

Settings

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Setup invoice required fields

This features allows you delegate invoice creation to sales people

In case you want to delegate process of creating invoices down to sales people, there is an option.

Usually, during sales process, sales people need to focus on sales, not administration.

But, once the deal is closed an you want to collect cash, it is good idea to send proper invoice. That means, **the invoice should have all required fields filled-in.**

Now you can set-up fields that are going to be required when creating new invoice.

You can search for "Form" in Options & tools and find Form Settings screen, where you can configure what fields are required.

The screenshot shows the 'Issued Invoice' form in the Pioneer CRM Demo. The form has fields for Number, External number, Journal, Currency, Payment method, Payment Reference, Id, Supplier, Customer, Comment, and Custom attributes. A 'Form Settings' dialog is open, showing a list of fields and their visibility and mandatory status. The 'Form Types' list includes 'Contact form - company', 'Contact form - person', and 'Invoice Issued form'. The 'Form Settings' list includes 'Invoice Issued Settings'. The 'Item' list includes fields like 'customer Contact Country', 'customer Contact Reg Number', 'customer Contact VAT Number', 'send To Contact Email', 'project Refid', 'due Date', 'issued By Contact Phone', 'issued By Contact Email', 'notes To Client', 'notes To Us', 'products', 'period From', 'period To', 'product Unit Price', 'product Units', 'product Total Price', 'product VAT', 'Customer name', 'Customer street', 'Customer city', and 'customer Zip'. The 'Visible' and 'Mand' columns indicate the status of each field. The 'period From' field is highlighted in blue. The 'Apply' button is at the bottom right.

Form Types	Form Settings	Item	Visible	Mand
Contact form - company	> Invoice Issued Settings	customer Contact Country	Yes	Yes
Contact form - person		customer Contact Reg Number	Yes	Yes
Invoice Issued form		customer Contact VAT Number	Yes	Yes
		send To Contact Email	Yes	Yes
		project Refid	Yes	Yes
		due Date	Yes	Yes
		issued By Contact Phone	Yes	Yes
		issued By Contact Email	Yes	Yes
		notes To Client	Yes	Yes
		notes To Us	Yes	Yes
		products	Yes	Yes
		period From	Yes	Yes
		period To	Yes	Yes
		product Unit Price	Yes	Yes
		product Units	Yes	Yes
		product Total Price	Yes	Yes
		product VAT	Yes	Yes
		Customer name	Yes	Yes
		Customer street	Yes	Yes
		Customer city	Yes	Yes
		customer Zip	Yes	Yes

Tracking Categories

Tracking Categories are used as **controlling variables** through-out the whole system, where your organization may gather some financial data, such as projects, time sheet, expenses, invoices (received/issued), orders (issued/received), estimates, etc.

There are max. **three** Tracking Categories available (Tracking Category 1, 2, 3). Tracking Categories must be set-up in general in order to start working. Once you assign one of the (root) records in Tracking Categories overview to Tracking Category 1, 2 or 3, they become available in the whole Atollon.

On the level of Folders (Clients, Prospects, Partners, ...) or Projects you may define whether or not the Tracking Category 1, 2 or 3 will be shown/hidden, optional, silent or required. Silent is work-in-progress, it should allow setting Tracking Categories automatically based on user settings in system registry.

Use Cases

Tracking Category 1 is typically used for assigning financial data, folders or project to organization's **Business Units, Teams** eg.:

Tracking Category 1 = Organization Structure

Organization Structure may contain several levels, starting by Region > Business Unit A, B, C, ...

Tracking Category 2 is typically used to set **Cost Centre**. It is also used in connection with Work Price List. It is possible to set different prices of work/labour per Tracking Category 2 (Cost Centre, Work Regime, etc.)

Tracking Category 3 is not used heavily and it is additional controlling variable, if required.

Set the Tracking Category

Create new root record, called for example "Team" and save it. Click on the newly created record (Team) and press button: "Set selected category" next to the Tracking Category 1, 2 or 3. From now, the Team option will be available throughout the whole Atollon. Repeat steps for Tracking Category 2, 3 (if needed).

Tracking Categories Settings Example

Tracking Categories

Tracking Category Settings

Add root category

Add category

Delete category

▼ Regions

China

EMEA

US

▼ Teams

Team - Cons

Team - Devs

Team - Sales

Tracking Category 1:

Regions

Set selected category

Clear

Tracking Category 2:

<not set>

Set selected category

Clear

Tracking Category 3:

Teams

Set selected category

Clear

User Teams:

Teams

Set selected category

Clear

Cancel

Save

Numbering

Numbering

Numbering settings set the Mask for any system-generated number on new Folder, Project or Estimate, Invoice, Order, etc. This Numbering mask can be assigned to Project type, for instance.

Numbering Mask

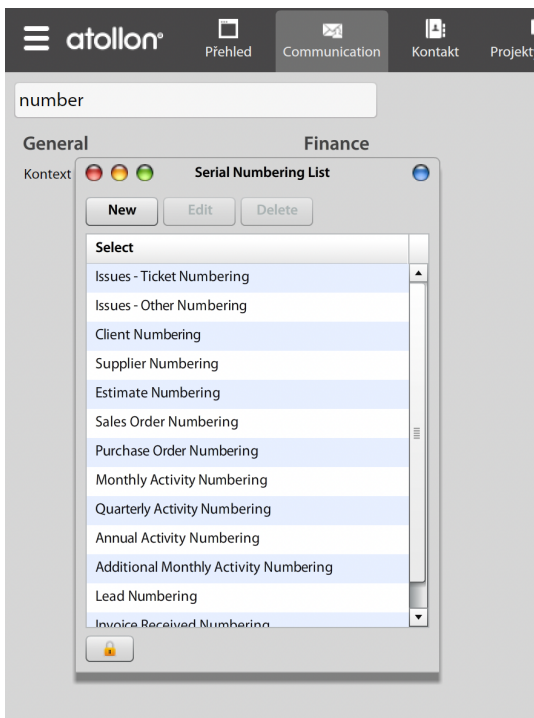
The mask is quite flexible, you can combine several system files, serial number & text strings.

For instance: "INV"YY generates the invoice number like INV110001 for the 2011 year.

S	Serial Number	Is serial selected in Serials selected, using X number of digits defined. Serials can be shared among several Numbering Masks.
YYYY	Long Year	2011
YY	Short Year	11
O	Organization Reference Number	See Settings > Organization in MS Win client.
A	Account Reference Number	Another term for "Folder" reference number.
P	Project Reference Number	Differently also "Job Number"
R	Master Project Reference Number	Number assigned to Slave Project, based on Master Project Ref. ID
U	User Number	Not applicable
M	Month	Month identifier, ie 01 for January
Q	Quarter	Quarter identifier, ie 1 for I. Q.

Edit Numbering Settings

In order to change Numbering Settings, go to: Settings -> Numbering



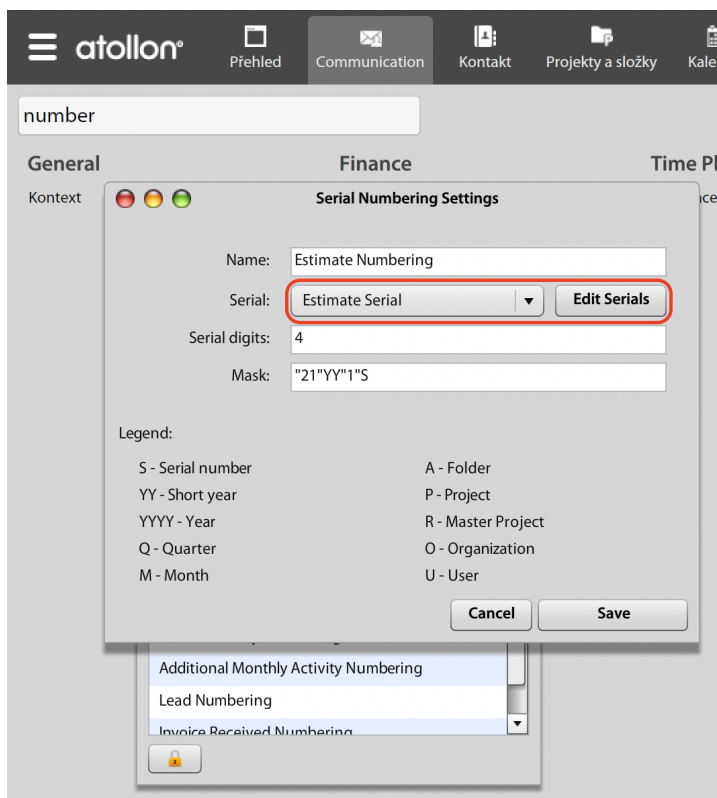
Numbering List allows you to create new numbering Mask or edit existing. When amending Numbering Mask you can set mask format and serial digits. In order to assign the Serial, go to "..." button.

Serials

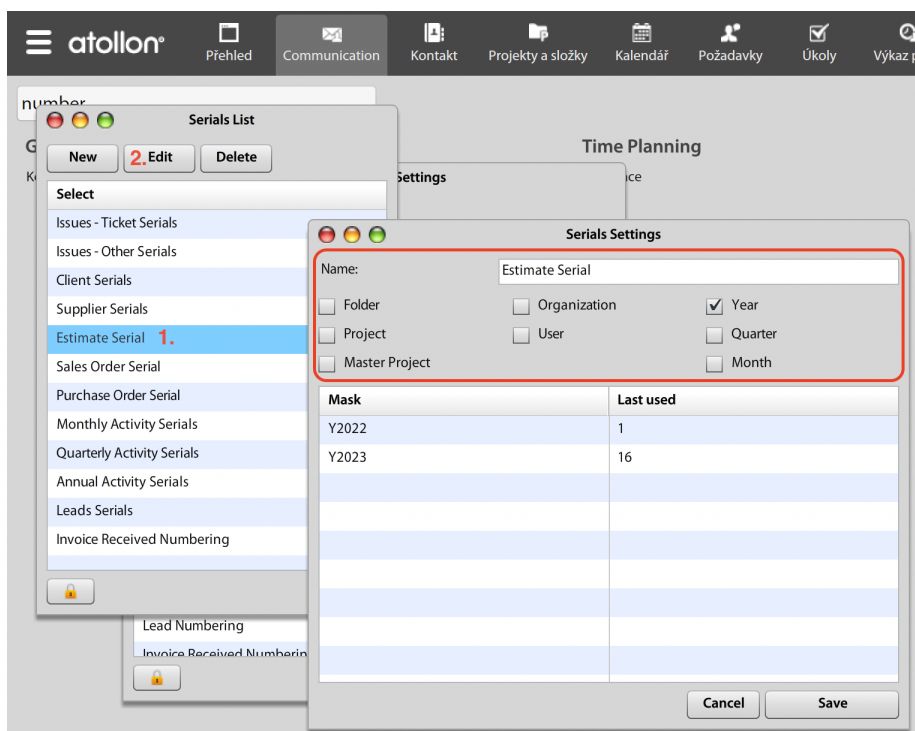
Serials are used to track last number used in Numbering. Serials allow to track several numbering sets, based on Counter Reset Criteria. You can reset the counter automatically based on Organization / Account (Folder) / Project / Master Project / Year / Quarter or Month. (User is not applicable).

Once you need to change last number used, go to Serials & amend the "Next serial" field by double-clicking on appropriate Mask row. (Please note that Next serial number displays **Last used** number in given Reset Criteria).

In order to amend Serials, go to: Settings -> Serials



The Serial list form allows you create new Serial type or edit existing. At Edit Serial you can set "clearing period".



Location, where is possible to link numbering with:

Finance: win client settings/finance/journal

Tasks: web client Options&Tools/Type of Work Settings