

Atollon 2013 Innovations

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Atollon Innovations 2013

(week 52)

New features

- Billing & Invoicing: client billing is fully automated, based on new set of Billing Rules
- Billing & Invoicing: you can set-up General (system-wide) & custom (client-side) Billing Rules

Billing Settings

Create new invoice for each:

Templ...	Billing period	Products	Types of Projects	Types of Activities
1	Monthly	<any>	Partnership, Project, Sales ...	<any>
2	Monthly	<any>	Campaign member	<any>
3	Monthly	<any>	Other	<any>

Invoice Template | **Time Sheet Billing Rules**

Provider: Best Provider

Payment Method: Bank Transfer

Bank Account: 9845734857/5500

Const Symbol: Services

Client:

Deliver To:

Contact E-mails:

Journal: Issued Invoice

Currency: EUR

Days Due: 14

Summary: Please find attached our invoice for professional services

Header: This is invoice for our project services

Footer: Thank you for cooperation

Print Template: Invoice_Multi_cz_upgraded.html

Time Sheet Print Template:

Close Save and Close

- Billing & Invoicing: auto-creation of Draft Invoices for approval

Perfectia, SE
Client

Status: Potential
Ref. id:

New Edit Use Template Prepare Draft Invoice

	Number	Taxation Date	Due Date	Provider	Client	Project	Total Amount	To be paid
All 72,993.00 EUR		12/31/2013	01/14/2014	Best Provider	Perfectia, SE	Project	493.00 EUR	493.00 EUR
For Approval 493.00 EUR	INV130003	12/18/2013	01/01/2014	Your Organization	Perfectia, SE	Project	72,500.00 EUR	72,500.00 EUR
This Month 72,993.00 EUR								
Previous Month 0.00 EUR								
Overdue 0.00 EUR								
Invoice States:								
All states								
Drafts								
Issued								
Paid								
Partially paid								
Disapproval								
Demanded								
Cancelled								

Delete Approve Draft

Enhancements

- Messaging: auto-populate context field when searching (good for keyboard enthusiasts)
- Project: added support for immediate visibility of Activity numbering (in Finder, context, Tasks, Projects, etc.)
- Recruitment: possibility to mass-mail Applicants from search results

Bug fixes

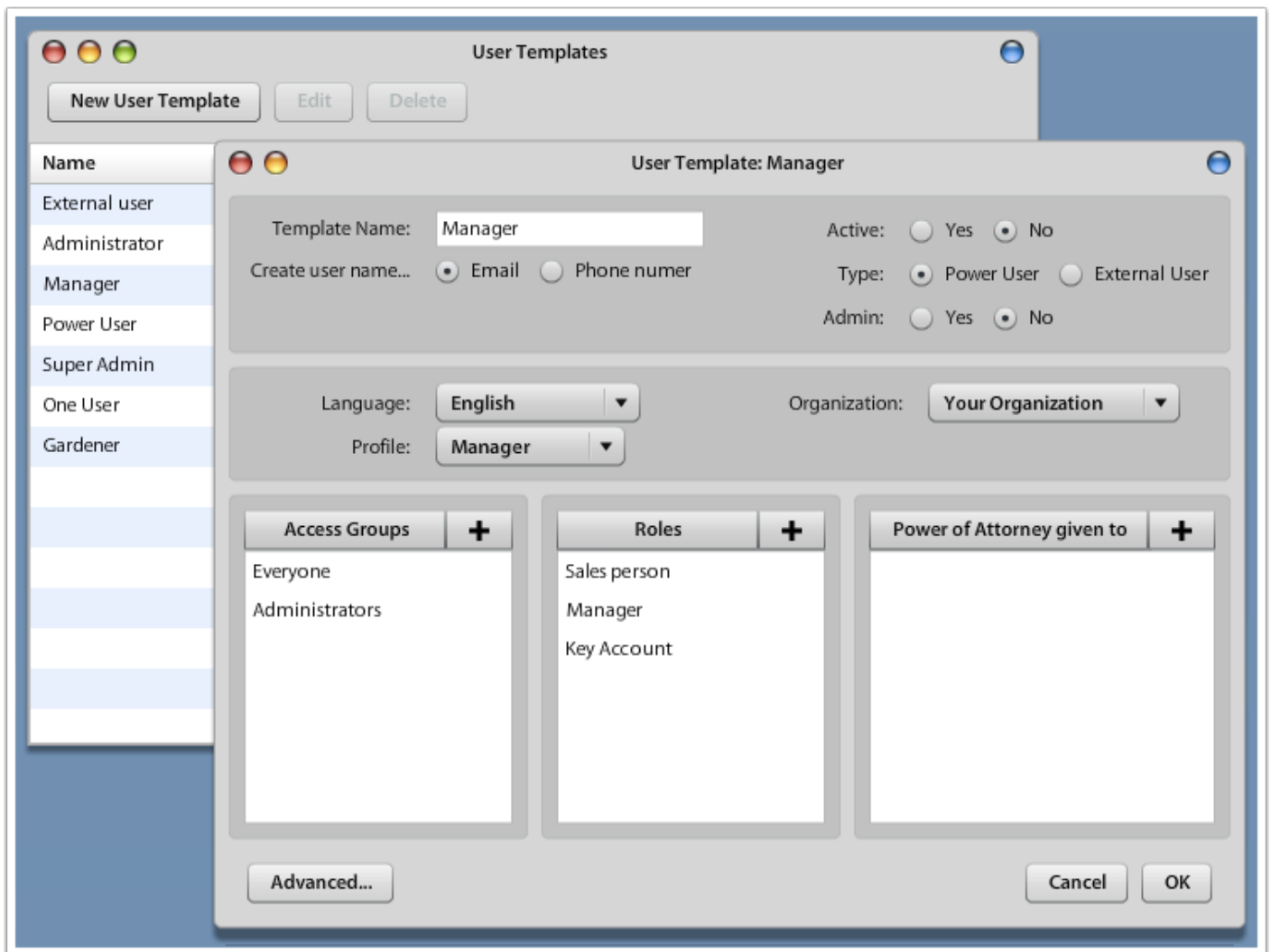
- Contact: fixed large drag & drop contacts to contact groups
- Contact: several bug fixes in saving (new) contact form

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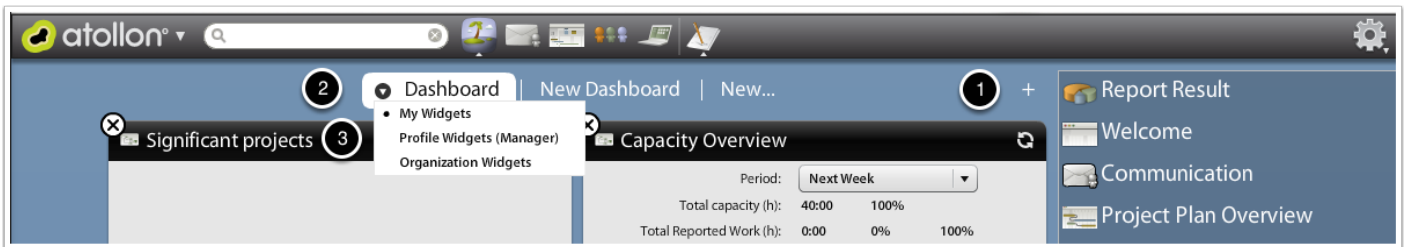
(week 50)

New features

- Access: **User templates** supported



- Access: Possibility to share Folders / Clients among multiple organizations
- Contact: auto-lookup for companies based on public registry (CZ + SK supported)
- Contact: loading bank codes
- Contact: supported indefinite number of e-mails, phones, etc.
- Dashboard: customization for User Profile supported



- Estimate: supported Tracking Categories in Estimates & transactions
- Estimate: discounts supported & improved multi-transaction discounting

Name	Unit Price	Qty.	VAT	Amount	incl. Tax
▼ Mileston 1: Analysis	0.00 EUR	0		0.00 EUR	0.00 EUR
Services	80.00 EUR	20	20%	1,600.00 EUR	1,920.00 EUR
▼ Milestone 2: Development	0.00 EUR	0		0.00 EUR	0.00 EUR
Product Sales	80.00 EUR	45	20%	3,600.00 EUR	4,320.00 EUR

- Finder: possibility to add one user to several roles (Folder, Project, Activity)
- Time Sheet: supported Team Controlling / Tracking Categories by User or Context (Folder, Project, Activity)
- Time Sheet: calendar events are automatically tracked in Time Sheet
- Work Contract: possibility to assign Tracking Category to user(s)

Enhancements

- Access: Easier way of creating new User
- Contact: Contacts module rewritten to new framework

Create contact: John Smith

Name

Prefix:

First Name:

Last Name:

Middle Name:

Suffix:

Contact Folders

Addresses

Corre... Deliv... Empl... Invoi... Regis... Temp...

Street:

Zip:

City:

Region:

Country:

Contact information

☒ E-mail

☒ Mobile

☒ LinkedIn

Base Info

Employments

☒ Favourite Client

Persons

Mass Mail Subscription

☐ Allowed ☐ Forbidden ☐ Unknown

Distribution groups

☒ VIP Clients

Comment

- Contact: easier creating new relations
- Contact: auto-completion of address components from the database (based on ZIP code)
- Contact: improved layout of address fields
- Contact: improved layout of contact information
- Contact: improved adding contact to group(s)
- Contact: improved assigning Industries to company contacts
- Finder: fixed focus on Finder component when moving message
- General: added progress indication when loading data
- General: brand new SOAP server (improved for server memory consumption & validity of all soap requests)
- General: all system configuration functions supported in SOAP (enables scripting installations)
- General: developed instance manager for instance auto-configurations
- General: all functions support SystemID for easy remote configurations
- General: added secure multi-organization set-up
- Message: possibility to switch horizontal / vertical preview
- Recruitment: fixed opening Vacancy on double-click
- Recruitment: several Selection Procedure details improvements
- Recruitment: fixed creating new Applicant folder (accidental creating folder twice)
- Recruitment: improved performance of Vacancy listing
- Recruitment: improved performance of Applicant listing / detail

- Recruitment: more robust search, cancelling queries
- Report: possibility to cancel query execution
- Report: opening report results from Dashboard component
- Report: fixed user selection dialog
- Time Sheet: added Folder, Project, Activity as separate columns (for easier export data manipulation)
- Workflow: fixed several actions, incl. creating New Tasks

Bug fixes

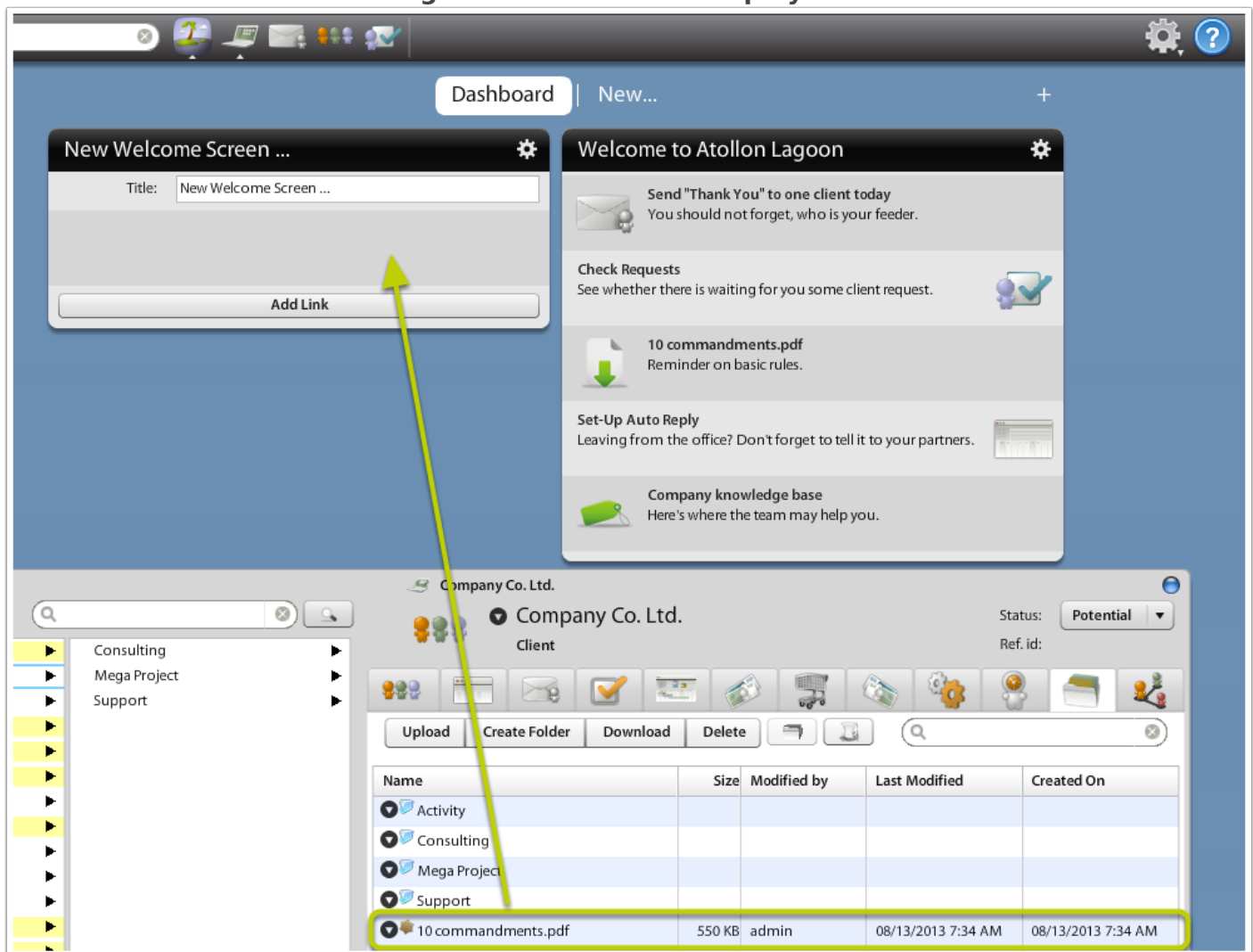
- Finder: fixed deleting Folder, Project or Activity when used in favourite contexts
- Finance: fixed creation of Finance reports

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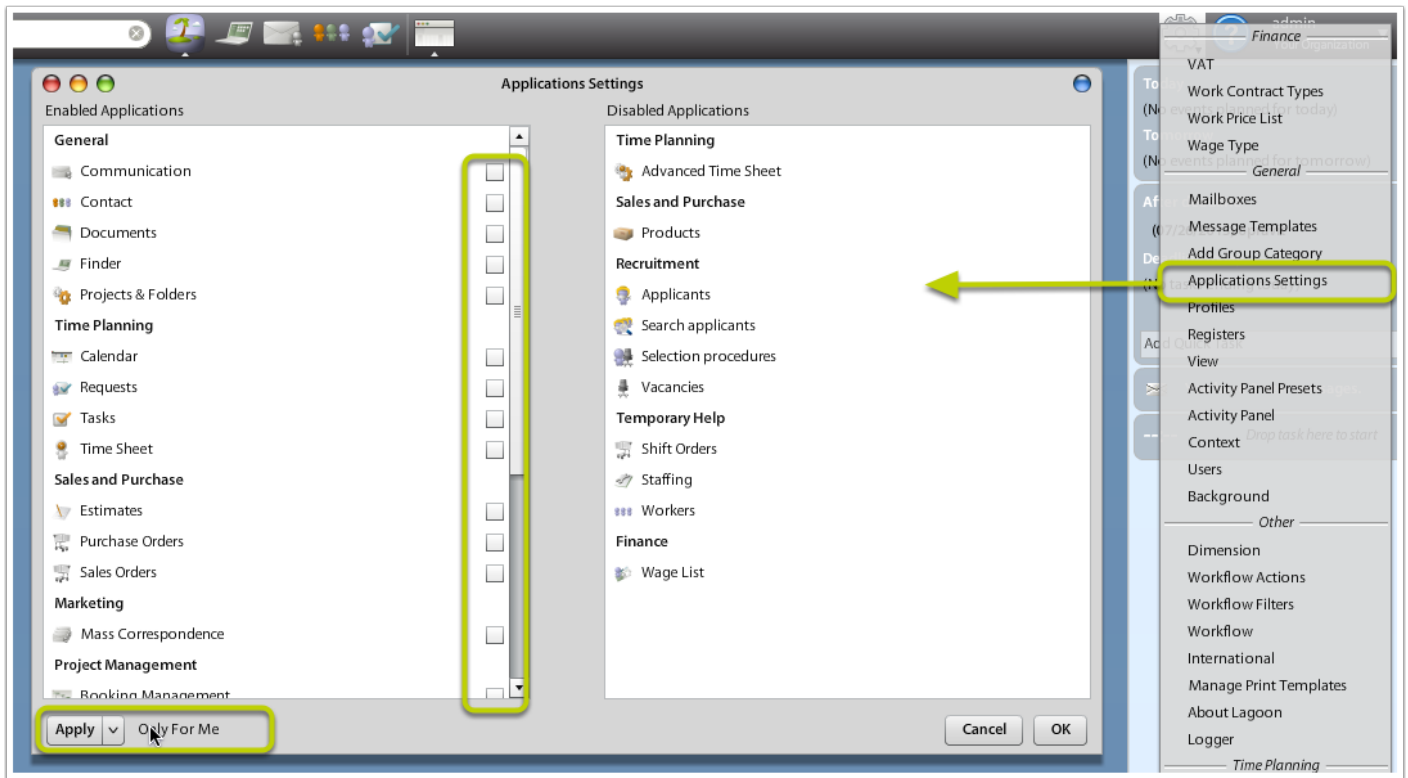
New features

- Dashboard: new **Welcome widget** enables to create **employee intranet**



See Create new Welcome widget how to for more info.

- Core: added **Application Settings** to configure visible applications & toolbar favourite applications



See Application Settings & Toolbar Settings for more info.

- Estimates, Invoices: added option to add product **discounts**

Enhancements

- Core: added dynamic localization & **language switch** on login screen
- Settings: system settings that users can not Edit or are for admins are no more displayed
- Finder: added possibility to set-up **Activity** container **tabs**
- Finder: added option to copy folders (clients) to another organization (in case client is handed over to different organization)
- Access Rights: added GUI option to **remove access inheritance**
- Products: it is possible to set product's default controlling variable for financials (**dimension** in invoicing transaction)
- Projects: by default, all tasks are displayed on project now (changed default filter)
- Project Planning: auto-added user into Notify field, when assigning new Tasks to solvers
- Recruitment: changed sorting position field by Name
- Recruitment: enhanced number of supported print **data for Applicant profile** (+ responsible user's contact details)
- Recruitment: added option to set-up **Position Grades** to evaluate Applicant's suitability to selected position
- Request Tracking: improved **accepting new requests** coming from Atollon Touch
- Request Tracking: option to filter on "who's waiting for" in Lagoon
- Tasks: improved **speed of listing**
- Messaging: **new merge fields supported** (indication of recipient & context/project numbers) - possibility to track clicking on e-mail URL
- Communication: with more mailboxes, it's possible to set which is default

- Reporting & Mass Mail: it is possible now to **send mass mail to all employees/persons** of (selected or all) companies
- Estimates, Invoices: added possibility to **set Activity context** (for more granular reporting)
- Estimates, Invoices: new print data added (project responsible users)
- Estimates, Invoices: smarter checking of VAT settings on transactions
- Estimates, Invoices: added (default) dimensions into transactions for revenue/cost controlling
- Dashboard: clicking on Reporting widget opens the original report
- Calendar, Task: added keyboard shortcut Ctrl+Enter to save the Event / Task
- Documents: changed default sort order

Bug fixes

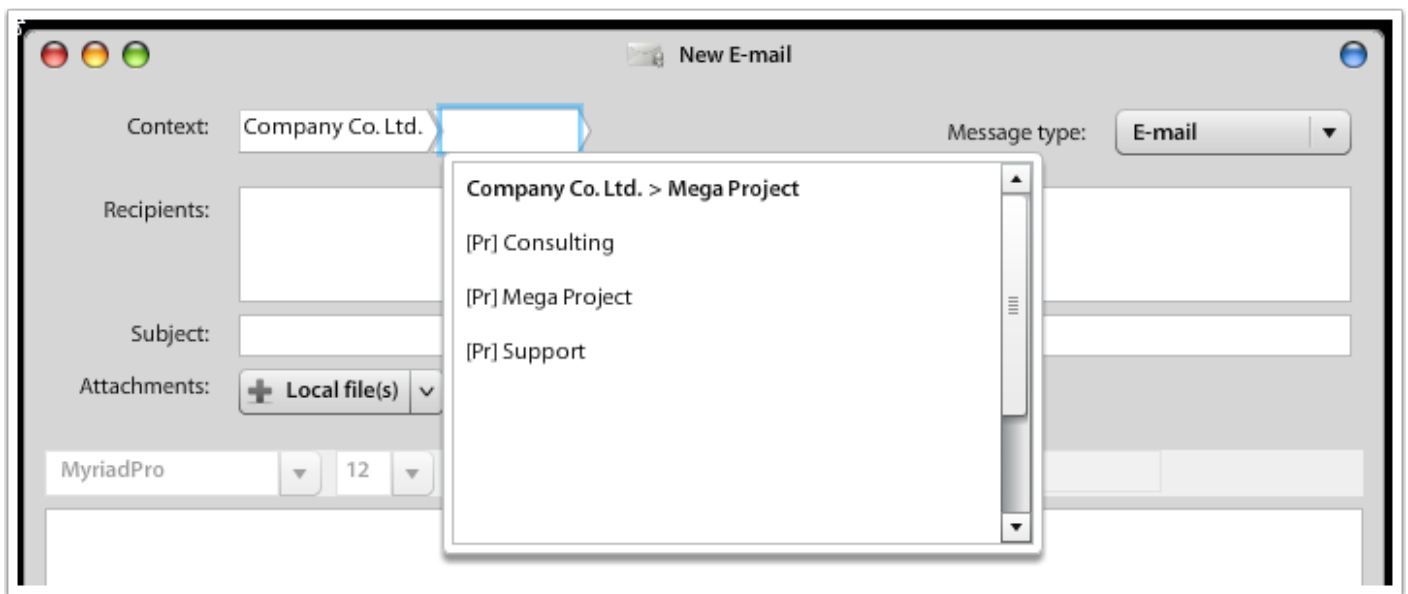
- SLA: fixed service hours settings
- Time Sheet: fixed listing time sheet records, when no Type of Work was set
- Time Sheet: fixed Type of Work on context behavior (when changing context, Type of Work list changes properly)
- Time Sheet: fixed Type of Work number value in settings (for prioritization of sort order)
- Project Planning: fixed listing assigned Tasks, when no date / time was set
- Project Planning: fixed generating Estimate from Project Plan
- Project Planning: fixed calculation of project buffer consumption
- Capacity Planning: fixed calculation of time allocated by assigned Tasks
- Reporting: fixed filtering on boolean (yes/no) values
- Reporting: fixed user selection dialog
- Reporting: fixed filtering on Custom Form on Activity date fields
- Tasks: added auto-refresh when opening (always the latest values are displayed)
- Communication: fixed new context selection when composing message from the context
- Communication: improved performance on reading long messages
- Communication: fixed switching identities when replying to e-mail (recognize proper user's identity)
- Communication: fixed unwanted message refreshing
- Communication: avoided filter resetting when sending message
- Communication: fixed refresh issues when moving message to Activity context
- Communication: fixed outgoing attachments access rights
- Recruitment: fixed candidate search by Vacancy Name field
- Request Tracking: correct locale is selected when notifying recipient
- Request Tracking: several fixes, tighter integration with Atollon Touch
- Estimates & Invoices: fixed opening invoices with user unspecified
- Contacts: fixed for clearing distribution group selection
- Workflow: fixed workflow queue stucking on some of the actions
- Products Price Lists: fixed several bugs, incl. listing inherited prices
- Calendar: fixed deleting repeated events

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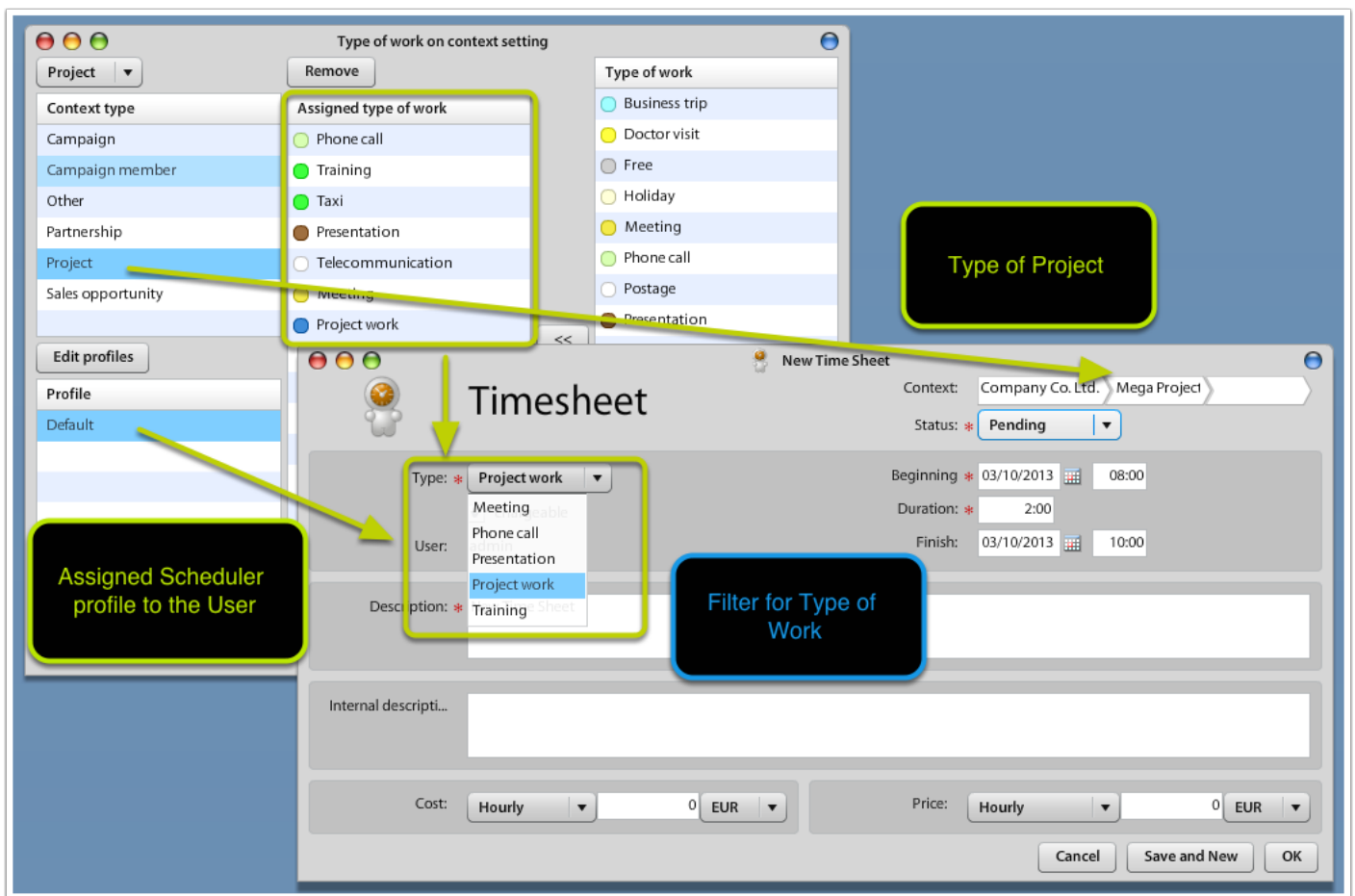
(week 11)

New features

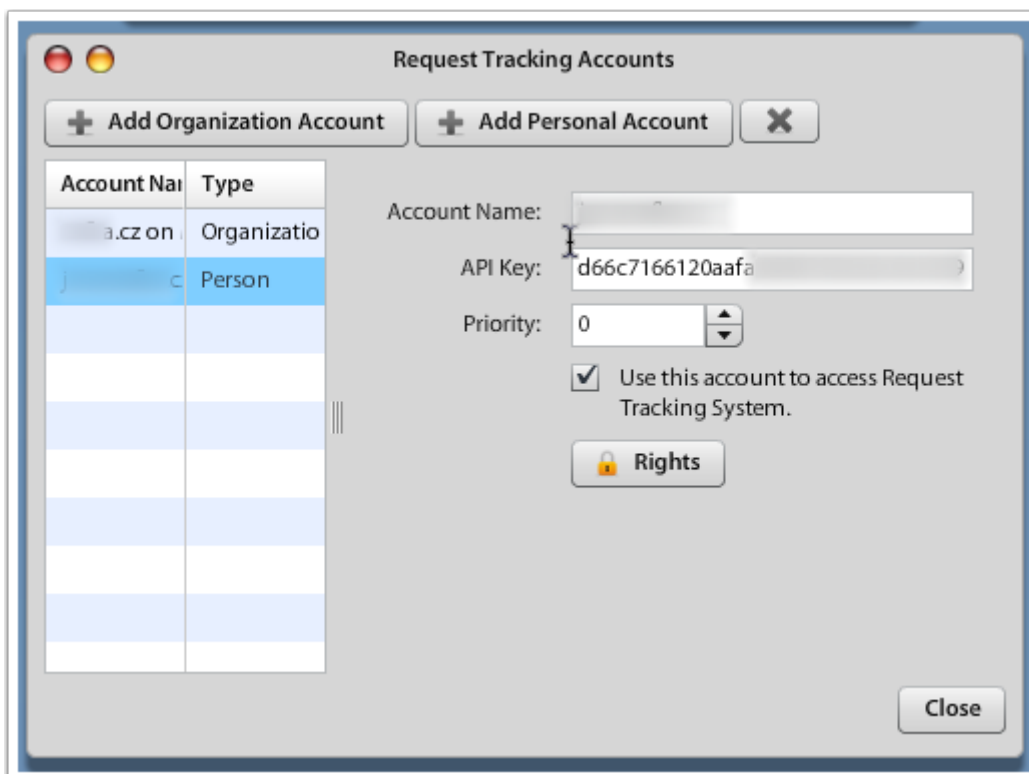
- Core: **Favourite contexts** & **context** / project **selection** component: re-worked the context selection component & the way project is selected on Task, Messaging, Invoices, ...



- Time Sheet: it is possible to define **Type of Work** for **User Profiles** & **Types of Project/Context**



- Requests: possibility to add **Personal Identity** to handle Atollon Touch requests transparently (by the solver)



- Requests: enabled **switching Identity** (company / personal) when dealing with request updates

Enhancements

- Time Sheet: **allowed filtering for "all records"** in sense of time period on context (Client, Project, Activity)
- Time Sheet: allowed fulltext search
- Calendar: tasks are displayed together with events in calendar
- Communication: added progress dialog for multiple messages deleting
- Communication: messaging dashboard widget now displays Seen / Unseen messages
- Communication: possibility to **set message as Unread**
- Custom Forms: possibility to **remove Date value**
- Billing: added possibility to **use Template Items** for regular / repeated billing
- Billing: it is possible to **group billing items** into tree-mode
- Billing: **simplified Billing Item**
- Recruitment: added Applicant name to the window title (more Applicant details may be displayed)
- Context Settings: enabled switching Type of Folder (contact / simple folder)
- SLA: enabled longer response/resolution time to Request than 24 hours
- SLA: now the SLA can be assigned to several (selected) Atollon Touch accounts
- Project Finance Reporting: it's now building finance report views automatically (without need for special maintainance)
- Print Templates: added possibility to download the print template (for further adjustments)
- Product Price Lists: possibility to switch used Price List when adding Products/Items to Estimate / Invoice
- Requests: it is possible to open the Request in separate window now
- Contacts: now it is possible to add Reg. No. & VAT to person contact (needed for self-employed individuals)
- Invoice: the application now remembers the position, size of windows

Bug fixes

- Communication: when replying to e-mail, proper user's identity is used
- Communication: fixed accidental message refresh (which caused lost of focus)
- Communication: fixed **pasting Message Template into the message body**
- Communication: fixed saving Draft messages / avoid closing without saving
- Communication: verification of Request access rights now hidden
- Invoice: forbidden creating invoice without any transaction
- Billing: now saving of the item is verified against interrupted network connections
- Billing: fixed copying Billing Items
- Activity Overview: enabled double-click to view Activity detail
- Contacts: fixed errors when opening Distribution Group
- TimeSheet: fixed occasional instability of TimeTracker used in combination with other Task to TimeSheet forms
- Recruitment: Applicants - fixed displaying status colors
- Project Overview: fixed displaying documents
- Tasks: fixed freezing of application, when Task has no valid status

- Work Contracts: fixed printing multiple work contracts (mixing values)
- Documents: fixed refreshing documents (after new document was added)
- Custom Form: added restrictions on Integer / Decimal edit fields
- Report: fixed possibility to open Activity from report results