Freelancer Communication

User Manual

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Freelancer Communication Pack - Table of contents

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.

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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. This information is important.

Special keys

Special keys are represented with the following symbols:

Special key	Explanation
	Windows key
Tab	Tabulator key
↓ ← → ↑	Arrow keys
	Return key
	Context Menu key
Esc	Escape key
F1	Function key 1
Ctrl + A	Control key. Keep the control key pressed down and press the A button.
Alt + H	Alt key. Keep the Alt key pressed down and also press the H button
Del	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.

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.

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
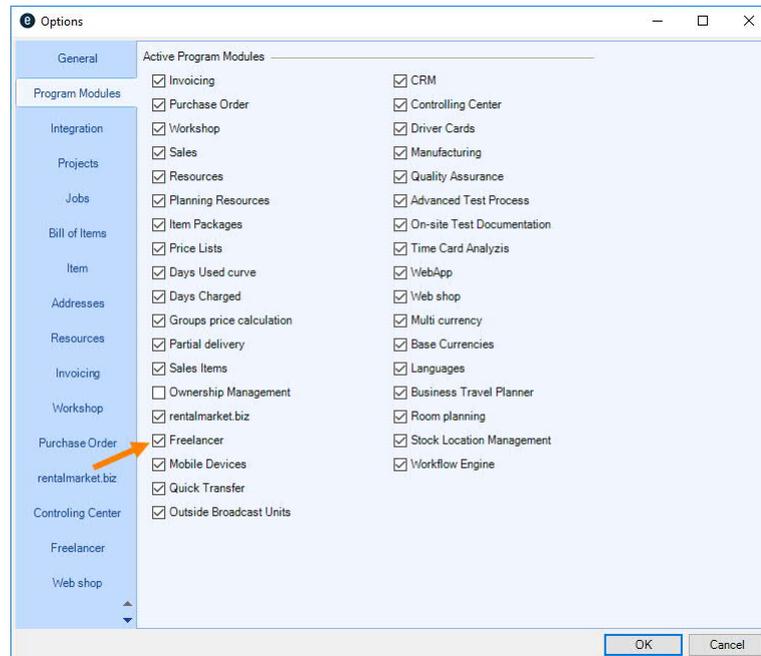
4. ⤷• Ok

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
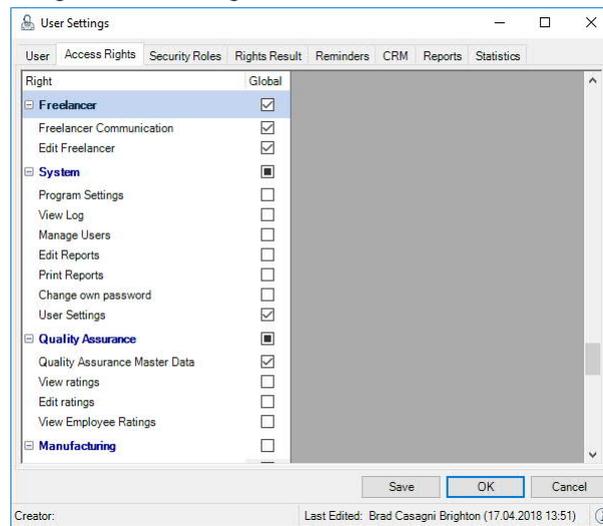
7. ↪• Save
8. ↪• Ok

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 Faf 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

Freelancer License Center — ○ All Staff ○ Without licenses ○ Recommended Licenses ○ Active Licenses — 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.
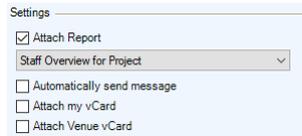
Pre-filling message texts in e-mails

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.
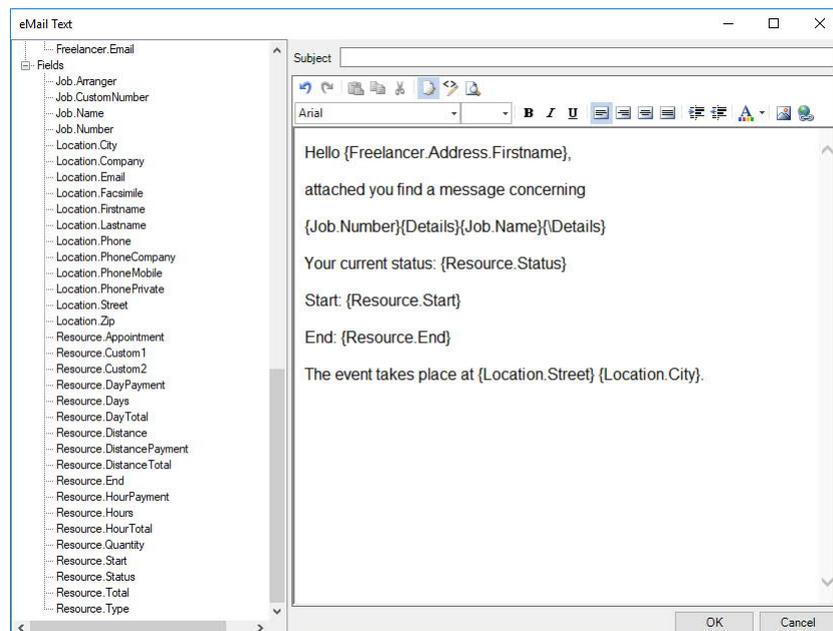
E-mail-settings

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.

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.

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

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.
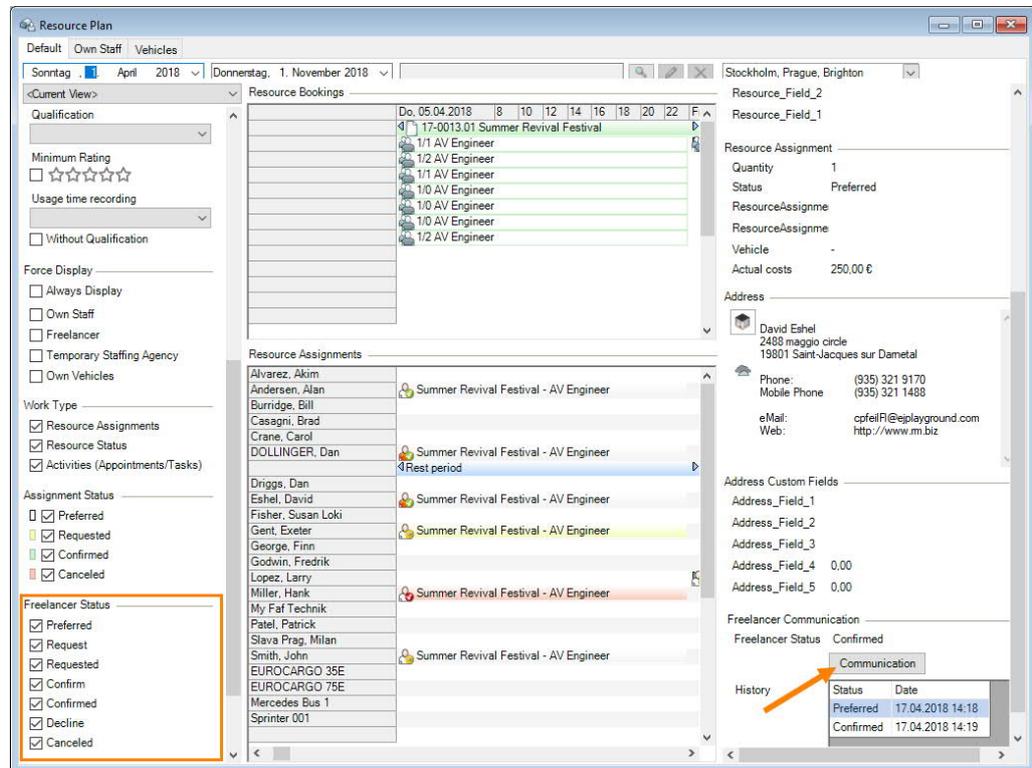

If there are any messages that still must be sent, they can be sent using the Communication function from the resource plan.

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.
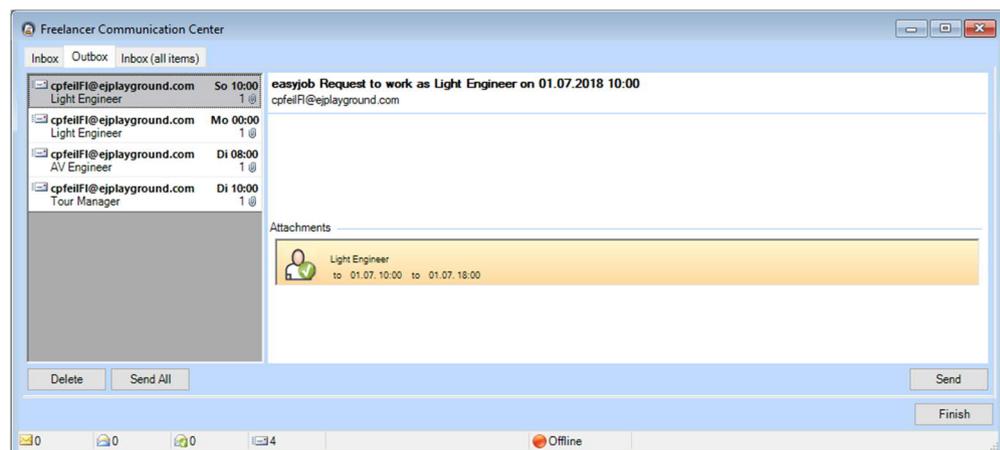
Processing incoming resource messages

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
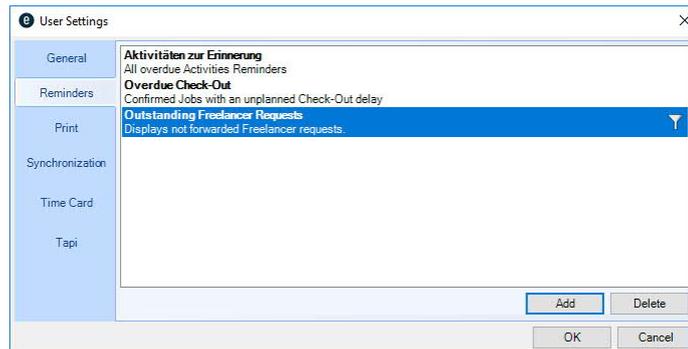
3. Set the desired reminder for incoming and outgoing messages

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
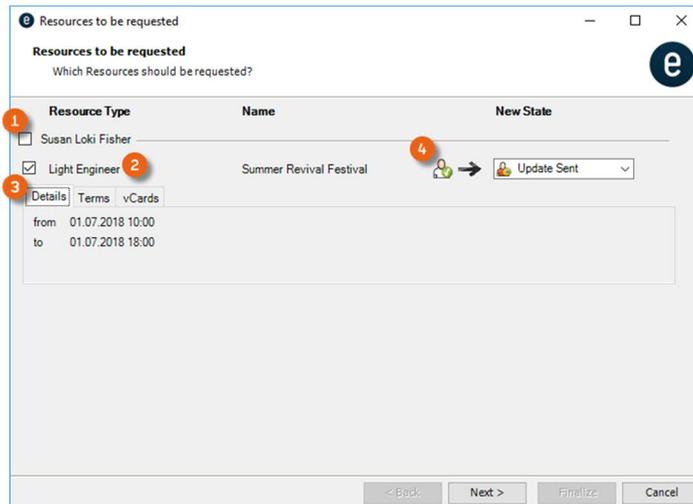
You can process multiple resources at the same time. To do so, select the checkbox in order to process all assignments ②. The details about the request can be viewed in the tabs ③. If you want to add the resource address information in vCard format to the request, select the respective address.
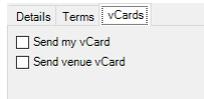
View the current status and set the new status. The new status is preset and should not be changed under normal circumstances.

The message text can be predefined in the master data and customized for every request.
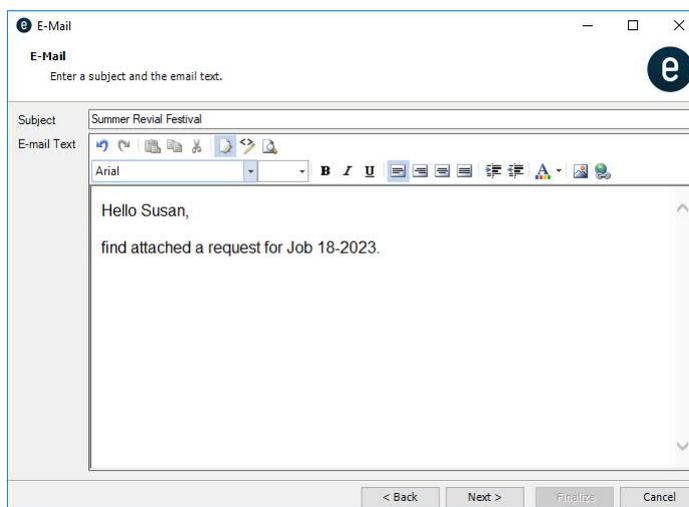
In order to provide the resource with more information about the project, you can add a project related report as a PDF attachment.
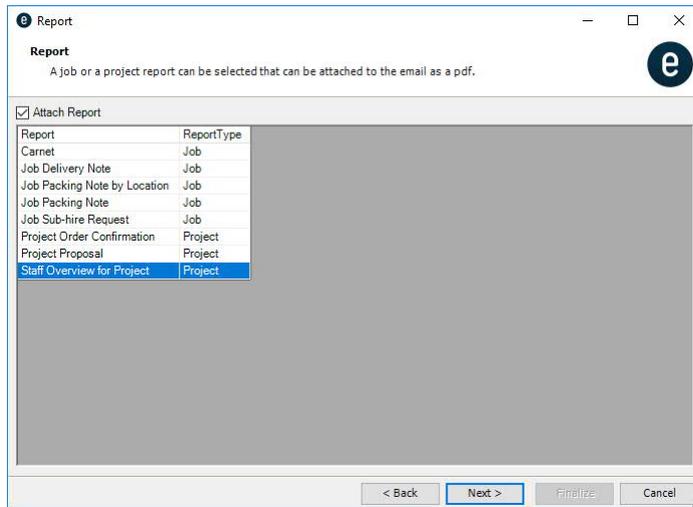

Requesting a resource

1. Select the Request status
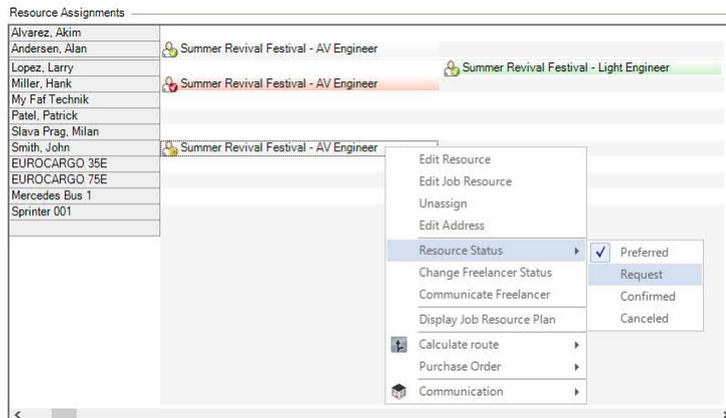
2. Confirm the updating of the request status
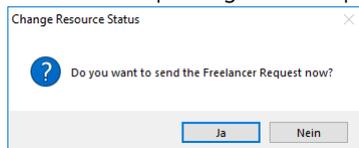
3. Follow the steps in the Wizard and finish with Finalize.

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).
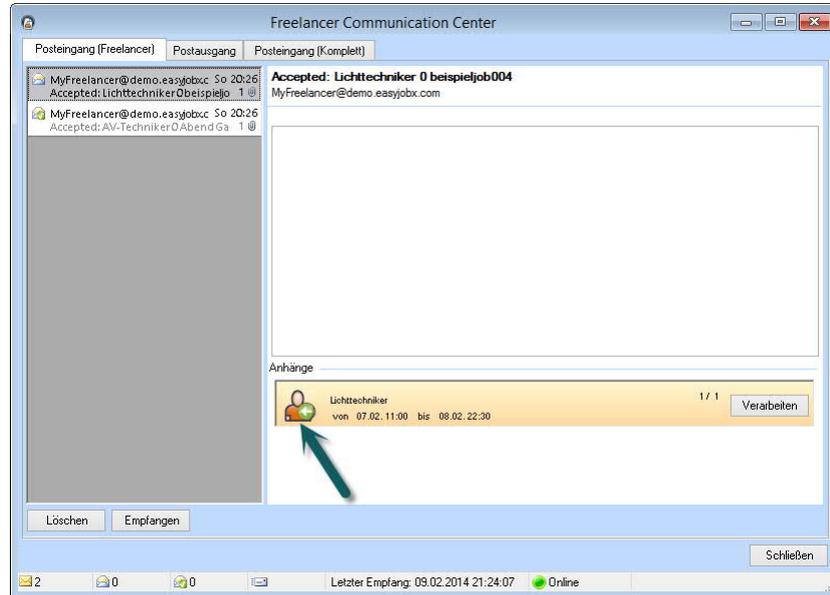

You can use the message processing Wizard to manually change the new status.
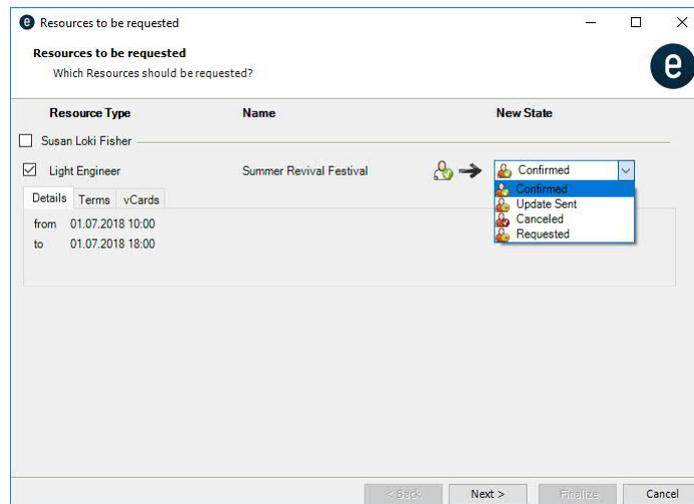
You can see in the Resource Plan tab if the assignment changes and if there is still a shortfall.

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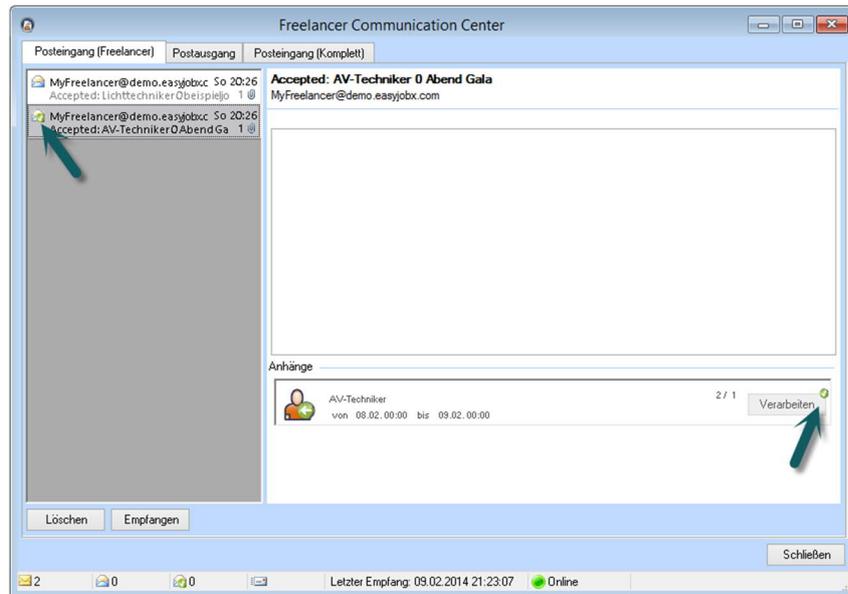
Processing an incoming message

1. easyjob menu ↪• View ↪• Freelancer Communication Center
2. Select a message
3. ↪• Process
4. Follow the Wizard's instructions