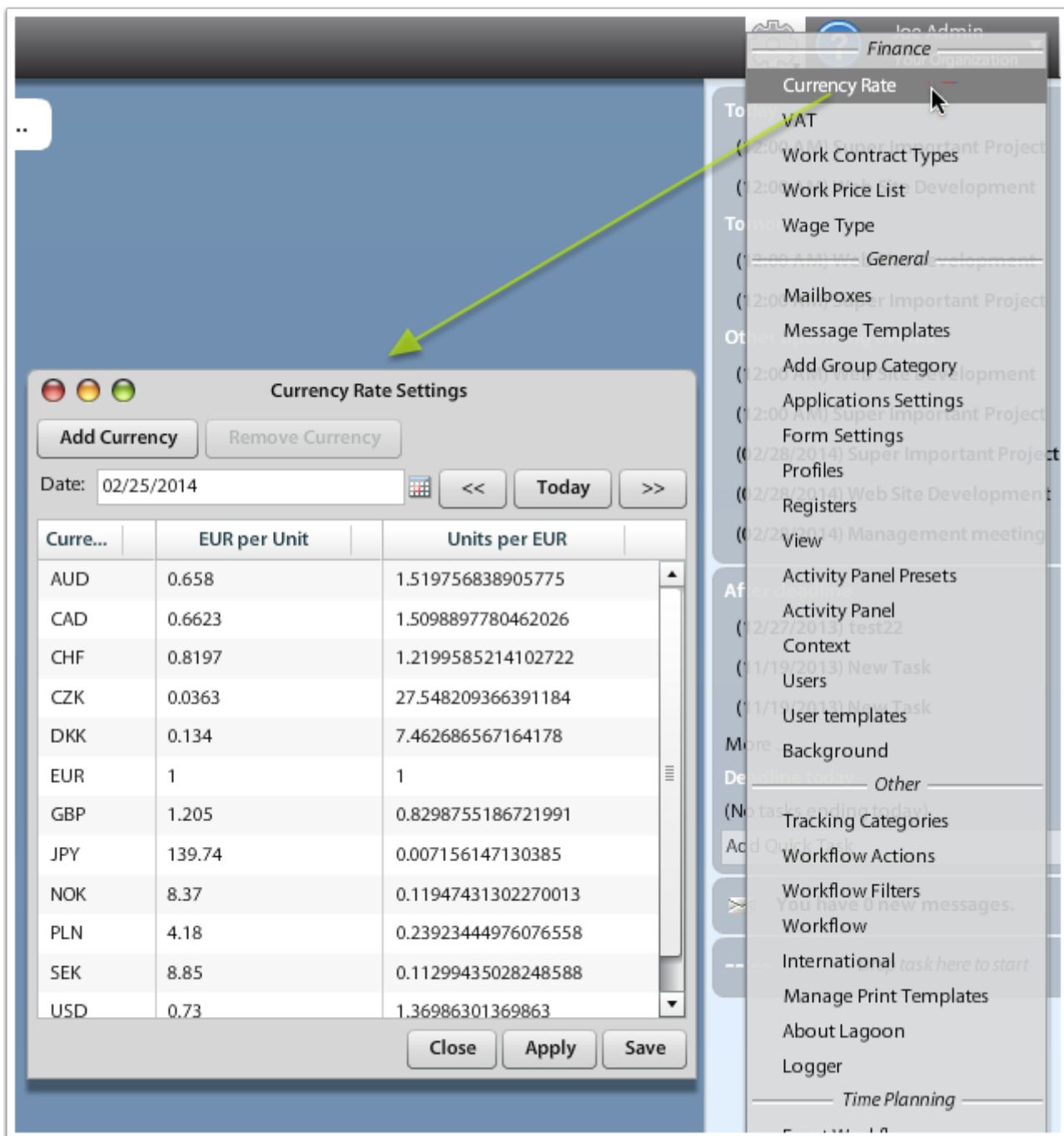


Atollon Innovations 2014


(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:

Billing Status: * **Pending**

Billing Date:

Taxation Date:

Valid From:

Valid To:

Frequency: **Monthly**

Purchase: 30.00 Margin (%): 0.00

Catalog Price: 100.00

Currency: * **EUR**

VAT: * **20%**

Unit Price:

Total Quantity:

Free Quantity:

Fixed Price:

Description:

Team:

Total: 330.00 Including VAT: 396.00

- 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)

Revision #2

Created 25 March 2020 17:15:46 by Jan Safka

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