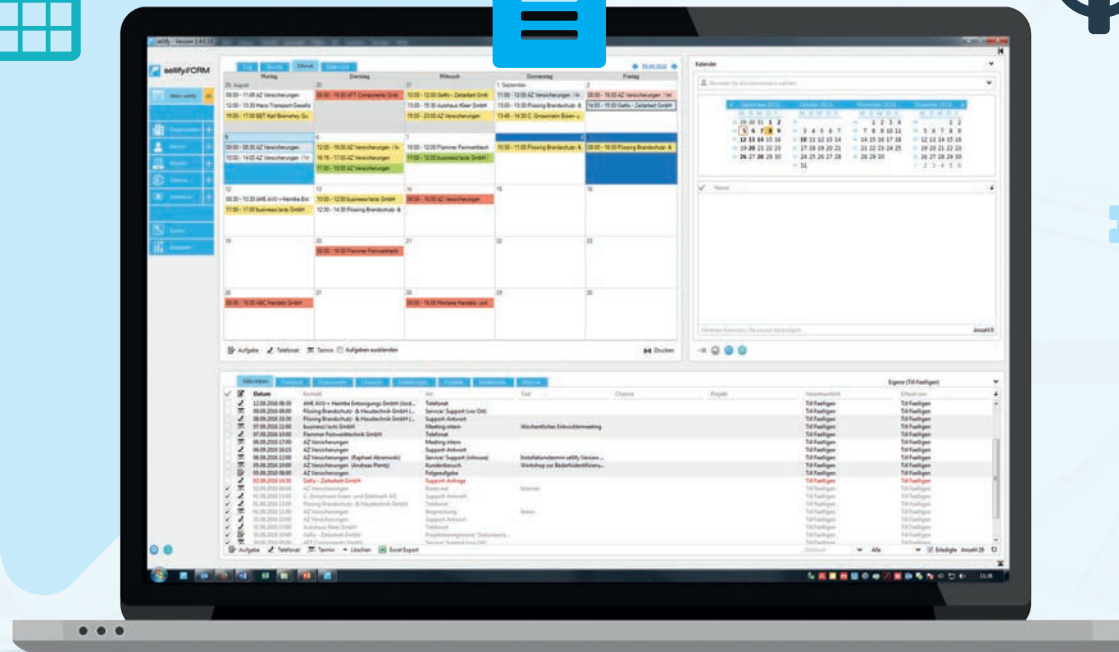




Changelog – What's new?

Release 3.0 – New features, improvements, bug fixes





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3.0

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
General

Keyboard shortcuts and tab control



In addition to the introduction of shortcuts for the general control of sellify, as of sellify 3.0, data entries in edit mode using tab controls  also provide a significant improvement in the operation of the entire application. The shortcuts are displayed in tooltips at the appropriate places. A complete view of the keyboard combinations can be called up in [sellify](#) under F1.

Tab-controls:

You can move forward or backward the individual fields with TAB and SHIFT+TAB. For fields that have an advanced input option (phone, e-mail), the active hyperlink is underlined and you can open it by pressing ENTER. (1) With ALT+arrow key / you can change the order (2), with ALT+DEL you can delete a selected line. In areas with multiple assignments (responsible, contact type, industry) you can move the selected entry by pressing ALT+arrow key /. (3)

Use the space bar to activate/deactivate a checkbox.

General

Keyboard shortcuts and tab control (Extract)



Main navigation

	Search	Switch to map (CTRL)	Create new (CTRL + ALT)
Organization (F6)	F6	CTRL + F6	CTRL + ALT + F6
Person (F7)	F7	CTRL + F7	CTRL + ALT + F7
Project (F8)	F8	CTRL + F8	CTRL + ALT + F8
Opportunity (F9)	F9	CTRL + F9	CTRL + ALT + F9
Selection (F10)	F10	CTRL + F10	CTRL + ALT + F10
My sellify (F11)	F11	CTRL + F11	

Navigation

CTRL + TAB STRG + SHIFT+ TAB	Toggles the map view tab to the right/left
CTRL + Space STRG + SHIFT + Space	Toggles the archive view tab to the right/left
ALT + ↓ ALT + ↑	Switches to the next/previous map view in navigation
ALT + → ALT + ←	Scroll alphabetically right/left / next day, week, month (disabled in edit mode)
SHIFT + ALT + → SHIFT + ALT + ←	Alphabetically scroll right/left at person + opportunity within the linked organization.
ALT + A	Switches to the archive view activities
ALT + D	Switches to the archive view documents
ALT + F6	Switches to the archive view relationships (organization + person), project members (project), collaborators (opportunity).
ALT + F7	Switches to the archive view person (organization), relationships (person), project members (project), participants (opportunity).
ALT + F8	Switches to the archive view projects
ALT + F9	Switches to archive view opportunities
ALT + F10	Switches to the archive view selections (organizations + person)
ALT + F11	Switches to the history archive view

New data set

CTRL + N	Adds a new record for the active tab of the map view
Task (1)	CTRL + ALT + 1 CTRL + ALT + NumPad1
Call (2)	CTRL + ALT + 2 CTRL + ALT + NumPad2
Appointment (3)	CTRL + ALT + 3 CTRL + ALT + NumPad3
Activity (type selection)	CTRL + ALT + A CTRL + ALT + NumPad0
Document	CTRL + ALT + D

In edit mode (New and Edit)

TAB CTRL + TAB	Moves to next field Moves to previous field
ENTER	<ul style="list-style-type: none"> In the case of a hyperlink (address, telephone, e-mail, etc.), the input mask opens. In case of a list, the marked list entry is taken over Long text: line change (to leave you have to press TAB) Buttons: Executes the respective action
Arrow down	<ul style="list-style-type: none"> For a list field, the list is opened In the case of a date field, the date input is opened With a search field the selection list is opened With the hyperlinks telephone, e-mail, etc. the input mask is opened and the first data record is marked.
Text input	<ul style="list-style-type: none"> With the hyperlinks telephone, e-mail, etc. the input is taken over into a new entry. In the case of a search field, the entry is searched for. In the case of a list field, the list is searched
Space	Enables/disables checkboxes
ESC	<ul style="list-style-type: none"> Ends the input without saving. Closes an input mask. Closes an open list
CTRL + Q	Mail lock on/off (organization and person)
CTRL + B	Contact block on/off (organization)
CTRL + T	Completed on/off (project, opportunity and selection)
For MultiEdit, hyperlinks (email, phone, fax, website):	
ALT + Arrow up/ down	Moves the rank of the selected entry
ALT + ENTF	Deletes the selected entry

General

CTRL + F	Calls the search dialog (active tab depends on current map view)
CTRL + R	Calls the analysis dialog
CTRL + P	Calls the print preview for the current map view
CTRL + SHIFT + P	Calls the alternative print preview for the current map view (weekly view calendar)
CTRL + E	Switches to the edit mode in the active main area (Edit)
CTRL + S	Save
CTRL + N	New record of the active map view
ESC	Cancel the input and closes the active dialog.
TAB	Moves to the next field
CTRL + TAB	Switches to the previous field
CTRL + D	Favorite on/off
CTRL + O	Switches to the calendar view of the current day.
CTRL + SHIFT + O	Switches to the calendar view of the current day & exits the assistance mode.

General

RichText formatting for text entry



The screenshot shows the 'business//acts GmbH' profile page. The main text area contains a warning: **ACHTUNG: Textentwurf!** followed by a paragraph of text. Below the text is a large image with the text 'In Kundenbeziehungen investieren'. A context menu is open over the text, showing options like 'Akkumulation', 'Ignorieren', and 'Rechtschreibprüfung...'. Below the text area is a table of contacts.

Nachname	Funktion	Position	Telefon
Hose	Geschäftsführer		+49 221 9959
Lemacher			+49 221 9959
Blichmann	Assistenz Geschä...		+49 221 9959
Goriss-Kanters	Referentin der Ge...		+49 221 9959
Brandt	Marketing		+49 221 9959
Brammertz	Senior Software E...		+49 221 9959
Jahn	Software Entwick...		
Wolffinger	Software Entwick...		
Kaes	Senior Consultant		+49 221 9959
Prothmann	Senior Consultant		+49 221 9959
Böhm	Technischer Bera...		+49 221 9959
Fälligen	Technischer Bera...		+49 221 9959
Baum		Einkaufsleitung	

The screenshot shows an activity dialog for 'business//acts GmbH' on Friday, 05.01.2018. It includes a calendar view, service details (Start/Ende, Dauer, Erinnerung, Wiederholung), and a note. The note contains a shopping list and a diagram.

Service Details:
 Start/Ganztägig: 05.01.2018 15:08
 Ende/Dauer: 05.01.2018 19:08 (4h 00m)
 Erinnerung: Nicht gesetzt
 Wiederholung: Keine Wiederholung

Organisation: business//acts GmbH
Person: Prothmann, Stefan (business//acts GmbH)

Notiz:
 Einkaufsliste Weihnachten:
 • Gans
 • Geschenke
 • Girlanden
 • Becher
 • Bier
 • Wein
 Für Montag muss die Wandhalterung erneuert werden - Rolf anrufen!

Thema 1: Auslastungsmatrix

	Team Alpha	Team Beta	Team Gamma
Eingang	6	8	12
Ausgang	11	3	21
Übergang	2	26	

Thema 2: Versuchsbeschreibung
 Die Versuchsanordnung gewährleistet Überhitzungsschutz und Spannungskonstanz!

In sellify you can now save the most important long text fields in RichText format with, among other things, text alignment and size or color, bullets, tables and graphics.

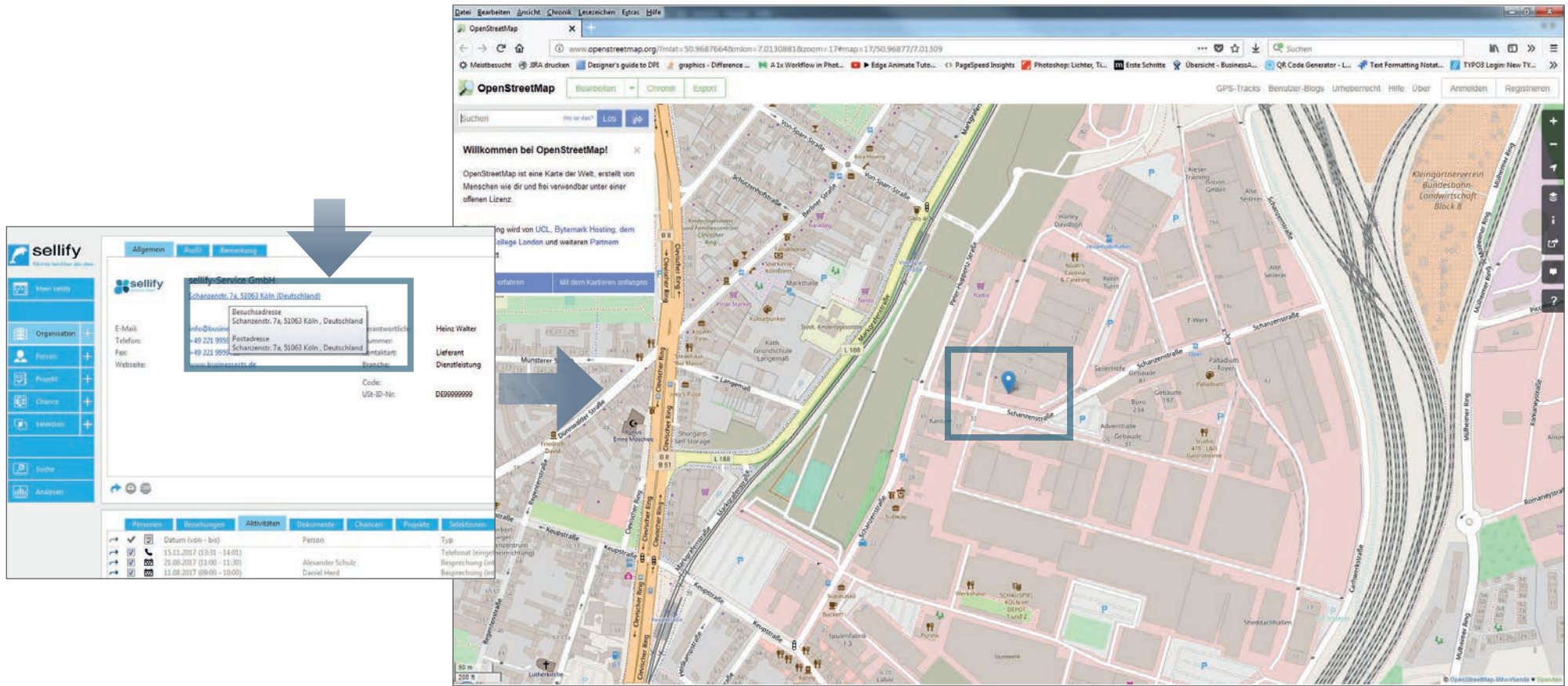
You can apply the format assignments via the toolbar placed above the respective text field and via the context menu. In addition, you can now insert formatting from other programs and even images from your clipboard.

In addition to formatting, the text entries are checked for spelling errors and then underlined in red way. Possible corrections are offered via the context menu.

In activity dialogs, the description field between type and location is now omitted accordingly.

General

Integration of OpenStreetMaps for address links



In sellify 3.0, a map view or route planning is now also available.

If you click on the hyperlink of an address at a person or organization in view mode, the respective address opens in OpenStreetMap in your browser.

General

Unification of context and option menus



The image displays four screenshots of the sellify CRM interface, illustrating the unification of context and option menus across different views:

- Screenshot 1 (Left):** Shows the 'Allgemein' (General) tab for 'AZ Versicherungen'. A context menu is open over a table of records, with a blue arrow pointing to the menu. A circled '1' is next to the menu.
- Screenshot 2 (Middle-Left):** Shows the 'Personen' (Persons) tab. A context menu is open over a table of records, with a blue arrow pointing to the menu. A circled '2' is next to the menu.
- Screenshot 3 (Middle-Right):** Shows the 'Beratung' (Consulting) tab. A context menu is open over a table of records, with a blue arrow pointing to the menu. A circled '3' is next to the menu.

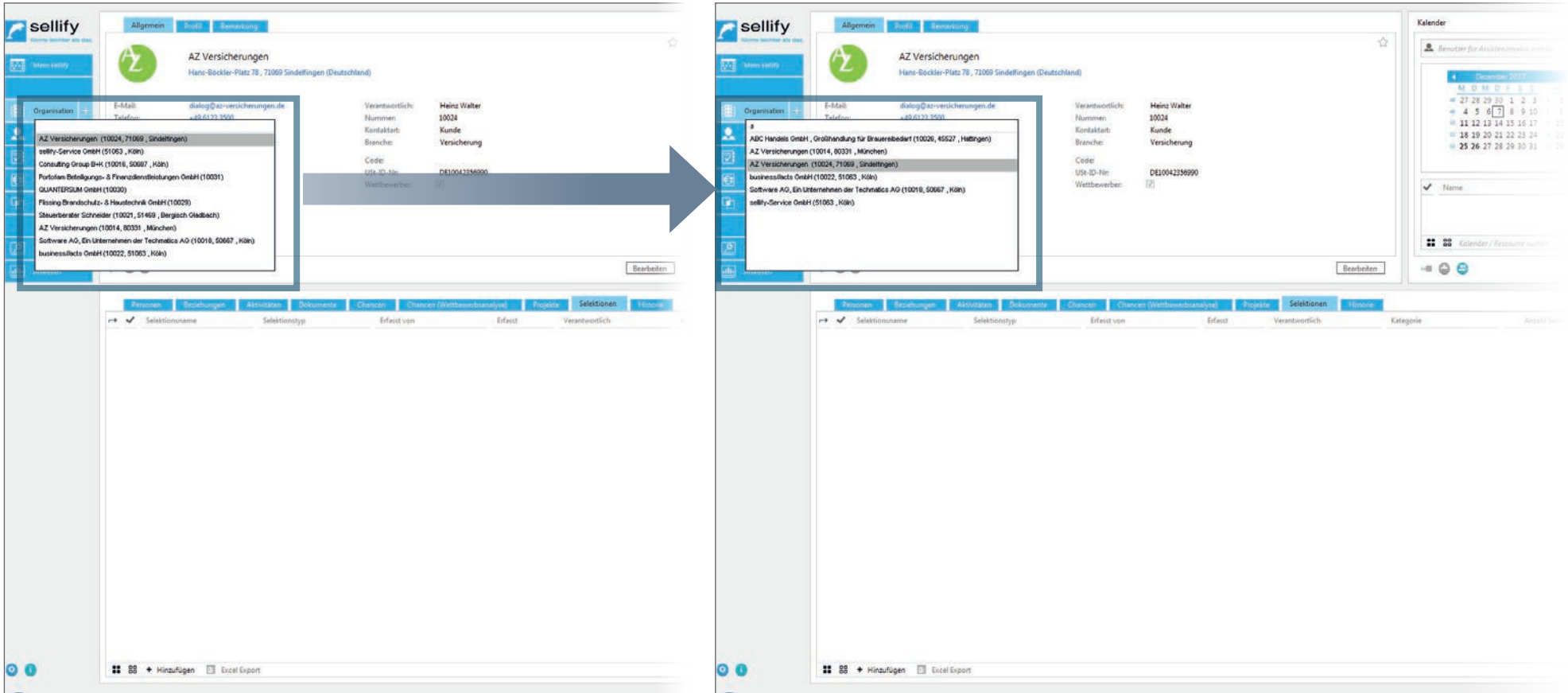
The entries in context menus of map and archive views (left-click on multitask arrow  in maps (1) and right-click in archive views) have been unified and restructured.

Newly added here is the option to set (also several) selected records to Done or Undone (all tabs except Persons and Relationships). (2) The right-click context menu can now

be used to copy the contents of the clicked cell (active row of the respective column) to the clipboard. (3)

General

Enhancement of SQL Server supported quick search



The quick search function has been further enhanced for sellify 3.0, replacing the previously available search function.

The quick search in the main navigation for organizations, people, opportunities and projects now runs completely via SQL Server full text search. The setting option "Use SQL-Server supported quick search" in sellify//admin has been removed accordingly.

Search performance has been significantly improved when combining text and numeric values. The links in opportunities now also use the quick search.

General

Display of totals for multiple selections in archive views



The screenshot displays the 'sellify' CRM interface. The top left shows the 'AZ Versicherungen' contact profile with details like email, phone, and website. The main area is divided into two panes. The left pane shows an 'Archive' view with a list of records. A tooltip is visible over the selected records, showing a summary: 'Summe markierte Zeilen: 10 x Brief, 3 x Eing. Dokument, 3 x Email (ausgehend), 2 x Email (eingehend), 2 x Memo'. The right pane shows a 'Calendar' view with a monthly calendar for 2017 and 2018. Below the calendar is a table with columns: 'Stufe', 'Person', 'Typ (Chance)', 'Wiedervorlage', 'Verantwortlich', 'Projekt', and 'Betrag'. The table contains several rows of data, with a tooltip over the 'Betrag' column showing a sum: 'Summe markierte Zeilen: 27.800,00 €'. The bottom right corner of the interface shows 'Erfolgte anzeigen Anzahl 5/11 (06.376,00 €)'.

If several records are selected in an archive view, a grouping/number or sum is displayed in the tooltip for the respective columns of the types Lists, Responsible and Numeric values.

General

Extension of the assistance mode



The screenshot displays the sellify interface. At the top, there's a navigation bar with 'Tag', 'Woche', and 'Monat' tabs. Below it is a calendar view for December 2017. The main area shows a list of activities with columns for 'Datum (von - bis)', 'Kontakt', 'Typ', 'Beschreibung', 'Chance', and 'Projekt'. A dropdown menu is open over the 'Projekt' column, showing a list of filter options including 'Alle', 'Eigene und ausgewählte Kalender', 'Eigene & Heinz Walter', and 'Eigene Firmenstruktur'. The interface also includes a sidebar on the left with navigation icons and a top-right area with a user profile for 'Heinz Walter'.

The assistance mode function has been extended. Thus, as of sellify 3.0, there is another filter option in the archive view and you can now display your own records in addition to the records of the person for whom you are currently performing the assistance.

The dropdown entries for the filter options of the archive view have been adapted accordingly for this purpose. To do this, click on the filter dropdown as usual and select 'Own' and 'Last Name, First Name'.

This new filter option replaces the previous filter option 'Own'.

General

Various



Improvement of Outlook plugin distribution for installations & updates: A new version of Outlook plugin can now be distributed via sellify's default update mechanism - the Update Tools. An open Outlook is detected and the user is asked to close the program so that the installation/update can be completed.

Edit mode when opening dialogs: All dialogs of the main entities (organization, person, project, opportunity, etc.) now open in edit mode by default. As a user, you thus do not have to switch from view mode to edit mode first and can instead start editing directly after opening the dialog.

Reminder for activities: The limitation of the reminder to 22 days is removed.

Optimization of record linking: The filter settings "Show completed" and "My" are handled independently of each other in link dialogs for activities, documents, opportunities and projects. A set filter setting for document links is therefore not automatically set for activity links as well.

Automatic addition of new tabs after updates: New tabs will be available automatically after a sellify update in the future. Previously, sellify users had to add them manually via the column configuration.

The **date control has become intelligent with sellify** and can now interpret the following inputs: Input "20" = "11/20/2017" ("input" + ".this month.this year") | input "20.01" = "20.01.2017" (this year added) | Input "h" = "11/30/2017" (h = today)

Start time for activities: If you are not in the calendar view, then "Now" is always entered as the start time for new activities. Only in the calendar view, the date active there should be taken over, which was previously the case everywhere.

sellify//admin - database connection: sellify//admin automatically takes over the defined database connection from sellify.

User authentication: Regardless of the setting in FormsAdmin, AD authentication with password authentication is always used as fallback for user authentication. If the SHIFT key is held down when starting sellify (or sellify with command line parameter -forcelogin), the password prompt appears.

My sellify - Calendar and resources

Display of holidays in the calendar



The screenshot displays the sellify calendar interface. The main view shows a weekly calendar for December 2017. A compact view calendar is shown in the top right, and a detailed activity view is open in the center. The activity view shows a holiday on Monday, December 25, 2017, from 08:00 to 18:00. The holiday name is "Achtung Feiertag (Erster Weihnachtsfeiertag)" and the organization is "AZ Versicherungen".

Start/Ganztägig:	25.12.2017	08:00	
Ende/Dauer:	25.12.2017	18:00	10h 00m
Erinnerung:	Nicht gesetzt		
Wiederholung:	Keine Wiederholung		

Organisation: AZ Versicherungen

The German holidays are now displayed in sellify. In the individual calendar views, the calendar day is displayed in red font and the holiday name in brackets. Holidays are also highlighted in the compact view calendar.

The holidays are first determined by the user's organization using the zip code of the visiting address. If this is not available, the postal code of the postal address is used to determine the holidays.

If a user enters an appointment on a holiday, the conflict graphic with the corresponding tooltip for the holiday is displayed as a warning.

Organizations, people, projects, opportunities, selections

Dynamic adaptation of the address line



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Fax: +49 221 4567890
Webseite: www.softwareag.de

Verantwortliche: Heinz Walter
Nummer: 10018
Kontaktart: Diverse
Branche: Dienstleistung

Code:
US-ID-Nr:
Wettbewerb:

Anrede	Vorname	Nachname	Funktion
Herr	Sascha	Meyer	Geschäftsführung
Herr	Peter	Landshut	Softwareentwickler
Frau	Marie	Schwarz	Softwareentwicklerin
Frau	Petra	Burke	Marketing Associate
Frau	Louisa	Winkel	Vertriebs-Leiterin

sellify-Service GmbH
Schanzenstr. 7a, 51063 Köln (Deutschland)

E-Mail: info@businessacts.de
Telefon: +49 221 999920
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Webseite: www.businessacts.de

Verantwortliche: Heinz Walter
Nummer:
Kontaktart: Lieferant
Branche: Dienstleistung

Code:
US-ID-Nr: DE99999999

Anrede	Vorname	Nachname	Funktion
Herr	Heinz	Walter	Geschäftsführer
Herr	Alexander	Schulz	Geschäftsführer
Herr	Daniel	Herd	Geschäftsführer
Herr	Dominik	Kohler	Vertriebsleiter
Herr	Fabian	Borchert	Projektmanager
Herr	Lukas	Schmeltzer	Marketingleiter
Herr	Niklas	Zuther	Controller
Herr	Sebastian	Pfeifer	Softwareentwickler
Herr	Tino	Jenniges	Service-Techniker
Herr	Tom	Langer	Qualitätssicherung
Frau	Marina	Pfefferkorn	Buchhaltung

The map view for organizations and persons has been extended by a dynamic adjustment of the address line in view mode. This gets its distance to the previous element automatically if no 2nd name line has been entered for an organization or a person has not saved a link to an organization.

Organizations, people, projects, opportunities, selections

Duplicate check



1

2

3

Organisation	PLZ	Ort	Land	Verantwortlich
businessacts GmbH - Repräsentanz Hamburg	20097	Hamburg	Deutschland	Andreas Goertz
businessacts GmbH - REISEKOSTEN BA-Mitarbei...	51063	Köln	Deutschland	Johanna Krzern...

Organisation wechseln Organisation beibehalten Abbrechen

Anzahl 2

Allgemein Profil Bemerkung Netzwerkordner

business//acts GmbH

Zu dieser Organisation wurde(n) 1 potentielle Dublette(n) gefunden

Adressen eintragen (Deutschland)

When creating new organizations, the company name, the 2nd name line, and in the case of further data entry, the postal code and the location of the visiting address, are checked against already existing organizations. (1)

In the case of hits, a red exclamation mark is displayed to the left of the company name. (2)

The exclamation mark signals to the user that there are potential duplicates and that this conflict must be resolved before saving. Clicking on the icon or saving the organization opens a dialog with the listed potential duplicates. (3)

In addition to the "Cancel" button (does not resolve the conflict), the following options are offered:

- Change organization button - Switches to the selected organization, discards the duplicate currently in the installation and resolves the conflict.
- Keep organization button - Keeps the organization currently in the installation and resolves the conflict.

Organizations, people, projects, opportunities, selections

Parallel editing of records



The screenshot displays the sellify CRM interface. At the top left, the 'sellify' logo is visible. The main area is divided into several sections:

- Company Profile:** 'sellify-Service GmbH' with contact information (E-Mail, Telefon, Fax, Webseite) and details (Verantwortlich, Nummer, Kontaktart, Branche, Code, US-ID-Nr.).
- Kalender:** A calendar view for November 2017, December 2017, January 2018, and February 2018.
- Personen Table:** A table listing employees with columns for Anrede, Vorname, Nachname, Funktion, Telefon, E-Mail, and Rang. The first row is highlighted in red.

A red box highlights the 'Bearbeiten' button in the top right corner of the table, with a red arrow pointing to it. Below the button, a tooltip shows the edit history: 'Erfasst: 26.11.2015 08:11:30 / Letzte Änderung: 21.04.2017 14:07:13 (Heinz Walter)'. The bottom right corner of the table shows 'Ausgeschlossene anzeigen Anzahl 12'.

The simultaneous editing of data records has been optimized for the release of sellify 3.0. Previously, when two or more users edited the same dataset in parallel, the message 'Dataset could not be saved because another user has edited it in the meantime' was issued.

If you now start the edit mode in the map view - click on the 'Edit' button - sellify checks whether the data record has been changed by another user in the meantime and then reloads the data record including the last saved change.

Organizations, people, projects, opportunities, selections

Options for deleting persons & adding variables



The screenshot shows the sellify interface for the organization 'Portofam Beteiligungs- & Finanzdienstleistungen GmbH'. The 'Personen' table is visible with the following data:

Anrede	Vorname	Nachname	Funktion	Telefon	E-Mail	Rang
Frau	Mariene	Kehler	Vertriebsleiterin	+49 89 455979712	mariene.kehler@portofam.de	1
Herr	Johannes	Fuchs	Geschäftsführung	+49 89 455979750	johannes.fuchs@portofam.de	2
Herr	Arnold	Brammer	Vertriebsbeauftragter	+49 89 455979713	arnold.brammer@portofam.de	3
Frau	Annikä-Louise	Baumgartner	Assistentin der GF	+49 89 455979718	annika-louise.baumgartner@portofam.de	4
Herr	Manuel	Hoppe	Vertriebsleiter	+49 89 455979716	manual.hoppe@portofam.de	5
Herr	Kenny	Haus	IT Admin		kenny.haus@portofam.de	6

A dialog box is open over the 'Personen' table, asking 'Wollen Sie die markierten Personen löschen?' with options 'Als ausgeschieden markieren', 'Endgültig löschen', and 'Abbrechen'.

In the delete dialog of persons (via context menu) you can now choose between "Mark as deleted" and "Delete permanently" as of sellify 3.0.

If you choose the second option, the person will be deleted and all links to the deleted person will be lost. However, the records themselves physically remain, such as for project or opportunity affiliations.

Additional variables have also been added for departments in the case of persons:

- Recipient (person) - department: atdep
- Sender (person) - department: audep

Organizations, people, projects, opportunities, selections

Compact view (Minicard) - Entries in birthday lists



The screenshot displays the sellify CRM interface. On the left, a navigation sidebar includes 'Organisation', 'Personen', 'Projekte', 'Chancen', 'Selektoren', 'Suche', and 'Analysen'. The main area is divided into two panes. The top pane shows the 'Geburtstagliste' (Birthday List) for 'Portofam Beteiligungs- & Finanzdienstleistungen GmbH'. It contains a table of contacts with columns for 'Kontakt' and 'Geburtstag'. The bottom pane shows a 'Person' dialog for 'Herr Johannes Friedrich' from 'AZ Versicherungen'. The dialog includes fields for 'Telefon', 'Privatnummern', 'Mobil', 'Fax', 'Adresse', 'E-Mail', 'Social Media', 'Verantwortlich', 'Nummer', 'Funktions', 'Position', 'Abteilung', 'Geburtsdag', and 'Ausgestrichen'. A blue arrow points from the 'Geburtstagliste' to the 'Person' dialog, indicating that double-clicking on an entry in the birthday list opens the person's detail dialog.

Double-clicking on an entry in the birthday list now opens the corresponding person dialog.

Organizations, people, projects, opportunities, selections

Deactivation for creating new records depending on authorization



The screenshot displays the sellify CRM interface. On the left, a navigation pane shows menu items: 'Organisation', 'Person', 'Projekt', 'Chance', 'Selektion', 'Suche', and 'Analyse'. The '+' icons next to 'Person' and 'Projekt' are disabled. The main area shows a profile for 'AZ Versicherungen' with contact information and a 'Mein sellify' section. Below the profile is a list of records with columns for 'Datum (von)', 'Datum (bis)', 'Status', 'Name', 'Beschreibung (intern)', 'Chance', 'Projekt', and 'Besitzer'. The bottom right corner shows 'Anzahl 25 (20 2h 00m)'.

Adding new records via the navigation pane (+) is disabled as of sellify 3.0 and is not visible if the logged-in user has not been assigned the right to create the respective records.

Organizations, people, projects, opportunities, selections

Import of selection members



The screenshot illustrates the process of importing selection members into the 'Heureka 2018 Hamburg' selection. The main interface shows the selection details and a list of 'Selektionsmitglieder'. A Windows Explorer window is open to the Desktop, where the file 'die zwei.csv' is selected. A configuration dialog for importing from a CSV file is shown, with settings for the separator (';'), the key column from the file ('Person - ID'), and the key column from sellify ('Person-ID'). A progress dialog shows the successful import of two members: 'Person 'Rolf Baum'' and 'Person 'Stefan Prothmann''.

In addition to adding selection members via the dynamic comport search, it is now also possible to import existing sellify data records into the current selection via a CSV file.

To do this, click on Add in your selection and then Import selection members. (1)

In the Windows Explorer window that opens, select the .csv file. (2)

A small configuration dialog for the data import will open, which you can start by clicking on Import. (3)

You can follow the progress in a separate dialog and have it output as a text file after completion. (4)

Organizations, people, projects, opportunities, selections

Various



The **behavior for network folders for organizations, people, projects and opportunities** has been improved for sellify 3.0. The 'Create new folder' function is now disabled if the configuration via `sellify/admin` is missing or insufficient.

The localization of the **context entry 'Send link as email' and 'Copy link'** for organizations, persons, opportunities, projects and selection has been extended to the effect that separate variables are now available for each of these context entries. This means that they are no longer managed centrally only once, as before, but are now available for each entity and can thus also be customized.

Improvement **warning message when changing cards**: If an organization card is in edit mode, the user receives the warning message "The organization is still being edited. Do you want to save the changes and continue?". After confirming this message, the user exits the edit mode and changes the map.

Copying persons: As of sellify 3.0, a person can no longer be copied if they have not entered the required mandatory fields (e.g. last name).

Change person card - social media: Analogous to the other entries with additional information (phone, e-mail, etc.), the order of the fields has been swapped: "Social Media URL" is displayed as the first field, "Social Media Type" as the second.

Activities & Documents

Display of activity/document types in Excel export



The screenshot displays the sellify CRM interface. On the left, there's a sidebar with navigation options like 'Organisation', 'Personen', 'Projekte', 'Kanban', 'Sichtansicht', and 'Suche'. The main area shows a list of activities and documents for 'sellify-Service GmbH'. The list has columns for 'Datum (von - bis)' and 'Typ'. An Excel export window is overlaid on top, showing a table with columns: 'Link', 'Ereignis', 'Art', 'Historie - Datum (von - bis)', 'Historie - Typ', 'Historie - Person', and 'Historie - Person'. A blue arrow points from the 'Art' column in the list to the 'Art' column in the Excel export. The Excel window also shows a menu bar with options like 'DATEN', 'START', 'EINFÜGEN', 'SEITENLAYOUT', 'FORMELN', 'DATEN', 'ÜBERPRÜFEN', 'ANSICHT', 'ACROBAT', and 'Hilfsmenü...'. The status bar at the bottom indicates 'Anzahl: 25' and 'Excel Export' is active.

The columns of the type icons in the archive views of activities (appointment, phone call, task) and documents (Word, PDF, e-mail, etc.) are now transferred as text information in the Excel export.

Furthermore, the "Excel Export" function is inactive when no records are displayed for export.

Activities & Documents

Distinction between e-mails with and without attachments



The screenshot displays the sellify 3.0 interface. On the left is a navigation sidebar with icons for 'Mein Team', 'Organisation', 'Person', 'Projekt', 'Stunde', 'Selektion', 'Suche', and 'Aktivitäten'. The main area is divided into several sections:

- Contact Profile (AZ Versicherungen):** Shows contact details such as E-Mail, Telefon, Fax, Website, and contact person (Heinz Walter).
- Calendar:** A monthly calendar view for December 2017, January 2018, February 2018, and March 2018.
- Archive View:** A table listing archived emails. The table has columns for 'Datum', 'Person', and 'Type'. The 'Type' column shows icons for different email types: a standard envelope for emails without attachments and an envelope with a paper clip for emails with attachments. A blue arrow points to the '07.12.2017' entry, which has a paper clip icon.
- Project List:** A table showing projects and their owners, such as 'selly 2.1 - Update und Erweiterung...' and 'AZ Versicherung - Service & Support'.

As of sellify 3.0, a distinction is made when archiving e-mails as to whether the e-mail has attachments or not. If attachments are included, an "Envelope with paper clip" is displayed as an icon in the type column of the archive view.

Activities & Documents

Reminder for documents



The screenshot illustrates the process of setting a reminder for a document in the sellify 3.0 interface. It is divided into three main sections:

- Left Panel:** Shows the document details for 'AZ Versicherungen'. A document titled 'Ihre Rechnung zur Bestellung DE173080865' is selected. A blue box highlights the 'Erinnerung einrichten' (Set reminder) button. A large blue arrow points from this button towards the right.
- Middle Panel:** Shows the same document with the reminder time set to 14:00. A blue arrow points from the reminder time dropdown menu towards the right.
- Right Panel:** Shows a calendar view for December. A blue arrow points from the calendar towards a 'Erinnerung' (Reminder) dialog box. The dialog box shows the reminder for '05.12.2017' at 14:00, with the contact 'Andreas Pientz (AZ Versicherung)' and the description 'Ihre Rechnung zur Best...'. The dialog also includes options for 'Vorschau anzeigen', 'Erneut einrichten', and 'Ausschalten'.

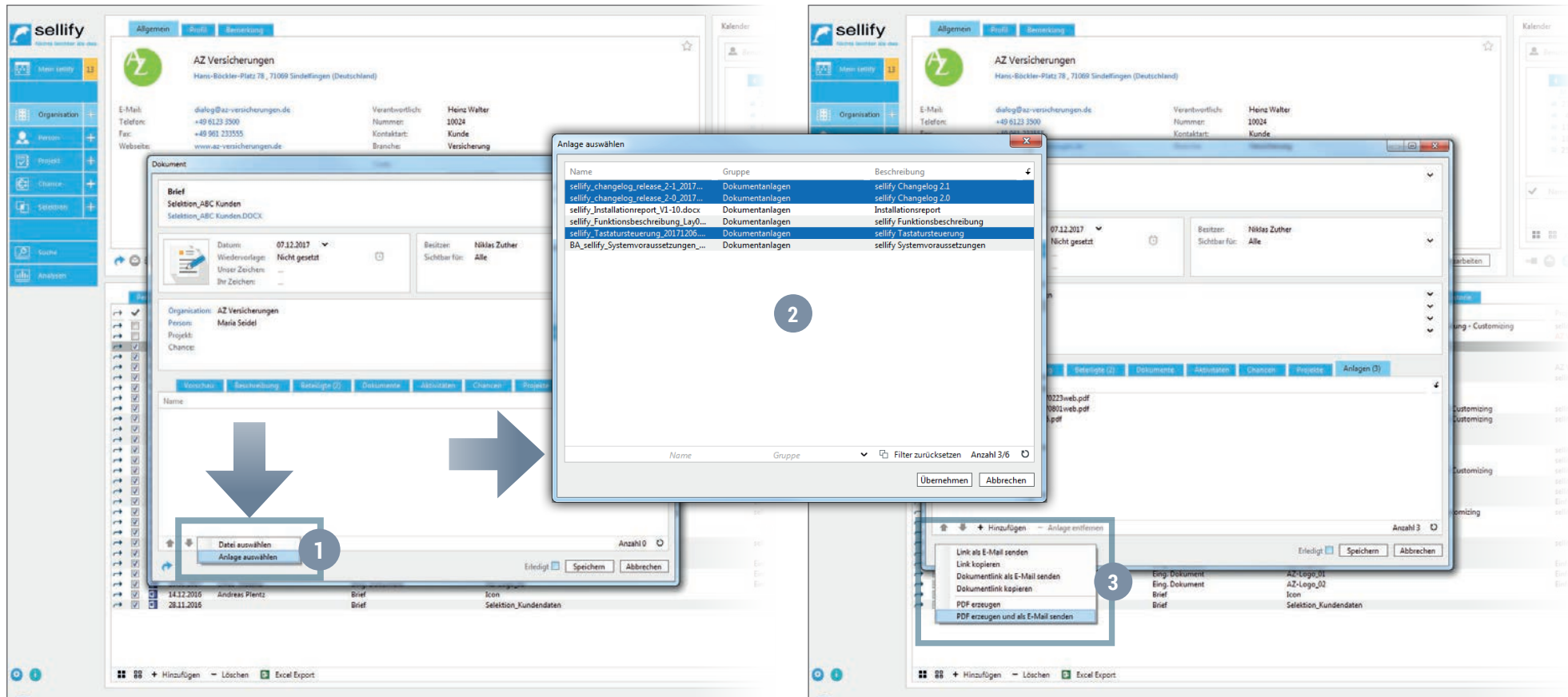
For sellify 3.0, analogous to the activities, reminders for not completed documents are now also available.

To do this, click on the alarm clock icon in the document dialog and set the desired reminder time. Saving the document activates the reminder as usual. Documents marked accordingly will then automatically appear in the reminder dialog at the reminder time.

The reminders are automatically deleted when the object is marked as done.

Activities & Documents

Document API - selection of PDF attachments to documents



When sending Office documents (MS-Word, Excel,...) that should contain document attachments from sellify, sellify 3.0 has been extended by the selection of attachments.

In the document dialog under attachments, select 'Select attachments' under Add. (1)

Using the dialog, you as the user decide which attachments are to be attached to the document to be sent. To include attachments to be sent, select the corresponding lines. With the buttons 'Select all' you can either send all attachments or exclude all attachments with 'Deselect'. (2)

Apply' accepts your selection, closes the dialog and you can continue with the sending process. (3)

Search, Input & DKS

search criteria, search function extension, context menu extension for organizations and persons & favorites selection



The screenshot shows the sellify CRM interface. On the left, there is a sidebar with navigation icons for 'Organisation', 'Person', 'Projekt', 'Chance', 'Zurück', and 'Suche'. The 'Suche' icon is highlighted with a blue box and a blue arrow pointing to the search results table. The table has columns for 'Datum (von - bis)', 'Person', 'Typ', 'Beschreibung', 'Chance', and 'Projekt'. The data rows show various activities and customer care entries for 'Andreas Plentz'.

The screenshot shows the 'Suchkriterium hinzufügen' dialog box. It has a 'Feld:' dropdown menu with 'Person' selected. A list of search criteria is shown, including 'Privatadresse - PLZ', 'Privatadresse - Straße', 'Privatnummer', 'Projektmitglied - Funktion', 'Projektmitglied - Information', 'Social Media Typ', 'Social Media URL', 'Telefon', 'Titel', 'Verantwortlich', 'Verkaufsbeteiligter - Funktion', 'Verkaufsbeteiligter - Kommentar', 'Vorname', and 'Profil'. The 'Profil' option is highlighted with a blue box and a blue arrow pointing to a sub-menu with options: 'Anzahl Profileigenschaften', 'Eigenschaft', 'Erfasst', 'Erfasst von', and 'Thema'. A blue circle with the number '1' is next to the 'Anzahl Profileigenschaften' option.

The search criterion of the Dynamic Comfort Search "Number of profiles" for Organization and Person has been renamed to "Number of profile properties" for sellify 3.0. (1)

Search texts are automatically trimmed (removal of blanks) as of sellify 3.0, so that relevant entries are always found.

Selected organizations and persons can now also be added to projects, opportunities and selections via the **context menus** of a DKS result, selection result and in the compact views birthday lists + favorites.

As of sellify 3.0, **favorites** are only activated by double-clicking and the search results are loaded.



Aktivität - Typ

Liste Benutzergruppen

Gruppeneintrag suchen

Sichtbar für (Benutzergruppe)

- Administration (IT)
- Aushilfen
- Büromanagement
- Einkauf
- Geschäftsführung
- Marketing
- Personalwesen
- Rechnungswesen
- Service
- Vertrieb

Anzahl 10

Gruppenspezifische Sichtbarkeit für diese Liste

X	Rang	Listeneintrag	Gelöscht
<input checked="" type="checkbox"/>	1	Besprechung intern	nein
<input checked="" type="checkbox"/>	2	Meeting extern	nein
<input checked="" type="checkbox"/>	9	Anruf ausgehend	nein
<input checked="" type="checkbox"/>	10	Anruf eingehend	nein
<input checked="" type="checkbox"/>	7	Wiedervorlage	nein
<input checked="" type="checkbox"/>	8	Notiz	nein
<input checked="" type="checkbox"/>	5	Urlaub	nein
<input checked="" type="checkbox"/>	6	Privat	nein
<input checked="" type="checkbox"/>	3	Kundenbesuch intern	nein
<input checked="" type="checkbox"/>	4	Kundenbesuch extern	nein
<input checked="" type="checkbox"/>	13	Reserviert	nein
<input checked="" type="checkbox"/>	12	Telefonkonferenz	nein

Gelöschte Anzahl 12

Name: Administration (IT)
 Tooltip: GE:"Ordnet Personen der Benutzergruppe 'Administration (IT)' zu";US:"Assigns users to user group 'Administration (IT)'"

Schließen

The administration of lists in sellify//admin has been extended by a view "User groups", in which the assigned list entries to the individual user groups are displayed. For this purpose, the area in sellify//admin has been re-divided.

You will now find two tabs 'List' and 'User groups'. Under 'User groups' there are 2 tables next to each other. In the left table all user groups are listed, in the right table the list objects. Using the checkboxes in the right table, you can see and also change which list objects from the open list can be seen by the respectively selected user group. In the status bar of the right table, you can activate or deactivate all visibilities at once using the "check all / none" buttons.

Furthermore, the performance when editing the rank in lists with many entries has been significantly accelerated.



The screenshot shows the 'Dokument - Vorlage' application window. The main content area displays a list of document templates. A search bar at the top left contains the text 'Listeneintrag suchen'. The list has the following columns: 'R...', 'Listeneintrag', 'Dateiname', 'Gelös...', 'Aufbewahrungsdau...', 'Überschrift', and 'Gelöscht'. The 'Dateiname' column is highlighted with a blue box, and a blue arrow points from the 'Listeneintrag' column to it. The list contains 9 entries, with the first three being 'Brief', 'Memo', and 'Eing. Dokument'. The 'Gelöscht' column shows 'Anzahl 0' and 'Anzahl 9' respectively. The window has a 'Schließen' button at the bottom right.

R...	Listeneintrag	Dateiname	Gelös...	Aufbewahrungsdau...	Überschrift	Gelöscht
1	Brief	LETTER.DOCX	nein	nicht auslaufend		
2	Memo	MEMO.DOCX	nein	nicht auslaufend		
3	Eing. Dokument	DOCINC.DOCX	nein	nicht auslaufend		
4	Email (eingehend)	REPLY.MSG	nein	nicht auslaufend		
5	Email (ausgehend)	FORWARD.MSG	nein	nicht auslaufend		
6	Angebot	QUOTE.DOCX	nein	nicht auslaufend		
7	Auftragsbestätigung	QUOTEDETAILS.DO...	nein	nicht auslaufend		
8	Ausgangsrechnung	MAIL.MSG	nein	nicht auslaufend		
9	Eingangsrechnung	FORWARD.MSG	nein	nicht auslaufend		

In sellify//admin the list overview for template (document templates) has been extended by the column 'filename'. So you can already see in the list overview which document it is. You can add this column as usual via the column configuration.

sellify//admin

Roles in the user administration



Benutzern...	Vorname	Nachname	Organisation	Primärgruppe	Rolle	Autostart	AD-Login	Ausgeloggt-Meldung	Ausgeschie...	Letzte Anmeldung
admin	Heinz	Walter	sellify-Serv...	Administration	Benutzerzebene 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	08.12.2017
Schult	Alexander	Schulz	sellify-Serv...	Administration	Benutzerzebene 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.2017
Herd	Daniel	Herd	sellify-Serv...	Administration	Benutzerzebene 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.2017
Köhler	Dominik	Köhler	sellify-Serv...	Vertrieb	Benutzerzebene 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.2017
Borchert	Fabian	Borchert	sellify-Serv...	Technik	Benutzerzebene 0 (5 weitere)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.2017
Schmelzer	Lukas	Schmelzer	sellify-Serv...	Technik	Benutzerzebene 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.2017
Zuther	Niklas	Zuther	sellify-Serv...	Technik	Benutzerzebene 0 (5 weitere)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.2017
Pfeifer	Sebastian	Pfeifer	sellify-Serv...	Service	Benutzerzebene 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.2017
Jenniges	Timo	Jenniges	sellify-Serv...	Service	Benutzerzebene 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.2017
Langer	Tom	Langer	sellify-Serv...	Technik	Benutzerzebene 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.2017

In the user overview, the role is displayed as a separate column as of sellify 3.0. The tooltip shows you all assigned roles of a user.

When you view employees who have left, from now on they will be displayed in red font.



sellify//onTour has been extended for sellify 3.0 and optimized for **handling the ID assignment** for newly created objects (organization, person, project, opportunity, etc.).

In addition, the database backup for new onTour databases can be created directly compressed by the new setting "**BackupCompressionMode**". This saves storage space on the server as well as on the respective workstation and reduces the transfer volume.

The **handling of installations and updates has also been optimized**: The program files are now automatically distributed to each sellify//onTour user via the standard distribution mechanism via Update Tools. Thus, in case of a version update, sellify//onTour no longer has to be uninstalled at the respective users before the new version can be installed.

sellify//onTour

Status display data synchronization



ACHTUNG: Die verwendete OnTour-Datenbank ist nicht mehr auf dem aktuellen Stand. Änderungen werden nicht mehr mit der zentralen Datenbank abgeglichen. Bitte re-initialisieren Sie Ihre Datenbank!

sellify
Nichts leichter als das.

Mein sellify

Organisation +

Person +

Projekt +

Chance +

Selektion +

Suche

Analysen

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Code: BAKöln

USt-ID-Nr: DE123456789

Bearbeiten

Kalender

Benutzer für Assistenzmodus wählen

Oktober 2017

	M	D	M	D	F	S	S
39	25	26	27	28	29	30	1
40	2	3	4	5	6	7	8
41	9	10	11	12	13	14	15
42	16	17	18	19	20	21	22
43	23	24	25	26	27	28	29
44	30	31	1	2	3	4	5

Name

Kalender / Ressource suchen 0





Ausgeschiedene anzeigen

Personen Beziehungen Aktivitäten Dokumente Chancen Projekte Selektionen Historie

Anrede	Vorname	Nachname	Funktion	Position	Telefon	E-Mail	Rang
Herr	Boris	Hose	Geschäftsführer		+49 221 99225910	boris.hose@businessacts.de	1
Herr	Jens	Schavier	Technischer Berater		+49 221 9959219	jens.schavier@businessacts.de	4
Herr	Stefan	Prothmann	Senior Consultant		+49 221 99225922	stefan.prothmann@businessacts.de	5
Herr	Daniel	Brammertz	Entwickler		+49 221 9959216	daniel.brammertz@businessacts.de	6
Herr	Phillipp	Jahn	Entwicklung			phillipp.jahn@businessacts.de	9
Herr	Jörg	Wolfinger	Entwicklung			joerg.wolfinger@businessacts.de	10
Frau	Elenore	Blichmann				eleonore.blichmann@businessacts.de	12
Herr	Robin	Böhm			+49 221 9959221	Robin.Boehm@businessacts.de	15
Herr	Till	Fälligen	Techniker		+49 221 9959213	Till.Faelligen@businessacts.de	17
Frau	Juliane	Brandt	Marketing		+49 221 9959215	juliane.brandt@businessacts.de	20
Herr	Martin	Kaes				martin.kaes@businessacts.de	24
Frau	Kathrin	Goriss-Kanters			+49 221 9959241	Kathrin.Goriss-Kanters@businessacts.de	25
Herr	Andreas	Lemacher	Consultant / Prokurist			andreas.lemacher@businessacts.de	26

Hinzufügen Löschen Excel Export Aktionen Ausgeschiedene anzeigen Anzahl 13

Furthermore, sellify//onTour for sellify 3.0 has been equipped with a status display for the synchronization of your data via your Windows taskbar. It will show you a percentage of progress each time you download and mount the new database into your local system. The icons show you the current status as follows:

-  (Re)initialize the database
-  Not all data has been pulled from the server yet.
-  Data is sent to the server, but the client has already received all data from the server.
-  The database is outdated, no connection to the local database can be established or access to the central database is blocked. As soon as the lock is removed, the user will be informed about it and advised to create a new sellify//onTour database.

sellify//phone

Create activities from call history



The screenshot displays the sellify application interface. At the top left, there's a navigation sidebar with icons for 'Home', 'Anfragen', 'Personen', 'Organisation', 'Einstellungen', and 'Analyse'. The main area is split into two panes. The left pane shows the contact details for 'sellify-Service GmbH', including contact information and a list of staff members. The right pane shows a calendar view. Below these panes is a table of call history. A context menu is open over a call entry, showing options to create activities from the call history.

Personen	Bearbeitungen	Aktivitäten	Einwohner	Ordnung	Prozesse	Sitzungen	Ergebnis
Herr	Heinz	Walter					
Herr	Alexander	Schulz					
Herr	Daniel	Herd					
Herr	Dominik	Köhler					
Herr	Fabian	Borchert					
Herr	Lukas	Schmelzer					
Herr	Niklas	Zurfler					
Herr	Sebastian	Pfeifer					
Herr	Timo	Jenniges					
Herr	Tom	Langer					
Herr	Juliane	Brandt					
Herr	Stefan	Prothmann					

Anrufer	Vorname	Funktion	Telefon	E-Mail	Rang
Herr	Heinz	Walter	+49 221 456697	walter@sellify.de	1
Herr	Alexander	Schulz	+49 221 564798	schulz@sellify.de	11
Herr	Daniel	Herd	+49 221 564798	herd@sellify.de	12
Herr	Dominik	Köhler	+49 221 564798	kohler@sellify.de	13
Herr	Fabian	Borchert		sellify.de	14
Herr	Lukas	Schmelzer		sellify.de	15
Herr	Niklas	Zurfler		lby.de	16
Herr	Sebastian	Pfeifer		lby.de	17
Herr	Timo	Jenniges		sellify.de	18
Herr	Tom	Langer		lby.de	19
Herr	Juliane	Brandt			20
Herr	Stefan	Prothmann			21

sellify//phone has been enhanced for sellify 3.0. You can now create tasks and phone calls directly in sellify from the history (call history) in addition to appointments.

To do this, navigate as usual via the history to the respective caller for whom you want to create an activity and select the desired activity type in the context menu. The corresponding activity dialog opens in sellify.

BUGFIXES

Various



3.0

- sellify startup in silent mode - A sellify preloaded by silent mode now does not create a second process on sellify startup under terminal servers.
- **sellify//admin** - system events set in sellify//admin have been corrected. | User capture optimization - case sensitivity of the user name is no longer differentiated. Saving remains inactive as long as the string already exists in the user name. | The rank configured in sellify//admin for activity type and document type is now taken into account in sellify. | The function for a double click on documents (show dialog or open document) that can be configured in sellify//admin is now stringently executed. | The stored tooltips for list entries are now displayed in edit mode as well as in view mode. Multilingual entries are recorded in the format GE: "Text in German";US: "Text in English". | The occurrence of incorrect ranks when sorting list entries in sellify//admin has been corrected.
- **sellify//onTour** – Fixed an error for the "sellifyversion" table that caused the version not to be maintained correctly. | Attachment creation now works even with onTour database enabled if the local archive path is not configured.
- **Outlook Connection** – The archiving dialog in sellify is now always opened after the first click on the archive button. | When creating a new person from the email archiving process, a user can mark the desired email addresses of the email to add to the new person. | The processing display (hourglass) is now always terminated when the sellify document dialog is open. | Emails can now be archived if they contain more than 35 recipients. | Outlook plugin connection failures to the SQL server no longer require an Outlook restart.
- **My sellify** – Appointment shifts in the week and month view no longer lead to duplicate appointments. | Double-click behavior - New activities are now only created from the relevant calendar area. | Assistance mode - The selected user in assistance mode is now automatically entered as the responsible person for new cards and as the owner of activities and documents. | Invitation management - For already accepted or rejected invitations, the corresponding buttons are disabled. | Only invitations that the user can also accept or decline are now displayed in the "Invitations" archive view.
- **Group dates** – The available "Accept" and "Reject" options have been unified in the dialog and context menu and update each other. | Long texts with more than 2047 characters are no longer truncated for group appointments.
- **Activities/Documents** – When linking opportunities, the opportunity participants are now additionally taken into account. | All document types defined as "incoming" are filtered out of the selection and history list when a new outgoing document is created. For incoming documents and in the document dialog of an existing document, all document types are listed. | Document creation - data changes to a person are directly transferred to a new document. | Newly defined variables for use in serial letters are available in the sellify Word plugin. | Process handling for 32/64 bit has been adjusted for better performance of document preview.
- **Network folder** – The "Refresh" button checks the current availability of the network folder and thus improves the behavior during VPN connections. |When creating a new document in an alternative storage location, the user receives a warning if the selected folder is not available.
- **Organization** – In the dialog for organization all relevant tabs are now available. | The Contact type field is again a mandatory field for saving organizations. |The default values for contact type and industry defined in sellify//admin are now also pre-displayed for entering an organization in the dialog.

BUGFIXES

Various



- Passive relationship types are available again when creating **relationships**.
- **Opportunities/Projects** – In the drop-down list for the linking of organization, person and project, a new entry can now be created in each case. | With regard to the pre-filling of linked information when creating a new opportunity, all links are now transferred based on the current data record. | Rights management customization - Users without the right to create organizations and persons are no longer shown the options to create a new entry for project members and opportunity participants. | Confidential records - If a record has a link that is not visible to the logged-in user (e.g. project, opportunity), it is displayed as 'Opportunity (confidential)' instead of the object name. The link to the object is inactive in this case. | Project members/opportunity participants - In the Add dialog for project members and opportunity participants, the option "Show all" is now offered for a result set of more than 100 entries. | Duplicate entries for project members and opportunity participants are now avoided even with quick (multiple) clicks.
- Add to **selection**: Now also works in the archive view "Selection" of organization and person.
- **DKS** – Enhancement of filtering for non-matching data content (e.g. year of foundation = 0). | The search for e-mail address no longer returns persons without organization assignment who do not match the search criterion.
- **Reporting** – The analysis dialog can now no longer be opened multiple times and can be minimized via the "Minimize" button.
- Create record: Without the right to create records, new entries can no longer be added to link fields.
- Company selection in link dialogs - When linking activities, documents and opportunities, the user now has access to the history of the last called organizations and full text search is supported in the organization search.
- The preview view is now also updated when changing records via the arrow keys.
-

Have we forgotten anything?

Would you like to see more functions, do you have suggestions or ideas for improvement? We are all ears and are at your disposal!

Contact us at: 0221 99 592 0 or send us an email to: support@businessacts.de