

Contexts Overview

Introduction

Atollon Finder is the main **content navigator** in Atollon. Atollon stores all data in **context** that is visible through Finder.

Finder Video Tutorial

Flash Animation
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<https://www.youtube.com/embed/140nPo12Z60>

Finder Main Window

First column in Finder displays **filter** for **Folder Types**, which are stored in **Organization's root**. You can directly search for all folders by selecting "All" option or you can select one particular Folder Types only (for instance "Clients").

The button for creating **new** Folders in Finder is context-sensitive. It's list of available Folders is changed automatically based on selected Folder (and it's Folder Type) in Finder. Each Folder Type may create different Folders. For instance you can only create New **Sales Opportunity** Project Folder under **Client** and **not Partnership Project**, which belongs to **Partners** Contact Folders only.

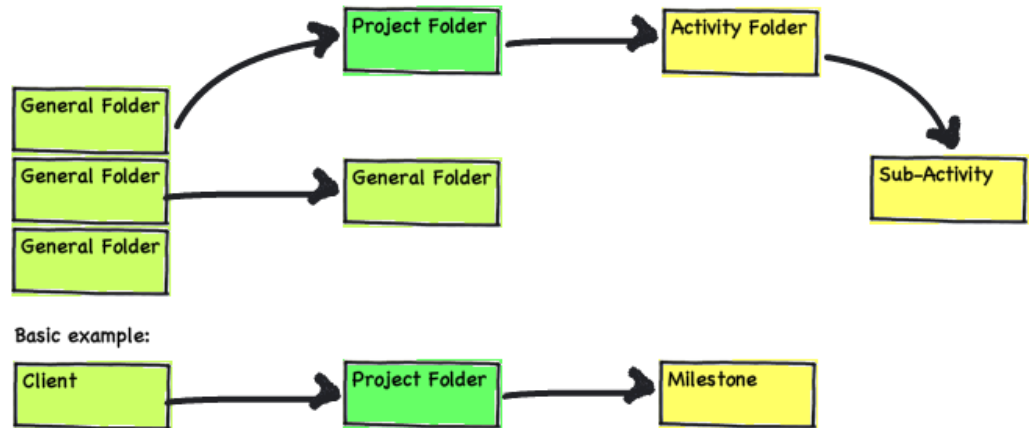
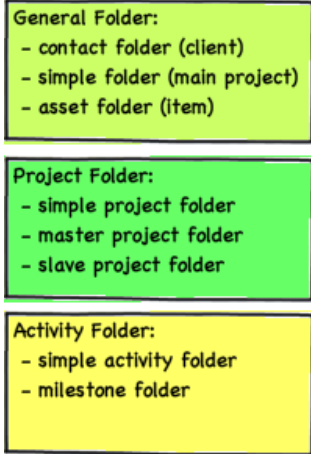
Finder Structure

The basic context structure contains the following **Folders**:

Contact Folder > Project Folder > Milestone Folder

See the illustration below for more details:

Atollon Finder Structure



Creating New Folders

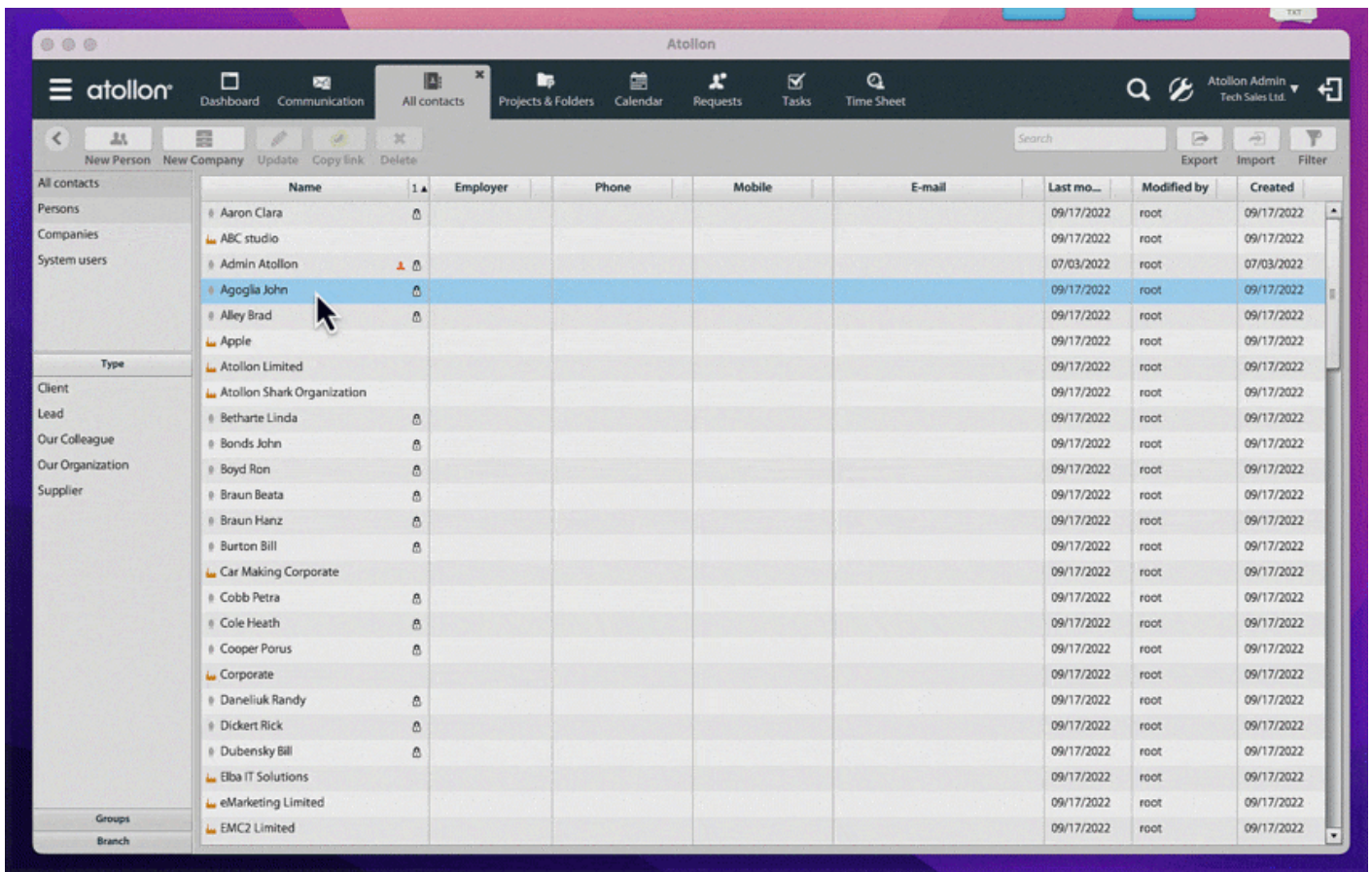
New Folders in Finder are created using Folder Templates.

Creating New Folder

In Finder's root level can be created only General Folders, incl. Simple Folders and Contact Folders (Clients, Partners). New General Folder may be created under any other General Folder, therefore you can create the whole tree of folders.

Create folder to contact

Existing contact (company or person) may have a folder in ATOLLON, which is core for any CRM functionality. Easily drag & drop contact to chosen contact type (Client, Supplier, Partner, etc.)



Creating New Project Folder

Project Folder must be created under any General Folder (based on Folder relations settings).

Creating New Activity/Milestone

Activity/Milestone Folder may be created only under Project Folder.

Searching in Finder

You can search in Finder only in one particular (selected) level. Finder displays all Folder Types in each level together. You can differentiate Folder Types by using different colors (applied for each Folder Status differently).

Main Atollon search bar (top Toolbar) searches immediately in Finder's root level. It is useful therefore to find appropriate Client first, before looking into Client's projects.

Once you select any Folder in Finder, you can search another levels as well.

Finder Filtering

You can filter Finder for:

- Folder Base Status (Initial, Active & Closed)
- Responsible User (user responsible for Client, Partner, Simple Folder, etc.)
- Organization Dimensions (Organizational Units, Departments, etc. - which must be set-up during implementation)

Folder Status

Each Finder Folder may have various States. These States are customizable for each Folder Type. For instance Clients in the database may have states indicating their relationship with the company, such as Lead, Prospect, Potential, Current, Hot, Lost). Each status has also Base Status, which is Initial, Active & Closed.

Finder displays by default automatically only Folders in Initial & Active States. By changing Finder's filter, you can display all States (incl. Closed Folders).

Finder Access Rights

Access Rights for Finder's Folders are based on Folder Templates. Each Folder Template may define how to set access rights for each individual new Folder. New Folder's access rights may be taken from (inherited from) Organization's root, parent Folder or any other folder defined by Administrator.

Access to Finder Folders may be extended by adding Users into Roles or by customizing each individual Folder's Access Rights.

Because Access Rights are usually inherited (tree-based), there may be Folders in finder that are not visible by everyone.

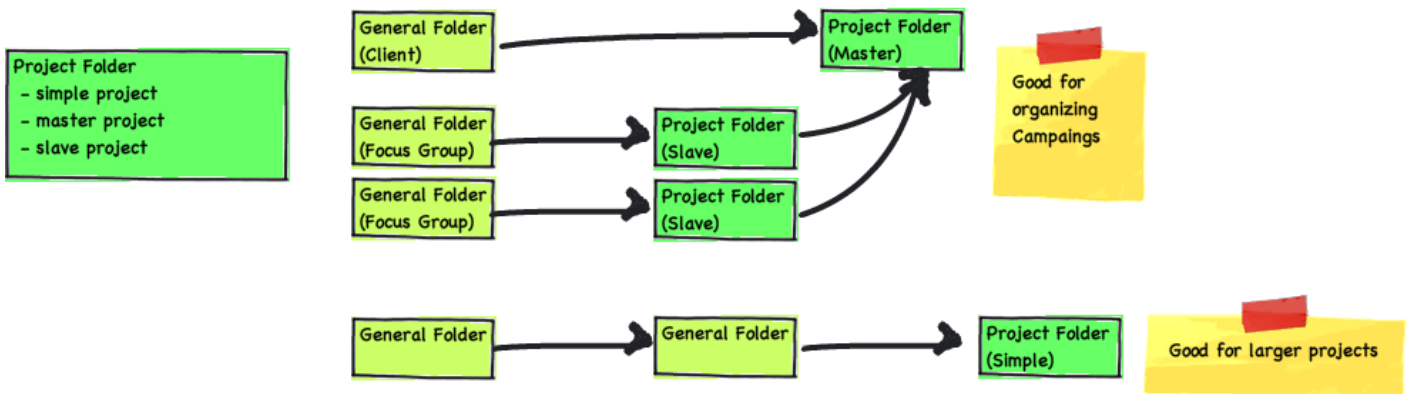
Finder Tabs Customization

It is possible to customize each Folder's detail using Activity Panel Settings. The detail may vary for each **Folder Type** and **User Profile**. Therefore each Islander may display different Tabs based on their User Profile, for instance administrative staff may display different Tabs in comparison to management or end users.

Master/Slave Project Structure (Campaigns)

Project Folders may be bound in Master/Slave structure. See the illustration below:

Project Master / Slave relationship



Example

Project Master/Slave relationships are used to track mainly campaigns, where Master Project is Campaign, Slave Project is Campaign Member. Campaign Member project has relation to it's Master Campaign.

Campaign Overview

Messaging

It is possible to display all messages sent/stored in connection to Campaign Memberships in one central location, which is the Campaign. This allows Islanders to get overview about all campaign communications.

Billing

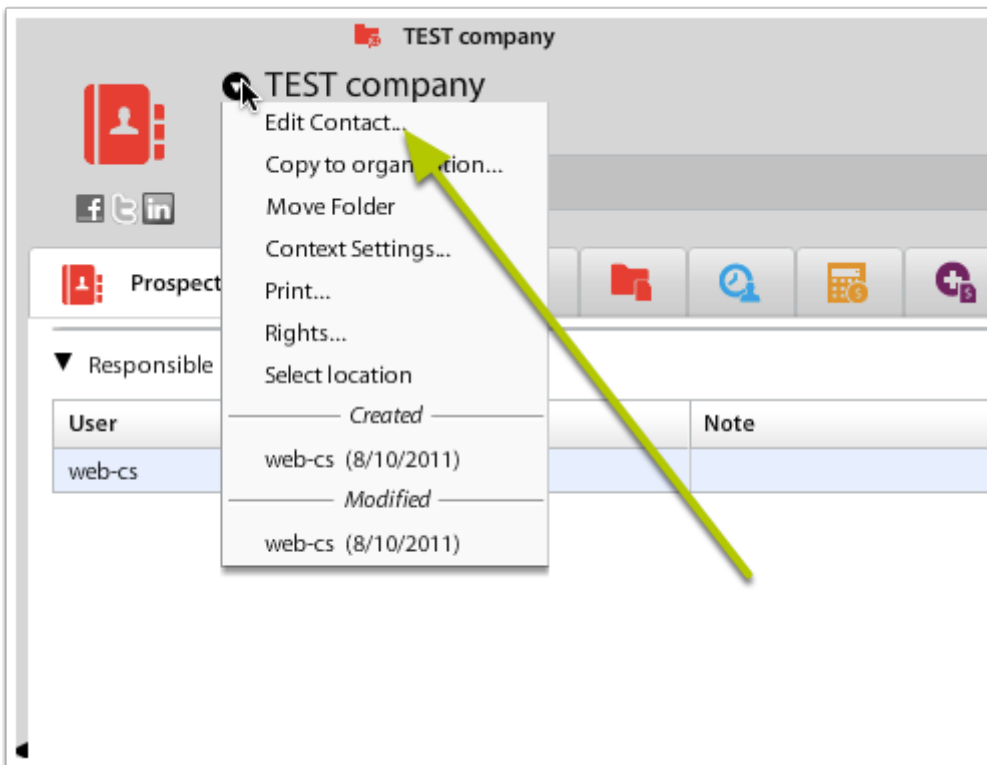
It is possible to get overview about billing status of any item of Campaign Memberships. This way you can easily get financial status of paid trainings, seminars, conferences, etc.

Finder Configuration

See [Context Settings](#) documentation for more information.

Folder Options

Go to the Folder detail and open Edit XYZ (where XYZ is the Folder Type)



Folder Advanced Options

Change Folder Type

In case you want to change Folder Type, you can go to view Other options and use "secret" :-) key stroke: Ctrl + Shift + dbl. click to unhide options: Folder Type and Custom Form.

Please note that changing Folder Type this way may be dangerous and can cause inconsistencies. I.e. when changing Folder Type, you have to be careful to adjust access rights of the folder or custom form.

TEST company

Edit Folder (Prospect)

Name: * TEST company

Ref. id:

Comment:

Ctrl + Shift + dbl.click

▼ Other options

Status: * Active

SLA: -- No SLA --

Product price: -- No Price List -

Custom Form:

Folder Type: Prospect

Cancel OK

Unk

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