

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:

Draft Invoice Approval

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

Revision #1

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