

New AkkenCloud Features - May 1st, 2017

Save Time Keeping Your Front and Back Office in Sync

With CRM & HRM Communication, you now have the ability to sync updates to Candidate and Employee records. From a Candidate record, recruiters will now be able to update Employee information and view information updated in the Employee record. Profile data will synchronize and remain accurate in both CRM and HRM, eliminating the need for double entry.

To grant an AkkenCloud user access to this enhancement, go to **Admin > User Management** and select the first icon (**Preferences**) for the user.



Select the appropriate options per the screenshot below.

User Management	
<input type="checkbox"/> Select All / Clear All	
<input checked="" type="checkbox"/> CRM	<input checked="" type="checkbox"/> HRM
<input checked="" type="checkbox"/> eCampaigns	<input type="checkbox"/> Overseas Recruiting
<input checked="" type="checkbox"/> Contacts	<input checked="" type="checkbox"/> Applicant Tracking
<input checked="" type="checkbox"/> Import	<input checked="" type="checkbox"/> Add Skills
<input checked="" type="checkbox"/> Export	<input checked="" type="checkbox"/> Merge
<input checked="" type="checkbox"/> Merge	<input checked="" type="checkbox"/> Hiring Management
<input checked="" type="checkbox"/> Paperless OnBoarding	<input checked="" type="checkbox"/> Add Changes To CRM-Candidates
<input checked="" type="checkbox"/> Companies	<input type="checkbox"/> Hiring Review
<input checked="" type="checkbox"/> Import	<input checked="" type="checkbox"/> Employee Manageme
<input checked="" type="checkbox"/> Export	<input checked="" type="checkbox"/> Add Skills
<input checked="" type="checkbox"/> Merge	<input checked="" type="checkbox"/> Add Changes To CRM-Candidates
<input checked="" type="checkbox"/> Candidates	<input type="checkbox"/> Employee Review
<input checked="" type="checkbox"/> Import	<input checked="" type="checkbox"/> Benefits
<input checked="" type="checkbox"/> Export	<input checked="" type="checkbox"/> Departments
<input checked="" type="checkbox"/> Merge	<input checked="" type="checkbox"/> Locations
<input checked="" type="checkbox"/> Add Skills	
<input checked="" type="checkbox"/> Paperless OnBoarding	
<input checked="" type="checkbox"/> Add Changes to HRM	
<input checked="" type="checkbox"/> Job Orders	

By selecting **Add Changes to HRM** under **Candidates** from the **CRM** column, you'll be granting the user the ability to update both the Candidate and Employee record when making changes in **CRM > Candidates**.

By selecting **Add Changes to CRM-Candidates** under **Hiring Management** from the **HRM** column, you'll be granting the user the ability to update both the Employee and Candidate record when making changes in **HRM > Hiring Management**.

By selecting **Add Changes to CRM-Candidates** under **Employee Management** from the **HRM** column, you'll be granting the user the ability to update both the Employee and Candidate record when making changes in **HRM > Employee Management**.

After making selections, click 'Update.'

Scenario 1: Changes made to a record in **HRM > Hiring Management** will be updated in **CRM > Candidate** record.

Example: From **CRM > Candidates** the address in **Contact Info** for this record is blank.

From **HRM > Hiring Management** information is updated and **Saved**.

Information is automatically updated in the **CRM > Candidate** record.

Scenario 2: Changes made to a record in **HRM > Employee Management** will be updated in **CRM > Candidate** record.

Scenario 3: Changes made to a record in **CRM > Candidates** will be updated in **HRM > Hiring Management** record.

Scenario 4: Changes made to a record in **CRM > Candidates** will be updated in **HRM > Employee Management** record.

Lightning Fast Search to Find the Nearest Candidates to a Job

We've added back Zip Code Radius (ZCR) & Area Code Radius (ACR) filters in the Candidate search to reduce the steps involved before results are displayed. Using AkkuSearch for an ACR or ZCR radius, you can then easily filter and sort results, making ranking Candidates by proximity a snap!

The **ACR** and **ZCR** columns will display in the **CRM > Candidates** screen only when **Primary Phone** and **Zip** columns, respectively, are enabled on the grid. ACR column is tied to the Primary Phone column and ZCR column is tied to the Zip column. The ACR and ZCR columns can be enabled or removed by adding or removing the Primary Phone or Zip columns, respectively, via the **Customize Columns** button above the grid.

To perform an ACR or ZCR search, launch the AkkuSearch window by clicking the name of the field to the left of the Candidate grid. In the example below, the AkkuSearch window was launched by clicking **Zipcode**.

Enter a **Zipcode** and a **radius**, then click **'Search.'**

Zipcode: 03801-100 miles

Areacode: 978-50 miles

Paperless Onboarding

Manage Records

Import/Export

Share

Delete

Source Candidates

Customize Columns

All Search

<input type="checkbox"/>	Profile Title	First Name	Last Name	Company Name	Email	Primary Phone	ACR	City	State	Zip	ZCR
<input type="checkbox"/>	Clerk	Tracey	Irwin	Contoso, Ltd.	tinwin@yahoo.	781-890-3456	32.94	Lexington	MA	01830	22.84
<input type="checkbox"/>	IT	Happy	McGee	Comcast	happy.mcgee@	603-555-1234	25.10	Nashua	NH	03062	42.25
<input type="checkbox"/>	Executive Assist	Thomas	Logue		fakeemail@ya	781-665-8523	32.94	Andover	MA	01810	34.32
<input type="checkbox"/>	Sales - Outside	Reggie	Jackson	Yankees Corpor	fakeemail@ya	978-541-3658	0.00	Townsend	MA	01474	55.22
<input type="checkbox"/>	Sales - Inside	Isaac	Newton	What Goes Up	wickedsmahgtu	978-765-4321	0.00	Appletown	MA	01879	42.77
<input type="checkbox"/>	Project Manager	Thomas	Peters	Stinger Ghaffari	tom.peters.ap		32.94	Dedham	MA	02026	60.03

Keep Your Employee Credentials Current

With our new Credentials Management Enhancement, employees on active Assignments can now receive email notifications of their expiring and expired Credentials. You'll no longer need to individually reach out to Employees to remind them when their Credentials expire, allowing you to more efficiently keep employees compliant.

In the existing functionality, notifications of expiring/expired credentials for Candidates and Employees can be sent to users with Roles selected, Owners of the records and/or Internal Direct Employees. With this new enhancement, Employees on active Assignments can **also** receive notifications of expiring/expired Credentials.

Please note: Employee must have Credential(s) with *Valid To* date field populated in their *HRM > Employee Management* record to receive notifications. Example below.

James Joseph

Profile Data | HR Data | Resume | Activities

Candidate Info | Contact Info | Skills | Education | Work Experience | Status | Affiliations | Additional Information | References | **Credentials** | Availability

Employee Management Add Credentials Update Close

Credential Type: --Select-- [edit list](#)

Credential Name: [edit list](#)

Country:

Valid State:

Credential Number:

Acquired Date:

Valid From:

Valid To:

Verified By: --Select--

Verified Date:

[Comments](#)

Upload Documents (Max. 10 files can be uploaded) [Attach Documents](#)

[Delete Selected Items](#) [Archive Selected Items](#) [View Archive Items](#)

<input type="checkbox"/>	Credential Type	Credential Name	Credential Number	Valid State	Acquired Date	Valid From	Valid To	Documents	Status
<input type="checkbox"/>	BPW	BPW Level 1	123	Alabama	04/01/2017	04/01/2017	08/01/2017	- NA -	Active

To set up the Employee notifications go to **Admin > Notification Management**.

ics **My Profile** **Admin**

- Content Management
- Web Site Management
- User Management
- Knowledge Center
- Data Management
- Manage Roles
- Skill Management
- Company Defined Fields
- Manage Job Titles
- Credential Management**
- Notification Management** [🔗](#)
- Manage Job Types

Notifications Management

Update

Notification Settings Updated Successfully.

☒ Credential Management Notification

Credentials Of

Mode of Notification

Credential(s) expiring in

Notify To

☒ Candidates ☒ Employees

☒ Email ☐ SMS ☐ Popup

☒ 1 Day ☒ 1 Week ☒ 1 Month ☐ 2 Months ☐ 3 Months

☐ Roles ☐ Owner ☒ Employees (Internal Direct)

Add/Remove

Dan Sardella

☒ Send weekly reminder to Employees on active Assignment(s) for expired credential(s)

Get Paid Faster by Automating the Vendor Management Process

By selecting a Recruiter on a Candidate record, Vendor information will now auto-populate on the Employee record (once hired), eliminating the need to manually enter this information, and to help automate the Vendor payment process.

With this enhancement, by selecting a **Recruiter** in the **Contact Info** section of a **Candidate** record, vendor information will auto populate once the Candidate is hired, provided the **CRM > Company 'Status'** is selected as "Vendor." Once the **Employee** record is created, the **Tax Deductions** will display as **C-to-C (Corp to Corp)** and the **Vendor** will be auto-populated.

From **CRM > Companies**, double-click to open a **Company** record.

Select "**Vendor**" from the **Status** drop-down and '**Update**' the record.

From **CRM > Candidates**, double-click to open a **Candidate** record.

From the **Contact Info** tab, under **Recruiter Contact Information**, click the magnifying glass icon to search for a **Contact -or- Create New Contact** (which will need to be added to a Company with “Vendor” Status).

Search and select a Contact at a Company with “Vendor” Status.

Once the **Recruiter Contact Information** has been populated, ‘**Update**’ the Candidate record.

Submit the Candidate to a **Job Order** and **Place** on an **Assignment**.

From **HRM > Hiring Management**, double-click to open the record.

eDeskCRMHRMCollaborationAccountingAnalytics

Hiring Management

From the **HR Data > Tax Deductions** tab, the **Tax Type** will display as **C-to-C (Corp to Corp)** and the Vendor information will be auto-populated. The click **'Hire'** to hire the Employee.

Robert Altman

Profile Data **HR Data** Resume Activities

Immigration Compensation Personal Profile Assignments Reporting **Tax Deductions** Other Deductions Other Expenses Ben

Employee Management

Tax ☐ W-2 ☐ 1099 ☒ C-to-C ☐ None

Contractor's Federal EIN #

Vendor Name* [select vendor](#) | [new vendor](#)

Address

City

State

Zip

From **Accounting > Vendors**, double-click to open the **Vendor** record.

eDesk

CRM

HRM

Collaboration

Accounting

Analytics

Vendors

Add a Vendor

Terms Setup

Vendor	Vendor Id	Type	Current	1-30	31-60		Due
<input type="text"/>	<input type="text"/>	All					
General Vendor 1	1	General Vendor	0.00	0.00	0.00		0.00
Vendor	9	General Vendor	0.00	0.00	0.00		150.00
Vendor 3	25	General Vendor	0.00	0.00	0.00		0.00
Subsidiary Corp	3	Consulting Vendor	0.00	0.00	0.00	0.00	0.00
Vendor 2	14	Consulting Vendor	0.00	0.00	0.00	0.00	0.00
Otterbox	26	Consulting Vendor	0.00	0.00	0.00	0.00	0.00
Test Consultant	6	Consultant	0.00	0.00	0.00	0.00	0.00

Time Sheets

Expenses

Accounts

Customers

Vendors

Employees

Banking

Assignments

Workers Compensation

The Employee will appear in the **Customer Candidates** section.

Customer Contacts				Add Contact	Select CRM Contact
Contact Name	Title	Contact Type	Phone Number		
Kyle Rajaniemi	Field Marketing Representative		855-688-7269	Edit	Delete
Customer Candidates*					
Candidate Name	Tax Type	Email Id		Add Candidate	
Robert Altman	C-to-C	Robert.Altman@nyumc.org	Edit	Delete	
Jon Treadmill	C-to-C	dsardella@akkencloud.com	Edit	Delete	