

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 clients with their names, IDs, and dates. The client 'Bohemia Accounting s.r.o.' is selected, showing a count of 5. The main area shows a detailed view of the selected client, including a list of projects and a table of invoices.

Client List (Left Sidebar):

- Client (ODR0006) 01/28/2017
- Automobiland EU, s.r.o. Client (ODR0015) 04/28/2017
- Automot Bohemia, s.r.o. Client 12/30/2013 4
- Bohemia Accounting s.r.o. Client 12/30/2013 5**
- Bookaroom s.r.o. Client (ODR0007) 01/28/2017
- Caracas City s.r.o. Client (ODR0008) 01/28/2017 1
- CCConsulting s.r.o. Client (ODR0029) 07/20/2017
- ČESAD Počátky, s.r.o. Client (ODR0035) 07/21/2017
- Česká abilympijská asociace, z.s. Client (ODR0034) 07/21/2017

Client Details (Right Panel):

Bohemia Accounting s.r.o.
Client
Bryksova 762/44
19800, Praha
CZ

Actions: New, Copy, Delete, Communication and Approval, Use template

Projects:

- CRM System Sales opportunity (SO150039) 03/05/2015
- Other Other 12/30/2013
- Project Project_hiring (PN130009) 12/30/2013 18
- Project A Project A 12/10/2014
- SO: Test Sales opportunity (SO130004) 12/30/2013

Invoices Table:

Number	Supplier	Cust
INV140028	Your Organization	Bohemia
INV140013	Your Organization	Bohemia
INV130013	Super Co.	Bohemia
INV130014	Best Provider	Bohemia

- 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

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	

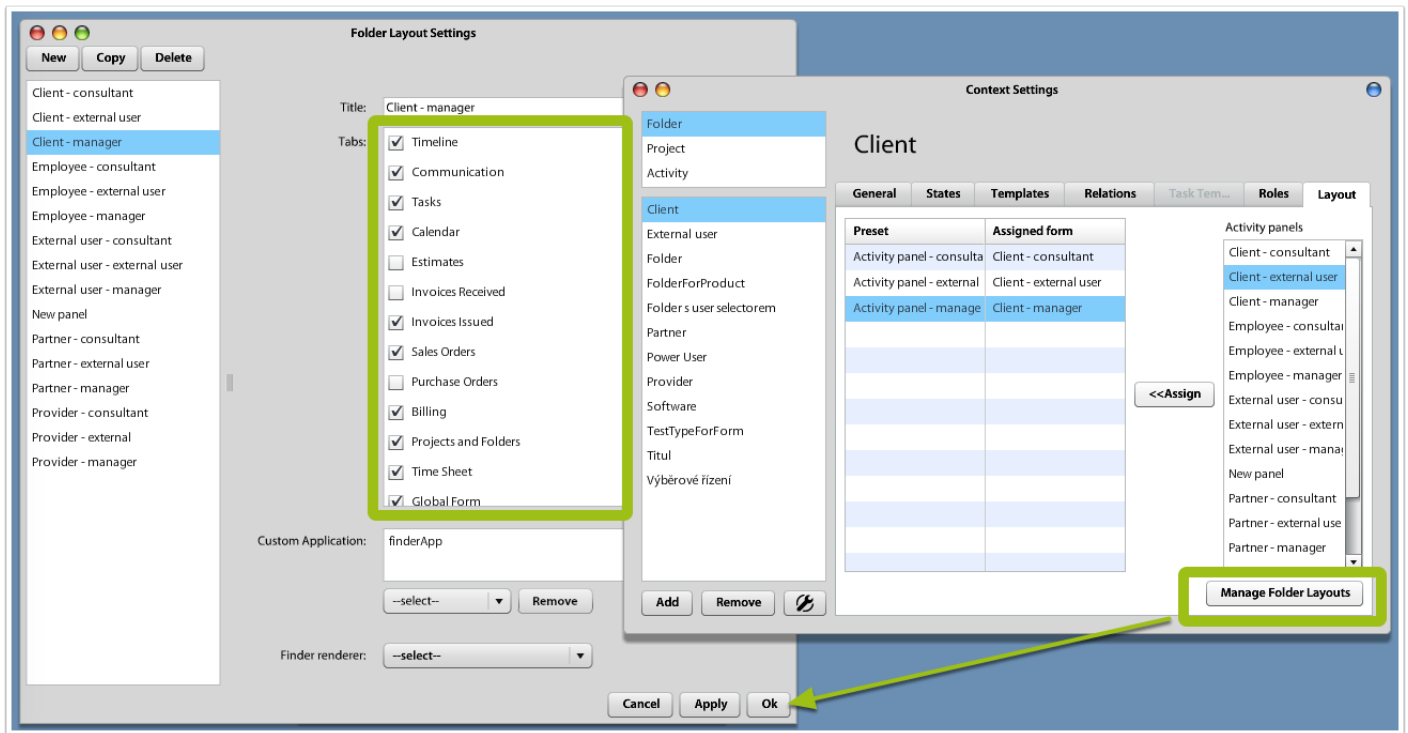
Subject :
Recipients :
Date :

- 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

Send notification

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



- 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

Revision #1

Created 25 March 2020 16:06:52 by Jan Safka

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