

Atollon Innovations 2021 (week 22)

New Features

Deals

- New application view for **tracking sales activity**, includes (above other improvements) clear indication about **next step** or **marketing activity** in your sales progress



Icon	Deal #	Client	Deal name	Status	Owner	Last modified
🚫	malso	Malév Zrt.	Product X Sales	Proposal	deletedUser	
⚠️	passo	Pascal	Product Y Sales	Enquiry	deletedUser	
✅	todso	Today Software a.s.	Opportunity for delivery	Won	deletedUser	
✅	schso	Schloss GMBh.	Product Z Sales	Lost	deletedUser	

E-mail and print templates

- It is possible to **setup custom print templates** or **documents** to be generated based on context type (client, project, activity) or based on invoice journal (estimate, orders, invoices, etc.)
- New generic document printouts are **localised** into several languages - output of estimate, invoice, etc. can be generated in language of the recipient
- Each **document template may have own e-mail template**, if needed when sending the document electronically

Print templates

- Default
- System default
- Draft contract amendment - GDPR**

Print | Send | Save | Other

2021 CZK 26,599

Deal Summary

Marketing Channel: --select--

Cancel OK

New Comment

Write your new comment here...

New document generation tool... allows you to send documents on one click ...

Name: Opportunity for de... Ref. Id... New status: Won

Enhancements

Calendar

- Set first day of the week to Monday (currently it was just Sunday)

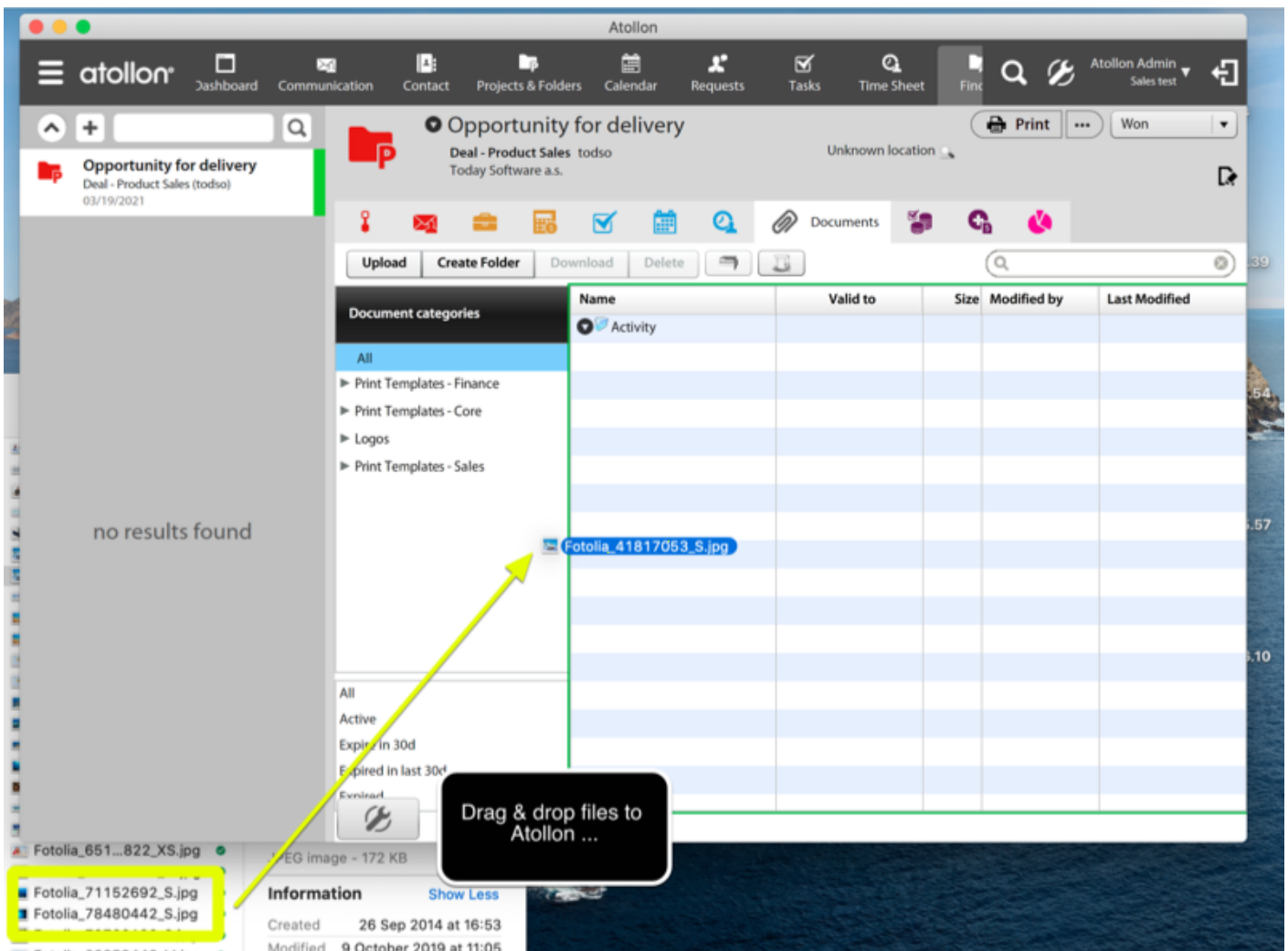
Documents

- It is possible to **send document by e-mail** directly from document library. This applies to both regular documents and images in Gallery

The screenshot shows the Atollon CRM interface. The top navigation bar includes 'atollon', 'shboard', 'Communication', 'Contact', 'Projects & Folders', 'Calendar', 'Requests', 'Tasks', 'Time Sheet', 'Finder', and 'Deals'. The main header displays 'Opportunity for delivery' with sub-headers 'Deal - Product Sales (todso)' and 'Today Software a.s.'. A 'Documents' tab is active, showing a table of documents. A context menu is open over the document 'Fotolia_41817053_S.jpg', with the 'Send document' option highlighted in yellow. A callout box points to this option with the text 'Send document(s) from Atollon (by e-mail)'. The table has columns for 'Name', 'Valid to', 'Size', 'Modified', and 'Last'. The document details on the right include 'Document name: Fotolia_41817053_S.jpg', 'Internal number:', 'Description:', 'Type:', 'Category:', 'Location:', and 'Context: Today Software a.s. > Opportunity for delivery'. A 'Create Issue' button is visible at the bottom right of the document details panel.

Document categories	Name	Valid to	Size	Modified	Last
All	Activity				
	Fotolia_41817053_S.jpg	06/21/2021	168	Atollon A	06/2

- It is possible to **Drag & Drop document into document library** from your desktop
- It is also possible to **move documents by mouse** between folders and contexts



E-mail

- It is possible to **drag & drop attachments to e-mail** not just from your desktop, but also from your Atollon document library
- It is possible to **Empty trash** by one mouse click only
- It is possible to delete mailboxes now (previously they could just be disabled)

Forms

- Now it is possible to load data into custom form - ie load address of selected client contact within custom form

General

- New application installer - it checks for new versions and **upgrades automatically**, no need to ask your IT admin any more.
- **Faster application load** - we improved speed by about 10 seconds (now login should load within 6 - 8 seconds)

Invoice

- Show related documents (advance payment invoices) among invoice payments
- Improved **visibility of To be paid value** on invoices
- It is possible to generate invoice number from project

Products

- Improved layout of billing request detail
- Product types are now sorted by alphabet

Projects

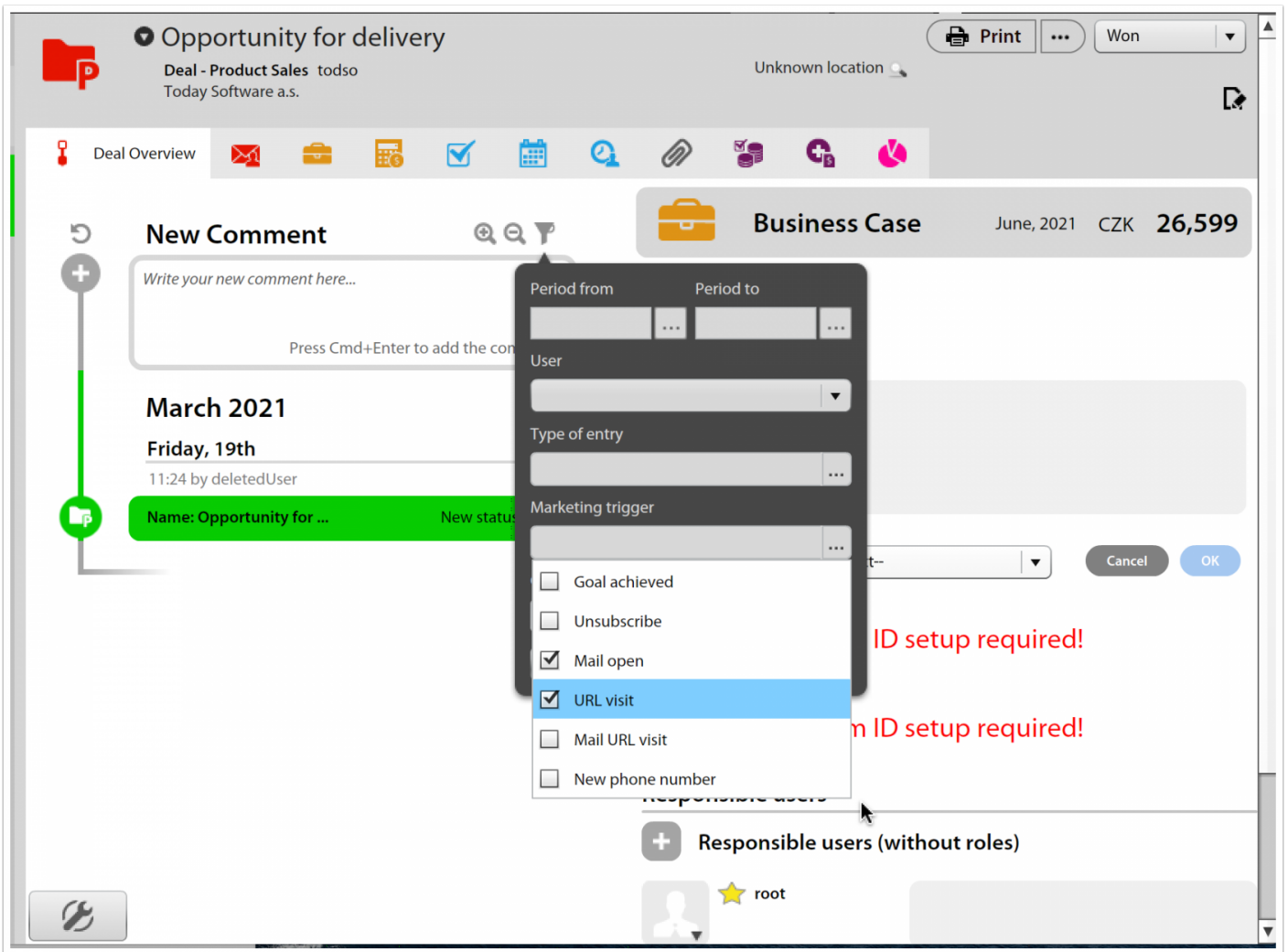
- When changing project type, it is possible to change or add project number now
- When listing projects and folders, created and modified date and time are available

Service Activities

- It is possible now to Save & open the activity at the same time (try also using **Shift+Enter** on **Save** button)

Timeline

- Added refresh on context-based timeline view
- Added **filtering and displaying marketing triggers**



Timer Services

- Now some services must be configured to run automatically (incl. Billing generation)

Bug Fixes

Access

- New Group / Role has proper rights setup (no need to configure their rights manually)

Billing, finance

- Fixed nasty bug when tracking categories (dimensions & user teams) were not loaded properly

Calendar

- Fixed week numbers

Communication

- Fixed icons in full-size messages list mode
- Show message preview both side / bottom fixed
- Allowed sorting message templates

Documents

- Fixed full-text search results in desktop app
- Fixed documents indexing for fulltext search (PDF)

Finder

- Create or update Folder now does not add unnecessary NULL into refId or description fields

Invoice

- Invoice attachments now inherit rights from invoice itself (not from context, where invoice is placed)
- Fine-tuning invoice document (PDF) preview

Product Administration

- Selecting codebooks in product types configuration improved

Recruitment

- Save contact data before profile updates - may fix issues when relationships to employers may get lost
- Fixes in Jobfield / Position component on Applicant detail
- It is possible to save skills required on Vacancy now

Reporting

- Fixed mass responsible user changes on projects and folders on top of reports results
- Fixed XLS export from reports (need to reduce no. of characters to 150)
- Expanding first item in reports results fixed (when report results were grouped)

Service Activities

- It is possible to sort service activities collection now

Revision #9

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