

# 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

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

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

Invoice States:

- All states
- Drafts
- Issued
- Paid
- Partially paid
- Disapproval
- Demanded
- Cancelled

- 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

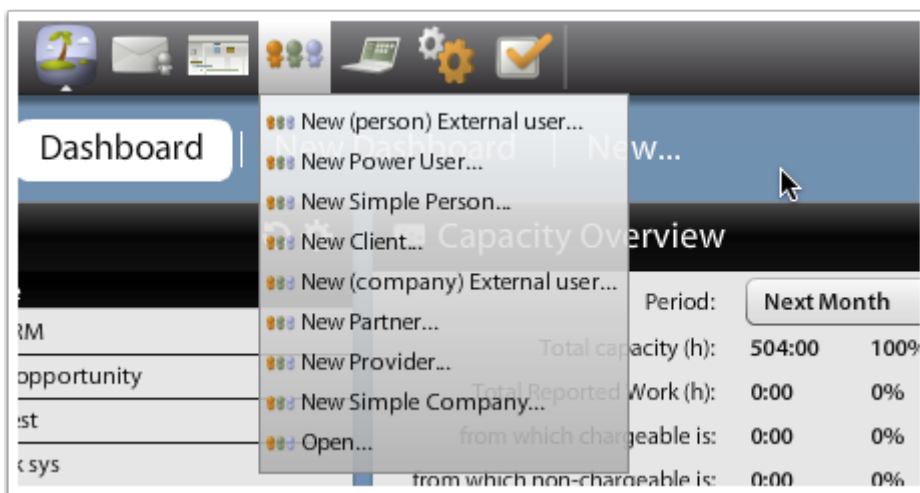
Create new group Create new group category Delete

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

Name	1 ▲
External John	
Favourite Client	
Firma ABC	
Firma a.s.	
First Czech Advisors, k.s.	
Flekacek Frana	
Ford Joseph	

- 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

