

Beyond - Using Sense Integration

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How to Utilize Sense

With the credentials entered, the integration is ready to be utilized. The Sense integration is used via the following methods:

1. [Sense Chrome Extension](#)
2. [Sense Web App](#)
3. [Manually Syncing Records](#)

Note Please see the [Sense Knowledge Base](#) for further instruction on the other tools that the Sense integration supports.

Sense Chrome Extension

The Sense Chrome Extension can be used to parse record information in order to send individual and mass messages.

The following information is parsed from the webpage into Sense:

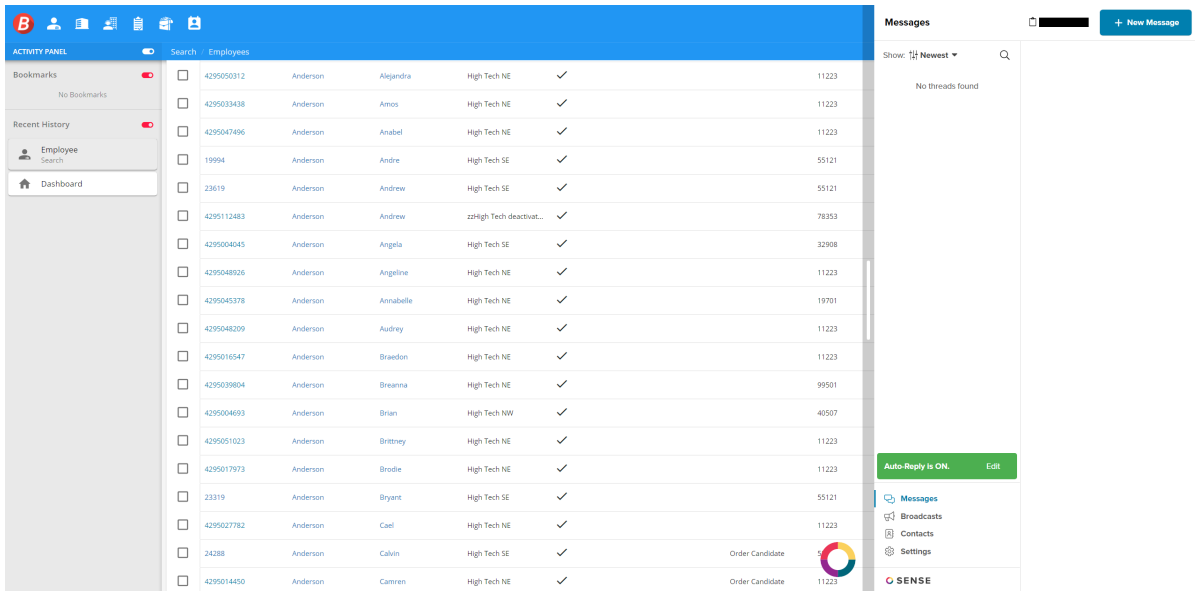
- Name
- Phone Number

For more information, including setup instructions for the extension, please see the [Extension Settings](#) article within Sense's Knowledge Base.

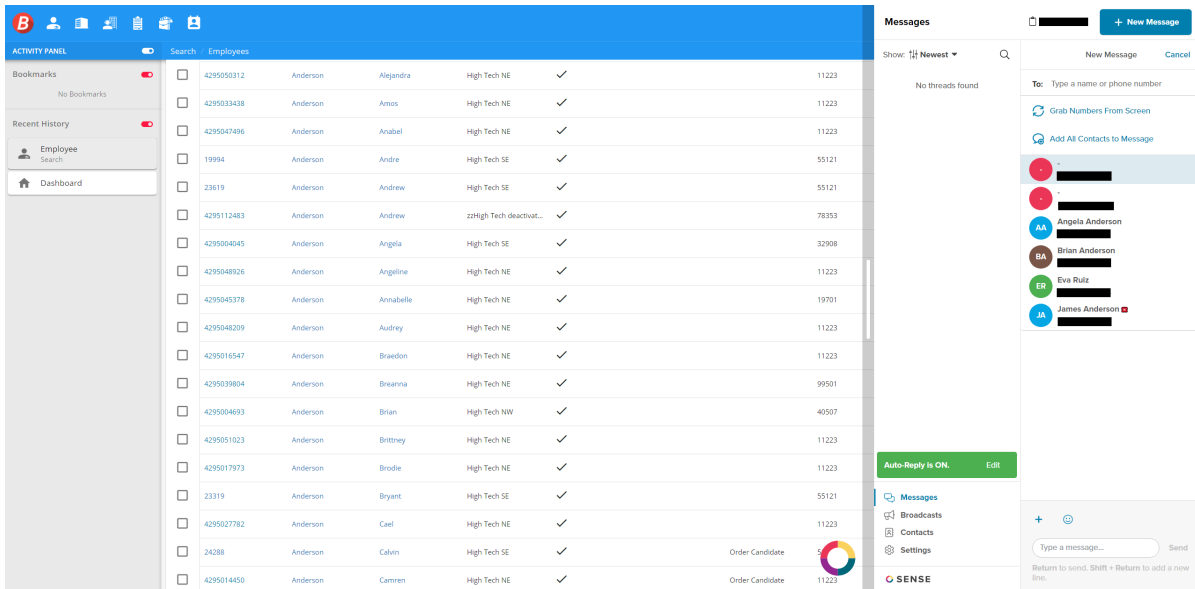
Note The web browser extension is currently only available within Google Chrome.

The following is an example process of sending a message from the Sense Chrome Extension:

1. Run a search for the record type you would like to send a text message to.
2. Once the search is complete, click on the Sense Extension icon at the bottom right of the page.
3. Upon clicking on the Sense icon, the extension sidebar will open:

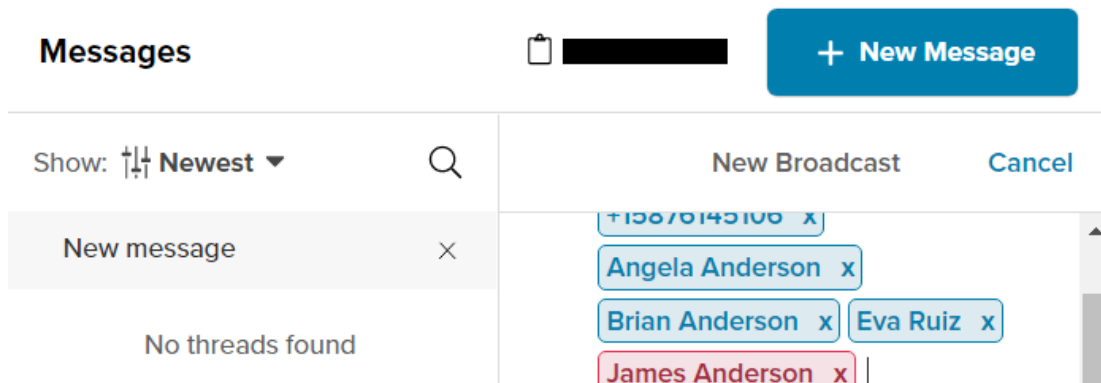


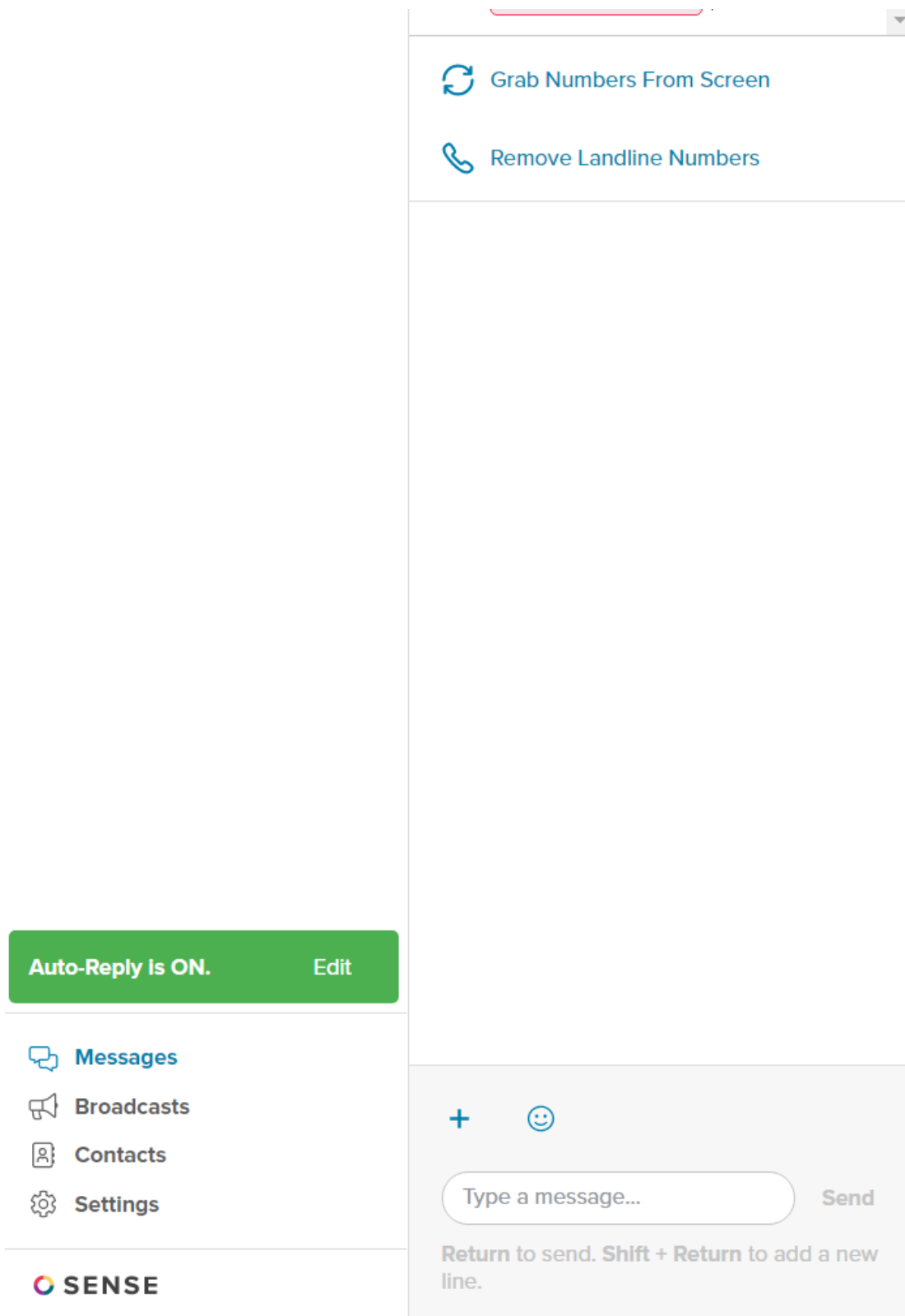
4. Select 'New Message' and then select 'Grab Numbers From Screen'. The extension will automatically parse the cell phone numbers and find contacts that are stored within Sense for text messages to be sent.



5. Once the contacts are found, you will have the option to add all to a mass text message, or select a single contact from the list. For this example, we will select 'Add All Contacts to Message'.

6. With the option selected, you will see all of the phone numbers added within the 'To:' field along with the option to remove landline numbers (highlighted in red). Considering messages cannot be sent to landline number, we will remove them from the recipient list:





7. With the correct phone numbers selected, the message can be entered within the 'Type a message' field and then the 'Send' option can be selected.
8. If the message was not scheduled to be sent, a warning will appear within the extension side bar, verifying that you want the message to be sent to the listed recipients. Select the 'Broadcast Now' option to continue:

Broadcast this message immediately?



This message will be broadcast to multiple recipients. Since no scheduling options have been added, this message will be sent immediately. Are you sure?

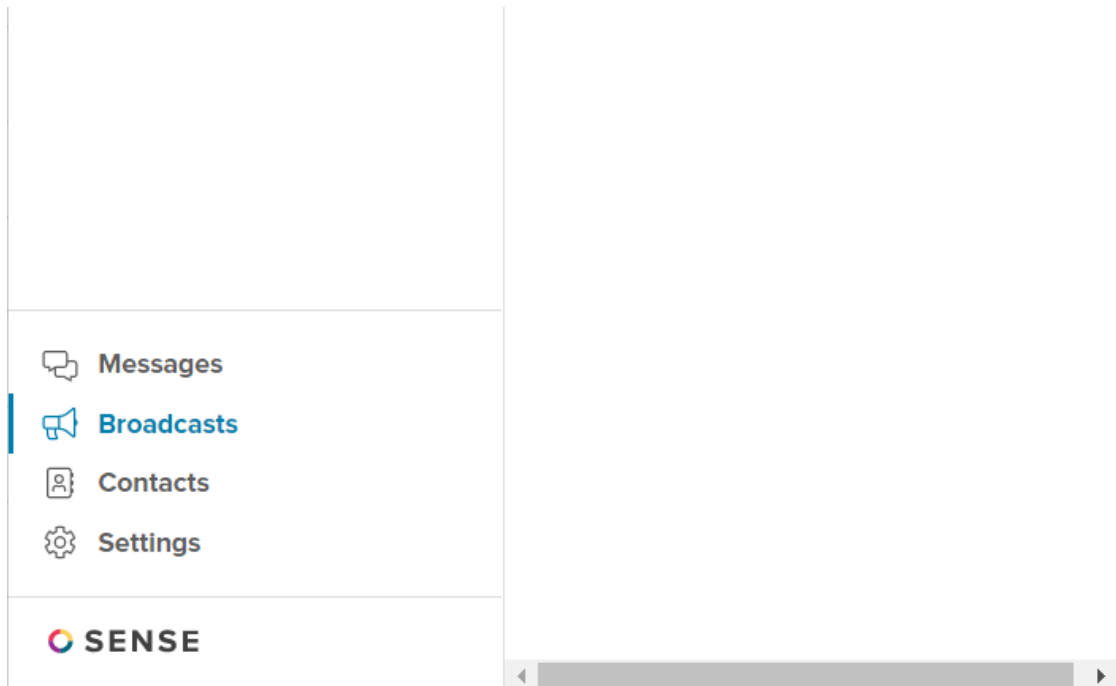
Cancel

Broadcast Now

9. Once the message has been sent, you will see the mass text, along with the recipients, within the sidebar:

The screenshot shows a sidebar interface with two main sections. The left section, titled "BROADCASTS", contains a summary for "Broadcast 0 (5)" with the message "Hello! This is a mass text messag..." and a status "Sent October 8th at 3:42pm". The right section, titled "Broadcast 0 (5)", displays the message content "Hello! This is a mass text message test." and a recipient list. The recipient list includes five entries: Angela Anderson (red minus icon), a redacted name (red minus icon), Brian Anderson (green checkmark), a redacted name (red minus icon), and Eva Ruiz (green checkmark). Above the list, there are icons for 5 recipients and 0 replies.

Recipient	Status
Angela Anderson	Failed
[Redacted]	Failed
Brian Anderson	Success
[Redacted]	Failed
Eva Ruiz	Success



10. Once the message has been sent successfully, the conversation will be saved as a message on the respective record within Beyond:



Note Once a record has been switched from Active to Inactive in Beyond, the record is synced to Sense one last time.

Along with required fields for syncing, the following must be true for the automatic syncing of Inactive records to Sense:

- For Employees:
 - Record has been deactivated within the last 2 years, or
 - Record was last synced with an Active status prior to being Deactivated.
- For Assignments, Contacts, Customers, Job Orders, and/or Service Reps:
 - Record was last synced with an Active status prior to being Deactivated.

Sense Web App

While the Sense Chrome Extension is a great tool to send mass text messages to many contacts, the Sense Web App provides much more analytical information along with being a hub for message management.

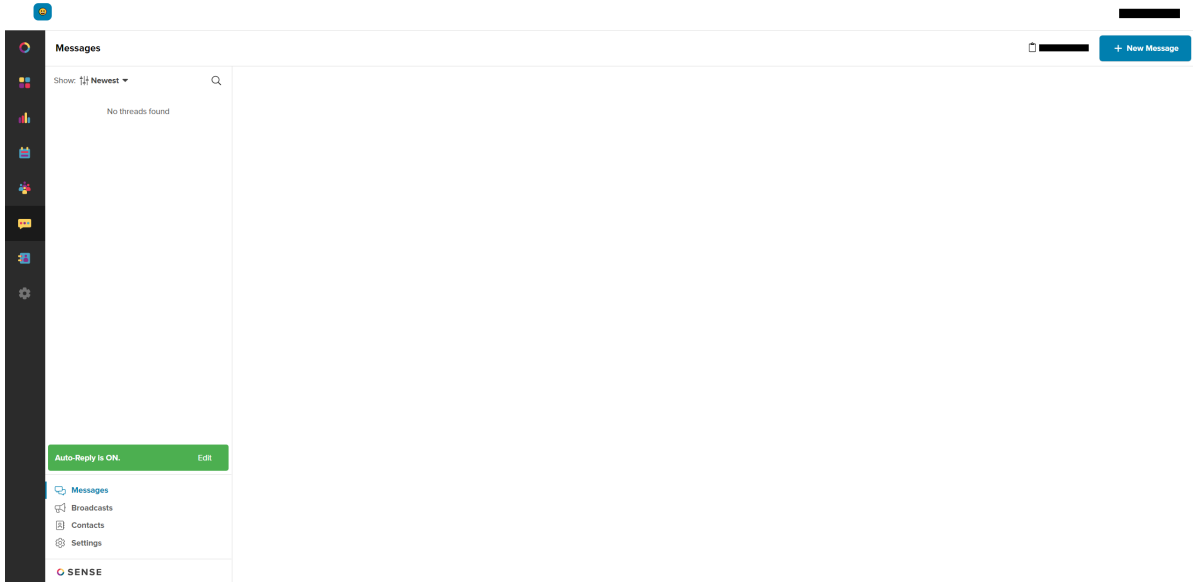
In addition to sending messages through the web app, you can also do the following:

- View analytics on messages that have been sent
- Schedule messages to send
- View and interact with contacts and previous messages

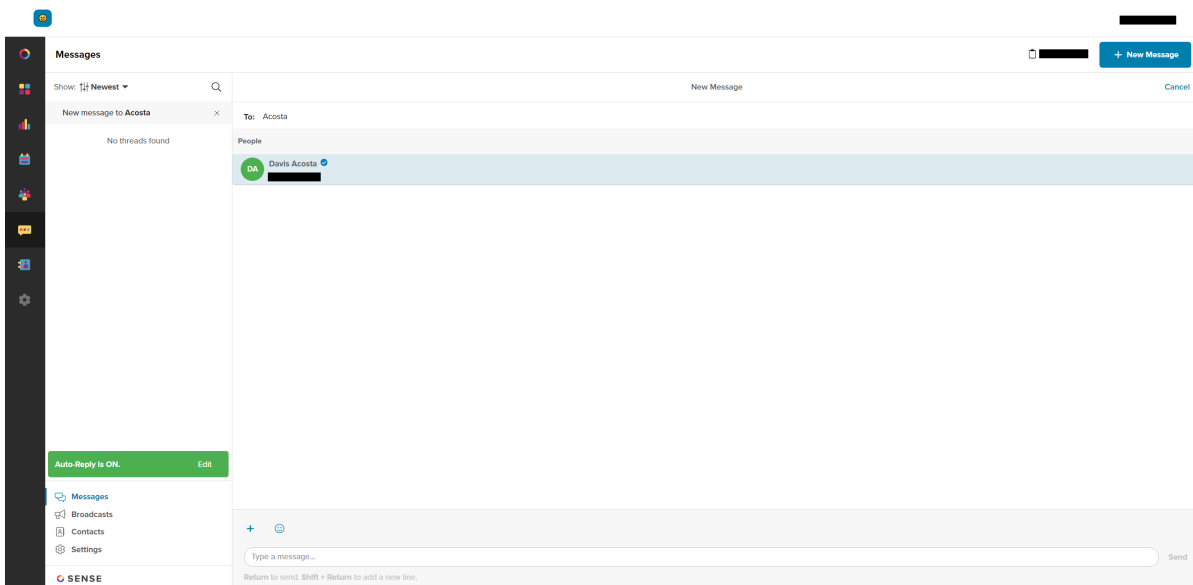
- Configure settings

The following is an example process of sending a message from the Sense Web App:

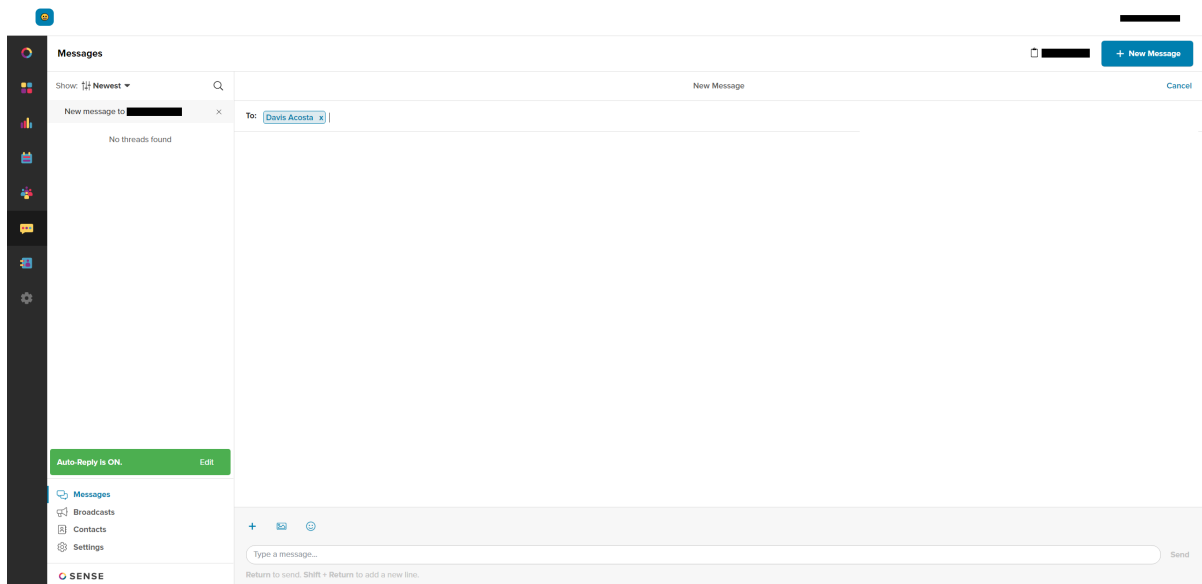
1. Navigate to your Sense Web App (personalized URL provided by Sense)
2. Select the 'Messages' tab on the left:



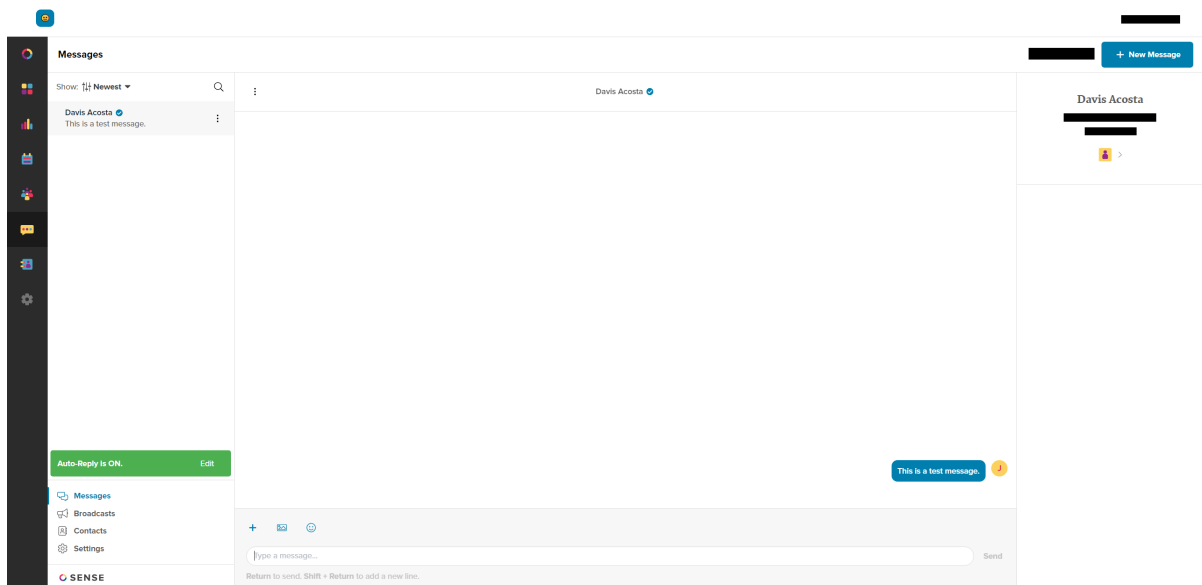
3. Select 'New Message' at the top right
4. Enter the name or the phone number of the contact that you would like to send a message to:



5. If a contact is found that matches the information entered, it will appear as able to be selected.
6. Select the contact record that you would like to send a message to and you will be able to either send a message to that one contact, or add further contacts within the 'To:' field by searching for another name or phone number:



- With our contact selected, enter the message you would like to send within the 'Send a Message' field, and select 'Send':



- Once the message has been sent successfully, the conversation will be saved as a message on the respective record within Beyond:

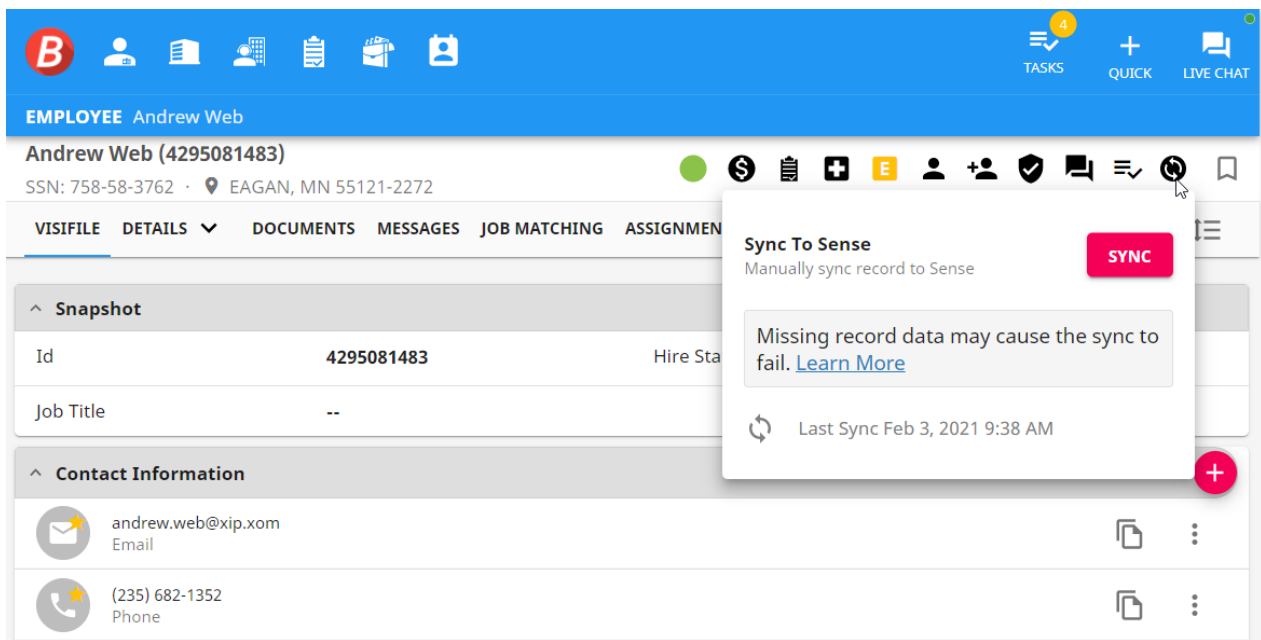


Manually Syncing Information with Sense

While information saved in Beyond syncs to Sense within 24-48 hours, you can manually push information to Sense when you are updating a record.

Note For a comprehensive list of fields that sync between Beyond and Sense, please see the following article titled: [Beyond - Fields that Sync with Sense](#).

Once you've updated information on a record, if you want to push the update to Sense, you can manually sync the information using the Sense Syncing Charm on any record:



Select the SYNC button to update with Sense. This charm will also let you know the last date this record was synced.

Keep in mind that Sense requires specific information in order to sync data from a record.

Related Articles