Communication

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Communication Overview

Communication Channels

Currently supported communication channels in Atollon are: e-mail, sms, phone call, event, task, document & internal notice. These communication channels will be extended in the future releases of Atollon.

E-mail

E-mail is sent and received by Atollon using Atollon Mail Server. Atollon may handle e-mail communication for unlimited number of domains (ie domain.com) and mailboxes (ie mailbox@domain.com).

For internal Atollon communication, **Notices** should be used instead to not duplicate message communication using e-mail forwarding and replying.

Notice

Internal message sent from one Islander to another. Notice should be placed in context (on some Folder).

SMS

Atollon uses own SMS gateway, utilizing Web Services connectors of various telecommunication providers. Contact Atollon Consultant once you want to set-up your access to SMS gateway.

Phone Call

Atollon may simply dial phone call using Skype. No PBX integration is supported yet, but it is expected we will integrate more telephony solutions in near future.

Event / Task

This is just special type of notice, indicating that the user was invited to calendar event or some task was assigned to him/her.

Document

Internal notification to a copy of document stored in Atollon Documents.

Main Communication Folders

To Do

Why is this folder called ToDo, instead of Inbox (as in other mail clients?). While it contains both incoming & outgoing correspondence. And because most of the correspondence should be **corporate messages**, you should make sure you **completely empty/solve** this ToDo message container. You can move messages (to personal or organization's folders) or delete them. Ideally, it should contain only few unresolved e-mails. Avoid keeping hunderts or thousands of messages here.

This folder contains all messages (e-mails, sms, notices, meeting notes, phone calls) that are to be solved in the following manner:

They are either **references** to incoming messages (e-mails, internal notices) that were placed by Atollon Trolls in context (Finder's folders, projects, activites). These can be **deleted** after they are solved from your side. Once you delete reference to message, you do not delete original message. Original message remains stored in history of any Folder, Project or Activity.

They are also **original e-mails** received (and not recognized by Trolls) placed to ToDo and notes taken by you. Because your Trolls did not do their job, you should **move** these messages to context or personal message folders yourself. Or you can delete them, if they are not needed any more.

They are also **outgoing messages** created by you, which were not placed by you to any context. You should **move** them to some context, to your personal message folders or **delete** them.

My Messages

This is view displaying all messages you received or sent using Atollon. There are all messages, both ToDo & already placed, in company (shared) folders, projects or activities or in personal message folders.

Outgoing

This is view displaying all messages you created, no matter where they are located.

Drafts

Here you can find **saved messages**, which you have not sent yet.

Once you disconnected from system during writing new message, you can find here **auto-saved** messages as well.

Trash

Here are all messages **you deleted**, no matter where they were originally located. Once you **undelete** message from Trash, the message restores to the original location.

Corporate Messages

Here you can find overview of **all messages** your organization received into Atollon, no matter where they were located. Only messages which you can view based on your access rights can be displayed here.

Personal Message Folders

You can create personal message folder, where you may file any message that should NOT be shared with the team/company.
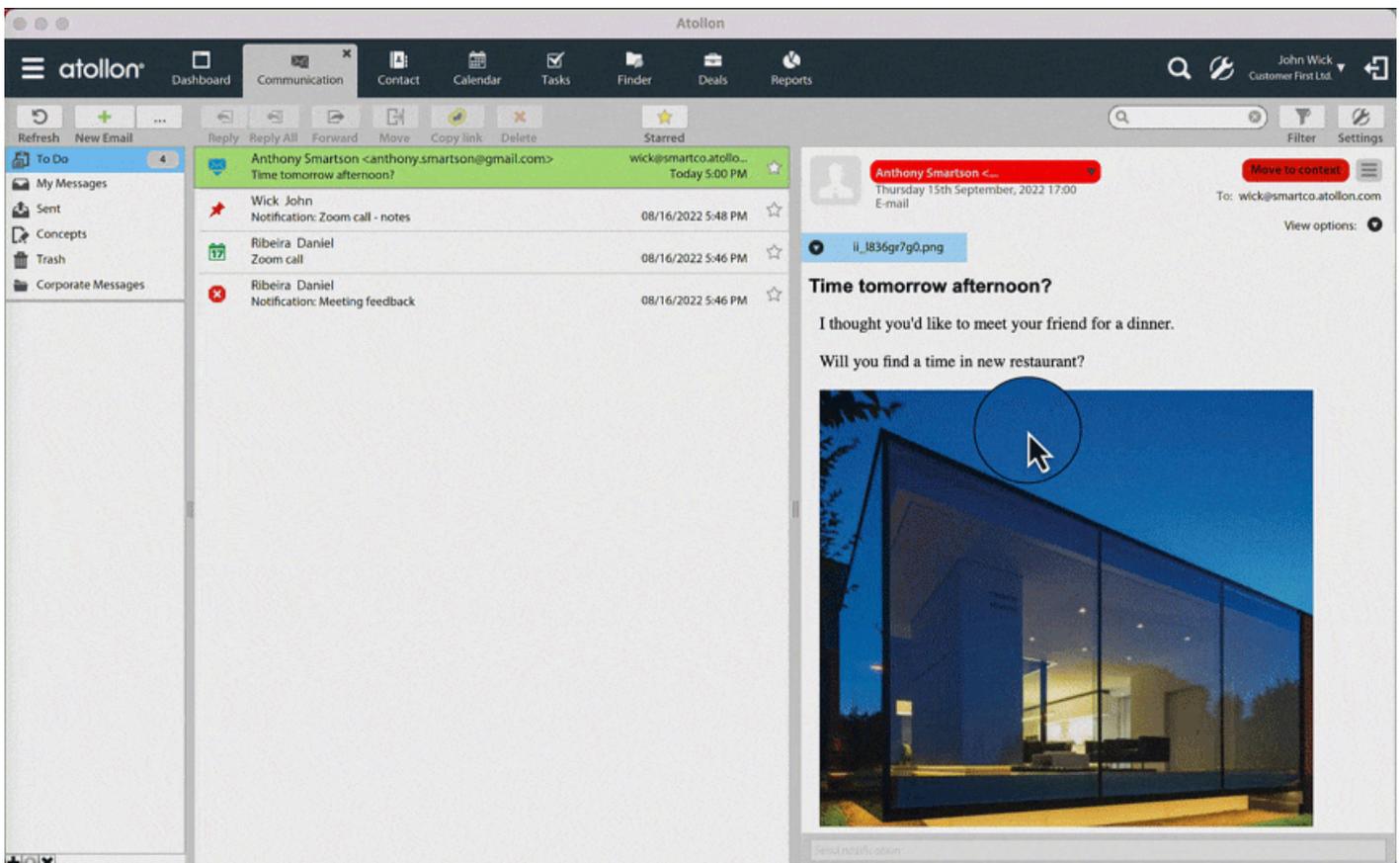
Atollon Trolls taking care about your incoming e-mails

Reply to e-mail

Once you send any e-mail outside of Atollon, the e-mail reference ID is placed to the bottom of each individual e-mail. Once the recipient sends reply to the e-mail and keeps the reference ID of the e-mail within the body of e-mail, the e-mail recognized by Trolls and placed to Atollon as reply to your original message. Trolls will also send you reference message to your ToDo, so that you are informed about new incoming e-mail. You may simply delete this reference after you solve/read the incoming e-mail.

Project/Folder Messages

If sender of e-mail adds project Reference ID (Job Number) after "-" sign into message subject, like: "New proposal - REFERENCEID", Atollon Trolls will do the work for you and place this e-mail under project with the same **Reference ID**. Trolls apply the same rule to any Folder and Folder's Reference ID in Finder.

Set-up auto-response

Do you want to send your partners information that you are not available now?

Go to Options & Tools > Mailboxes
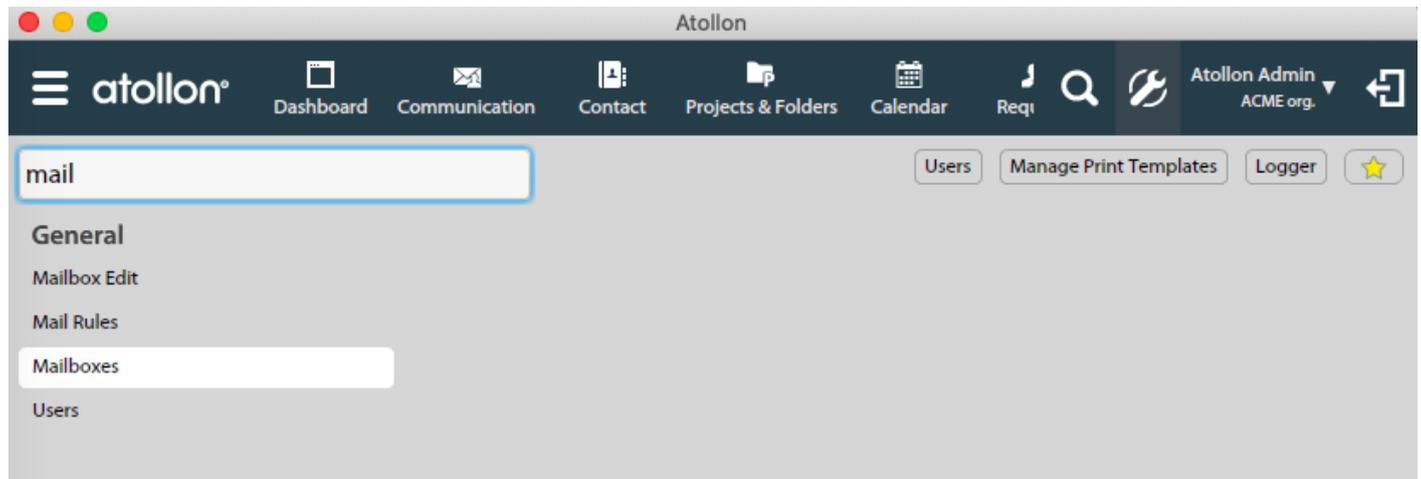
Allow Auto-response
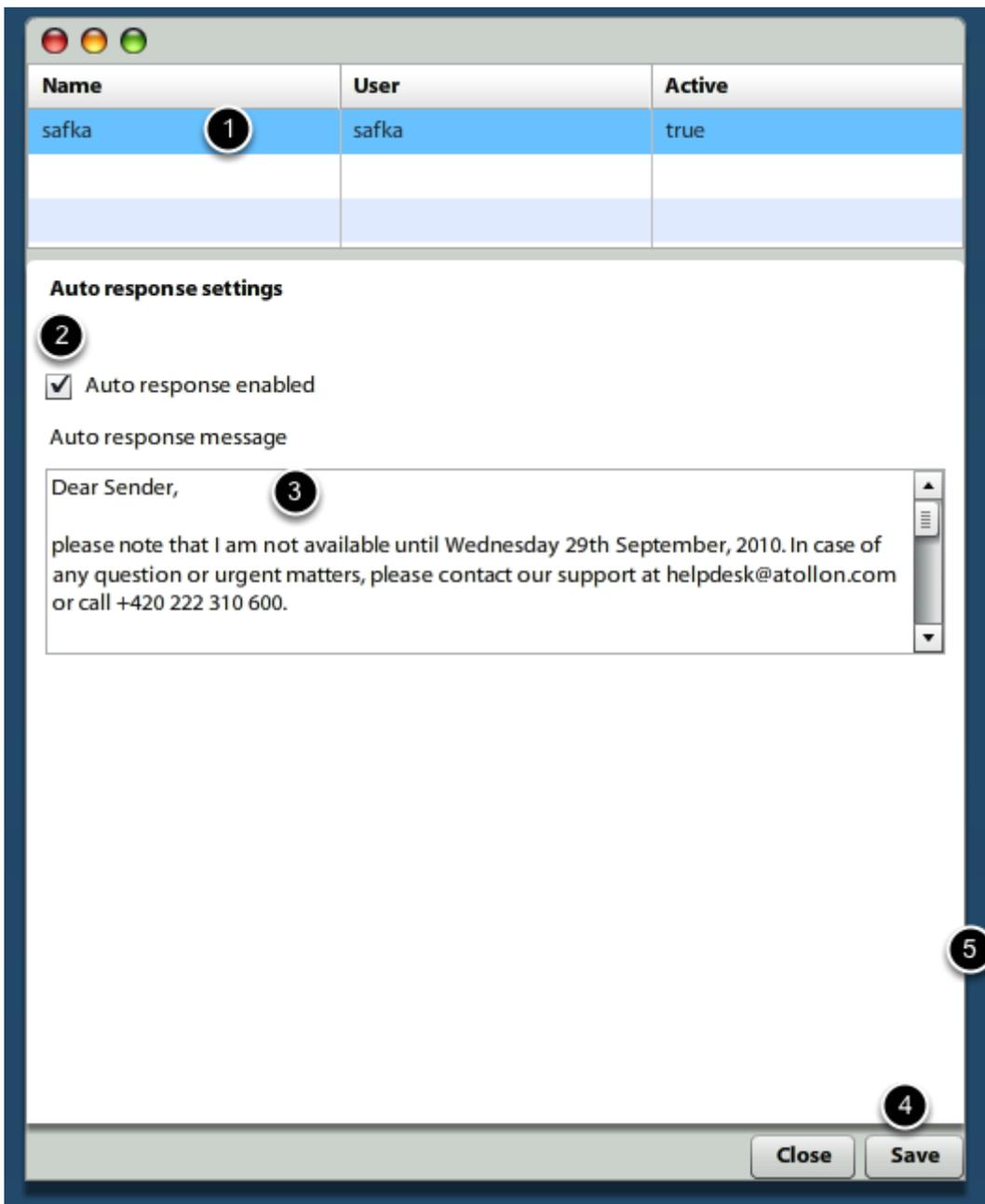
First select **mailbox** (yes, you can have more mailboxes), then allow **Auto response** and write your message. In the end, do not forget to **Save**.

Now once someone sends you e-mail (message), he/she gets the notification automatically.

Message Templates

Message templates are used mainly in connection with sending e-mails to your clients, prospects or partners.

Message template may be used when sending individual e-mail correspondence. Message template is required when sending Mass Mail. Message template is heavily used when automating processes using Atollon Troll (Workflow) module.

Message Templates Overview

The overview of message templates provides list of **Message Template Containers**. Click on one of the containers to add / view / edit / delete one of the message templates on right.

You can filter only for Message Templates in specific language by selecting one of the languages in the list of languages.
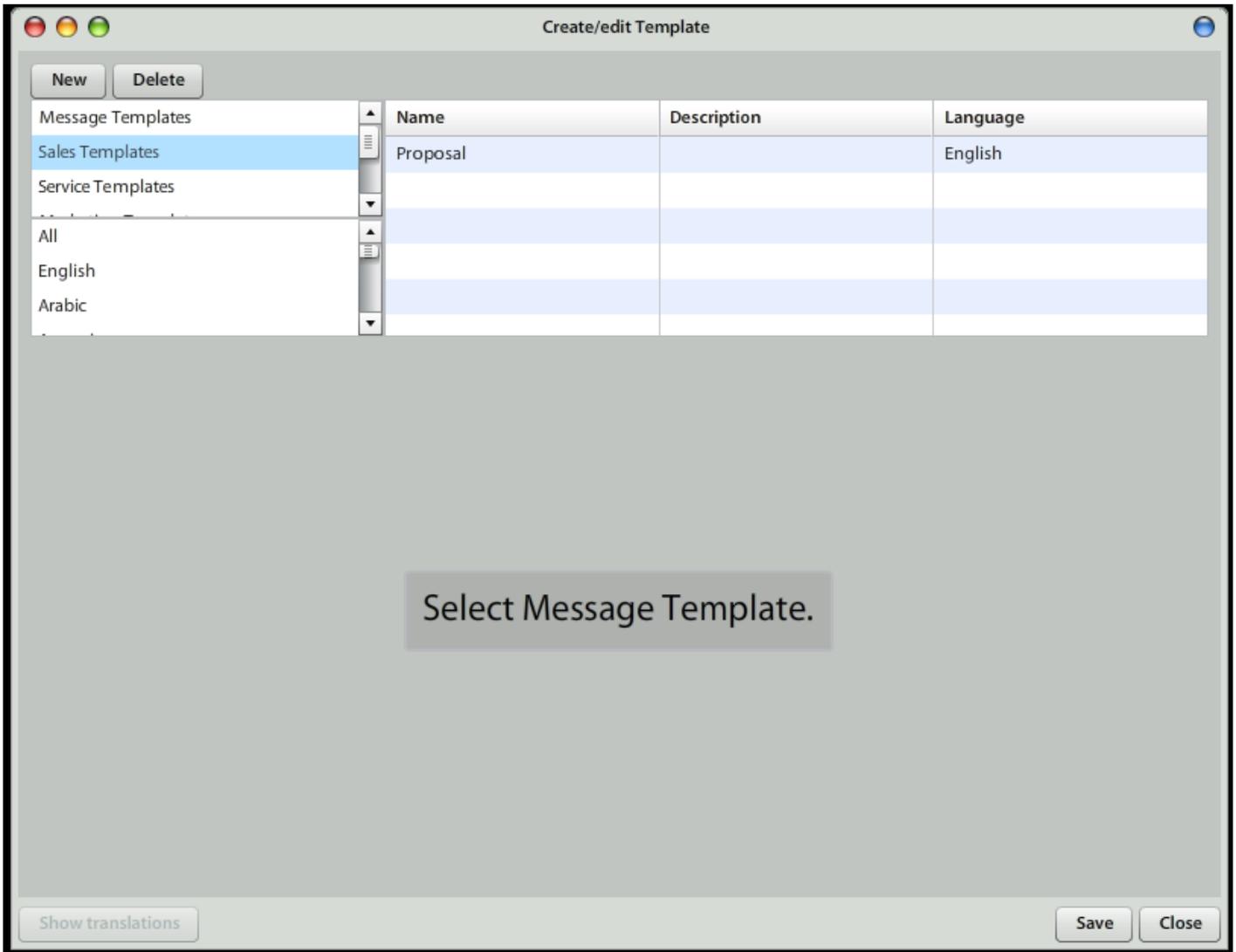
Edit Message Template

To edit the Message Template, double click on one of the items in grid.
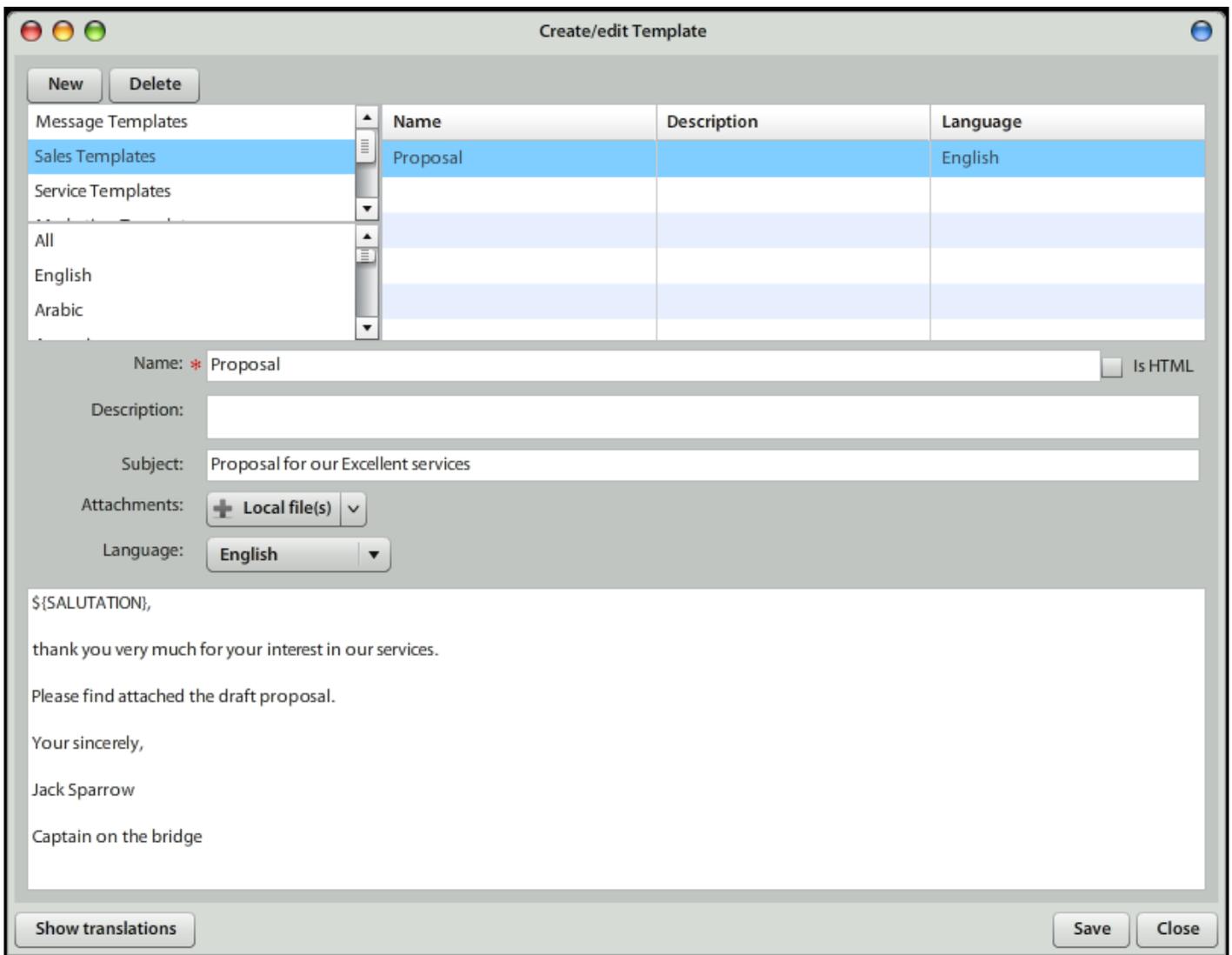
Once you make any changes, do not forget to press on "Save", please.

You can attach one or more files or documents to each Message Template.

Message Template Languages

Each message template may have indicated language, in which the template is prepared. This is particularly useful when automating workflow actions on multi-lingual web sites, etc.
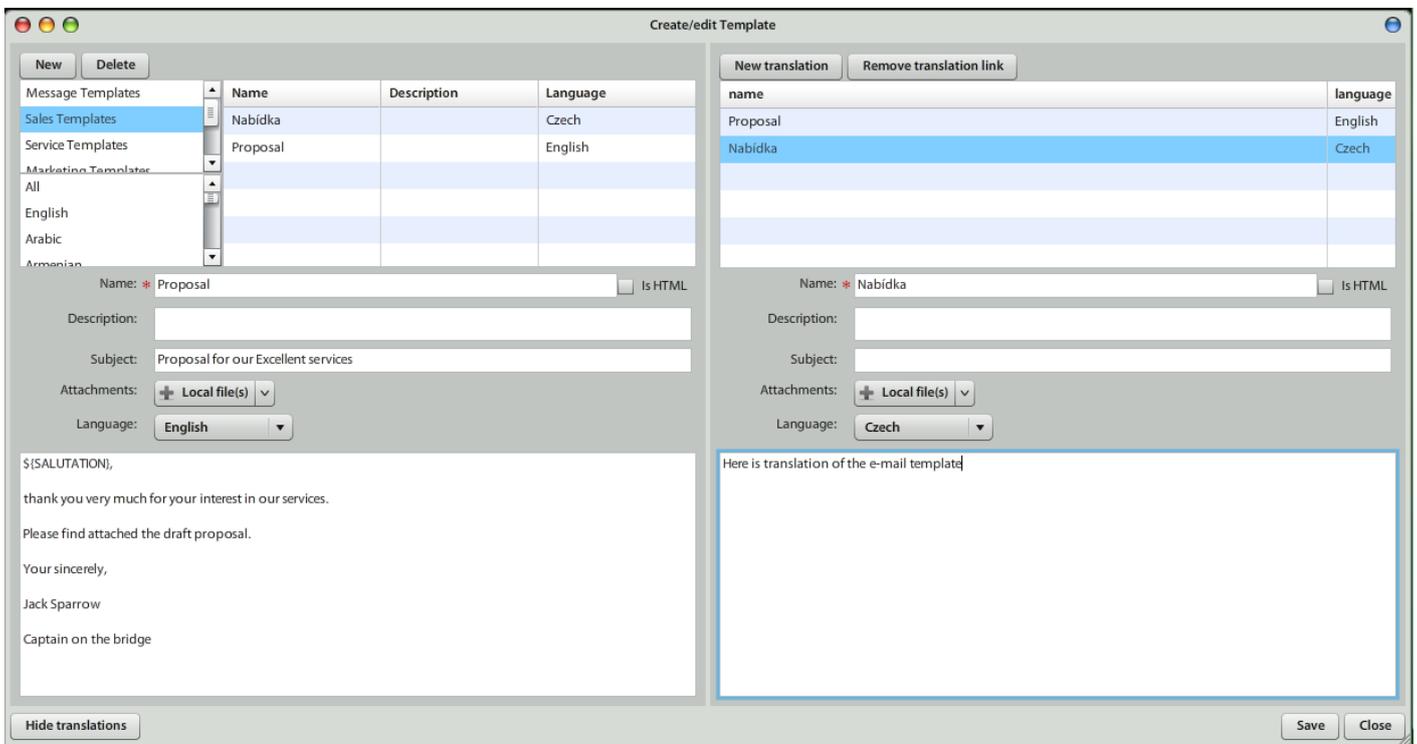
Mail Merge Fields

Basic rule for using merge fields:

- ${CAPITAL-LETTERS} - may be used on both client & server side
- ${small-letters} - may be used on client side only

General

```
${SALUTATION} | Enters the string that is found in recipient contact's Salutation field.

${SIGNATURE} | Enters user's mailbox identity signature.
```

Calendar / Tasks Notifications

```
Main tags

${NAME} | Task / Event name

${DESCRIPTION} | Task / Event description

${STATUS} | Task / Event status

${START} | Task / Event start date/time

${END} | Task / Event deadline / end date/time

${CONTEXT} | Task / Event context
```

```
${TYPEOFWORK} | Task / Event context


Other tags

${LOCATION} | Event location

${PRIORITY} | Task priority

${DURATION} | Event duration

${REMAINING} | Event duration


${USERS} | Event participants / Task solver

${GARANTS} | Resource garants

${RESOURCES} | Resources
```

Service Level Notifications

```
${REQUESTSUBJECT} | request subject

${REQUESTDESC} | request description

${REQUESTIDENT} | request id

${REQUESTSENDER} | request sender

${REQUESTPROJECTNAME} | project & subject (if is known)

${REQUESTDATETIME} | request date/time
```

Message Context Dependent Fields

```
${ACTIVITYNAME}

${ACTIVITYREFID}

${PROJECTNAME}

${PROJECTREFID}

${MASTERPROJECTNAME}

${MASTERPROJECTREFID}

${FOLDERNAME}

${FOLDERREFID}

${CONTEXTREFID}
```

Recipient Dependent Fields

```
${RECIPIENT-ID}
${RECIPIENT-EMAIL}
${RECIPIENT-FIRSTNAME}
${RECIPIENT-MIDDLENAME}
${RECIPIENT-LASTNAME}
```

Invoice Fields

```
${doc_number}
${doc_descr}
${doc_total_amount}
${doc_due_date}


Same naming conventions are for all following items (${word before :}


doc_number: "invoiceNumber",
doc_descr: "transactionsName",
doc_total_amount: "totalWithVAT",
doc_due_date: "dueDate",
doc_ccy: "currency",
doc_ccy_rate: "currencyRate",
doc_bank_code: "bankCode",
doc_bank_account: "bankAccount",
doc_iban: "bankIBAN",
doc_description: "description",
doc_header_text: "headerText",
doc_footer_text: "footerText",
doc_summary_text: "summaryText",
doc_period_from: "periodFrom",
doc_period_to: "periodTo",
doc_trans_name: "transactionsName"
```

Custom Form

```
${generatedLink}
```

Campaign Planner / Event

```
${eventFrom}
${eventTo}
${eventLocation}
${eventUserName}
${eventDescription}
```

Folder / Project / Activity (Context items)

```
${contextName} -> name
${contextReferenceId} -> referenceId
${contextComment} -> comment
${contextCreated} -> created
${contextCreatedBy} -> createdByName
${contextModified} -> modified
${contextModifiedBy} -> modifiedByName
```

System IDs for message templates in system

SystemId	Description
com.atollon.messaging.issudedinvoicemail	template with message for mail with issuded invoice
com.atollon.messaging.invoicereceivedmail	template with message for mail with recieved invoice
com.atollon.messaging.orderissuedmail	template with message for mail with issuded order
com.atollon.messaging.orderreceivedmail	template with message for mail with recieved order
com.atollon.messaging.estimatemail	template with message for mail with estimate