

Print and document generation

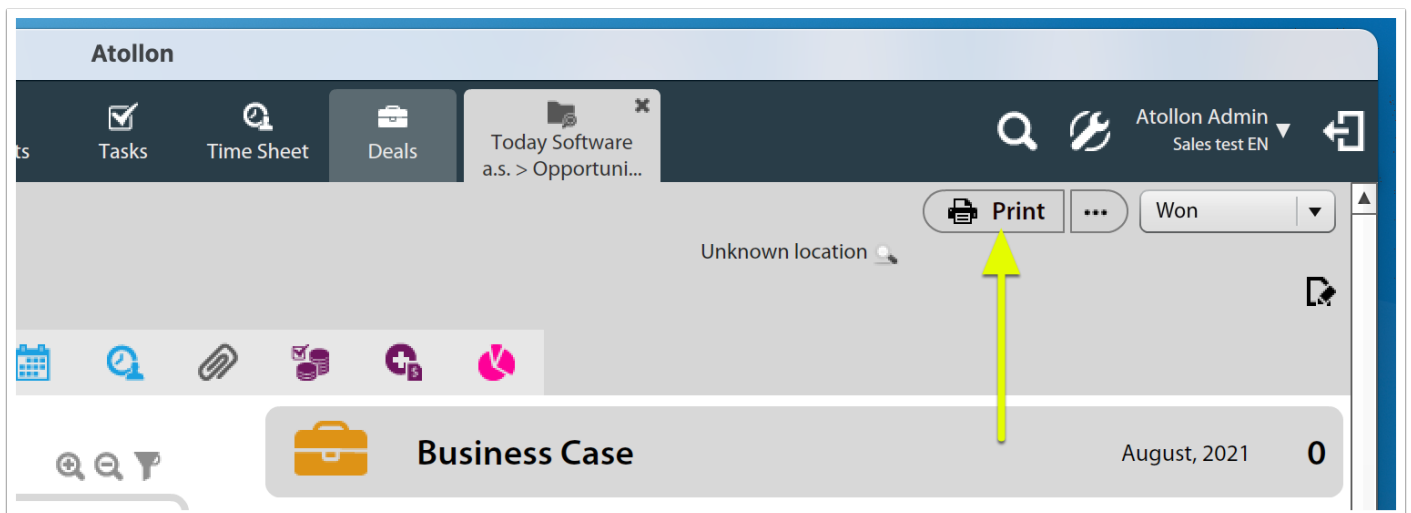
Print tool for users

From users perspective, print dialog allows generating and distributing documents from Atollon using e-mail or internal communication, or just storing into the context or generating for printout.

Print any context data

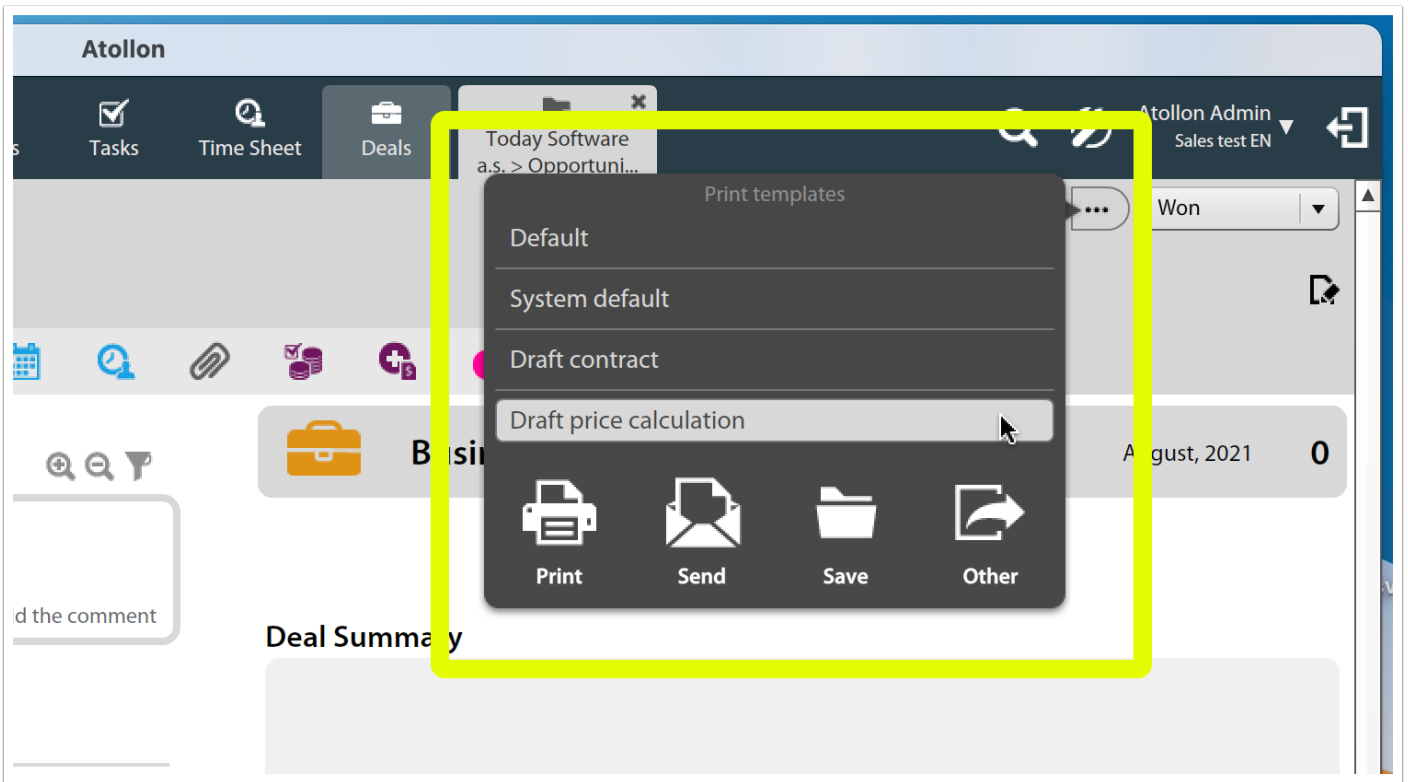
This function allows you printout detail of your client folder, deal / contract / project detail or service / other activity detail.

Generic printouts contain basic context information (name, description, contacts, etc.) It is possible to prepare custom template that will printout whatever you need that is available on context.



The Print button shows last used function (Print, Send or Save to context). This print generates default document, which can be either system default (Atollon's own) printout or your custom document.

Using (...) button you may see more options ...

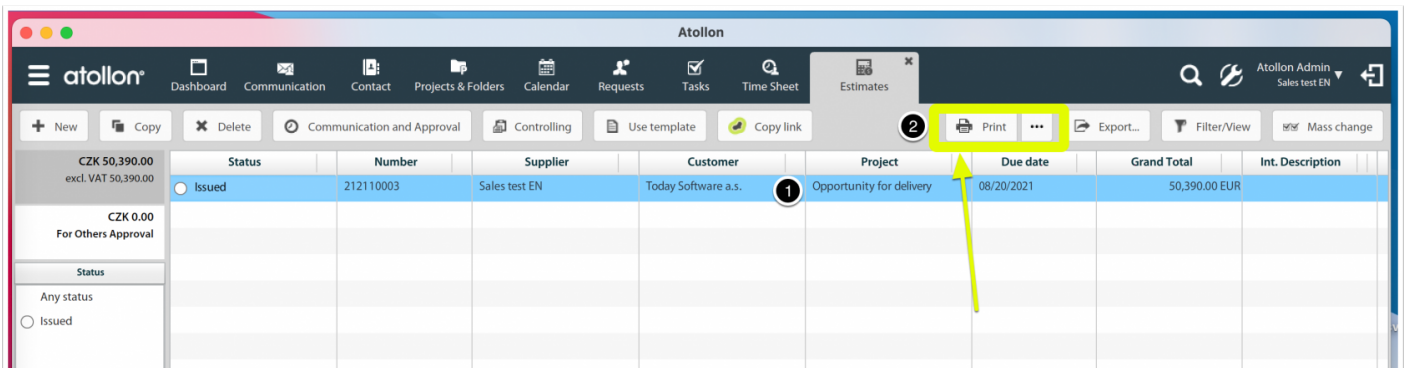


Print templates options allow you to select which document you want to generate and/or send. E-mail template may be attached to the document template or the whole print dialog may only present the E-mail template (without document). That will help you speed-up next steps when dealing with clients, deals or any other activities ...

Print invoice-based documents

Similar print/e-mail dialog may be found on your estimates, orders or invoices.

Example: print from Estimates overview



Example: print Estimate detail

Estimate - Ref.Id.: todso

Estimate

Context: * Today Software a.s. Opportunity for delivery

Status: * Issued

Number:

External number:

Journal: Estimate

Currency: EUR 1

Issued date: 08/06/2021

Valid until: 08/06/2021

Id: todso

- Supplier: Sales test EN, City, Country
- Customer: Today Software a.s., Brno, Czech Republic
- Comment:
- Custom attributes:

Name	Unit Price	Qty.	VAT	Amount	incl. Tax
1. Digital Alarm Clock	590.00 EUR	1	none	590.00 EUR	590.00 EUR
2. Artistic writer's table	49,800.00 EUR	1	none	49,800.00 EUR	49,800.00 EUR

Total: EUR 50,390.00

Print templates

- Default
- System default

Attachments: +

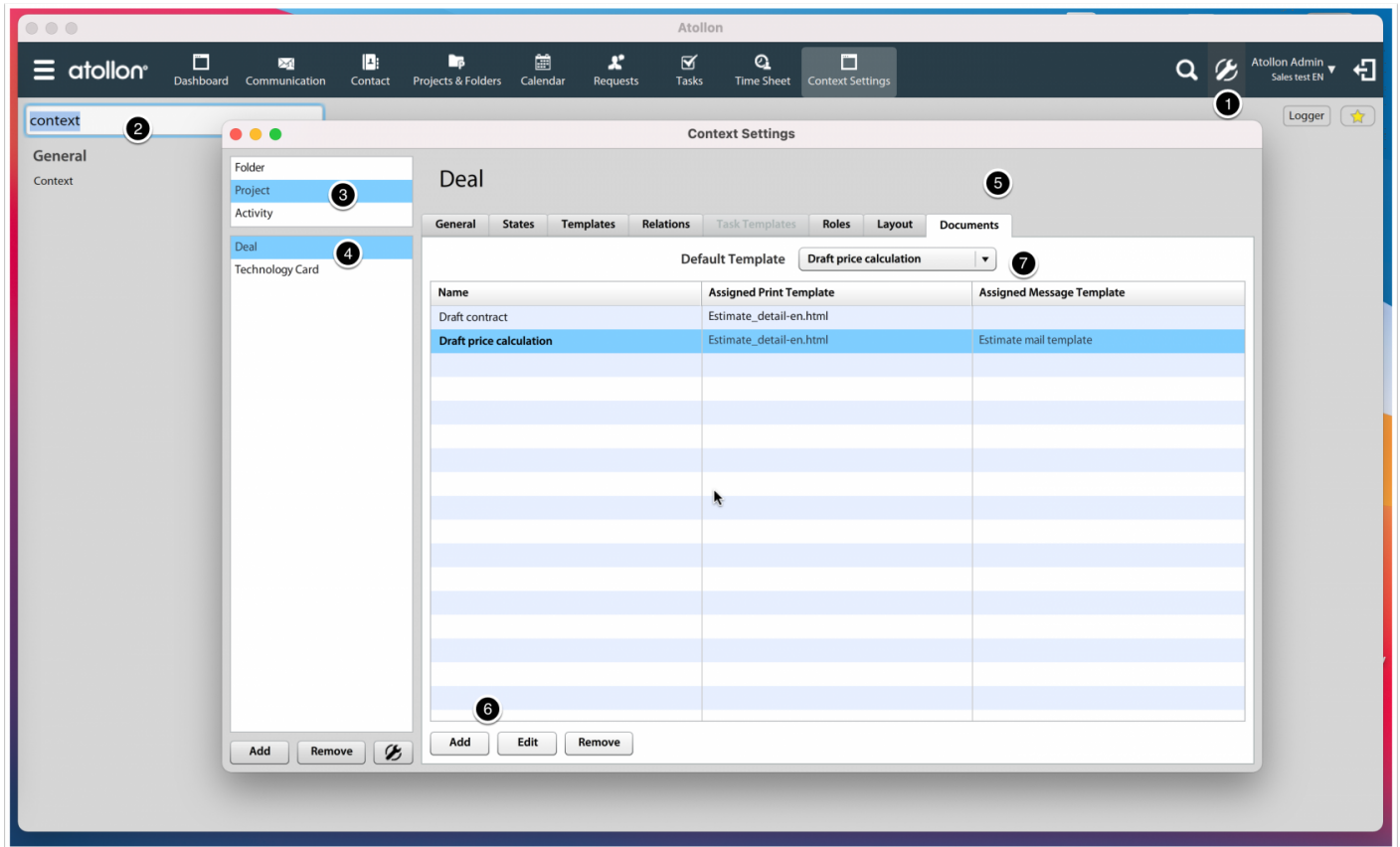
Print Send Save Other

Send for approval... Approve Cancel Apply OK

Print tool Configuration

Context-based prints

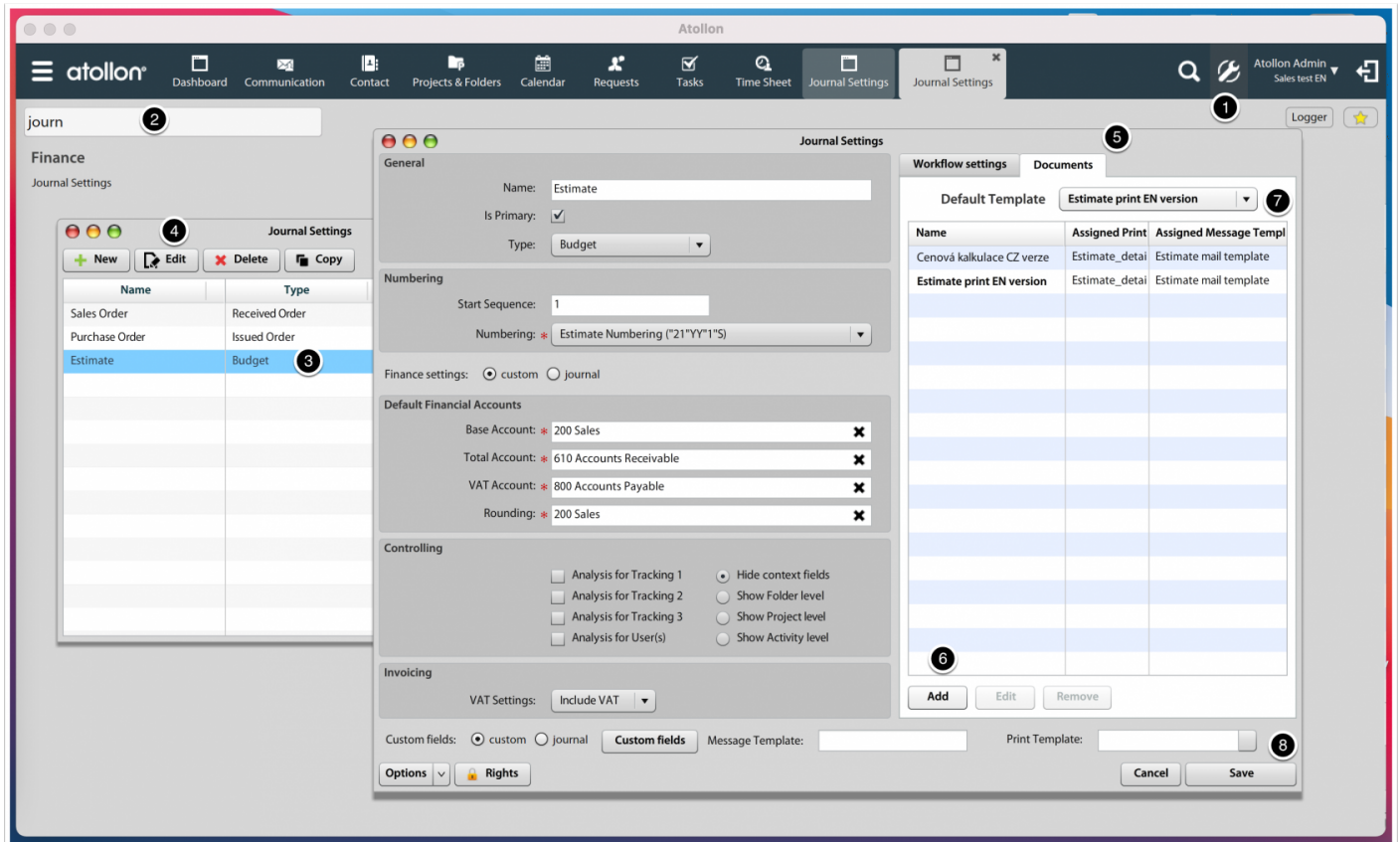
Example: set-up document / print templates for **Deal** detail. The screen below shows example on how to setup document / print / e-mail templates for Deal detail - these may include draft price calculation (from Deal items & value) or any administrative Deal document - such as draft contact.



1. Open **Options & Tools**
2. Find **context**
3. Select **Project** (configuration)
4. Select project type (ie **Deal**)
5. Select **Documents** tab // here you may add/remove document/print/e-mail templates for selected project type
6. Add new document template (such as your MS Word template that will generate draft contract)
7. Select which document will be default // default document is the one you would generate when you press on **Print** / **E-mail** or **Save** button (other templates may be selected by (...) option)

Invoice-based prints

Example: set-up new templates for sending Estimates to your clients.



1. Open Options & Tools
2. Find journal
3. Select which journal you want to configure (ie Estimate)
4. Press Edit button
5. Select Documents tab
6. Add new template (such as any XHTML Django-based file that will get PDF output or MS Word, MS Excel template)
7. Set default document (the one used directly when printing / sending / storing) using the Print dialog (described in user section above)

Supported document templates

PDF output

In order to generate PDF output, you need sample XHTML template. These may be gathered from Atollon consultant or designed by your HTML web coder.

Templates are using Django-based syntax to add data from Atollon.

MS Word

Any MS Word document template (docx) may be used. Please consult with your Atollon consultant to provide you with a samle for your needs.

MS Excel

Any MS Excel file (xlsx) may be used as template for document generation. Samples are available only for Estimates / Invoices.

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