

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**."

The screenshot shows the 'Create Invoices' page in the AkkenCloud application. The 'Create Invoices by' dropdown menu is open, displaying the following options: Customer, Employee, Billing Address, PO Number, and Billing Contact - ASGN. The 'View' button in the top right corner is highlighted with a red box. The table below shows a list of assignments with columns for Cust ID, Customer Name, ServiceDate, TimeCharges, Expenses, TotalAmount, Inv.Template, Location, and Department.

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

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

The screenshot shows the 'Create Invoices' page with the 'Billing Contact - ASGN' column visible. The 'Billing Contact - ASGN' column is highlighted with a red box. The table below shows a list of assignments with columns for Cust ID, Customer Name, Billing Contact - ASGN, # Inv, ServiceDate, TimeCharges, Expenses, TotalAmount, Inv.Template, Location, and Department.

Cust ID	Customer Name	Billing Contact - ASGN	# Inv	ServiceDate	TimeCharges	Expenses	TotalAmount	Inv.Template	Location	Department
1	Boston Geriatrics	Mary Smith	1	07/20/2015-07/24/2015	2200.00	0.00	2090.00	D&D Inc.	100 - Nashua HQ	Administration
2	New Horizon West	Julia Pastore	1	06/01/2015-01/18/2015	10320.00	1325.00	12125.00	New Invoice	100 - Nashua HQ	Administration
2	New Horizon West	Michael Laskow	1	09/21/2015-12/19/2015	9120.00	0.00	9610.35	New Invoice	100 - Nashua HQ	Administration
4	Marquette Financial	Carol Clough	1	12/13/2015-01/18/2015	2240.00	0.00	2240.00	Dan Company Inv	100 - Nashua HQ	Administration
2	New Horizon West	Chuck Brendan	1	10/24/2016-01/27/2017	6382.50	0.00	6382.50	New Invoice	100 - Nashua HQ	Administration
16	D&D Inc.	Devon Eskelsen	1	12/05/2016-12/11/2016	50.00	0.00	50.00	D&D Inc.	100 - Nashua HQ	Administration
1	Boston Geriatrics	Mary Smith	1	12/20/2016-12/22/2016	720.00	0.00	684.00	D&D Inc.	100 - Nashua HQ	Administration
21	AT&T	Devon Eskelsen	1	09/09/2015-09/10/2015	0.00	540.00	540.00	New Invoice	100 - Nashua HQ	Administration
14	JH Pierce Corporation	Janet Pierce	1	08/01/2013-08/01/2013	0.00	0.00	7500.00	D&D Inc.	100 - Nashua HQ	Administration
15	Dan Company	Daniel Sardella	1	03/23/2015-03/23/2015	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**.

Create Invoices

Generate Invoice Recalculate Preview Close

Bill To:
Marquette Financial
Main Street
Portsmouth, NH 03801
Carol Clough
555-555-5555

Invoice

Invoice Number:	59
Customer ID:	4
Date:	01/31/2017
Due Date:	02/15/2017
Location:	
Department:	
P.O. Number:	

Service Date From 12/13/2015 To 01/18/2017 view
Time [Delete Selected Timesheets]

	Name	Service Date	Asgn ID	Asgn Name	Asgn Ref. Code	PO Number	Type	Hours	Rate	UOM	Charge	Tax
<input type="checkbox"/>	Tammy Irwin	12/13/2015 - 12/19/2015	ASGN100031	Admin Assistant			Regular	40	35.00	HOUR	1400.00	<input checked="" type="checkbox"/>
<input type="checkbox"/>		01/16/2017 - 01/18/2017	ASGN100031	Admin Assistant			Regular	24	35.00	HOUR	840.00	<input checked="" type="checkbox"/>

Spacing between Rows: 1

(\$ Total Amount for Time 2240.00)

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).*

eDesk CRM

Create Invoices

Create Invoices by: Billing Contact - ASGN

Create/Edit Invoice Template

Template Name	Header	Bill To	Invoice Details	Columns	Customer Message	Totals	Footer	Sort	Preview Template
---------------	--------	---------	-----------------	---------	------------------	--------	--------	------	------------------

Update Close

Bill To Information
NOTE: Invoices generated using Billing Contact - ASGN will display the below field values from the assignment record. All other invoice generation options will display the below field values from the customer record.

☒ Customer Name
☒ Customer Address
☐ Customer Phone

☐ Customer Fax
☐ Attention

☒ Billing Customer Name
☒ Billing Contact Name
☒ Billing Contact Phone Number
☒ Billing Address

Header Font: Arial Size: 8 pt

Data Font: Arial Size: 8 pt

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

Create Invoices - Mozilla Firefox

Create Invoices Edit Invoice Template Preview Template

https://appserver22.akken.com/BSOS/Accounting/Bill_Mngmt/invoiceall.php

eDesk CRM HRM Collaboration Accounting Analytics My Profile Admin

Dan Sardella

Create Invoices

Create Invoices by: Billing Contact - ASGN In Location: ALL In Department: ALL From: 09/30/2008 To: 01/27/2017 View

Create/Edit Invoice Template Assign Invoice Template New Invoice Generate Invoice

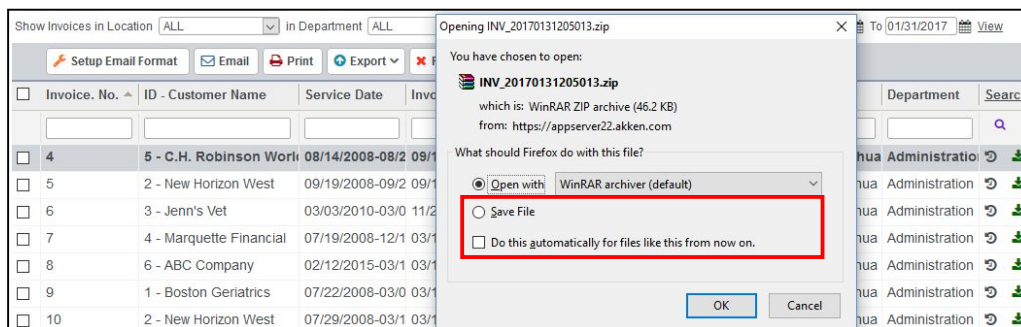
	Cust ID	Customer Name	Billing Contact - ASGN	# Inv	Service Date	Time Charges	Expenses	Total Amount	Inv. Template	Location	Department
<input type="checkbox"/>	1	Boston Geriatrics	Mary Smith	1	07/20/2015-07/24/2015	2200.00	0.00	2090.00	D&D Inc.	100 - Nashua HQ	Administration
<input type="checkbox"/>	2	New Horizon West	Julia Pastore	1	06/01/2015-01/18/2016	10320.00	1325.00	12125.00	New Invoice	100 - Nashua HQ	Administration
<input type="checkbox"/>	2	New Horizon West	Michael Laskow	1	09/21/2015-12/19/2015	9120.00	0.00	9610.35	New Invoice	100 - Nashua HQ	Administration
<input checked="" type="checkbox"/>	4	Marquette Financial	Carol Clough	1	12/13/2015-01/18/2016	2240.00	0.00	2240.00	Dan Company In	100 - Nashua HQ	Administration
<input type="checkbox"/>	2	New Horizon West	Chuck Brendan	1	10/24/2016-01/27/2017	6382.50	0.00	6382.50	New Invoice	100 - Nashua HQ	Administration

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.

eDesk CRM HRM Collaboration Accounting Analytics My Profile Admin										
Invoices History										
Show Invoices in Location ALL in Department ALL for Customer ALL From 09/18/2008 To 01/31/2017 View										
Setup Email Format Email Print Export Remove Invoices										
<input type="checkbox"/>	Invoice. No.	ID - Customer Name	Service Date	Invoice Date	Due Date	Total Amount	Amount Due	Location	Department	Search
<input type="checkbox"/>	4	5 - C.H. Robinson Worldw	08/14/2008-08/2	09/18/2008	10/03/2008	4442.63	4441.63	100 - Nashua	Administration	
<input type="checkbox"/>	5	2 - New Horizon West	09/19/2008-09/2	09/19/2008	10/04/2008	967.51	967.51	100 - Nashua	Administration	
<input type="checkbox"/>	6	3 - Jenn's Vet	03/03/2010-03/0	11/20/2013	12/05/2013	10000.00	9999.00	100 - Nashua	Administration	

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**.

eDesk CRM HRM Collaboration Accounting Analytics My Profile Admin										
Invoices History										
Show Invoices in Location ALL in Department ALL for Customer ALL From 09/18/2008 To 01/31/2017 View										
Setup Email Format Email Print Export Remove Invoices										
<input type="checkbox"/>	Invoice. No.	ID - Customer Name	Service Date	Invoice Date	Due Date	Total Amount	Amount Due	Location	Department	Search
<input type="checkbox"/>	59	4 - Marquette Financial	12/13/2015-01/1	01/31/2017	02/15/2017	2240.00	2240.00	100 - Nashua	Administration	

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.

Invoices generated using Billing Contact - ASGN

Email Sending Options

- ☒ Send to me only
- ☐ Send to me and Assignment Billing Contact(s)
- ☐ Send to Assignment Billing Contact(s) only

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

eDesk

CRM

HRM

Collaboration

Accounting

Analytics

My Profile

Admin

Invoices History

Show Invoices in Location ALL in Department ALL for Customer ALL From 09/18/2008 To 01/31/2017 View

Setup Email Format

Email

Print

Export

Remove Invoices

	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	Administration	

Showing records 1 to 7 of 7

Show 50 Records

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.

Invoices generated using Customer, Employee, PO Number, Billing Address
Email Sending Options

- ☒ Send to me only
- ☐ Send to me and Customer(s)
- ☐ Send to Customer(s) only

Invoices generated using Billing Contact - ASGN
Email Sending Options

- ☒ Send to me only
- ☐ Send to me and Assignment Billing Contact(s)
- ☐ Send to Assignment Billing Contact(s) only

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.

Email Template Preview
Manage Attachments

From Address:* trainingtest@akken.net
To Address:* trainingtest@akken.net
CC: accounts@coolcompanyllc.net
Subject:* Services
Attachments: No attachments are added
Message Body:*

Format
Font Family
Font Size

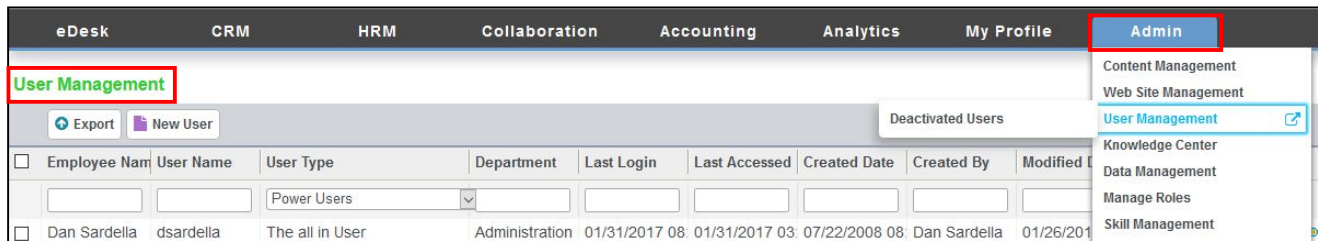
Dear <Firstname> <Lastname>,

Customer Self Service Preferences

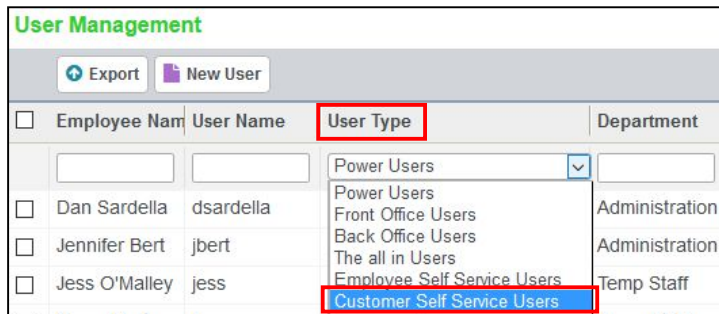
The other big client enhancement this month improves **Customer Self Service** users' visibility of Assignments, Timesheets and Expenses. We've added the ability for CSS users who are set as the **Billing Contact** on **Assignments** to now view and approve Timesheets and Expenses, regardless of whether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

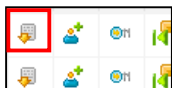
To set these new user preferences, go to **Admin > User Management**.



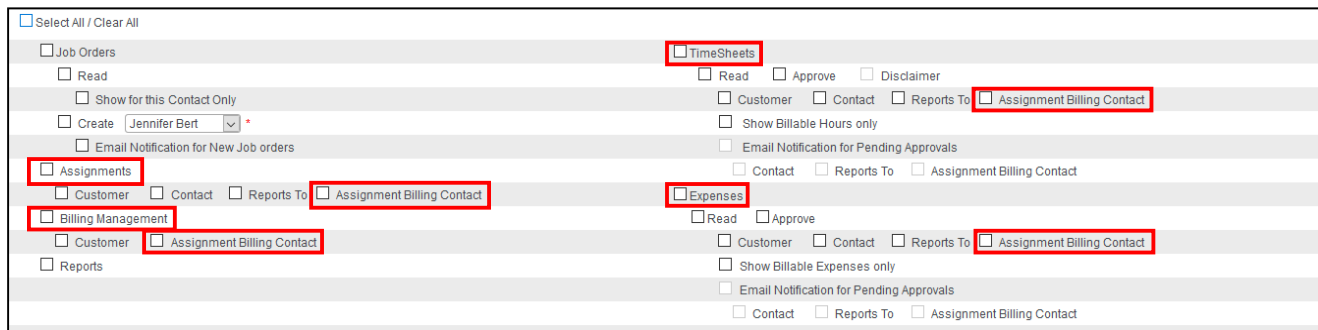
Change the **User Type** to **Customer Self Service Users**.



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**.

<input checked="" type="checkbox"/> TimeSheets
<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Approve <input type="checkbox"/> Disclaimer
<input checked="" type="checkbox"/> Customer <input type="checkbox"/> Contact <input type="checkbox"/> Reports To <input type="checkbox"/> Assignment Billing Contact
<input checked="" type="checkbox"/> Show Billable Hours only
<input checked="" type="checkbox"/> Email Notification for Pending Approvals
<input checked="" type="checkbox"/> Contact <input checked="" type="checkbox"/> Reports To <input checked="" type="checkbox"/> Assignment Billing Contact
<input checked="" type="checkbox"/> Expenses
<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Approve
<input checked="" type="checkbox"/> Customer <input type="checkbox"/> Contact <input type="checkbox"/> Reports To <input type="checkbox"/> Assignment Billing Contact
<input checked="" type="checkbox"/> Show Billable Expenses only
<input checked="" type="checkbox"/> Email Notification for Pending Approvals
<input checked="" type="checkbox"/> Contact <input checked="" type="checkbox"/> Reports To <input checked="" type="checkbox"/> 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**.

Job Order Id	Status	Job Title	Company Name	Position City	Position State	Positions Required	Openings	Submissions	Cancelled
32	Open	Admin Assistant	AT&T	New York	NY	0	0	4	5
8	Open	Admin Assistant	Marquette Fine			9	0	14	15
27	Open	Engineer I	D&D Inc.	Nashua	NH	5	5	9	11

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 your selections, click **Search**.

Submission Status:

☒ Include in Search
 ☐ Exclude in Search

☐ Reject(4)
 ☐ Personal-Pass(1)
 ☐ Offer-Pending(1)

☐ Interview(7)
 ☐ Closed(1)
 ☐ Offer-Accepted(1)

☐ Reference Checking(4)
 ☐ Submit to VMS(2)
 ☐ Internally Submitted(1)

☐ Placed(44)
 ☐ In Person Int(2)
 ☐ Tier 1(1)

☐ Submitted(26)

From: 08/01/2016 To: 01/31/2017

(0) Filters Selected

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

Job Order Info

Job Type (4)
Job Status (1)
Job Title (7)
Job Stage (1)
Company (7)
Category (8)
HRM Department (1)
Source Type (3)
Address (5)
City (3)
State (2)
Country (2)
Zipcode (4)
Education (4)
Experience (4)
Owner (2)
Created By (1)
Modified By (1)

Job Orders

Search By Keyword(s)
Summary Only
Search
Reset
Save Search

AND connects multiple keywords, OR retrieves results that contain either Keywords surrounding it, " " define an exact phrase when used around Keywords

Submission Status:
Reject
Personal-Pass
Interview

Manage Records
Import/Export
Share
Delete
Customize Columns
Default Save Search

<input type="checkbox"/>	Job Order Id	Status	Job Title	Company Name	Position City	Position State	Positions Requ	Openings	Submissions	Candidates	Interviews
<input type="checkbox"/>	8	Open	Admin Assistan	Marquette Finc			9	0	14	15	1
<input type="checkbox"/>	27	Open	Engineer I	D&D Inc.	Nashua	NH	5	5	9	11	2
<input type="checkbox"/>	31	Open	Engineer	D&D Inc.	Nashua	NH	1	0	14	16	2
<input type="checkbox"/>	62	Open	Per Diem Healt	New Horizon W	Peterborough	NH	5	4	3	3	1
<input type="checkbox"/>	1	Open	Administrative	Zoom Media	Peterborough	NH	6	0	10	11	11
<input type="checkbox"/>	59	Open	Brand new job	Company 123	Nashua	NH	4	4	1	1	1
<input type="checkbox"/>	2	Open	Distribution - V	Boston Geriatr			6	4	4	4	0
<input type="checkbox"/>	25	Open	Admin Assistan	Dan Company	Nashua	NH	1	0	10	10	3

Showing records 1 to 8 of 8

Show 50 Records

Job Order Status

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

eDeskCRMHRMCollaborationAccountingAnalyticsMy ProfileAdmin

Job Postings

Set Form Group(s)
Mark as Hot Jobs
Unmark Hot Jobs
Set Job Posting Preferences
Post to Web Site

<input type="checkbox"/>	Status	Job Title	Company	City	State	Form Group	HRM Department	Category	
<input type="checkbox"/>	Open								
<input type="checkbox"/>	Open	Engineer II	New Horizon W	Peterborough	NH	Quick Form	Administration		Total (7) - Filler 11/17/20
<input type="checkbox"/>	Open	File Clerk	ABC Company	Durham	NH	Quick Form	Administration		Total (1) - Filler 09/27/20
<input type="checkbox"/>	Open	Per Diem Healt	New Horizon W	Peterborough	NH	Quick Form	Administration	Healthcare - M	Total (5) - Filler 05/25/20
<input type="checkbox"/>	Open	Entry Level Jav	AT&T	New York	NY	Quick Form	Administration		Total (5) - Filler 02/23/20
<input type="checkbox"/>	Open	Brand new job	Company 123	Nashua	NH	Quick Form	Administration	Banking	Total (4) - Filler 12/15/20
<input type="checkbox"/>	Open	New Job 3	New Company	City	MA	Quick Form	Administration		Total (3) - Filler 12/04/20
<input type="checkbox"/>	Open	New Job 2	D&D Inc.	Nashua	NH	Quick Form	Administration		Total (7) - Filler 11/24/20

Job Posting
Web Site Management
Contact Us
News
Manage Websites

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.

eDeskCRMHRMCollaboration

Job Postings

Set Form Group(s)
Mark as Hot Jobs
Unmark Hot Jobs
Set Job Pos

<input type="checkbox"/>	Status	Job Title	Company	City	State
<input type="checkbox"/>	Open				
<input type="checkbox"/>	All	Engineer II	New Horizon W	Peterborough	NH
<input type="checkbox"/>	Cancelled	File Clerk	ABC Company	Durham	NH
<input type="checkbox"/>	Closed				
<input type="checkbox"/>	Filled				
<input type="checkbox"/>	Open	Per Diem Healt	New Horizon W	Peterborough	NH