

# Atollon 2014 Innovations

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# Atollon Innovations 2014

## (week 39)

### Enhancements

- Call Centre: Enabled auto-login to PBX after user's login into the system
- Time Sheet: Printing Time Sheet records now enable displaying totals of just chargeable work when printing all records
- Time Sheet: Fixed formatting of numeric fields in export (for calculations in spreadsheet SW)
- Invoice: Now it's possible to set Tax value manually (even though it may still be calculated)
- Invoice: It's possible to select analytical account on invoice record (used for further exporting into accounting sw)
- Invoice: It's possible to change management controlling on multiple invoice records at the same time
- Invoice/Estimate: Now it's possible to sort order of records on invoice or estimates
- Invoice: Various improvements and fixes in invoice / estimate calculation
- Finance: Now everywhere analytical account codes + names are visible
- Recruitment: Listing public web vacancies allow sort by Valid From

### Bug Fixes

- Contact: Saving distribution groups in contact detail now more reliable against user mistake
- Time Sheet: When Time Sheet records are locked (for X working days back), it's not possible to change chargeability from the grid
- Invoice: When adding transactions into invoice, correct analytics account (sales / purchase) is added based on Product
- Projects & Folders: Fixed listing Folders from Folders view
- Form Values: Access rights to project / folder forms are now inherited and checked when accessing/updating forms
- Print Templates: Now large Django-based print templates work properly

# Atollon Innovations 2014

## (week 31)

### New features

- New module: Atollon Call Centre
- Billing: New invoice approval workflow
- Finance: Management controlling
- Finance: Loading exchange rates automatically

### Enhancements

- Messages: Auto-forwarding messages to external e-mail addresses
- Recruitment: sorting web vacancies based on Valid from date
- Billing: Recurring Fees - complete overview
- Billing: Recurring Fees - highlighting items that don't generate any Billing Items
- Billing: Show (General Ledger) account numbers in combo fields
- Billing: New workflow: rejecting Time Sheets
- Billing: New workflow: auto-billing any items connected to closed Activity
- Billing: Auto reusing omitted serial numbers
- Received Invoices: changed rounding to 2 decimals
- Estimates: Possible to manually sort rows
- Calendar: Added copy event functionality
- Calendar: Added spinner for events loading
- Finance: Added rate date into currency rates settings
- Finance: Editing numbering for invoices, projects, etc.
- Finance: Editing sequences / last number used
- Messages: Added "Dial" functionality into Phone Call record
- Messages: Possibility to send new request using Atollon Touch
- Messages: Added spinner on loading messages
- Messages: Hidden buttons that have no current meaning
- Contact: Fixed loading / saving contact groups against accidental non-saving
- Contact: Fixed saving Birth Date
- Finder: Preventing opening the same window several times
- Finder: Contact preview optimized
- Finder: Added "Last contact date" to the header

- Finder: Improved editing Note in Finder header
- Reporting: Added tooltip on report description
- Reporting: Added mass responsible user change on folders, projects
- Reporting: Added mass status change for projects & folders
- Calendar: Rights checking before saving the Task
- Recruitment: Moved selection procedures preview to the bottom
- Recruitment: Applicant preview optimized
- Time Sheet: Fixed rounding of Expenses to 2 decimals
- Time Sheet: Valuation performance improved
- Workflow: Mass client status updates trigger workflow actions

## Bug fixes

Server printing: Fixed using larger print templates  
release-week-1418

## New features

- Billing & Invoicing: Possibility to send Invoice with Time Sheet attachment together from Draft invoices

The screenshot displays the 'Automot Bohemia, s.r.o.' software interface. At the top, the client name 'Jiršeňova 612 CZ' is visible. Below the client information, there is a toolbar with various icons and a 'Draft Invoice Approval' button. The main area is divided into two sections: 'Time Sheets' and 'Billing Items'. The 'Time Sheets' section shows a table with columns for Number, Taxation Date, Due Date, Provider, Client, Project, Total Amount, and To be paid. The 'Billing Items' section shows a table with columns for Item, Ge..., Uni..., Qu..., VAT, Tot..., Bil..., Bil..., Fol..., Pr..., Inv..., Pr..., De..., Tot..., and Us... A green arrow points to the 'Print to Email' button at the bottom left of the 'Billing Items' table. The interface also includes a sidebar with 'Invoice States' and a top bar with 'New', 'Edit', 'Use Template', 'Prepare Draft Invoice', and 'Filter...' buttons.

Number	Taxation Date	Due Date	Provider	Client	Project	Total Amount	To be paid
	05/13/2014	05/27/2014	Best Provider	/	Payroll	0.00 EUR	0.00 EUR
	03/31/2014	05/27/2014	Best Provider	/	Project	635.00 USD	870.00 EUR
	01/31/2014	05/27/2014	Best Provider	/	Payroll	0.00 USD	0.00 EUR

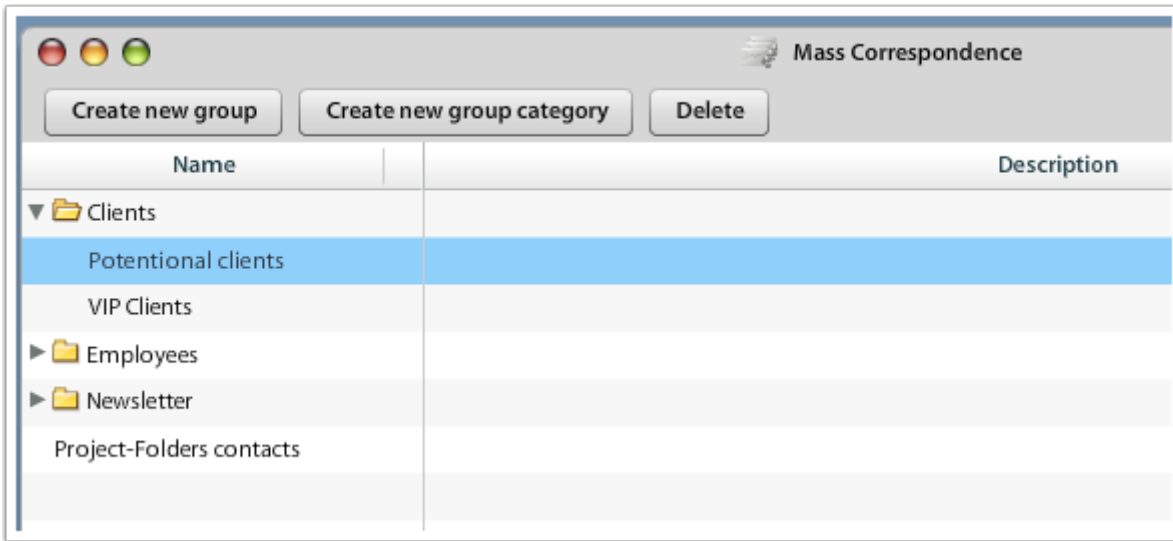
Total: 725.33 EUR Total with VAT: 869.95 EUR To be paid: 870.00 EUR

Item	Ge...	Uni...	Qu...	VAT	Tot...	Bil...	Bil...	Fol...	Pr...	Inv...	Pr...	De...	Tot...	Us...
Chargeable time	Yes	993.61 U	1	20%	993.61 U	For Appr	03/01/20	Automot	Project				1,192.34	0.00

Print to Email

Delete Approve Draft Postpone Avoid Billing

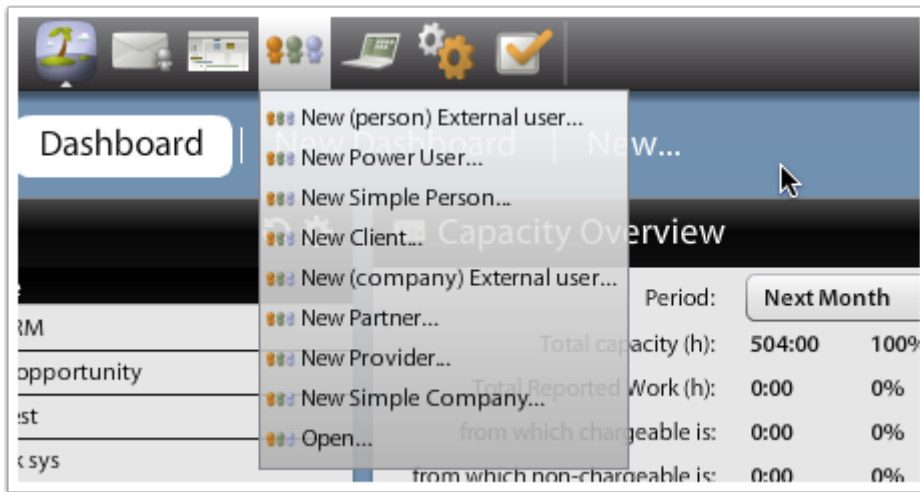
- General: User password has more strict rules + it's change can be enforced after next login
- Mass Mail: Possibility to enter / delete distribution group categories (folders for better group organization)
- Mass Mail: Possibility to add / remove contact distribution groups



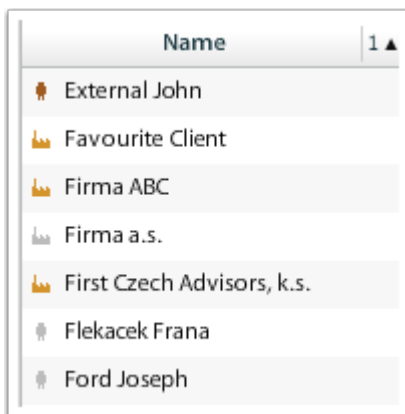
- Finder: Contact preview added to the Finder folder's header

## Enhancements


- Billing & Invoicing: Improvements in editing recurring fees (required fields, hints, entering merge fields)
- Billing & Invoicing: Added new filters for Billing Items (by Product, Activity type, Project type)
- Billing & Invoicing: Automatically adding Delivery contact address, if available in contact
- Billing & Invoicing: Added indication about items (from Time Sheets) that have been created automatically during Draft creation
- Billing & Invoicing: Removed restriction about Free quantity in Billing Items (now any combination of Unit Price x Price vs. Free Qty + Fixed Fee works)
- Billing & Invoicing: Added indication of billing period into Time Sheet or Invoice print
- Contacts: Added option to quickly create new contact + folder (Client, Partner, Applicant, etc.)



- Contacts: Improved identification whether contact has folder or not in the list of contacts



- Finder: Better performance of opening projects on large databases (hundreds thousands of projects)
- Project: Better performance of selecting responsible users
- Recruitment: Better performance of Applicants listing
- Recruitment: Rewritten selection of locations (now possible to search by ZIP code)
- Recruitment: Unified view on applicant from both Finder & Applicants database



Testing Applicant

Uchazeč (0)

222300999

799888999

jana@testing.com

První přespolní











12000, Praha 2

Hlavní město Praha

Czech Republic (Ceska Republika)

Aktivní

This is multiline comment to your best talents


 Profile
 








► Employment history

Former Employer Co. Ltd.: TOP manažer (Finanční oddělení)

Nejlepší poskytovatel: Office Manager (IT oddělení)

Atollon Limited

Náš první partner: Asistent (Fakturace)

► Applicant detail

Salary: 0

Actual job: Former Employer Co. Ltd.,  
Finanční oddělení, TOP manažer ( - )

► Skills

Computer skills and competences, Ability to learn new software applications, Advanced, 3, 2010

Computer skills and competences, Managing files, ---

Driving licenses, Private cars, ---

Managerial and organisational skills, Management of material resources, ---

Managerial and organisational skills, ---, ---

Personal skills and competences, Inventiveness, Average, 5, 2010

► Education

Certification, MSCE, ---

Master's Degree or Equivalent, Master of Public Administration (MPA), ---, 0

► Languages

Czech: Native language, Very well, Average

English: Advanced

► Locations

- Recruitment: Automated labelling of CV document type in Applicant's document upload (both Finder and Applicants database)
- Recruitment: Added basic recruitment workflow -> relation of Selection Procedure status to project status settings (requires set-up)
- Recruitment: Vacancy status in Vacancies overview is identified by color
- Time Sheet: Improved performance of Time Sheet listing

## Bug fixes

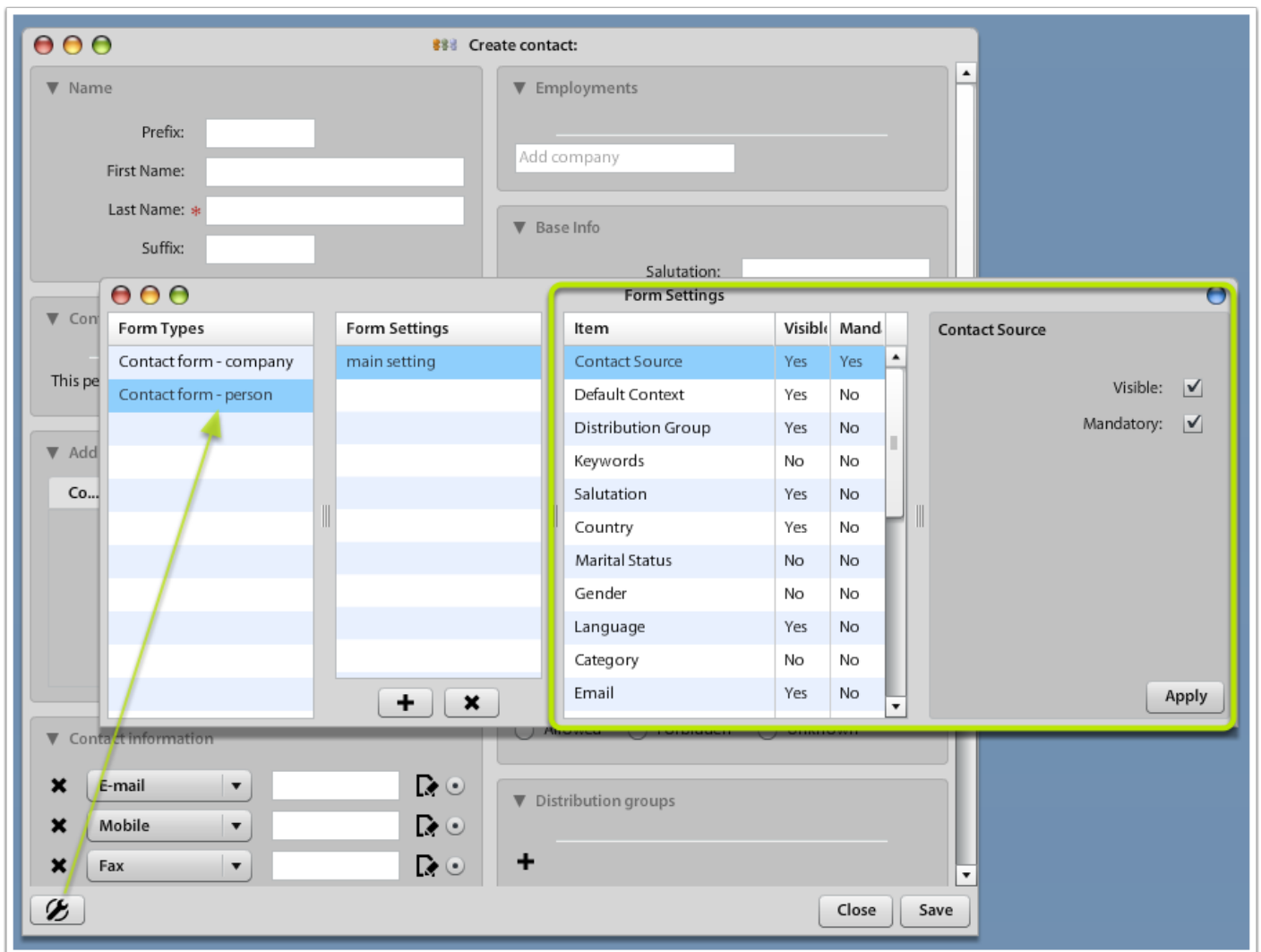
- Billing & Invoicing: Fix filtering on billing items
- Contacts: Fixed selecting primary contact information
- Expenses: Quantity of expense may now be entered with decimals
- Recruitment: Fixed refresh of recent employments after their update in contacts
- General: When export is forbidden, export options are no longer available

# Atollon Innovations 2014

## (week 10)

### New Features

- Full contact form fields customization (fields visibility & mandatory fields)

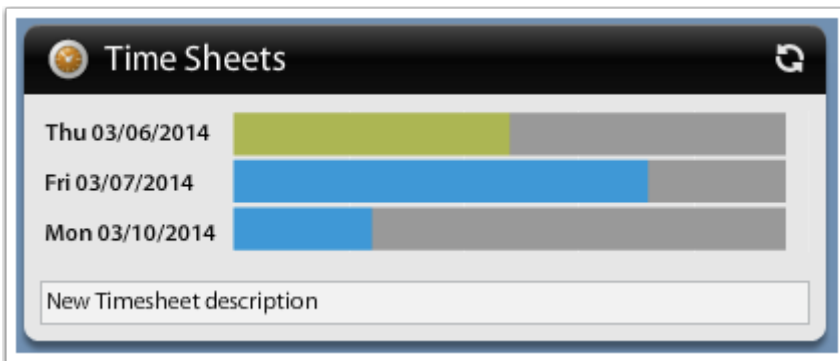


### Enhancements

- Billing & Invoicing: Added filter for invoice amount (from .. to)
- Billing & Invoicing: Added possibility to extend general Billing / Time Sheet rules for each individual client



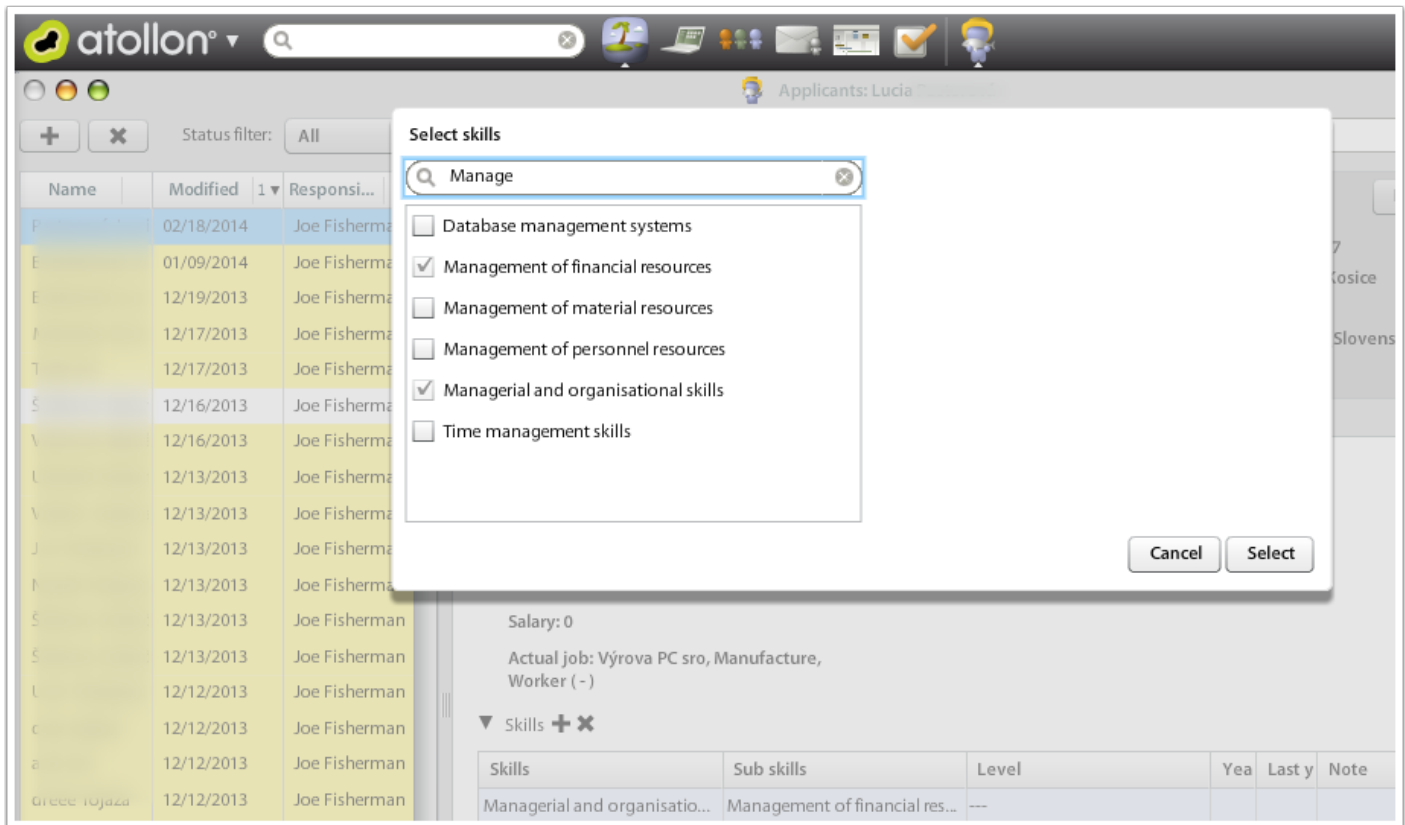
- Billing & Invoicing: Prevent saving Billing Rules without setting Time Sheet rules
- Billing & Invoicing: Added Header & Footer text of Invoice on printout (coming from Billing Rules)
- Billing & Invoicing: Possibility to Postpone & Avoid billing of the Draft invoice (incl. Billing Items & Time Sheet)
- Billing & Invoicing: Possibility to configure new Journals (where 0 VAT may be applied for foreign invoices)
- Time Sheet: Added progress indication
- Time Sheet: Added new grouping option: by Price (to see what rates have been used & whether there are 0 rates)
- Time Sheet: Replaced the Dashboard component motivating data entry to chart-based



- Invoicing & Estimates: Possibility to copy transaction(s) on Invoice / Estimate
- Recruitment: Added possibility to add closed vacancy to Applicant & improved vacancy list component

The screenshot displays the 'Testing Applicant' form. At the top, there are icons for a person and a group, followed by the title 'Testing Applicant' and an 'Edit' button. Below this, there are fields for 'Sex:', 'Marital status:', and 'Applicant description:'. The 'Ref. Id:' is set to '0'. The form has several tabs: 'Profile', 'Selection procedures', 'User Form', 'Communication', and 'Documents'. The 'Selection procedures' tab is active, showing a table with columns 'Date', 'Client', 'Name', 'Folder', and 'Status'. The table contains one row with the text 'Vacancy: IT Manager'. Below the table, there is a checkbox labeled 'Show closed projects' which is highlighted with a yellow box. There are also buttons for 'Open vacancy' and 'Open placement'.

- Recruitment: List of applicants on vacancy stretched on full size of the form
- Recruitment: Searching in the list of skills



- Recruitment: Added possibility to search in the list of positions (when adding new position to candidate in employment history)
- Reporting: Added optional refresh of background finance data for finance report(s) - slow on large instances
- General: When app is log-out, it is automatically refreshed with new login
- General: Added possibility to set rights of users to other user's Time Sheet, Tasks, Calendar (Events)

## Bug fixes

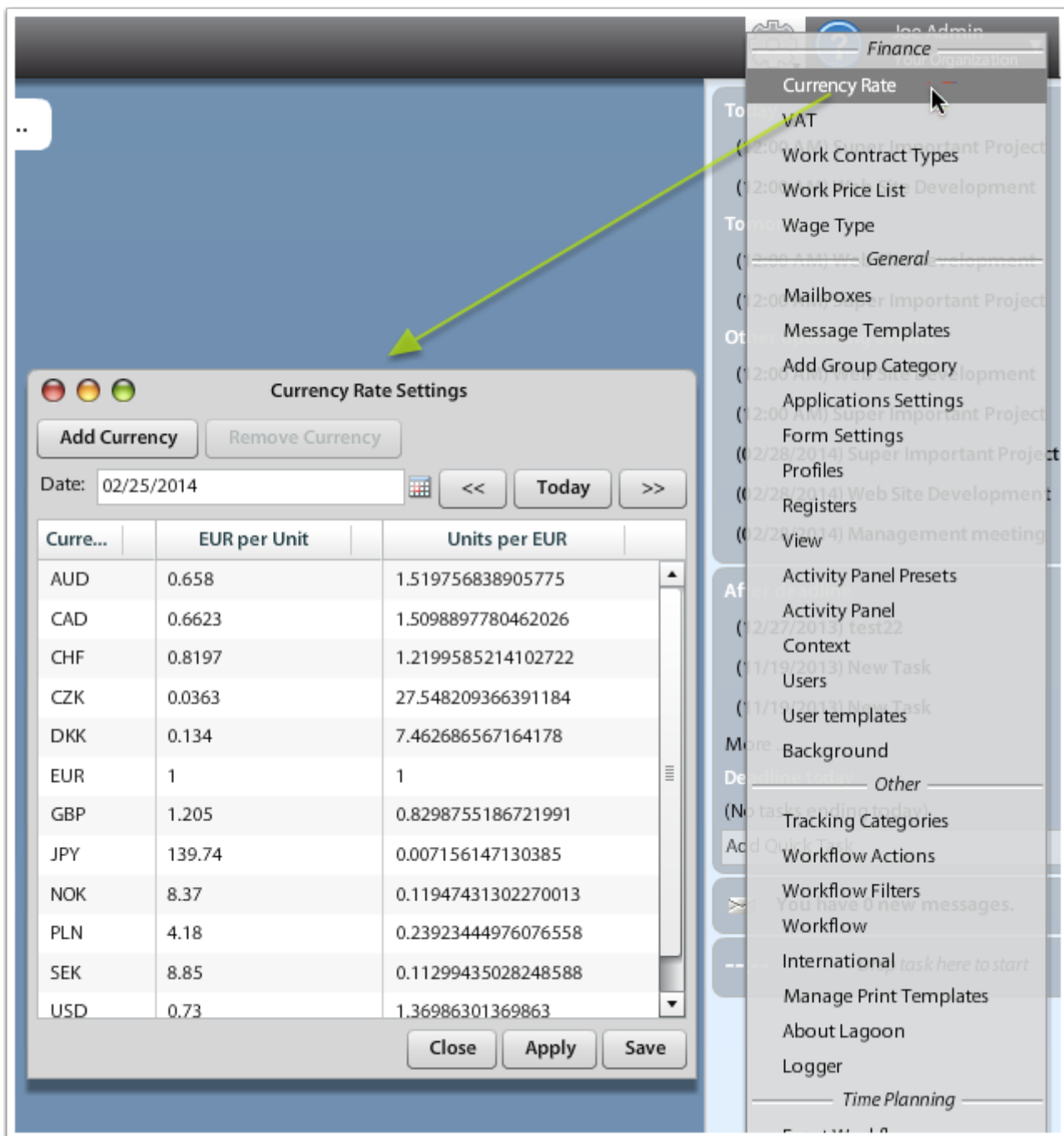
- Estimates & Invoices: Fixing broken Unit Price
- Recruitment: Adding company to applicant is now smoother
- Tasks: Slower refresh due to large implementations for increased performance
- Messaging: When sending multiple e-mail attachments, sometimes the contents was mixed in experimental app server
- Messaging: To field - not all recipients received the e-mail in experimental app server

# Atollon Innovations 2014


## (week 04)

### New features

- Billing & Invoicing: Added possibility to edit currencies
- Billing & Invoicing: Added possibility to edit exchange rates (for foreign currency billing)



- Billing & Invoicing: Added welcome screen on client's folder detail (unfinished)











Red Dwarf








Client

Status: Current

Ref. id:




Billing



Welcome To Billing

Billing Details

Recurring Fees

Billing Automation

When setting-up new client:

Set-up Billing Rules

Set-up Recurring Fees

Set-up Work Price List (Rates)

Select Products/Services Price List

Any time during billing period:

Enter Time Sheet

Enter Fees in Billing Details

All confirmed entries are considered when creating new Draft Invoice.

Any time when sending invoices:

Approve Draft Invoices

When setting-up organization:

Set-up Organization Billing Rules


Set-up Standard Work Price List

Set-up Product Price List

☐ Hide Welcome screen

- Billing & Invoicing: Added Recurring Fees functionality for automated Fixed Fees creation

Services

 **Recurring fee**

Context: \* Red Dwarf Project

Item: \* ☒ Services

Name: Recurring service

Billing Status: \* Pending

Billing Date: 02/25/2014

Taxation Date:

Valid From: 02/25/2014

Valid To: 02/02/2015

Frequency: Monthly

Purchase: 30.00

Catalog Price: 100.00

Margin (%): 0.00

Currency: \* EUR

VAT: \* 20%

Unit Price: 30

Total Quantity: 1

Free Quantity: 0

Fixed Price: 300

Description:

Team:

**Total: 330.00 Including VAT: 396.00**

Cancel Save And New Save

- Task Management: Added option to select solver (responsible user) automatically when creating new Task
- Time Sheet: Standard texts functionality added

## Enhancements

- Billing & Invoicing: Improved setting Unit Price (needed for automated use of free service hours)
- Billing & Invoicing: Indication of Used free service hours
- Billing & Invoicing: Now it's possible to approve / confirm Billing Items from (client) contact folder
- Billing & Invoicing: Easily customize global Billing Rules on (client) contact folder
- Finder: Added indication of Activity Reference number into lists
- Time Sheet: New Time Sheet entry is automatically confirmed & price is added, if missing
- Tasks: New Task - app now remembers values (Reminder setting)
- Calendar: New Event - automated moving To: date when From: date is changed
- Contact: Possibility to upload basic contact data for entrepreneurs/persons automatically (CZ + SK)
- Contact: Removed "Due Days" field > moved to Billing Settings on contact folder

- Users: New option to show only active users
- New project wizard: Improved & simplified layout
- Recruitment: Added name of the contact information type (such as e-mail personal or e-mail work)
- Recruitment: Selection Procedures functionality moved to separate Tab for optimal displaying
- Recruitment: Saving candidate profile data progress indication

## Bug fixes

- Contact: Duplicity check is executed even when using auto-contact lookup & VAT entering
- Billing & Invoicing: When invoice is deleted, it's possible to use records again for creating new invoice
- Billing & Invoicing: Fixed calculation of total amounts (now properly recalculated based on Exchange Rates from foreign currency)
- Workflow: Fixed saving time-managed actions
- Document Library: Fixed escaping special characters, when loading documents using Web Services API (web integrations)