



**akuiteo**

BUSINESS SOFTWARE

User Guide

# TOOLS

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# 1 Preface

## 1.1 REVISIONS

**Revision 1**

Published in April 2021

## 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 Creating an event

You can create events for different types of objects:

- third-parties (customers, prospects, suppliers, ...)
- projects
- management objects (sales and purchase)
- other objects (maintenance contracts, cost assessment, phases, sub-phases, ...)

There are three types of events: **tasks**, **appointments** and **notes**. Tasks and appointments can be viewed from the employee's schedule, in read-only mode only. To modify these events, double-click on the relevant schedule area to open the record sheets.

### 2.1 CREATING A NEW EVENT



If an event is created from an Akuiteo module, for example the Purchase, People or Projects modules, the module's main information will be used.

The link to the event can be viewed from the Linked events tab in the record sheets of the linked third-parties or management objects.

To create a new event, open the **Tools** menu and select the event to create: **New task / New appointment / New note**.

### 2.2 SPECIFYING THE EVENT'S MAIN INFORMATION

- 1 In the **Details** tab, enter the event's category and label/object.
- 2 Specify the **Owner**. By default, the employee associated with the connected user is automatically displayed. You can select a different owner if needed, for example if an appointment or event must be displayed in someone else's reminders.
- 3 Indicate if the event is linked to the help desk by checking the relevant box.
- 4 Fill in the dates and hours linked to the event:
  - date and due time to specify when a **task** must be completed as well as its state (the different states are set up in Akuiteo and match the Outlook's states: Not started, In progress, Completed, ...)
  - **appointment**'s start and end dates and whether it is a full day or not
  - end date of a **note**'s validity
- 5 Enter the event's level of importance from the **Priority** drop-down list. For tasks, you can also select the state and the percentage of completion.
- 6 [Appointments and tasks only] Check the **Callback** box and specify a date and time for the reminder (demo reminder, prospect callback). The reminder date will be used in the **Events** dashboard.

- 7 Add a comment in the **Notes** field.
- 8 Link a third-party (employee, customer/prospect, supplier or another third-party) to the event by clicking on . A window is displayed to fill in parameters according to the third-party to link:
  - Employee: code and name
  - Customer/Prospect/Site/Contact: name of the company, site and contacts
  - Supplier/Site/Contact: name of the company, site and contacts
  - Other third-party: type (competitor, partner, and so on), name, site
- 9 Link one of the following types of management objects by clicking on , located under the linked third party table:
  - sales: opportunity, quotation, order, etc.
  - purchase: quote, order, etc.
  - help desk: maintenance contract, issue, etc.
  - other: internship, session, country

## 2.3 ALLOWING USERS TO VIEW AN EVENT

Depending on the event's level of confidentiality, you can indicate an accreditation level to view or modify the event.

- 1 Click on the **Authorization** tab and indicate the accreditation level to be able to view the event:
  - Unrestricted.
  - If you select **Accreditation level equal to / higher than**, you must specify a number between 0 and 999 in the **Accreditation levels** field, referring to the accreditation level specified in the user record sheet.
  - If you select **Allowed employees (not managed on the customer portal)**, you can specify the employees allowed to view the record sheet in the **Allowed resources** table.
- 2 Select the relevant employees to add them to the list.


## 2.4 CREATING A NEW EVENT LINKED TO THE CURRENT EVENT

This option enables you to create a new event record sheet from the content of a previous event. For example, it is possible to create an appointment from a note or a task.

- From the event, go to **Edit > New event relating to the current event** and select either task, appointment or note.

## 2.5 TURNING THE EVENT INTO AN APPOINTMENT, TASK OR NOTE

This feature enables you to modify either the content or the type of an event (appointment, task, note) without having to modify all the content.

- From the event, go to **Edit > Modify > Convert to appointment / task / note** depending on the event type.
- You can also access it by clicking on the arrow on the right of the  icon and select **Convert to ...**

## 2.6 VIEWING AND CREATING A CONFIDENTIAL EVENT BY DEFAULT

- 1 Go to **Tools > Setup > General setup > Special parameters > Management rules**.
- 2 Activate the V9\_CONFID rule and save.
- 3 Go to **Tools > Setup > General setup > Security > DMF management**.
- 4 Activate the following DMFs:
  - 1701\*\* DATA EVENTS \*
  - 170101 DATA EVENTS SHOW CONFIDENTIAL EVENTS
  - 170201 DATA EVENTS NEW DEFAULT CONFIDENTIAL EVENT

The next event created will automatically be considered as confidential. You will also be able to view confidential events.

## 2.7 AUTOMATING EVENT CATEGORIES

You can specify default categories to display in notes created from a schedule's appointment or an email.

To do so:

- 1 Go to **Tools > Setup > General setup > Cross-cutting > Event categories**.
- 2 Open a category or create a new one.
- 3 Under the **Additional information** section, check the **Default from the calendar** and/or the **Default from the emails** boxes.
- 4 Validate.
- 5 Open a calendar and add an event.
- 6 Right-click and select **Create a note**.

The category is indicated by default.

Two user preferences are also available from **Edit > Preferences > General**.

- Default category for the calendar
- Default category for emails


When creating an event, Akuiteo will check whether the user has set a customized preference. Otherwise, the default category will be used.



## 3 Modifying an event

### 3.1 SENDING AN EVENT BY EMAIL

This feature enables you to send all the information related to the event by email.

- 1 From the event, go to **Edit > Send by email** or click on .
- 2 In the **Send by email** screen, specify the desired employees as recipients.
- 3 Select the email template and enter a subject.
- 4 Select the email's formats, attached documents if needed, and validate.

The email including the event's information is sent.

### 3.2 ARCHIVING AN EVENT

This feature enables you to archive or to cancel the archiving of the current event. Once archived, it cannot be modified nor deleted, and it is not displayed in lists by default (e.g. Dashboard). The **archived** indicator is displayed in the event record sheet.

- From the event, go to **Edit > Archive the event**.

You can also archive an event linked to a third-party or an object directly from a record sheet:

- 1 Open the record sheet (e.g. customer record sheet).
- 2 From the **Linked events** tab, right-click on the event and select **Archive the event**.

The archived event is no longer displayed in the list.

### 3.3 FREEZING AN EVENT

This feature enables you to freeze the current event. A frozen event cannot be modified or deleted. The **frozen** indicator is displayed in the event record sheet.

- From the event, go to **Edit > Freeze the event**.

### 3.4 DUPLICATING AN EVENT

This feature called **New event relating to the current event** enables you to duplicate an existing event. This saves time by keeping custom data and linked third-parties in the new record sheet.

## 3.5 MANAGING EVENT CONFIDENTIALITY

This feature enables you to make an event confidential or to make it accessible to everybody.

To automate event confidentiality, refer to the [Viewing and creating a confidential event by default \(p. 7\)](#) section.

- From the event, go to **Edit > Manage event confidentiality**.

## 3.6 CREATING OPPORTUNITIES

This feature enables you to turn an event into a sales or a training opportunity and therefore start the sales or training process. The opportunity is already filled in with the event's information.


- From the event, go to **Edit > New management object > New opportunity** or click on .

# 4 Creating a document

Documents are generally linked to a third-party or a management object. To automatically link reports with management objects, the relevant user preference must be checked (**Edit > Preferences > General > Documents**).

If it is checked, record sheets (project, customer, and so on) have a **Linked documents** tab so you can display a document with one click.

When a document is linked to a third-party record sheet (customer, supplier, and so on) created on \*\*\*\*\*, the document can be downloaded by all coworkers, no matter the company they are in. However, the document record sheet can only be opened and modified by users from the same company.


It is possible to make one or several original PDF documents required for the following management objects: expense reports, sales invoices and credit notes, purchase invoices and credit notes. An original document is similar to a locked document, meaning it cannot be modified or deleted to preserve its authenticity. In the **Linked documents** tab list, an original document is identified by the  icon in the **Original** column.

## 4.1 CREATING A DOCUMENT RECORD SHEET


- 1 Go to **Tools > New document**.
- 2 Select your document on your workstation using the desired method:
  - URL: specify the web or network path needed to open the document.
  - UNC: select the network file.
  - ... : select a document and store it in Akuiteo.

### Note

From another type of record sheet (customer, invoice, products, and so on), drag and drop a file. The **Linked documents** tab is automatically displayed and a **Document** record sheet is also created.

- 3 Enter the document's version number and family, as well as the document properties such as its title, language, creation or modification dates.
- 4 Under the **Publication** section, enter the document's publication period and define if it should be published on the Customer Portal.
- 5 Under the **Keywords** section, enter keywords regarding the document so that you can easily search for it.
- 6 Under the **Linked third party** section, link a third-party (employee, customer/prospect, supplier or another third-party) to the document by clicking on . A window is displayed to fill in parameters according to the third-party to link:

- Employee: code and name
- Customer/Prospect/Site/Contact: name of the company, site and contacts
- Supplier/Site/Contact: name of the company, site and contacts
- Other third-party: type (competitor, partner, and so on), name, site

**7** Link one of the following types of management objects by clicking on , located under the linked third party table:

- sales: opportunity, quotation, order, etc.
- purchase: quote, order, etc.
- help desk: maintenance contract, issue, etc.
- other: internship, session, country

## 4.2 ALLOWING USERS TO VIEW A DOCUMENT

Depending on the document's level of confidentiality, you can indicate an accreditation level to view or modify the document.

**1** Click on the **Authorization** tab.

**2** Indicate the accreditation level to be able to view the document:

- Unrestricted.
- If you select **Accreditation level equal to / higher than**, you must specify a number between 0 and 999 in the **Accreditation levels** field, referring to the accreditation level specified in the user record sheet.
- If you select **Allowed employees (not managed on the customer portal)**, you can specify the employees allowed to view the record sheet in the **Allowed resources** table.

## 4.3 VIEWING THE HISTORY OF DOCUMENTS AND VERSIONS

These tabs provide information about changes made to the document. You can also check whether your customer has downloaded the document shared on the Customer Portal.

## 4.4 DUPLICATING A DOCUMENT RECORD SHEET

### Note

An original document cannot be duplicated.

Prerequisites: DMF 100114 OFFICE AUTOMATION WRITE DUPLICATE

**1** Open a document record sheet.

**2** Go to **Edit > Duplicate**.

The document record sheet is duplicated.

## 4.5 LINKING SEVERAL DOCUMENTS TO SEVERAL THIRD-PARTIES


DMF	100115 OFFICE AUTOMATION WRITE ADD TARGET THIRD-PARTY
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There must already be an existing target. For more information about targets, read the CRM and Third-Parties User Guide.

From the document search results

- 1 From the search results, select the desired documents.
- 2 Right-click and click on Add third parties from a target.
- 3 In the window that opens, select the target code and validate.

From a new or an existing document record sheet

- 1 Create a document record sheet or open the desired one.
- 2 Click on  on the right.
- 3 In the window that opens, select the target code and validate.

The documents can now be accessed by the relevant third-parties.

If these documents are published on the Customer Portal, they can also be viewed from the **Documents** tab.

## 4.6 LOCKING AND UNLOCKING A DOCUMENT RECORD SHEET

- 1 Activate the following DMFs: 100116 OFFICE AUTOMATION WRITE LOCK and 100122 OFFICE AUTOMATION WRITE UNLOCK LINKED DOCUMENT.
- 2 Open a document record sheet and go to **Edit > Lock the document**.

To unlock it, open the document record sheet again and go to **Edit > Unlock the document**.

You can also lock documents from the search results.

- 1 Search for documents.
- 2 In the search results, right-click on the document to lock.
- 3 Select **Lock / Unlock**. An icon shows that the document is locked.

To unlock it, right-click on the line again and click on **Lock / Unlock**.

# 4.7 REMOVING THE ORIGINAL INDICATOR FROM A DOCUMENT

DMF	100123 OFFICE AUTOMATION WRITE REMOVE ORIGINAL INDICATOR ON PDF
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A management object can have one or multiple original documents. This Original indicator can be removed, for example if the management object has been modified.

To remove the Original indicator:

- from the **Linked documents** tab, right-click on the Original document then click on **Remove Original indicator**;
- from the Original document's record sheet, click on **Edit > Remove Original indicator**.

# 5 Managing reports and emails

These features enable you to manage and deliver Akuiteo data using several media.

Management screens for reports, emails and Outlook synchronization are available from the menu bar via **Tools** > click on the desired option.

## 5.1 SUMMARY REPORTS

Unlike standard reports that are set up in a specific context, summary reports can be started out of context.

The report must contain its own queries to be able to retrieve the data to display. These reports are developed with the BIRT design tool. To learn more about BIRT, please contact your Akuiteo project manager.

## 5.2 EMAIL MANAGEMENT

This feature enables you to search for and display the emails included in an Outlook directory, directly from Akuiteo.

## 5.3 SYNCHRONIZATION OF SCHEDULES

It is possible to synchronize an Outlook calendar with the content from the Akuiteo's **My schedule** record sheet. The items that must be synchronized (events, project tasks...) are defined in the user preferences.

## 5.4 SYNCHRONIZATION OF CONTACTS

### Important

The synchronization of contacts with Outlook uses a Windows plugin. Therefore, this synchronization cannot be used with Mac.

### Note

The list of contacts to synchronize is stored by default on the user's workstation. Do not forget to save user preferences in the database to prevent losing them if the workstation is changed.

The contacts available in Akuiteo can be synchronized with your Outlook's contact list. This synchronization is bidirectional: during the synchronization, the contacts created or modified in Akuiteo are created or modified in your Outlook's contact list, and vice versa.

### Identifying contacts to synchronize

Contacts must be manually added to the Outlook synchronization from the Application Desktop:

- 1 From the **People > Contacts** menu, search for contacts with the desired criteria.
- 2 Select the desired contact(s) from the search results.
- 3 Right-click on the selection and click on **Add to Outlook synchronization**, then confirm.
  - ↳ The contacts will be taken into account for the next synchronization of contacts.

To remove a contact from the Outlook synchronization, right-click on this contact from the search results, click on **Delete Outlook synchronization** then confirm.

#### Tip

To see the list of all the contacts to synchronize, click on **Edit > Search contacts synchronized with Outlook** from the contacts search screen.

#### Starting the synchronization of contacts

- 1 Click on **Tools > Synchronization > Synchronization of contacts**.
- 2 Confirm the synchronization.
  - ↳ The relevant contacts are synchronized with your Outlook contacts. This synchronization is a background process.