



akuiteo
BUSINESS SOFTWARE

User Guide
WEB PORTAL
Version 4.3

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1 Preface

1.1 REVISIONS

Revision 3	Published in July 2020 <ul style="list-style-type: none">• No longer compatible with the Internet Explorer web browser.
Revision 2	Published in July 2020 <ul style="list-style-type: none">• Modified the process to add external guests (see Expense reports (p. 24)).• Added time completion of both the week and the month for the last week of a month (see Completing timesheets (p. 17)).
Revision 1	Published in November 2019 <ul style="list-style-type: none">• Complete update of the Expense reports (p. 24) chapter.• Added expense report approvals.• Added the following paragraphs:<ul style="list-style-type: none">◦ Denying expenses in an expense report (p. 74)◦ Modifying expenses in an expense report (p. 74)◦ Sending emails to the employee requesting the approval (p. 75)◦ Viewing linked documents (p. 75)

1.2 HELP DESK

Akuiteo S.A.S. highly values your satisfaction.

To share your feedback or contact the help desk, feel free to visit our website page:

<https://www.akuiteo.fr/akuiteo.clients/>

2 Introduction to the Web Portal

The Web Portal is a secured portal that enables users to carry out different actions depending on their rights. For example, employees can make leave requests, sales people can manage opportunity pipelines and managers can validate the timesheets of their employees. The portal also enables different user profiles to access specific Akuiteo features from a web browser, without having to open the Application Desktop.

The portal is divided into four modules:

- The [Employee module \(p. 12\)](#) enables all employees to enter their time spent and to create schedules, custom requests as well as expense reports.
- The [CRM module \(p. 43\)](#) enables sales people to manage their opportunities and the signature schedule, to view their address book (contacts, prospects and customers) and to manage their to-do list of actions.
- The [Manager module \(p. 66\)](#) enables managers or designated employees to validate leave requests, custom requests and expense reports, to approve management objects or even to review timesheets.
- The [Reports module \(p. 83\)](#) enables designated employees to generate and publish reports.

Important

The portal is compatible with the following browsers: Chrome, Safari, Firefox and Microsoft Edge.

3 Accessing the portal

Tip


At any time, click on the connected user's name in the portal's header then on **Clear cache** to clear the history and take into account new rights for example. You can also click on **Reset custom controls** to take into account the controls newly set up for the portal.

3.1 LOGGING IN

- 1 In a web browser, enter the portal's website address of the following type:
`https://domainname/servername/...`

Example

`https://www.akuiteo.com/akuiteo.collabs/login/login.html`

- 2 In the login window, select the portal's language from the drop-down list. Since the login credentials are reset when a new language is selected, the language should be selected first.
- 3 Fill in the **Login** and the **Password**.
- 4 Click on **Log in**.
 The web portal opens. The left menu contains the **Employee**, **CRM**, **Manager** and **Reports** modules.


Tip

Did you forget your password? In the login window, fill in the **Login** and click **Forgot your password?**, then confirm the password reset. An email will be sent so that you modify your login credentials.

3.2 CHANGING THE PASSWORD

Note

Users connecting via LDAP cannot modify their password from the portal.

- 1 In the portal's header, click on the connected user's name then click **Password**.
 The **Change password** screen opens.
- 2 Fill in the **Old password**, then fill in the **New password**. Fill in the new password a second time in the **Confirm password** field.
- 3 Click **Validate**.

↪ The password is changed. Next time you log in, you will use the new password.

3.3 CHANGING THE LANGUAGE

To change the portal's language, click on the connected user's name in the header, then hover over the **Language** field and select the desired language. The portal is automatically refreshed to be displayed in the selected language, without having to log out.

Reference

All the portal's labels can be modified or translated into another language. For more information, refer to the *Web Portal Setup guide*.

3.4 LOGGING OUT

To log out from the portal, click on the connected user's name in the header, then click **Log out**.

Employee module

The **Employee** module of the Web Portal enables employees to quickly achieve their daily tasks with the help of a simplified interface. Employees can manage their calendars and their timesheets, create expense reports, request some days off or even manage custom requests.

The **Employee** module can be accessed by all profiles of employees in a company.

[Timesheets \(p. 13\)](#)

Timesheets enable employees to log in their daily activity and to spread out their calendars depending on their different tasks and different projects. When employees enter their time, they indicate they have spent a certain number of hours or days on a specific project. [...]

[Schedules \(p. 19\)](#)

Schedules enable employees to organize their work days in advance and to plan their calendars. For example, consultants can use schedules to organize their weeks depending on their customers or developers can plan their maintenance days in advance to better organize their week. Schedules make it possible to view the tasks planned for one or multiple projects or can be used to check an employee's workload. [...]

[Expense reports \(p. 24\)](#)

An employee that has to make business expenses must create expense reports in order to be refunded by the company. This employee must add each expense made as well as all the information required by the company. [...]

[Leave requests \(p. 34\)](#)

An employee acquires different types of leave days when working for a company: paid leaves, additional rest days, maternity/paternity leaves, and so on. The number of days depends on the employee's work contract as well as on the policies implemented by the company. These leave counters are available in the portal so employees can quickly and easily send leave requests to their managers, or any person in charge of validating these requests. [...]

[Custom requests \(p. 38\)](#)

Custom requests enable employees to create specific requests depending on each company's needs. For example, a company can create a category of custom request so that employees can request days to work remotely, to travel for work or even to make a purchase request. Each company can use as many custom request categories as needed to manage its internal processes. [...]

4 Timesheets

Timesheets enable employees to log in their daily activity and to spread out their calendars depending on their different tasks and different projects. When employees enter their time, they indicate they have spent a certain number of hours or days on a specific project.

Timesheets can be used to check the time that have actually been spent by an employee, to analyze the workload depending on the desired criteria (by customer, by project, and so on) or even to follow the time spent on each project.

Quick entries can be used to add time quickly and easily. A quick entry is a template created from a time block so that it has the same information. Then, employees only have to change the values that are different to create their new time blocks, instead of having to fill in the same information over and over again.

Employees can modify their timesheets at any time, as long as they have not completed them yet. The action of completing a timesheet locks the time blocks so that they can no longer be modified by the employee and transfers the timesheet to the manager for validation.

Timesheets can be managed from two menus in the **Employee** module:

- the **Timesheets & schedules** menu, which displays time blocks in a calendar;
- the **Activity overview** menu, which displays time lines as a detailed table.




The timesheets are managed in the same way than the schedules. However, time blocks represent blocks of working time that the employee has actually done whereas schedules are used to plan the work days of an employee in advance.

4.1 CREATING TIMESHEETS












Timesheets can be created:

- [From an empty time block \(p. 13\)](#) ;
- [From a quick entry \(p. 15\)](#), to automatically retrieve all the fields specified in a time block and only modify the desired values;
- [By duplicating existing time entries \(p. 15\)](#).

4.1.1 From an empty time block

- 1 From the **Times & schedules** or **Activity overview** menus, display the desired day:
 - Click on **Today** to display today's date directly, or on the arrows to navigate to the desired day.
 - Select the **Month**, **Week** or **Day** display. For the month display in the calendar, time blocks cannot be created directly for a specific day because the  icon is not displayed.
- 2 Click on  in the calendar to find the desired day or click on **New** in the **Actions** section of the right panel.
 The time window opens.

- 3** In the time window, make sure the **Time** tab is selected, then fill in the following fields for the work done:

Field	Description
	<p>The date is determined by default depending on the method used:</p> <ul style="list-style-type: none"> • If you clicked on  for a specific day, this day will be filled in. • If you clicked on New, the day filled in will be the first day of the month, of the week or even the relevant day, depending on the selected display (Month, Week or Day). <p>If needed, click on the field to display a calendar and modify the date specified.</p>
	Fill in the first letters of the desired customer. The help list is displayed automatically with the relevant customers. Select the desired customer from the help list.
	<p>Select the project from the help list. If the selected customer only has one project, it is filled in automatically.</p> <p>If the DMFs 190110 to 190118 are active, click on  to define the filters to be applied for projects.</p>
Phase	Select the phase from the help list. If the selected project only has one phase, it is filled in automatically.
Sub-phase	Select the sub-phase from the help list. If the selected phase only has one sub-phase, it is filled in automatically.
Task	<p>Select the task from the help list. If the selected phase only has one task, it is filled in automatically.</p> <p>Click on  to open a window that includes the following information for the selected task, phase, sub-phase and project:</p> <ul style="list-style-type: none"> • Cost: read on the item • Timesheet: sum of all the time spent on the item • Scheduled: sum of all the schedules on the item • Difference = Cost - Timesheet - Scheduled
 and 	<p>Select the actions 1 and 2 from the help list.</p> <p>Depending on the setup, the action 2 can be optional and therefore not displayed.</p>
	To fill in the duration, enter a value in the field or click on the wheel to select the desired duration.
	Fill in the location.
	Enter a comment to give more details about the work done.


- 4** Click **Validate**.

↳ A blue-colored block is created in the calendar for the date specified. This block is the time specified. The time is also displayed as a line in the **Activity overview** menu.

4.1.2 From a quick entry

Note

This process explains how to create time blocks using quick entries. For details about creating quick entries, refer to [Managing quick entries \(p. 16\)](#).


- 1 From the **Times & schedules** or **Activity overview** menus, display the desired day:
 - Click on **Today** to display today's date directly, or on the arrows to navigate to the desired day.
 - Select the **Month**, **Week** or **Day** display.
- 2 From the right panel, display the **Quick entries** section.
- 3 Click on the desired quick entry, then drag and drop it on the desired day.
 A blue-colored block is created in the calendar for the desired day. This block is the time created using the quick entry. If needed, modify this time block to adapt the values that were automatically filled in. The time is also displayed as a line in the **Activity overview** menu.


4.1.3 By duplicating existing time entries

Time block

An existing time block can be duplicated to quickly create a new block.


There are two ways to duplicate a time block from the **Timesheets & schedules** menu:

- Select a time block while pressing the CTRL key, then move the block to the desired day.
- Click on the block to open the **Timesheet** toolbar then click on . Modify the desired information in the time window then click **Validate** to create the new time block.

From the **Activity overview** menu, click on **...** in the **Actions** column for the line to be duplicated, then click on . Modify the desired information in the time window then click **Validate** to create the new time line.

Entire week

It is also possible to duplicate the timesheet of an entire week. Leave days are not taken into account during the duplication. When duplicating a timesheet for an entire week, the time blocks that were already added to the targeted week will be replaced.

- 1 From the **Timesheets & schedules** or **Activity overview** menus, display the week to be duplicated (**Week** display).
- 2 From the **Actions** section of the right panel, click **Duplicate week's timesheet**.
- 3 Fill in the number of weeks concerned by the duplication. For example, if you fill in 3 weeks, the reference week will be duplicated for the next three weeks.
- 4 Click **Validate**.
 The timesheet of the reference week is duplicated for the specified number of following weeks.

4.2 MODIFYING TIMESHEETS

4.2.1 From the **Timesheets & schedules** menu

To modify a time block, click on it to open the **Timesheet** toolbar then click on .

To add or remove 15 minutes to the duration of the time block, click on the block to open the **Timesheet** toolbar, then click on **- 15** or **+ 15**.

If you want to move a block from one day to another, drag and drop the block to the desired day.

If you want to quickly modify the duration of a block, select the upper or lower border of the block, then move the cursor towards the top or the bottom. The duration is directly modified.

To cancel the validation of a block, click on it to open the **Timesheet** toolbar then click on .

4.2.2 From the **Activity overview** menu

To modify a time line, click on  for the desired line.

To cancel the validation of a line, click on **...** in the **Actions** column for the line, then click on .

4.3 PUBLISHING TIMESHEETS

To publish timesheets, you must previously set up report templates for timesheets.

- 1 From the **Timesheets & schedules** or **Activity overview** menus, open the right panel.
- 2 Click on **Publish timesheet** in the **Actions** section.
- 3 Depending on the setup, the **Publishing setup** window can open. Fill in the fields then click **Download**.

↳ The timesheet is published and saved on your computer.

4.4 MANAGING QUICK ENTRIES

To create a quick entry:

- 1 From the **Timesheets & schedules** or **Activity overview** menus, locate the desired time block for creating the quick entry.
- 2 Open the **Quick entries** section in the right panel.
- 3 Drag and drop the desired block to the **Drag and drop new quick entry here** frame, in the **Quick entries** section.

Important


Before dropping the block, make sure the frame's border is displayed as a dotted line. Otherwise, the quick entry will not be created.

↳ The **New quick entry** window opens. The information specified in the selected block is automatically retrieved for the window's fields.

- 4 Fill in the label for the quick entry. This label cannot be modified once the quick entry is created. To modify the label of an existing quick entry, you must delete it and then create a new quick entry with the correct label.
- 5 Modify the necessary fields. The values filled in will be retrieved automatically and identically when using this quick entry to create new time blocks.
- 6 Click **Validate**.

↳ The quick entry is created and is available in the **Quick entries** section of the right panel.

To delete a quick entry:

- 1 From the **Timesheets & schedules** or **Activity overview** menus, locate the desired quick entry in the **Quick entries** section of the right panel.
- 2 Hover over the quick entry, then click on .
- 3 Confirm the deletion.

↳ The quick entry is deleted.

Reference

For more information about creating time blocks using quick entries, refer to [From a quick entry \(p. 15\)](#).

4.5 COMPLETING TIMESHEETS

Once employees have finished entering their time for the week or the month, they must complete their timesheet so it is transferred to the relevant manager for validation.

Completing a timesheet can be done weekly or monthly depending on the processes set up by your company. Before completing your timesheet, make sure it is finished and it complies with the rules provided by your company. Timesheets are checked before they are completed. If some time entries are incomplete or incorrect, it will be impossible to complete the timesheet.

If you need to modify completed time entries, ask your manager to cancel the completion of the timesheet. Once the changes are made, you will have to complete this timesheet again.

- 1 From the **Timesheets & schedules** or **Activity overview** menus, open the **Actions** section in the right panel.
- 2 Click **Complete week** or **Complete month**.

3 Click **Validate** to confirm the completion.

↳ The timesheet is completed and can no longer be modified. Completed time entries are displayed with a lock icon.




Note

If the **SEMAINE_MOIS** value is specified in the **TPS_TERMINAISON** management rule, for the last week of the month the employee can complete both the week's and the month's timesheet.

4.6 SHOWING THE LIST OF TIME ENTRIES

The **Activity overview** menu displays timesheets and schedules as a detailed table. This menu enables employees to quickly see the timesheets and schedules added for the month, the week or the day, mainly if an employee has a lot of different lines.

The features available from the **Timesheets & schedules** menu can also be found in the **Activity overview** menu. The following features are also available using the three icons available at the bottom of the **Activity overview** screen:

- : Export the table of time and schedule lines in Excel format. The export matches the date displayed on the screen and the selected **Month / Week / Day** display.
- : Manage the columns displayed in the table and how they are ordered.
- : Update the table.


4.7 DELETING TIMESHEETS


Important

Deleting timesheets cannot be reversed.

Note

Completed or validated timesheets cannot be deleted.

From the **Timesheets & schedules** menu, click on the block to open the **Timesheet** toolbar, then click on  and confirm the deletion.

From the **Activity overview** menu, click on "" in the **Actions** column for the time line, then click on  and confirm the deletion.

5 Schedules

Schedules enable employees to organize their work days in advance and to plan their calendars. For example, consultants can use schedules to organize their weeks depending on their customers or developers can plan their maintenance days in advance to better organize their week. Schedules make it possible to view the tasks planned for one or multiple projects or can be used to check an employee's workload.

Employees can modify their schedules at any time until they are transferred into timesheets. This way, a schedule block can be converted into a time block and the employee does not need to enter this time separately.

Schedules can be managed from two menus in the **Employee** module:

- the **Timesheets & schedules** menu, which displays schedules in a calendar;
- the **Activity overview** menu, which displays schedules as a detailed table.




The timesheets are managed in the same way than the schedules. However, time blocks represent blocks of working time that the employee has actually done whereas schedules are used to plan the work days of an employee in advance.



5.1 CREATING SCHEDULES











Schedules can be created:

- [From an empty schedule block \(p. 19\)](#) ;
- [By duplicating an existing schedule \(p. 20\)](#).

5.1.1 From an empty schedule block

- 1 From the **Timesheets & schedules** or **Activity overview** menus, display the desired day:
 - Click on **Today** to display today's date directly, or on the arrows to navigate to the desired day.
 - Select the **Month**, **Week** or **Day** display. For the month display in the calendar, schedules cannot be created directly for a specific day because the  icon is not displayed.
- 2 Click on  in the calendar to find the desired day or click on **New** in the **Actions** section of the right panel.
 The schedule window opens.
- 3 In the schedule window, make sure the **Schedule** tab is selected, then fill in the following fields for the planned work:

Field	Description
	The date is determined by default depending on the method used: <ul style="list-style-type: none">• If you clicked on  for a specific day, this day will be filled in.

Field	Description
	<ul style="list-style-type: none"> If you clicked on New, the day filled in will be the first day of the month, of the week or even the relevant day, depending on the selected display (Month, Week or Day). <p>If needed, click on the field to display a calendar and modify the date specified.</p>
	<p>Select the schedule block's position in the day from the drop-down list.</p> <p>The work day is divided in quarters. For example, if you select First quarter of the day, the schedule block will be positioned at the beginning of the day.</p>
	Fill in the first letters of the desired customer. The help list is displayed automatically with the relevant customers. Select the desired customer from the help list.
	<p>Select the project from the help list. If the selected customer only has one project, it is filled in automatically.</p> <p>If the DMFs 190110 to 190118 are active, click on  to define the filters to be applied for projects.</p>
<i>Phase</i>	Select the phase from the help list. If the selected project only has one phase, it is filled in automatically.
<i>Sub-phase</i>	Select the sub-phase from the help list. If the selected phase only has one sub-phase, it is filled in automatically.
<i>Task</i>	<p>Select the task from the help list. If the selected phase only has one task, it is filled in automatically.</p> <p>Click on  to open a window that includes the following information for the selected task, phase, sub-phase and project:</p> <ul style="list-style-type: none"> Cost: read on the item Timesheet: sum of all the time spent on the item Scheduled: sum of all the schedules on the item Difference = Cost - Timesheet - Scheduled
	Select the action from the help list.
	To fill in the duration, enter a value in the field or click on the wheel to select the desired duration. It is possible to fill in a duration from 0.25 to 1 day.
	Fill in the location.
	Enter a comment to give more details about the planned work.
	Enter an additional description for the schedule block.


4 Click **Validate**.


↪ A red-colored block is created in the calendar for the date specified. This block is the schedule specified. The schedule is also displayed as a line in the **Activity overview** menu.

5.1.2 By duplicating an existing schedule

An existing schedule block can be duplicated to quickly create a new schedule.


There are two ways to duplicate a schedule block from the **Timesheets & schedules** menu:

- Select a schedule block while pressing the CTRL key, then move the block to the desired day.
- Click on the block to open the **Schedule** toolbar then click on . Modify the desired information in the schedule window then click **Validate** to create the new schedule block.

From the **Activity overview** menu, click on "" in the **Actions** column for the line to be duplicated, then click on . Modify the desired information in the schedule window then click **Validate** to create the new schedule line.


5.2 MODIFYING SCHEDULES

5.2.1 From the **Timesheets & schedules** menu

To modify a schedule block, click on it to open the **Schedule** toolbar then click on .


If you want to move a block from one day to another, drag and drop the block to the desired day.

If you want to quickly modify the duration of a block, select the upper or lower border of the block, then move the cursor towards the top or the bottom. The duration is directly modified.

To validate a schedule block or cancel its validation, click on the block to open the **Schedule** toolbar then click on . Validating a schedule enables employees to differentiate the scheduled work that is validated from the one that is not. A validated schedule block can no longer be modified.

5.2.2 From the **Activity overview** menu

To modify a schedule line, click on  for the desired line.

To validate a schedule line or cancel its validation, click on "" in the **Actions** column for the line then click on . Validating a schedule enables employees to differentiate the scheduled work that is validated from the one that is not. A validated schedule line can no longer be modified.

5.3 PUBLISHING SCHEDULES

To publish a schedule, you must previously set up report templates for expense reports.

- 1 From the **Timesheets & schedules** or **Activity overview** menus, open the right panel.
- 2 Click on **Publish schedule** in the **Actions** section.
- 3 Depending on the setup, the **Publishing setup** window can open. Fill in the fields then click **Download**.


↳ The schedule is published and saved on your computer.


5.4 TRANSFERRING SCHEDULES INTO TIMESHEETS

Schedules can be transferred into timesheets so that all the information is retrieved without having to

manually add it to the timesheets. Depending on the daily contractual period, the schedule is converted from percentage to hours and minutes.


Schedule block

From the **Timesheets & schedules** menu, click on the block to open the **Schedule** toolbar, then click on . The schedule block is converted into a time block.

From the **Activity overview** menu, click on "" in the **Actions** column for the line to be transferred, then click on . The schedule line is converted into a time line.

Entire week




It is also possible to transfer the schedules of an entire week into a timesheet.

- 1 From the **Timesheets & schedules** or **Activity overview** menus, display the desired week (**Week** display).
- 2 From the **Actions** section of the right panel, click **Transfer schedules into timesheet**.
- 3 Click **Validate**.
 All the week's schedules are transferred into the timesheet.

5.5 SHOWING THE LIST OF SCHEDULES

The **Activity overview** menu displays timesheets and schedules as a detailed table. This menu enables employees to quickly see the timesheets and schedules added for the month, the week or the day, mainly if an employee has a lot of different lines.

The features available from the **Timesheets & schedules** menu can also be found in the **Activity overview** menu. The following features are also available using the three icons available at the bottom of the **Activity overview** screen:

- : Export the table of time and schedule lines in Excel format. The export matches the date displayed on the screen and the selected **Month / Week / Day** display.
- : Manage the columns displayed in the table and how they are ordered.
- : Update the table.


5.6 DELETING SCHEDULES



Important

Deleting a schedule cannot be reversed.

Note

Validated schedules cannot be deleted.

From the **Timesheets & schedules** menu, click on the block to open the **Schedule** toolbar, then click on  and confirm the deletion.

From the **Activity overview** menu, click on  in the **Actions** column for the schedule line, then click on  and confirm the deletion.

6 Expense reports

An employee that has to make business expenses must create expense reports in order to be refunded by the company. This employee must add each expense made as well as all the information required by the company.


An expense report contains multiple expense lines. When a new expense report is opened and the employee adds expense lines to it, it is the "current" expense report. Once all expenses are added, the employee must complete the expense report. When an expense report is completed, the approval requests are sent to the relevant approvers or, if no approval has been set up, the expense report is directly transferred to the manager for validation (or rejection). The expense report is "completed" and the employee cannot add additional expenses to it.

Expense reports are mostly managed from the **Expense reports** menu of the **Employee** module. However, it is also possible to add expenses from the timesheets and schedules.

6.1 SEARCHING FOR EXPENSE REPORTS

The **Expense reports** menu displays all the expense reports of the supplier linked to the connected user. Only the latest expense reports are displayed but it is possible to access older expense reports by clicking on **Show more expense reports** at the bottom of the screen.

The **Expand all** or **Collapse all** button, located in the screen's header, can be used to expand or collapse all the expense reports displayed to show or hide the expenses' details.

In the  search field, fill in the first letters of the desired keywords. The expenses matching the search are updated in real time.

From the screen's header, it is also possible to narrow down the expense reports and expenses displayed to easily find the desired one:

Field	Description
Sort by	<p>Select how the expenses are sorted from the drop-down list.</p> <ul style="list-style-type: none">• Date - expenses are sorted by date, in ascending or descending order• Comment - expenses are sorted by comment, in alphabetical or reversed order (if the Comment is not filled in, expenses are sorted by expense type's label)• Allocation - expenses are sorted by project, in alphabetical or reversed order• Entered amount - expenses are sorted by entered amount, in ascending or descending order <div>Note Expense reports are sorted according to the expenses included in them. The expense reports are always in the same order, it is the expenses included in them that can be sorted differently.</div>
Only	When this option is active (displayed in red), only the denied expenses are displayed on the screen.

Field	Description
denied expenses	If an expense report contains both approved and denied expenses, only the denied lines will be displayed.

6.2 ADDING EXPENSES TO AN EXPENSE REPORT

An expense report is made up of one or multiple expense lines. By default, if there is no current expense report when the employee adds an expense line, a new expense report is created automatically. If there is already a current expense report, the expense line is added to the current expense report with the other lines.

It is possible to manage where new expenses are added: according to the expense date, the expense will be added to the expense report of the month or the week, depending on the setup of the **NDF_PAR_PERIODE** management rule.

Reference

For more information about the setup of the **NDF_PAR_PERIODE** management rule, refer to the *Favorites User Guide*.

Expense lines can be added:

- [By creating a new expense \(p. 25\)](#) ;
- [From a time block \(p. 28\)](#), to automatically retrieve all the fields specified in a time block and only modify the desired values;
- [By duplicating an existing expense line \(p. 28\)](#)
- [By using the Smartscan \(p. 28\)](#).

6.2.1 By creating a new expense



1 From the **Expense reports** menu, click on the **+ Expense** button at the top right of the screen.

↳ A form opens to add the expense.



2 In the form, fill in the following fields for the expense:

Field	Description
Type	<p>Fill in the first letters of the expense type and select it from the help list to associate it with the expense. This type represents the expense made: a night at the hotel, a meal at the restaurant, a highway toll, and so on. The different types can be set up in the Application Desktop.</p> <p>An expense report profile can be assigned to an employee. This profile is used to indicate which expense types the employee is allowed to use. This way, when the employee adds expenses, the list of expense types available is filtered.</p>
Date	Fill in the expense date. By default, the current date is filled in.
Quantity	Fill in the quantity or the number of kilometers if the selected expense type is set up as Mileage allowances . By default, this quantity is set to 1.


Field	Description
	This field is only displayed if the Display quantity option is checked in the setup of the selected expense type.
After-tax amount	<p>Fill in the after-tax amount of the expense.</p> <p>Depending on the setup of the selected expense type:</p> <ul style="list-style-type: none"> • a default amount can be filled in; • this default amount cannot be modified.
Currency	Select the currency associated with the after-tax amount from the drop-down list. By default, the company's currency is selected.
VAT	<p>Select the VAT code associated with the expense type from the drop-down list. The VAT amount is calculated automatically using the amount specified and is displayed in the Amount % field.</p> <p>Depending on the setup of the selected expense type, the VAT can be filled in by default but can still be modified. However, the VAT will not be displayed in the form if the VAT non-modifiable and not displayed option is checked in the setup of the selected expense type.</p>
Kilometers	If the expense type is set up as Mileage allowances , fill in the number of kilometers associated with the expense.
Power	If the expense type is set up as Mileage allowances , select the vehicle's fiscal power from the drop-down list. This list only displays the fiscal powers authorized in the employee's record sheet.
Second tax	<p>Select the code of the second tax from the drop-down list. When two tax codes are used, the amounts associated with the each tax rate must be entered manually.</p> <div> <p>Example</p> <p>An employee adds an expense for a meal at a restaurant that amounts to 20 euros: 15 euros for the meal and 5 euros for an alcoholic drink. The first VAT code selected is 10 % and the amount specified in the associated Amount % field is "15". The second VAT code selected is 20 % and the amount specified in the associated Amount % field is "5".</p> </div> <p>This field is only displayed if the expense type is set up as Restaurant / Double tax.</p> <p>Depending on the setup of the selected expense type, the VAT can be filled in by default but can still be modified. However, the VAT will not be displayed in the form if the VAT non-modifiable and not displayed option is checked in the setup of the selected expense type.</p>
Guests	<p>Fill in the first 3 letters of the invited employee. The help list is displayed automatically with the relevant employees. Select the desired employee from the help list.</p> <p>To add an external guest, add the guest using the First name Last name (Company) or Last name (Company) formats, then press the Enter key. If you only specify the external guest's first or last name, the missing company will be indicated with (?).</p>
Comment	Add a comment to the expense.
Additional comment	If needed, add an additional comment to the expense.
Allocation	To add a customer and a project to the expense:

Field	Description
	<p>1. In the  search field, fill in the first 3 letters of the name or code of the desired customer, project, phase or sub-phase.</p> <p>↳ The list automatically displays the relevant projects. This list only includes projects with a state code that enables to add expenses.</p> <p>2. Select the desired project.</p> <p>↳ The Allocation field is filled in with the selected project, phase and sub-phase. The Customer field is automatically filled in with the customer associated with the allocation.</p> <div style="background-color: #e6f2ff; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>When the allocation is filled in, the Customer field can only be modified if it is a multi-customer project.</p> </div>
Paid with business card	Check this box to mark the expense as "paid with a business card". The expense line will be identified by the  icon.
Rebillable	Check this box if you want to rebill the expense to the selected customer.
Non-refundable	Check this box if the expense must not be refunded.
Receipt no.	Fill in the number of the receipt added to the expense.
Custom request no.	<p>Fill in the number of the custom request associated with the expense.</p> <p>This field is only displayed if the expense type is set up as an expected expense type.</p>

3 In the form, add one or multiple expense receipts, for example the photo of a receipt or a proof of purchase for a train ticket. To add receipts, you can:

- drag and drop the desired receipts in the  icon;
- click on  to open the file explorer and select the desired receipts.


Note

If adding a receipt has been set up as required for the corresponding expense type, the expense will be checked when it is saved. If required receipts are missing, it will not be possible to complete or bill the expense report. The expenses missing a required receipt are marked by the .

Tip



The receipts added to an expense can be displayed on the left of the input form. You can therefore display the receipt while filling in the form.

4 Click **Save**.

↳ The expense is created and is added to the relevant expense report in the **Expense reports** menu. From the **Timesheets & schedules** menu, the  icon shows the days that include expenses.

6.2.2 From a time block


1 To create an expense that is directly linked to a timesheet:

- From the **Timesheets & schedules** menu, click on the relevant time block to open the **Timesheet** toolbar, then click on .
- From the **Activity overview** menu, click on **...** in the **Actions** column for the relevant line, then click on .

↳ The expense window opens. The customer and the project filled in for the time block are retrieved automatically.

2 In the window, fill in the required fields. For more information about the fields, refer to [Expense reports \(p. 24\)](#).


3 Click **Save**.

↳ The expense is created and is added to the relevant expense report in the **Expense reports** menu. From the **Timesheets & schedules** menu, the  icon shows the days that include expenses.

6.2.3 By duplicating an existing expense line

An existing expense can be duplicated to quickly create a new expense.

There are two ways to duplicate an expense line from the **Expense reports** menu:

- Click on the desired expense to open its form, then click on **Duplicate**. All the fields from the source expense are retrieved. Modify the desired information then click **Save** to create the new expense.
- Click on  on the right of the desired expense, then click **Duplicate**. All the fields from the source expense are retrieved. Modify the desired information then click **Save** to create the new expense.

6.2.4 By using the Smartscan


Important

To be able to use the Smartscan, it must be active and set up from the Administration Console, and external expense types must be set up from the Application Desktop.

Akuiteo provides an Optical Character Recognition (OCR) system to simplify the process of adding expenses to an expense report. When a receipt is photographed, the characters are automatically recognized and are then added in the expense's relevant fields.

1 From the **Expense reports** menu, click on the **Smart Scan** button at the top right of the screen.



2 Select the desired receipt from the file explorer.

↳ The Smartscan recognizes characters in the selected receipt. The expense is created and is added to the relevant expense report in the **Expense reports** menu. From the **Timesheets & schedules** menu, the  icon shows the days that include expenses.

Important

You must check the expense created and the values detected by the Smartscan. Some values can be incorrect and others can be missing if the Smartscan was not able to successfully recognize the characters.


6.3 MANAGING EXPENSE REPORTS

The **Expense reports** menu displays all the current, completed or validated expense reports of the connected user. Click on  in the expense report's header to show all its expenses or click on  to hide its expenses and only show the expense report's header.

The expense report's header includes the following information:

- The title of the expense report, with its state and when it changed to this state (for example *completed on September 9, 2019*).
- The different icons that represent the actions available for the expense report.
- The expense amount and the amount refunded/to be refunded. Hover over the amount area to show the amount details:
 - **Total amount** - Total amount of all the expenses added to the expense report
 - **Non-refundable amount** - Sum of the non-refundable expenses, for example expenses that were marked as non-refundable or that were denied.
 - **Threshold's exceeded amount** - Sum of the amounts above the threshold of the expenses with an exceeded threshold
 - **Total to be refunded** - Amount to be refunded to the employee

6.3.1 Modifying expense reports

- 1 Click on  in the desired expense report's header then click on **Modify**.
- 2 Modify the **Title** and the **Date** of the expense report.
- 3 Click on **Modify** to save the changes.

↳ The expense report's title and date are modified.

6.3.2 Changing the employee

DMF	190509 WEB PORTAL EXPENSE REPORTS CHANGE EMPLOYEE (THAT I MANAGE)
	190510 WEB PORTAL EXPENSE REPORTS CHANGE EMPLOYEE (ALL EMPLOYEES)

By default, when a user opens the **Expense reports** menu, the employee linked to this user is selected in the **Employee** field. The expense reports displayed are the ones of the supplier linked to this employee.


It is possible to change this employee to be able to add expenses and to display the expense reports of another employee. When the employee is changed, all the rules, all the expense report profiles and all the refund thresholds are reloaded to apply the ones set up for the selected employee.

Example

A manager must add a travel expense for one employee. This manager does not have any refund threshold for travel expenses, however the employee can be refunded up to 50 euros for each travel expense.

When the manager selects the employee from the **Employee** field and adds a travel expense, the threshold of 50 euros will be applied.

To change the employee, select the desired employee from the **Employee** drop-down list, in the header of the **Expense reports** menu.

Click on  in the **Employee** field to remove the selected employee.

6.3.3 Completing expense reports

Once all the expenses have been added to the current expense report, the employee must complete the expense report to send approval requests to the different approvers or to transfer it to the manager for validation.

Important

If adding a receipt has been configured as required for the corresponding expense types, the expense report will be checked when it is completed. If some required receipts are missing, the expense report cannot be completed.

1 From the desired expense report's header, click on **Complete**.

2 Confirm the completion.

↳ Checks are made depending on the setup of the expense types used in the expense report. If there is no error, the expense report is completed and is displayed with the following state:
completed on January 01, 2000.

The expenses associated with this expense report can no longer be modified. If the employee has made mistakes and has the required rights, the completion can be canceled by clicking on **Cancel completion**.

6.3.4 Publishing expense reports

To publish an expense report, you must previously set up report templates for expense reports.


1 From the desired expense report's header, click on .

2 Select the **Template** from the drop-down list.

3 Depending on the setup of the report template, a window can open. Fill in the publishing parameters then click on **Validate**.

↳ The expense report is published and saved on your computer.

6.3.5 Downloading linked documents

- 1 From the desired expense report's header, click on .
↳ A window opens with the list of documents linked to the expense report.
- 2 Click on the desired document to download it.


6.3.6 Deleting expense reports

Important

Deleting an expense report and its expenses cannot be reversed and also deletes the linked documents.

Note





When an expense report is deleted, all the expenses included are also deleted.

From the **Expense reports** menu, click on  in the desired expense report's header, then click on **Delete** and confirm the deletion.

6.4 MANAGING EXPENSES


In the **Expense reports** menu, each expense corresponds to a line in an expense report.

An expense line includes the following information:







- The expense's date, type, allocation and amount (the type's label is replaced by the comment if one was added).
- The icon set up for the expense type.
- Different icons can be displayed on the left of the expense amount:
 -  - When it is required to add a receipt for the expense type, this icon indicates that a required receipt is missing.
 -  - Indicates the expense has one or multiple receipts, with the number of receipts showed in a badge.
 -  - Indicates the expense was paid with a business card.
 -  - Indicates the expense was denied.


6.4.1 Viewing receipts

From the **Expense reports** menu:

- Click on  in the expense line to open the first receipt added to the expense.
- Click on the expense line to open its details, then click on the desired receipt.

The preview of the linked receipts is displayed in a separate window on the left of the expense details. The following actions are available from this window:

- View the different receipts using the left and right arrows.
-  Download the receipts.
-  Zoom in and  zoom out on a receipt.
- Rotate the preview to the left  or to the right .
-  Delete a receipt.

Click on  to close the preview window.

6.4.2 Finishing incomplete expenses

When an expense is created from the portal, all the fields required to create this expense must be filled in to be able to validate this creation.

However, when an expense is added from the Akuiteo Mobile application, it can be created even if some required fields are left empty. In this case, incomplete expenses can be finished directly from the mobile application, but it can also be done from the **Expense reports** menu of the portal's **Employee** module.

Reference

For more information about using the Akuiteo Mobile application, refer to the *Akuiteo Mobile General guide*.

For the incomplete expenses, the allocation is replaced by a red text indicating the missing fields. Click on the expense line to open the input form, fill in the fields needed then click **Save**.

6.4.3 Modifying expenses

The expenses added can be modified at any time as long as they are included in a current expense report. When the expense report is completed, the expenses can no longer be modified.


To modify an expense from the **Expense reports** menu, click on the desired expense line.

6.4.4 Moving expenses

Important

This feature is only available if the **NDF_PAR_PERIODE** management rule is active and if there is at least two current expense reports.


An expense can be moved from a current expense report to another one, for example if there was a mistake on the expense date or if an expense must be included in another expense report.

- 1 Click on  in the desired expense line, then click **Move**.
↳ A window opens with the list of all the current expense reports of the connected user.
- 2 Modify the expense date so it matches the expense report where the expense will be moved.
- 3 Select the expense report where the expense must be moved.
- 4 Click on **Move**.

↳ The expense is moved to the selected expense report, at the date specified.

6.4.5 Resuming or discarding expenses

The expenses in an expense report can be denied by an approver. The approved expenses are refunded but the denied expenses are not taken into account in the total refunded amount of the expense report.

The line of a denied expense is displayed in red with the  icon.

Resuming an expense

A denied expense can be resumed, that is to say the expense will be added to the latest current expense report. The employee can then modify the information needed and submit the expense again so it can be refunded.

1 Click on  in the denied expense line, then click **Resume**.

2 Confirm.

↳ The expense is added to the latest current expense report.

Discarding an expense

A denied expense can be discarded, that is to say the employee agrees with the expense's denial and that it will not be refunded.

1 Click on  in the denied expense line, then click **Discard**.

2 Confirm.


↳ The expense is still denied but it can no longer be resumed.

6.4.6 Deleting expenses

Important

Deleting expenses cannot be reversed and also deletes the linked documents.

The expenses added can be deleted at any time as long as they are included in a current expense report. When the expense report is completed, the expenses can no longer be deleted.

From the **Expense reports** menu, click on  in the desired expense line, then click on **Delete** and confirm the deletion.

7 Leave requests

An employee acquires different types of leave days when working for a company: paid leaves, additional rest days, maternity/paternity leaves, and so on. The number of days depends on the employee's work contract as well as on the policies implemented by the company. These leave counters are available in the portal so employees can quickly and easily send leave requests to their managers, or any person in charge of validating these requests.

There are as many leave counters as there are leave types. Each counter displays a summary of the rights acquired so that the employee knows exactly how many days to ask for when making a leave request. The employee can also transfer days acquired for a specific leave type to another leave type.

When an employee makes a leave request, it is transferred to the person in charge of validating or rejecting the request. At any time, employees can look at the overview of their requests, to know if they are still pending or if they have been validated or rejected.

Leaves are managed from the **Leave requests** menu in the **Employee** module.

7.1 DESCRIPTION OF THE LEAVE COUNTERS

Leave counters clearly display the number of days acquired by the employee. There are as many counters as there are leave types: one counter for paid leaves, another one for additional rest days, and so on. There are also as many counters as there are time periods.

Example

Today is December 26. From my leave requests, I can see my paid leaves counter for the current year, from 01/01 to 12/31. Depending on how my company is set up, I can also see a second paid leaves counter for the following year.

Each counter displays the following information:

Counter header	The leave type, for example Paid leaves or Maternity leaves.
From mm-dd-yyyy to mm-dd-yyyy	The time period when the counter is active. This period usually lasts a year, from January to December or from May to April, depending on the policies implemented by the company regarding leave management.
X day(s) acquired	The number of days acquired by the employee for the given period.
X day(s) transferred	The number of days transferred from another leave type to the counter's leave type.
X day(s) taken	The number of days already taken by the employee, meaning the number of validated leave days for the given period.
X day(s) to request	The number of days left to request for the given period.



X day(s) scheduled	The number of days added to the schedule with, in brackets, the number of scheduled days that have not been validated yet.
X day(s) remaining	The number of days left to request for the given period.

7.2 REQUESTING LEAVES

1 From the **Leave requests** menu, find the desired counter then click **Request**.

↳ The leave request window opens.

2 In the window, fill in the following fields:


Field	Description
	The date of the leave request. It is the date on which the employee makes the request. This date cannot be modified.
<i>Leave type</i>	The leave type selected by default is the counter's, used to make the request. If needed, select another leave type from the help list.
Starts	Check either morning or afternoon to indicate whether the leave period will start at the beginning or at the middle of the day.
<i>Period</i>	<p>Click on the field to select the leave period.</p> <p>If you only want to take one day off, fill in the same day for the period. If you want to take multiple days in a row, fill in the first and last days of the desired leave period.</p> <div style="background-color: #f0f0f0; padding: 10px; margin: 10px 0;"> <p>Examples</p> <p>I want to take a day off on December 9. Therefore, I will define a period from 12-09 to 12-09.</p> <p>I want to take the whole week off from March 11 to 15. Therefore, I will define a period from 03-11 to 03-15.</p> </div> <p>When the period is defined, click Ok to validate.</p>
<i>Number of days</i>	<p>The number of leave days is calculated automatically depending on the period defined and on specific setup items: national holidays, part-time work, and so on.</p> <p>If needed, fill in the number of days manually or click on  to recalculate the number depending on the period defined.</p>
Comment	Enter a comment to give more details about the leave request.
Send by email	Set the indicator to YES to notify by email the person in charge of validating your leave request. The recipient's email address is displayed below and can be modified. This email can only be sent once, when the leave request is created.

3 Click **Validate**.

↳ The leave request is created. The days taken can be seen in the leave counter. The request can be viewed from the requests overview table, in the **Pending** tab.


7.3 MODIFYING LEAVE REQUESTS

A leave request can be modified by the employee as long as this request has not yet been validated or rejected by the manager. If you need to modify a request that has already been validated or rejected, ask your manager to cancel the request's validation.

To modify a leave request from the **Leave requests** menu, click on the **Pending** tab in the requests overview table, then click on  in the **Actions** column for the relevant line.


7.4 CANCELING LEAVE REQUESTS

A leave request can be canceled by the employee as long as this request has not yet been validated or rejected by the manager. If you need to cancel a request that has already been validated or rejected, ask your manager to cancel the request's validation. A canceled request can be reactivated at any time.

To cancel a leave request from the **Leave requests** menu, click on the **Pending** tab in the requests overview table, then click on  in the **Actions** column for the relevant line. The canceled request can be viewed in the **Canceled** tab.

7.5 DELETING LEAVE REQUESTS

A leave request can be deleted by the employee as long as this request has not yet been validated or rejected by the manager. If you need to delete a request that has already been validated or rejected, ask your manager to cancel the request's validation. Deleted requests cannot be retrieved.

To delete a leave request from the **Leave requests** menu, click on the **Pending** tab in the requests overview table, then click on  in the **Actions** column for the relevant line.


7.6 TRANSFERRING LEAVE DAYS

An employee can transfer days from one leave counter to another, for example transferring the paid leaves that were not taken during the previous year to the current year's counter.

1 From the **Leave requests** menu, find the desired counter then click **Transfer**.

↳ A window opens.

2 In the window, fill in the following fields:


Field	Description
	The date of the transfer request. It is the date on which the employee makes the request. This date cannot be modified.
Source leave type	The leave type selected by default is the counter's, used to make the request. This source leave type cannot be modified.

Field	Description
<i>Target leave type</i>	Select the target leave type from the drop-down list. The days will be transferred to the counter associated with the leave type.
<i>Number of days</i>	Fill in the number of days to be transferred. You cannot enter a number that exceeds the remaining number of days in the source counter.
Comment	Enter a comment to give more details about the transfer request.

3 Click **Validate**.

➡ The transfer request is created. The days transferred are deducted from the source counter. The request can be viewed from the requests overview table, in the **Transfer** tab.

A transfer request can be canceled by the employee as long as this request has not yet been validated or rejected by the manager. If you need to cancel a request that has already been validated or rejected, ask your manager to cancel the request's validation.

To cancel a transfer request from the **Leave requests** menu, click on the **Transfer** tab in the requests overview table, then click on  in the **Actions** column for the relevant line.

7.7 SHOWING THE LIST OF LEAVE REQUESTS

From the **Leave requests** menu, an overview table displays the complete history of leave requests. This table enables employees to quickly view their leave requests as well as modify or cancel some requests depending on their status.

- The **Pending** tab displays the list of requests that have not yet been validated or rejected by the manager. The pending requests cannot be modified, canceled or deleted.
- The **Validated** tab displays the list of requests that have been validated by the manager.
- The **Rejected** tab displays the list of requests that have been rejected by the manager.
- The **Canceled** tab displays the list of requests that were canceled by the employee. The canceled requests can be reactivated or deleted.
- The **Transfer** tab displays the list of transfer requests. The transfer requests can be canceled.

By default, only the requests related to the current period are displayed. To display all the requests, check the **Show past leave requests** box above the list of requests.

8 Custom requests

Custom requests enable employees to create specific requests depending on each company's needs. For example, a company can create a category of custom request so that employees can request days to work remotely, to travel for work or even to make a purchase request. Each company can use as many custom request categories as needed to manage its internal processes.

When a custom request is created, it is categorized as "To ask". The employee must then request for the custom request's approval in order to transfer it to the manager or any person in charge of approving these requests. The custom request is now categorized as "To approve". Approved custom requests are categorized as "Approved".

A custom request is made up of:

- a base of fields that are shared with all custom requests;
- custom data that are specific to each category of custom request.

Note

Depending on the custom data, some custom requests cannot be used from the portal.

In the Application Desktop, a custom request is made up of multiple tabs: a main tab that includes all the fields shared with all custom requests and an undefined number of tabs that include custom data (that can be entirely set up depending on the company's needs). Some of these custom data can be displayed on the main tab.

In the portal, the number of custom data that can be displayed is limited. If some important custom data cannot be accessed from the custom request's form on the portal, the custom request will not be usable.

The categories of custom requests are created and set up from the Application Desktop, but these requests can be used from the portal, in dedicated menus of the **Employee** module.

8.1 CREATING CUSTOM REQUESTS

Custom requests can be created:


- [From an empty custom request \(p. 38\)](#) ;
- [From a time block \(p. 39\)](#), to automatically retrieve all the fields specified in a time block and only modify the desired values;
- [By duplicating an existing custom request \(p. 40\)](#).

8.1.1 From an empty custom request

- 1 From the menu corresponding to the desired category of custom request, click **New**.

↳ The custom request screen opens. This screen displays the fields shared with all custom requests as well as the custom data that are specific to the custom request's category.

- 2 In the input screen, fill in the fields that are shared with all custom requests:

Field	Description
Title	Give a title to the custom request.
Customer	Fill in the first letters of the desired customer. The help list is displayed automatically with the relevant customers. Select the desired customer from the help list.
Date	<p>Click on  to select the date and time of the custom request.</p> <div> <p>Example</p> <p>I have a training session on March 3. When I create a custom request for this training, I set the date to March 3.</p> </div>
Description	Enter a comment to give more details about the request.
Currency	Select the currency from the help list. This currency will be used if the custom request implies expenses.
Expenses	<p>Check the With expense box if the custom request implies expenses or No expense if it does not.</p> <div> <p>Example</p> <p>I have to travel for work, so I check the With expense box when I create my custom request for work travels.</p> <p>I want to work remotely for a day, so I check the No expense box when I create my custom request for remote working.</p> </div>
Project, Phase and Sub-phase	Select the project, phase and sub-phase from the relevant help lists. If there is only one value available for a field, it is filled in automatically.
Multiple projects	Check this box if the custom request is associated with multiple projects. If the box is checked, the Customer , Project , Phase and Sub-phase fields are grayed-out.

3 In the input screen, add one or several receipts or documents linked to the custom requests, for example a training contract for a training custom request. To add receipts, you can:

- drag and drop the desired receipts in the **Link receipt** frame;
- click on the **Link receipt** frame to open the file explorer and select the desired receipts.



4 Fill in the custom data that are specific to the custom request's category.

5 Click **Save**.

↳ The custom request is created but has not been transferred for approval yet. The custom request is categorized under the **To ask** section in the corresponding menu.

8.1.2 From a time block

1 To create a custom request that is directly linked to timesheets:

- From the **Timesheets & schedules** menu, click on the relevant time block to open the **Timesheet** toolbar, then click on .
- From the **Activity overview** menu, click on "" in the **Actions** column for the relevant line, then click on .

↳ The custom request window opens. The customer and the project filled in for the time block are retrieved automatically.

2 In the window, fill in the required fields. For more information about the fields, refer to [From an empty custom request \(p. 38\)](#).



3 Click **Validate**.

↳ The custom request is created but has not been transferred for approval yet. The custom request is categorized under the **To ask** section in the corresponding menu.


8.1.3 By duplicating an existing custom request





An existing custom request can be duplicated to quickly create a new request for the same category.

There are two ways to duplicate a custom request from the corresponding menu:

- In the custom requests overview, click on  for the line to be duplicated. Confirm the duplication to open the screen of the duplicated request. Modify the required information then click **Save**.
- From the screen of the custom request to be duplicated, click on  in the request's header. Confirm the duplication to open the screen of the duplicated request. Modify the required information then click **Save**.

8.2 MANAGING CUSTOM REQUESTS

From the menu corresponding to the desired category of custom request, click on  for the desired line to open the request's screen. This screen is used to manage the custom request.

- Click on  in the header to cancel the custom request. This feature is only available for the approved requests or the ones to be approved.
- Click on  in the header to send the custom request to the manager by email.
- Click on  in the header to publish the custom request. The formats that are available depend on the report templates set up for custom requests.
- Click on  in the header to delete the custom request.

From the custom request's screen, modify the desired information then click **Save** at the bottom of the screen.

8.3 MANAGING PLANNED EXPENSES

An employee can add one or multiple planned expenses in a custom request. For example, if it is a travel request, the employee can add the expenses planned for the travel (accommodation, transportation, meals, and so on).




The planned expenses are managed in the **Planned expenses** section of the custom request's screen.

8.3.1 Adding expense lines

- 1 From the **Planned expenses** section, click **Add**.

↳ A window opens. The information about the customer and the project are already filled in with the custom request's values.

- 2 In the input window, fill in the following fields:

Field	Description
	Select the planned expense's type from the help list.
	Fill in the quantity and the unit price for the selected type. The currency is filled in automatically with the currency selected for the custom request.
	Describe the expense to give more details.
Expense report	Check this box to automatically create an expense report for the planned expense, on the custom request's date.

- 3 Click **Validate**.

↳ The expense line is added to the custom request, in the **Planned expenses** section.

8.3.2 Adding expenses from a template

It is possible to set up templates for planned expenses so that employees can enter expenses more easily. A template contains one or multiple expense lines that are already filled in. These lines will be added automatically to the custom request, so the employee can only modify the necessary information instead of having to add each expense manually.

- 1 From the **Planned expenses** section, click **Add from template**.



↳ A window opens to display the list of templates set up.

- 2 Select the desired template then click **Add lines**.

↳ The lines set up in the template are added automatically to the custom request, in the **Planned expenses** section.

8.3.3 Modifying or deleting expenses


From the **Planned expenses** section:

- Click on  for the desired line to modify the planned expense.
- Click on  for the desired line to delete the planned expense.

8.4 REQUESTING APPROVALS

When a custom request is created, this request is not transferred automatically for approval to the

manager. This way, the employee can still modify and fill in the request. However, the employee must request the manager's approval to transfer the custom request.

- 1 From the menu corresponding to the desired category of custom request, open the **To ask** category.
- 2 Click on  for the relevant line to open the custom request's screen.
- 3 Click **Request approval**.

↳ The custom request is transferred to the manager or to the person in charge of approving. The custom request is categorized under the **To approve** section in the corresponding menu.

8.5 SHOWING THE LIST OF CUSTOM REQUESTS

From the menus corresponding to the custom request, the list of custom requests is displayed in different categories. This list enables employees to quickly view their custom requests and know their status. Open each category to display the list of corresponding custom requests.

- The **To ask** category displays the list of custom requests created by the employee that have not yet been transferred for approval.
- The **To approve** category displays the list of custom requests transferred for approval that have not yet been approved.
- The **Denied** category displays the list of custom requests that have been denied.
- The **Approved** category displays the list of custom requests that have been approved.

CRM module

The **CRM** module of the Web Portal is designed for sales people who need a reliable business portfolio as well as a comprehensive solution to manage their sales.

Sales people can manage their business portfolio using opportunities to account for a prospect or customer's activity. They can also consult their address book to find the details about a contact, a prospect or a customer. The **CRM** module is used to manage any new business, that is to say opportunities linked to prospects. It is also possible to do "Customer Success Management" using the customer base and the opportunities linked to customers. To manage their schedules, sales people have a dedicated to-do list to manage the actions to do and the ones that are late, whether it is a call to make or an email to send. Additionally, the fields displayed in the different screens of the **CRM** module can be customized so the sales team only has the necessary fields.

The **CRM** module can be accessed by the sales team in a company.

Opportunities (p. 44)

Opportunities represent ongoing projects for the sales team: for example a new opportunity brought by a prospect, a sales opportunity for an existing customer, and so on. The sales person assigned to an opportunity will make it go through different sales stages until the opportunity can be marked as won or lost. [...]

Contacts, prospects and customers (p. 53)

To carry out their job, sales people need an address book that gathers all prospects and customers, as well as the associated contacts. Sales people can therefore create new prospects when needed, search in the address book to find a customer, prospect or contact, and view the different record sheets to find the information needed. [...]

Actions (p. 56)

An action is a task that must be done for a specific opportunity or for a customer or prospect in general. To make progress in their work, sales people have to perform a number of actions: for example they can call a prospect, make a product demo or send a business proposal. These actions are managed directly from the portal to easily follow up on them. [...]

Interface customization (p. 64)

The CRM module can be customized in several ways to match the specific needs of each company, but also the needs of each employee. [...]

9 Opportunities

Opportunities represent ongoing projects for the sales team: for example a new opportunity brought by a prospect, a sales opportunity for an existing customer, and so on. The sales person assigned to an opportunity will make it go through different sales stages until the opportunity can be marked as won or lost.

Opportunities are organized in pipelines. An opportunity pipeline gathers opportunities that belong to the same type of business. Each pipeline contains different sales stages, set up according to the specific needs and business processes of each company.

These sales stages are used to make the opportunity progress: when an opportunity is created, it is added to the first sales stage that is set up. Once the first stage of the sales process is completed, the sales person can move the opportunity to the next stage, and so on until all stages have been completed or the opportunity has been won. At any time, if an opportunity does not meet the required criteria, the sales person can mark this opportunity as lost.



To make this opportunity progress, the sales person has to do a number of tasks, called actions. For example, the sales person may have to call a prospect, make a product demo or send a business proposal. These actions can be associated with a specific opportunity or, more generally, with a customer, a prospect or a contact.

The opportunity is displayed as a card in the Kanban board of the opportunity pipeline. These cards display pieces of information about the opportunity. From the card, it is possible to open the opportunity record sheet to display all the information, as well as the different documents, contacts or actions linked to the opportunity.

Opportunities are managed from the **Opportunities** menu in the **CRM** module.

9.1 SEARCHING FOR AND FILTERING OPPORTUNITIES

The **Opportunities** menu contains two views:

- the  opportunity pipeline;
- the  signature schedule.


To switch from one view to another, click on the corresponding icon in the header.

In the signature schedule, it is possible to navigate from one month to another using the left and right arrows. Click **Current month** to come back to the current month.

Note

The search and filter features only apply to the opportunities displayed on the screen. Akuiteo does not look for all the opportunities of the database, which is convenient if there is an important number of opportunities.

9.1.1 Searching for opportunities

In the  search field, fill in the first letters of the customer or the opportunity. The opportunities matching the search criteria are updated directly so it is easy to find the desired opportunity.

From the opportunity pipeline or the signature schedule, it is also possible to narrow down the opportunities displayed to easily find the desired one:

Field	Description
Pipeline	Select the pipeline from the drop-down list to display all the opportunities included in this pipeline.
Sales person	Select an employee, a team or a department from the drop-down list to only display the opportunities linked to the selection. <ul style="list-style-type: none">• Me - your opportunities• All - all existing opportunities• My team - your opportunities and your team's opportunities• My department - your opportunities and your department's opportunities• No sales person assigned - the opportunities that have not been assigned to a sales person yet• Other employees - the opportunities of the selected employee
Sort by	Select how the opportunities are sorted from the drop-down list. <ul style="list-style-type: none">• Last update - opportunities are sorted by the last created action's date, in ascending or descending order• Customer - opportunities are sorted by customer, in alphabetical or reversed order• Amount - opportunities are sorted by estimated amounts, in ascending or descending order• Sales person - opportunities are sorted by sales person, in alphabetical or reversed order

9.1.2 Filtering opportunities

1 From the opportunity pipeline or the signature schedule, click **Filter**.

↳ The **Advanced filters** window opens.

2 In the window, check the relevant boxes for the filters that should be applied. You can combine as many filters as necessary.


3 Click **Apply**.

↳ The opportunities matching the filters applied are displayed. The other opportunities are hidden.

To delete the filters applied, click **Filter** then **Remove filters**.











9.2 CREATING OPPORTUNITIES

1 Opportunities can be created:

- from the **Opportunities** menu by clicking on the **+ Opportunity** button on the screen's right;
- from a customer or a prospect record sheet by clicking on  on the screen's right.

↳ A window opens.

2 In the window, fill in the following fields:

Field	Description
	<p>Fill in the first letters of the customer or the prospect associated with the opportunity. The help list is displayed automatically with the relevant customers and prospects. Select the desired customer or prospect from the help list.</p> <p>If the opportunity is created from a customer or a prospect record sheet, the customer or prospect is filled in automatically.</p> <p>If the customer or prospect does not already exist, enter the full name then click New. This way, the new prospect is created automatically.</p>
	Give a name to the opportunity. This name identifies the opportunity and can be used for research.
	Fill in the amount associated with the opportunity. This amount is an estimate that can be detailed throughout the opportunity's life.
Currency	Select the currency from the drop-down list. This currency is associated with the entered amount.
Number of days	Fill in the number of days associated with the opportunity. This number is an estimate that can be detailed throughout the opportunity's life.
Sales person	<p>Fill in the first letters of the employee in charge of the opportunity. The help list is displayed automatically with the relevant employees. Select the desired employee from the help list.</p> <p>By default, the employee creating the opportunity is already filled in.</p>
	<p>Fill in the first letters of the contact associated with the opportunity. The help list is displayed automatically with the relevant contacts. Select the desired contact from the help list.</p> <p>The information specified in the selected contact is filled in automatically: telephone numbers, position in the company and email address.</p> <p>If the contact does not already exist, enter the full name then click New. The contact record sheet is created automatically.</p>
 and 	Click on  to fill in a cell phone number or on  for a landline phone.
Position	Fill in the contact's position inside the company.
	Fill in the contact's email address.
	Fill in the estimated closing date. The opportunity will be categorized under this date in the signature schedule.
Description	Describe the opportunity to give more details.

3 Click **Save**.

➡ The opportunity is created. The opportunity's card is added to the first stage in the opportunity pipeline. The card is also displayed in the signature schedule, on the estimated closing date.

9.3 MANAGING OPPORTUNITIES

9.3.1 Opening opportunities

The **Opportunities** menu displays opportunity cards in a Kanban board or in a calendar. From this menu, opportunities can be moved from one stage to another but their content cannot be modified.

To modify an opportunity, you must open its record sheet:

- Click on the opportunity's name in the opportunity pipeline or the signature schedule from the **Opportunities** menu.
- In the associated customer or prospect record sheet, click on the **Opportunities** tab then click on the desired opportunity's name.

9.3.2 Modifying opportunities

The information related to the opportunity is displayed in the left column. Modify the necessary values then click **Save** in the bottom banner.

Reference

The fields displayed in the opportunity depend on the customization. For more information about customizing opportunities, refer to [Customizing fields in record sheets \(p. 64\)](#).


9.3.3 Managing amounts

The **Amounts** tab is used to make an estimate of the amounts linked to an opportunity. For example, if the opportunity is associated with a prospect, the amount of the quotation that will be sent to the prospect can be estimated. The amounts can be more detailed by estimating the amounts for training, maintenance or the help desk.

There are two levels of estimated amounts: an overview of the amounts and detailed estimated amounts. These two levels cannot be combined, meaning the opportunity either has the overview or the detailed amounts.

Estimated amounts are for informational purposes only and cannot be used in other modules.

Overview of estimated amounts

- 1 From the **Amounts** tab, click on **Estimated amounts**.
- 2 Fill in the estimated **No. of days** and the **Amount**, then select the **Currency** from the drop-down list.
- 3 Click on  to validate the estimate.

This estimated amount can be modified at any time: you can modify the values directly and save any changes made.

Detailed estimated amounts

1 From the **Amounts** tab, click on **Detailed estimated amounts**.


↳ The **Detailed estimated amounts** table is displayed. If an overview of the amounts was already filled in, the information will be displayed in the recap line. This line displays the total estimated amounts for all the lines specified.


2 In the first line, fill in the following fields:

Field	Description
Type	Select the type from the drop-down list. These are opportunities sales types, set up from the Application Desktop. The following fields depend on the selected sales type. There are three different options in the sales type setup: <ul style="list-style-type: none">• Number of days and/or Amount• Quantity * U.P.• Quantity * U.P. and possible recurrence
Title	Give a name to the line.
Quantity	Depending on the sales type, fill in the quantity.
Unit price	Depending on the sales type, fill in the unit price associated with the quantity. The currency is added in brackets in the field's name. To modify the currency, click on it in the TOTAL line, select a new currency from the drop-down list then click Validate .
No. of days	Depending on the sales type, fill in the number of days.
Amount	Depending on the sales type, fill in the amount The currency is added in brackets in the field's name. To modify the currency, click on it in the TOTAL line, select a new currency from the drop-down list then click Validate .
Recurrence	Depending on the sales type, fill in the recurrence: <ul style="list-style-type: none">• Select the type of recurrence (every year, every quarter, and so on).• Fill in the recurrence's duration (for X months).
Custom data	The first four custom data set up for the opportunity lines are displayed for each line of estimated amount. Fill in the custom data depending on your needs.

3 Click on  to validate the line.

To add additional lines, click on **Add line** at the bottom of the table.

To duplicate a line, click on  on the left of the desired line. A new line is created with the information of the source line.

To delete a line, click on  on the left of the desired line then confirm the deletion.


Note

To go back to the amounts overview, click on the **Estimated amounts** option or on the < **Back** button at the bottom of the table. However, all the information specified in the detailed estimated amounts will be lost.

9.3.4 Adding items to an opportunity

Adding actions

Actions can be added to an opportunity:


- From the **Opportunities** menu by clicking on the icon on the top right of an opportunity's card. If an action is already scheduled, click **New action**. If there is no scheduled actions, the creation window opens directly.
- From the **Actions** tab of an opportunity record sheet, using the first frame in the left column to add actions.
- From an opportunity record sheet by clicking on  on the screen's right.

Reference

For more information about creating actions and the required fields, refer to [Creating actions \(p. 56\)](#).

Adding documents

Documents can be added to an opportunity from an opportunity record sheet:



- By clicking on  on the screen's right.
- From the **Documents** tab by clicking on the **Upload document** frame.
- By dragging and dropping the document in the **Upload document** frame.

The documents added to an opportunity are displayed in the opportunity's **Documents** tab. When a document is associated with an opportunity, this document is created on the opportunity's company.

To open a document, click on it to download it.

To remove a document, click on  then **Delete**.

Linking contacts

- 1 From an opportunity record sheet, click on  on the screen's right.
- 2 In the **Customer** field, fill in the first letters of the customer or prospect that is associated with the contact. The help list is displayed automatically with the relevant customers. Select the desired customer from the help list.
- 3 In the **Contact** field, open the drop-down list to display all the selected customer's contacts, then select the desired contact.
- 4 Click **Validate**.
 The contact is linked to the opportunity and is displayed in the opportunity's **Contacts** tab.

To open a contact record sheet, click on the desired contact's name or click on  then **Show details**.

To remove a contact, click on  then **Delete link**.

9.3.5 Deleting opportunities

Important

Deleting an opportunity cannot be reversed. However, the linked customer and contacts will not be deleted.

Note

Opportunities that are associated with orders or quotations cannot be deleted.



From the opportunity pipeline, select the desired opportunity card then drag and drop it in the **Delete** frame that appears on the bottom right of the screen. Confirm the deletion.

From the opportunity record sheet, click on **Actions** in the header, then click **Delete** and confirm the deletion.

9.4 MANAGING OPPORTUNITIES FROM THE PIPELINE

9.4.1 Changing stages for an opportunity

An opportunity pipeline contains different sales stages to manage the progress of each opportunity depending on the sales team's specific processes. When an opportunity is created, it is added to the first stage set up, in the far left column. Over time, the opportunity will move from stage to stage.

- 1 From the opportunity pipeline, select the desired opportunity card then drag and drop it in the column of the relevant stage.
 Depending on the customization set up for changing stages, a window opens to display the fields that must be filled in to move to the new stage.
- 2 Fill in the required fields to move to the new stage. If the opportunity goes through multiple stages at once, the windows specific to each change are displayed one after the other.
- 3 Click **Save**.
 The opportunity is displayed in the column of the relevant stage.

Note

The fields that must be filled in to move from one stage to another are entirely customizable for each stage. For more information about customizing these fields, refer to [Customizing fields for sales stages](#) (p. 64).

9.4.2 Marking opportunities as won

The criteria that must be met to consider an opportunity as won can be very different from one company to another. For example, a company can consider an opportunity as won when the prospect or the customer has given a verbal agreement, whereas another company might wait until the contract is signed. However, the process to mark opportunities as won is the same.

- 1 From the opportunity pipeline, select the desired opportunity card then drag and drop it in the **Won** frame that appears on the bottom right of the screen.

↳ A window opens to display the fields that must be filled in to mark the opportunity as won. If the opportunity was not in the last stage of the pipeline, the windows specific to each change are displayed one after the other.

- 2 Fill in the required fields to mark the opportunity as won:

- In the **New stage** field, select the stage associated with the opportunity's newly-won state from the drop-down list. The stages available are the ones set up for the **Won** status in the Application Desktop.
- In the **Signed on** field, select the quotation's signature date.

- 3 Click on **Mark as won**.

↳ The opportunity is won and is no longer displayed in the opportunity pipeline. You can view it from the list of won opportunities by clicking on **Opportunities won** on the bottom right of the screen.

9.4.3 Marking opportunities as lost

An opportunity can be considered as lost when a prospect or a customer does not agree with the contract, does not sign the quotation, and so on. As for winning opportunities, the criteria for losing opportunities can be very different from one company to another. However, the process is the same.

- 1 From the opportunity pipeline, select the desired opportunity card then drag and drop it in the **Lost** frame that appears on the bottom right of the screen.

↳ A window opens to display the fields that must be filled in to mark the opportunity as lost. Even if the opportunity was not in the last stage of the pipeline, there is only one window displayed since it does not matter whether the opportunity has empty fields or not.

- 2 Fill in the required fields to mark the opportunity as lost:





- In the **Why is it lost?** field, select the reason from the drop-down list. The reasons available correspond to the archiving reasons set up in the Application Desktop for the following standard opportunity statuses: *Lost*, *Aborted* and *Off target*.
- In the **Lost on** field, select the date when the opportunity was lost.

- 3 Click on **Mark as lost**.

↳ The opportunity is lost and is no longer displayed in the opportunity pipeline. You can view it from the list of lost opportunities by clicking on **Opportunities lost** on the bottom right of the screen.

9.4.4 Retrieving won or lost opportunities

To save time when creating an opportunity that is similar to a won or lost opportunity, it is possible to reuse won or lost opportunities.

- 1** From the **Opportunities** menu, click on **Opportunities won** or **Opportunities lost** on the bottom right of the screen.
 The list of won or lost opportunities is displayed.
- 2** Use the search and filter features to locate the desired opportunity.
- 3** Click on  for the desired opportunity.
 A window opens. The customer or prospect and the opportunity's name are retrieved automatically and cannot be modified.
- 4** Select the **Pipeline** where the opportunity will be moved from the drop-down list.
- 5** Click **Save**.
 The opportunity is no longer displayed in the list of won or lost opportunities because it has been moved to the opportunity pipeline. The opportunity's card is added to the first stage in the opportunity pipeline. The card is also displayed in the signature schedule, on the estimated closing date.

9.5 MANAGING OPPORTUNITIES FROM THE SIGNATURE SCHEDULE

The signature schedule displays the opportunities that are scheduled to be signed, month by month. These opportunities are categorized using the scheduled signature date specified in each opportunity's record sheet. The opportunities that have an empty signature date are gathered in the far left column, the **Unscheduled** column.

To navigate from one month to another, use the left and right arrows in the schedule's header. Click **Current month** to come back to the current month.

The signature date of an opportunity can be quickly rescheduled:

- Select the desired opportunity card, then drag and drop it in one of the schedule's columns.
- Select the desired opportunity card, then drag and drop it in one of the frames that appear on the screen's right.

When an opportunity is rescheduled, the signature date is changed for the last day of the selected month.

10 Contacts, prospects and customers

To carry out their job, sales people need an address book that gathers all prospects and customers, as well as the associated contacts. Sales people can therefore create new prospects when needed, search in the address book to find a customer, prospect or contact, and view the different record sheets to find the information needed.

The prospects and contacts can be created directly from the portal. However, customers must be created from the Application Desktop.

Contacts, prospects and customers can be accessed from the **Organisations & Contacts** menu in the **CRM** module. It is also possible to access customer and prospect record sheets from the **Opportunities** menu.

10.1 SEARCHING FOR CONTACTS, PROSPECTS OR CUSTOMERS

The **Organisations & Contacts** menu is used to search through all existing contacts, prospects and customers.

In the search field, fill in the first letters of the desired name. The contacts, prospects and customers that match the search are directly displayed in the drop-down list. Select the desired contact, prospect or customer to open the relevant record sheet.

10.2 OPENING CONTACT, PROSPECT OR CUSTOMER RECORD SHEETS

The **Organisations & Contacts** menu is used to search for contacts, prospects and customers, and to open the relevant record sheets directly from the search results.

To open a record sheet, you can also:

- Click on the prospect's or customer's name in the opportunity pipeline or the signature schedule from the **Opportunities** menu.
- Click on the contact's name in the **Contacts** tab of an opportunity, a customer or a prospect record sheet.


10.3 CREATING PROSPECTS

1 From the **Organisations & Contacts** menu, click on .

↳ An empty prospect record sheet opens.

- 2 In the prospect record sheet, fill in the fields required to create the prospect.
- 3 Click **Save** in the bottom banner.
 - ↳ The prospect is created.

10.4 CREATING CONTACTS

- 1 From a prospect or a customer record sheet, click on  on the screen's right.
 - ↳ An empty contact record sheet opens.
- 2 In the contact record sheet, fill in the fields required to create the contact.
- 3 Click **Save** in the bottom banner.
 - ↳ The contact is created.

10.5 MODIFYING CONTACTS, PROSPECTS OR CUSTOMERS

In a contact, prospect or customer record sheet, the related information is displayed in the left column. Modify the necessary values then click **Save** in the bottom banner.


Reference

The fields displayed depend on the customization. For more information about customizing fields, refer to [Customizing fields in record sheets \(p. 64\)](#).

10.6 ADDING ITEMS TO CONTACTS, PROSPECTS OR CUSTOMERS

Adding actions

Actions can be added to a contact, prospect or customer:


- From the **Actions** tab of an opportunity record sheet, using the first frame in the left column to add actions.
- From an opportunity record sheet by clicking on  on the screen's right.

Reference

For more information about creating actions and the required fields, refer to [Creating actions \(p. 56\)](#).

Adding documents

Documents can be added from a contact, prospect or customer record sheet:

- By clicking on  on the screen's right.
- From the **Documents** tab by clicking on the **Upload document** frame.
- By dragging and dropping the document in the **Upload document** frame.

The documents added are displayed in the **Documents** tab of the contact, prospect or customer record sheet.

To open a document, click on it to download it.

To remove a document, click on  then **Delete**.

10.7 PUBLISHING RECORD SHEETS

To publish the record sheet of a contact, prospect or customer, you must previously set up the relevant report templates.

- 1 From the desired record sheet, click on **Actions** in the header, then click **Edit**.
- 2 In the **Template** field, select the desired report template from the drop-down list.
- 3 Check the **Link document** box to automatically link the report with the record sheet.
- 4 Click **Validate**.

↳ The record sheet is published and saved on your computer.

10.8 DELETING CONTACTS, PROSPECTS OR CUSTOMERS

Important

Deleting a contact, a customer or a prospect cannot be reversed.

From the contact, prospect or customer record sheet, click on **Actions** in the header, then click **Delete** and confirm the deletion.

11 Actions

An action is a task that must be done for a specific opportunity or for a customer or prospect in general. To make progress in their work, sales people have to perform a number of actions: for example they can call a prospect, make a product demo or send a business proposal. These actions are managed directly from the portal to easily follow up on them.

An action is associated with a date: if the action is not completed when the date arrives, it is considered late. Sales people can therefore organize their calendars and their work days depending on the actions that must be completed each day.

There are different categories to differentiate actions, for example a category for phone calls, another for meetings, and so on. The different categories can be set up in the Application Desktop. To use a category in the portal and customize the associated icon, you must set up the categories from the Application Desktop.

Each action is categorized with a different icon depending on the category. As well as being easily recognizable and customizable for each company, these icons are color-coded to show the action's status:

- Green for actions that must be completed but that are not late;
- Red for late actions.

Actions can be managed from the record sheets of an opportunity, a customer and a prospect. They can also be managed from the **Actions** menu to access a specific to-do list interface.

11.1 CREATING ACTIONS

Actions can be created:

- [From the opportunity pipeline \(p. 56\)](#) so the action is directly associated with an opportunity;
- [From a record sheet \(p. 57\)](#) to associate the action with an opportunity, but also with a contact, prospect or customer depending on the needs;
- [From the Actions menu \(p. 59\)](#) to quickly create a new action and manage it from a to-do list.

Notes


When an action is created from an opportunity, it is associated with the opportunity's company. Actions can be managed by users even if they have not been created for the same company as the one used for connection.

When an action is created from an opportunity, it is also displayed on the record sheet of the customer or prospect associated with the opportunity. However, if an action is created from a customer or prospect record sheet, it will not be displayed for the associated opportunities.

11.1.1 From the opportunity pipeline

The opportunity pipeline can be accessed from the **Opportunities** menu and displays all the opportunities that match the search criteria and the filters used. Each opportunity is identified by a card.

For each opportunity, the most recent action is displayed with an icon on the top right of the card:

- Actions to be completed are displayed in green.
- Actions that are late are displayed in red.
- If an opportunity has no scheduled actions, the  icon is displayed.

- 1 From the opportunity pipeline, click on the icon on the top right of the desired opportunity.
- 2 Click **New action**. If there was no scheduled actions, the creation window opens directly.
- 3 In the creation window, fill in the following fields:


Field	Description
Task	Select the category from the drop-down list. The category's name is filled in automatically. Modify this name if needed. Depending on the selected category, the following fields can be different.
Start (only for tasks)	Fill in the start date and time of the action. A task will be considered late if its due date has passed. However, if there is no due date specified, the task will be considered late if its start date has passed.
Due date (only for tasks)	Fill in the due date and time of the action. A task will be considered late if its due date has passed.
Date (for notes and appointments)	Fill in the start date and time of the action. A note or an appointment will be considered late if its start date has passed.
Duration (only for appointments)	Fill in the end time of the action. This end time is used to determine the appointment's duration.
Completed (for tasks and appointments)	If the box is checked, the action will be completed as soon as it is created. This way, you can quickly create and complete actions that have already been done, for reference purposes.
Assigned to	Fill in the first letters of the employee in charge of the action. The help list is displayed automatically with the relevant employees. Select the desired employee from the help list. By default, the employee creating the action is already filled in.
Comment	Enter a comment to give more details about the action.

- 4 Click **Save**.

➡ The action is added to the opportunity. It can be viewed directly from the opportunity pipeline by clicking on the icon on the top right of the relevant opportunity to open the list of scheduled actions.

11.1.2 From a record sheet

An action can be associated with an opportunity, a contact, a prospect or a customer. The scheduled actions can therefore be found in the corresponding record sheets.


The list of scheduled actions is displayed in the **Actions** tab of a record sheet. Actions are ordered from the most recent to the oldest one. There are two ways to create a new action from a record sheet: from a dedicated frame in the **Actions** tab or by clicking on  from any tab of the record sheet.

To create an action from the **Actions** tab:

- 1 In the first frame on the screen's left, click on the icon corresponding to the desired action category. Hover over each icon to know which category it is.

↳ The category's name is filled in automatically.

- 2 In the **Subject** field, modify the name if needed.

- 3 In the  field, fill in the due date and time of the action. When the date arrives, the action will be considered late if it has not been completed yet.

- 4 Click **New**.

↳ The action is created. It can be viewed directly from the list of actions in the **Actions** tab of the record sheet.

To create an action from any tab:

- 1 Click on  on the right of the screen.

- 2 In the creation window, fill in the following fields:

Field	Description
Task	Select the category from the drop-down list. The category's name is filled in automatically. Modify this name if needed. Depending on the selected category, the following fields can be different.
Date	Fill in the due date and time of the action. When the date arrives, the action will be considered late if it has not been completed yet.
Completed	If the box is checked, the action will be completed as soon as it is created. This way, you can quickly create and complete actions that have already been done, for reference purposes.
Assigned to	Fill in the first letters of the employee in charge of the action. The help list is displayed automatically with the relevant employees. Select the desired employee from the help list. By default, the employee creating the action is already filled in.
Comment	Enter a comment to give more details about the action.

- 3 Click **Save**.

↳ The action is created. It can be viewed directly from the list of actions in the **Actions** tab of the record sheet.

11.1.3 From the **Actions** menu

The **Actions** menu displays all actions in one screen, instead of having to go through the opportunity pipeline or a record sheet. This way, a sales person can create, manage and complete actions from one screen using a to-do list interface.

- 1 From the first frame on the left, fill in the action's name in the **Topic** field.
- 2 In the **Organisations & Contacts** field, fill in the first letters of the contact, prospect or customer that is associated with the action. The help list is displayed automatically with the relevant results. Select the desired contact, prospect or customer from the help list.
- 3 In the **Date** field, fill in the due date and time of the action. When the date arrives, the action will be considered late if it has not been completed yet.
- 4 Click on + **Action**.
 - ↳ A list opens to display the different action categories available.
- 5 Select the category from the list.
 - ↳ The action is created. It can be viewed directly from the list of actions in the **Actions** menu.


11.2 SEARCHING FOR AND FILTERING ACTIONS

The **Actions** menu displays all the existing actions of the connected user, of a team or even of another employee. This menu also enables employees to display actions depending on their due date.

Note

The search and filter features only apply to the actions displayed on the screen. Akuiteo does not look for all the actions of the database, which is convenient if there is an important number of actions.

11.2.1 Searching for actions

In the  search field, fill in the first letters of the action's name, the customer, the assigned sales person, and so on. The actions matching the search criteria are updated directly so it is easy to find the desired action.

From the screen's header or the list of actions, it is also possible to narrow down the actions displayed to easily find the desired one:

Field	Description
Assigned to	Select an employee, a team or a department from the drop-down list to only display the actions linked to the selection. <ul style="list-style-type: none">• Me - your actions• All - all existing actions• My team - your actions and your team's actions• My department - your actions and your department's actions

Field	Description
	<ul style="list-style-type: none"> • Other employees - the actions of the selected employee
<i>Due date</i>	<p>Select the actions to be displayed depending on their due date:</p> <ul style="list-style-type: none"> • Late - the actions that are not completed and that are overdue • Today - the actions scheduled for the current day • This week - the actions scheduled for the current week • Next week - the actions scheduled for next week • Upcoming weeks - the actions scheduled for the following weeks • All - all actions with all due dates <p>The number of actions is displayed in brackets for each category.</p>
Sort by	<p>Select how the actions are sorted from the drop-down list.</p> <ul style="list-style-type: none"> • Date - actions are sorted by due date, in ascending or descending order • Customer - actions are sorted by customer, in alphabetical or reversed order • Employee - actions are sorted by the employee assigned, in alphabetical or reversed order

11.2.2 Filtering actions

- From the list of actions, click **Filter**.
↳ The **Advanced filters** window opens.
- In the window, check the relevant boxes for the filters that should be applied. You can combine as many filters as necessary.
- Click **Apply**.
↳ The actions matching the filters applied are displayed. The other actions are hidden.

To delete the filters applied, click **Filter** then **Remove filters**.

11.3 MANAGING ACTIONS

Note

Actions can be managed from multiple access points and the features available depend on the access point. The features that are shared with all access points are described in this chapter. For more information about the features specific to the **Actions** menu, refer to [Managing actions from the Actions menu \(p. 61\)](#).

11.3.1 Opening actions

To modify an action or add items to it, you must open the action itself:

- Click on the desired action in the list of the **Actions** menu.
- From the record sheet of an opportunity, a contact, a prospect or a customer, click on the **Actions** tab then click on the desired action name.

- From the opportunity pipeline or the signature schedule from the **Opportunities** menu, click on the icon on the top right of the opportunity's card then click on the desired action.

11.3.2 Modifying actions

From the action details, modify the necessary values then click **Save**.

All the fields can be modified at any time. You can modify the information specified when creating the action, but also change the associated contacts or customers, the assigned employees or the linked opportunities.

11.3.3 Adding documents to an action


Documents can be added to an action from the details:

- By clicking on the **Upload document** frame.
- By dragging and dropping the document in the **Upload document** frame.

The documents added to an action are displayed in the details. When a document is associated with an action, this document is created for the action's company.

This document can be viewed from the Application Desktop in the documents associated with the action (if the user has the required DMFs) or from a documents search.

To open a document, click on it to download it.

To remove a document, click on  then **Delete**.

11.3.4 Completing actions

When a scheduled action is carried out by a sales person, for example calling back a prospect, the action can be completed to indicate it has been done and the sales person can move on to the next step.

From the action details, check the **Completed** box then click **Save** to complete the action. From the **Actions** menu, you can also check the right box in the list of actions.

When an action is completed, it is removed from the list of actions in the **Actions** menu and it is no longer displayed in the opportunity's card from the **Opportunities** menu. However, completed actions can be retrieved using filter criteria in the **Actions** menu and they are always displayed in the record sheets' **Actions** tab.

11.4 MANAGING ACTIONS FROM THE **ACTIONS** MENU

The following standard features are available from the **Actions** menu: creation, modification, completion, and so on. However, additional features are also available to help employees better manage their schedules and be more productive.


Note

Actions can be managed from multiple access points and the features available depend on the access point. The features that are specific to the **Actions** menu are described in this chapter. For more information about the shared features, refer to [Managing actions \(p. 60\)](#).

11.4.1 Creating actions on the fly

When a sales person wants to complete or delete an action, he/she can create a new action on the fly that retrieves all the information of the source action. This way, the sales person does not have to fill in the same information again and only has to modify what is necessary: the due date, the action category, and so on.

1 From the **Actions** menu:

- Select the desired action, then drag and drop it in the **Complete and create new action** or the **Delete and create new action** frames.
- Click on the desired action to open its details. Click on  on the top right then click **Complete and create new action** or **Delete and create new action**.


2 Confirm the completion or the deletion.

↳ The action is completed or deleted and is no longer displayed in the list. A new action is created automatically with a due date set to the current date. The other fields of the new action are retrieved from the source action.

11.4.2 Rescheduling actions

An action's due date can be rescheduled.

From the **Actions** menu:

- Select the desired action, then drag and drop it in one of the **Reschedule** frames. The dates available are determined automatically using the current date and the due date.
- Click on the desired action to open its details. Click on  on the top right then click **Reschedule...**. Select a new due date then click **Validate**.

The action's due date is updated. Depending on the search and filter criteria, the action can no longer be visible in the list.

11.4.3 Reassigning actions

The employee assigned to an action can be modified.

1 From the **Actions** menu:

- Select the desired action, then drag and drop it in the **Reassign** frame.
- Click on the desired action to open its details. Click on  on the top right then click **Reassign**.

2 In the **Employee** field, fill in the first letters of the employee in charge of the action. The help list is displayed automatically with the relevant employees. Select the desired employee from the help list.

3 Click **Validate**.

↳ The employee is updated. Depending on the search and filter criteria, the action can no longer be visible in the list.


11.5 DELETING ACTIONS

Important

Deleting an action cannot be reversed.

From the action record sheet, click on **Actions** in the header, then click **Delete** and confirm the deletion.

From the **Actions** menu:

- Select the desired action, then drag and drop it in the **Delete** frame. Confirm the deletion.
- Click on the desired action to open its details. Click on  on the top right then click **Delete**. Confirm the deletion.

12 Interface customization

The CRM module can be customized in several ways to match the specific needs of each company, but also the needs of each employee.

In the opportunity, contact, prospect and customer record sheets, it is possible to customize all the fields displayed and the ones that are required. Additionally, when an opportunity moves from one stage to another, the fields that must be filled in to move to the new stage can be customized.

Note

If a field is set up as required in the Application Desktop, it must be set up manually in the portal to also be required there.

12.1 CUSTOMIZING FIELDS IN RECORD SHEETS

By default, the fields displayed in the opportunity, contact, prospect and customer record sheets are the main fields used to create new items. However, all these fields can be customized: you can display or hide fields according to your needs, but you can also decide if a field is required or can be modified.

This customization can be shared with all users or can be specific to each user, depending on the assigned rights:

- DMF 1916** WEB PORTAL SETUP
- DMF 191601 WEB PORTAL SETUP MY CUSTOM FIELDS
- DMF 191602 WEB PORTAL SETUP GENERAL CUSTOM FIELDS

From a record sheet, click on  on the top right of the frame displaying all the fields:

- Select **My custom fields** to display the fields customized by the user.
- Select **General custom fields** to display the custom fields shared with all users.

12.2 CUSTOMIZING FIELDS FOR SALES STAGES

When an opportunity moves to a new stage, it means it is progressing in the sales process. Opportunities that have just been created are added to the first stage. To show opportunities are progressing, they must be moved from stages to stages. The sales person assigned to the opportunity has to fill in pieces of information about the opportunity at each step, but this information can vary. That is why the fields that are required to move to a new stage can be customized.



Example

An opportunity is in the "Product demo" stage. The next stage is the "Negotiation" one. To move the opportunity to the negotiation stage, I must fill in fields regarding the business proposal: the actual proposal, the SIREN and SIRET numbers, and so on.

From the opportunity pipeline, locate the column of the stage you want to set up. This way, when a user moves an opportunity to this stage, the fields set up will have to be filled in.

12.3 SETTING UP THE CUSTOMIZATION

1 To access the customization interface:

- From an opportunity, contact, prospect or customer record sheet, click on  then select **Setup**.
- From the opportunity pipeline, click on  at the top of the column you want to set up.

↳ The customization feature opens and displays two frames: the left frame includes the list of fields that are already displayed in the record sheet, and the right frame includes all the fields available and categorized.

2 In the **Field library**, search for the field you want to add, then drag and drop this field in the **Drag and drop fields here** frame. This frame is located at the top of the list of added fields, as well as at the bottom.

↳ The field is added to the list of fields displayed in the record sheet.

Note

When a field is added, the list is not checked to make sure the field has not already been added. Therefore, there can be duplicates.


3 To set up the layout, open the **Layout** category in the **Field library**. Add a **Title**, **Subtitle** or **Separator** to set up the layout of the fields list. Make sure you modify the names for the titles and subtitles.

Note

The layout cannot be set up for stages.


4 Click on  for the added field:

- Check **Required** so the field must be filled in.
- Check **Read-only** so the field cannot be modified.

5 To change the field's position, click on  on the field's left then move it to the desired position.

6 Click **Save**.

↳ The customization is updated.

From the customization feature, click on  to delete the field from the list or click on **Delete all** at the top to delete all custom fields at once.

Manager module

The **Manager** module enables managers or any person in charge to easily validate leave requests, expense reports or even employee timesheets. It is also possible to approve management objects, such as custom requests or quotations. A specific time review feature is available so that managers can view and validate timesheets, send reminders to employees if they have not completed their timesheet yet, or even complete timesheets of other employees.

The **Manager** module can be accessed by managers or by any person in charge (of employees, of projects, and so on).

Validation of employee documents (p. 67)

When an employee makes a request from the portal or from the Application Desktop, the manager must then process the employee's request in order to validate or reject it. Also, when an employee adds time spent or creates an expense report, the manager must validate or reject them so they are taken into account. [...]

Approval of management objects (p. 72)

From the Application Desktop, employees can request the approval of a manager or of the person in charge so they can make progress on some management objects. For example, when employees create quotations in the Desktop, they might need the approval of a manager or of the person in charge to be allowed to transform these quotations into sales orders. These approval requests are gathered and can be accessed from the portal so the manager can quickly and easily approve the different management objects. [...]

Time review (p. 77)

The time review feature gathers the timesheets of the employees the manager is in charge of, in an overview by week or by month. Managers can look at the timesheets of their employees but also get more details about each time spent. This way, the manager has all the information needed to validate the timesheets of a specific employee, but it is also possible to validate all the timesheets of all the employees the manager is in charge of at once. [...]

13 Validation of employee documents

When an employee makes a request from the portal or from the Application Desktop, the manager must then process the employee's request in order to validate or reject it. Also, when an employee adds time spent or creates an expense report, the manager must validate or reject them so they are taken into account.

A manager can validate three types of documents:

- leave requests;
- timesheets;
- expense reports.

The details of the document can be displayed before the manager validates or rejects it. The manager can also display the request in its context: the employee's schedule can be opened to validate a leave request or the project task tracking can be opened to validate timesheets. Depending on their responsibilities, managers can validate the documents of multiple teams or even validate their own documents.

Validations are managed from the **Validations** menu in the **Manager** module.

13.1 SHOWING DOCUMENTS TO BE VALIDATED

The different validation menus have the same interface, whether it is used to validate leave requests, timesheets or expense reports.

For each screen, the header displays multiple tabs to filter the list of items:



- Select the **My team** tab to display all the employees in your team, meaning all the employees you are directly managing.
- Select the **My teams** tab to display all the employees in all the teams.
- For leave requests, select the **My requests** tab to display your own requests.
- For timesheets, select the **My projects** tab to display the time spent on your projects.

At any time, click on  on the screen's right to update the list displayed.

13.2 MANAGING VALIDATIONS





13.2.1 Leave requests


To access leave requests to be validated, click **Leave requests** under the **Validations** menu.

The **Leave requests** menu displays the list of employees that the manager is in charge of and that have leave requests to be validated. Unfold an employee to display all the leave requests from this employee, or click on  and  to show or hide all the requests from all employees.

Leave requests are displayed as tables, where a line represents a leave request. Requests have separate tables for each leave type: for example one table for paid leaves, another one for additional rest days, and so on.

For each leave request:

- Click on  to open the employee's schedule in a separate window to show the leave request in context. The manager can validate or reject the leave request from this window.
- Click on  to open the details of the leave request in a separate window. These details are the information filled in by the employee when creating the leave request. The manager can validate or reject the leave request from this window.
- Click on  to reject the leave request. Fill in the rejection reasons in the window then click **Validate** to confirm the rejection.
- Click on  to validate the leave request.

To cancel the validation or the rejection of a leave request, click on . The cancellation is only available for validated or rejected leave requests.

13.2.2 Timesheets





To access timesheets to be validated, click **Time** under the **Validations** menu.

The **Time** menu displays the list of timesheets to be validated for the given project or employee. Unfold a project or an employee to display all the timesheets linked. It is possible to validate timesheets:

- by project if the connected user is a project manager;
- by employee if the connected user manages employees.

Timesheets are displayed as tables, where a line represents a block of time.

For each time:

- Click on  to open the project's task tracking in a separate window to show the project's workload. The manager can validate or reject the time from this window.
- Click on  to open the details of the time in a separate window. These details are the information filled in by the employee when creating the time.
- Click on  to reject the time. Fill in the rejection reasons in the window then click **Validate** to confirm the rejection.
- Click on  to validate the time.

To cancel the validation or the rejection of a time, click on . The cancellation is only available for validated or rejected time.

Reference

The **Time** menu can also be used to reassign timesheets and to validate multiple lines at once. For more information, refer to [Validating and reassigning multiple time entries at once \(p. 69\)](#).

13.2.3 Expense reports

Important

If adding a receipt has been set up as required for the corresponding expense types, the expense report will be checked when it is validated. If required receipts are missing, the expense report cannot be validated. It is still possible to reject it.

Note





If approvals are set up for expense reports, it is also possible to approve expense reports or deny individual expenses from the **Approvals** menu in the **Manager** module.


To access expense reports to be validated, click **Expense reports** under the **Validations** menu.

The **Expense reports** menu displays the list of employees that the manager is in charge of and that have expense reports to be validated. Unfold an employee to display all the expense reports of this employee. Depending on the processes used in the company, an expense report could have to be completed by the employee before it is transferred for validation.

Expense reports are displayed as tables, where a line represents an expense report.

For each expense report:

- Click on  to show the details of the expense report and its expense lines in a separate window. Click on an expense line in the table to display its details. The manager can validate or reject the expense report from this window and can also publish the report.
- Click on  to publish the expense report. You must previously set up report templates for expense reports.
- Click on  to reject the expense report. Fill in the rejection reasons in the window then click **Validate** to confirm the rejection.
- Click on  to validate the expense report.


To cancel the validation or the rejection of an expense report, click on . The cancellation is only available for validated or rejected expense reports.

13.3 VALIDATING AND REASSIGNING MULTIPLE TIME ENTRIES AT ONCE

From the time validation screen, it is possible to validate and reassign multiple lines at once. These features are available from the header of a list of time entries.

13.3.1 Validating multiple time entries at once

- 1 From the **Time** menu, select the desired tab to display the list of projects or the timesheets of a team, then unfold the project or the employee to display the time spent.
- 2 Check the boxes on the left to select each line. To select all the lines at once, check the box in the list's header, on the left of the **Actions** button.

- 3 Select the validation status code from the drop-down list in the list's header. Time validation status codes can be set up from the Application Desktop and are used to define different levels of validation, for example *Validated by project manager* and *Validated by manager*.
- 4 Click on  in the list's header.
 - ↳ The time entries checked are validated with the selected validation status code.

13.3.2 Reassigning multiple time entries at once

- 1 From the **Time** menu, select the desired tab to display the list of projects or the timesheets of a team, then unfold the project or the employee to display the time spent.
- 2 Check the boxes on the left to select each line. To select all the lines at once, check the box in the list's header, on the left of the **Actions** button.
- 3 Click **Actions > Reassign multiple time** in the list's header.
- 4 In the window, fill in the following fields:
 - the **Customer**;
 - the **Project, Phase, Sub-phase** and **Task**;
 - the **Action** code;
 - the **Comment** if needed.
- 5 Click **Reassign**.
 - ↳ The time entries checked are reassigned to the selected customer and project.



13.4 CHANGING THE MANAGER


If a manager has the necessary rights or if the rights have been delegated, it is possible to select another manager in the validation screens in order to validate documents for this manager. Delegations are managed from the Application Desktop.

Example

The manager of the A department is on holidays from February 1 to 15. During this period, the rights are delegated to the manager of the B department.

When the manager of the B department connects to the portal, he can access the feature for changing managers. He can select the manager of the A department to validate the leave requests, the timesheets or the expense reports of the A department.

- 1 From one of the validation menus, click on  on the top right of the screen.
- 2 In the window, select the manager then click **Validate**.
 - ↳ The validation menu displays the leave requests, the timesheets or the expense reports to be validated by the selected manager so the connected user can validate these documents for the manager. The name of the selected manager is added next to the  icon.

To remove this manager, click on the  icon associated with the manager's name, on the top right of the screen.

13.5 VIEWING THE HISTORY

The validation history can be accessed for each validation menu from the **History** tab:

- The leave request history displays all the requests validated by the manager.
- The time history displays the timesheets validated by the user over the last two months.
- The expense report history displays all the expense reports validated by the manager.

14 Approval of management objects

From the Application Desktop, employees can request the approval of a manager or of the person in charge so they can make progress on some management objects. For example, when employees create quotations in the Desktop, they might need the approval of a manager or of the person in charge to be allowed to transform these quotations into sales orders. These approval requests are gathered and can be accessed from the portal so the manager can quickly and easily approve the different management objects.

A manager can approve seven types of management objects:

- quotations;
- sales orders;
- quotes;
- purchase orders;
- purchase invoices;
- expense reports;
- custom requests, that can also be requested from the portal's **Employee** module.


The details of the management object can be displayed before the manager approves or denies it. The manager can get a preview of the documents linked to the management object, can download these documents, can send emails to the employee who requested the approval or even generate the payment authorization for purchase invoices. For expense reports, it is also possible to deny some expense lines that should not be refunded to the employee, while approving the expense report as a whole. Depending on the setup, managements objects can be approved by multiple people: it is a multiple-level approval.

Approvals are managed from the **Approvals** menu in the **Manager** module.

14.1 SEARCHING FOR AND FILTERING APPROVAL REQUESTS

The **Approvals** menu displays all the existing approval requests of the connected user or of another employee. This menu is used to view all the management objects or the custom requests waiting to be approved, the ones that have already been approved as well as the ones that have been denied.

14.1.1 Searching for approval requests

In the  search field, fill in the first letters of the custom request's name, the business document, the requester or even the project. The approval requests matching the search criteria are updated directly so it is easy to find the desired approval request.

From the screen's header, it is also possible to narrow down the approval requests displayed to easily find the desired one:

Field	Description
Sort by	Select how the approval requests are sorted from the drop-down list.

Field	Description
	<ul style="list-style-type: none"> • Date - approval requests are sorted by date, in ascending or descending order • Third-party - approval requests are sorted by requester, in alphabetical or reversed order • Amount - approval requests are sorted by the amount associated with the management object, in ascending or descending order
Approver	<p>Select the employee from the drop-down list to display the approval requests assigned to this employee.</p> <p>By default, the connected user is selected.</p>

14.1.2 Filtering approval requests

Approvals can be filtered by type (quotation, order, custom request, and so on) or by approval state (to be approved, approved, denied).

- 1 From the list of approval requests, click **Filter**.
↳ The **Advanced filters** window opens.
- 2 In the window, check the relevant boxes for the filters that should be applied. You can combine as many filters as necessary.
- 3 Click **Apply**.
↳ The approval requests matching the filters applied are displayed. The other approval requests are hidden.

To delete the filters applied, click **Filter** then **Remove filters**.

14.2 MANAGING APPROVAL REQUESTS

14.2.1 Opening approval requests

To approve or deny an approval request, the request must be opened.

To do this, click on the desired approval request in the list of the **Approvals** menu. The approval request's details is displayed on the right of the screen.

14.2.2 Approving requests

- 1 Open the approval request then click on **Approve**.
↳ A window opens.
- 2 In the window, enter a **Comment** if needed then click **Confirm**.
↳ The approval request is approved.

To remove the approval, open the approved request, click on **Remove approval** then confirm the removal.

Note

Once all approvers of different ranks have approved a purchase invoice, the invoice's payment authorization reaches 100%. The payment authorization's date is the date of the last approval.


14.2.3 Denying expenses in an expense report


For an expense report to be approved, it is possible to deny some expenses while approving the expense report as a whole. This way, approved expenses can be refunded and denied expenses will not be taken into account for the total amount to be refunded of the expense report.

Example

An employee's expense report contains an expense with errors, such as a travel expense which was not for professional travel purposes. However, all the other expenses in the expense report can be refunded.

The approver can deny the specific expense with errors and then approve the expense report.


- 1 From the details of an expense report's approval request, locate the expense to be denied in the expense list. You can click on ► to the left of each expense to display its details.
- 2 For the expense line, click on  in the **Deny** column.
- 3 In the denial window, fill in the reasons for this denial, then click **Confirm**.
↳ The expense has been denied. The line is crossed out and displayed in red. The amount of the denied line is deducted from the **Total refunded in EUR** amount displayed at the bottom of the expense list.

To cancel the denial, click on  in the **Deny** column then confirm the cancellation. When the denial is canceled, the refunded amount is updated with the expense's original amount.

14.2.4 Modifying expenses in an expense report

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For an expense report to be approved, it is possible to modify some expenses of another employee before approving the expense report. All the rules, all the expense report profiles and all the refund thresholds applied are the ones set up for the expense report's employee.

- 1 From the details of an expense report's approval request, locate the expense to be modified in the expense list. You can click on ► to the left of each expense to display its details.
- 2 For the expense line, click on  in the **Details** column.
- 3 Modify the fields needed in the expense form then click on **Save**.
↳ The expense has been modified.

14.2.5 Denying requests

- 1 Open the approval request then click **Deny**.


↳ A window opens.

- 2 In the window, enter a **Comment** if needed to explain why it is denied then click **Confirm**.

↳ The approval request is denied.

14.2.6 Sending emails to the employee requesting the approval

From the details of an approval request, it is possible to send an email to the employee who requested the approval in order to discuss about the request.

- 1 From the details of an approval request, click on .

↳ The **Send email** window opens. The email address of the employee who requested the approval is filled in automatically for the recipient. The email's subject and body are also already filled in with the request's information.






- 2 Modify the desired information then click **Send**.

↳ The email is sent to the employee.

14.2.7 Viewing linked documents

From the details of an approval request, click on  to view the linked documents.

A preview of the linked documents is displayed in a separate window, on the left of the request's details. The following actions are available from this window:

- view the different documents using the left and right arrows
-  download the documents
-  zoom in and  zoom out on a document
- rotate the preview to the left  or to the right .


Click on  to close the preview window.

14.2.8 Downloading linked documents

From the details of an approval request, click on  to download the linked documents.

14.2.9 Publishing approval requests

To publish an approval request, you must previously set up report templates for approvals.

- 1 From the details of an approval request, click on .

↳ A window opens.

2 In the window:

- Select the report template from the drop-down list of the **Template** field.
- Click on the format in which the approval request will be saved (for example .pdf or .doc).
- Check the **Link document** box to automatically add the report to the linked documents.

3 Click **Validate**.

↳ The approval request is published and saved on your computer.

14.2.10 Removing approvals

Important

Approvals cannot be removed for:

- quotations and quotes that are signed or archived;
- orders and expense reports that are validated;
- purchase invoices with payment authorizations at 100%.

From the details of an approved or of a denied request, click on **Remove approval** then confirm.

15 Time review

The time review feature gathers the timesheets of the employees the manager is in charge of, in an overview by week or by month. Managers can look at the timesheets of their employees but also get more details about each time spent. This way, the manager has all the information needed to validate the timesheets of a specific employee, but it is also possible to validate all the timesheets of all the employees the manager is in charge of at once.

If some employees are late for completing their timesheet (of the week or of the month), the manager can send them reminders directly from the time review feature. The manager can also complete employees' timesheets or cancel the completion if needed.

The time review is managed from the **Time review** menu in the **Manager** module.

15.1 SEARCHING FOR AND FILTERING TIMESHEETS

The **Time review** menu contains two types of views:


- an overview that displays the timesheets of all the employees in a team, monthly or weekly;
- a detailed view that displays all the timesheets of a specific employee, monthly or weekly.

To access the overview, click on the **Time review** menu. From this overview, click on an employee's time block to access the detailed view.

Note

The search and filter features only apply to the timesheets displayed on the screen. Akuteo will not look for the timesheets that have been entered before or after the displayed month or week.

15.1.1 Searching for timesheets

In the  search field, fill in the first letters of the employee's name. The employees matching the search criteria are updated directly so it is easy to find the desired timesheets.

15.1.2 Filtering timesheets

The filter criteria are available in the right panel. Select the filters to apply to only display the desired employees and timesheets.

Field	Description
Manager	Select the manager from the drop-down list. By default, the connected user is filled in. If the manager is modified, the list of employees displayed is updated accordingly.
Time review	This filter is only available in the overview. Click on a button to display the employees linked to the selection:

Field	Description
filters	<ul style="list-style-type: none"> • Remind - only displays the employees that can be sent reminders because they have not yet completed their timesheet for the month or the week • Validate - only displays the employees with completed timesheets that must be validated • All - displays all employees
Timesheet filters	<p>Click on a button to display the timesheets linked to the selection.</p> <p>Filters available in the overview and in the detailed view:</p> <ul style="list-style-type: none"> • Completed - only displays completed timesheets, both validated and not validated • To complete - only displays timesheets that have not been completed yet • All - displays all timesheets <p>Filters only available in the detailed view:</p> <ul style="list-style-type: none"> • Validate - only displays timesheets that have not been validated yet • Validated - only displays validated timesheets • All - displays all timesheets
Show days for the month of	<p>In the overview, this filter is only available for the week display. This filter is only available if the week displayed is overlapping two months. The user can choose which month to display for the week's timesheets.</p> <div> <p>Example</p> <p>The week from November 26 to December 2 is overlapping two months. The user can use this filter to only display the timesheet for the month of November or December.</p> </div>
Show current month only	<p>In the overview and in the detailed view, this filter is only available for the month display. Activate this filter to only display the timesheets entered for the month displayed. When the filter is deactivated, the timesheets are displayed in whole weeks, from Monday to Friday.</p> <div> <p>Example</p> <p>The first day of the month displayed is a Tuesday. When the filter is activated, the timesheets displayed go from the first day to the last day in the month. When the filter is deactivated, whole weeks are used: timesheets entered for the last day of the previous month, meaning timesheets entered on Monday, are added to have the whole week displayed, from Monday to Friday.</p> </div>

15.2 VIEWING TIMESHEETS

15.2.1 For multiple employees

The overview is accessed directly from the **Time review** menu. This overview gathers all the employees managed by the connected user or by the selected manager. This way, the manager gets an overview of all the timesheets validated, not validated or not entered yet for all the employees.

The overview can be displayed by month or by week. To do this, click on the **Month** or **Week** display on the top right of the screen. Depending on how timesheets are completed in the company (monthly or weekly),

the features available are different between the two displays. To navigate from one month or week to another, use the left and right arrows on the top left of the screen. Click **Current month** or **Current week** to come back to the current month or week.

From the list of employees in a team:

- Check the box of one or multiple employees for reminders or validation. Click on the box in the list's header to select all employees at once.
- When validating timesheets monthly, click on ▼ to show the timesheet of an employee and see the details week by week.
- A progress bar visually displays validated timesheets and the time that has not been validated or entered yet, using different colors to differentiate them. Hover over each progress bar to display details about the timesheets and the color code.

15.2.2 For an employee

The detailed view is accessed by clicking on the time progress bar of an employee from the **Time review** menu. This view displays the details of the employee's timesheets, meaning all the time spent each day. This way, timesheets can be validated individually.

The detailed view can be displayed by month or by week. To do this, click on the **Month** or **Week** display on the top right of the screen. To navigate from one month or week to another, use the left and right arrows on the top left of the screen. Click **Current month** or **Current week** to come back to the current month or week.

The employee's name is displayed at the top of the screen. Click on the ◀ or ▶ arrows to navigate among the list of employees and display their timesheets.

From the list of timesheets:

- Check the box of one or multiple lines for completion, reminders or validation. Click on the box in the list's header to select all timesheets at once.
- Hover over the 👁 icon to display the time's details (customer code, project code, phase code and comment).

Click **Back** on the top left of the screen to go back to the time review's overview.


15.3 SENDING REMINDERS TO EMPLOYEES

When employees are sent reminders, automatic emails are sent to employees to let them know they need to input or complete their timesheet for the week or for the month. Employees that are late are reminded to input and/or complete their timesheet so they can be validated by the manager.

Employees can be sent reminders:

- If there is still time left to input for the month or the week. In this case, the email will remind employees to input their time.
- If the timesheet is not completed for the month or the week. In this case, the email will remind employees to complete their time.
- If there is still time left to input and if the timesheet is not completed for the month or the week. In this case, the email will remind employees to input their time and then complete their timesheet.

15.3.1 Sending reminders to an employee

From the overview, display the desired month or week, click on  for the employee to remind then confirm the reminder.

From the detailed view of an employee, display the desired month or week, click **Remind** on the top right of the screen then confirm the reminder.

15.3.2 Sending reminders to multiple employees

From the overview, display the desired month or week. Check the box on the left to select the desired employees, click **Remind** in the list's header then confirm the reminder.

15.3.3 Sending reminders to all employees

From the overview, display the desired month or week. Make sure there is no employee selected, then click **Remind all** in the list's header and confirm the reminder.


15.4 COMPLETING TIMESHEETS

If an employee does not complete the timesheet for the week or the month, the manager can send a reminder email. Managers can also choose to complete timesheets for their employees, by forcing the completion. If an employee needs to modify a timesheet that has already been completed, the manager can cancel the completion from the time review feature.

Note


The completion can be accessed either from the month display if timesheets are completed monthly, or from the week display if timesheets are completed weekly.

15.4.1 Completing the timesheet of an employee

From the overview, display the desired month or week, click on  for the employee then confirm the completion.

From the detailed view of an employee, display the desired month or week, click **Complete month** or **Complete week** on the top right of the screen then confirm the completion.

15.4.2 Canceling the completion of a timesheet

From the overview, display the desired month or week, click on  for the employee then confirm the cancellation.

From the detailed view of an employee, display the desired month or week, click **Cancel completion** on the top right of the screen then confirm the cancellation.


15.5 VALIDATING TIMESHEETS

When the timesheet of an employee is completed for the month or the week, the manager or the person in charge of validation can validate it. Validating means these timesheets have been checked and are allowed.


Timesheets can be validated as soon as the employee has input them. The validation feature is available when an employee has added time entries that are not validated yet, meaning entries that have a *BRUT* status. If all the time entries of an employee are validated, the validation feature is no longer available.

Depending on the validation process of the company, timesheets can be validated by multiple people. For example, the timesheets of a team can first have to be validated by the project manager, and then by the team's manager. The time review feature can be used to manage multiple levels of validation, by modifying the validation status code. Time validation status codes can be set up from the Application Desktop and are used to define different levels of validation, for example *Validated by project manager* and *Validated by manager*.

15.5.1 Validating the timesheet of an employee

From the overview, display the desired month or week, click on  for the employee, select the validation status code then confirm the validation. The timesheet is validated for the month or the week.

From the detailed view of an employee, display the desired month or week. It is possible to validate all the time entries displayed or to validate them individually:

- To validate all the time entries displayed at once, click **Validate all** on the top right of the screen, select the validation status code then confirm the validation. In this case, all the time entries displayed are validated with the selected status code. If some time entries were already validated, the previous status code is replaced.
- To validate multiple lines at once, check the boxes on the left to select each line. Click **Validate** on the top right of the screen, select the validation status code then confirm the validation. In this case, the selected time entries are validated with the selected status code. If some time entries were already validated, the previous status code is replaced.
- To validate a single line, click on  for the relevant line, select the validation status code then confirm the validation.

Note

If a line must be rejected, meaning the status code selected is *REJECTED*, a reason must be filled in to confirm the rejection.

15.5.2 Validating the timesheets of multiple employees

From the overview, display the desired month or week. Check the box on the left to select the desired employees, click **Validate** in the list's header, select the validation status code then confirm the validation.


15.5.3 Validating the timesheets of all employees

From the overview, display the desired month or week and make sure no employee is selected. Click **Validate all** in the list's header, select the validation status code then confirm the validation.

15.5.4 Canceling the validation of timesheets

If needed, the validation can be canceled, meaning the time entries go back to the *BRUT* status code. The validation can only be canceled from the detailed view of an employee's timesheet.

From the detailed view, display the desired month or week. It is possible to cancel the validation for all the time entries displayed or for each line individually:

- To cancel the validation for all the time entries displayed at once, click **Validate all** on the top right of the screen, select **Cancel validation** then confirm the cancellation.
- To cancel the validation of multiple lines at once, check the boxes on the left to select each line. Click **Validate** on the top right of the screen, select **Cancel validation** then confirm the cancellation.
- To cancel the validation of a single line, click on  for the relevant line then confirm the cancellation.

Reports module

The **Reports** module is used to display and download customized reports.

This module can be accessed by employees that are allowed to make reporting.

[Reports \(p. 84\)](#)

Reports are set up from the Application Desktop and can be shared on the portal. The content and the layout of a report can be entirely customized to meet any specific needs. A report is used to display and combine any desired information. For example, a company can decide to create a report to display the employees' leave requests for the current month or even to track the company's revenue. [...]

16 Reports

Reports are set up from the Application Desktop and can be shared on the portal. The content and the layout of a report can be entirely customized to meet any specific needs. A report is used to display and combine any desired information. For example, a company can decide to create a report to display the employees' leave requests for the current month or even to track the company's revenue.

Depending on the setup, additional parameters might be required before a report can be published (for example the employee's code or a specific date). Also, some reports might only be available in one format whereas other reports might be downloaded in multiple formats.

Reports are managed from the **Reports** module.


16.1 OPENING REPORTS

The **Reports** module is divided into multiple menus:

- The **Home** menu automatically displays a report. This report can be changed at any time: the connected user decides which report to display in the home tab.
- The **My reports** menu is used to add reports as favorites.
- The other menus display a list of all the existing reports, by category.


These same menus are also available as tabs in each menu.

To open a report from the **My reports** menu or from the other categorized menus, click on the desired report. Depending on the report's setup, a window can open to select or fill in additional parameters. The report is displayed directly in the portal with the relevant information.

Click on  to download the report in the desired format.

Click on  to come back to the list of reports in the corresponding tab.

16.2 DOWNLOADING REPORTS

From the **My reports** menu or from the other categorized menus, hover over the desired report then click on  from the top bar. The report is downloaded on your computer.

Depending on the report's setup, a window can open to enable users to:


- fill in additional parameters;
- select the format to save the report.

16.3 ADDING REPORTS TO QUICK-ACCESS SCREENS



16.3.1 Home

The **Home** menu automatically displays a report. Each user can decide which report to display in this tab.

To add a report to the **Home** menu:

- Hover over the desired report from the **My reports** menu or from the other categorized menus, then click on  from the top bar.
- Select the desired report, then drag and drop it in the **Home** tab, in the screen's header.


Since there can only be one report displayed in the **Home** menu, the report is replaced each time a user adds a new report.


From the **Home** menu, click on  to download the report in the desired format, and click on  to remove the report from this menu.

16.3.2 My reports

The **My reports** menu enables users to add reports as favorites in order to quickly find them.

To add a report to the **My reports** menu:

- Hover over the desired report from the categorized menus, then click on  from the top bar.
- Select the desired report, then drag and drop it in the **My reports** tab, in the screen's header.

To remove a report from the **My reports** menu, hover over the desired report then click on  from the top bar.