

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: Jiráskova 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

Buttons: Copy..., Remove, 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

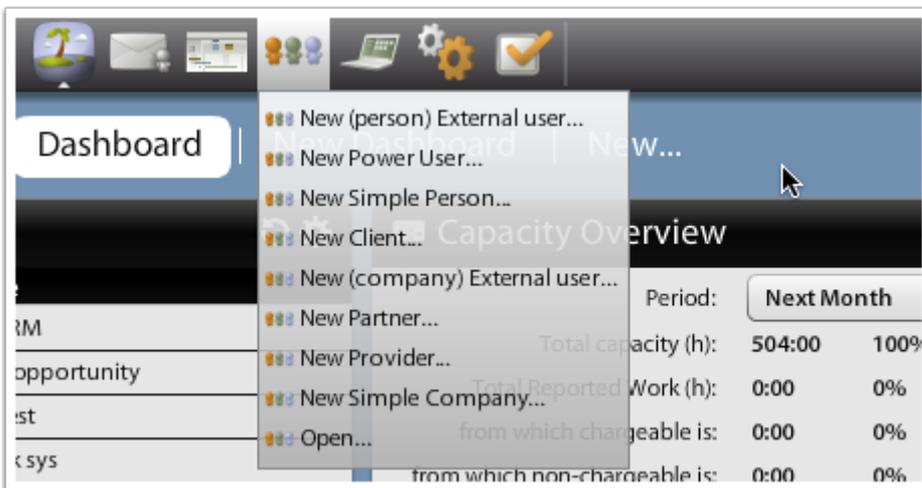
Buttons: Create new group, Create new group category, Delete

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

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

The screenshot shows a user profile for 'Testing Applicant' (Uchazeč) with the status 'Aktivní'. The profile includes contact information (ID: 222300999, 799888999, email: jana@testing.com) and address (První přespólní 12000, Praha 2, Hlavní město Praha, Czech Republic). A navigation bar contains icons for Profile, Employment history, Applicant detail, Skills, Education, Languages, and Locations. The main content area is expanded to show 'Employment history' with entries for 'Former Employer Co. Ltd.: TOP manažer (Finanční oddělení)', 'Atollon Limited', and 'Náš první partner: Asistent (Fakturace)'. Other sections include 'Applicant detail' (Salary: 0, Actual job: Former Employer Co. Ltd., Finanční oddělení, TOP manažer (-)), 'Skills' (Computer skills, Driving licenses, Managerial skills, Personal skills), 'Education' (Certification, MSCE, Master's Degree or Equivalent, Master of Public Administration (MPA), ---, 0), 'Languages' (Czech: Native language, Very well, Average; English: Advanced), and '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

Updated 25 March 2020 17:12:58 by Jan Safka