

Atollon Innovations 2023 (week 14)

New Features

Atollon Robot

- Setup for backend automation improved, now special user entity is available to execute your commands even when you sleep. Used for example in sending **weekly reports** automatically. You can use Atollon Robot to execute your time-managed tasks or when using other automated workflow actions.

Atollon Robot

← → 19 JUN



Weekly Report - Management

Ahoj Honzo,

v příloze naleznete Váš report.

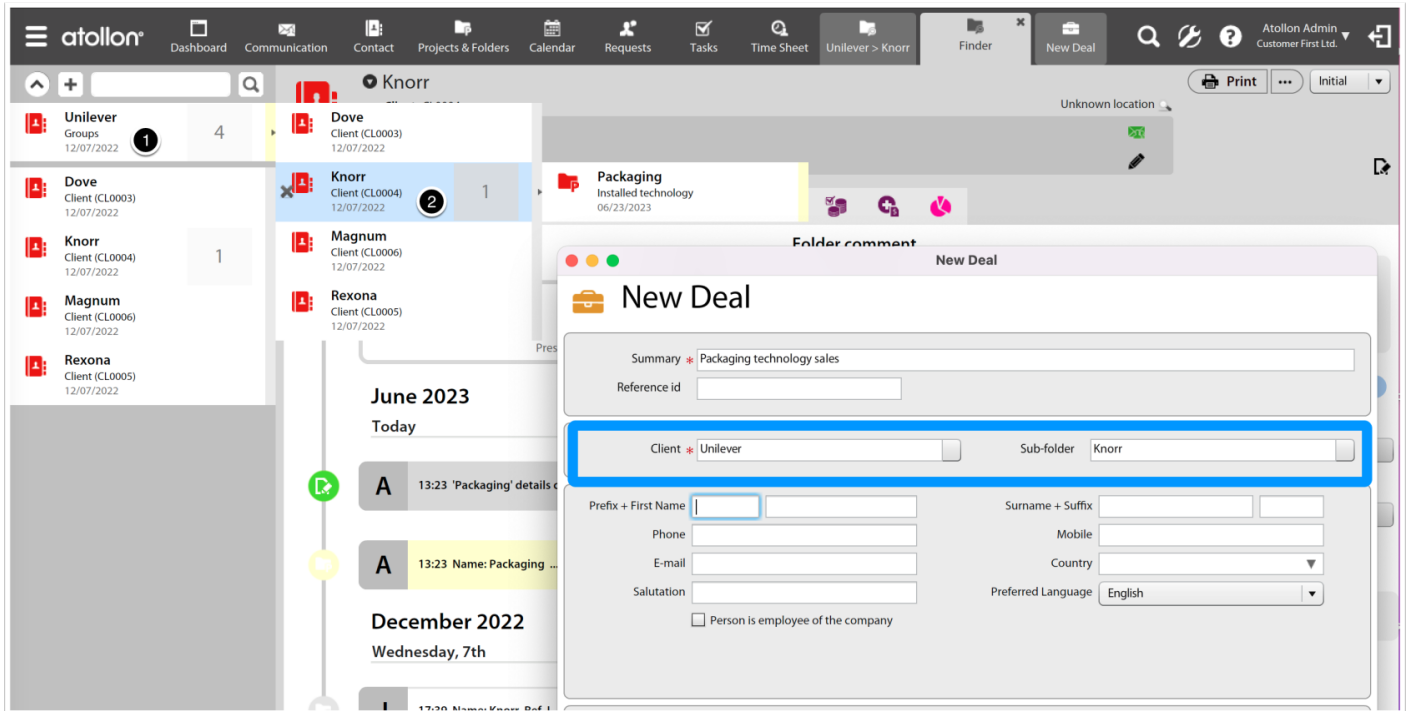
Top rep

Report byl vytvořen v nové generaci CRM řešení ATOLLON CUSTOMER SUCCESS
PLATFORM (www.atollon.com).



Client's branches

- It is possible to create **new project and (service) activity** in one of the **branches** of your clients. This is specially useful, when your client has multiple branches in remote locations. The context hierarchy is then: **Client > Branch > Project > Activity**, which may be used for example in structure, such as: **Apple Co. > Apple Cupertino > Project**



- It is possible to filter on all projects from both your Client (master folder) and client's Branch.

Enhancements

General

- Creating new user now automatically creates first user's mailbox, so the user is ready to start immediately even with e-mail communication.

The screenshot displays the Atollon application's 'Users' management screen. A modal window is open for creating a new user. The modal is titled 'New User' and has tabs for 'View', 'Delete', and 'Send'. The 'New Contact' tab is selected. The form includes the following fields and controls:

- User Template:** A dropdown menu set to 'Service Manager'.
- User Name:** A text input field containing 'joemaster'.
- Password:** A text input field with masked characters '****'.
- Confirm:** A text input field with masked characters '****'.
- Generate Password:** A button to generate a password.
- First Name:** A text input field containing 'Joe'.
- Last Name:** A text input field containing 'Master'.
- Email:** A text input field containing 'master@customerfirst.com'.
- New mailbox:** A section with a text input field containing 'joemaster' and a dropdown menu set to 'smartco.atollon.com'.
- Buttons:** 'Cancel' and 'OK' buttons at the bottom right.

- New custom form design allows to enter default date for today.

Contacts

- New drag & drop functionality to mass-add contact to industry.

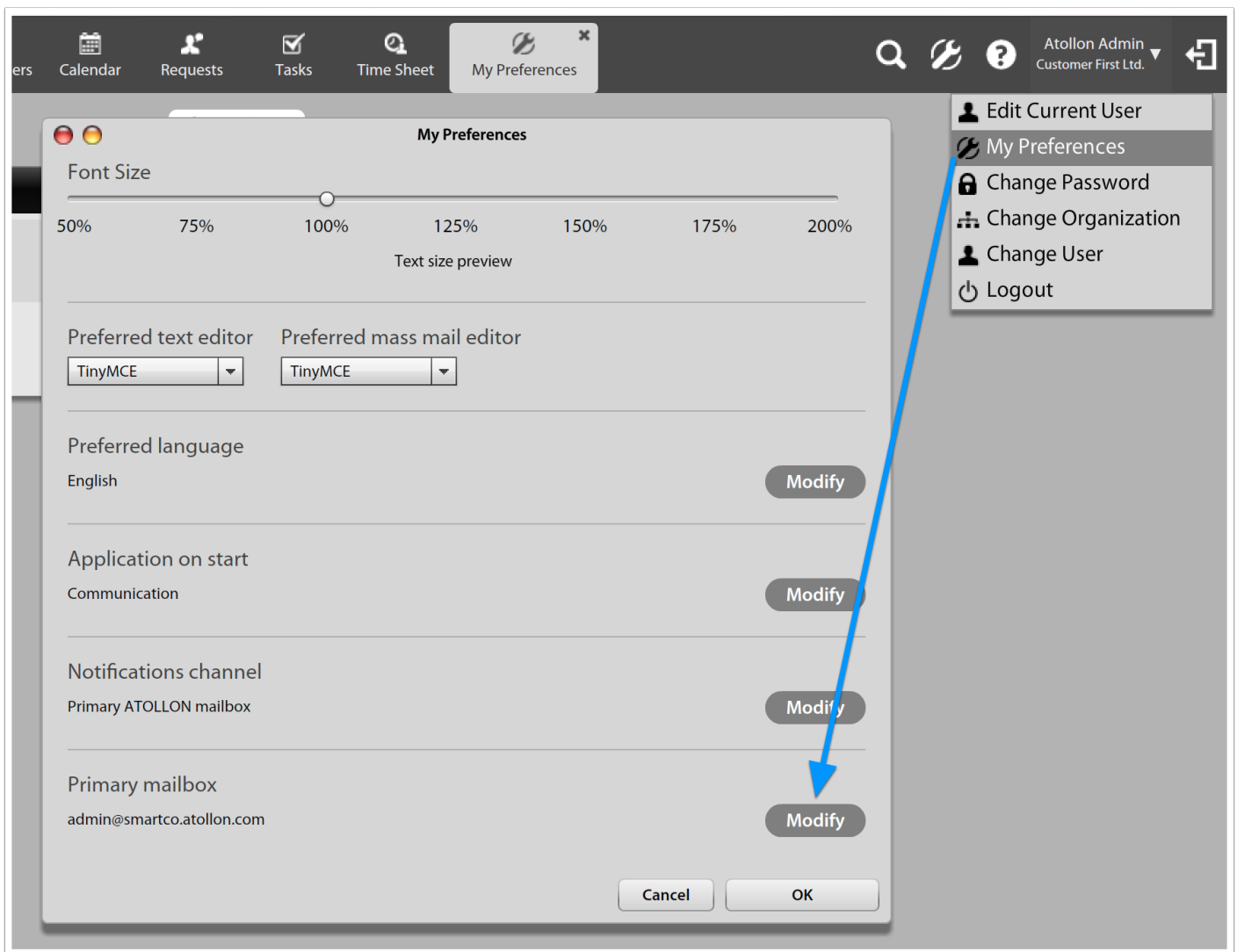
https://www.youtube.com/embed/BG9AT_aojDw

Invoices Issued

- It is possible to print QR code together with invoice. Just fill-in IBAN/BIC on the invoice and it's ready.

Mailbox Administration

- It is possible to set-up **shared mailbox**, such as "service" or "sales", which is used by selected users. Mailbox administration has been rewritten.
- Users may select **default mailbox** in **My Preferences**. In case user does not have any default mailbox, application requests it's setup during runtime.



Recruitment

- New view for listing **job advertisements** as been added with many filtering options, such as job ad active/closed, in relation to vacancy status and advertisement channel.
- In recruitment applicant search, criteria "**Suitable position**" is now filtered on relation to **Job Field**.
- New version of Textkernel's CV parsing adopted, allowing you to import CVs without manually rewriting any data.

Workflow

- Users may now configure **workflow plugin actions** without Atollon consultant's assistance. Previously it was impossible, because db update was necessary.

Bug Fixes

- BIC code is properly transferred from contact information, if filled-in in Bank details (of provider - our organisation contact).
- Android: Application modules are loaded even if supported versions (your instance vs. installed version) do not match. Sometimes Android client did not start, when versions compatibility is not assured, which is difficult on Google Play Store.
- AtollonLoader - application that takes care about desktop app upgrades is now more reliable and allows one-time only administrator password during installation. When upgrading main Atollon app, admin password is no longer required.
- PDF preview - on Invoice approval screen, PDF preview is working again on all platforms, incl. Win, Mac and Android.
- Sometimes mail identity was not loaded properly, this should now be fixed. Also option to select from mail identity should be working just fine.
- Importing products to Deal fixed - proper setup of currency of imported records.
- Report Packs - fixed modification of reports in report packs.
- Recruitment - fixed bug in Applicant's desired position saving.
- Invoice - fixed rounding bug for very large number of records in invoice.
- Project timeline - fixed adding project status changes into timeline.
- Document download - fixed encoding of document names, diacritics in documents now displayed properly.

Revision #9

Created 8 April 2023 09:31:30 by Jan Safka

Updated 23 June 2023 13:50:24 by Jan Safka