

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

Automot Bohemia, s.r.o. Potential

Client: Jiriskova 612 CZ

Buttons: New, Edit, Use Template, Prepare Draft Invoice, Filter...

	Number	Taxation Date	Due Date	Provider	Client	Project	Total Amount	To be paid
All 499,586.95 EUR		05/13/2014	05/27/2014	Best Provider	/	Payroll	0.00 EUR	0.00 EUR
For Approval 869.95 EUR		03/31/2014	05/27/2014	Best Provider	/	Project	635.00 USD	870.00 EUR
This Month 0.00 EUR		01/31/2014	05/27/2014	Best Provider	/	Payroll	0.00 USD	0.00 EUR
Previous Month 0.00 EUR								
Overdue 498,717.00 EUR								

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

Invoice States: All states, Drafts, Issued, Paid, Partially paid, Disapproval, Demanded, Cancelled

Time Sheets | Billing Items

Copy... Remove

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

Mass Correspondence

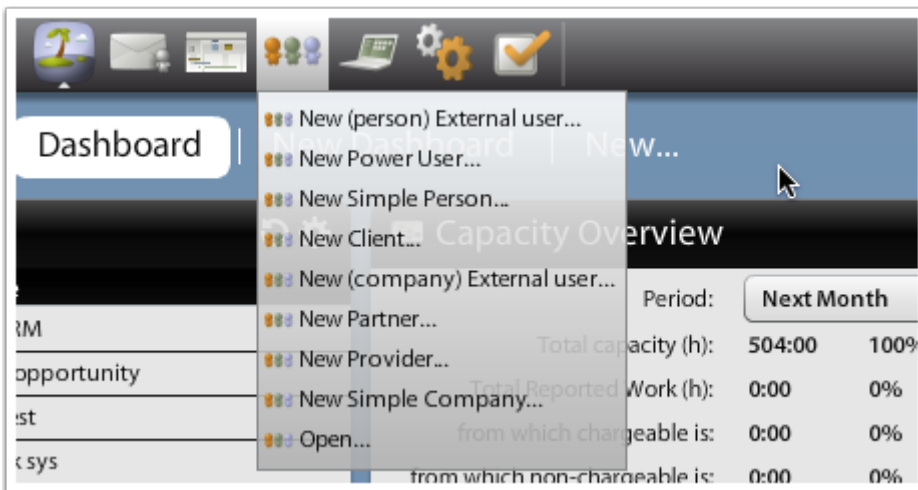
Buttons: Create new group, Create new group category, Delete

Name	Description
▼ Clients	
Potential clients	
VIP Clients	
► Employees	
► Newsletter	
Project-Folders contacts	

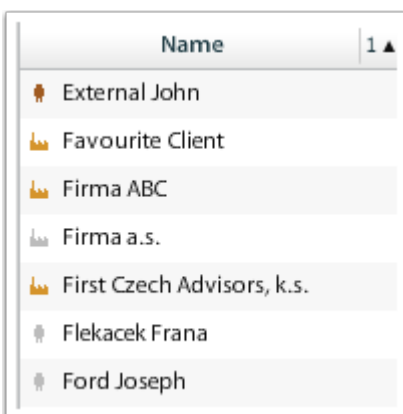
- Finder: Contact preview added to the Finder folder's header

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)

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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

