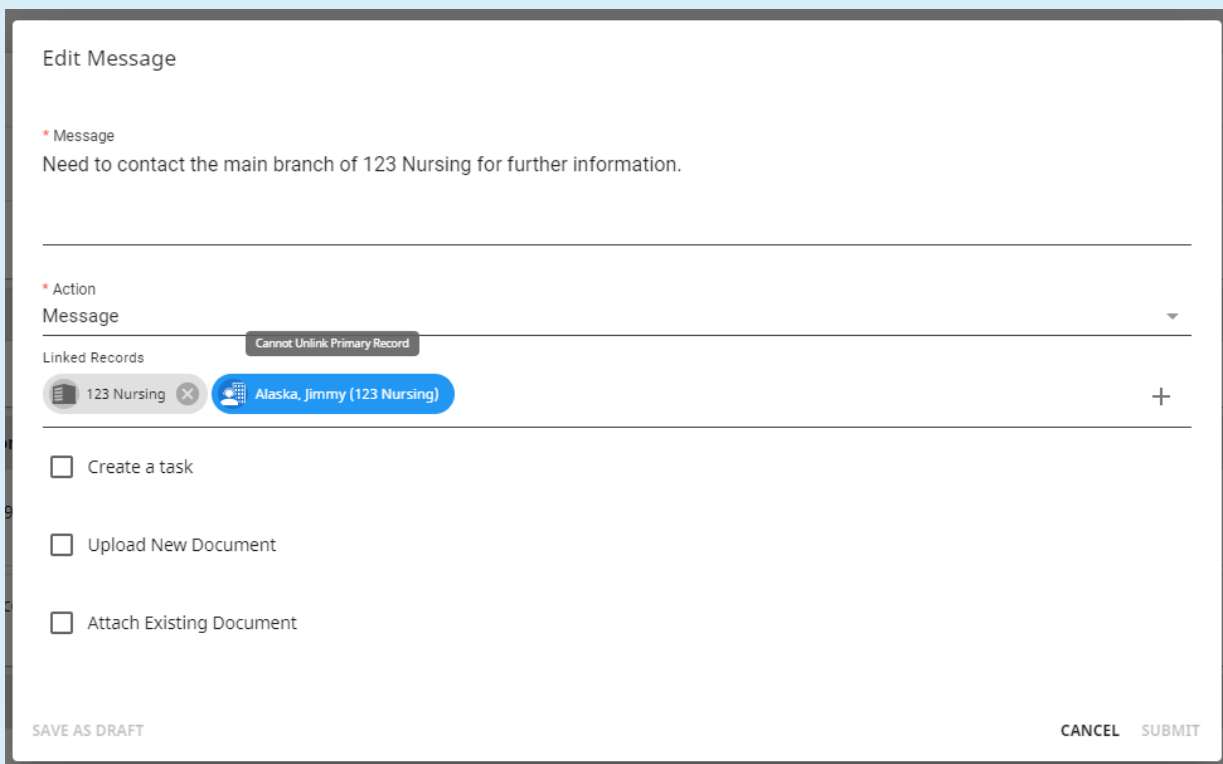
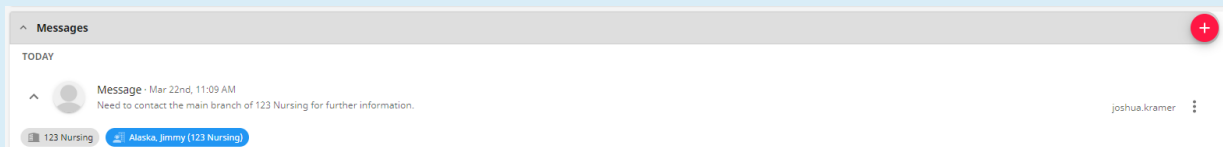


Within the "Edit Message" window, you have the ability to do the following:

- 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:



- 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

Linked Records

 Cindy Adams +

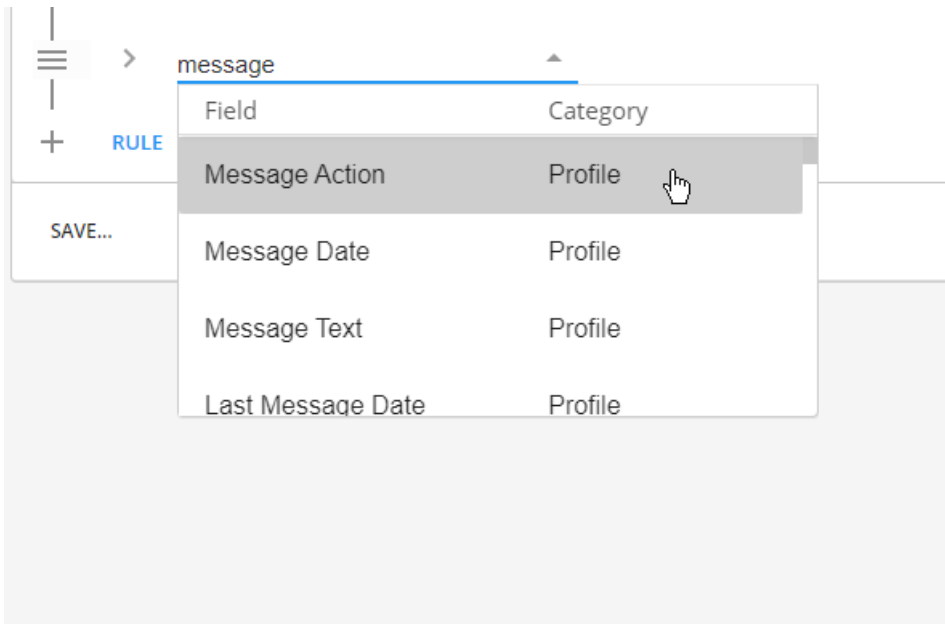
This is a test task that needs to be completed.
Due Date Today at 12:00 AM Completion Date 07/26/2022

SAVE AS DRAFT CANCEL **SUBMIT**

Note Messages cannot be deleted once saved or edited.

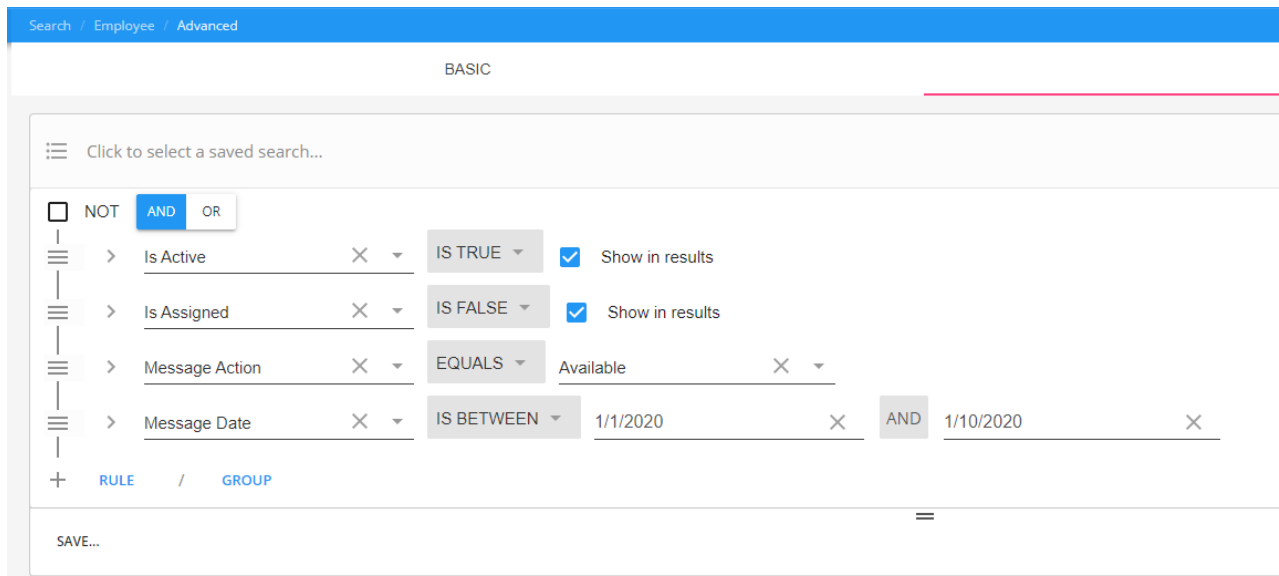
Searching by Message

There are a lot of [advanced search](#) options you can utilize to search for records by message.



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

Searching for Available Employees -



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

BASIC

☰ Click to select a saved search...

NOT **AND** OR

- > Active IS TRUE Show in results
- > Include Departments IS FALSE Show in results
- > Pipeline Status MATCHES NONE Show in results
 - Proposal Sent
 - Proposal accepted
- > Message Date IS BEFORE 1/1/2020

+ RULE / GROUP

SAVE...

Related Articles