



Freelancer Communication

User Manual

The instructions in this manual are for informational purposes only and are subject to change. Protonic Software GmbH assumes no liability. The software described in this manual requires a license.

The individual functions are described using screenshots. Depending on your easyjob license, operating system or Office version, the functions and screenshots you have in your environment may differ from this manual or may only be available in later versions.

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INTRODUCTION

Information about the structure and content of this document can be found [here](#).



Important notice

This manual will help you get started with the easyjob 6 rental software Freelancer Communication Pack module.

The development of the easyjob rental software as well as the documentation has been done with great care. The individual program functions are constantly checked through our Quality Assurance Process. However, errors can still occur.

Main Office

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<http://www.protonic-software.com>

Support

You can find more information about the support options on-line at <http://www.protonic-software.com/en/easyjob/corporate/support/>.

In addition, there is a support forum where you can exchange information with other users. The support forum can be found at <http://forum.protonic-software.com>

Training

We offer customized training programs for the following extensive topics.

To learn more, please visit our website at

<http://www.protonic-software.com/en/service/training/> or contact our sales office at sales@protonic-software.com.

About this manual

The individual functions are described using screenshots of easyjob license 6. Depending on your easyjob license, the forms you have in your environment may differ from the screenshots shown in the manual.

How to use this manual

This document uses the following standards




Functions that require a license

Individual program functions are made available in your easyjob environment based on your license. This may concern individual program functions or entire modules.

Functions that are only available in individual modules are marked with minimum-edition symbols **S**, **M**, **L** or **XL**. Some functions are limited in easyjob S. There is no indication of this. You can find the limitations in the version comparison matrix on our website.

Functions that are only available by subscription are marked with the symbol .

For example:

| | |
|--|---|
| L | The function is only available in easyjob L and easyjob XL |
| L  | The function is only available in easyjob L and XL with a current subscription. |

easyjob-specific terms

In order to make a description better understood, in some cases easyjob-specific terms are **highlighted** with a color.

For example: with the **Project** and **Job** Groups, you also have the possibility to select a **Template**.

Work steps, buttons, actions and menu paths

Individual work steps, actions, menu paths or clicks are separated from each other or initiated by the symbol "↪•".

Buttons, menus, tabs, etc. used in context are **highlighted** in color.

Example 1: Check the box in the **Activating the List Editor** field.

Example 2: easyjob Menu ↪• **View** ↪• **Monthly Overview**

Example 3: ↪• **Help**

Example 4: ↪• **Ok**

Reference to other chapters

References to other chapters and sections are marked with a manual icon and displayed in color.

Example: See section  **Important information**.

Important information

Important information is highlighted in orange and presented with a light bulb.











Example:



This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important.

Special keys

Special keys are represented with the following symbols:

| Special key | Explanation |
|---|--|
|  | Windows key |
|  | Tabulator key |
|  | Arrow keys |
|  | Return key |
|  | Context Menu key |
|  | Escape key |
|  | Function key 1 |
|  + A | Control key. Keep the control key pressed down and press the A button. |
|  + H | Alt key. Keep the Alt key pressed down and also press the H button |
|  | Delete key |

Phrasing

In this manual and in the easyjob examples, terms such as employee, assistant, technician or carpenter are used both for men and for women.

Screenshot explanations

The screenshots will be explained using numbers ① ② ③ and arrows → marked.

Screenshot highlights will be marked with orange frames.

Invoices

From: 15/01/2017 To: 14/02/2017

Keyword:

Customer: All

Type: <All> Status: <All> Company: Standard

Reminder Status: Site: M

| Number | Name | Invoice Date | Total | Total incl. Tax | Name1 | Status | Paid | Terms of Payment | Open |
|---------------|------------------------------|--------------|------------|-----------------|---------------------|------------|--------------------------|--------------------------|------------|
| 13-0006 | Big Show | 27/04/2015 | €36,000.00 | €36,000.00 | Big Events Inc. | Open | <input type="checkbox"/> | Big Project Payment Plan | €36,000.00 |
| 13-0008 | Downtown Art Exhibition | 27/04/2015 | €16,650.00 | €17,899.50 | | Open | <input type="checkbox"/> | Big Project Payment Plan | €17,899.50 |
| 12-0007 | Big Opening Shopping Mall 1b | 14/04/2016 | €7,150.00 | €7,865.00 | | Open | <input type="checkbox"/> | Big Project Payment Plan | €7,865.00 |
| 12-0004 | Big Opening Shopping Mall 2 | 14/04/2016 | €7,150.00 | €7,865.00 | | Open | <input type="checkbox"/> | Big Project Payment Plan | €7,865.00 |
| 12-0006 | Big Opening Shopping Mall 1a | 14/04/2016 | €7,150.00 | €7,865.00 | | Open | <input type="checkbox"/> | Big Project Payment Plan | €7,865.00 |
| 12-0008 | Big Opening Shopping Mall 1c | 14/04/2016 | €6,300.00 | €7,049.00 | | Open | <input type="checkbox"/> | Remit within 30 days | €7,049.00 |
| 12-0001 | Repair | 29/03/2016 | €1,160.10 | €1,170.21 | | Open | <input type="checkbox"/> | Pre-paid by credit card | €1,170.21 |
| 02-0001 | Sample Project | 26/11/2012 | €492.00 | €492.00 | Max Sample Customer | Exported | <input type="checkbox"/> | Remit within 30 days | €492.00 |
| 10-0001 | | 21/04/2015 | €1.00 | €1.00 | | Open | <input type="checkbox"/> | Big Project Payment Plan | €1.00 |
| 13-0009 | | 27/04/2015 | €0.00 | €0.00 | | Open | <input type="checkbox"/> | Big Project Payment Plan | €0.00 |
| 13-0007 | CATS Revue | 27/04/2015 | €0.00 | €0.00 | | Open | <input type="checkbox"/> | Big Project Payment Plan | €0.00 |
| 13-0005 | Big Show | 27/04/2015 | €0.00 | €0.00 | | Open | <input type="checkbox"/> | Big Project Payment Plan | €0.00 |
| Totals | Quantity | 17 | Total | €82,053.10 | Total incl. Tax | €86,199.71 | | | |

Print Add Edit Close

Additional documentation

In order to make it easier to become acquainted with and consult the easyjob documentation, we have divided it into multiple sections.

You can find an overview of all documentation on the following website.

<http://www.protonic-software.com/en/service/downloads/>

FREELANCER COMMUNICATION

The Freelancer Communication Pack expands easyjob in order to communicate with contractors.

Freelancer Communication Pack ·

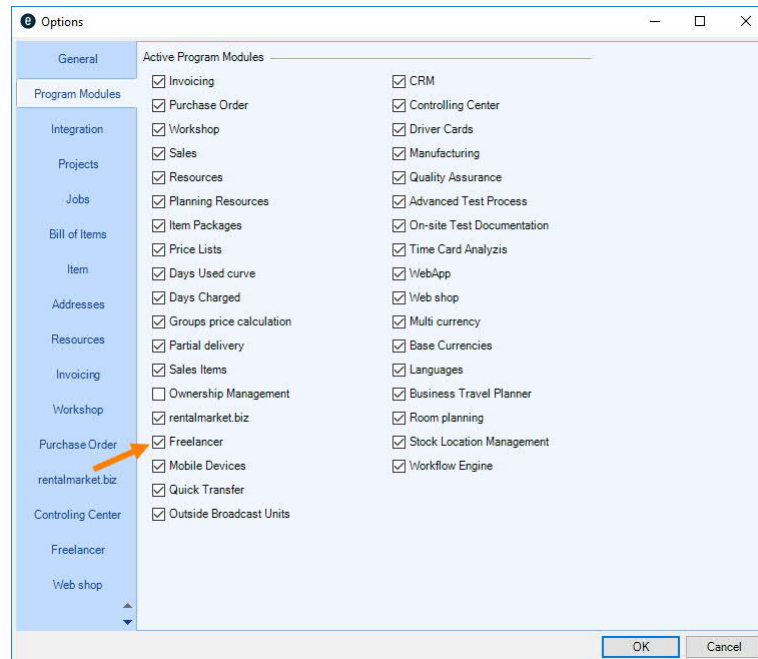
Communication with individual freelancers is made much easier with the easyjob Freelancer Communication Pack. You can view the published schedule of the freelancers directly in easyjob. Requests and confirmations are exchanged electronically and update the resource planner.

Installation and activation

Go to the easyjob program settings to activate the easyjob Freelancer Communication module.
A separate installation is not required.

Activating the Freelancer Communication module:

1. easyjob Menu ➡ • **Tools** ➡ • **Settings**
2. ➡ • **Program Modules** tab
3. Select **Freelancer**



4. ➡ • **Ok**

easyjob must be restarted to activate the settings.

Configuration and settings

Communication takes place via e-mail. We recommend using a dedicated e-mail account for this, e.g. freelancer@mycompany.de.

There are two communication possibilities:

E-mail scheduling interface

The scheduling interface creates a scheduling request e-mail according to the standardized protocol RFC 2445. The scheduling request can be processed using most e-mail programs. After the freelancer confirms or cancels the appointment, the message is sent back and updated in the resource request status.

easyjob resource interface

With the easyjob resource interface, an e-mail is generated with a file attachment. The file contains important information regarding further electronic processing.

The protocol has been expanded from easyjob 5 to allow data exchange with temporary employment agencies as well as with other easyjob companies.

License

Each freelancer requires a communication license. After it has been assigned, the license is associated with the address and cannot be assigned to another freelancer.

System requirements

In order to send e-mails, an e-mail server must be available that supports sending e-mails via SMTP and receiving them via IMAP. It may be necessary to configure the e-mail server and the firewall.

easyjob can receive and send the messages. An e-mail program is not required.

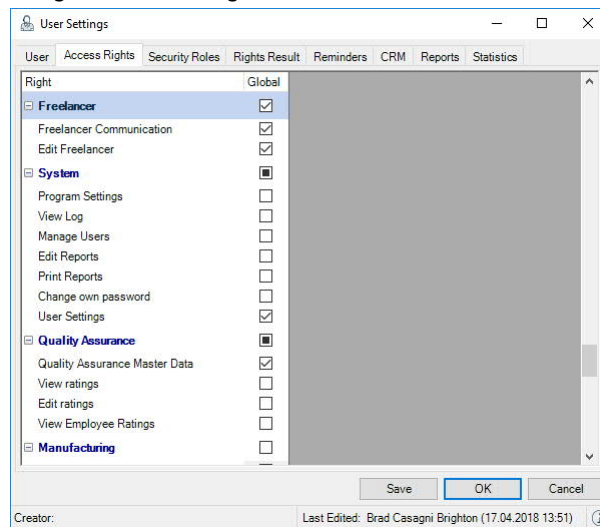
easyjob sends the e-mails directly to the workstation computers.

User settings

The rights for carrying out Freelancer Communication and to edit Freelancer data are defined in the user settings.

Assigning the user rights for Master Data:

1. easyjob Menu ➞ Tools ➞ Manage Users
2. ➞ Select a User
3. ➞ Edit
4. ➞ Access Rights tab
5. ➞ Freelancer
6. Assign the desired rights



7. ➞ Save
8. ➞ Ok

Assigning licenses

Each freelancer or temporary employment agency with which you want to communicate requires a license. The license can be assigned in the easyjob program settings or in the resource master data.

Assigning a license to a freelancer:

1. easyjob Menu ➞ [Master Data](#) ➞ [Addresses](#)
2. Select an address
3. ➞ [Resource](#) tab
4. Enter the e-mail address for communication.
5. ➞ [Assign](#) license

It is also possible in the program settings to view the licenses that have already been assigned and you will receive a recommendation list indicating the people for whom a license is recommended.

| Type | Number | Own Number | Name | Assignments | Last Assignment | License |
|------------|------------|------------|-------------------|-------------|-----------------|---------------------------|
| Freelancer | 1000217.00 | | Dan DOLLINGER | 15 | 12.09.2018 | (missing text) |
| Freelancer | 1000002.00 | 5abc | Patrick Patel | 12 | 25.02.2017 | (missing text) 01/01/2050 |
| Freelancer | 1000273.00 | | Susan Loki Fisher | 8 | 04.09.2018 | (missing text) 01/01/2050 |
| Freelancer | 1000321.00 | | Fredrik Godwin | 6 | 14.09.2017 | (missing text) 01/01/2050 |
| Freelancer | 1000251.00 | | David Eshel | 6 | 04.09.2018 | (missing text) 01/01/2050 |
| Freelancer | 1000179.00 | | Carol Crane | 5 | 04.09.2018 | (missing text) |
| Freelancer | 1000223.00 | | Dan Driggs | 5 | 14.09.2017 | (missing text) 01/01/2050 |
| Freelancer | 1000008.00 | | Hank Miller | 4 | 04.09.2018 | (missing text) 01/01/2050 |
| Freelancer | 1000012.00 | | My Fal Technik | 2 | 18.04.2015 | (missing text) 01/01/2050 |
| Freelancer | 1000007.00 | | John Smith | 2 | 21.04.2015 | (missing text) 01/01/2050 |
| Freelancer | 1000141.00 | | Bill Burridge | 2 | 11.09.2017 | (missing text) 01/01/2050 |
| Freelancer | 1000156.00 | | Brad Casagni | 1 | 03.09.2018 | (missing text) |
| Freelancer | 1000060.00 | | Alan Andersen | 1 | 04.09.2018 | (missing text) |
| Freelancer | 1000006.00 | 0 | Larry Lopez | 1 | 15.04.2015 | (missing text) 01/01/2050 |
| Freelancer | 1000305.00 | | Exeter Gent | 1 | 14.09.2017 | (missing text) 01/01/2050 |
| Employee | 1000308.00 | | Finn George | 1 | 03.09.2018 | (missing text) |
| Employee | 1001027.00 | | Milan Slava Prag | 0 | | (missing text) |
| Freelancer | 1000058.00 | | Akim Alvarez | 0 | | (missing text) |

We recommend 0 new licenses. [Shopping Cart](#)

| Quantity | AvailableLicenses |
|----------|-------------------|
| 101 | 90 |

[Finish](#)

Open license management

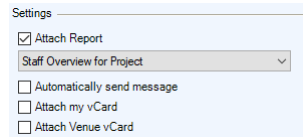
1. easyjob Menu ➞ [Tools](#) ➞ [Settings](#)
2. ➞ [Freelancer](#) tab
3. In the Licenses category ➞ [Manage](#)

Communication settings

In order to optimize the request, you can pre-fill the e-mail text to the freelancers and add automatic report files as file attachments.

In addition, you can add your own address as well as the event address in vCard format to each message.

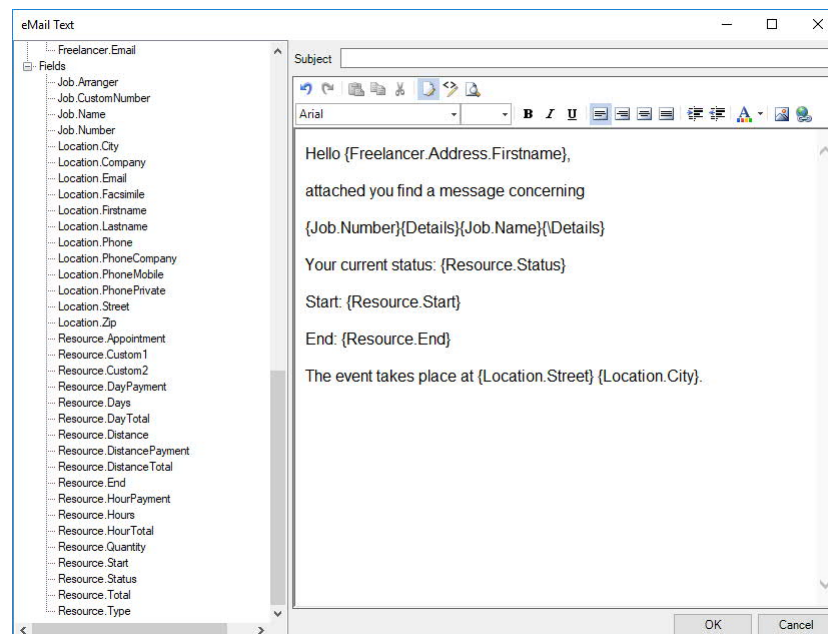
With the setting **Send messages automatically** the e-mail is directly sent after changing the status of the resource assignment. If this function is not active, it can be sent manually in the **Communication Center**.



Pre-filling message texts in e-mails

1. easyjob Menu ➤ **Tools** ➤ **Settings**
2. ➤ **Freelancer** tab
3. In the e-mail text category, select Text or HTML format
4. ➤ **Edit**

To better personalize the message, you can use variables in the text.



E-mail-settings

The e-mail settings depend on your e-mail server. In the case of internal e-mail servers such as Microsoft Exchange, it may be necessary to configure the SMTP connectors.

The screenshot displays the 'E-Mail Settings' configuration window within the easyjob software. The window is titled 'E-Mail Settings' and contains the following fields and options:

- E-Mail Client:** A dropdown menu set to 'easyjob'.
- E-Mail Address:** A text field containing 'freelancer@mycompany.com'.
- User Name:** A text field containing 'freelancer@mycompany.com'.
- Password:** A text field with masked characters '*****'.
- Automatic reception:** A checked checkbox with a value of '5' and the unit 'Minutes'.
- Mailserver Timeout:** A text field with a value of '0' and the unit 'Seconds'.
- Download restriction:** An unchecked checkbox with a value of '0' and the unit 'Days'.
- IMAP:** A text field containing 'smtp@mycompany.com'.
- SMTP:** A text field containing 'smtp@mycompany.com'.
- Test account settings:** A section with a 'Start' button and a status message: 'Test successful E-Mail transfer time 0.03 minutes'.

The background shows the main software interface with a sidebar menu on the left containing options like 'General', 'Program Modules', 'Integration', 'Projects', 'Jobs', 'Bill of Items', 'Item', 'Addresses', 'Resources', 'Invoicing', 'Workshop', 'Purchase Order', 'rentalmarket.biz', 'Controlling Center', 'Freelancer', 'Web shop', 'Mobile Scanner', 'WebApp', 'Quality Assurance', 'Manufacturing', 'CRM', 'Time Card', 'Languages', 'Room planning', and 'Travel planner'. The 'Freelancer' tab is selected in the sidebar.

easyjob can send e-mails from a central e-mail account via SMTP/IMAP or use a locally installed Outlook program as the e-mail client. We recommend sending e-mails directly from easyjob. To do this, select the **easyjob** e-mail client.

When testing e-mail connectivity, a test e-mail is sent via SMTP and retrieved via IMAP. Your selected settings are correct if the test is completed correctly.

Configuring e-mail settings

1. easyjob Menu ➞ **Tools** ➞ **Settings**
2. ➞ **Freelancer** tab
3. Modify the settings
4. ➞ **Start** to test the settings

Master Data

The communication settings for the freelancers are configured in the address master data. You can set a different e-mail address for communication. If you insert no e-mail address, the address from the Main Data will be used automatically when you assign the license.

1000141.00 Bill Burrige

Main Data Contacts Activities Advanced Address Types Communication Invoicing Jobs Sales Trends Item Resource Custom Fields

Attachments DigiFleet Time Card Time Recording Ratings rentalmarket.biz Skills Blocking Indicator Purchase Invoices CRM

Addresses can be categorized under multiple Address Types.

Resource Information

Resource Type: Freelancer

Always display in Resource Plan: ☐

Ignore availability check: ☐

Employee Assignment valid to: 25.05.2020

Permit acceptance/cancellation via Web: ☒

Freelancer

E-Mail Address: bb@abc.com

Driver Card Number:

License: valid Release

Communication type: E-Mail appointment interface

Delete Save OK Cancel

Creator: sys admin (19.01.2013 16:22) Last Edited: Brad Casagni (25.05.2020 13:42)

In order to communicate with a freelancer, you must assign a license.

Activating resources for communication

1. easyjob Menu ↔ Master Data ↔ Addresses
2. Select an address
3. ↔ Resource tab

1000141.00 Bill Burrige

Main Data Contacts Activities Advanced Address Types Communication Invoicing Jobs Sales Trends Item Resource Custom Fields

Attachments DigiFleet Time Card Time Recording Ratings rentalmarket.biz Skills Blocking Indicator Purchase Invoices CRM

Manage Resource information here.

Resource Information

Resource Type: Freelancer ①

Always display in Resource Plan: ☐

Ignore availability check: ☐

Employee Assignment valid to: 25.05.2020

Permit acceptance/cancellation via Web: ☒

Freelancer

E-Mail Address: bb@abc.com

Driver Card Number:

License: None Assign ②

Communication type: E-Mail appointment interface ③

Delete Save OK Cancel

Creator: sys admin (19.01.2013 16:22) Last Edited: Brad Casagni (25.05.2020 13:42)

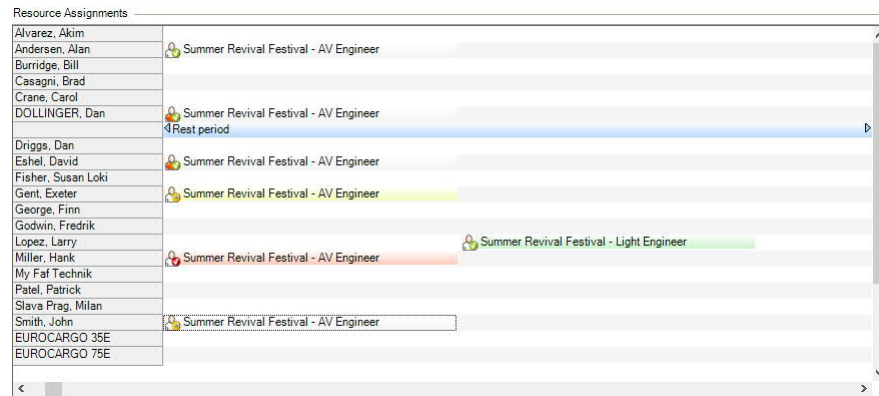
4. Assign the Resource Type Freelancer ①
5. ↔ Assign license ②
6. For freelancers, set the type of communication ↔ E-Mail appointment interface ③

When you work together with a temporary employment agency, which provides an **easyjob resource interface** you can alternatively select this communication type.

Communication status







In addition to the resource status, also the communication status is recorded for freelancers. This can be used, for example, to see if a request was already sent but has not yet been answered.





The communication status is displayed in the assignment in the resource plan and depends on the resource status.



The following table shows the possible status types.

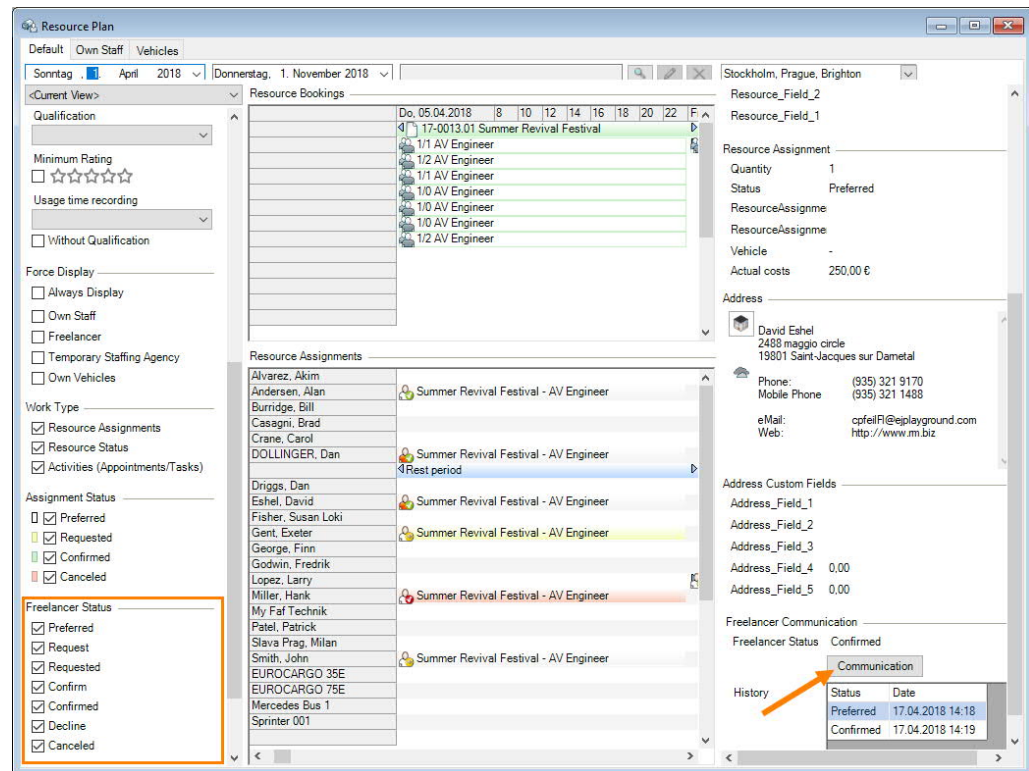
In the case of a standard e-mail scheduling request, not all status types are technically possible.

| Name and Icon | E-mail scheduling interface | easyjob resource interface | Description |
|--|-----------------------------|----------------------------|--|
| Tentative | X | X | The person is tentative |
|  Request | X | X | The person should be requested |
|  Requested | X | X | The request was sent |
|  Confirm | | X | The freelancer has confirmed, the reconfirmation has not been sent |
|  Confirmed | | X | The reconfirmation has been sent |
|  Cancel | X | X | The cancellation must still be sent |
|  Canceled | X | X | The cancellation has been sent |

| Name and Icon | E-mail scheduling interface | easyjob resource interface | Description |
|---|-----------------------------|----------------------------|--|
|  Freelancer confirmation | X | X | The person has confirmed |
|  Freelancer cancellation | X | X | The person has canceled |
|  Move the time frame Update sent | X | X | It is possible to move the time frame using the easyjob resource interface. The Internet scheduling standard does not support this method. In this case, the system will send a cancellation message for the old appointment and generate a new request message for the new appointment. |
|  Move the time frame Update not yet sent | X | X | The appointment was moved and the update must still be sent. |

Controlling and monitoring the flow of messages

Various filters are available in the resource plan for monitoring and control based on the current communication status.

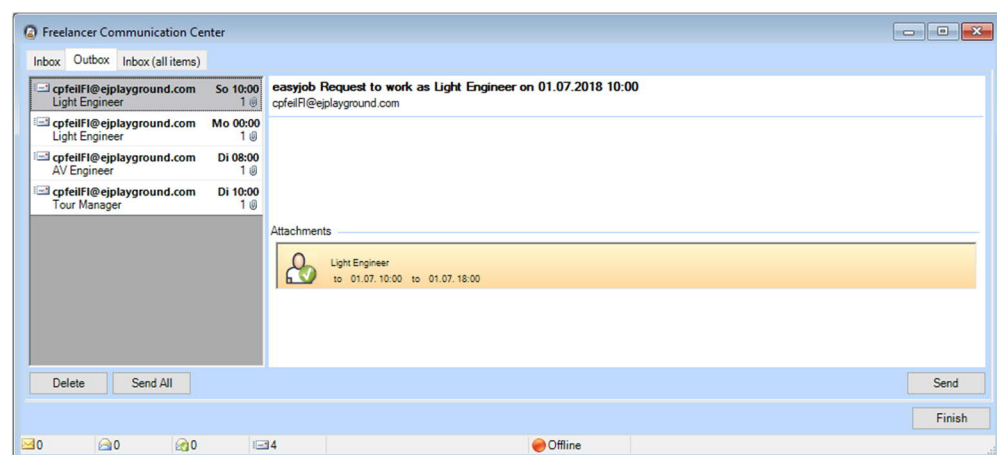


If there are any messages that still must be sent, they can be sent using the **Communication** function from the resource plan.

With the Freelancer Communication Center you can see the responses from your resources as well as view and also edit the messages still to be sent.

The **In-box** shows all possible answer messages for automatic processing for the e-mail account. You can view all the messages in the **In-box (complete)**.

The messages still to be sent can be seen in the In-box.



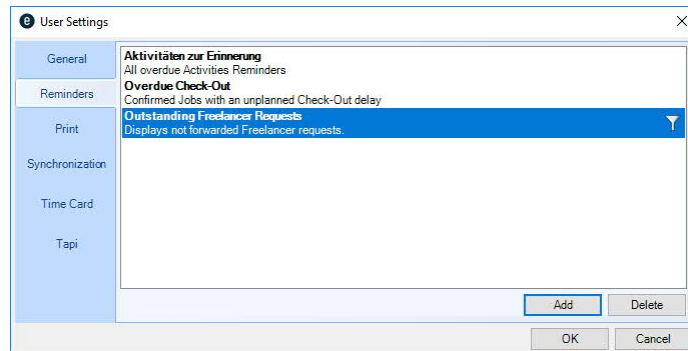
Processing incoming resource messages

1. easyjob menu ➞ • [View](#) ➞ • [Freelancer Communication Center](#)
2. Select a message
3. ➞ • [Edit](#)

To avoid having to manually search for possible messages in the Freelancer Communication Center, you can set a reminder for incoming and outgoing messages.

Setting a reminder for incoming and outgoing messages

1. easyjob Menu ➞ • [Tools](#) ➞ • [User Settings](#)
2. ➞ • [Reminder](#) tab



3. Set the desired reminder for incoming and outgoing messages

Messages

Messages are sent and processed via a Wizard. With the Wizard, in addition to processing the message also the current Freelancer status is set. The Freelancer status can be changed manually at any time in the resource plan.

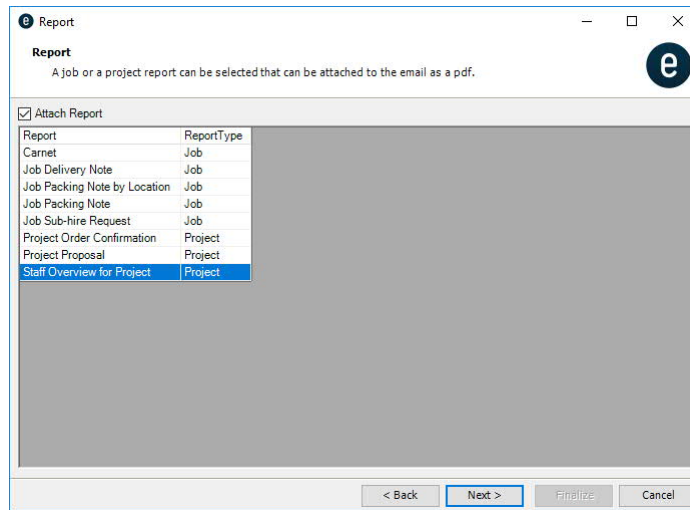
Request message

You can process multiple resources at the same time. To do so, select the checkbox in order to process all assignments ②. The details about the request can be viewed in the tabs ③. If you want to add the resource address information in vCard format to the request, select the respective address.

View the current status and set the new status. The new status is preset and should not be changed under normal circumstances.

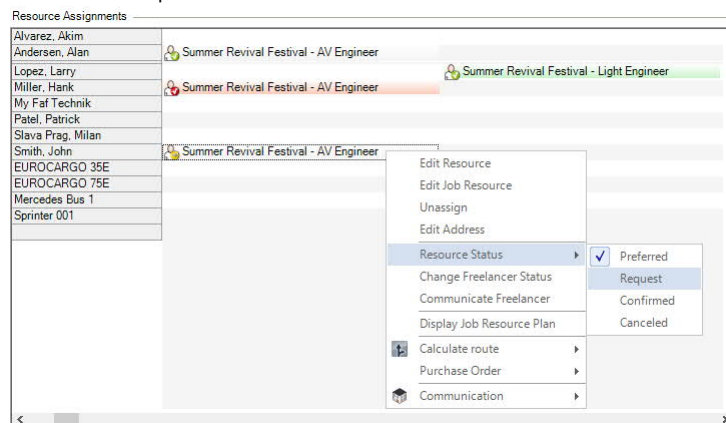
The message text can be predefined in the master data and customized for every request.

In order to provide the resource with more information about the project, you can add a project related report as a PDF attachment.

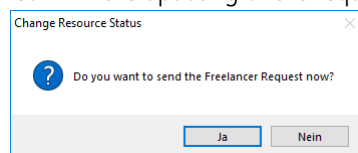


Requesting a resource

1. Select the Request status



2. Confirm the updating of the request status

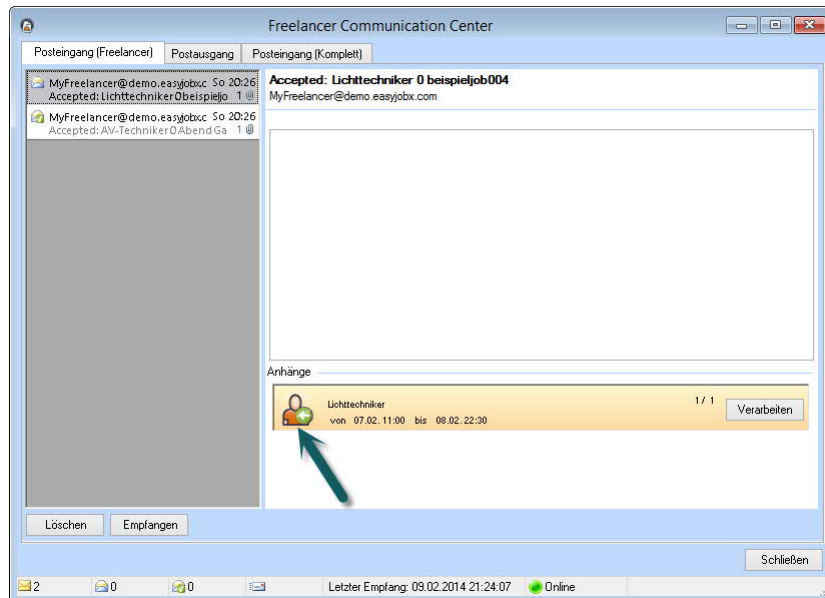


3. Follow the steps in the Wizard and finish with [Finalize](#).

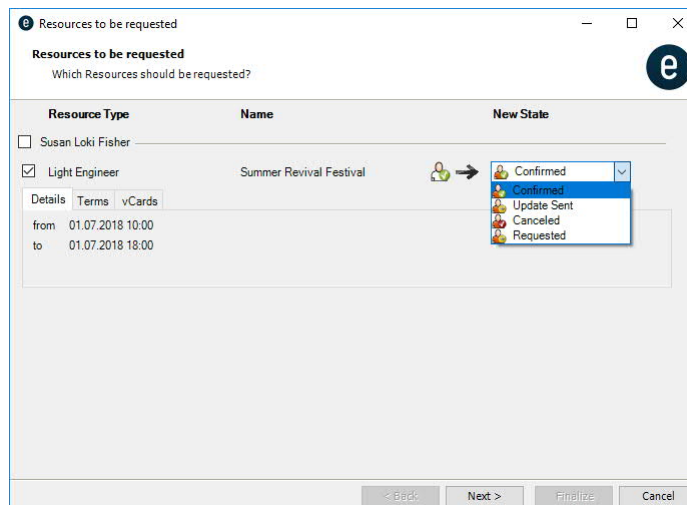
Incoming message

Incoming messages are displayed in the Freelancer Communication Center.

Next to the e-mail text, you can see the status confirmed by the freelancer in the preview (acceptance or cancellation).



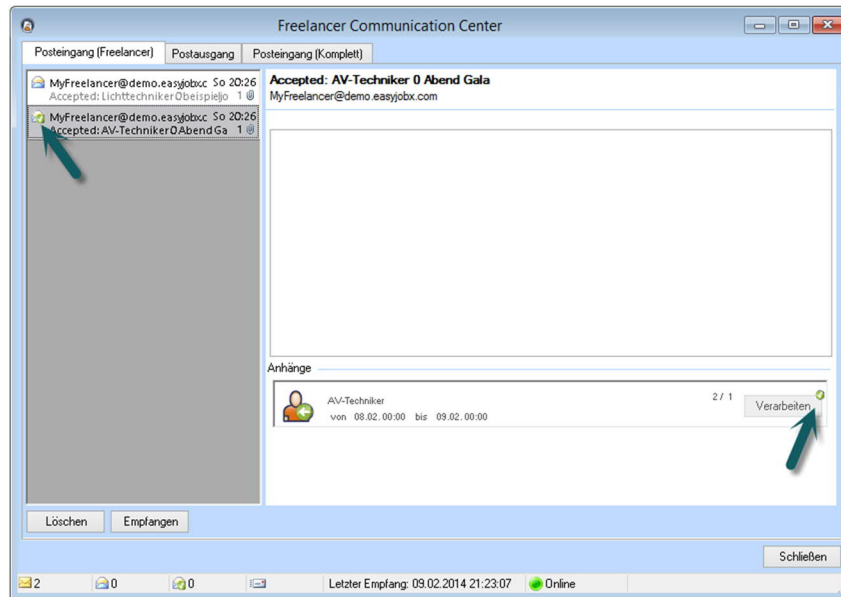
You can use the message processing Wizard to manually change the new status.



You can see in the Resource Plan tab if the assignment changes and if there is still a shortfall.



Processed messages are indicated in the in-box with a green checkmark on the e-mail symbol as well as on the **Processed** button.



Processing an incoming message

1. easyjob menu ➡ • [View](#) ➡ • [Freelancer Communication Center](#)
2. Select a message
3. ➡ • [Process](#)
4. Follow the Wizard's instructions