

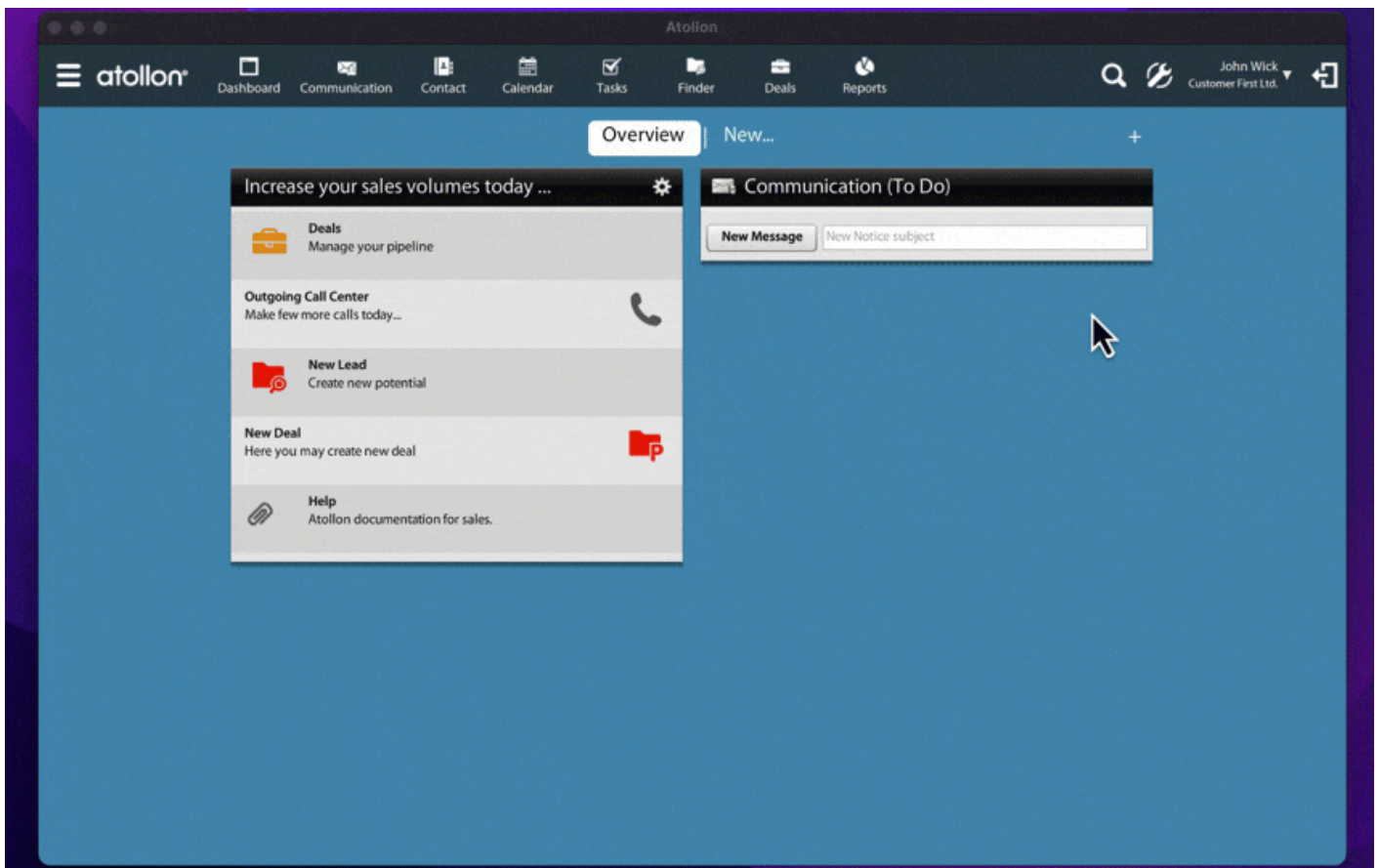
# Atollon Innovations 2022

## (week 49)

## New Features

## User Preferences

- Several features to make user's life with ATOLLON easier added, incl. possibility to set default application that is open after login. You can select any popular app (Communication, Tasks, Time Sheet, Invoices, ...) or you can create new custom app and select it as well (Deals, Service, Technology tracking, etc.)



- Users may setup forwarding e-mail address, where all internal notifications will be sent.

- Users may update their preferred system language without admin's assistance.
- User preferences may be administered by both system administrator and user herself.

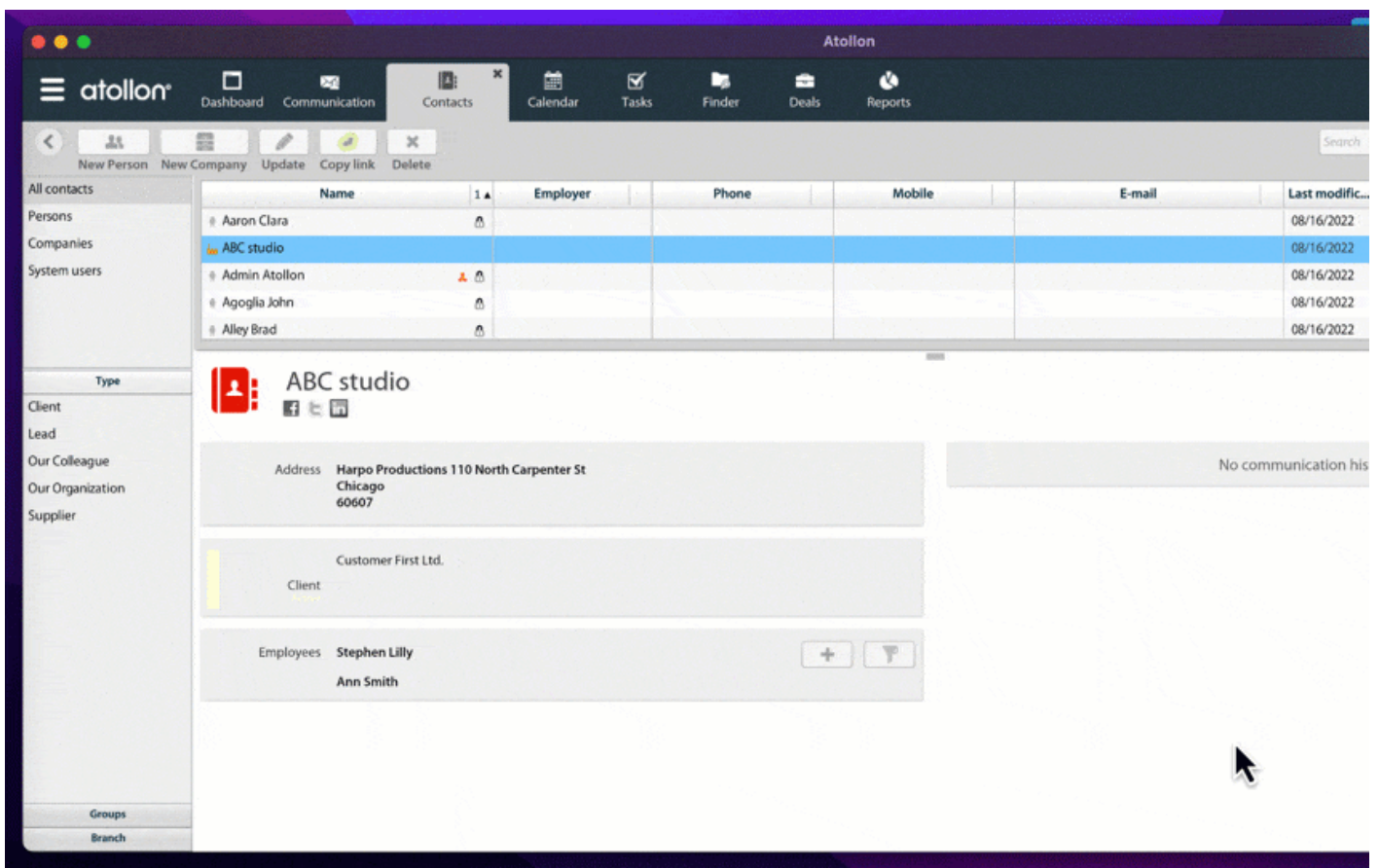
# Enhancements

## Communication

- Using communication by keyboard only improved. Now you can browse messages, delete them using keyboard only. After communication is open, first message is highlighted.

## Contacts

- It is now much easier to add new person to company, incl. contact information or position name.



## Deals, projects

- It is easier now to create new client during new deal or project creation. Until now you had to switch to Finder, now the user workflow is smoother.

The screenshot shows the Atollon CRM interface. The top navigation bar includes icons for Dashboard, Communication, Contact, Calendar, Tasks, Finder, Deals, and Reports. The user is logged in as John Wick, Customer First Ltd. Below the navigation bar is a toolbar with buttons for Refresh, Deal, Add more, Edit, Delete, and Full view. A search bar and Filter/Settings buttons are also present. On the left, there are filters for 'My open records', 'All open records', 'Any Period' (Past, Current month+2, Future), 'All states' (Enquiry, Qualification, Presentation, Proposal, Won), 'All users' (John Wick, Atollon Admin, Mick Barry, Andy Gross, Daniel Ribeira), and 'All types' (Deal). The main table displays a list of deals with columns: Icon, Deal #, Client, Deal name, Status, Owner, Last marketin..., Last contacted, and Deal value. A mouse cursor is pointing at the 'Status' column of the row for 'Apple'.

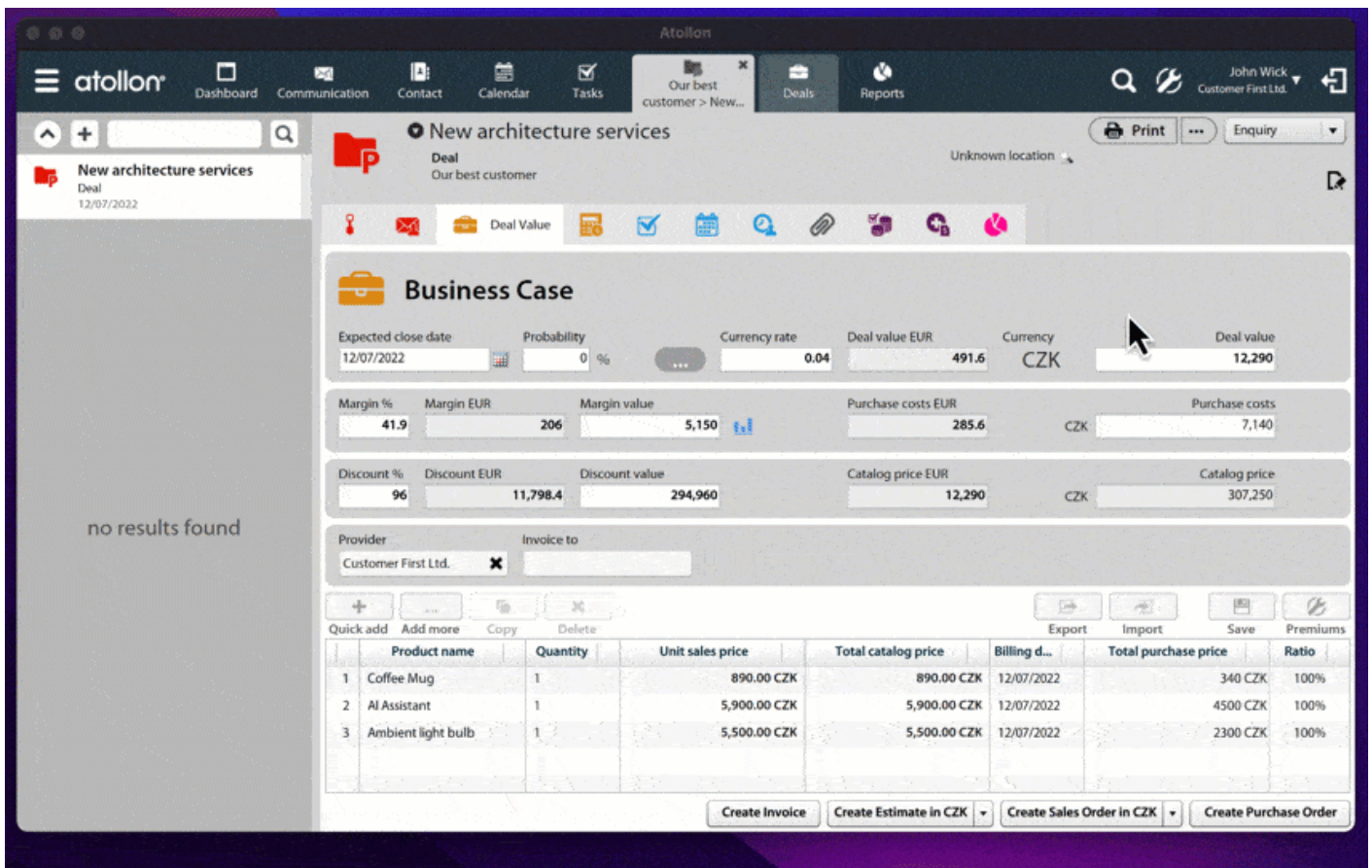
Icon	Deal #	Client	Deal name	Status	Owner	Last marketin...	Last contacted	Deal value
🔴		Wild Corporation	New furniture sales	Enquiry	John Wick			EUR 0
🔴		Car Making Corporat	Deal: DIT9	Proposal	Atollon Admin			EUR 506,000
🔴	todso	Today Software a.s.	Opportunity for deliv	Won	deletedUser			EUR 0
🔴	schso	Schloss GMBh.	Product Z Sales	Lost	deletedUser			EUR 0
🔴	passso	Pascal	Product Y Sales	Enquiry	deletedUser			EUR 0
🔴	malso	Malév Zrt.	Product X Sales	Proposal	deletedUser			EUR 0
🔴	hooso	Hoover Scroover	Upselling	Presentation	deletedUser			EUR 0
🔴	gresso	Grun Gras GMBh.	Consulting sales	Qualification	deletedUser			EUR 0
🔴	ersso	Erste Medienagentur	New top opportunity	Proposal	deletedUser			EUR 0
🔴	elbso	Elba IT Solutions	New business	Won	deletedUser			EUR 0
🔴	appso	Apple	New services	Won	deletedUser			EUR 0

- It is possible to create project under sub-folders even from projects / deals overview. Until now this was possible only using Finder.



Icon	Deal #	Client	Deal name	Status	Owner	Last marketing ...	Last contacted	Deal value
🔴		Our best customer	New architecture serv	Enquiry	John Wick			EUR 0
🔴		Wild Corporation	New furniture sales	Enquiry	John Wick			EUR 0
🔴		Car Making Corporate	Deal: DIT9	Proposal	Atollon Admin			EUR 506,000
🔴	todso	Today Software a.s.	Opportunity for delive	Won	deletedUser			EUR 0
🔴	schso	Schloss GMBH.	Product Z Sales	Lost	deletedUser			EUR 0
🔴	passso	Pascal	Product Y Sales	Enquiry	deletedUser			EUR 0
🔴	malso	Malév Zrt.	Product X Sales	Proposal	deletedUser			EUR 0
🔴	hooso	Hoover Scroover	Upselling	Presentation	deletedUser			EUR 0
🔴	gresso	Grun Gras GMBH.	Consulting sales	Qualification	deletedUser			EUR 0
🔴	ersso	Erste Medienagentur	New top opportunity	Proposal	deletedUser			EUR 0
🔴	elbso	Elba IT Solutions	New business	Won	deletedUser			EUR 0
🔴	appso	Apple	New services	Won	deletedUser			EUR 0

- It is possible to create organization branches (sub-folders) during New project creation. This helps when client has branches and you want to fine-tune relationship to larger organizations with branches.
- Integration to several ERP systems in one ATOLLON workspace is now easier. Consolidation of records among several organization units (ie contacts database or products) is easier.
- Deal calculation improved for multi-currency products with purchase prices.



- It is easier to modify deal currency and at the same time change individual exchange rate.

## General

- Login to system is now automated on trusted computers. No need to add password twice.
- Sidebar will be hidden after start now.

## Invoices Issued

- It is possible to change default due days for issued invoices. Previously this setup was per contact, now the default is general (for the whole system), but you can still add individual due days to each contact.
- It is possible to disable editing invoice number(s) for users without invoicing super-powers (authorize rights).

## Invoices Received

- Approval value is now by default calculated from total excl. VAT.
- New business intelligence Cube "Invoice Approval History" may now provide insight into Supplier / Customer invoice approval statistics.

# Recruitment

- New search criteria to applicant search added - now it is possible to filter for candidate type (ie applicant, temporary help, contractor, VIP, etc.)

# Workflow

- New plugin "Context Workflow Actions" enables you to create clone of existing Activity - that includes form values, shift of service dates. This automates regular service activities.

# Bug Fixes and Backend Improvements

- Communication > Tasks - Creating message follow-up task - fixed new task date from .. to.
- Communication - Many under the hood improvements for reliability of e-mail communication, mass mailing of thousands of e-mails in a batch, completely rewritten composing of new e-mails to follow newest standards, etc.
- Communication - Fixed printing e-mail with various encodings in body (ie Czech characters coming from legacy e-mail systems)
- Contacts - Once new contact folder (client, supplier, employee,...) is created by drag & drop, it is immediately visible and ready for use.
- Contacts - VAT number is not added automatically, if not filled-in previously.
- Recruitment - When first job advertisement added, it was not saved to selected target channel. Now it is more reliable.
- Recruitment - Fixed adding empty lines into job advertisement's HTML editor

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Revision #7

Created 6 December 2022 11:05:06 by Jan Safka

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