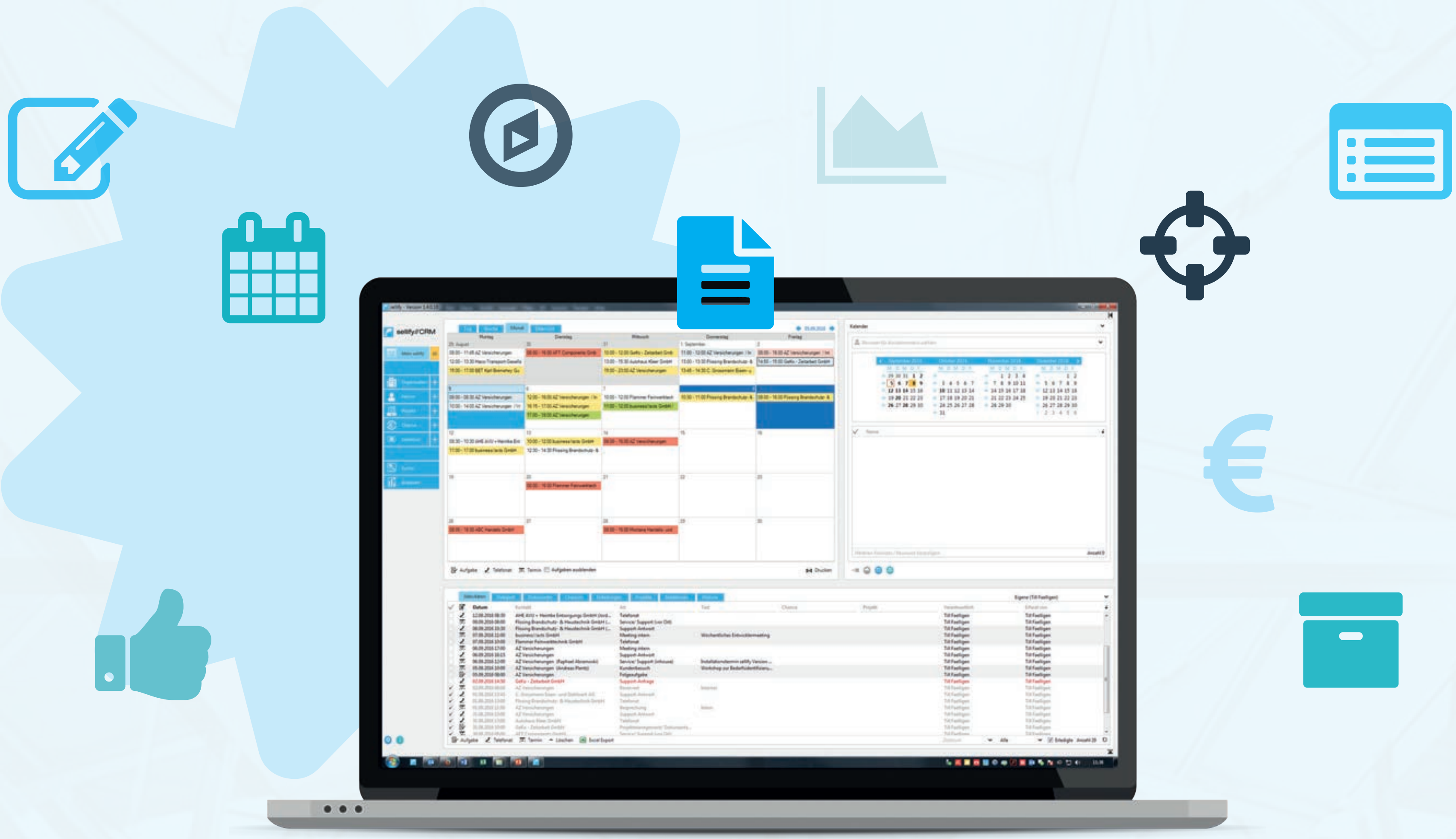
Changelog – What‘s new?

Release 3.0 – New features, improvements, bug fixes

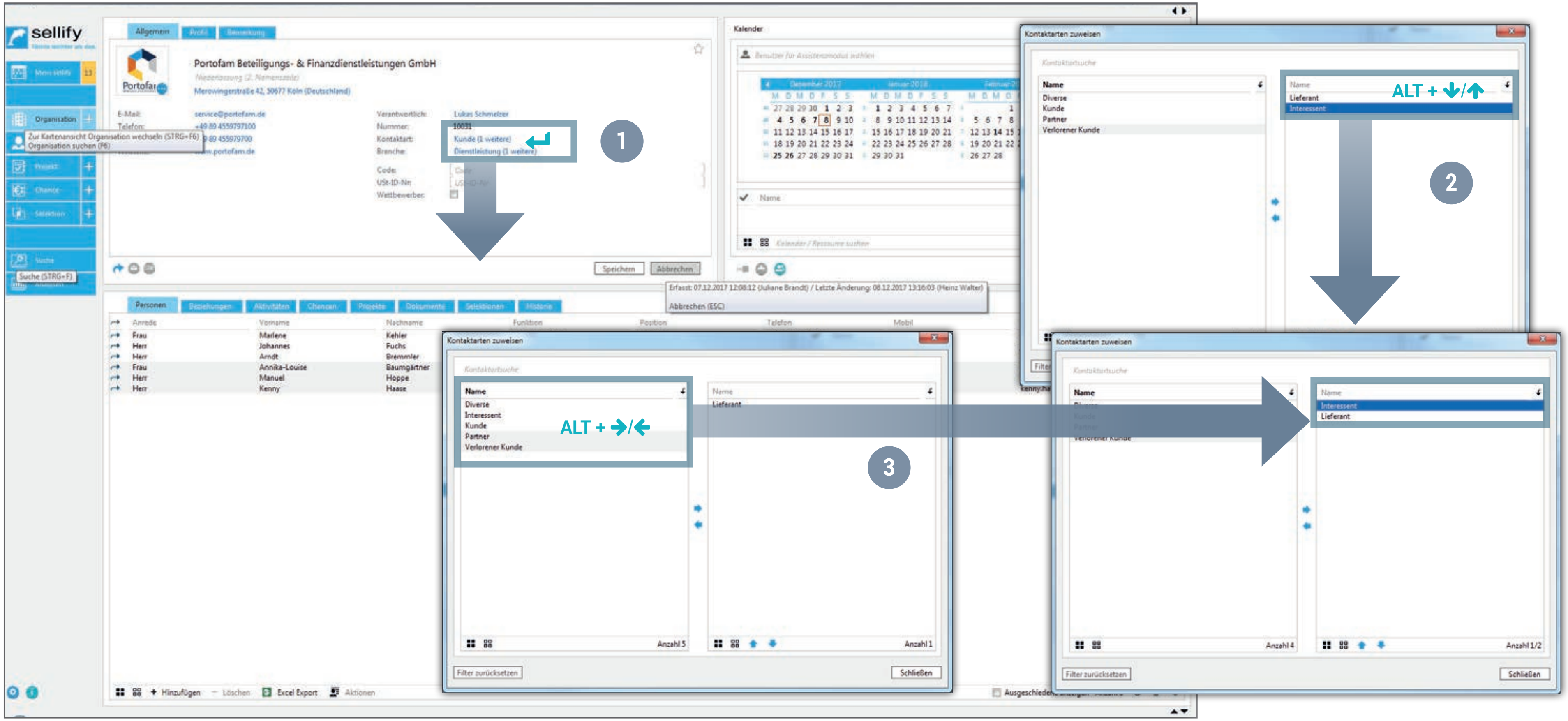


sellify
Nichts leichter als das.

Contents

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)

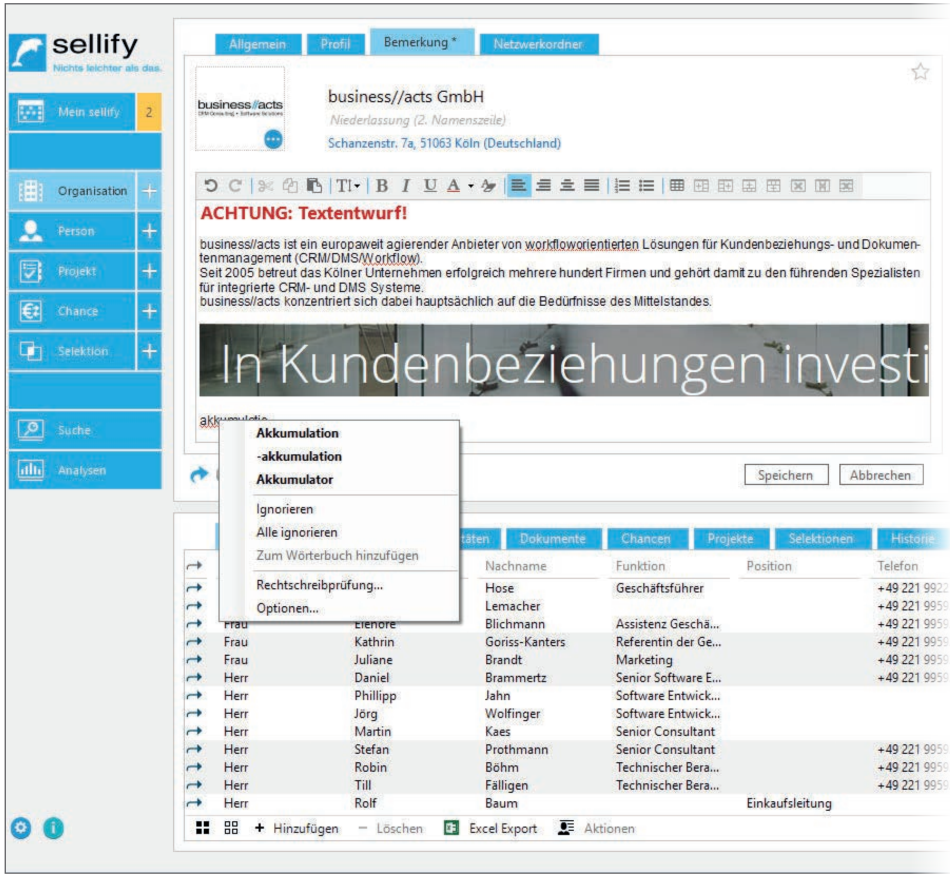
TAB | CTRL + TAB	Moves to next field | Moves to previous field
ENTER	• In the case of a hyperlink (address, telephone, e-mail, etc.), the input mask opens. • In case of a list, the marked list entry is taken over • Long text: line change (to leave you have to press TAB) • Buttons: Executes the respective action
Arrow down	• 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	• 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	• 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

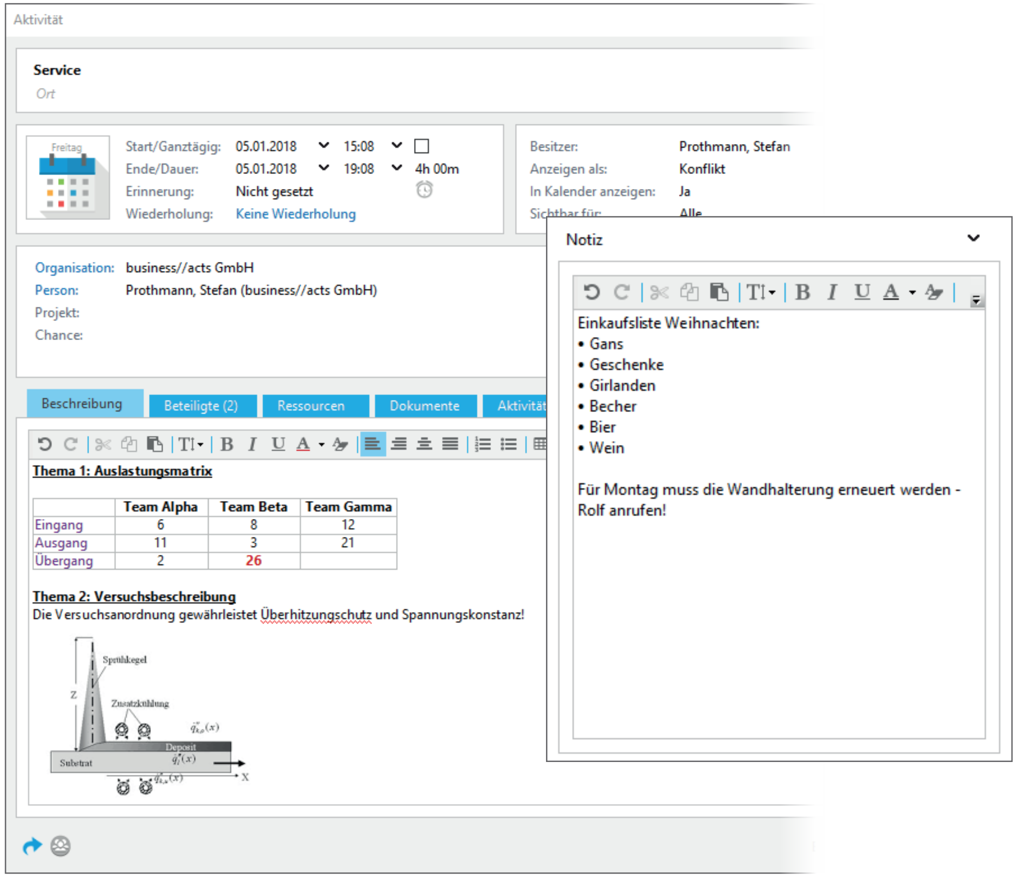
General

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	Cancels 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





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.

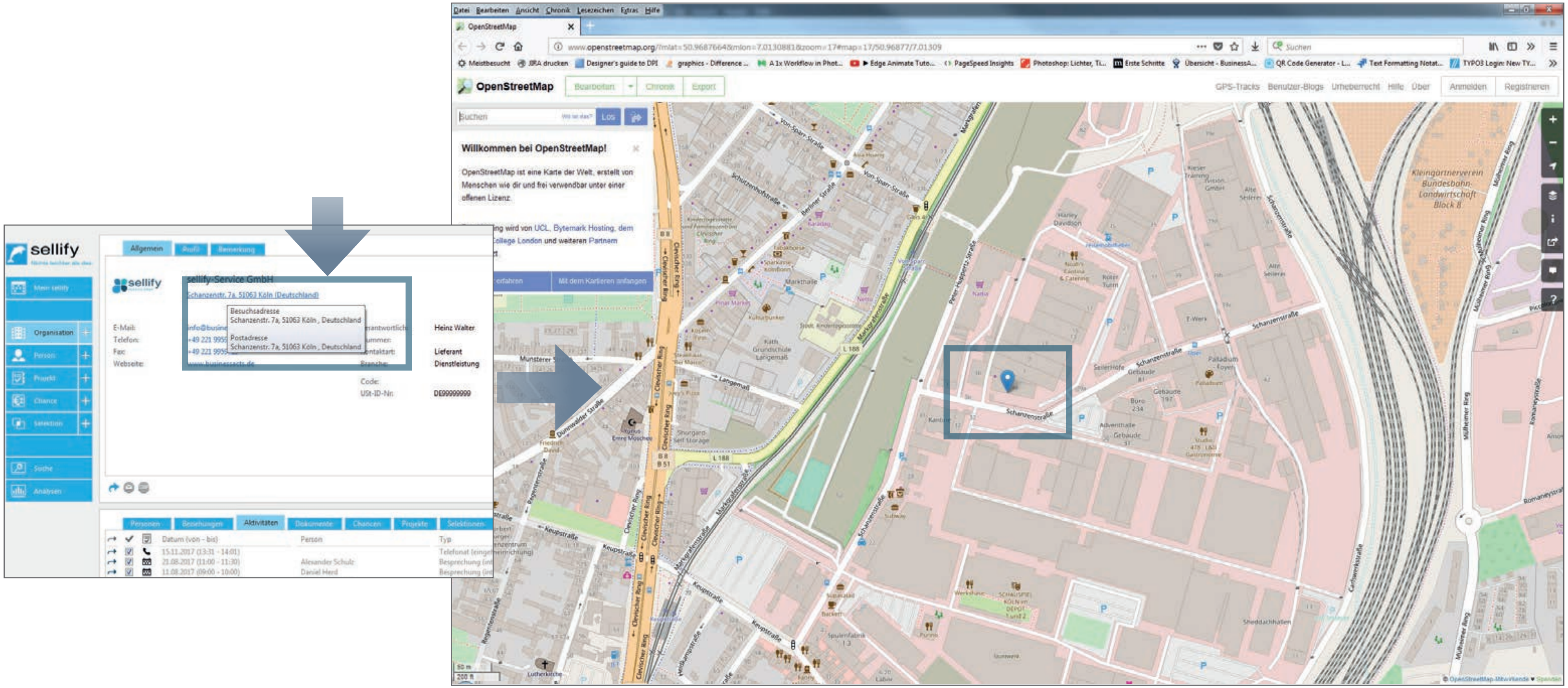
You can apply the format assignments via the toolbar placed above the respective text field and via the context menu. In addition, you can now insert formatting from other programs and even images from your clipboard.

In addition to formatting, the text entries are checked for spelling errors and then underlined in red wavy. 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

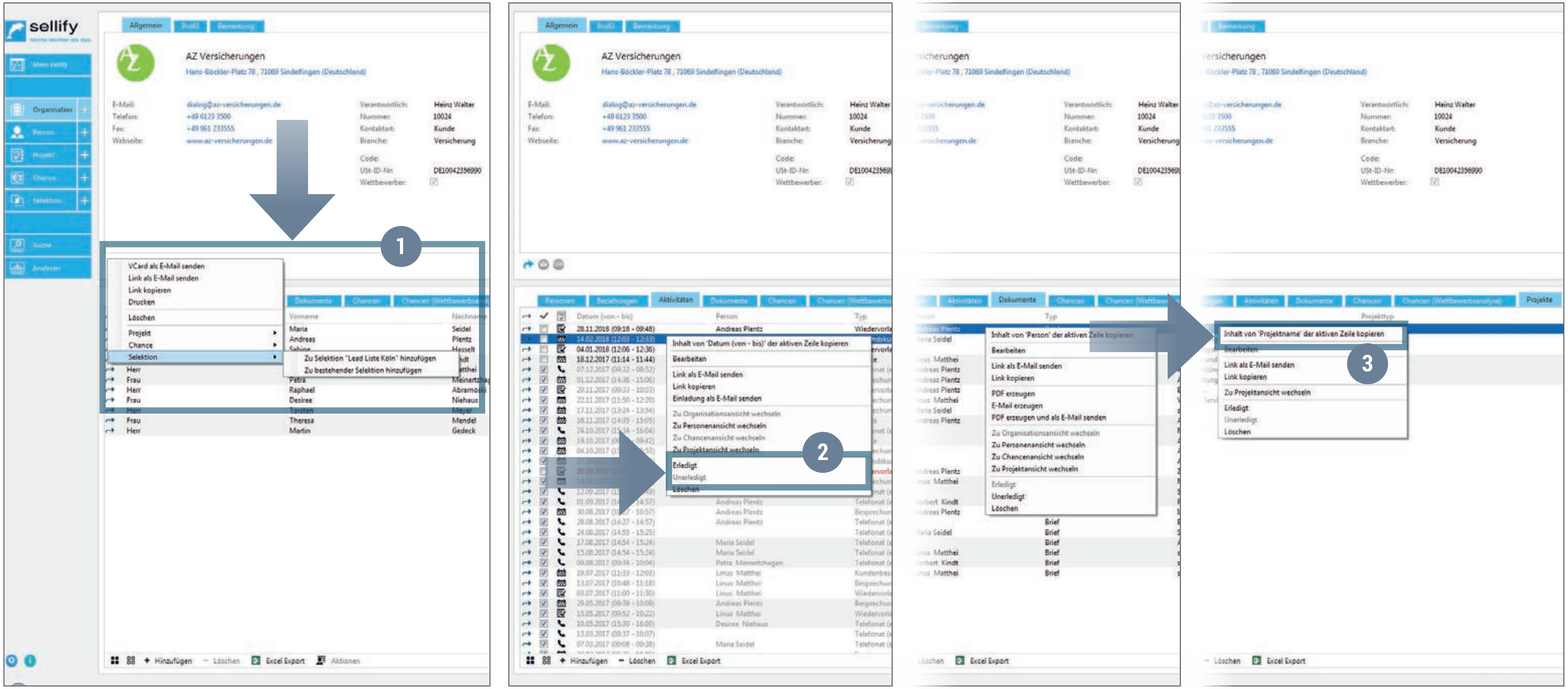


In sellify 3.0, a map view or route planning is now also available.

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



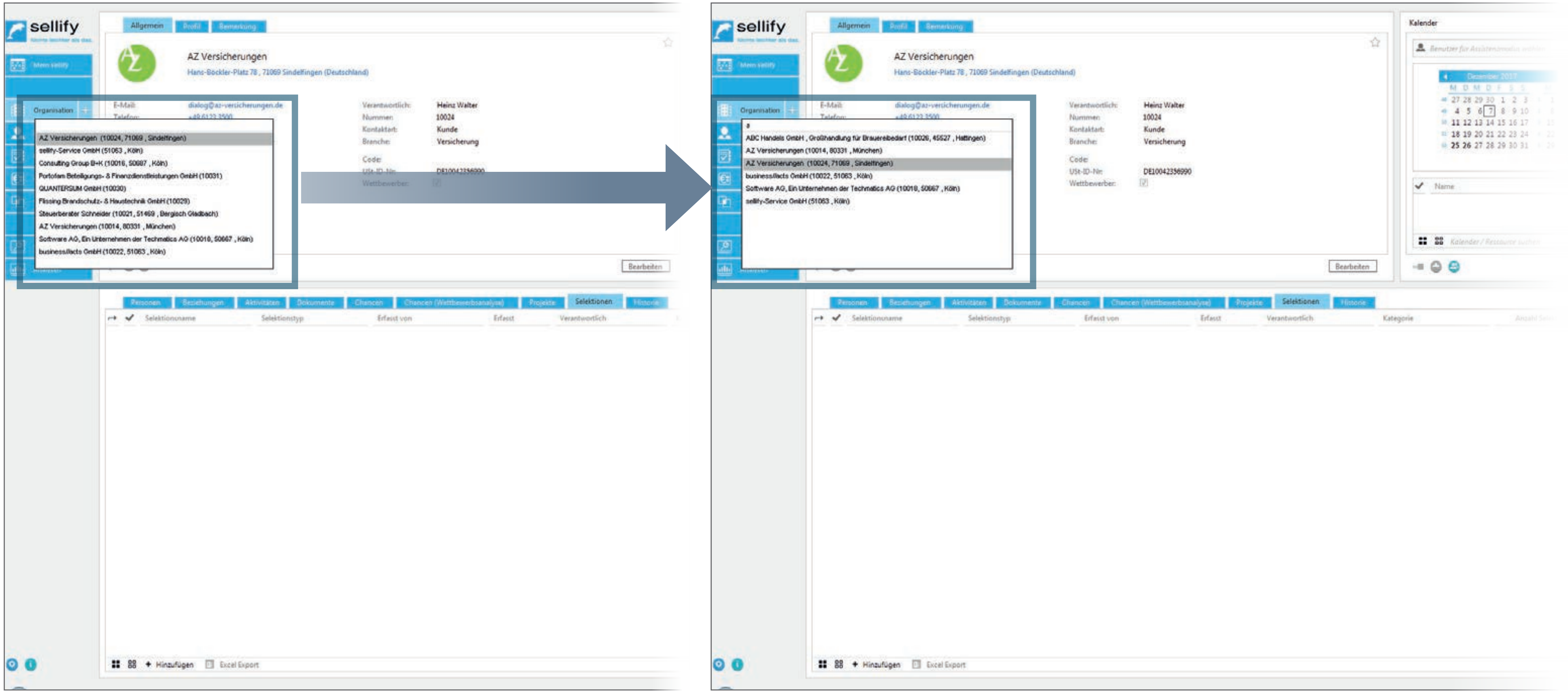
The entries in context menus of map and archive views (left-click on multitask arrow in maps (1) and right-click in archive views) have been unified and restructured.

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



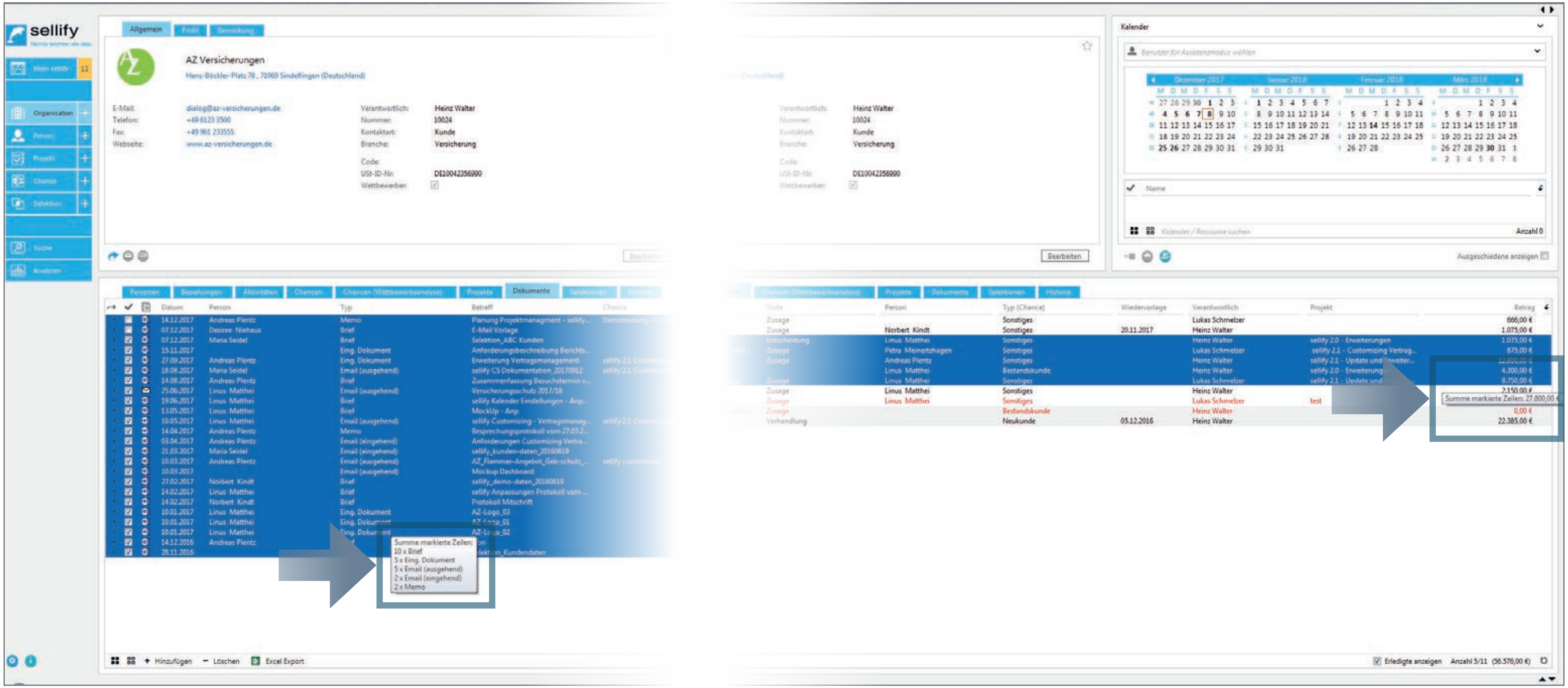
The quick search function has been further enhanced for sellify 3.0, replacing the previously available search function.

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-Ser-ver 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

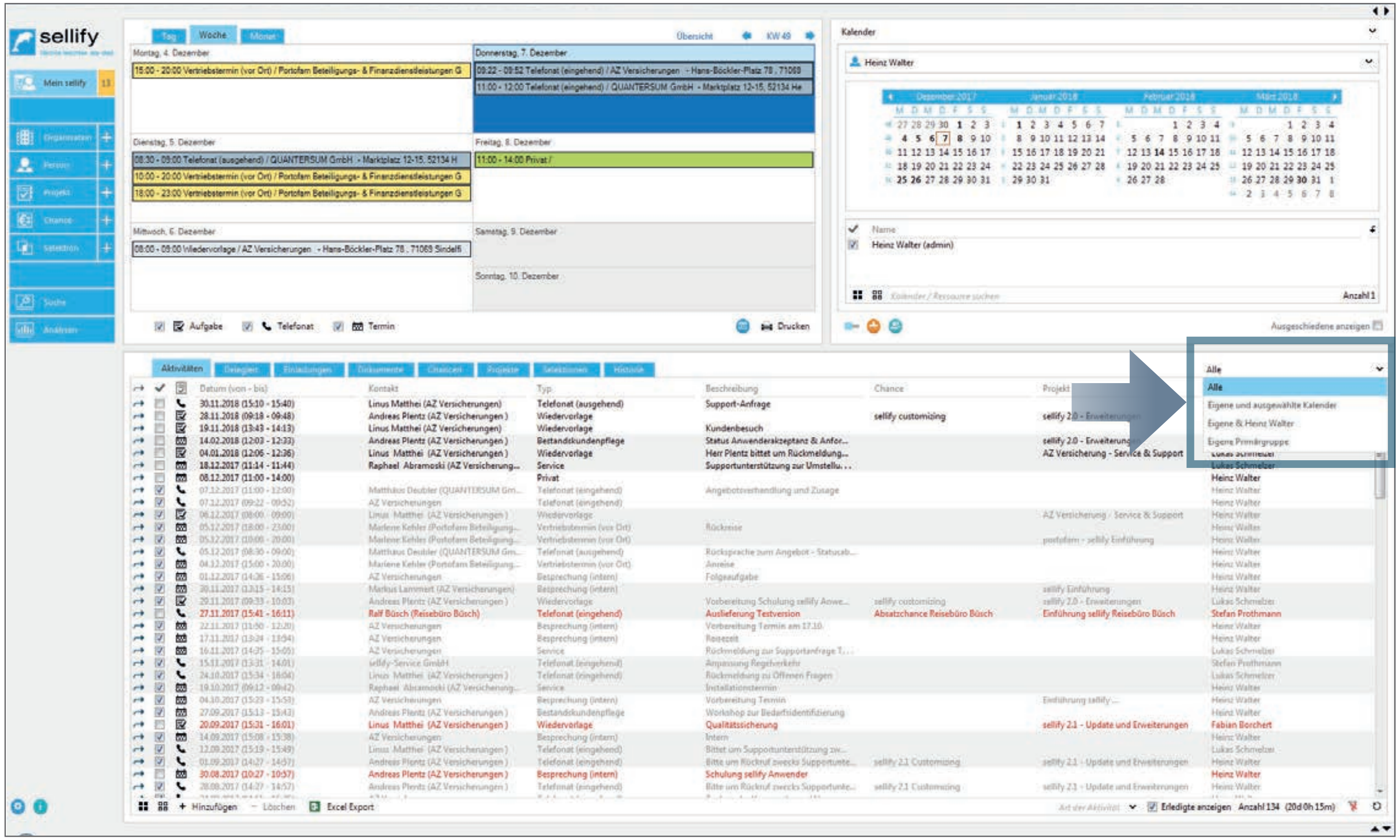
Display of totals for multiple selections in archive views



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 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)

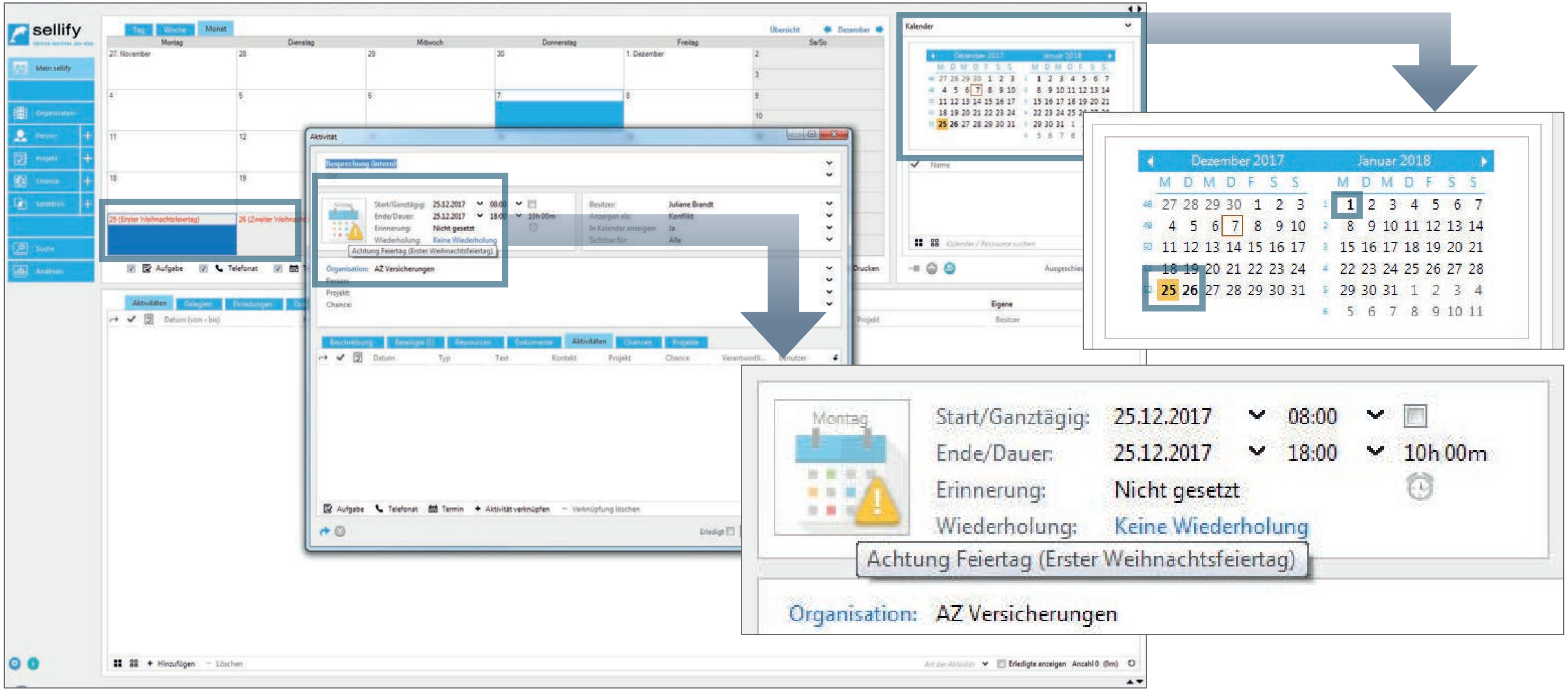
Start time for activities: If you are not in the calendar view, then "Now" is always entered as the start time for new activities. Only in the calendar view, the date active there should be taken over, which was previously the case everywhere.

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

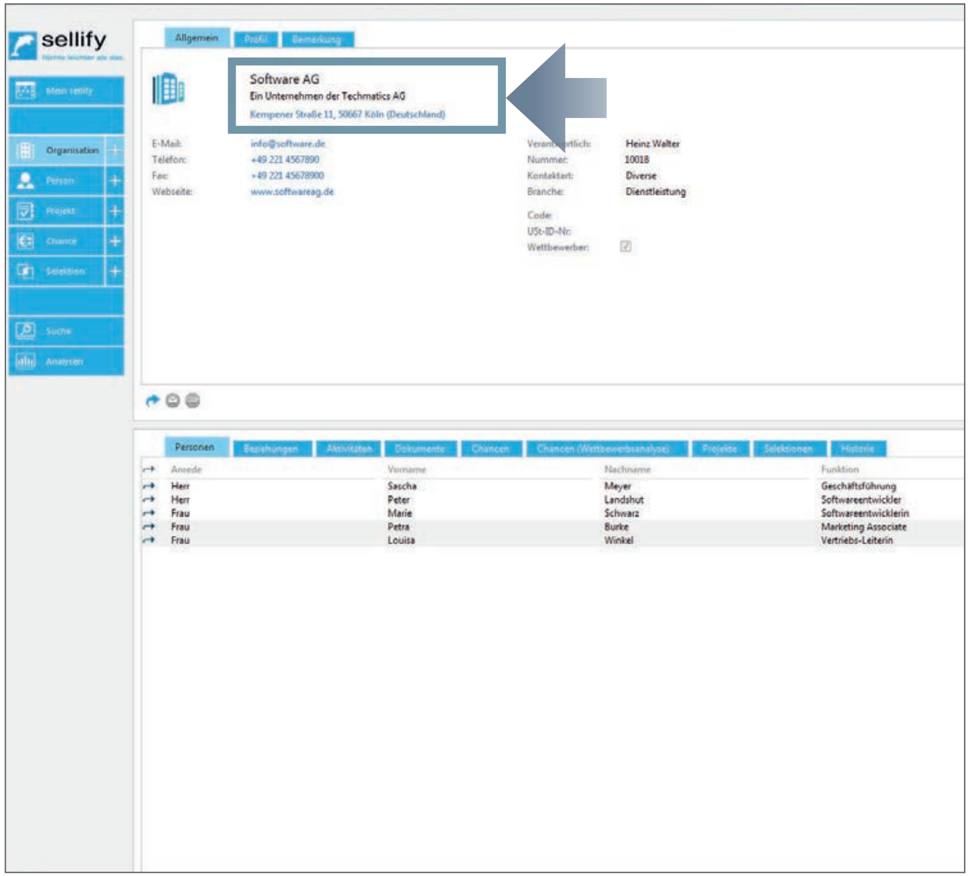


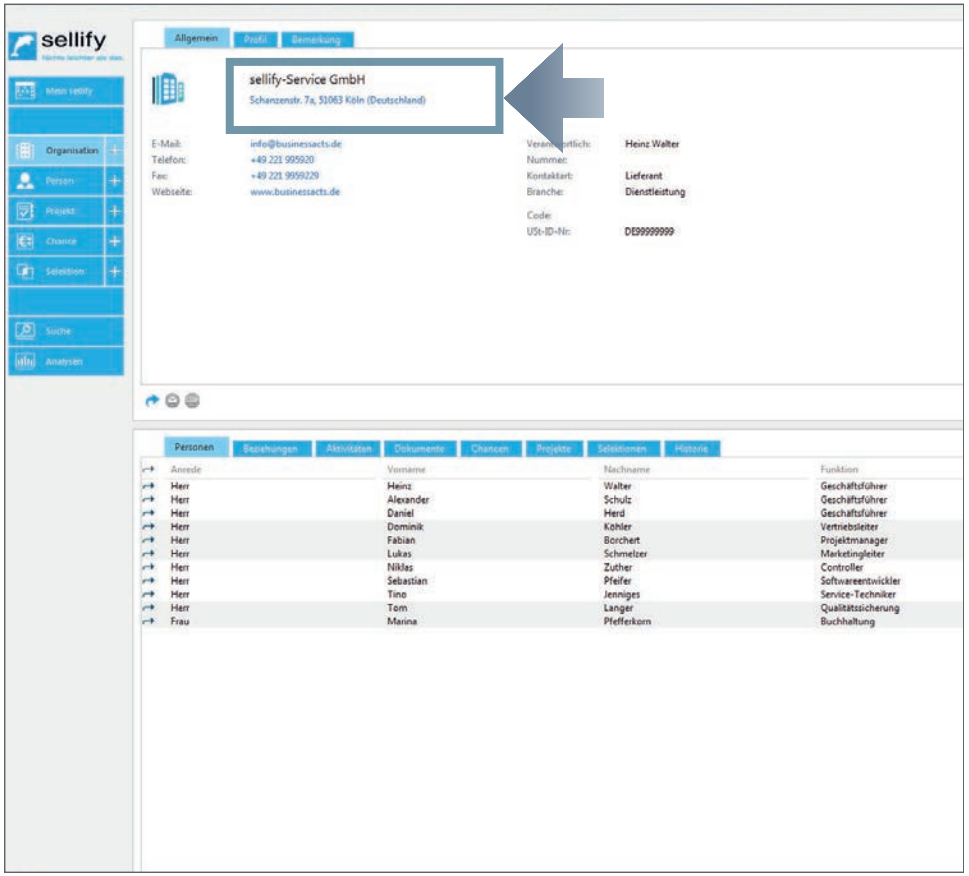
The German holidays are now displayed in sellify. In the individual calendar views, the calendar day is displayed in red font and the holiday name in brackets. Holidays are also highlighted in the compact view calendar.

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.

Dynamic adaptation of the address line

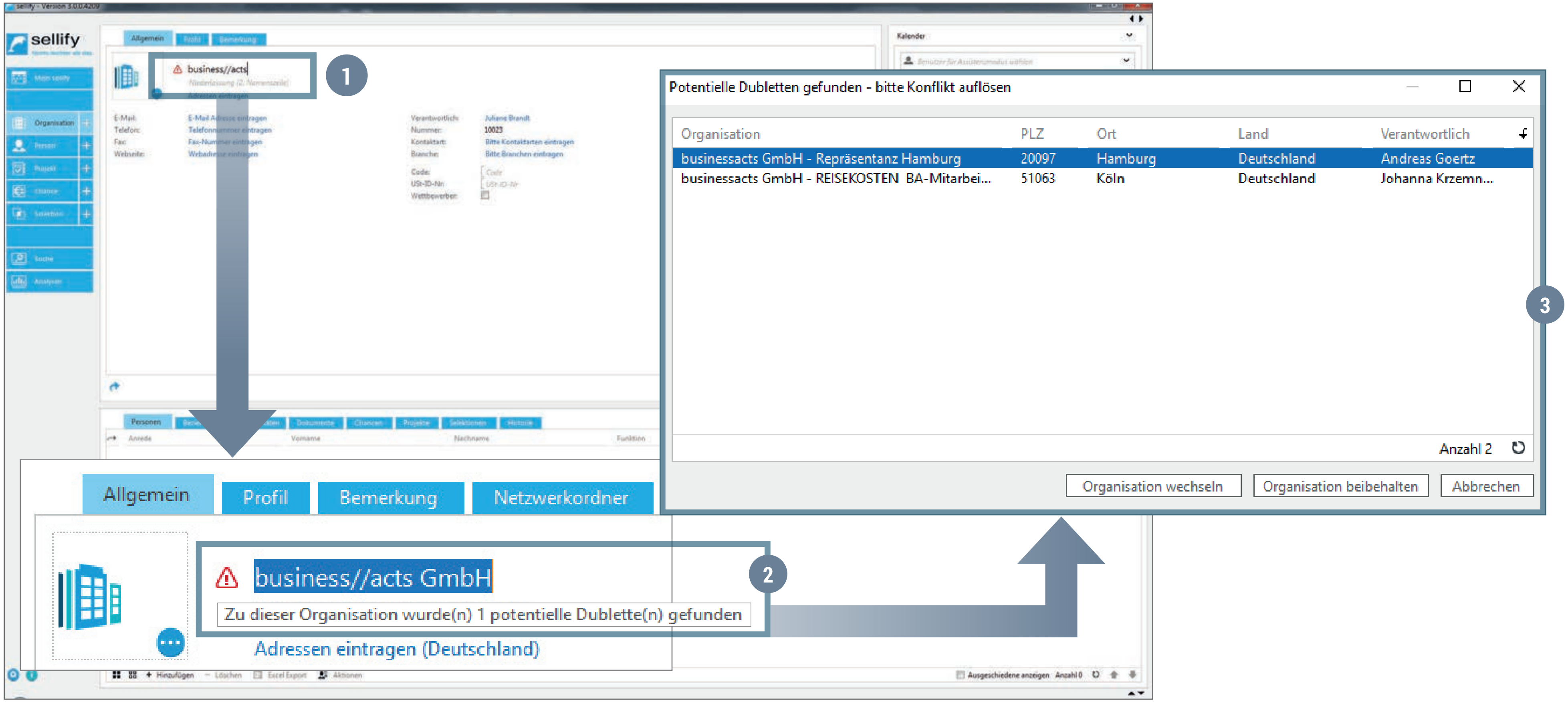




The map view for organizations and persons has been extended by a dynamic adjustment of the address line in view mode. This gets its distance to the previous element automatically if no 2nd name line has been entered for an organization or a person has not saved a link to an organization.

Organizations, people, projects, opportunities, selections

Duplicate check



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)

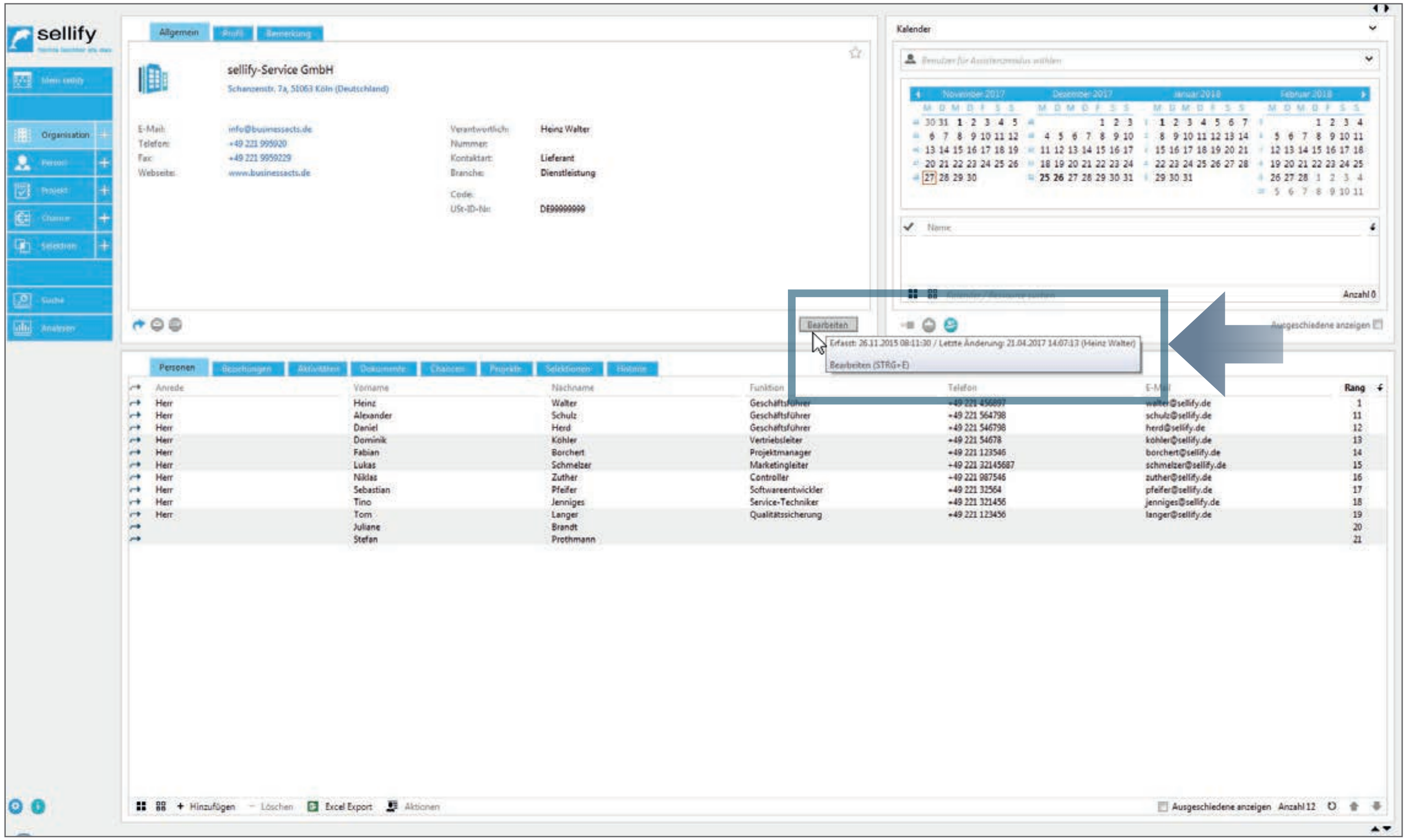
The exclamation mark signals to the user that there are potential duplicates and that this conflict must be resolved before saving. Clicking on the icon or saving the organization opens a dialog with the listed potential duplicates. (3)

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

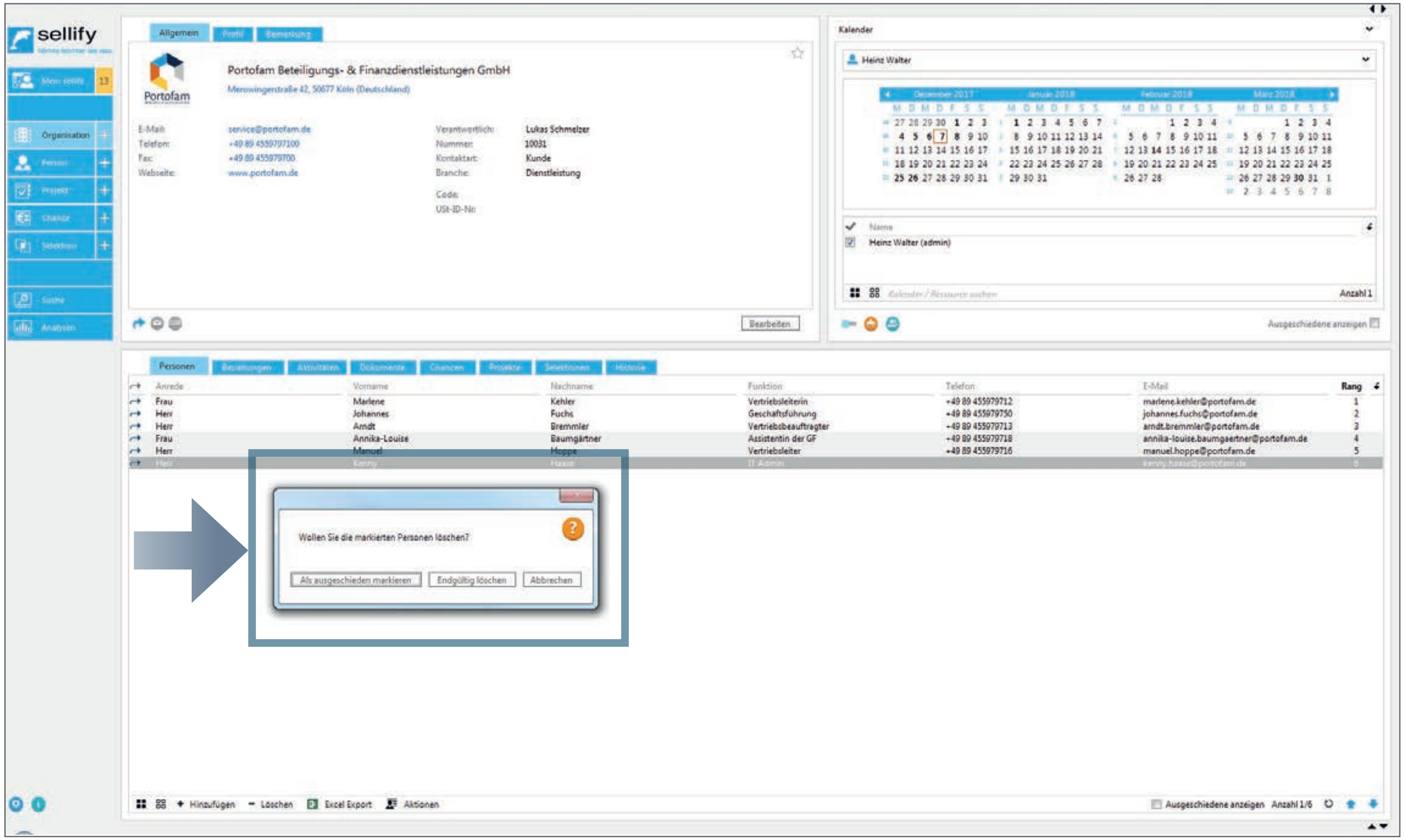


The simultaneous editing of data records has been optimized for the release of sellify 3.0. Previously, when two or more users edited the same dataset in parallel, the message 'Dataset could not be saved because another user has edited it in the meantime' was issued.

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



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.

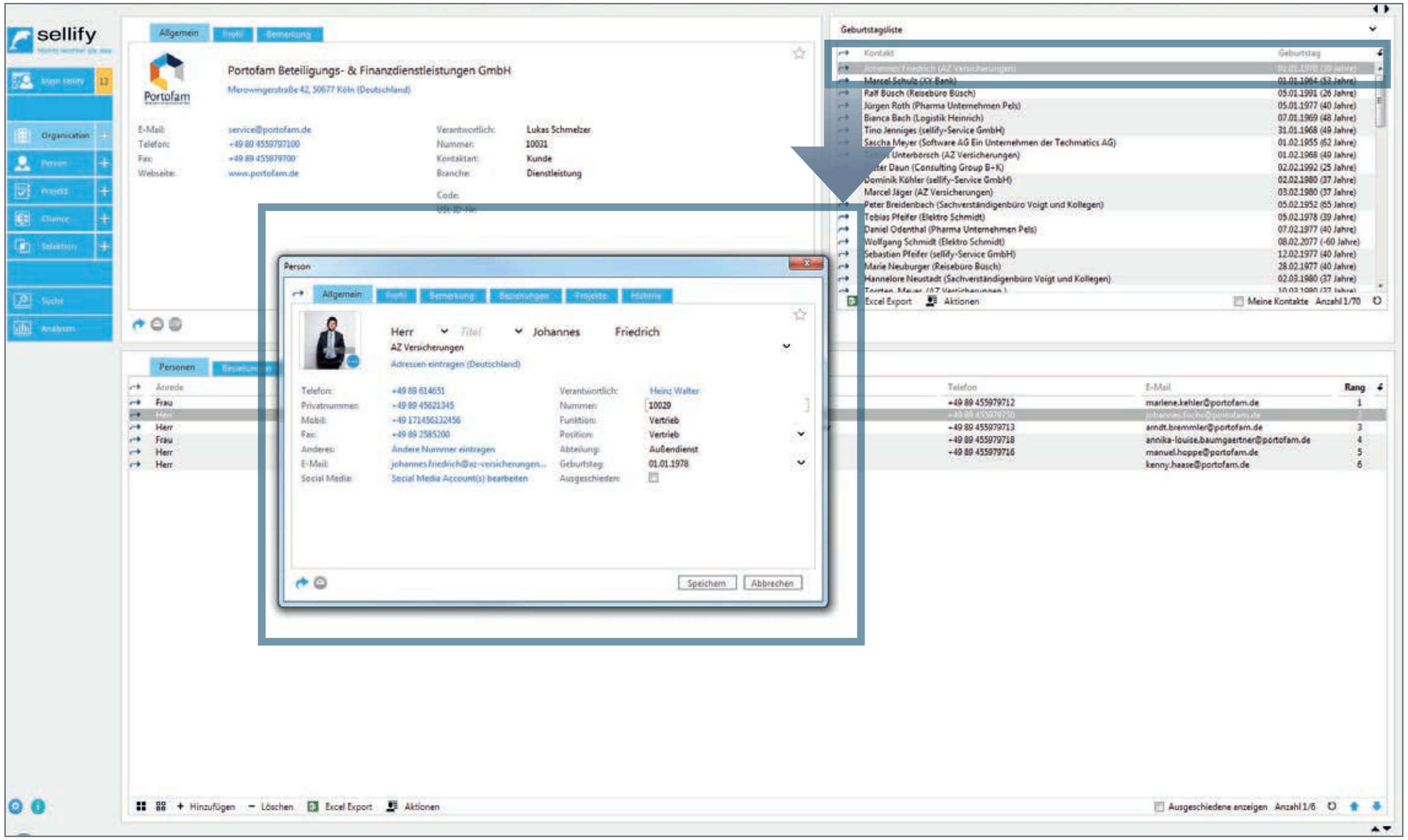
If you choose the second option, the person will be deleted and all links to the deleted person will be lost. However, the records themselves physically remain, such as for project or opportunity affiliations.

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

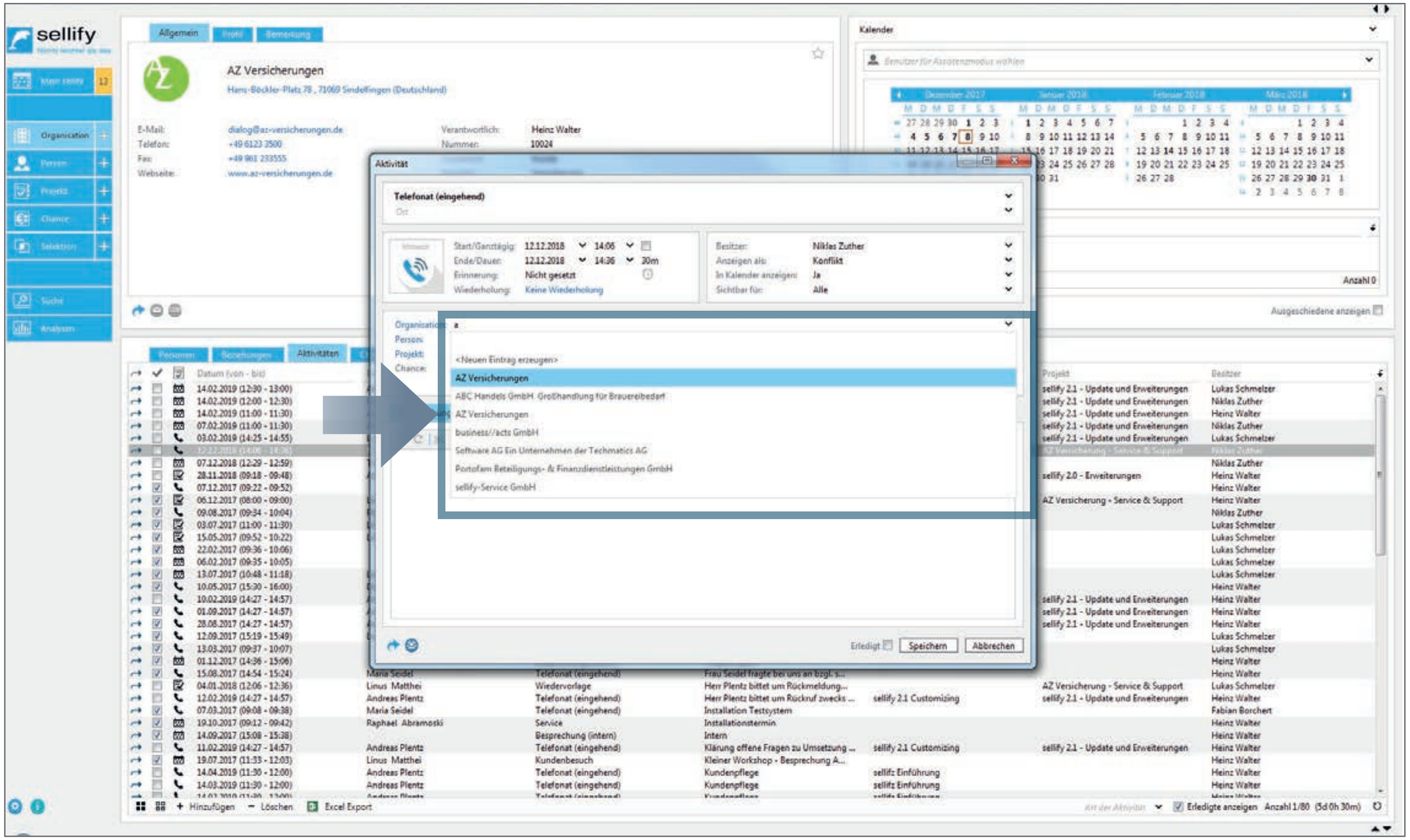
Compact view (Minicard) - Entries in birthday lists



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

Organizations, people, projects, opportunities, selections

Search results by given organization



Optimization of search results with predefined organization:

In areas where an organization can be specified in the search (e.g. opportunity map, activity dialog), the output and structuring of search results has been improved:

• First, all search hits of the specified organization are listed.

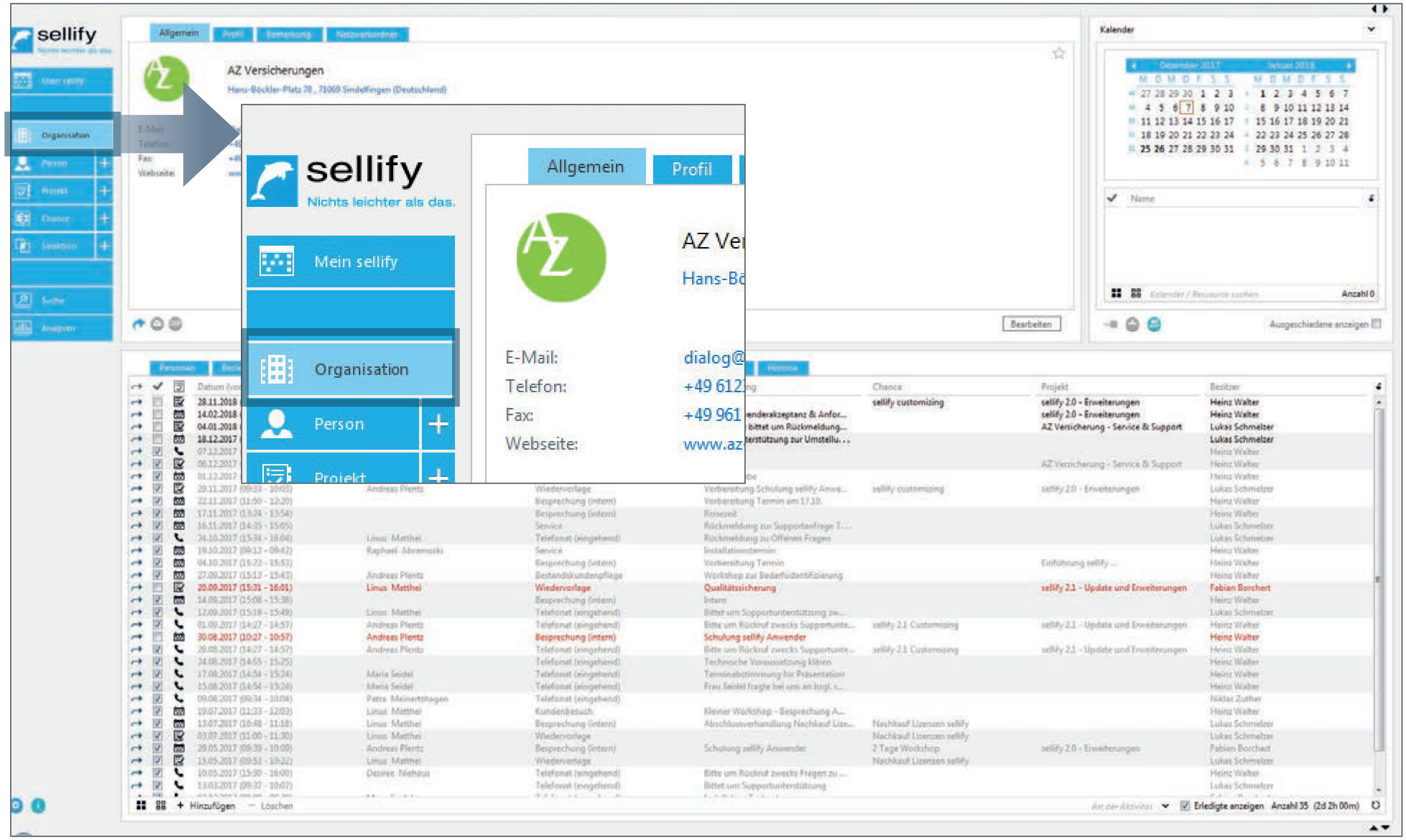
• Then the other search hits follow.

• Search hits of the specified organization do not have an organization name.

If no organization has been specified, all search hits including organization names will be listed as before.

Organizations, people, projects, opportunities, selections

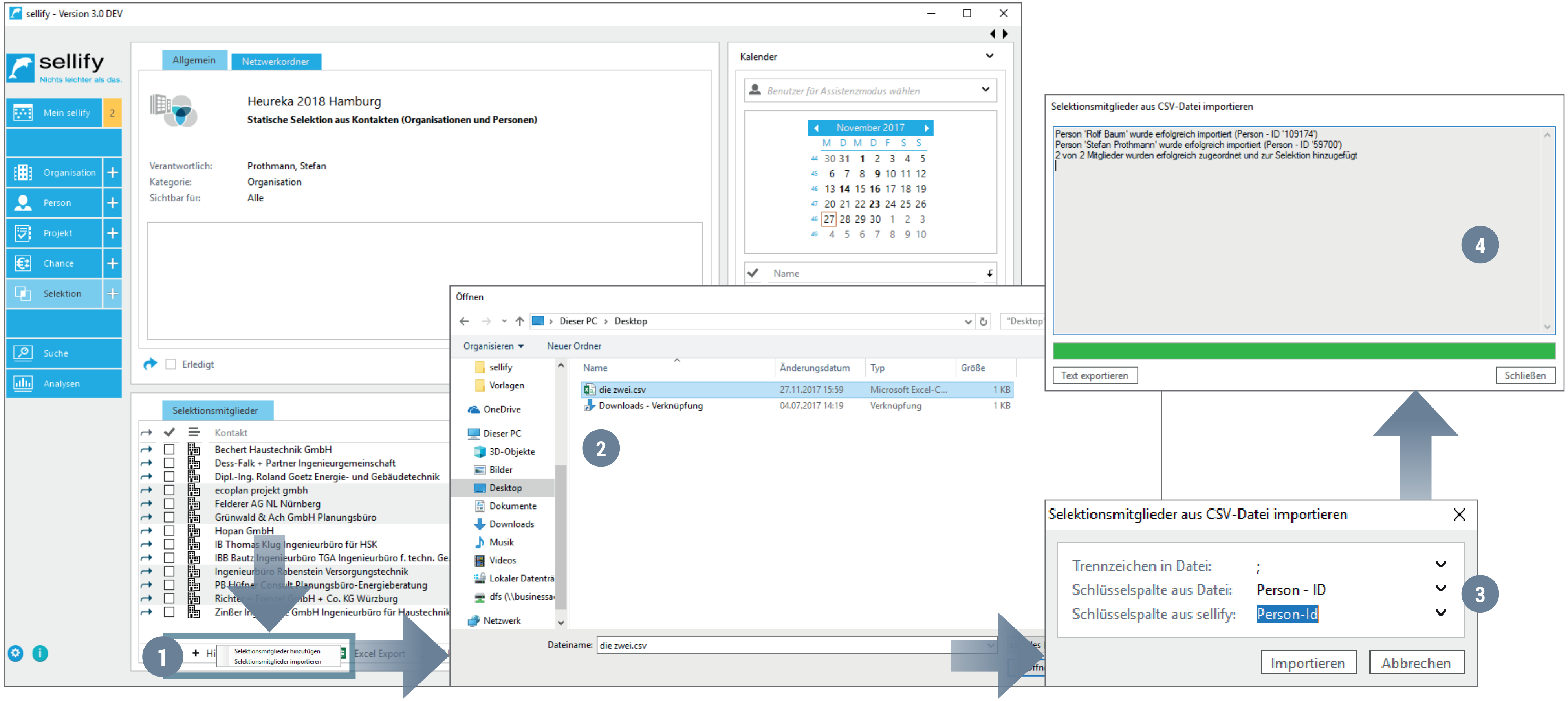
Deactivation for creating new records depending on authorization



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



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.

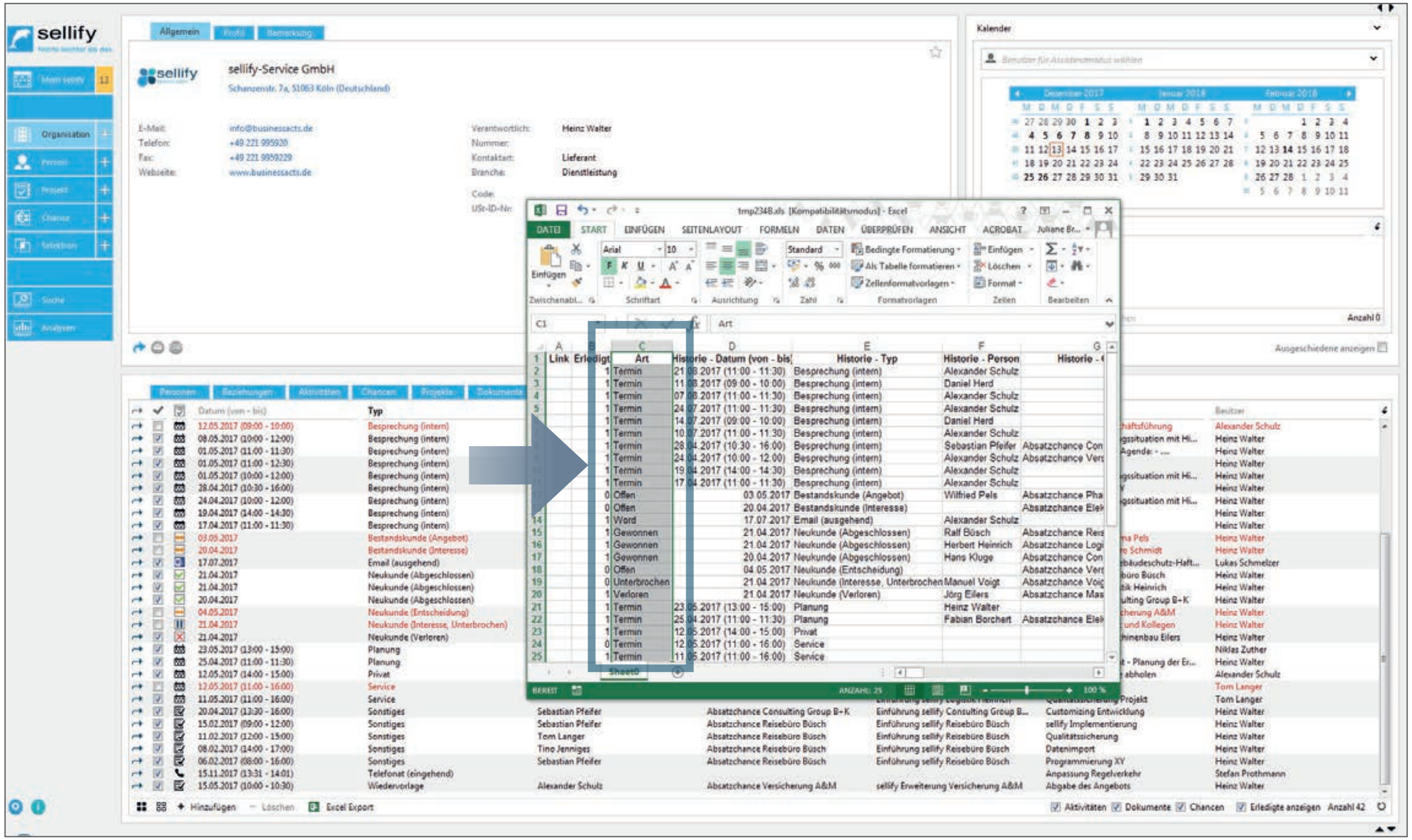
Improvement **warning message when changing cards**: If an organization card is in edit mode, the user receives the warning message "The organization is still being edited. Do you want to save the changes and continue?". After confirming this message, the user exits the edit mode and changes the map.

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

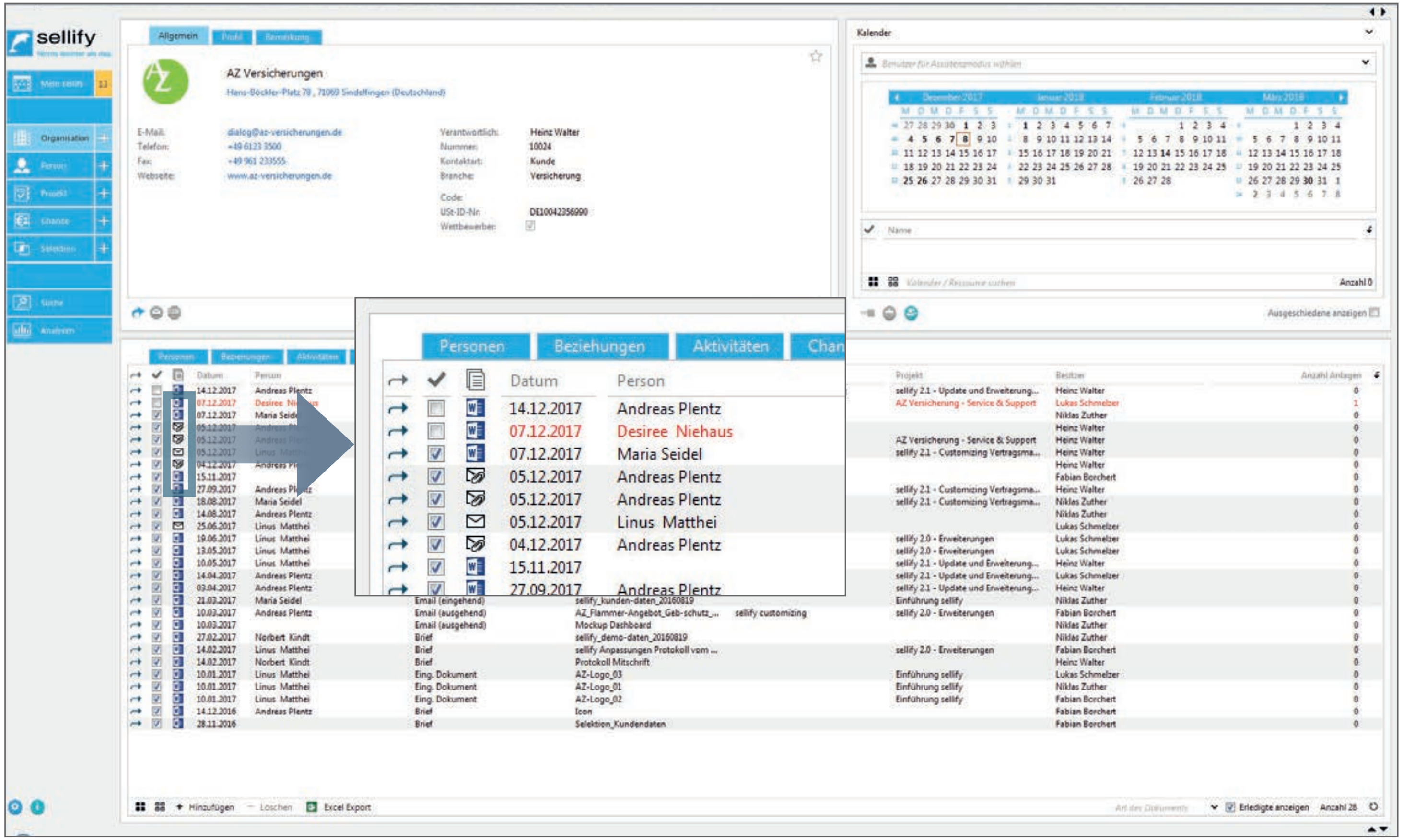


The columns of the type icons in the archive views of activities (appointment, phone call, task) and documents (Word, PDF, e-mail, etc.) are now transferred as text information in the Excelexport.

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

Activities & Documents

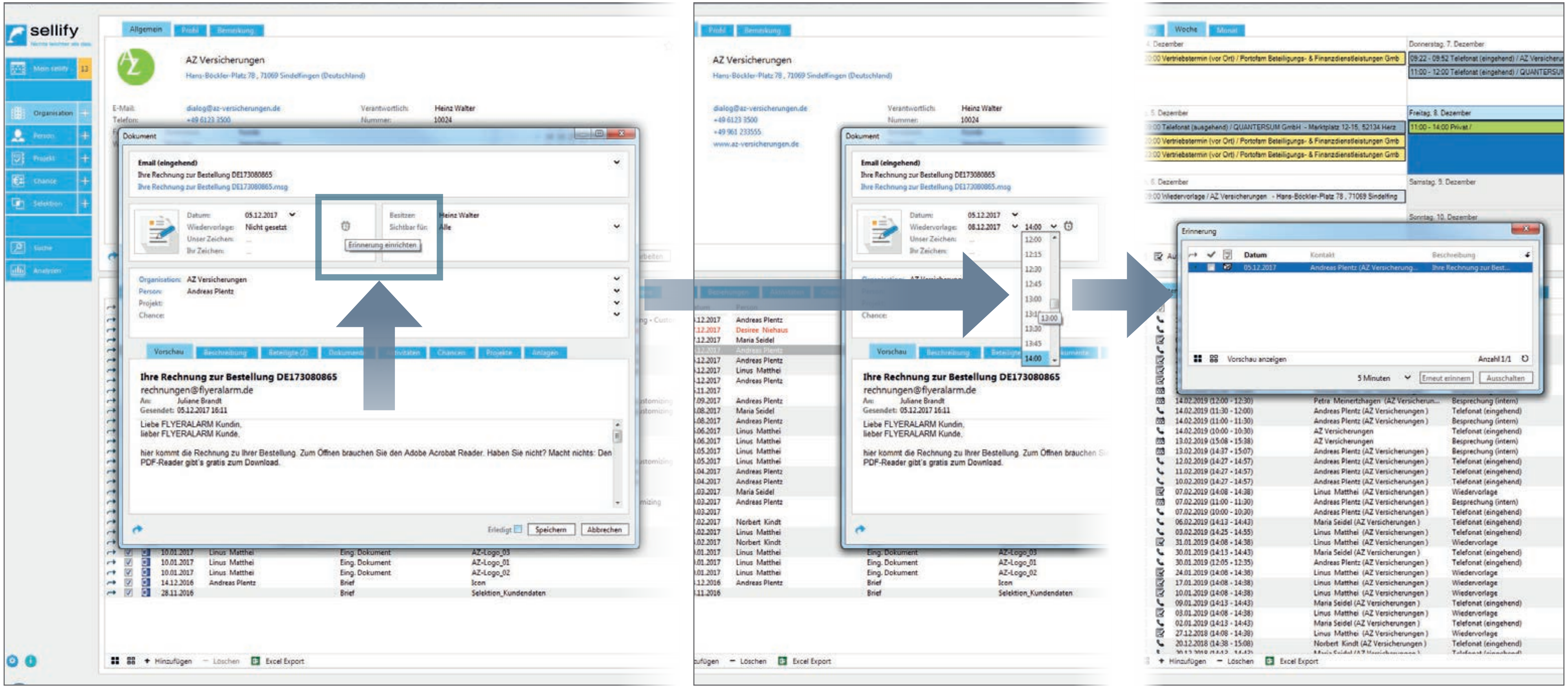
Distinction between e-mails with and without attachments



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



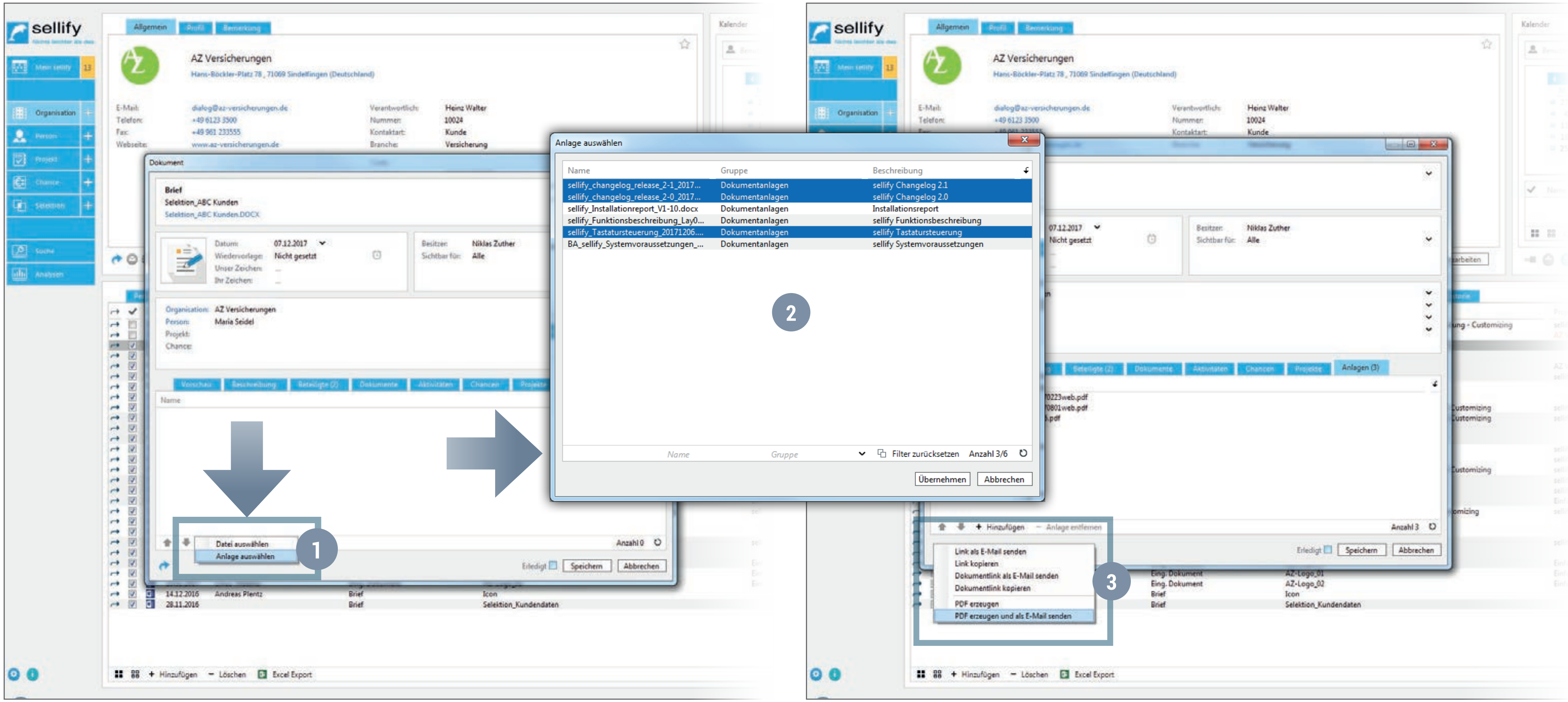
For sellify 3.0, analogous to the activities, reminders for not completed documents are now also available.

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.

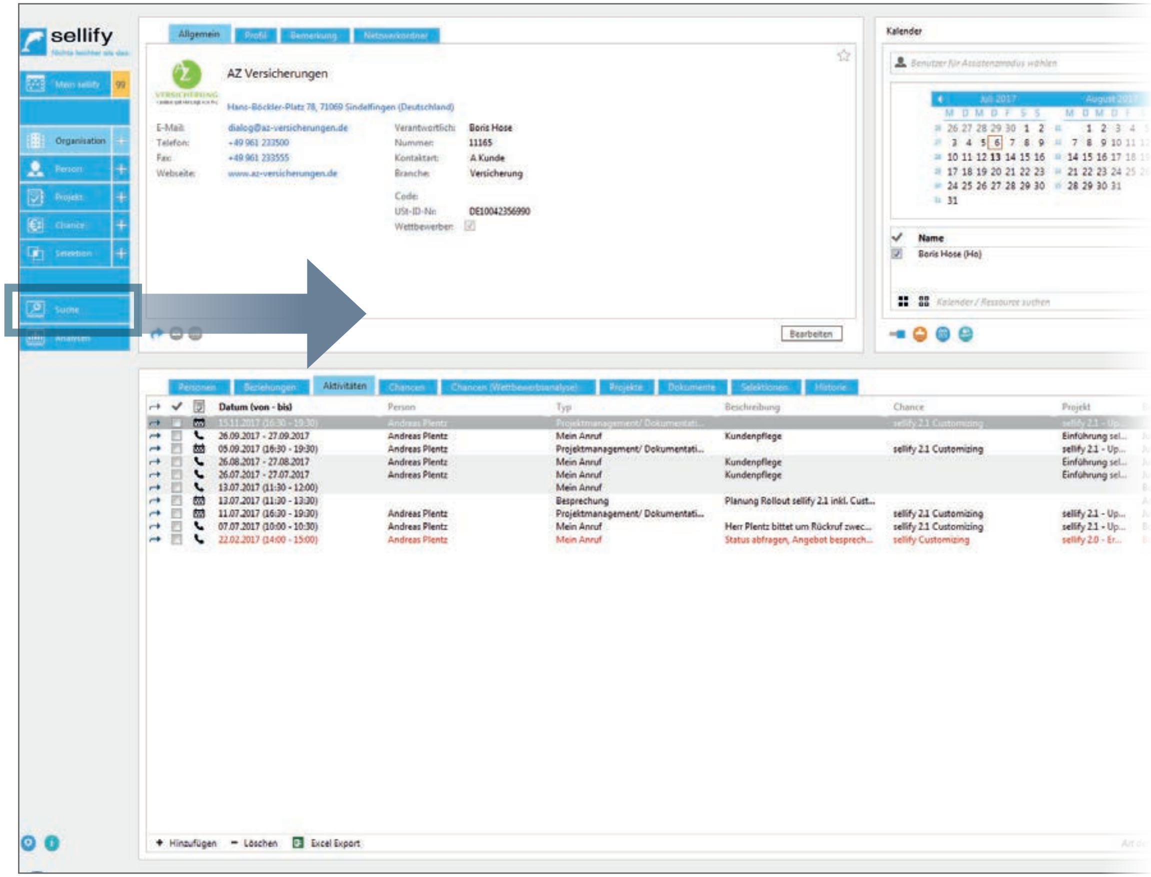
In the document dialog under attachments, select 'Select attachments' under Add. (1)

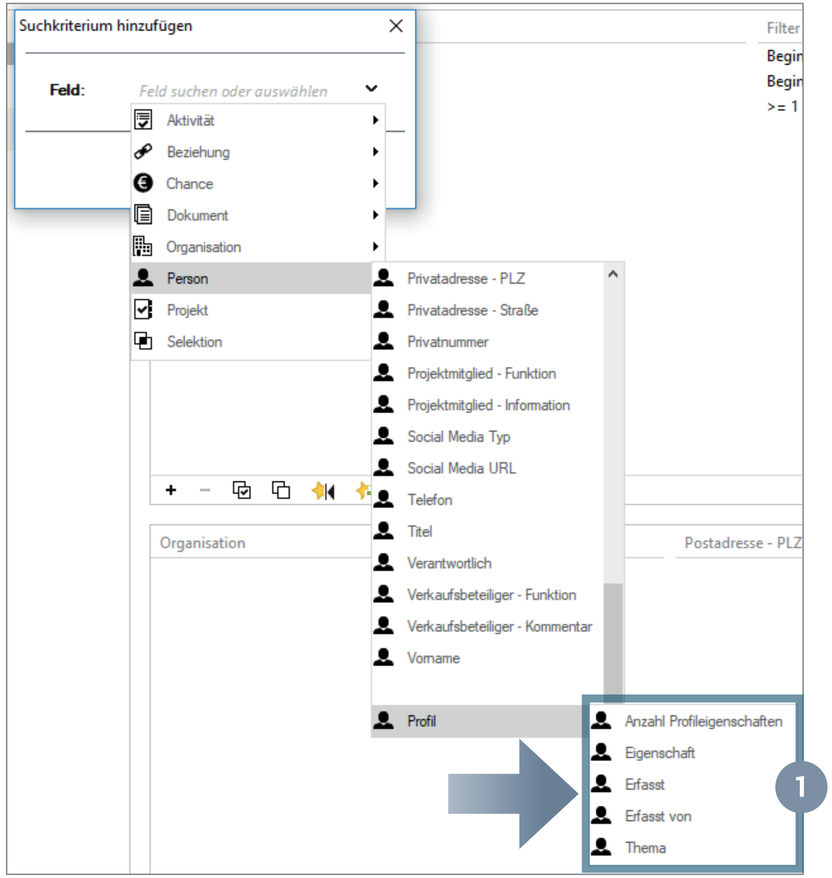
Using the dialog, you as the user decide which attachments are to be attached to the document to be sent. To include attachments to be sent, select the corresponding lines. With the buttons 'Select all' you can either send all attachments or exclude all attachments with 'Deselect'. (2)

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 **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)

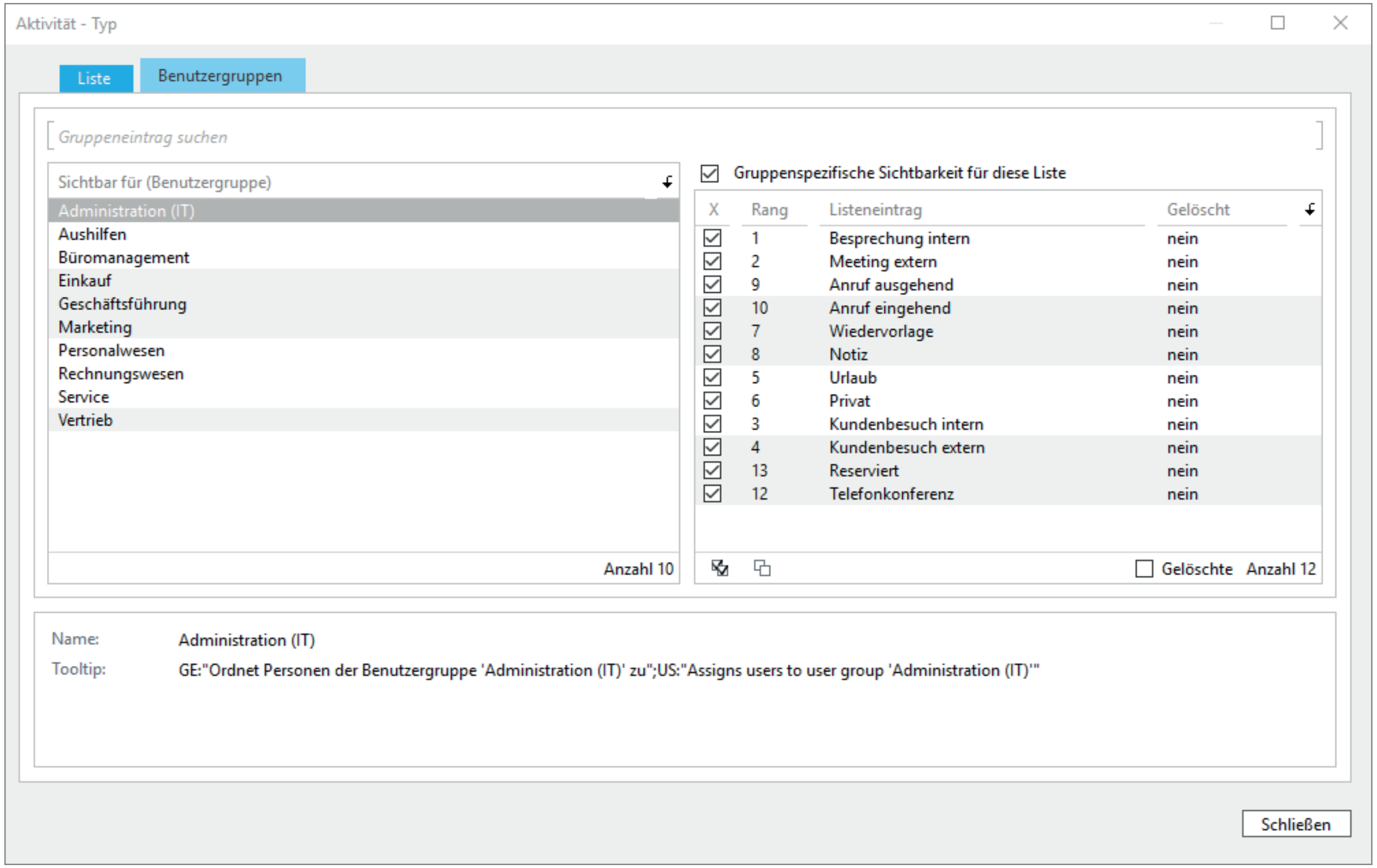
Search texts are automatically trimmed (removal of blanks) as of sellify 3.0, so that relevant entries are always found.

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.

sellify//admin

Handling of list management for user groups



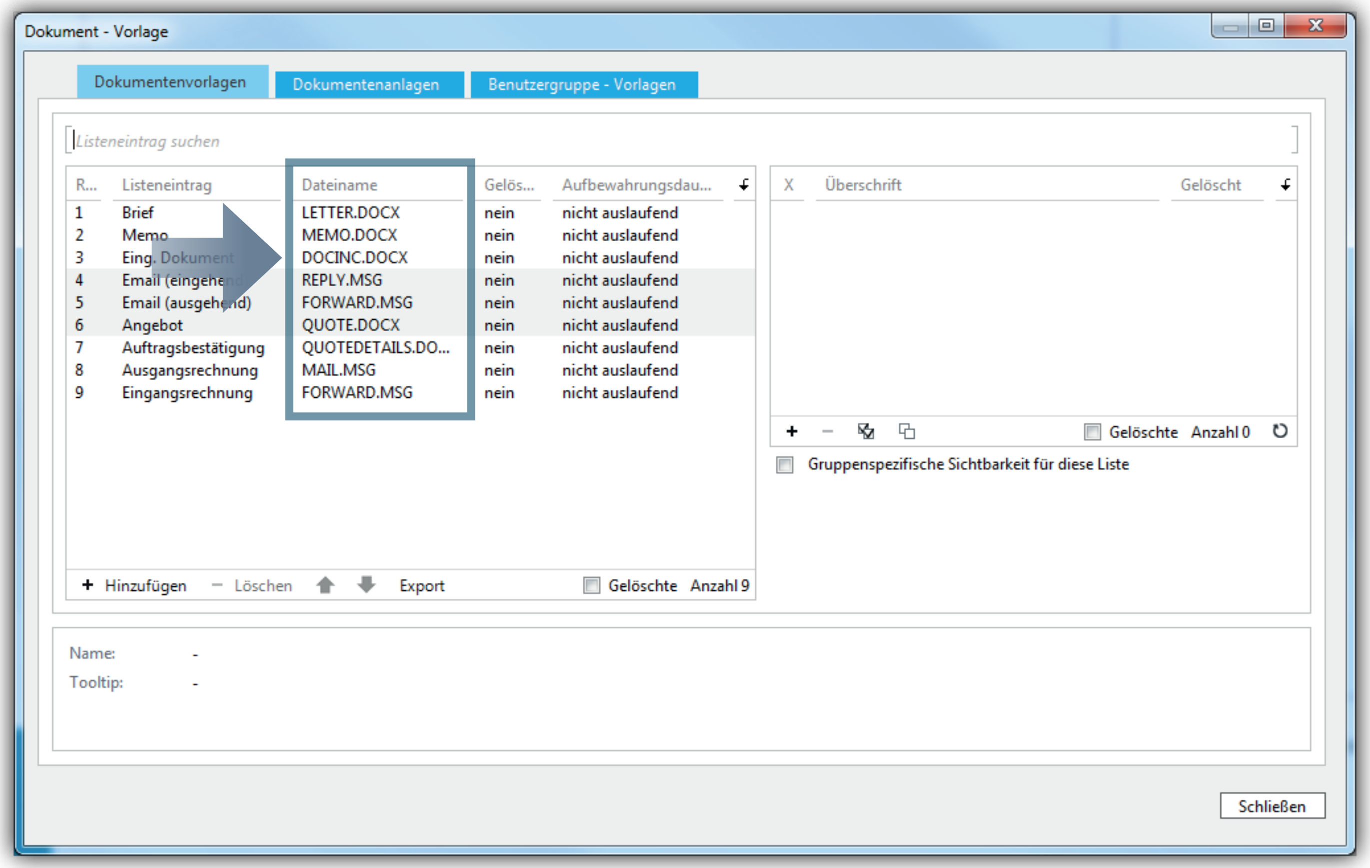
The administration of lists in sellify//admin has been extended by a view "User groups", in which the assigned list entries to the individual user groups are displayed.
For this purpose, the area in sellify//admin has been re-divided.

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.

sellify//admin

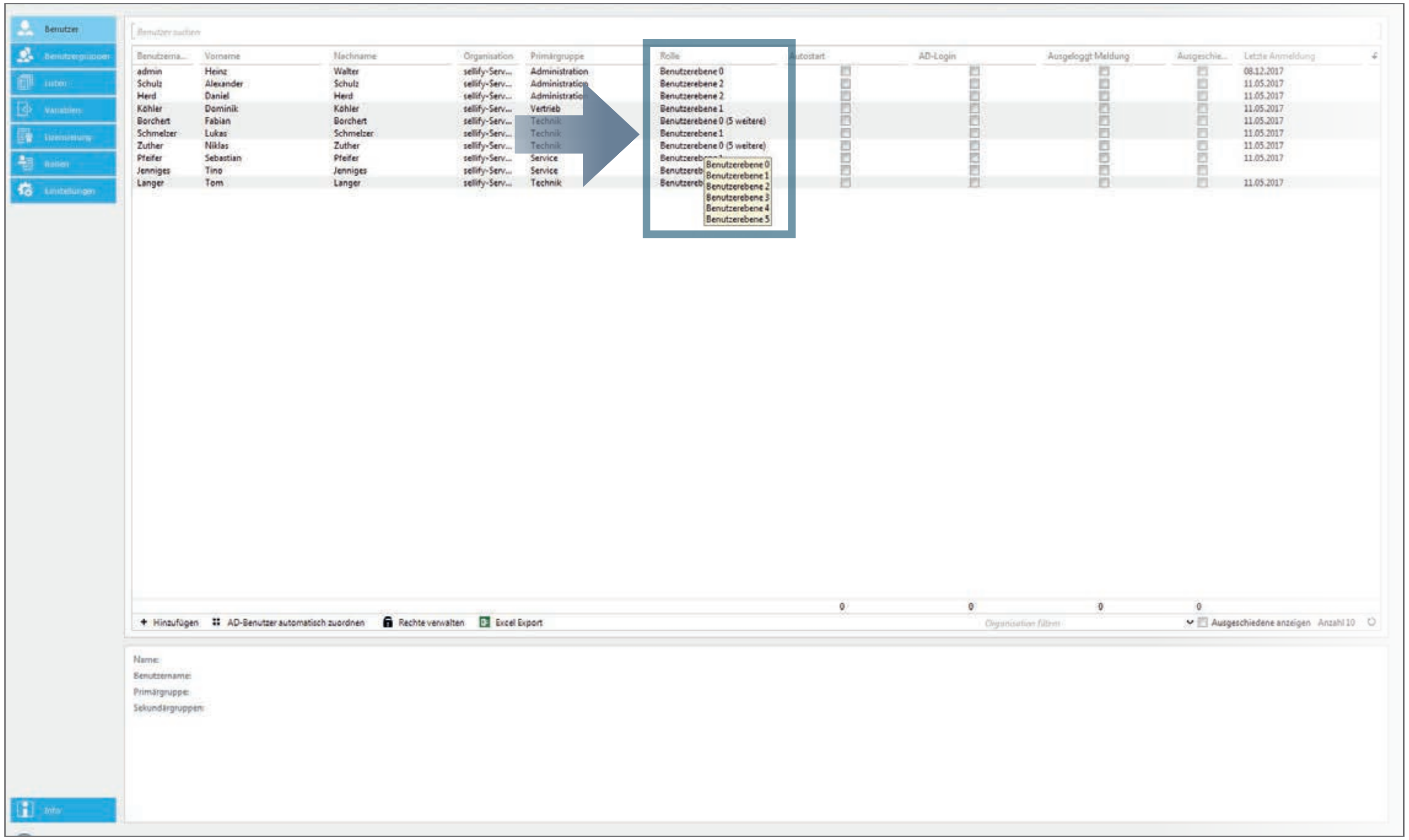
Rights management & extension of columns for list 'Document template'



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



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.

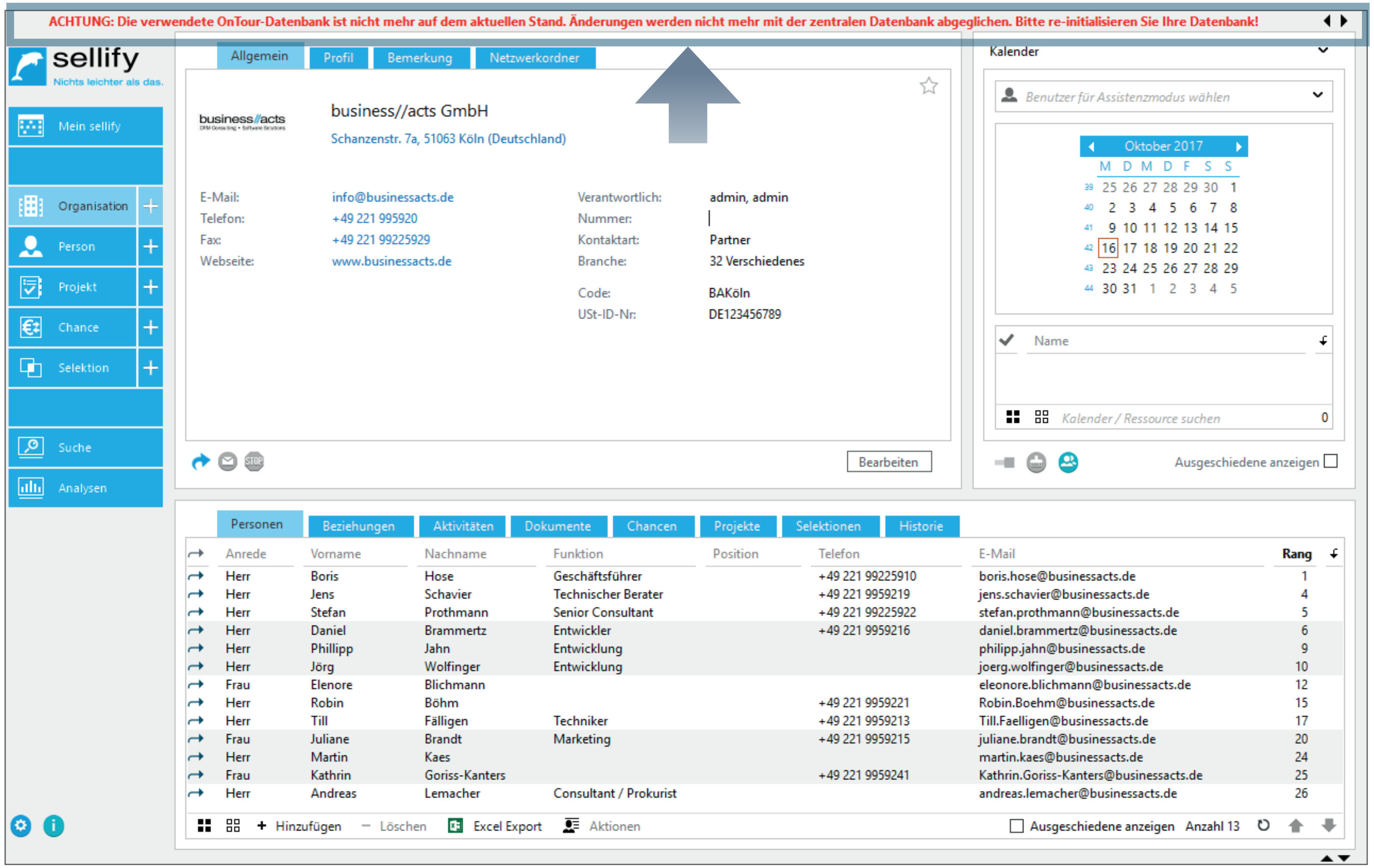
sellify//onTour has been extended for sellify 3.0 and optimized for **handling the ID assignment** for newly created objects (organization, person, project, opportunity, etc.).

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

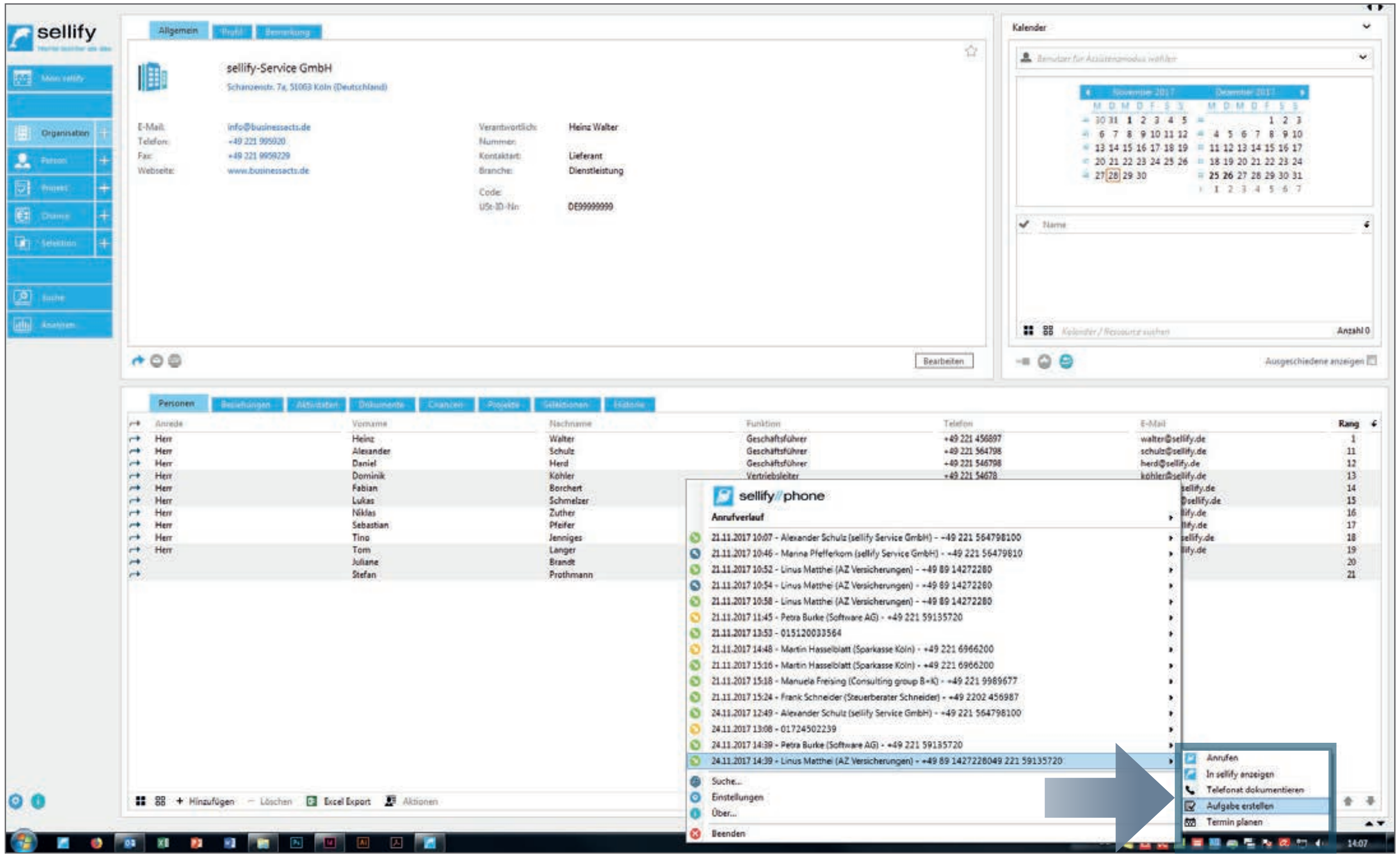


Furthermore, sellify//onTour for sellify 3.0 has been equipped with a status display for the synchronization of your data via your Windows taskbar. It will show you a percentage of progress each time you download and mount the new database into your local system. The icons show you the current status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



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 Conection** – 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
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- 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