

Atollon 2017

Innovations

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Atollon Innovations 2017

(week 35)

Notice: After upgrade, you may find out that some Tabs in New Finder are missing. In such case, you may easily add them back and change their sort order using **Context Settings > Layout**.

New Features

- New Finder - best tool to manage & store your company data about clients and projects has been completely rewritten

The screenshot displays the Bohemia Accounting s.r.o. software interface. On the left, a sidebar lists several clients, each with a red icon and a count. The client 'Bohemia Accounting s.r.o.' is highlighted in blue. The main area on the right shows the details for this client, including a header with the company name and address, a toolbar with icons for various functions, and a table of data. The table has columns for 'All', 'Status', 'Number', 'Supplier', and 'Cust'. The data rows include 'CRM System', 'Other', 'Project', 'Project A', and 'SO: Test'.

All	Status	Number	Supplier	Cust
CRM System	Sales opportunity (SO150039)	INV140028	Your Organization	Bohemia
	03/05/2015	INV140013	Your Organization	Bohemia
		INV130013	Super Co.	Bohemia
		INV130014	Best Provider	Bohemia
Other	Other			
	12/30/2013			
Project	Project_hiring (PN130009)			
	12/30/2013			
Project A	Project A			
	12/10/2014			
SO: Test	Sales opportunity (SO130004)			
	12/30/2013			

- Timeline - new tool that is going to track any change that happens to contexts (clients, projects, etc.), first version track communication, we will also step-by-step add new tools

123 GASTRO s.r.o.
Client (ODR0031)
07/20/2017

123 GASTRO s.r.o.
Client (ODR0040)
08/03/2017

123 TEST3000
Client (ref)
12/29/2014

123 TEST3000
Client (ODR0033)
07/21/2017

AAAA3K, s.r.o.
Client (ODR0028)
07/20/2017

AAA AGENT CZ s.r.o.
Client (ODR0026)
07/11/2017

AAA - AIRBRUSN STUDIO
Client (ODR0032)
07/20/2017

AAA AUTO a.s.
Client (ODR0037)
08/02/2017

AAA AUTO a.s.
Client (ref112233)
12/30/2013

AAA TECHNIK s.r.o.
Client
02/25/2016

123 GASTRO s.r.o.
Client (ODR0031)
aaaaaaa
111111111
987654222
abx@asd.aa

Praha 6
Hlavní město Praha
Czech Republic (Ceska Republika)

Timeline

New Comment
Write your new comment here...

August 2017
Thursday 31th August, 2017 7:15 by Joe Admin

New note from meeting
New note from meeting
this is going to be huge
I like the way we store messages here

Thursday 31th August, 2017 7:15 by Joe Admin

Hello
Hello
another comment here

Wednesday 30th August, 2017 17:19 by Joe Admin

Yupiii
Yupiii

Wednesday 30th August, 2017 15:51 by Joe Admin

Enhancements

- Access - New ACL detail window now improved - path to tree node displayed
- Communication - New quick notice on context added

Bohemia Accounting s.r.o.

Client

Bryksova 762/44
19800, Praha
CZ

Communication

Create new E-mail Reply Reply all Forward Convert to request Move Delete

Send notification

Eva Lucy

Subject:
Recipients:
Date:

S..	S..	Type	Subject	A..	From	For	Date	1
☆	★	Notice	New meeting notes from Thurs...	Admin	Joe		Today 7:07 AM	
☆		Invoic	Invoice INV140028 is waiting fo...	Admin	Joe		04/29/2016 6:12 PM	
☆		Invoic	Invoice INV140028 is waiting fo...	Admin	Joe		04/29/2016 6:12 PM	
☆		Invoic	Invoice INV140028 is waiting fo...	Admin	Joe		04/29/2016 6:12 PM	

- Communication - Quick delegation of incoming e-mail to colleague

05/19/2015 1:45 PM

05/19/2015 11:46 AM

05/19/2015 11:43 AM

05/19/2015 11:41 AM

05/15/2015 3:42 PM

05/15/2015 3:33 PM

05/15/2015 3:29 PM

05/15/2015 2:56 PM

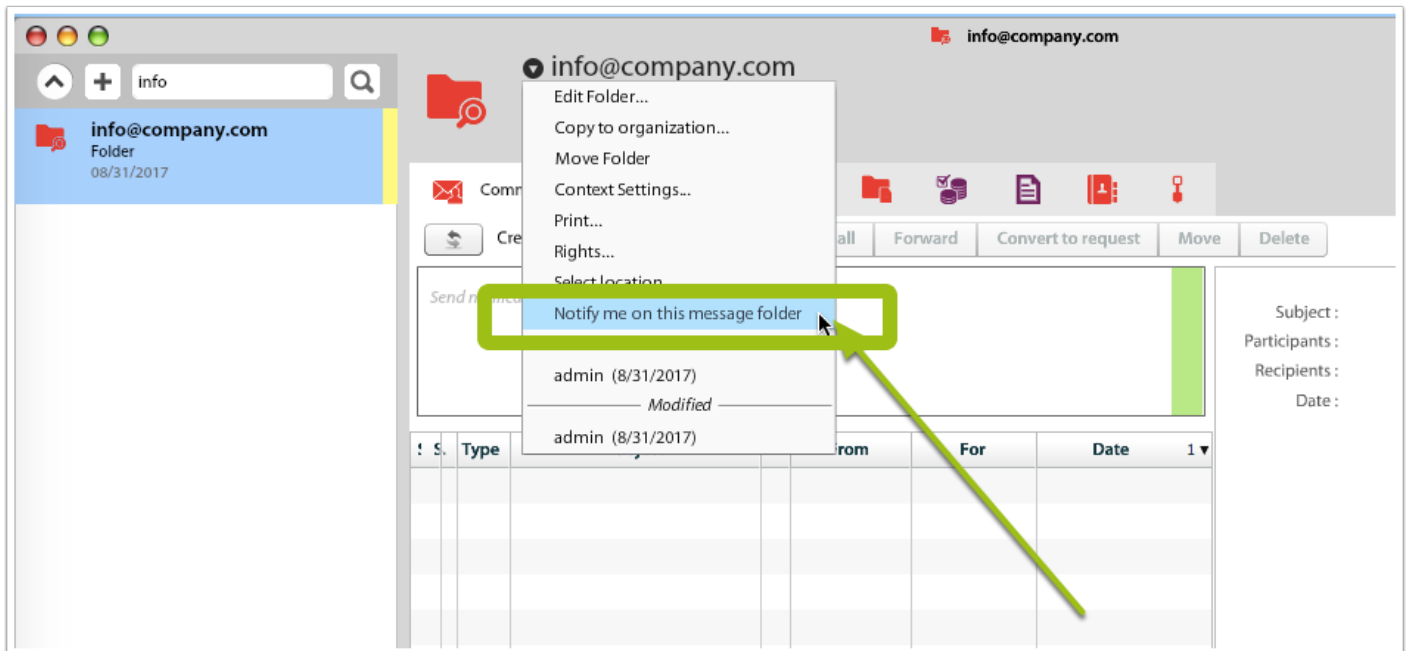
05/15/2015 2:54 PM

05/15/2015 2:01 PM

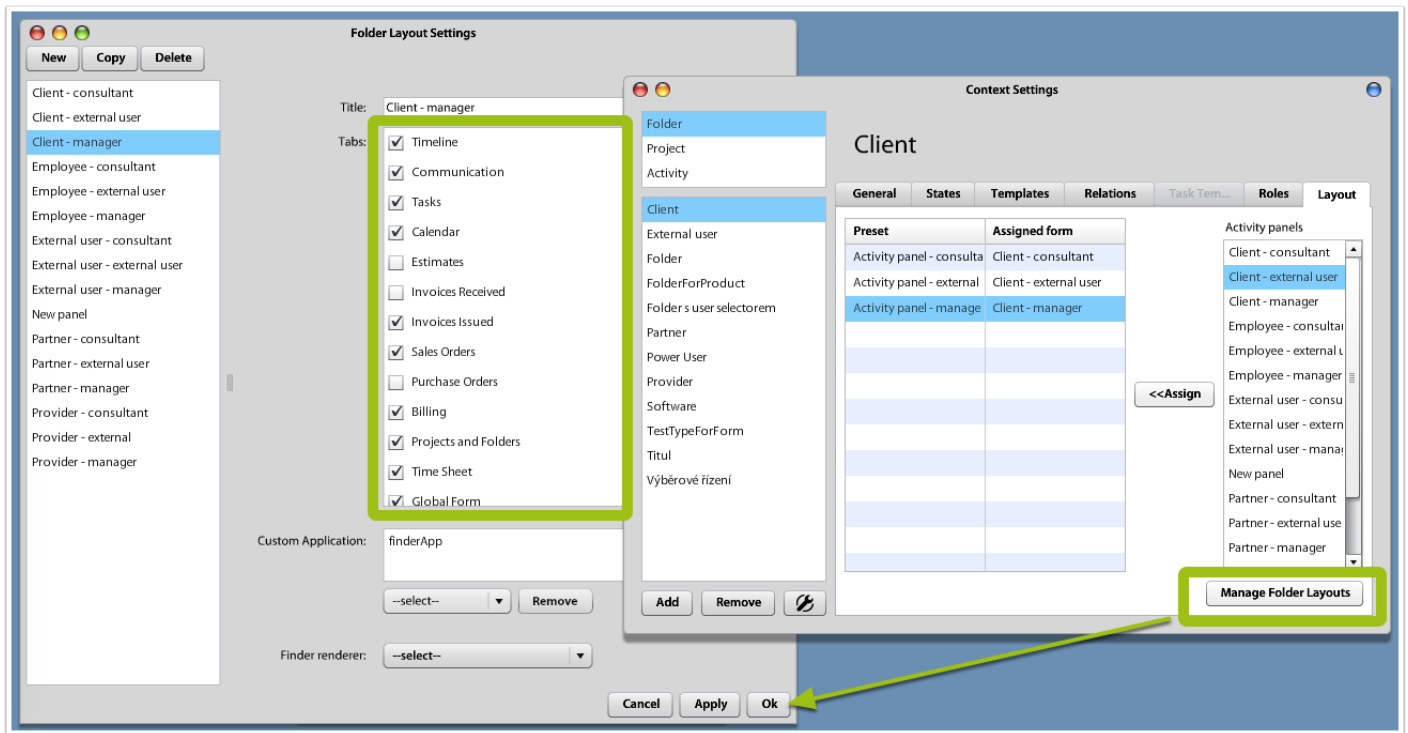
Move to context...

Send notification

- Communication - shared mailboxes (eg. info@company.com) now available from User's communication tool



- Finder - Configuration of tabs now available directly from Context Settings > Layout



- Finder - Only appropriate tabs now displayed for selected type of folder
- Finder - New way of setting folder types
- Finder - Now you can fully customize what tabs are displayed and what tab will be on 1st position
- General - Organization Settings added
- General - localization added to Language names
- Project - New Project Wizard - simplified, Next/Back steps removed
- Project - New Project Wizard - great improvement of adding / selecting new company, using combination of internal database, external database or manual contact entry

Creating: Project (Contact information)

Project

☒ Business
☐ Individual

Company Name: Deal

Reg. No.:
VAT No.:
Web:
Primary Industry:
Comment:

Correspondence Delivery Invoicing

Street:
Zip:
City:
Region:
Country:

☐ Existing Contact
☒ New Contact

Prefix First name Surname Middle name Suffix

Phone is primary:
Mobile is primary:
EEE is primary:

- Recruitment - applicant import requests (CV Inbox) does not delete temporary files, it rather archives them
- Recruitment - maximum number of hired people improved on Vacancy requirements detail
- Report - New fields for master/slave project responsible users added
- Sidebar - It is possible to set-up that the sidebar remains closed

Bug Fixes

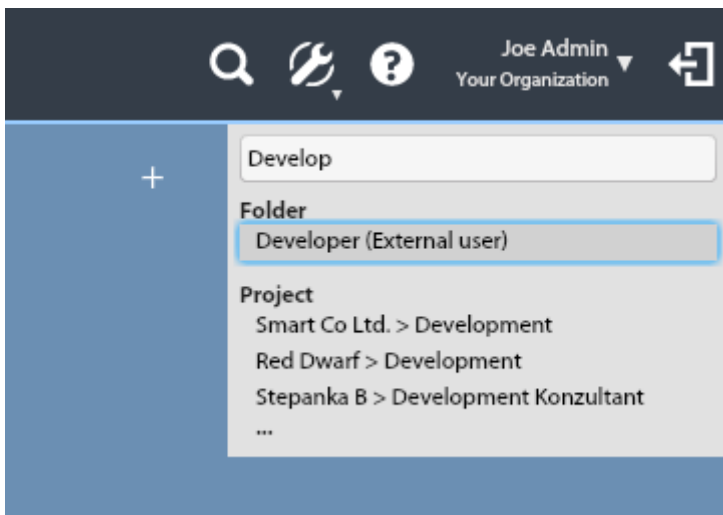
- Communication - new e-mail notification will not interrupt New message composition
- Invoice - problem with refresh of Value authorized fixed

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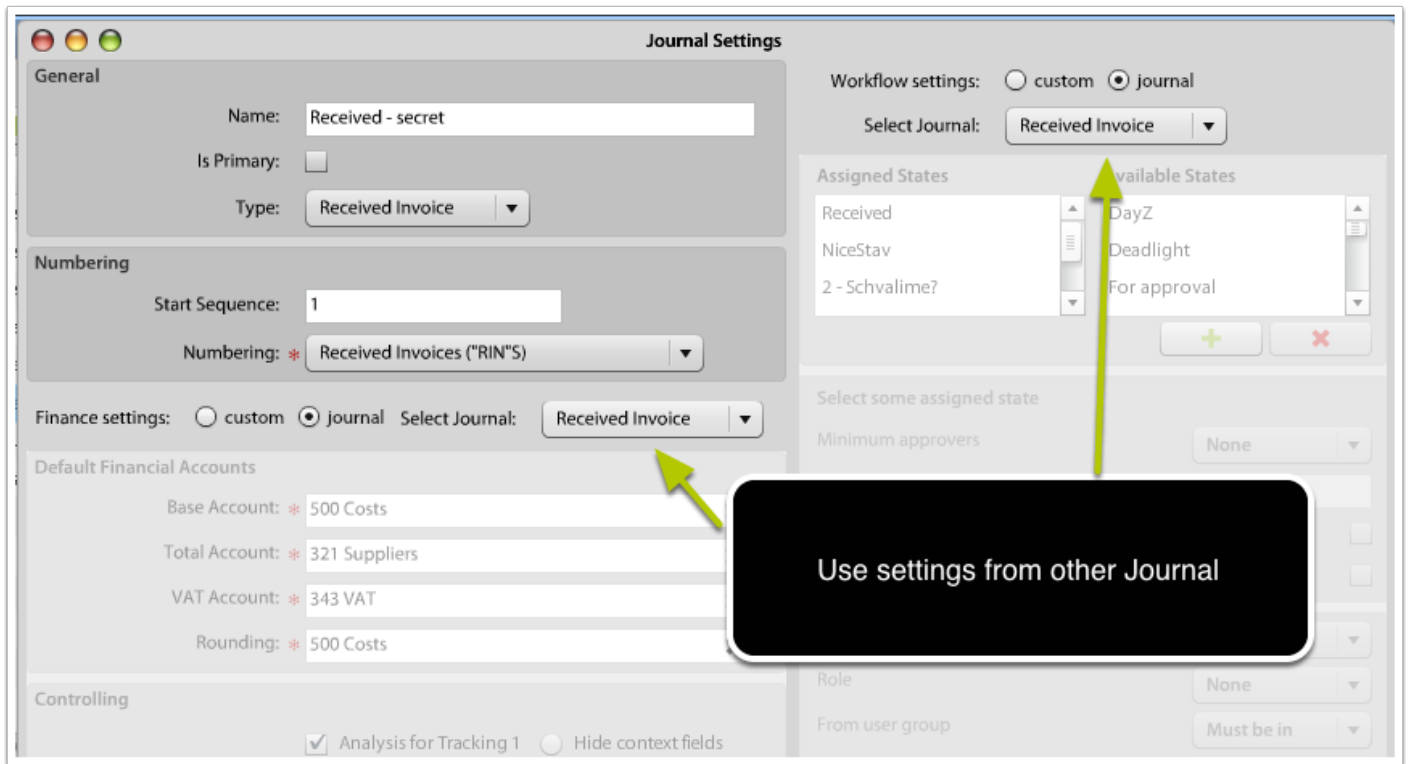
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New Features

- Custom Application: New module allowing us to design and deploy brand new application without coding (consultants or advanced users may set-up own application or database)
- Finder: New fulltext search through context (folders, projects, activities and their ref. numbers) in main search tool (you can also try Ctrl+F and Cmd+F)



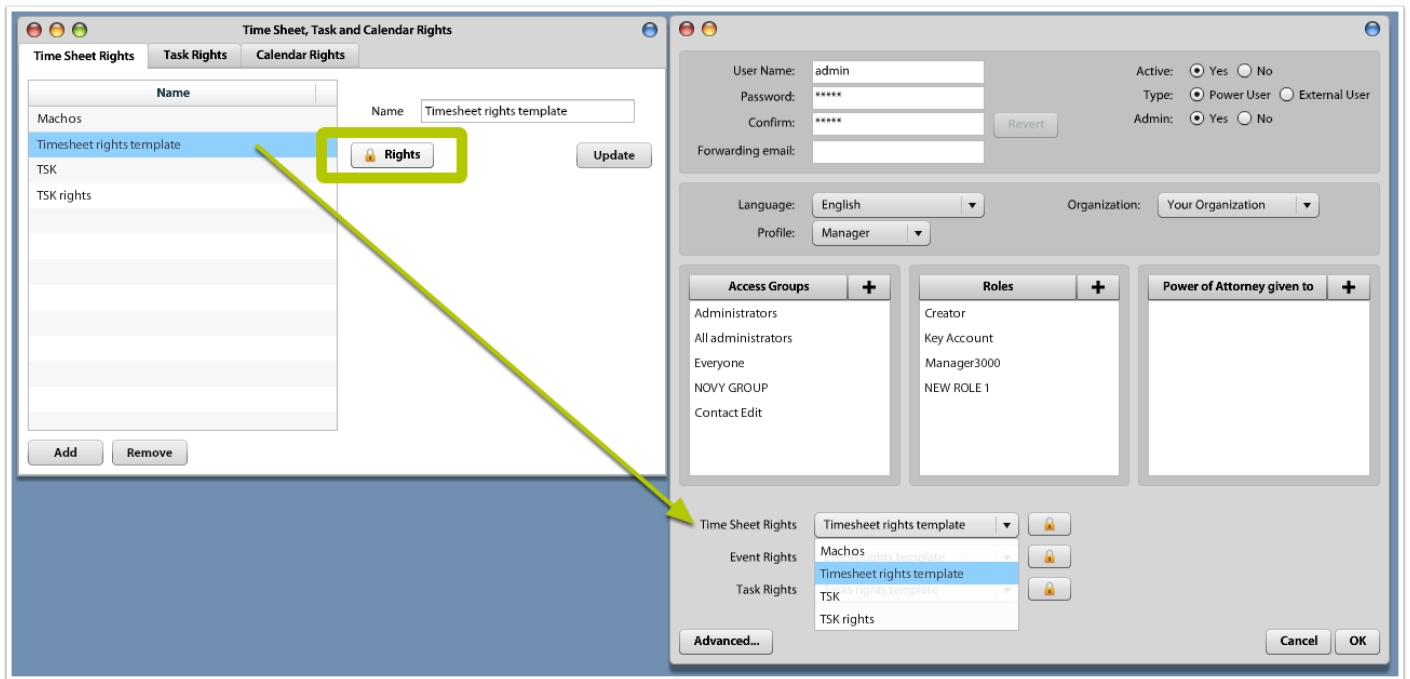
- Finance: Journal Setting may now inherit Finance Settings, Approval Workflow or Custom Fields settings from other Journal (useful when plenty of similar Journals have to be set-up)



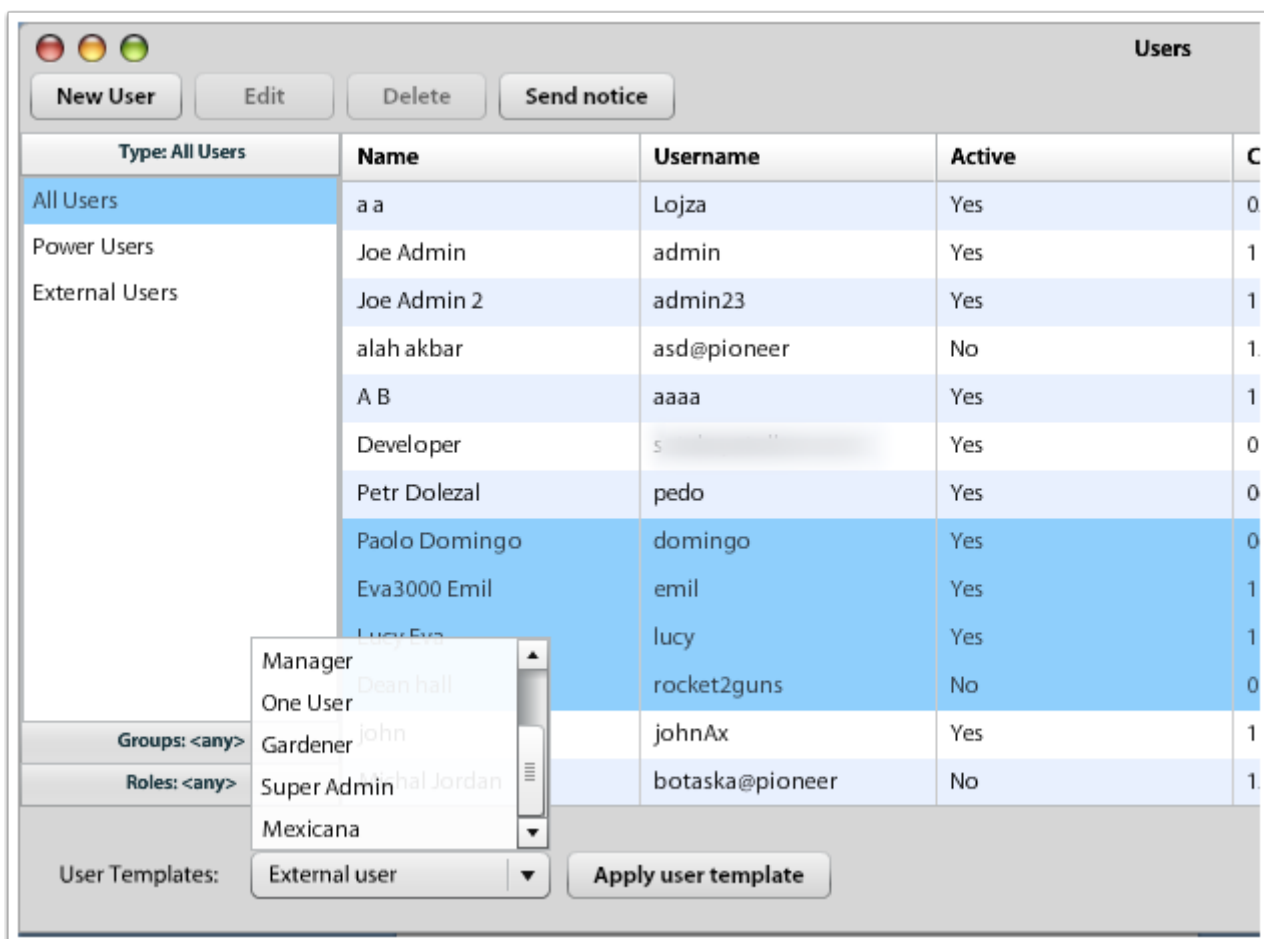
- Mail: New application to set-up Mailbox settings (add new / edit existing mailbox)
- Marketing: It is now possible to assign tracking code to your Partners to report and track affiliate programs (in relation to acquiring new clients or projects)
- Recruitment: It is possible to automatically import responses from Jobs.cz
- Workflow: It is possible to create workflow actions on incoming and outgoing messages (also used for message content filtering, automated e-mail imports, etc.)

Enhancements

- Access: Easier way of modifying access rights to Time Sheet, Calendar and Tasks in teams of users







- Access: Easier way to modify and set-up current user's rights (apply User Template to existing Users)



- Access: Added configuration of access rights in most of the application modules
- Access: Overall performance of access rights settings improved, now new folder is displayed immediately after it's created

- Contact: In multi-organization set-up, better emphasized information about intra-company contact relations


Atollon Limited




Email **sales@atollon.com**
Mobile **7492359925**
Phone **126348346823**
Web **www.atollon.com**

Text
Admin Joe
null


Address **Suite B 29 Harley Street
London
W1G 9QR**

In case of multi-organization view, other organization's relations are emphasized

Your Organization
Partner **Joe Admin** Creator
Current

Employees **Bruno Mars**





- Contact: Multiple contacts may be deleted in one click
- Contact: Indication of system user added (now you can easily filter what contacts are also system users)


Contacts

New Person New Company Update Delete

All contacts
Persons
Companies
System users

Name	1 ▲	Employer	Phone	Mobile	E-m
a a					a@a.cz
Admin Joe		Your Organization			admin@atollon.co
Admin 2 Joe		SPOLČNOST s.r.o.			Email
B A					E-mail
Developer					sotola@atollon.co


Joe Admin




Email **admin@fangtooth.atollon.com**
admin@atollon.com

Address **Jakubská 666
Staré Město
11000**

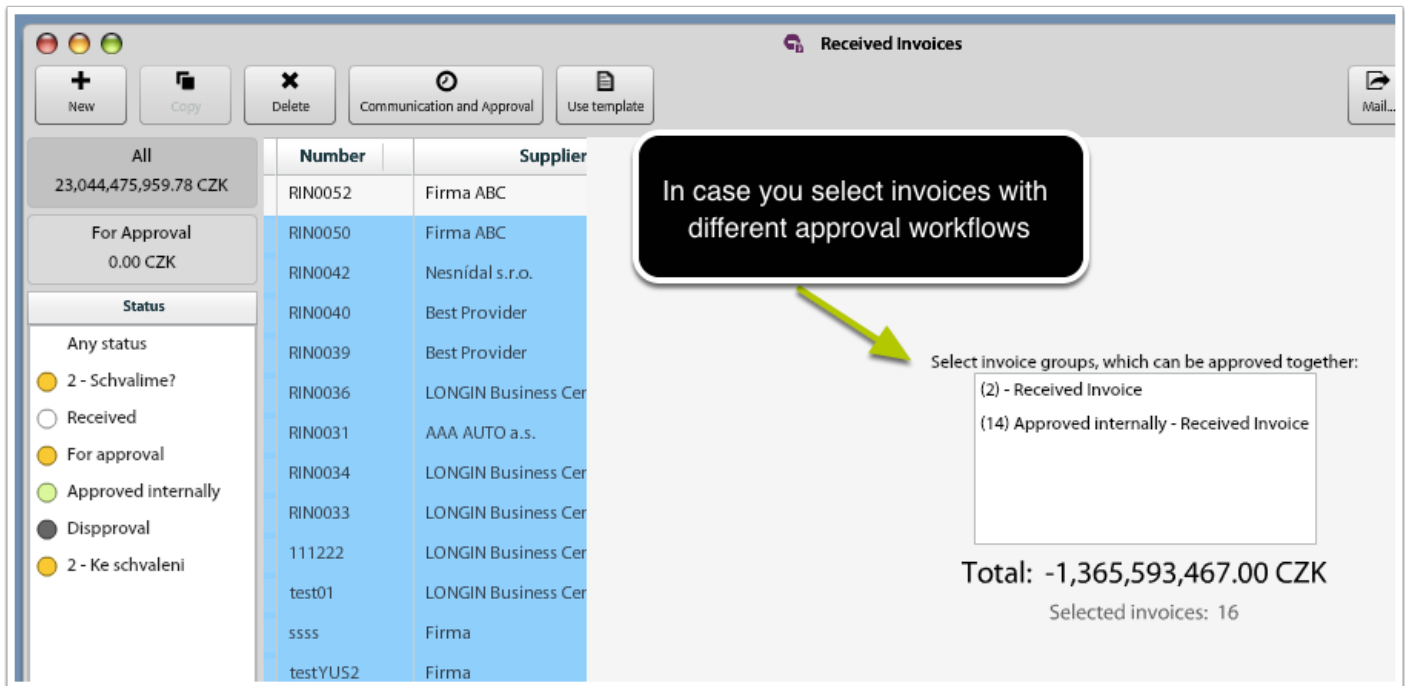
Your Organization
Power User
Client **Joe Admin** Creator
Initial

Text
Admin Joe
null
Popo
Admin Joe
popopo
Popo
Admin Joe
popopo
test 2 dva dva
"Admin Joe" <admin@f
mail test...
test mail
"Admin Joe" <admin@f

- Contact: Improved speed, now Language list gets cached
- Documents: It is possible to rebuild index of documents content in the whole document library (needed in organizations that require full text document search and newer indexing methods applied, some of them added in 2017-02)
- Finder: It is now possible to create new User when creating New Finder Folder
- General: It is no longer necessary to clear browser cache before getting new version of Lagoon
- General: Localization added to Language names
- Invoice: New grid/table developed to enable resizing columns with horizontal scroller (good for smaller displays when more fields are required to be shown)

Supplier	Customer	Last Modified	Project	Due date	Grand Total	Des
	Your Organization	05/11/2017 13:47	DEV01: TEST TS	05/11/2017	576,000.00 CZK	
	Your Organization	05/11/2017 13:46	DEV01: TEST TS	05/11/2017	30,000.00 CZK	
	Your Organization	05/11/2017 13:44	DEV01: TEST TS	05/11/2017	168,000.00 CZK	
	Your Organization	05/11/2017 13:39	DEV01: TEST TS	05/11/2017	36,000.00 CZK	
ness Center, a.s.	Your Organization	04/07/2017 12:44	Project	04/07/2017	0.00 CZK	
ness Center, a.s.	Your Organization	06/06/2017 10:04	Project	04/05/2017	2,487.28 CZK	
ness Center, a.s.	Your Organization	06/06/2017 10:04	Project	03/31/2017	1,210.00 CZK	
	Your Organization	06/06/2017 10:04		03/31/2017	1,210.00 CZK	
	Your Organization	06/13/2017 06:06	DEV01: TEST TS	03/20/2017	120.00 CZK	
	Your Organization	06/13/2017 06:06	DEV01: TEST TS	03/20/2017	1,210.00 CZK	
	Your Organization	06/13/2017 06:06	DEV01: TEST TS	03/31/2017	2,487.28 CZK	
subfolder	Your Organization	02/24/2017 18:00	Service	02/21/2017	3,720.00 CZK	
subfolder	Your Organization	02/20/2017 16:20	Service	02/20/2017	1,320.00 CZK	
	Your Organization	02/02/2017 14:08	Project	02/14/2017	45,000.00 CZK	

- Invoice: Multi-approval - it is now possible to approve several invoices at the same time (incl. checking all conditions on invoices with various approval rules, required PIN codes, custom fields, etc.), it is also possible to mass-assign next approver



- Invoice: Invoice history was streamlined to show just the important updates
- Mail: It is now possible to select different target mailbox for storing incoming e-mails (ie info, helpdesk e-mails can be stored in shared folder etc.)
- Recruitment: After importing new CV (from all sources - web, job portals, cv parsing, linked-in, etc.) the import file is archived (not deleted)
- Recruitment: Language and language level is now exported in Job Advertisement (applicant profile's requirements), if needed
- Recruitment: Name of the position is now localized
- Recruitment: ZIP codes added into Job Advertisement
- Recruitment: Searching applicants now searches by value of the skill grade, or lang level
- Recruitment: Job Advertisement - now it's possible to copy Advertisement from any other advertisement / Vacancy
- Reporting: It is possible to report for organization dimensions (Tracking Categories - cost centres, etc.)
- Reporting: Added missing fields into invoice reporting that relate to approval process
- Reporting: It is now possible to open Invoice detail from the report results
- Task: New fixed status added (Will not complete) - it is just another way to look at non-completed tasks that will never be completed
- Task: It is possible to set-up (per Type of Work) that the attachment is required
- Time Sheet: New reporting fields Billed total and Billed time added to more accurately measure what time sheet entries have actually entered into the Invoice

Bug Fixes

- Invoice: Reprogrammed the way invoice transactions and controlling variables are calculated, fixing several smaller cosmetic issues
- Invoice: OCR - invoice recognition upload extended - now several documents may be uploaded for invoice recognition and processing at a time

- General: Font smooting on many components in new Lagoon generation

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(week 15)

Major update

- New generation client side framework
 - This update contains migration to new development framework that brings more than just better visual expressions, but also possibility to run the application outside browser as a stand-alone application, future versions should also bring support for mobile and tablet devices, such as iPad and Android tablets (Windows 10 tablets are supported already). New stand-alone Atollon Lagoon should also provide several improvements, incl. better HTML support in e-mails, more comfortable file handling, etc.

New Features

- Access: New access rights inheritance developed for higher flexibility of access rights settings
- Contacts: Added communication history to contact detail
- Recruitment: New Job/Vacancy Promotion Tool
- Recruitment: New XML Feed for Vacancy Promotion
- Recruitment: New API for Applicant import from online tools
- Reporting: Added new reports on management finance / transaction controlling
- Workflow: New server side add-ons with workflow support (enable custom apps on Atollon server)

Enhancements

- Access: Added configuration of access rights to missing parts of modules
- Billing: Improved billing view (custom columns, etc.)
- Contact: Copy contact details to clipboard function added
- Contact: Contact detail completely reworked and improved
- Contact: Added full support for domestic + foreign bank account information
- Forms: Added new components: Document link and User link (add document or user reference to your custom forms, incl. reporting support)
- Invoice: Changed rounding of Received Invoices to 2-decimals

- Invoice: Added support for domestic + foreign bank account information
- Invoice: Approval process with manual selection of any number of approvers
- Invoice: Invoice filters saved automatically
- Invoice: Added payment reference field into invoice header
- Invoice: Filter invoices by approvers
- Invoice: Show history of changes in invoice header's custom fields
- Invoice: Show history of attachments changes
- Invoice: Several improvements in OCR functionality
- Invoice: When rejecting invoice, comment is required
- Invoice: Require unique approvers in multi-step invoice approval process
- Invoice: Approval process now supports restraints (only partial value of invoice can be approved)
- Invoice: It's possible to change transaction owner now
- Recruitment: Added submit & open button to streamline user flow
- Recruitment: Filtering for users responsible for CV import, possibility to change the user(s)
- Recruitment: Several tweaks of GUI on Applicant profile
- Recruitment: Drag & drop CVs from e-mail to CV parsing tool
- Recruitment: CV Inbox now support importing applicant locations
- Reporting: Added transactions and dimensions into management finance reporting
- Time Sheet: Save new entry by pressing Ctrl + Enter (or Cmd + Enter on Apple)

Bug Fixes

- Invoice: Fixed several issues with VAT selection and calculation
- Invoice: Recalculation of To be paid value on invoice header
- Invoice: Fixed displaying several attachments
- Invoice: Changed the way of OCR document confirmation
- Recruitment: Several fixes for CV Inbox Applicant import tool
- Time Sheet: Correct type of work selection fixed