

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

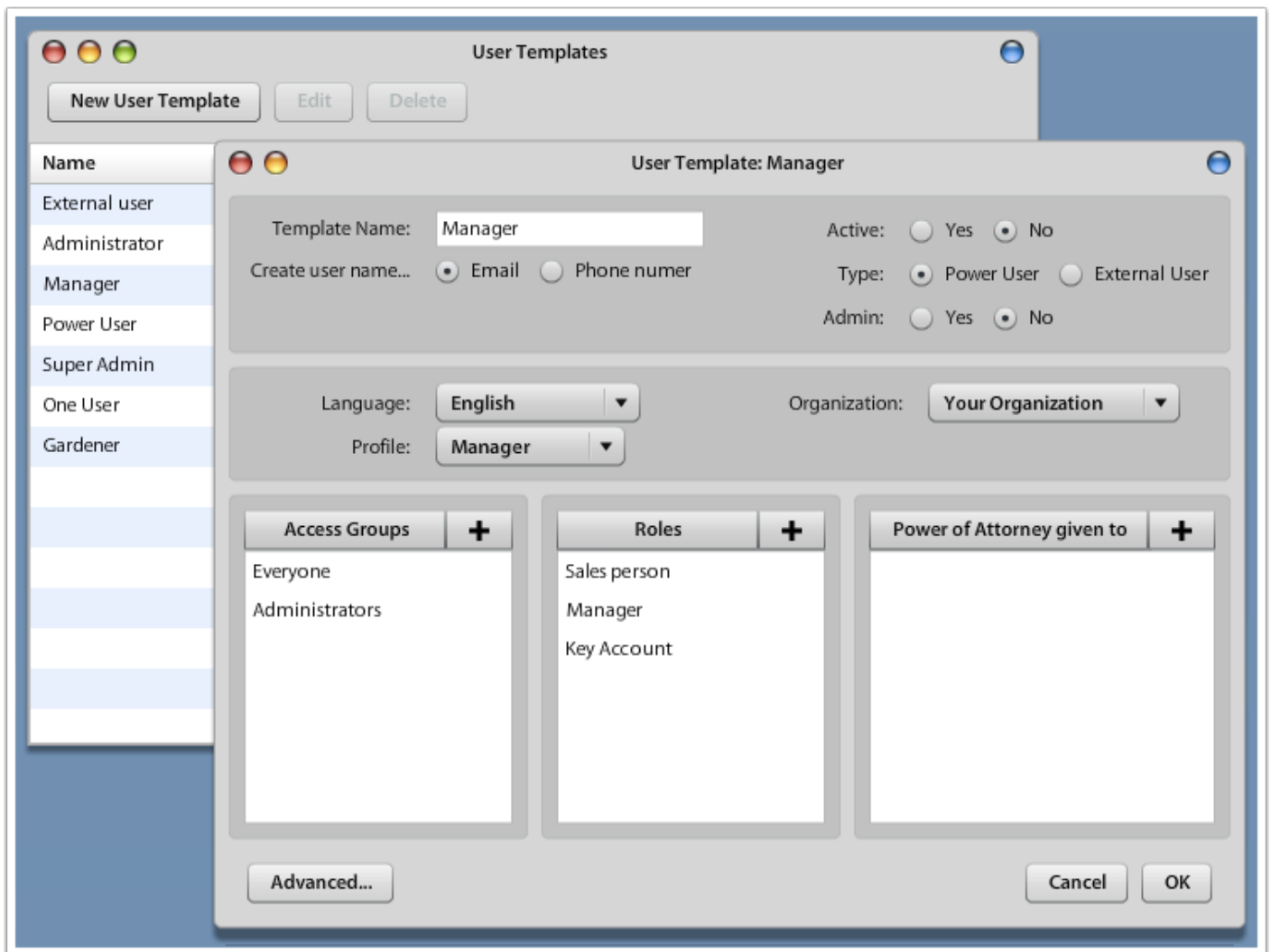
- Contact: fixed large drag & drop contacts to contact groups
- Contact: several bug fixes in saving (new) contact form

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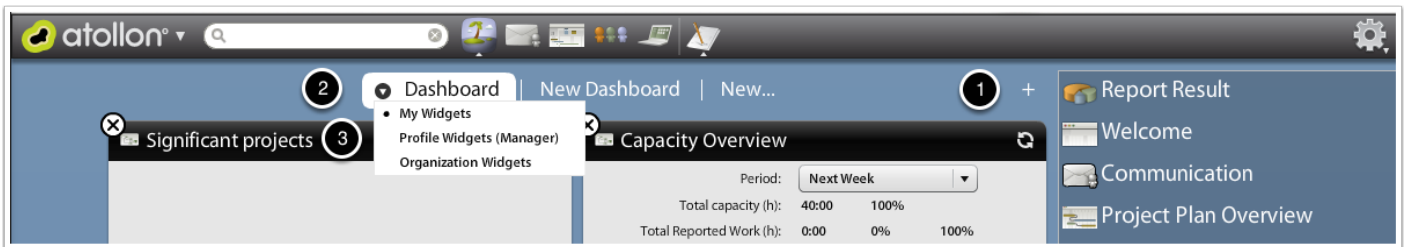
(week 50)

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

The screenshot shows the 'Estimate' form for EST0002. It includes fields for 'Number', 'Journal' (set to 'Estimate'), 'Currency' (set to 'EUR'), and 'Payment method' (set to 'none'). It also shows 'Issued date' and 'Valid until' as 12/17/2013. Below these are fields for 'Created' and 'Modified' by 'Joe Admin'. A section for 'Provider' and 'Customer' information is present. A table lists items with columns for Name, Unit Price, Qty., VAT, Amount, and incl. Tax. The table contains two milestones: 'Milestone 1: Analysis' and 'Milestone 2: Development'. A 'Set discount' button is highlighted with a green box, showing a 'Discount: 20.00%'. The total amount is 'EUR 5,200.00' and the total including VAT is 'EUR 6,240.00'. At the bottom, there are buttons for 'Send for approval...', 'Approve', 'Cancel', 'Apply', and 'OK'.

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

*

*

*

Base Info

Employments

*

Persons

Mass Mail Subscription

☐ Allowed ☐ Forbidden ☐ Unknown

Distribution groups

*

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

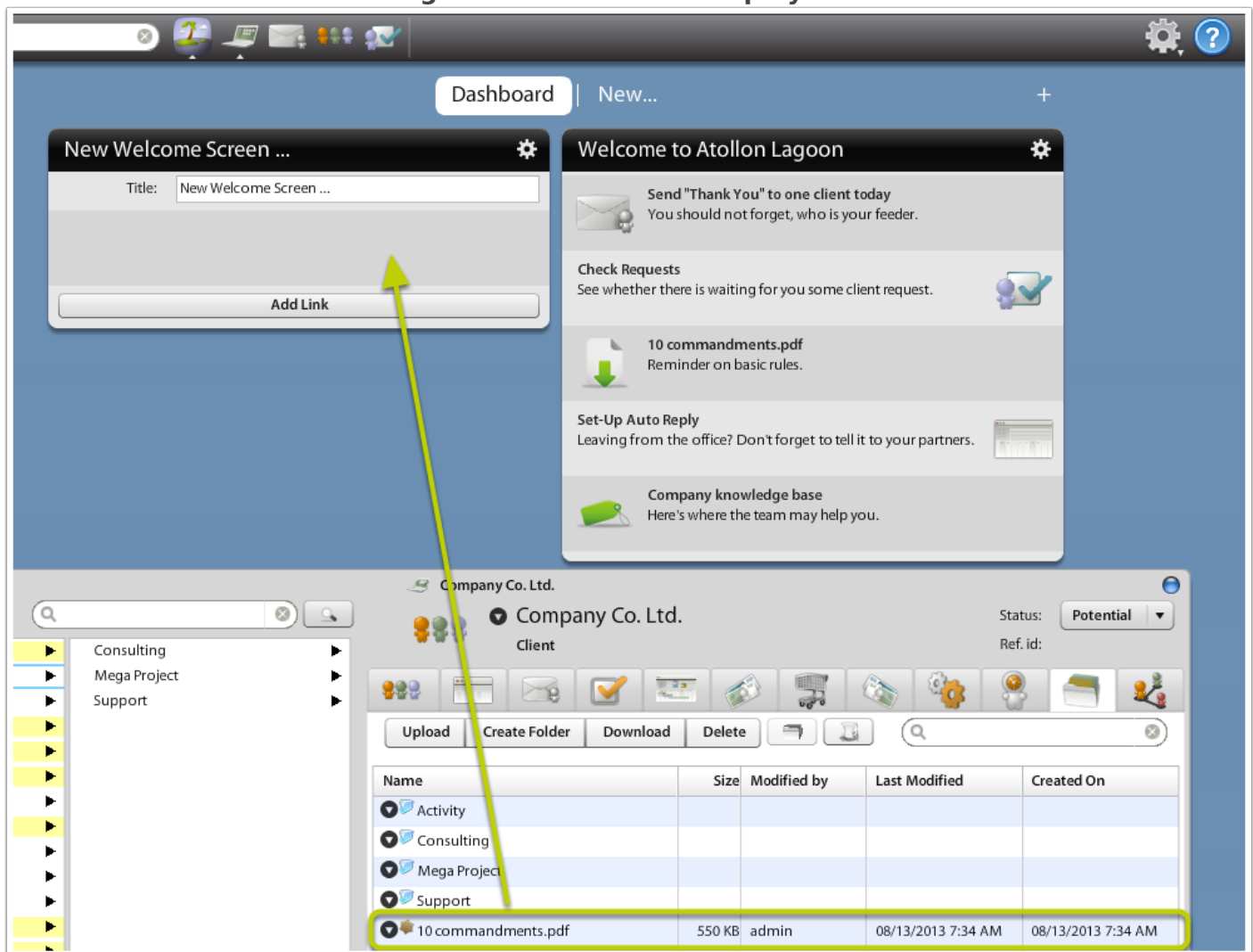
- Finder: fixed deleting Folder, Project or Activity when used in favourite contexts
- Finance: fixed creation of Finance reports

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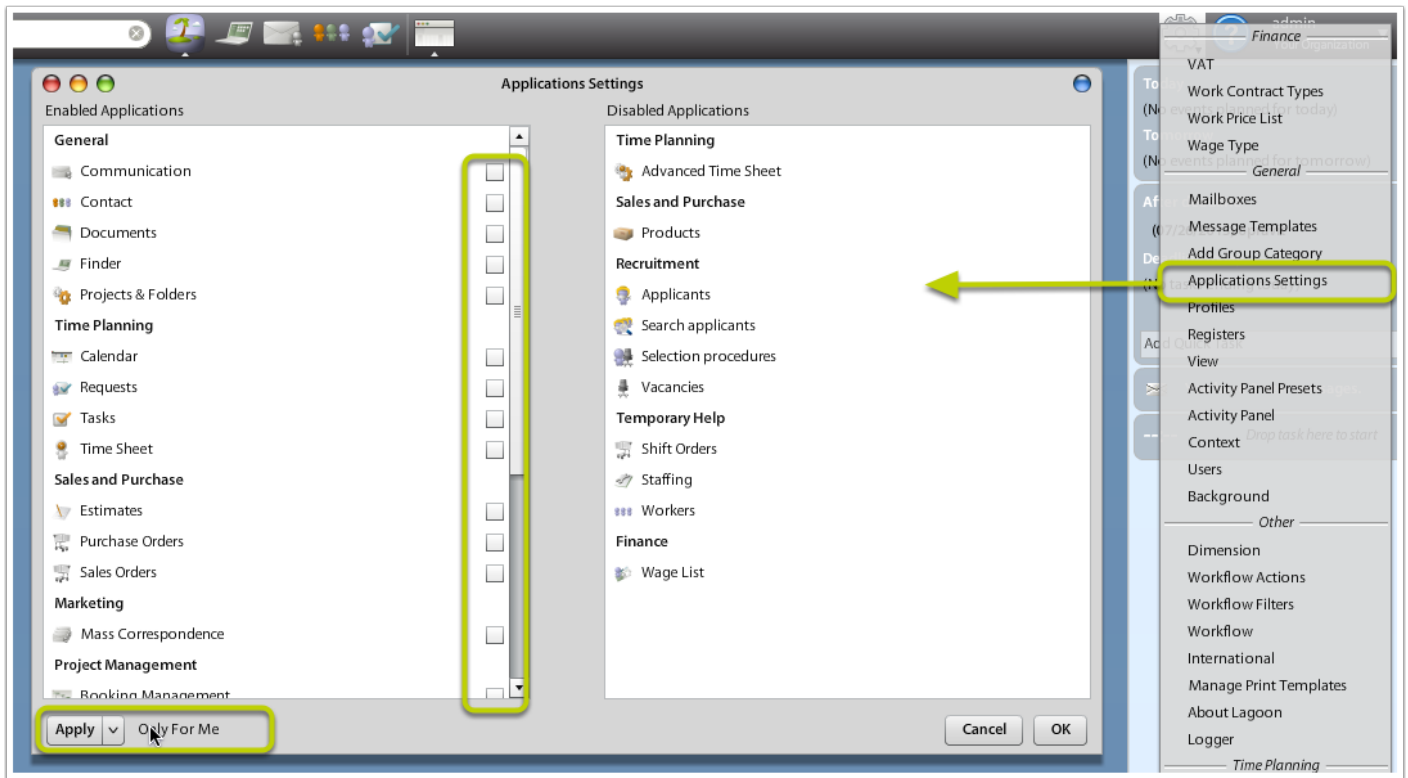
New features

- 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

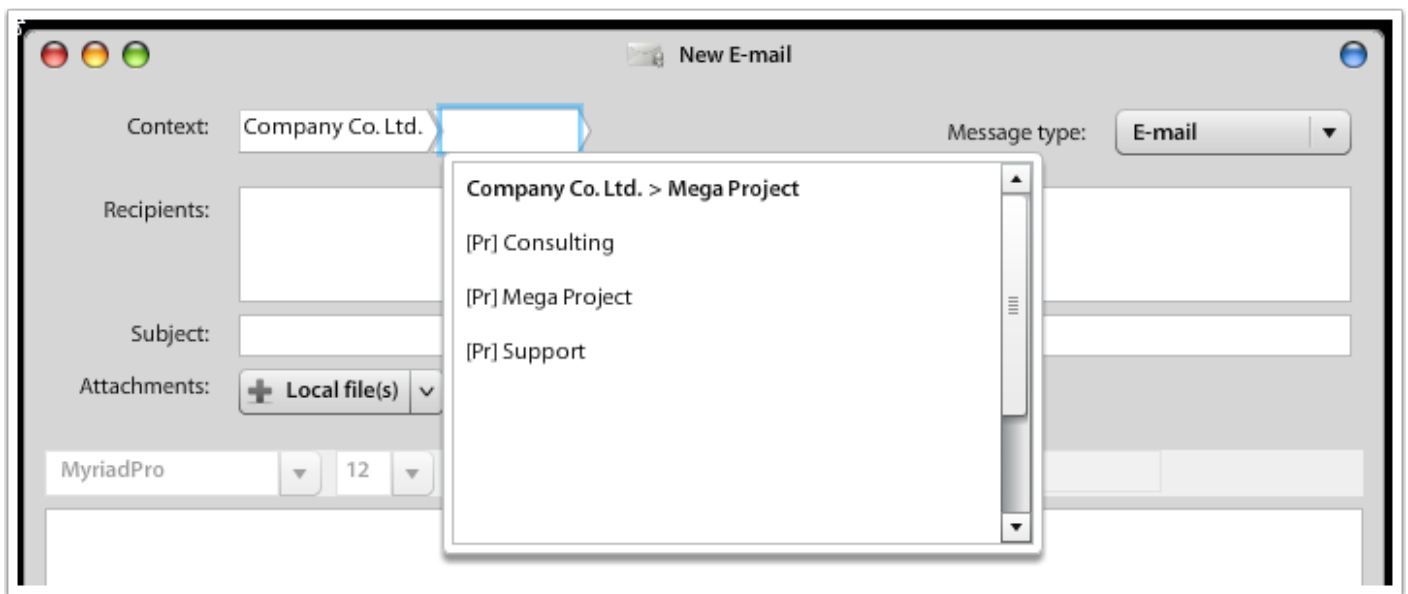
- SLA: fixed service hours settings
- Time Sheet: fixed listing time sheet records, when no Type of Work was set
- Time Sheet: fixed Type of Work on context behavior (when changing context, Type of Work list changes properly)
- Time Sheet: fixed Type of Work number value in settings (for prioritization 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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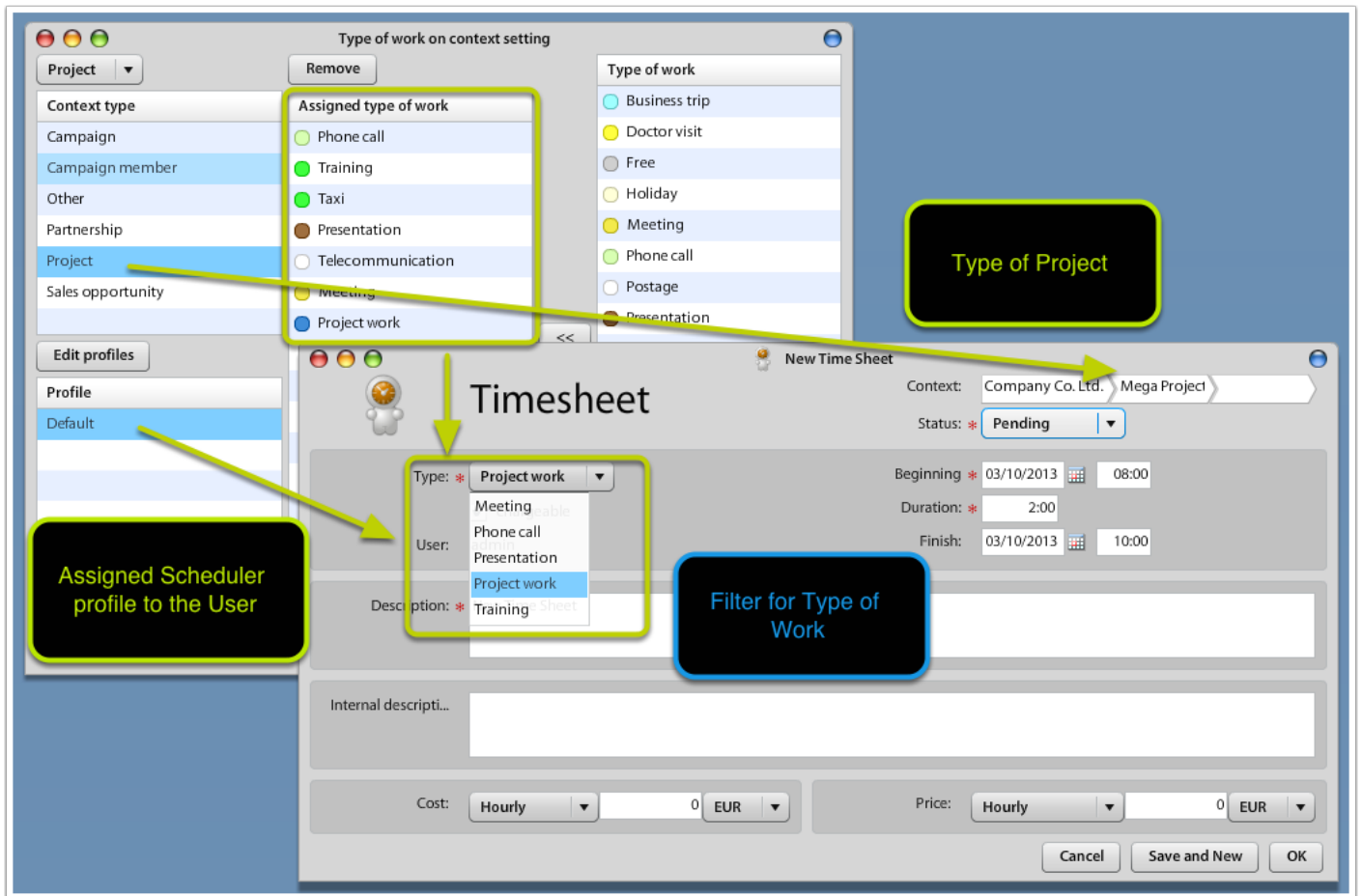
(week 11)

New features

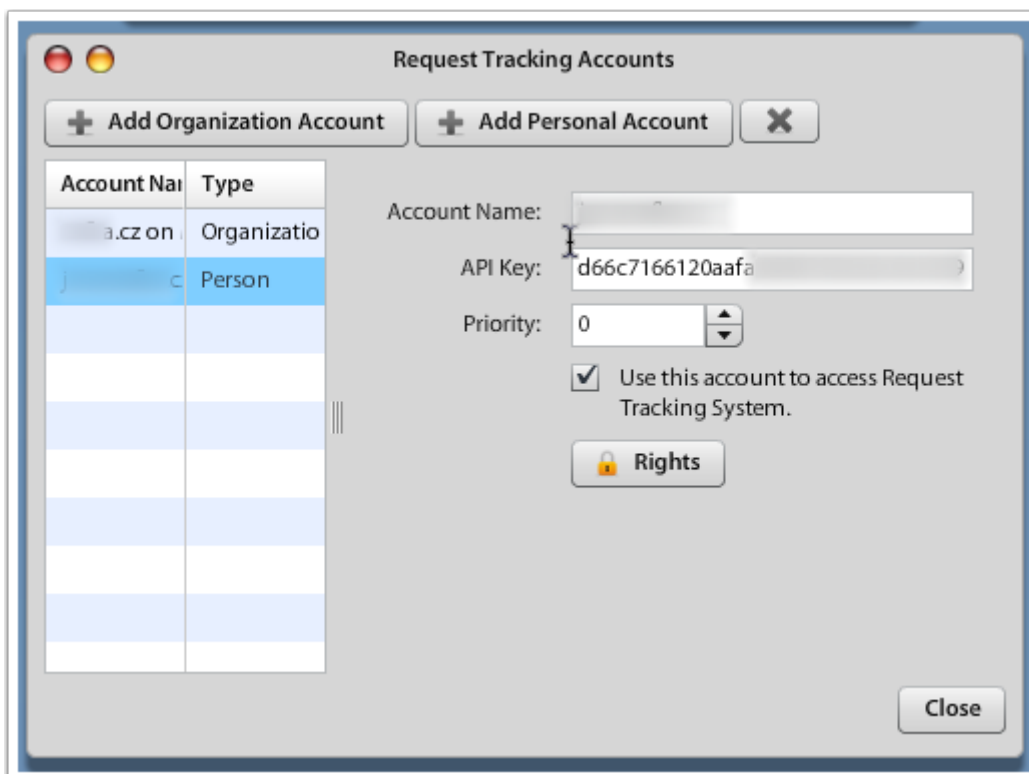
- Core: **Favourite contexts** & **context** / project **selection** component: re-worked the context selection component & the way project is selected on Task, Messaging, Invoices, ...



- 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