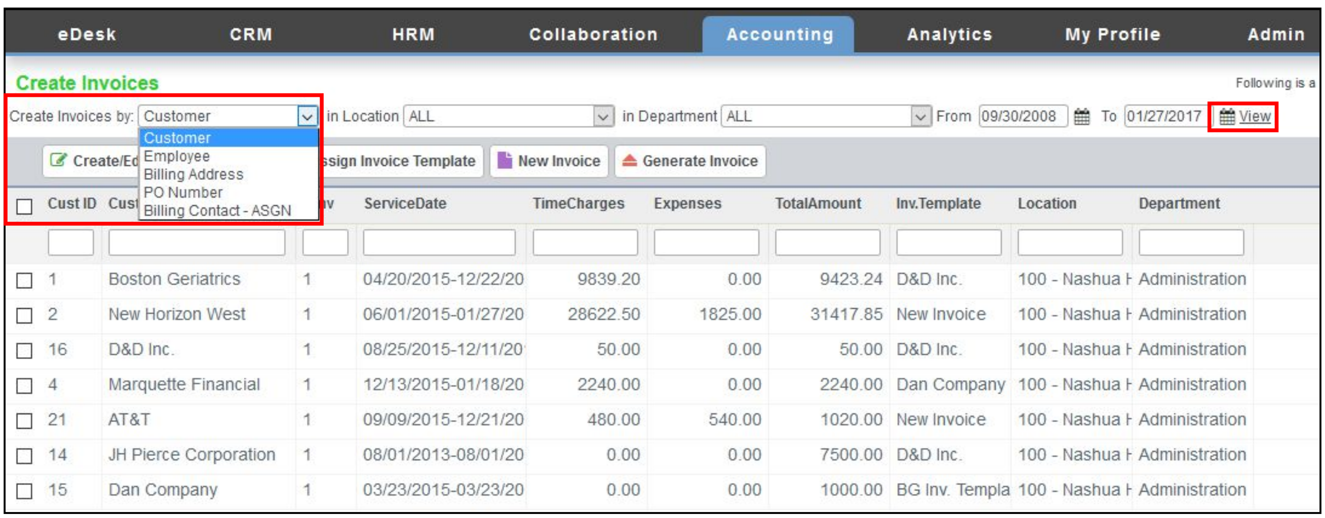
New AkkenCloud Features - February 6th, 2017

Creating and Emailing Invoices

For the first of two client-focused enhancements, we've introduced the ability for Akken users to Create Invoices by Billing Contact on Assignments. With this added flexibility you're no longer limited to creating invoices by the Customer, Employee, Billing Address or PO Number of an Assignment.

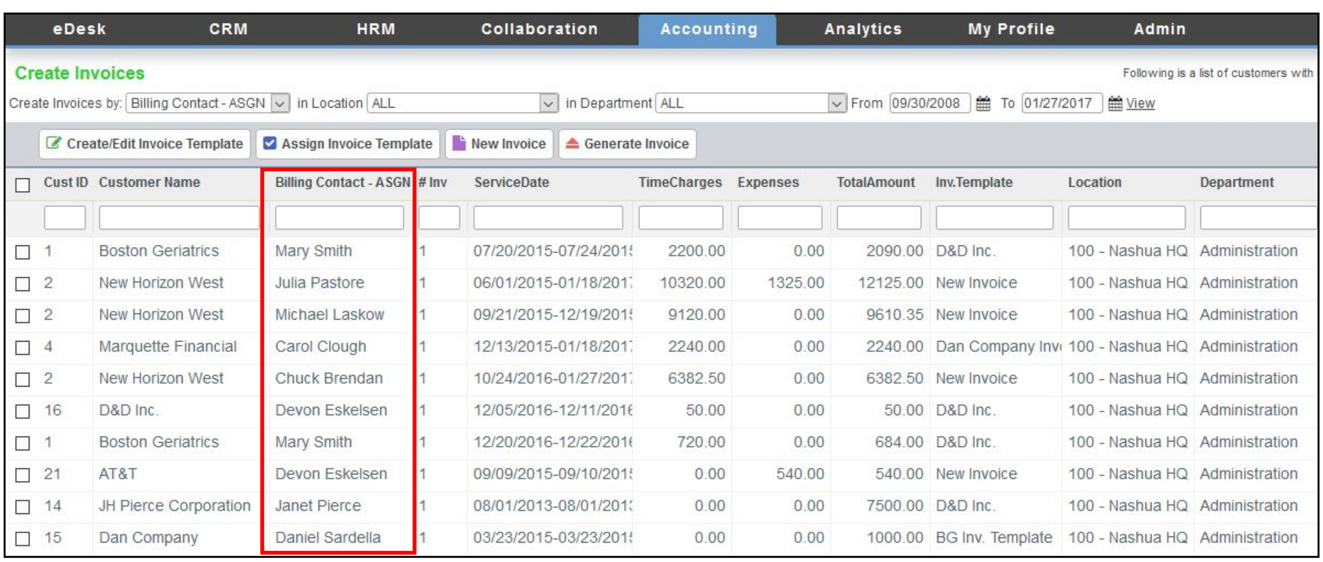
*You'll first need to ensure that a **Billing Contact** has been selected from the **Billing Information** section of the appropriate **Assignment**(s).*

To create invoices by Billing Contact on Assignment, go to **Accounting > Customers > Create Invoices**. From the **Create Invoices by** drop-down, select "**Billing Contact – ASGN**", select Location, Department and date range, if applicable, and then click "**View.**"



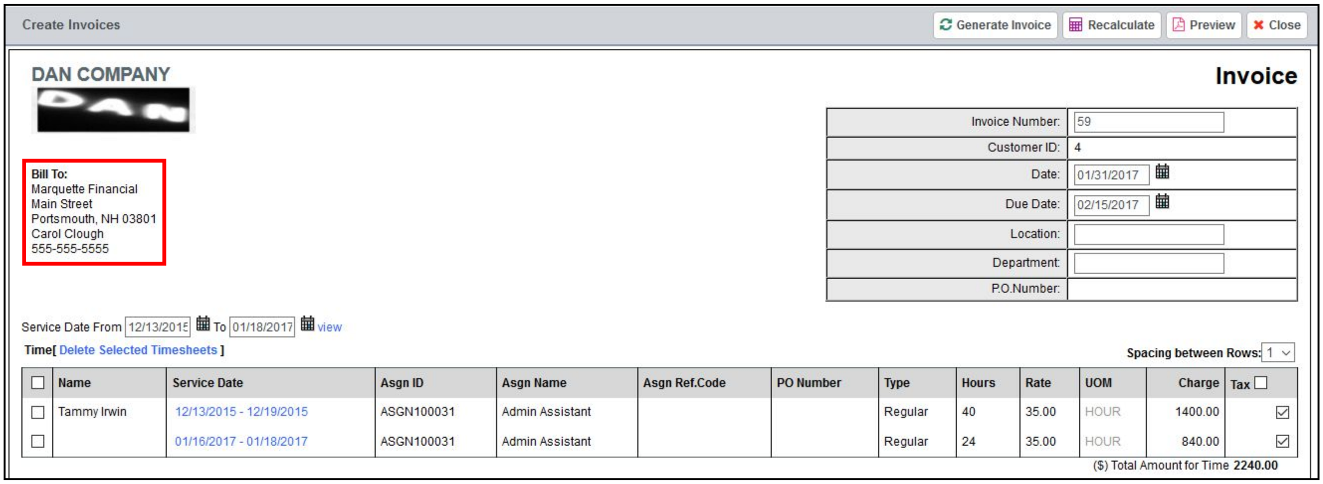
Cust ID	Cust	v	ServiceDate	TimeCharges	Expenses	TotalAmount	Inv.Template	Location	Department
1	Boston Geriatrics	1	04/20/2015-12/22/20	9839.20	0.00	9423.24	D&D Inc.	100 - Nashua H	Administration
2	New Horizon West	1	06/01/2015-01/27/20	28622.50	1825.00	31417.85	New Invoice	100 - Nashua H	Administration
16	D&D Inc.	1	08/25/2015-12/11/20	50.00	0.00	50.00	D&D Inc.	100 - Nashua H	Administration
4	Marquette Financial	1	12/13/2015-01/18/20	2240.00	0.00	2240.00	Dan Company	100 - Nashua H	Administration
21	AT&T	1	09/09/2015-12/21/20	480.00	540.00	1020.00	New Invoice	100 - Nashua H	Administration
14	JH Pierce Corporation	1	08/01/2013-08/01/20	0.00	0.00	7500.00	D&D Inc.	100 - Nashua H	Administration
15	Dan Company	1	03/23/2015-03/23/20	0.00	0.00	1000.00	BG Inv. Templa	100 - Nashua H	Administration

In this view, a Billing Contact – ASGN column is visible, which can be filtered and sorted.

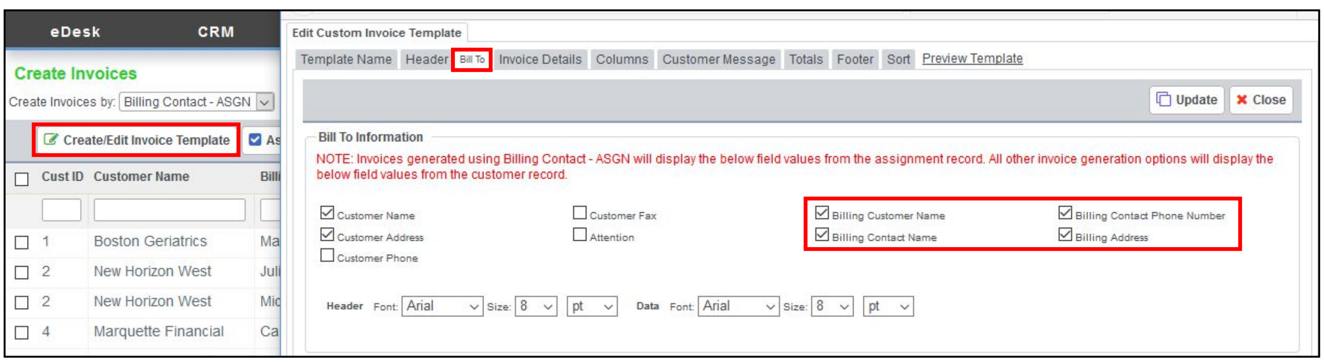


Cust ID	Customer Name	Billing Contact - ASGN	# Inv	ServiceDate	TimeCharges	Expenses	TotalAmount	Inv.Template	Location	Department
1	Boston Geriatrics	Mary Smith	1	07/20/2015-07/24/201	2200.00	0.00	2090.00	D&D Inc.	100 - Nashua HQ	Administration
2	New Horizon West	Julia Pastore	1	06/01/2015-01/18/201	10320.00	1325.00	12125.00	New Invoice	100 - Nashua HQ	Administration
2	New Horizon West	Michael Laskow	1	09/21/2015-12/19/201	9120.00	0.00	9610.35	New Invoice	100 - Nashua HQ	Administration
4	Marquette Financial	Carol Clough	1	12/13/2015-01/18/201	2240.00	0.00	2240.00	Dan Company Inv	100 - Nashua HQ	Administration
2	New Horizon West	Chuck Brendan	1	10/24/2016-01/27/201	6382.50	0.00	6382.50	New Invoice	100 - Nashua HQ	Administration
16	D&D Inc.	Devon Eskelsen	1	12/05/2016-12/11/201	50.00	0.00	50.00	D&D Inc.	100 - Nashua HQ	Administration
1	Boston Geriatrics	Mary Smith	1	12/20/2016-12/22/201	720.00	0.00	684.00	D&D Inc.	100 - Nashua HQ	Administration
21	AT&T	Devon Eskelsen	1	09/09/2015-09/10/201	0.00	540.00	540.00	New Invoice	100 - Nashua HQ	Administration
14	JH Pierce Corporation	Janet Pierce	1	08/01/2013-08/01/201	0.00	0.00	7500.00	D&D Inc.	100 - Nashua HQ	Administration
15	Dan Company	Daniel Sardella	1	03/23/2015-03/23/201	0.00	0.00	1000.00	BG Inv. Template	100 - Nashua HQ	Administration

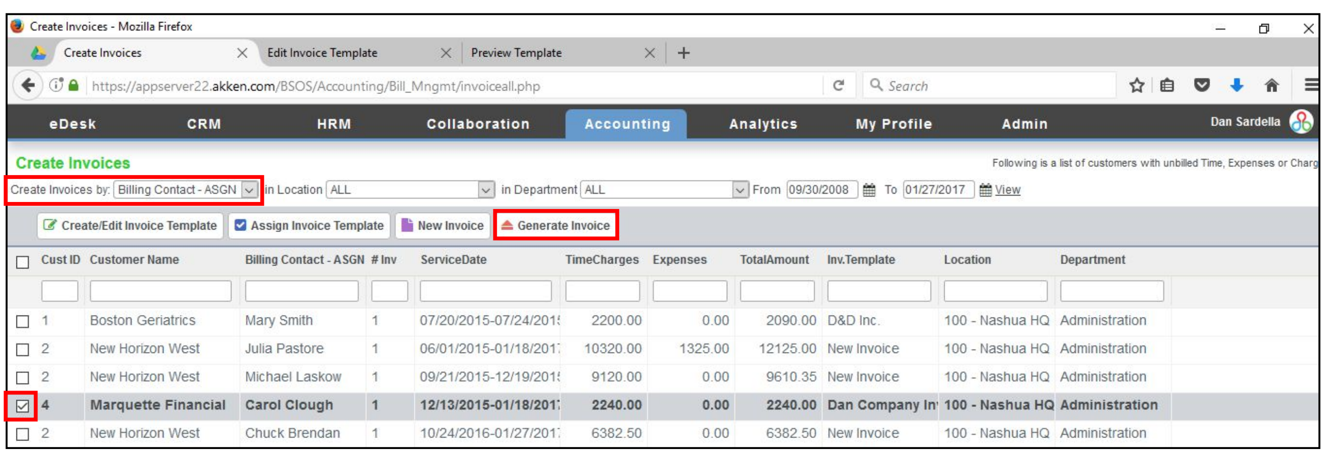
The invoices visible in that screen and the information that appears in the **Bill To** section (below) of the invoice both work in conjunction with the selections made in the **Bill To** tab of your **Invoice Templates**.



To check on this, go to **Accounting > Customers > Create Invoices > Create/Edit Invoice Template**. From there click **Edit** for the template you'd like to check. In the Edit screen, go to the **Bill To** tab. See the **NOTE** in the **Bill To Information**: Invoices generated using Billing Contact - ASGN will display the below ("Billing") field values (on the right-hand side) from the ***Assignment*** record. *All other invoice generation* options will display the below field values from the *Customer* record (left-hand side).

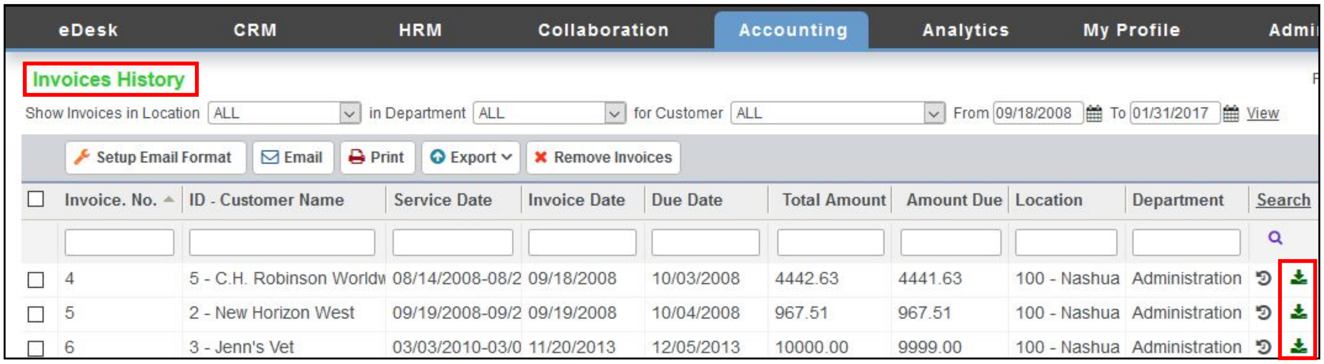


When generating the invoice(s), the system will save the type (Create Invoices by) option that was used upon generation.

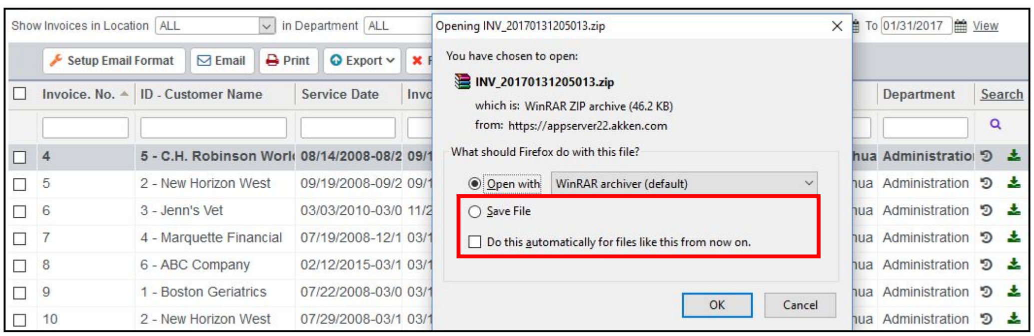


Once the invoice has been generated, you'll then need to deliver it from **Accounting > Customers > Deliver Invoices**. This will push the invoice to **Accounting > Customers > Invoices History.**

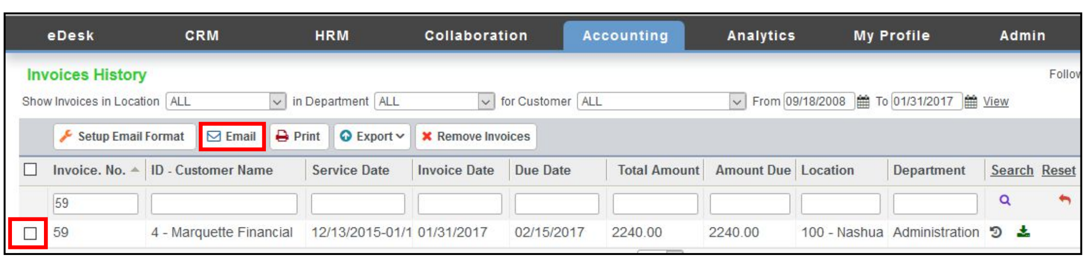
From **Accounting > Customers > Invoices History**, we've added a **Download** icon, allowing you to download each invoice and any timesheets or expenses attached into one zip file.



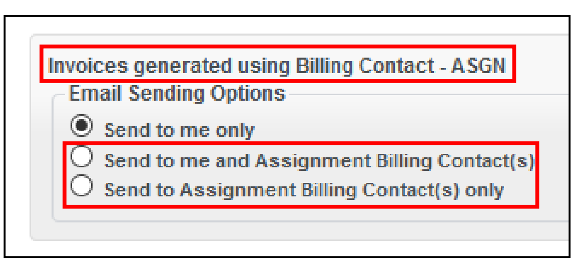
When you click the **Download** icon for any invoice, you'll be given options to either **Open** or **Save** the zip file.



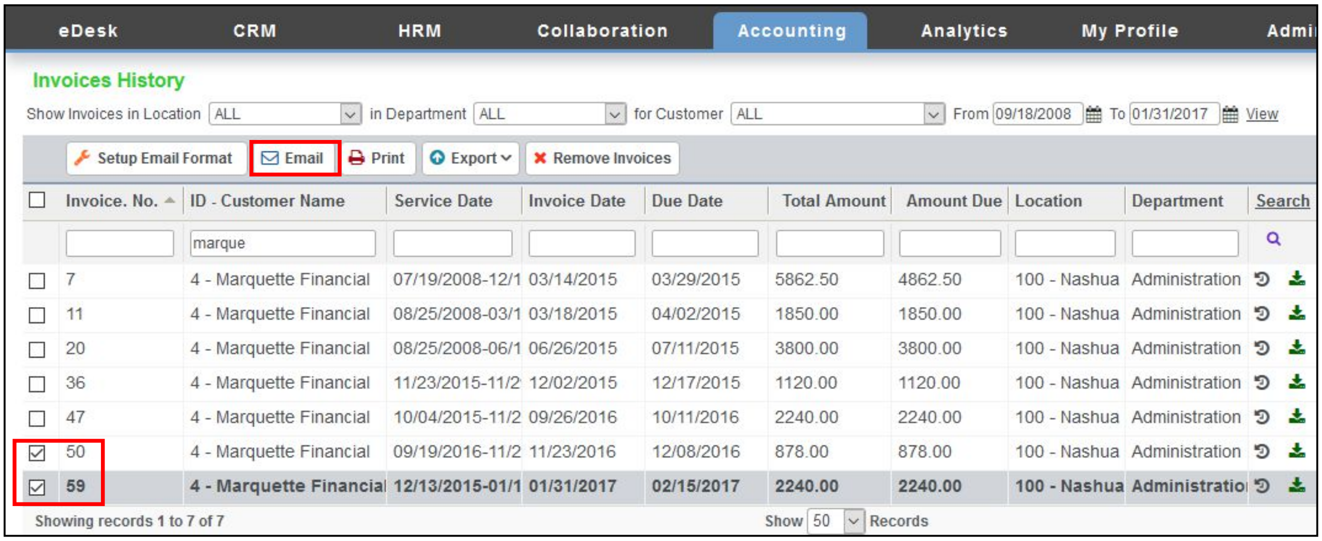
To email your invoice(s), select the invoice(s) and click **Email**.



Next choose what you want to send (for example "Email Invoice(s) Only"). In the next screen the system will display how the invoice was generated and give you options for sending to the contact which the invoice was generated by.

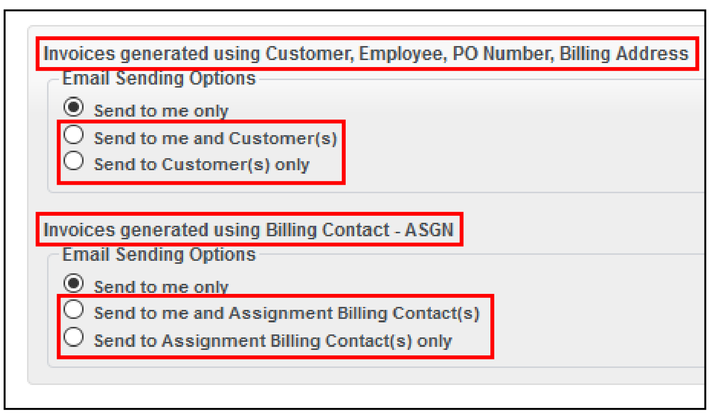


If invoices generated by different means are selected to email together, the options for sending will adjust accordingly.

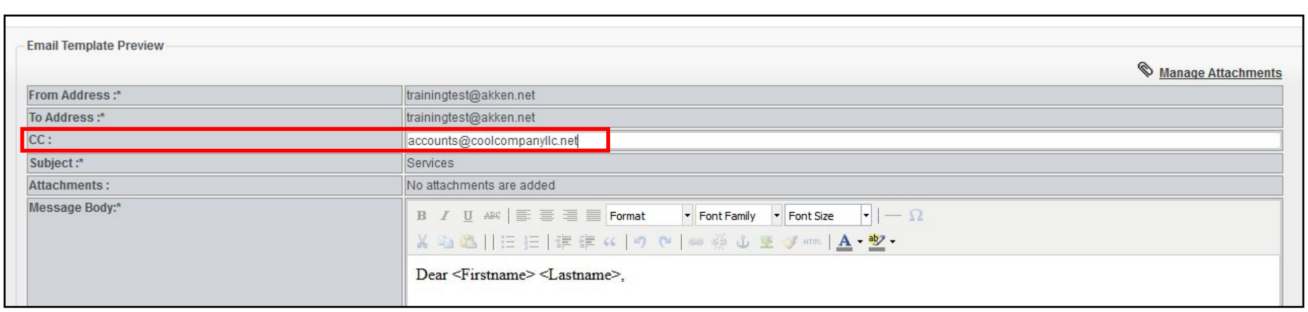


	Invoice. No.	ID - Customer Name	Service Date	Invoice Date	Due Date	Total Amount	Amount Due	Location	Department	Search
		marque								
☐	7	4 - Marquette Financial	07/19/2008-12/1	03/14/2015	03/29/2015	5862.50	4862.50	100 - Nashua	Administration	
☐	11	4 - Marquette Financial	08/25/2008-03/1	03/18/2015	04/02/2015	1850.00	1850.00	100 - Nashua	Administration	
☐	20	4 - Marquette Financial	08/25/2008-06/1	06/26/2015	07/11/2015	3800.00	3800.00	100 - Nashua	Administration	
☐	36	4 - Marquette Financial	11/23/2015-11/2	12/02/2015	12/17/2015	1120.00	1120.00	100 - Nashua	Administration	
☐	47	4 - Marquette Financial	10/04/2015-11/2	09/26/2016	10/11/2016	2240.00	2240.00	100 - Nashua	Administration	
☑	50	4 - Marquette Financial	09/19/2016-11/2	11/23/2016	12/08/2016	878.00	878.00	100 - Nashua	Administration	
☑	59	4 - Marquette Financial	12/13/2015-01/1	01/31/2017	02/15/2017	2240.00	2240.00	100 - Nashua	Administratio	

In this example, Invoice #50 was generated using either Customer, Employee, PO Number or Billing Address. Invoice #59 was generated using Billing Contact – ASGN. When the two are selected to Email together the following options will be available.



Additionally, we've expanded the invoice email process to include a Carbon Copy ("CC:") option, giving you the ability to email a single invoice and distribute to accountants. If you need to CC: more than one recipient, you can, provided you separate each by a comma.

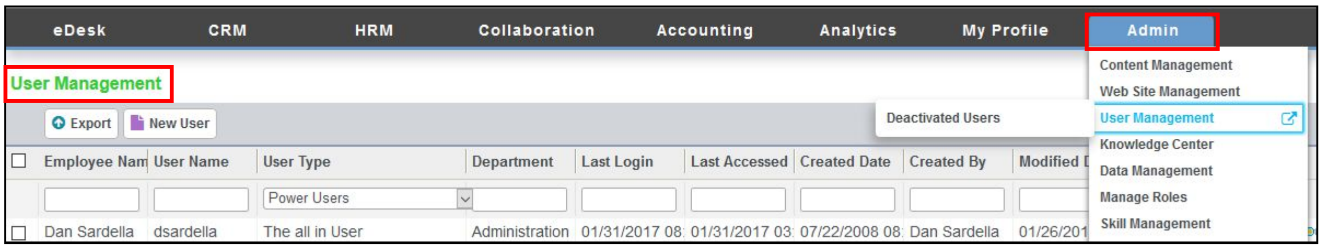


Customer Self Service Preferences

The other big client enhancement this month improves **Customer Self Service** users' visibility of Assignments, Timesheets and Expenses. We've added the ability for CSS users who are set as the **Billing Contact** on **Assignments** to now view and approve Timesheets and Expenses, regardless of whether they are set as the Contact on the Assignment.

*****You'll first need to ensure that a **Billing Contact** has been selected from the **Billing Information** section of the appropriate **Assignment**(s).*****

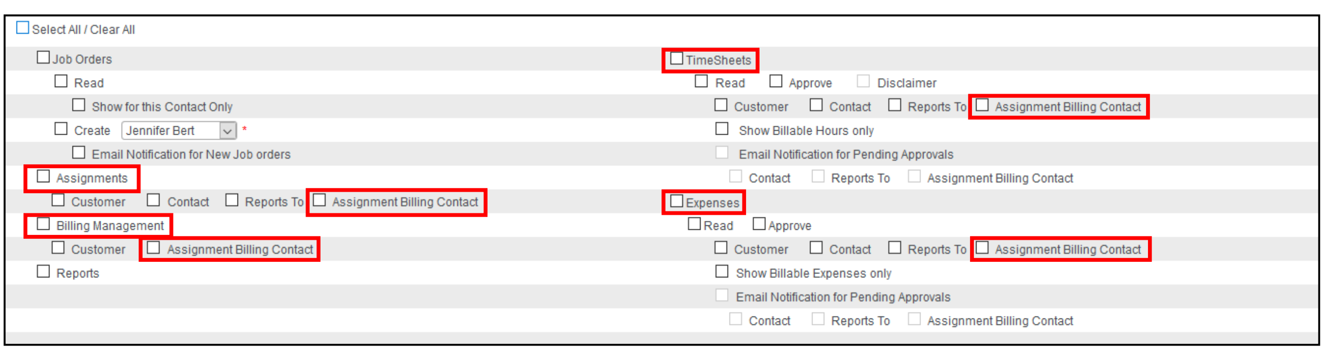
To set these new user preferences, go to **Admin > User Management**.



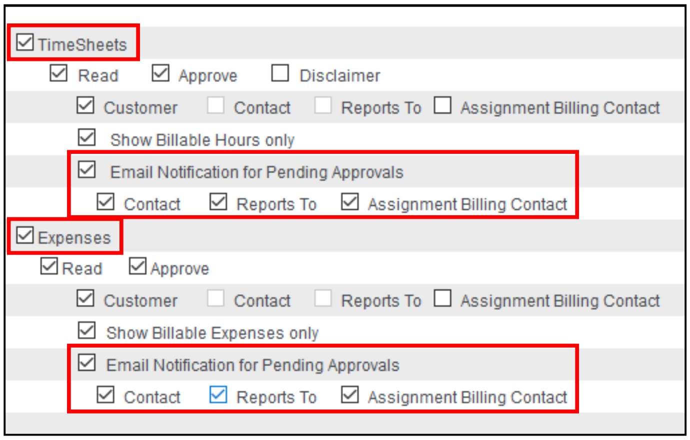
Change the **User Type** to **Customer Self Service Users**.

Select the **User Preferences** icon for a CSS user.

In the **User Preferences** screen, visibility of **Assignments**, **Billing Management** (Invoices), **Timesheets** and **Expenses** can now be determined by whether the CSS user is the **Assignment Billing Contact**, in addition to the existing options (Customer, Contact and Reports To) .



We’ve also added new options to **Email Notifications for Pending Approvals** (for **Timesheets** and **Expenses**), based on whether the CSS user is the **Contact** or the **Reports To** contact on the Assignment and/or the **Assignment Billing Contact**.



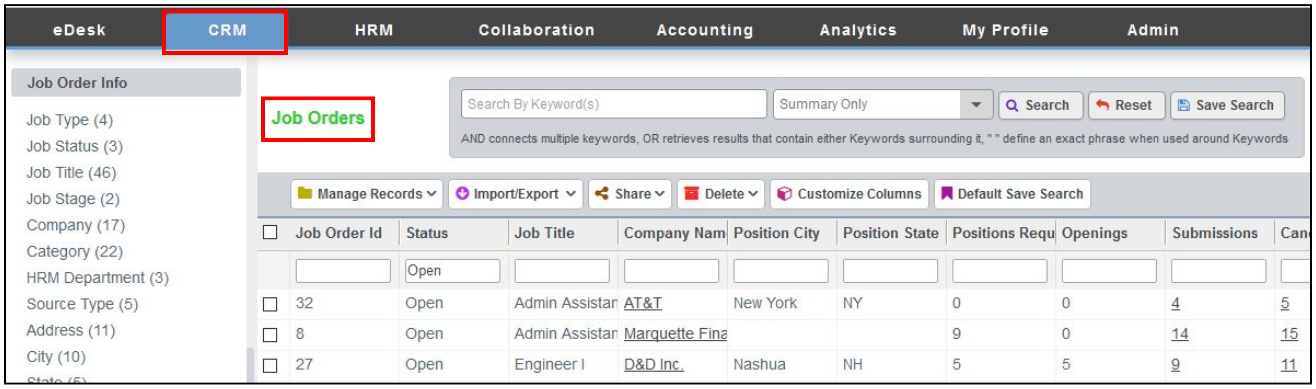
After you set the Preferences be sure to click **Save** or **Update**.

These enhancements offer additional levels of flexibility, saving time and improving your workflow.

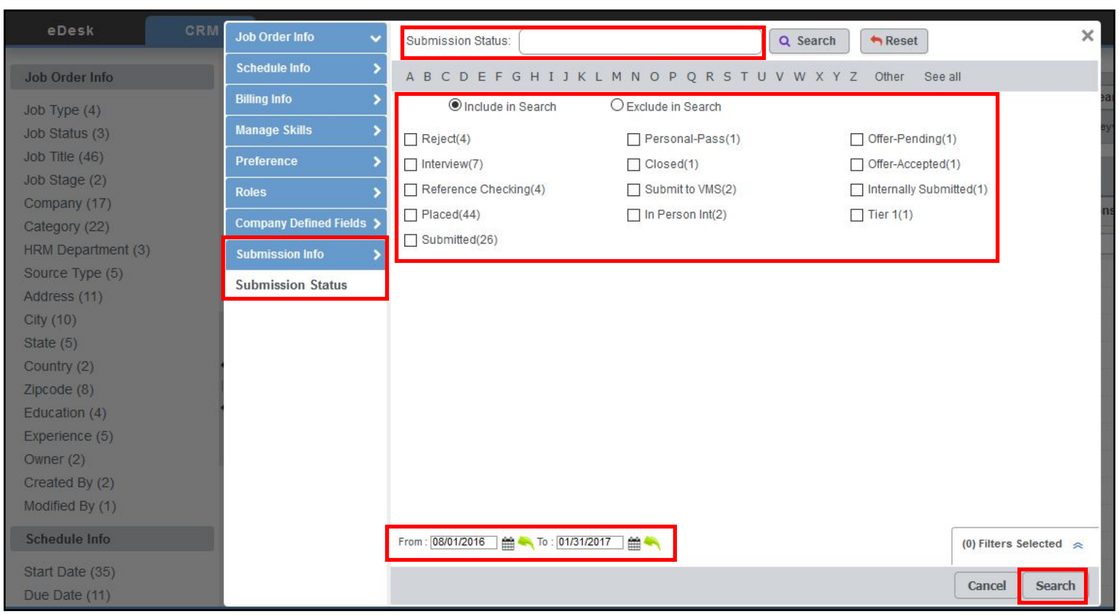
Submission Status in AkkuSearch

Without having to run a report or sift through multiple Job Orders, you can now quickly filter **Job Orders** by **Submission Status** using **AkkuSearch**. This time saving enhancement enables you to search all your Job Orders and filter by Submission Statuses in current use.

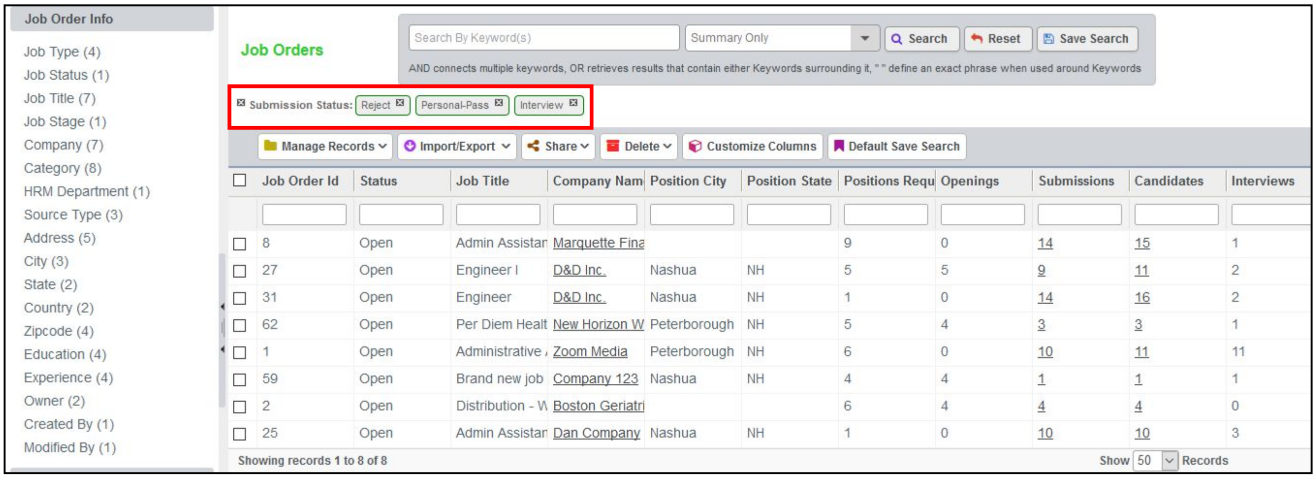
To utilize this enhancement, go to **CRM > Job Orders**.



Scroll to the bottom of the **AkkuSearch** bar on the left-hand side of your Job Orders and click **Submission Status**. From the AkkuSearch window you can search Submission Statuses, **Include** or **Exclude** statuses and even select a **date range** to include. After you've made you've selections, click **Search**.

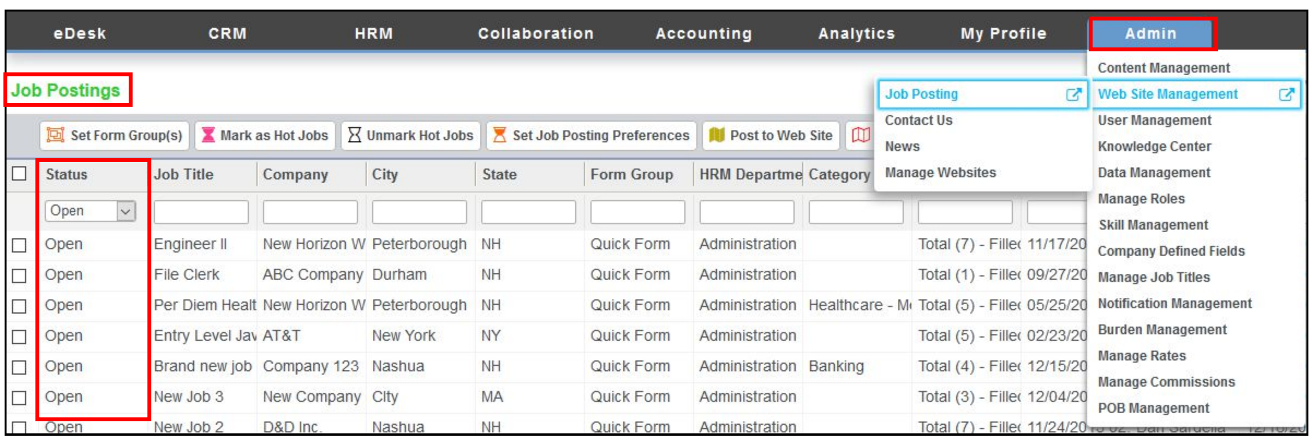


The Job Orders grid will display search results based on the parameters you selected.



Job Order Status

For our partners using Inbound Talent Marketing, we've added a **Status** column to **Admin > Web Site Management > Job Postings**.



Now you can filter the various statuses (Open, Closed, Filled, etc) of your posted Job Orders with a convenient drop-down option added to the grid.