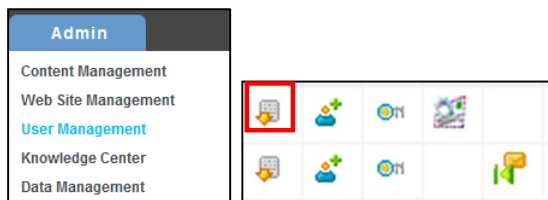


New AkkenCloud Features - April 10th, 2017

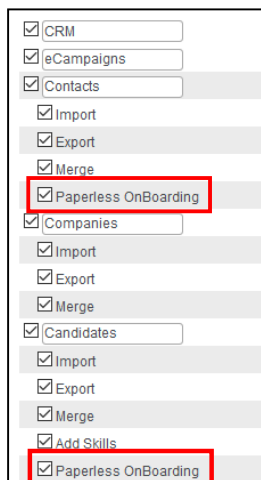
POB in Candidates and Contacts

We've introduced the ability to initiate Paperless OnBoarding documents from CRM > Candidates and Contacts. This feature is beneficial if, for example, you need to send pre-screening documents to Candidates to capture information before they are hired.

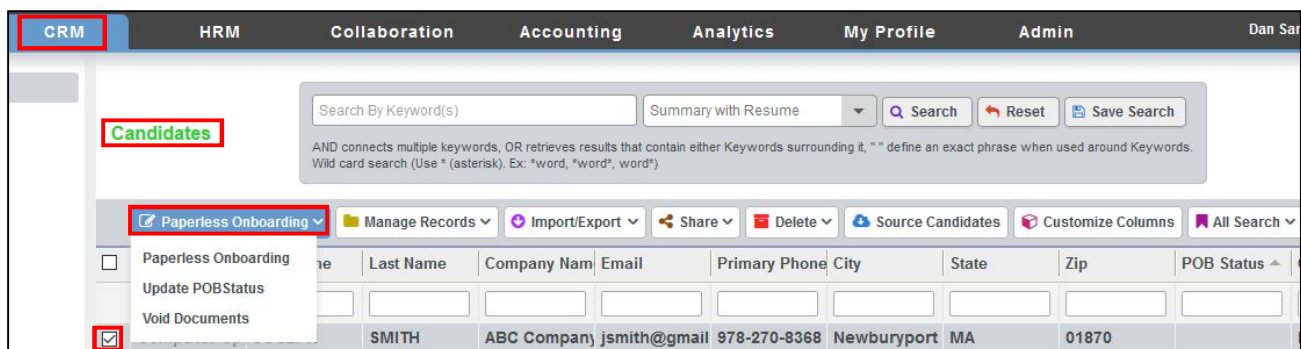
An AkkenCloud user will first need to be setup with a user account in **Admin > POB Management**, per the existing process. *Once that is setup*, to grant an AkkenCloud user the ability to send POB documents from the CRM, go to **Admin > User Management** and select the first icon (**Preferences**) for the user.



Select **Paperless OnBoarding** for Contacts and/or Candidates and click **'Update'**.



From **CRM > Candidates** or **Contacts**, check the box next to the Candidate or Contact's name that you would like to send documents to and click **Paperless OnBoarding**.



Next select the documents you would like to send to the Candidate or Contact and click on 'Next'. You have the ability view each document prior to sending by clicking on 'Preview'.

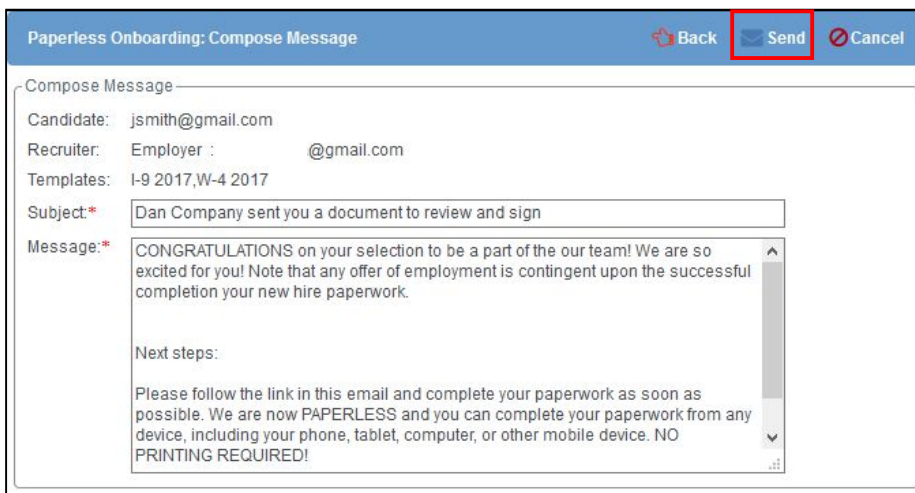


If you have multiple signers, you will need to select additional signers here and click on 'Next'.



Role Name	Signer Info	Order
Candidate :	1 selected	1
Employer :	Select Signee ▾	2

Click 'Send'.

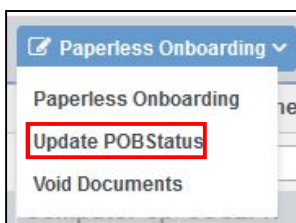


Compose Message

Candidate: jsmith@gmail.com
 Recruiter: Employer : @gmail.com
 Templates: I-9 2017,W-4 2017
 Subject*: Dan Company sent you a document to review and sign
 Message*: CONGRATULATIONS on your selection to be a part of our team! We are so excited for you! Note that any offer of employment is contingent upon the successful completion of your new hire paperwork.

Next steps:
 Please follow the link in this email and complete your paperwork as soon as possible. We are now PAPERLESS and you can complete your paperwork from any device, including your phone, tablet, computer, or other mobile device. NO PRINTING REQUIRED!

You can track the progress of the documents at any time within AkkenCloud. Select up to 10 records and click on 'Update POB Status' from the Paperless OnBoarding drop-down.



The current POB status will be displayed in the **POB Status** column. You can sort and filter information in this column. POB statuses are as follows: Sent, Completed, Declined, Voided, Autoresponded, Fax Pending, Created and Delivered.

Profile Title	First Name	Last Name	Company Name	Email	Primary Phone	City	State	Zip	POB Status	Candidate Type
Computer Spec	JOSEPH	SMITH	ABC Company	jsmith@gmail.c	978-270-8368	Newburyport	MA	01870	Sent	Employee
Sales - Outside	Aaron	Dobson		fakeemail@ya	895-325-4569	Tampa	FL	33625	Sent	Employee
Scientist	Jamese	Hilliard	MEDIMMUNE, I	jamese.hilliard	908 283.4816	Atlantic City	NJ		Sent	Employee

To view more information on the POB Status, click on the status hyperlink.

S.No.	Log Time	User Name	Action	Message	Envelope Status	Information	Document Name
1	2017-04-04T21:15:20.6999879Z	Dan Sardella	Printable Copy Delivered	Dan Sardella received a printable copy of the envelope	sent		I-9_2017.pdf, W4 2017.pdf
2	2017-04-04T21:15:18.9932757Z	Dan Sardella	Sent Invitations	Dan Sardella sent an invitation to JOSEPH SMITH [jsmith@gmail.com Employee]	sent	JOSEPH SMITH [jsmith@gmail.com Employee]	I-9_2017.pdf, W4 2017.pdf
3	2017-04-04T21:15:18.1182890Z	Dan Sardella	Registered	The envelope was created by Dan Sardella	created		I-9_2017.pdf, W4 2017.pdf

All POB documents sent will display in the **Documents** and **Activities** sections of Candidate and Contact records.

Date	By	Title	Type
04/04/2017 05:15 pm	Dan Sardella	I-9_2017....	Document
04/04/2017 05:15 pm	Dan Sardella	W4 2017.pd...	Document

Date	Created By	Name	Title
04/04/2017 05:15 pm	Dan Sardella	I-9_2017.pdf	I-9_2017....
04/04/2017 05:15 pm	Dan Sardella	W4 2017.pdf	W4 2017.pd...

From **All Activities**, you can view the documents by clicking on the **'Download'** or **'Preview'** icons. You can also see the complete history by clicking on **'POB History'**.

Modified Date	User	Title	Type	Sub-Type	Attachments	Download	Preview
04/04/2017 05	Dan Sardella	I-9_2017.pdf	Document	SENT-POB DOCUMENTS			
04/04/2017 05	Dan Sardella	W4 2017.pdf	Document	SENT-POB DOCUMENTS			

When a Candidate is moved to **HRM > Hiring Management**, the HR data captured up to that point will auto populate on the **Employee** record.

Resend POB Documents

We've added the ability to resend "Completed" Paperless OnBoarding documents from either **CRM** or **HRM**. Now when you need to update, for example, W-4 or Direct Deposit info, you can send the POB forms to your **Employees**, even if their **POB Status** is "Completed."

From **HRM > Hiring Management**, **HRM > Employee Management**, **CRM > Candidates** or **CRM > Contacts**, select a record to resend POB documents and click **Paperless OnBoarding**.

eDesk											
CRM		HRM		Collaboration		Accounting		Analytics		My Profile	
Employee Management											
<input checked="" type="checkbox"/> Paperless OnBoarding <input type="checkbox"/> Approvals <input type="checkbox"/> Export <input type="checkbox"/> Send Mail <input type="checkbox"/> Delete <input type="checkbox"/> New Employee											
<input type="checkbox"/>	First Name	Last Name	Employee ID	SSN	Phone	Email	Job Status	Type	Status	POB Status	
<input type="checkbox"/>	Adam	Apple	111			nouser	All	All	All	Sent	
<input type="checkbox"/>	Adrian	Krutz	131	XXX-XX-2154		chandr	All	All	All	Completed	
<input checked="" type="checkbox"/>	Allen	Paul	181	XXX-XX-2000		chandr	All	All	All	Completed	

You'll now be able to *resend* documents in the following POB Statuses: "Completed", "Declined", "Fax Pending" (removing the previous restriction).

If the **POB Status** was "Completed", it will update to "Sent", after resending the documents.

eDesk											
CRM		HRM		Collaboration		Accounting		Analytics		My Profile	
Employee Management											
<input checked="" type="checkbox"/> Paperless OnBoarding <input type="checkbox"/> Approvals <input type="checkbox"/> Export <input type="checkbox"/> Send Mail <input type="checkbox"/> Delete <input type="checkbox"/> New Employee											
<input type="checkbox"/>	First Name	Last Name	Employee ID	SSN	Phone	Email	Job Status	Type	Status	POB Status	
<input type="checkbox"/>	Adam	Apple	111			nouser	All	All	All	Sent	
<input type="checkbox"/>	Adrian	Krutz	131	XXX-XX-2154		chandr	All	All	All	Completed	
<input type="checkbox"/>	Allen	Paul	181	XXX-XX-2000		chandr	All	All	All	Sent	

To view more information on the POB Status, click on the status hyperlink. Any documents "Completed" will continue to display with date and timestamps. Resent documentation will appear "Sent", as the latest activity.

POB Activity History - Allen Paul								Close
S.No.	Log Time	User Name	Action	Message	Envelope Status	Information	Document Name	
Envelope Id : 15823dd8-3f38-4e5e-a789-e46307a48d06								Sent
1	2017-04-06T19:02:23.1960772Z	Jess O'Malley	Printable Copy Delivered	Jess O'Malley received a printable copy of the envelope	Sent		I-9_28JAN 21 20.pdf	
2	2017-04-06T19:02:21.3344373Z	Jess O'Malley	Sent Invitations	Jess O'Malley sent an invitation to Allen Paul [.com Employee]	Sent	Allen Paul Employee)	I-9_28JAN 21 20.pdf	
3	2017-04-06T19:02:20.6000600Z	Jess O'Malley	Registered	The envelope was created by Jess O'Malley	Created		I-9_28JAN 21 20.pdf	
Envelope Id : 777493f4-9342-4804-a2cd-865c31b056bd								Completed
1	2017-03-23T11:05:19.7208651Z	Melissa Connor	Printable Copy Delivered	Melissa Connor received a printable copy of the envelope	Completed		Geetha Aradhyula.pdf	
2	2017-03-23T11:05:08.8096557Z	Cal Ripken Jr.	Printable Copy Attached to Email	Cal Ripken Jr. was sent the document (Geetha Aradhyula.pdf) attached to the completed email	Completed	(Geetha Aradhyula.pdf)	Geetha Aradhyula.pdf	
3	2017-03-23T11:05:08.7783967Z	Cal Ripken Jr.	Printable Copy Attached to Email	Cal Ripken Jr. was sent the document (Geetha Aradhyula.pdf) attached to the completed email	Completed	(Geetha Aradhyula.pdf)	Geetha Aradhyula.pdf	

From **Activities** tab (in **HRM**) or **All Activities** (in **CRM**), you can view the documents by clicking on the **'Download'** or **'Preview'** icons. You can also see the complete history by clicking on **'POB History'**.

Allen Paul

Profile Data | HR Data | Resume | **Activities**

Employee Management | **POB History** | Add Event | Add Document | Create Task | Create Appointment | Send Mail | Close

Modified Date	User	Title	Type	Sub-Type	Attachments	Download	Preview	Search	Reset
04/06/2017 03:	Jess O'Malley	I-9 _28JAN 21 :	Document	SENT-POB DO					
04/06/2017 03:	Jess O'Malley	John Duris Co	Received Mail						
03/23/2017 07:	Melissa Conno	Geetha Aradhy	Document	COMPLETED-I					
03/23/2017 07:	Melissa Conno	Geetha Aradhy	Document	COMPLETED-I					
03/23/2017 07:	Melissa Conno	Geetha Aradhy	Document	SENT-POB DO					
03/23/2017 07:	Melissa Conno	Geetha Aradhy	Document	SENT-POB DO					
03/23/2017 07:	Melissa Conno	John Duris Co	Received Mail						
03/22/2017 10:	Melissa Conno	Geetha Aradhy	Document	COMPLETED-I					
03/22/2017 10:	Melissa Conno	Geetha Aradhy	Document	SENT-POB DO					
03/22/2017 10:	Melissa Conno	John Duris Co	Received Mail						

Showing records 1 to 10 of 10 Show 50 Records << Page 1 of 1 >>

Employee Management | **POB History** | Add Event | Add Document | Create Task | Create Appointment | Send Mail | Close

AOB Notifications

With this enhancement, we've added the ability for selected AkkenCloud users to be notified when a new Applicant Tracking record is created using Applicant OnBoarding forms. Now when an applicant submits AOB forms and a record is created, users can be notified via email, text and/or pop-up message. This also takes into account when applicant records are updated with AOB forms using the static link.

The AkkenCloud account must be setup with Applicant OnBoarding and have custom application forms (**Form Group(s)**) programmed in **Admin > Applicant OnBoarding**.

eDesk | CRM | HRM | Collaboration | Accounting | Analytics | My Profile | **Admin** | Jess O'Malley

Applicant On-Boarding (AOB)

Click on "View Forms" to View an existing Form or Add a new Form.
Click on "Create Form Group" to assign forms to a new group or to an existing group.
Form Groups which are in use on any Job Order or Job Posting, such Form Groups are disabled in below grid.

Set AOB Preferences | View Forms | Create Form Group | Activate | Deactivate | Delete

Form Group	Default First Fc	Status	Created By	Created Date	Modified By	Modified Date	
<input type="checkbox"/> Memorandum Quick Form	All	Active	John Duris	12/20/2016 06:	John Duris	12/20/2016 06:	View Web Form Copy Web Form URL
<input type="checkbox"/> Memorandum Long Form	All	Active	John Duris	12/16/2016 09:	John Duris	12/16/2016 09:	View Web Form Copy Web Form URL
<input type="checkbox"/> Quick Form		Active	System	06/27/2016 02:	System	06/27/2016 02:	
<input type="checkbox"/> Long Form		Active	System	06/27/2016 02:	System	06/27/2016 02:	

Showing records 1 to 4 of 4 Show 50 Records << Page 1 of 1 >>

Set AOB Preferences | View Forms | Create Form Group | Activate | Deactivate | Delete

In order to setup AOB Notifications, Admin user will need to have access to **Admin > Notification Management** (granted from **Admin > User Management > Preferences**).

From **Admin > Notification Management**, select the checkbox for **AOB Notification**.

The screenshot shows the 'Notifications Management' page with the 'Admin' menu open. The 'AOB Notification' checkbox is checked and highlighted. The 'Mode of Notification' section includes checkboxes for Email, SMS, and Popup. The 'Notify To' section includes checkboxes for Roles, Owner, and Employees (Internal Direct). A note below states: 'Note: Selected Employee(s) (Internal Direct Only) will get an email notification when an Applicant Tracking record is created with AOB forms.'

Choose the **Mode of Notification (Email, SMS and/or Popup)** and in the **Notify To** section select the checkbox next **Employees (Internal Direct)**. Next click **Add/Remove**.

This close-up shows the 'AOB Notification' settings. The 'Mode of Notification' section has checkboxes for Email, SMS, and Popup. The 'Notify To' section has the 'Employees (Internal Direct)' checkbox checked. The 'Add/Remove' button is highlighted with a red box.

Select Employee(s) from the **Available User(s)**, click **Add** and then **Select**.

The screenshot shows a user selection dialog. The 'Available User(s)' list on the left contains names like Anthony Gaudette, Barbara Taft, Cal Ripken Jr., Gary Bryant, Jess O'Malley, John Duris, Kathy Parsons, Marty Barrett, Mary Higgins, and Melissa Connor. The 'Selected User(s)' list on the right contains 'Jacoby Elsbury'. The 'Add' button is highlighted with a red box.

Back on the **Notifications Management** screen, be sure to click **'Update.'**

This close-up shows the 'Update' button in the 'Notifications Management' interface, highlighted with a red box.

Once an applicant submits the custom application to a job, either via your jobs subdomain (ex: jobs.yourdomain.com) or via a static URL (using the **Copy Web Form URL** from **Admin > Applicant OnBoarding**), then the applicant details will be displayed in **HRM > Applicant Tracking**.

The AOB Notification (Email, SMS and/or Popup) will be sent to the Akken user(s) if the **Source** is one of the AOB Form Groups programmed in **Admin > Applicant OnBoarding** and the **Source Type** is “**Website**” as shown below.

eDesk CRM HRM Collaboration Accounting Analytics My Profile Admin										
Applicant Tracking										
<input type="button" value="New"/> <input type="button" value="Merge Records"/> <input type="button" value="Export"/> <input type="button" value="Import"/> <input type="button" value="Add to CRM"/> <input type="button" value="Delete"/> <input type="button" value="Forward to Hiring Management"/>										
Candidate Name	Phone	Email ID	City	State	Applied To	Availability	Stages	Source	Source Type	SSN
<input type="checkbox"/>						All	All			
<input type="checkbox"/>	Cary M Smith	34634763476	mounika.p@akkente		UI Engr	Immediate	Pipeline	Equal Employment short	Website	
<input type="checkbox"/>	Jamie M Smith	46436246	mounika.p@akkente		UI Engr	Immediate	Pipeline	Equal Employment short	Website	
<input type="checkbox"/>	Tim M Cook	36473573	mounika.p@akkente		UI Engr	Immediate	Pipeline	Equal Employment short	Website	
<input type="checkbox"/>	Debu M Patty	3476347347	mounika.p@akkente		Qa Lead	Immediate	Pipeline	Equal Employment short	Website	

Job Order owners will continue to get notifications that an applicant has applied, as per the current functionality. With this new enhancement, the user(s) selected in **Admin > Notification Management > AOB Notification** will also receive a notification.

Example of an email that an AkkenCloud user will receive upon an applicant applying to a **job via your jobs subdomain**, using a custom application form:

Date :	Fri, 31 Mar 2017 08:45:02 -0400
From :	Akken Notifications <donot-reply@akken.com>
To :	t@akkentech.com
Cc :	
Subject :	A New Candidate has Applied for UI Engr using Equal Employment short AOB Form Group
<p>This is an automated e-mail notification that a New Candidate, (Tammy Hudson) has Applied for the UI Engr using Equal Employment short AOB Form Group. You can review the Candidates profile in HRM / Applicant Tracking section of your Akken Staffing Application.</p>	

Example of an email that an AkkenCloud user will receive upon an applicant applying to a **job via static link**, using a custom application form:

Date :	Fri, 31 Mar 2017 08:45:02 -0400
From :	Akken Notifications <donot-reply@akken.com>
To :	@akkentech.com
Cc :	
Subject :	A New Candidate has Applied using Group Test AOB Form Group
<p>This is an automated e-mail notification that a New Candidate, (John K) has Applied using Group Test AOB Form Group. You can review the Candidates profile in HRM / Applicant Tracking section of your Akken Staffing Application.</p>	

AkkenCloud users will be notified when the Applicant Tracking record is updated (when the same Applicant with the same primary email ID applies using a static link). The format is the same as shown above.