Folder Type Settings

This manual will show you how to create new Contact Folder Type

General

Folder is key placeholder for any data in Atollon (root) context. We usually use folders to store data about client (contact folder). Some implementations may utilise folder as root entity in case of Product (asset folder) or Construction project (simple folder).

Video Tutorial on Folder Types Settings

https://www.youtube.com/embed/RVi1mj0qYZA
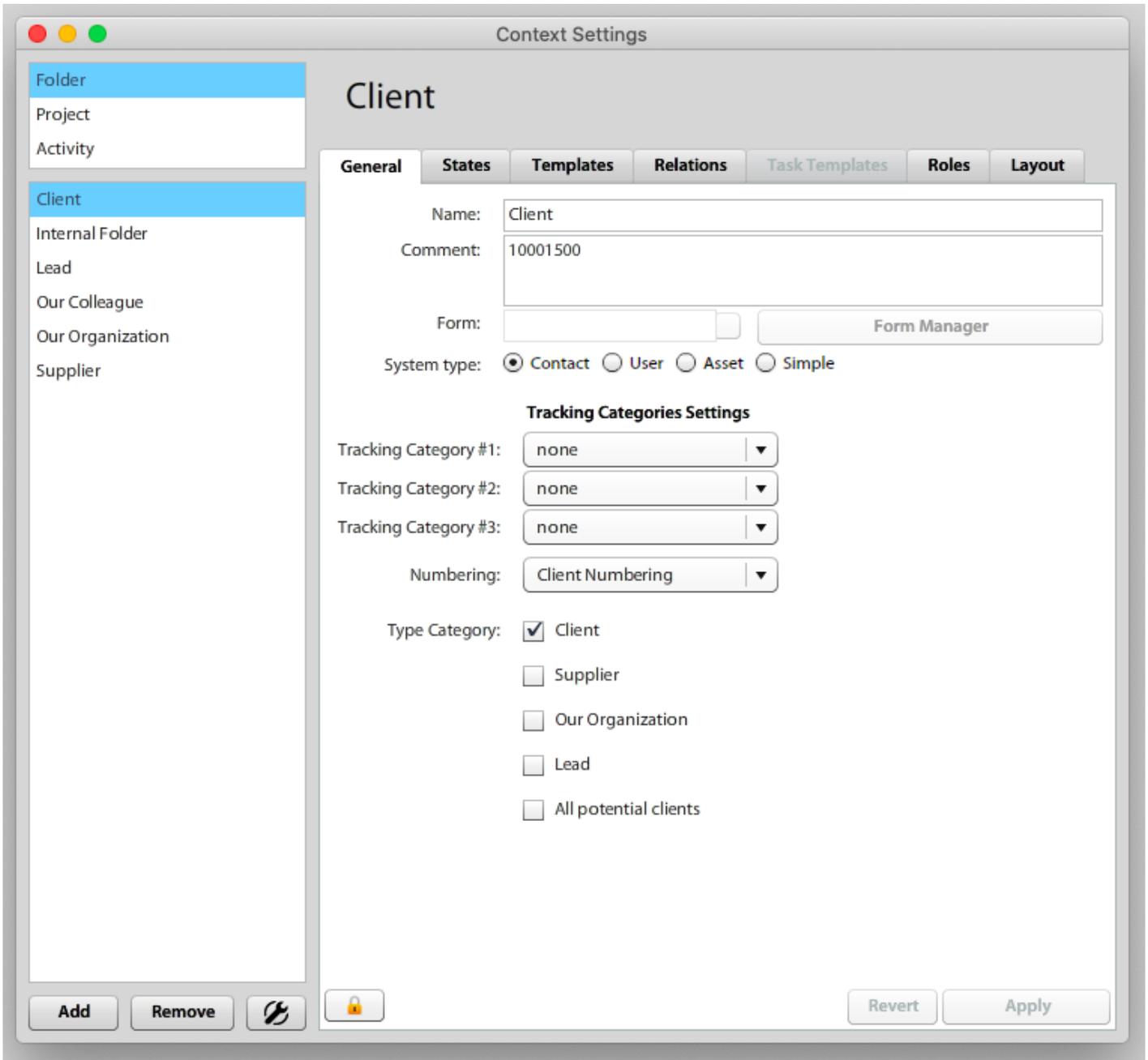
Add New Folder Type

In web client Options & Tools > Context Settings you may add new Folder Type. Click on Folders section (top left) first and press Add button below.

The newly created Folder Type is (by default) Contact Folder Type. It is possible to create different Folder Types (Simple Folder & Asset), these are customizable only using Atollon Win Client.

Foder System Types

System type	Explanation
Contact Folder	Folder that is used to track all activities of any **contact** - **person** or **company**
User	Contact folder that may also create user account in the system (this must be setup in Folder Template)
Asset	Folder that tracks any activity regarding **Product**

Simple	Just a folder that may mean anything - it is used mainly to share documents and other company data

Folder Categories

Folder categories are used to group various types of folders together. Some examples may be found in the table below:

Folder category	Explanation
All clients	All folder types that may represent clients (Leads, Prospects, Clients, Customers, Partners, etc.)
Suppliers	All folder types that are available in invoicing on supplier side (Supplier, Partner, etc.)
Our Organization	All folder types that may be (in invoicing) on the side of provider (Our Organization)
...	

Forms

Custom form that is bound to Folder type should represent any data that are specific to given folder type (you may track something else when you deal with Leads, something else you will track with current Clients, etc.

Tracking Categories

You may set whether tracking category (Teams, Product Categories, etc.) will be set on the Folder level (either optional or required).

Numbering

You can set new Folder numbering. The Numbering settings will pre-define what number will the new Folder have.

Folder States

Select or Create Folder States (Client Life Cycle)
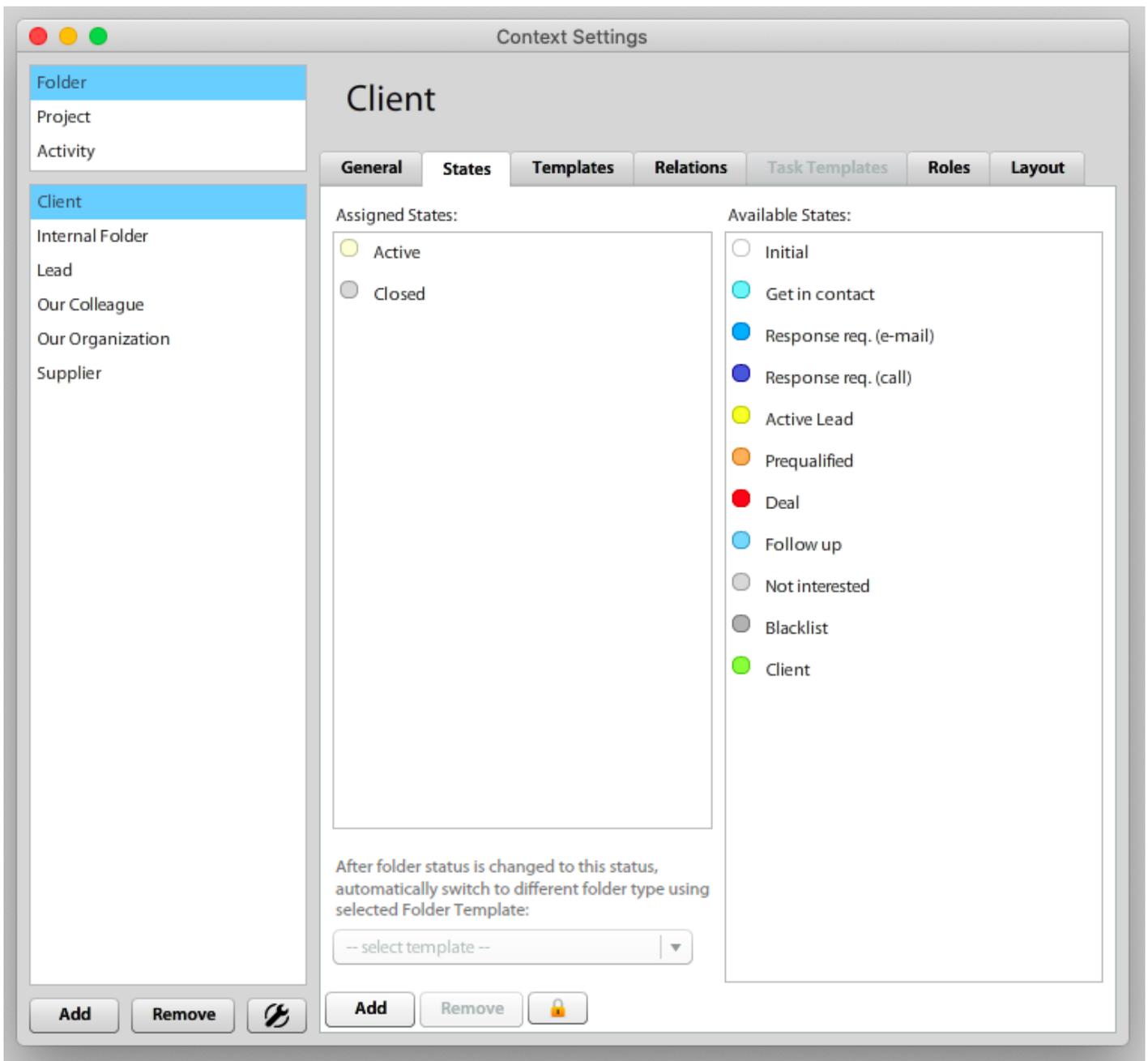
You should drag & drop at least one of the **Available States** to **Assigned States**.

Each state must be assinged to one of the "fixed" states: Initial, Active or Closed. Contacts in Closed state will (by default) not appear in Finder, they will be archived/filtered.

Conversion of folder types

You may setup that once the folder changes it's status (for example **Lead** contact will become a **Client**), you may change the folder type (ie from **Lead** to **Client**).

To do it, simply create new Folder status (ie "New client") and assign it to the folder, together with target Folder Template. Once your folder reaches desired status, it's type will change according to assigned **Folder Template**.

Folder Templates

Create Contact Folder Type's Template

In order to enable users creating new Folders, there must at least one Folder Template exist that is allowed to be created in Root. Folders may also be created under different folders (as sub-folders). In such case, you must set-up **Relations** of the parent folder type and allow sub-folder (by their Folder Templates).
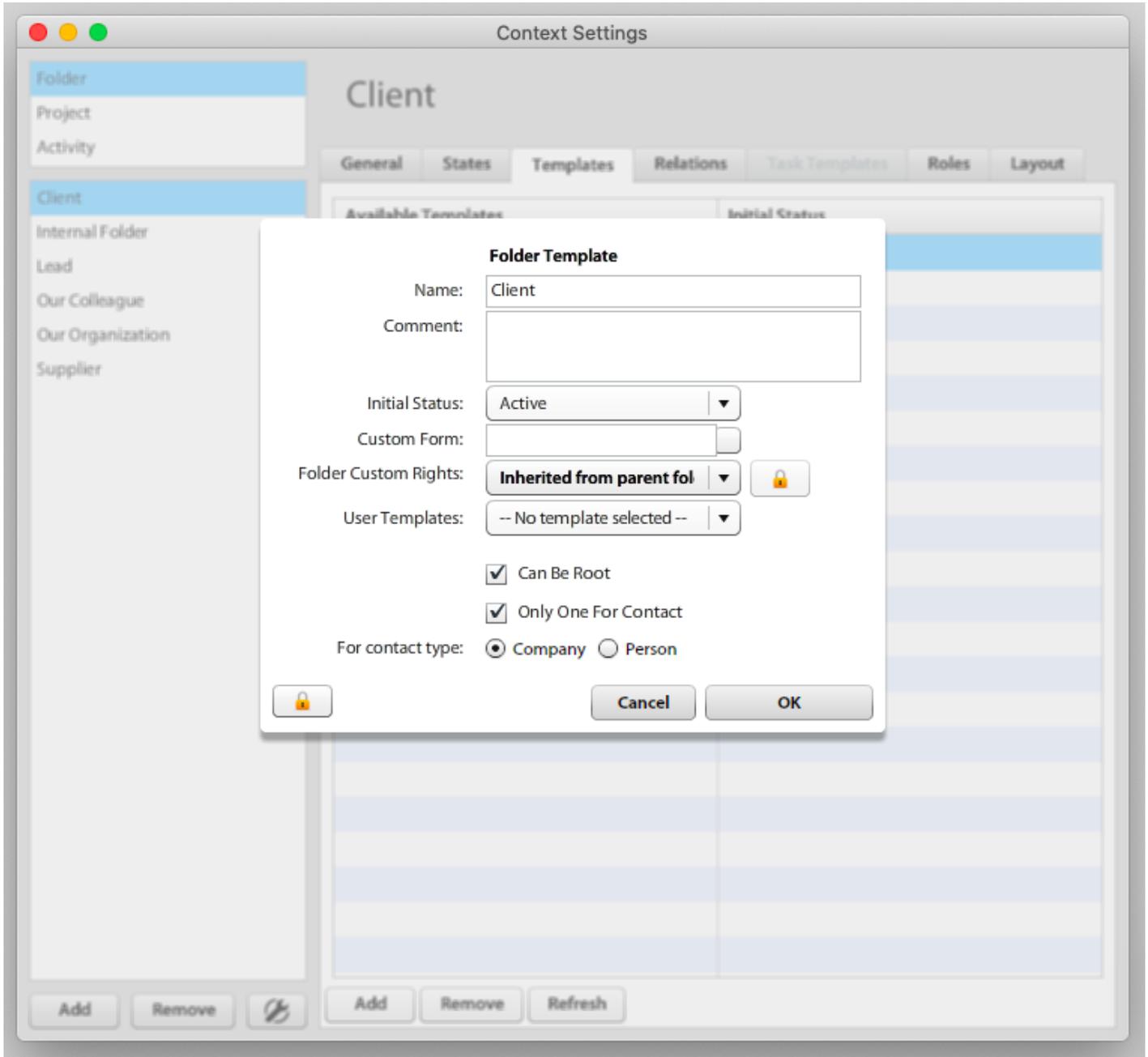
There must be at least one Contact Folder Type's Template. Usually it's name may be the same as the Folder Type Name.

When editing the Folder Template, you must select Initial Status.

Check "Can Be Root" to enable this Folder Template to be used in root level of Finder.

Check "Only One For Contact" to disallow creating several Folders of the same Type per one Contact.

Set Dimension: This may be used to pre-set controlling variable of the Contact based on this Folder Template.

Additional Folder Template Attributes

You will need to adjust the following additional attributes for Contact Folder Template:

1.) Go to menu: Settings > Account & Project > Account Templates
2.) Select & open newly created Contact Folder Type's Template
3.) Select Form (in Case you want a Custom Form to be used for each new Contact based on the same Template
4.) Select Contact type: Person or Company (select what contact will be created, when creating new Contact directly from Finder)
5.) User Template: select based on which User Template the user will be created (once the Person or Company should have access to your Atollon)
6.) New subject rights: Access Rights Customization (only if you want to customize Access Rights to all Contact Folders created based on this Contact Folder Template)

Roles

Folder types may have set-up internal or external roles. There are the following reasons to do this:

1. **Reporting** - you know, who's in charge for the client / lead / partner etc.
2. **Workflow** - you may assign tasks based on user roles assigned to folder type (lead / client / partner) etc.
3. **Access rights** - assigning user to role on folder means for example "Give sales representative permission to access client's details".

Roles as access rights

You must pre-define access rights on Folder Temlate. This must be done BEFORE the folder is created. Access rights to roles must be present on the given folder before the user is assigned the role. (This is something we may consider to improve in the future and allow modification of role rights once the user is being assigned).

Layout

You must create or assign any existing Folder Layout (we call it Activity Panel). The Folder Layout may be assigned to various **layout (GUI) presets** (ie Professional, Standard, Core) which are then associated to **user profiles** (Manager, Sales Rep, Admin, etc.)

Documents

You may add one or more document or e-mail templates to create Client's profile, Applicant's or Employee's profile, etc.