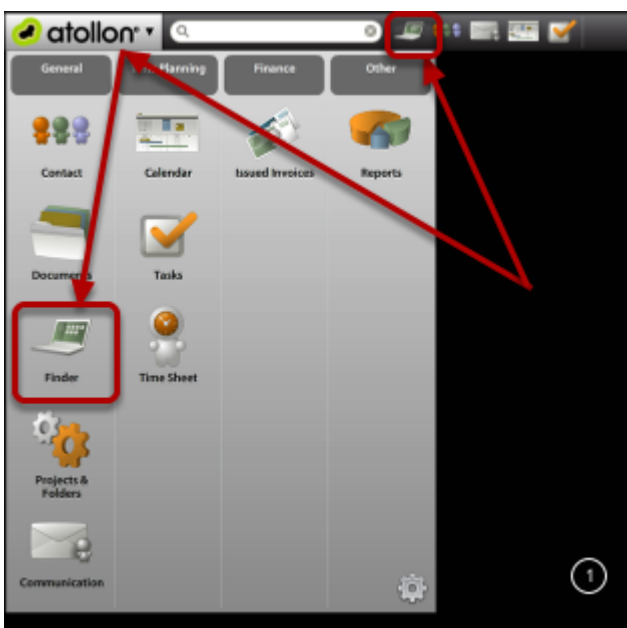


Projects

New Project

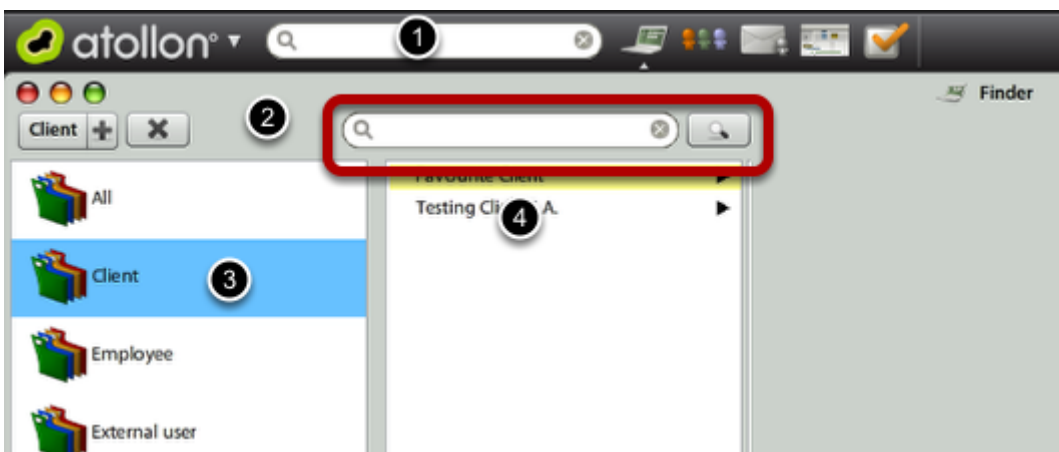
This lesson shows how to create new project for your client in simple **Client > Project** Finder structure.

Open Finder to locate your client



You can open Finder either clicking **Finder** icon in **Atollon Toolbar** or using **Application Launcher**.

Look-up for your client

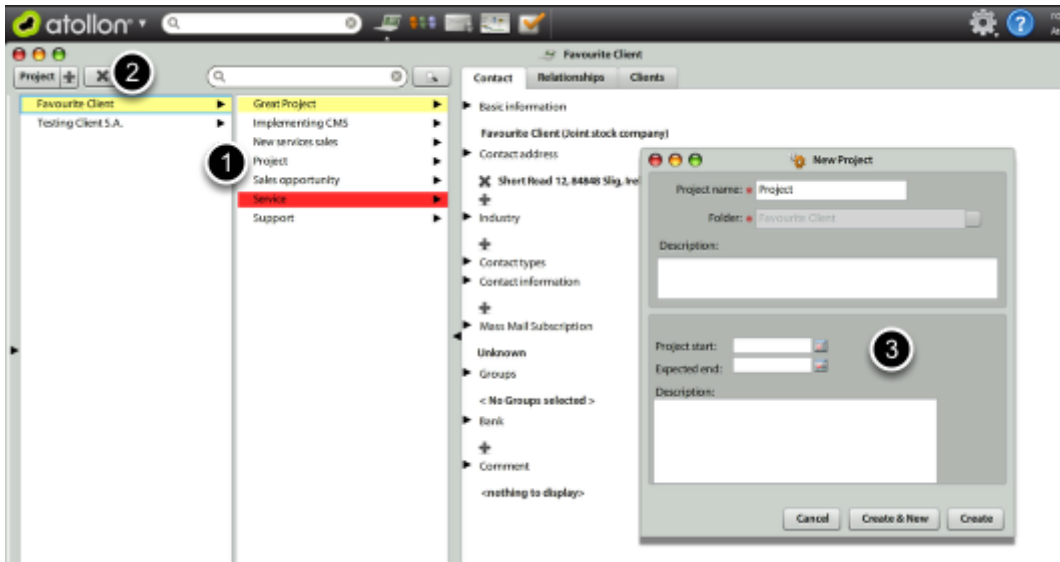


There are multiple ways of opening your client's folder in Atollon.

- 1.) You can directly **search** for it's name in Atollon's search bar
- 2.) You can search for it's name after opening Finder
- 3.) You can click on Clients in Finder and then 4.) browse for the client

After you have found your client, you should select it in Finder. (Alternatively, you can open Client's details by double-clicking on the record).

Create new project from Finder



After you selected your client in Finder, you can select which Type of Project (based on **Project Template**) you would like to create. Select the project in top-left corner of the Finder and New Project window appears.

Create new project from Client detail

Project
Project

Status: Initial
Ref. id:

Copy Edit

Project start: 01/01/2011
Expected end:
Description:

▼ Responsible users +X

| User | Role | Note | Primary |
|-----------|---------|------|-------------------------------------|
| Joe Admin | Creator | | <input checked="" type="checkbox"/> |

▼ External contacts +X

| Name | Note | Primary | Email | Phone | Mobile |
|------|------|---------|-------|-------|--------|
| | | | | | |
| | | | | | |
| | | | | | |

Cancel Apply Save

If you opened Client detail (from Finder, Contacts, Report results, etc.), you can create new project from **Projects and subfolders** tab. Just select the Project Template in top left corner of projects overview.

Adjust project after it was created

Contact Relationships Clients **1**

Favourite Client
Client

Status: Current
Ref. id: 0
Edit

Projects and subfolders **2**

▼ Projects **3**

Campaign Member +

| Name | Folder | Type | Status | Created date | Created by |
|-------------------|------------------|-------------------|--------------|--------------|------------|
| Campaign Member | Favourite Client | Project | In Progress | 10/16/2009 | admin |
| Other | Favourite Client | Project | Initial | 07/09/2010 | admin |
| Project | Favourite Client | Service | Hot Customer | 07/09/2010 | admin |
| Sales opportunity | Favourite Client | Project | Initial | 09/05/2010 | admin |
| Service | Favourite Client | Sales opportunity | Contact | 10/22/2010 | admin |

▼ Sub folders

New +

| Id | Name | Type | Status | Created date |
|----|------|------|--------|--------------|
| | | | | |
| | | | | |
| | | | | |

Cancel Apply Save

After creating a project, you would probably want to assign **Responsible users** (when assigned to project role, this would give them access rights to the project). In case you want to time by time inform your external contacts on project by mass mail, you should attach the external contact to project as well.

New Project (Job) Number is assigned to project automatically, once it is set-up in Numbering Administration.

Revision #1

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