

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 ODR 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 contact information and a toolbar with options like 'New', 'Copy', 'Delete', 'Communication and Approval', and 'Use template'. Below this, a table displays project and invoice data.

All	Status	Number	Supplier	Custu
CRM System				
Sales opportunity (SO150039)		INV140028	Your Organization	Bohemia
		INV140013	Your Organization	Bohemia
		INV130013	Super Co.	Bohemia
		INV130014	Best Provider	Bohemia
Other				
Other				
Project				
Project_hiring (PN130009)	18			
Project A				
Project A				
SO: Test				
Sales opportunity (SO130004)				

- 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

The screenshot displays a CRM application interface. On the left is a sidebar with a list of clients, each with a red icon, name, client ID, and a count. The main area shows the details for '123 GASTRO s.r.o.', including contact information and a timeline of events. A 'New Comment' section is also visible.

Client Name	Client ID	Count
123 GASTRO s.r.o.	Client (ODR0031)	3
123 GASTRO s.r.o.	Client (ODR0040)	7
123 TEST3000	Client (ref)	136
123 TEST3000	Client (ODR0033)	
AAAA3K, s.r.o.	Client (ODR0028)	2
AAA AGENT CZ s.r.o.	Client (ODR0026)	
AAA - AIRBRUSN STUDIO	Client (ODR0032)	
AAA AUTO a.s.	Client (ODR0037)	
AAA AUTO a.s.	Client (ref112233)	15
AAA TECHNIK s.r.o.	Client	4

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

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 :

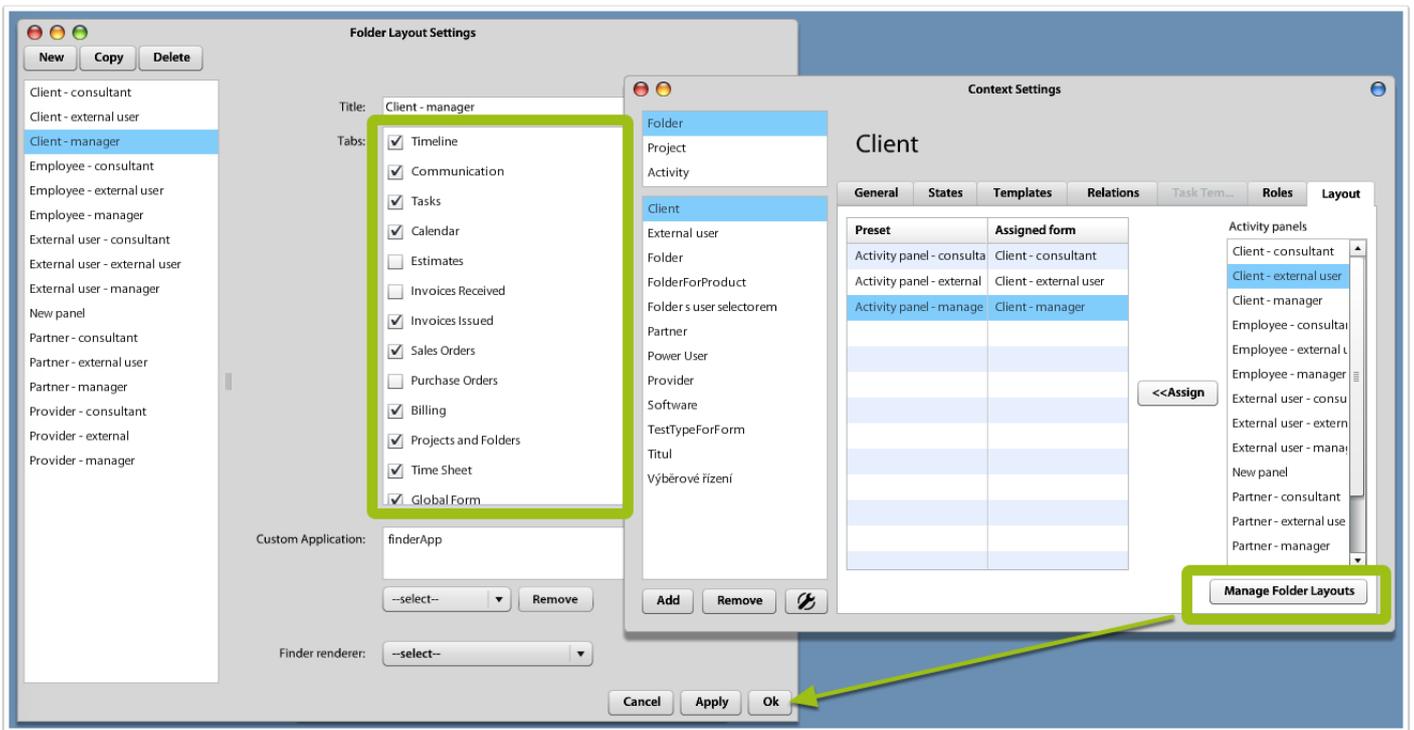
- Communication - Quick delegation of incoming e-mail to colleague

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

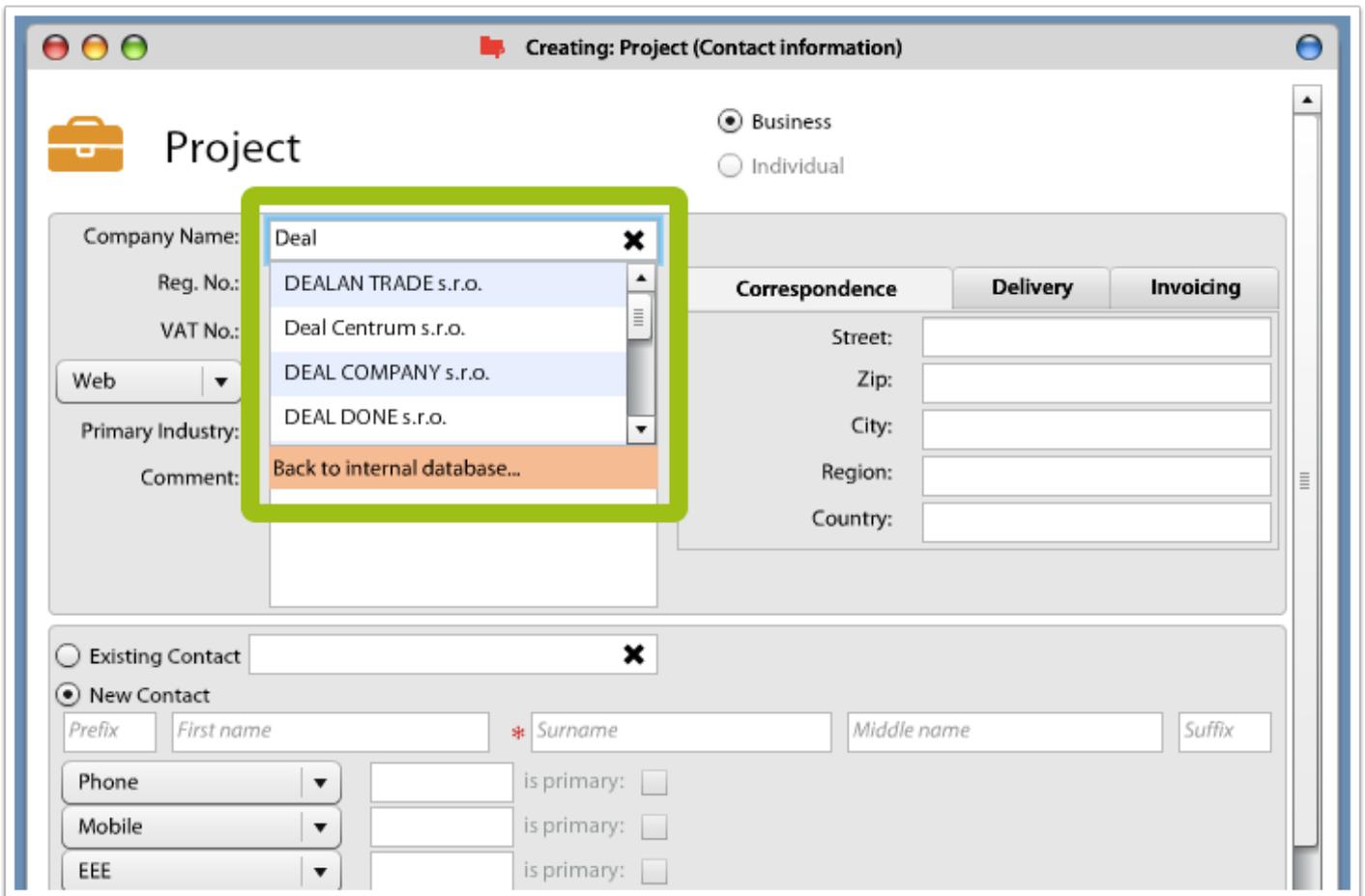
Move to context...

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



- 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

Updated 25 March 2020 16:10:45 by Jan Safka