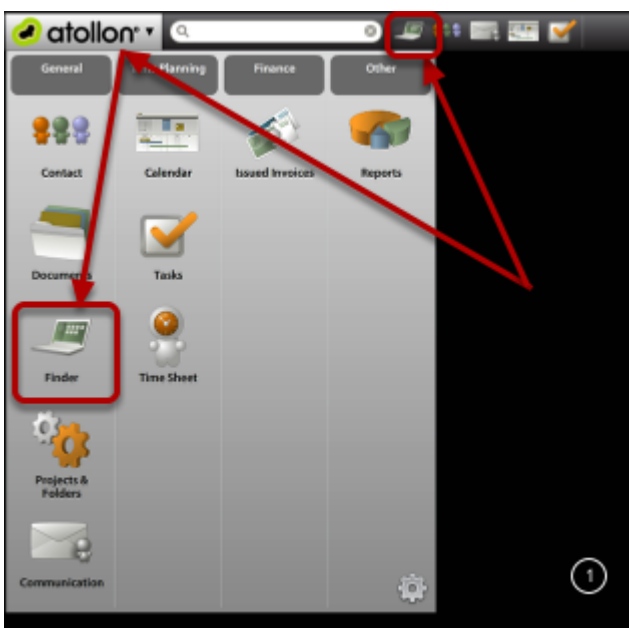


# Projects

## New Project

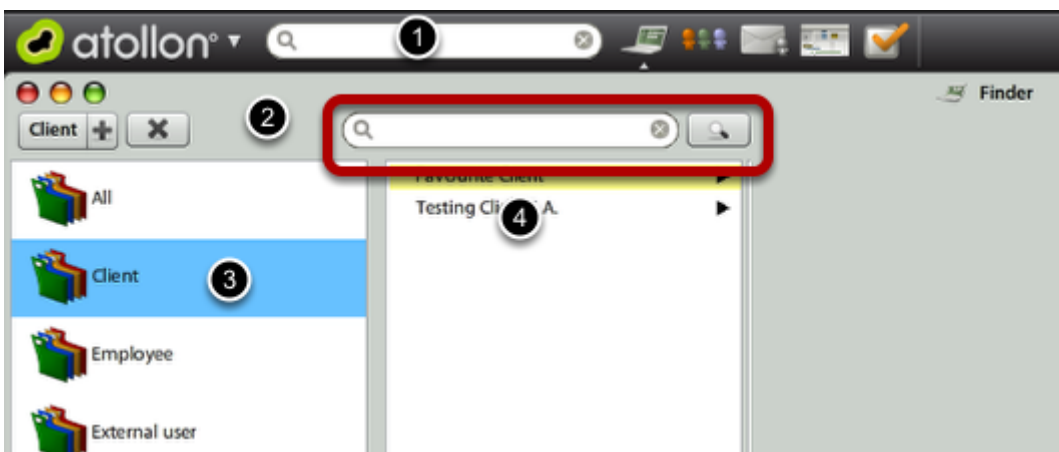
This lesson shows how to create new project for your client in simple **Client > Project** Finder structure.

### 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

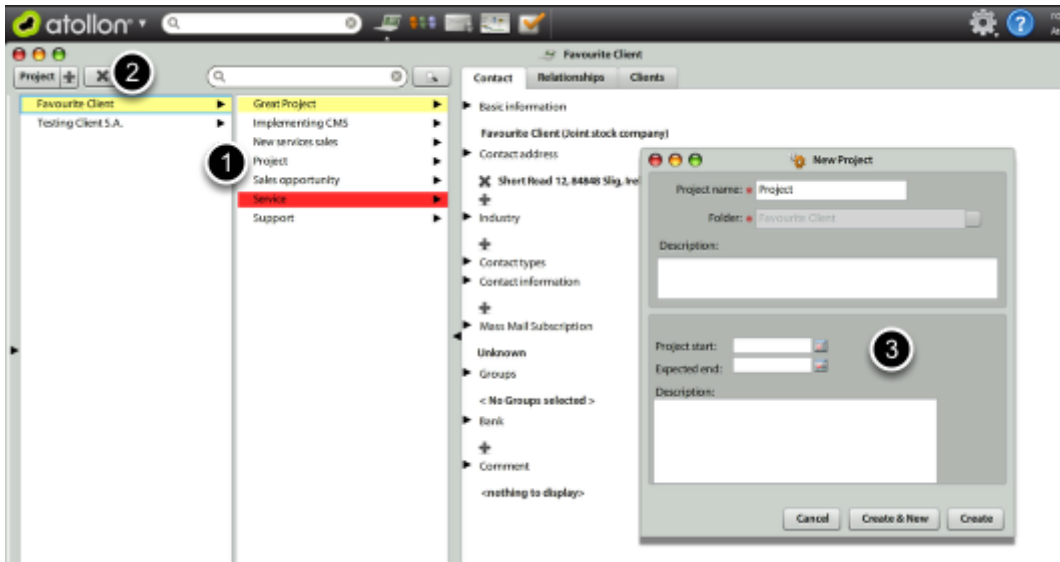


There are multiple ways of opening your client's folder in Atollon.

- 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

Created 16 March 2020 16:46:01 by Jan Safka

Updated 16 March 2020 17:11:02 by Jan Safka