

New features

- Favourite Client > Great Project

Great Project

Project

Status: **Initial**

Ref. id: FavClie-GP

Estimates on this/master pr...

EST0001

Other approved estimate:

Add budget to this project: + Add budget to project

Item No.	Name	Unit price	Units total	Remaining	10/18/2012
	▼ Monthly	0 EUR	1	0.5	0.5
	Product Sales	1000 EUR	1	0.5	0.5
	▼ One off	0 EUR	1	0.5	0.5
	Product Sales	1000 EUR	1	0.5	0.5
	Services	100 EUR	1	0.5	0.5
	Chargeable time	30 EUR	10	5	5
	Chargeable expense	0 EUR	0	0	0

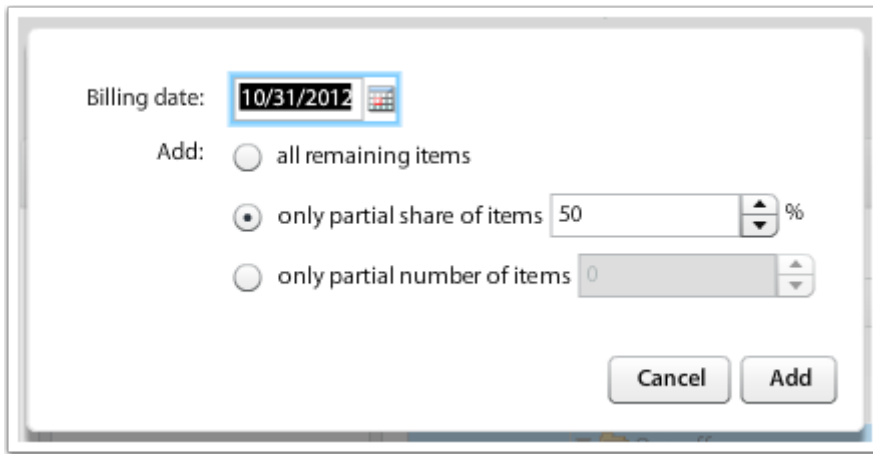
From estimate: EST0001

Master Project: Favourite Client > Great Project

Budget Project: Great Project

Estimate Total value: 2400 EUR

- Budgeting: possibility to use only part of Estimate



Billing date: 10/31/2012

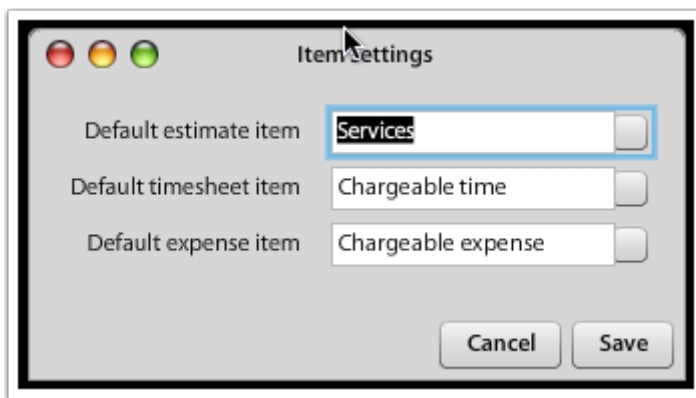
Add: ☐ all remaining items

☒ only partial share of items 50 %

☐ only partial number of items 0

Cancel Add

- Estimates: possibility to create & use templates
- Invoices: possibility to create & use templates
- Products: new tool for creating Product price lists
- Products: added option to build "Product Package" - set of related Products to be set in bundles
- Options & Tools > Item Settings: added option to set-up default Estimate item: required in combination with new tools for building project budget from Estimate, used for items that should be converted to budget but were not bound to any Product in Estimate (free-form record was used instead)



Item Settings

Default estimate item: Services

Default timesheet item: Chargeable time

Default expense item: Chargeable expense

Cancel Save

Enhancements

- Estimate: adding multiple Products (incl. Product Bundles in tree structure) into the Estimate
- Contacts & Projects: added indication of progress on listing
- Reports: added option to open Activity from report results
- Contacts: possibility to select multiple contacts & send them e-mail on right click
- Recruitment Vacancies: added button to create New Vacancy using project wizard

- Recruitment Vacancies: indication of listing Vacancies
- Advanced Time Sheet: several improvements
- Finance / Invoice: changed default sorting of records so that the newest are on top
- Items: renamed to Products
- Billing: now it's possible to build Billing Details in tree hierarchical structure
- Billing: the billing item now has "Name" attribute, allowing it to keep the record from Estimate
- Invoice/Estimates: added column indicating Job Number (project Ref. ID)
- Project: improved new project wizard, especially when used in connection to Atollon.com request tracking

Bug fixes

- Advanced time sheet - fixed behavior of Cancel button
- Calendar: fixed colors of events (per type of event)
- Messaging: fixed opening e-mails with long list of recipients (thousands of records)

Request tracking changes

- fresh new redesigned version of the whole extranet
- ensured compatibility among browsers (Firefox, Chrome, Internet Explorer)
- redesigned HTML e-mail template to be compatible with MS Outlook

Revision #1

Created 25 March 2020 17:32:06 by Jan Safka

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