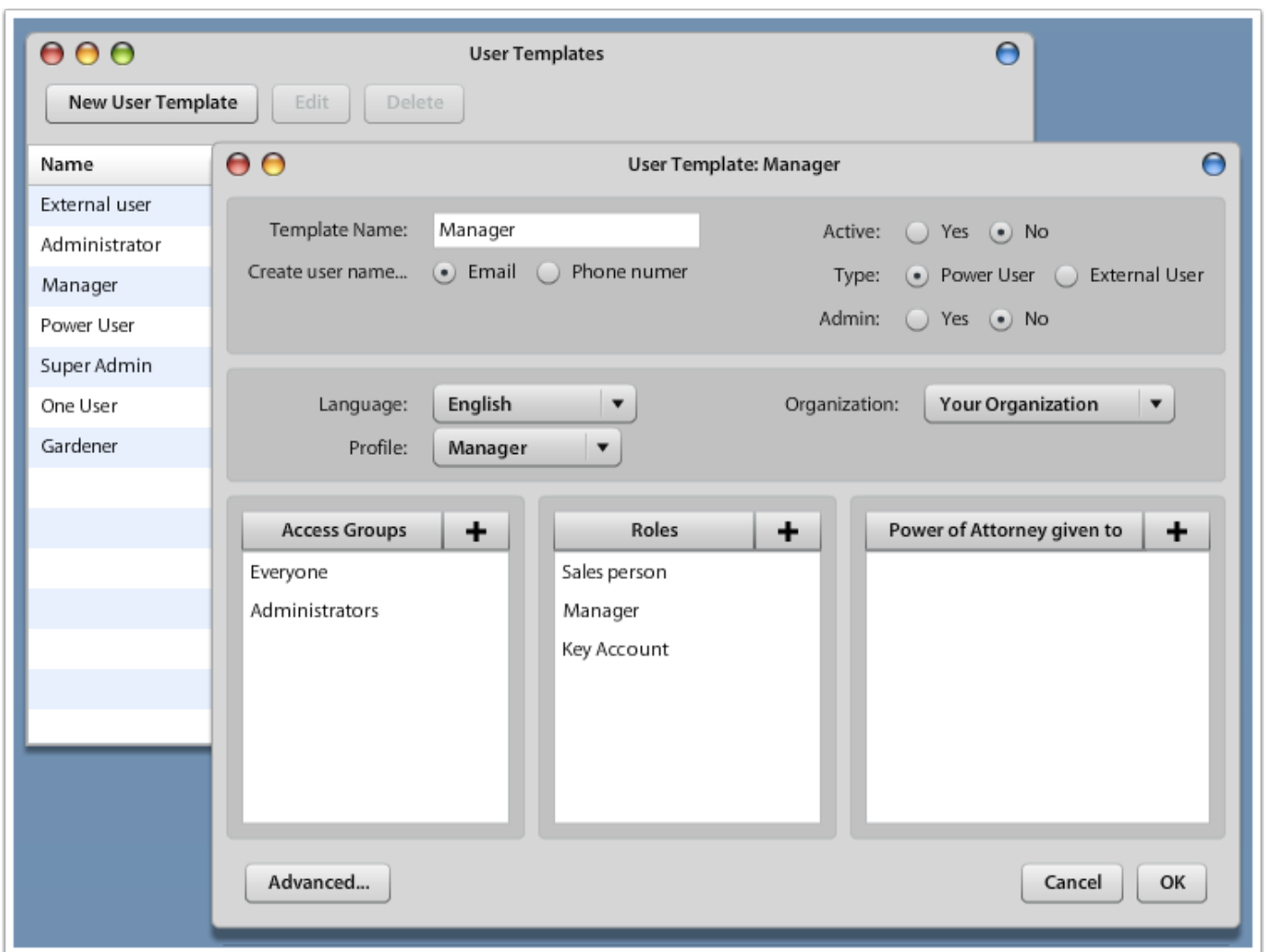


# Atollon Innovations 2013

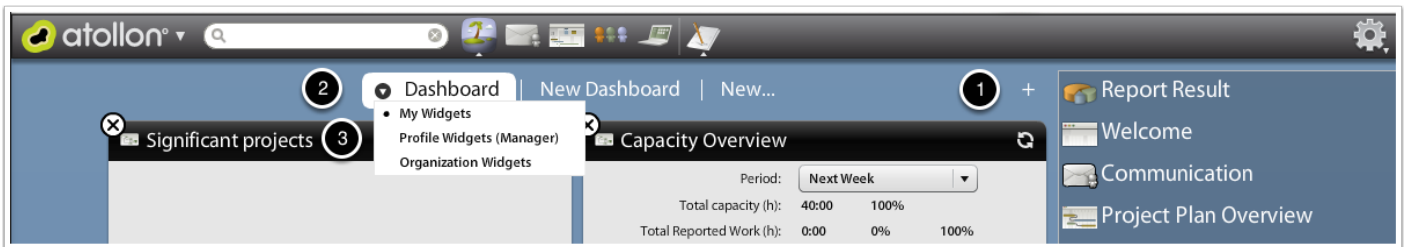
## (week 50)

### 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. The form includes fields for 'Number', 'Journal', 'Currency', 'Payment method', 'Issued date', and 'Valid until'. The 'Context' is set to 'Perfectia, SE' and 'Project'. The 'Status' is 'Issued'. Below these fields, it shows 'Created: 12/17/2013, Joe Admin' and 'Modified: 12/17/2013, Joe Admin'. The form also has sections for 'Provider', 'Customer', 'Dimensions', and 'Comment'. A table lists the estimate items:

Name	Unit Price	Qty.	VAT	Amount	incl. Tax
Milestone 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

At the bottom, there's a 'Set discount' button highlighted with a green box, showing 'Discount: 20.00%'. The total amount is 'Total: EUR 5,200.00' and 'Incl. VAT: EUR 6,240.00'. There are also buttons for '+ Record', '+ Product(s)', '+ Local file(s)', 'Send for approval...', 'Approve', 'Cancel', 'Apply', and 'OK'.

- 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**

Keywords

- 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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Revision #1

Created 25 March 2020 17:19:23 by Jan Safka

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