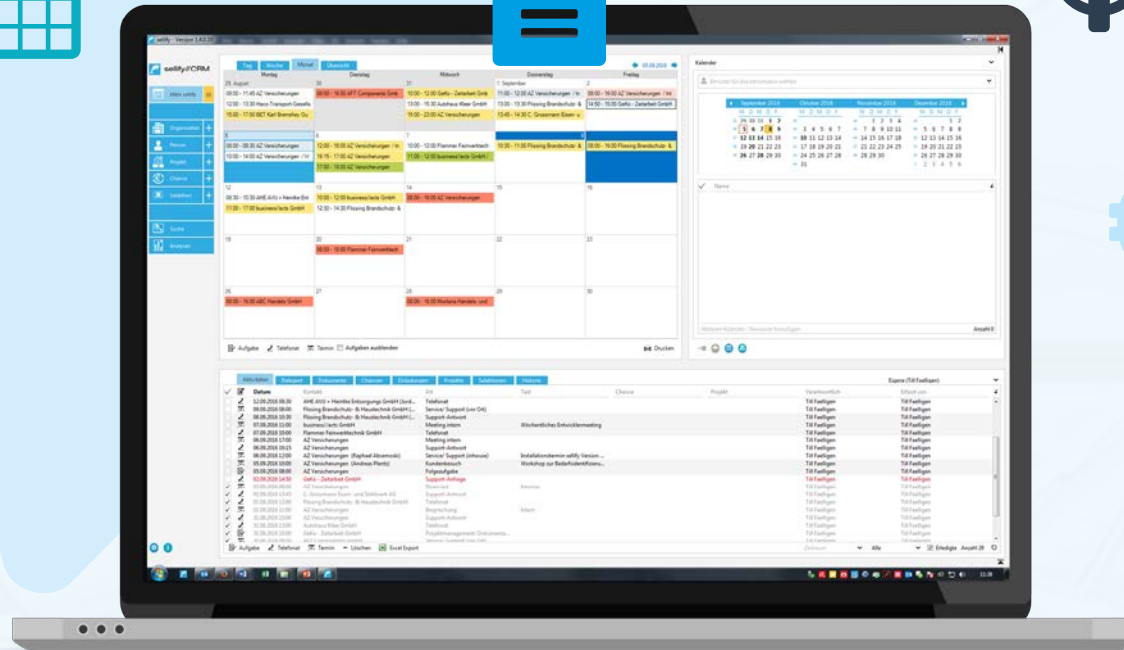




# Changelog – What's new?

Release 3.1 to 3.6 – New features, improvements, bug fixes





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## 3.1 bis 3.6

### New features & improvements

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# General

## Text boxes RichText with formatting



The screenshot displays the 'sellify' CRM interface. The main window shows the profile for 'sellify-Service GmbH'. A RichText editor is open over the company description, with a context menu showing options like 'Einfügen', 'Formatierten Text', and 'Nur den Text'. To the right, a 'Kalender' (calendar) is visible. Below the main window, a table lists employees with columns for name, function, position, telephone, mobile, and email. On the right side, a 'Vorschau' (preview) window shows a summary of a 'sellify Update 3.1' offer, including details like 'Bestandskunde', 'Angebot' (30%), and 'Angebot erstellt' (Project management 3PT, sellify Update - Installation & Services 2 PT, Customizing Aufwand 3 PT). At the bottom right, a table shows a summary of the offer with columns for 'Typ (Chance)', 'Wiedervorlage', 'Verantwortlich', 'Projekt', and 'Betrag'.

Typ (Chance)	Wiedervorlage	Verantwortlich	Projekt	Betrag
Bestandskunde		Heinz Walter	Portofam - sellify Einführung	0,00 €
Neukunde		Heinz Walter	Portofam - sellify Einführung	13.750,00 €

All text boxes (descriptions and remarks) in sellify have been enhanced with RichText formatting for version 3.1.

The RichText formatted texts are also shown to you in the preview.

# General

## Adjustment of the continuity of labels with multiple selection



The screenshot illustrates the 'General' view of a contact record in the sellify system. It shows two states: a compact view on the left and an expanded view on the right, connected by a blue arrow. The compact view displays contact details in a grid format, while the expanded view provides a more detailed layout. The contact information includes:

- Company:** Portofam Beteiligungs- & Finanzdienstleistungen GmbH
- Address:** Merowingerstraße 42, 50677 Köln (Deutschland)
- Contact Details:**
  - E-Mail (2): service@portofam.de
  - Telefon: +49 89 4559797100
  - Fax: +49 89 455979700
  - Webseite (2): www.portofam.de
- Responsible:** Lukas Schmelzer (Keine Angabe)
- Number:** 10031
- Contact Type (3):** Kunde
- Branch (2):** Dienstleistung
- Code:**
- USt-ID-Nr:**

Below the contact details, a table lists the associated persons:

Anrede	Vorname	Nachname	Funktion	Position	Telefon
Frau	Marlene	Kehler	Vertriebsleiterin	Vertrieb	+49 89 455979712
Herr	Johannes	Fuchs	Geschäftsführung	Management	+49 89 455979750
Herr	Andri	Biermiller	Vertriebsbeauftragter	Vertrieb	+49 89 455979713
Frau	Alexia-Louise	Baumgärtner	Assistentin der GF	Administration	+49 89 455979718
Herr	Manuel	Hoppe	Vertriebler	Management	+49 89 455979716
Herr	Kenny	Haese	IT Admin	Technik	+49 89 455979722

The labels for fields that can hold multiple data (e.g. phone, email, contact type, responsible) have been extended for version sellify 3.3 by the number of values in brackets. The tooltips of the data fields list all stored contents.

# General

## Adjustment of the 'Actions' button



As of sellify 3.3, the "Actions" buttons have been removed from the standard archives.

You can now access the functions completely via the respective context menus (right mouse button). More precisely, this concerns the archive views People, Project members, Opportunity members, Selection members (Map + Dialog) as well as the Minicard views 'My favorites' and 'Birthday list'.

# General

## Output of filter results in archive views



The screenshot displays the sellify CRM interface for a customer named 'AZ Versicherungen'. A search filter dialog box titled 'Suchkriterien bearbeiten' is open, showing a dropdown menu for 'Feld:' set to 'Ressource'. The 'Darstellung:' is set to 'Alle Einträge' and the 'Operator:' is also 'Alle Einträge'. Below, there are two columns for 'Verfügbare Werte' with 'Beamerz' and 'Pool-Auto' listed. The dialog shows 'Anzahl 3' for the first column and 'Anzahl 2' for the second. The background shows a calendar and a list of activities with columns for 'Personen', 'Bezeichnungen', 'Aktivitäten', 'Chancen', and 'Projekt'.

The control of column contents in archive views has been optimized for sellify 3.1:

For a column with a value listing (e.g. organization - contact type), you can now determine whether, with an activated column filter, all entries or only the values from the column filter are listed.

# General Hyperlinks in edit mode



The screenshot shows the 'sellify' CRM interface in edit mode for a contact named 'AZ Versicherungen'. The main record displays contact information such as email, phone, and website. A modal window titled 'Aktivität' is open, showing a meeting entry with details like start/end times, location, and participants. A blue arrow points from a hyperlink in the 'Personen' list to the 'Aktivität' modal.

The screenshot shows the 'sellify' CRM interface in edit mode for a contact named 'Herr Andreas Plentz'. The main record displays contact information such as phone, mobile, and email. A modal window titled 'Aktivität' is open, showing a meeting entry with details like start/end times, location, and participants. The 'Beziehungen' section is also visible, showing the relationship between the contact and the meeting.

As of version sellify 3.4, you can now also use the hyperlinks, which go directly to another record, in edit mode.

# Organizations, people, projects, opportunities, selections

## Registration of several websites in projects



The screenshot displays the 'sellify' software interface. The main window shows a project titled 'Einführung sellify Pharma Pels' with a status of 'Aktiv'. A dialog box is open, allowing the user to add website URLs to the project. The dialog has two columns: 'Webseite' and 'Beschreibung'. Two URLs are listed: 'www.pharmafels.de' and 'www.pharmafels.de/leistungen'. A blue arrow points from the 'Verantwortliche' field in the project details to the dialog box. The interface also includes a calendar view for the months of June, July, August, and September 2018, and a table of project activities at the bottom.

Datum (von - bis)	Kontakt	Typ	Beschreibung	Chance	Besitzer
19.04.2017 (12:00 - 12:30)	Wilfried Pels (Pharma Unternehmen Pels)	Sonstiges	Angebotsunterbreitung	Absatzchance Pharma Pels	Heinz Walter
14.04.2017 (12:00 - 16:00)	Wilfried Pels (Pharma Unternehmen Pels)	Besprechung (extern)	2. Ortstermin - Denition Anforderungen sellify	Absatzchance Pharma Pels	Heinz Walter
13.04.2017 (11:50 - 12:20)	Wilfried Pels (Pharma Unternehmen Pels)	Telefonat (ausgehend)	Rückruf Herr Pels - Interesse an XY - Ortster...	Absatzchance Pharma Pels	Heinz Walter
03.04.2017 (14:00 - 14:30)	Wilfried Pels (Pharma Unternehmen Pels)	Telefonat (eingehend)	Interesse an Produkt XY - Kontakt über FC Ko...	Absatzchance Pharma Pels	Heinz Walter

Projects have been optimized for sellify 3.1.

Thus, it is now possible to specify multiple websites for a project. As with organizations or persons, you can now specify any number of website URLs via the control.



# Organizations, people, projects, opportunities, selections

## Marking competitors as contact type



The screenshot shows the 'sellify' interface with a contact profile for 'Bitware Software & Dienstleistungen GmbH'. A dialog box titled 'Kontaktarten zuweisen' is open, showing a list of contact types on the left and 'Wettbewerber' selected on the right. A blue arrow points from the 'Wettbewerber' entry to the 'Wettbewerber' field in the dialog. A circled '1' is next to the 'Wettbewerber' entry.

The screenshot shows the 'sellify' interface with a project profile for 'sellify Erweiterung Angebotsworkflow'. A dialog box titled 'Beteiligte hinzufügen' is open, showing a list of contacts on the left and 'Wettbewerber' selected in the 'Funktion auswählen' dropdown on the right. A blue arrow points from the 'Wettbewerber' entry in the dropdown to the 'Wettbewerber' field in the dropdown. A circled '2' is next to the 'Wettbewerber' entry.

Version sellify 3.3 allows you to use 'Competitor' consistently via the contact type for organizations: You no longer mark a competitor (organization) via the checkbox, but via the entry 'Competitor' under contact type. (1)

The organizations marked in this way will then be offered to you for selection in the relevant places, including in the link dialogs under Opportunity - 'Competitor' function. (2)

# Organizations, people, projects, opportunities, selections

## Unification of map views



**sellify**  
Nichts leichter als das.

Mein sellify 12

Organisation +  
Person +  
Projekt +  
Chance +  
Selektion +

Suche  
Analysen

Allgemein Profil Bemerkung \* Netzwerkordner

**AZ Versicherungen**  
Hans-Böckler-Platz 78, 71069 Sindelfingen (Deutschland)

2012 umfirmiert, vormalis: Alpha Versicherungs- und Makler GmbH

Personen	Beziehungen	Aktivitäten	Chancen	Projekte	Dokumente	Selektionen	Historie
Datum	Person	Typ	Betreff				
14.12.2017	Andreas Plentz	Memo	Planung Projektmanagement - sellify...				
07.12.2017	Desiree Niehaus	Brief	E-Mail Vorlage				
07.12.2017	Maria Seidel	Brief	Selektion_ABC Kunden				
05.12.2017	Andreas Plentz	Email (eingehend)	Ihre Rechnung zur Bestellung DE173...				
05.12.2017	Andreas Plentz	Email (ausgehend)	Ihre Rechnung zur Bestellung DE173...				
05.12.2017	Linus Matthei	Email (ausgehend)	Lead Machine CRM F lead 0106628 [...]				
04.12.2017	Andreas Plentz	Email (eingehend)	Rechnung 119 / 2017				
15.11.2017	Andreas Plentz	Eing. Dokument	Anforderungsbeschreibung Berichts...				
27.09.2017	Andreas Plentz	Eing. Dokument	Erweiterung Vertragsmanagement				
18.08.2017	Maria Seidel	Email (ausgehend)	sellify CS Dokumentation_20170912				
14.08.2017	Andreas Plentz	Brief	Zusammenfassung Besuchstermin v...				
25.06.2017	Linus Matthei	Email (ausgehend)	Versicherungsschutz 2017/18				
19.06.2017	Linus Matthei	Brief	sellify Kalender Einstellungen - Anp...				
13.05.2017	Linus Matthei	Brief	MockUp - Anp				
10.05.2017	Linus Matthei	Email (ausgehend)	sellify Customizing - Vertragsmanag...				
14.04.2017	Andreas Plentz	Memo	Besprechungsprotokoll vom 27.03.2...				
03.04.2017	Andreas Plentz	Email (eingehend)	Anforderungen Customizing Vertrag...				
21.03.2017	Maria Seidel	Email (eingehend)	sellify_kunden-daten_20160819				
10.03.2017	Andreas Plentz	Email (ausgehend)	AZ_Flammer-Angebot_Geb-schutz_...				
10.03.2017	Andreas Plentz	Email (ausgehend)	Mockup Dashboard				
27.02.2017	Norbert Kindt	Brief	sellify_demo-daten_20160819				

**sellify**  
Nichts leichter als das.

Mein sellify 12

Organisation +  
Person +  
Projekt +  
Chance +  
Selektion +

Suche  
Analysen

Allgemein Profil Bemerkung \* Netzwerkordner DSGVO

**Herr Andreas Plentz**  
AZ Versicherungen  
Hans-Böckler-Platz 78, 71069 Sindelfingen (Deutschland)

vormalis Vertriebsleiter bei congenialis Versicherungs- und Makler GmbH (2009 bis 2012)

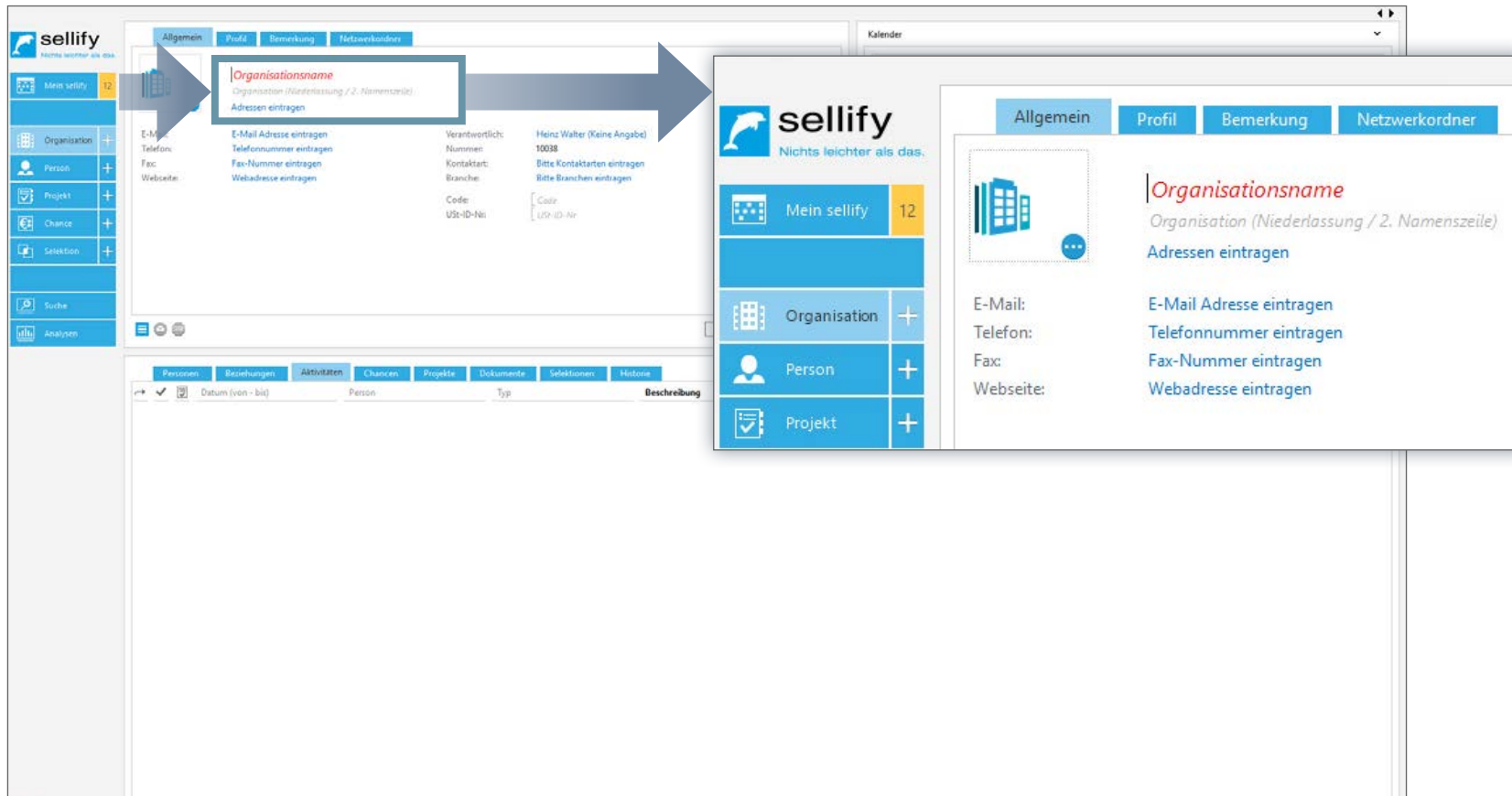
Beziehungen	Aktivitäten	Dokumente	Chancen	Projekte	Selektionen	Historie
Datum (von - bis)	Typ	Beschreibung				
14.04.2019 (11:30 - 12:00)	Telefonat (eingehend)	Kundenpflege				
15.03.2019 (14:54 - 15:24)	Wiedervorlage	Rücksprache mit Entwicklung bzgl...				
14.03.2019 (11:30 - 12:00)	Telefonat (eingehend)	Kundenpflege				
14.02.2019 (12:30 - 13:00)	Besprechung (intern)					
14.02.2019 (11:30 - 12:00)	Telefonat (eingehend)	Kundenpflege				
14.02.2019 (11:00 - 11:30)	Besprechung (intern)					
13.02.2019 (14:37 - 15:07)	Besprechung (intern)	Projektmanagement/Dokumentatio...				
12.02.2019 (14:27 - 14:57)	Telefonat (eingehend)	Herr Plentz bittet um Rückruf zweck...				
11.02.2019 (14:27 - 14:57)	Telefonat (eingehend)	Klärung offene Fragen zu Umsetzun...				
10.02.2019 (14:27 - 14:57)	Telefonat (eingehend)	Bitte um Rückruf zwecks Supportun...				
07.02.2019 (11:00 - 11:30)	Besprechung (intern)					
07.02.2019 (10:00 - 10:30)	Telefonat (eingehend)	Kundenpflege				
30.01.2019 (12:05 - 12:35)	Telefonat (eingehend)	Status abfragen, Angebot bespreche...				
10.12.2018 (14:03 - 14:33)	Besprechung (intern)	Vorbereitung Schulung sellify Anw...				
09.12.2018 (14:03 - 14:33)	Besprechung (intern)	sellify/admin - Anpassungen, Erwe...				
28.11.2018 (09:18 - 09:48)	Wiedervorlage					
14.02.2018 (12:03 - 12:33)	Bestandskundenpflege	Status Anwenderakzeptanz & Anfor...				
29.11.2017 (09:33 - 10:03)	Wiedervorlage	Vorbereitung Schulung sellify Anw...				
27.09.2017 (15:13 - 15:43)	Bestandskundenpflege	Workshop zur Bedarfsidentifizierung...				
01.09.2017 (14:27 - 14:57)	Telefonat (eingehend)	Bitte um Rückruf zwecks Supportun...				
30.08.2017 (10:27 - 10:57)	Besprechung (intern)	Schulung sellify Anwender...				

All map views have a separate 'Remark' tab with the release sellify 3.3. The remark fields in the 'General' tab in the Project, Opportunity and Selection cards have therefore been removed.

In the search function (DKS), the search criterion 'Remark' is available accordingly.

# Organizations, people, projects, opportunities, selections

Field order for new records



When you create a new record in sellify, the cursor is always active in the first field. This applies to the new creation of organizations, persons, projects, opportunities/procedures, selections, activities and documents. (as of version 3.4)

# Organizations, people, projects, opportunities, selections

Automatic assignment of the country of associated organizations when creating new people



The screenshot displays the sellify CRM interface. The main profile shows the organization 'Portofam Beteiligungs- & Finanzdienstleistungen GmbH' with contact details. A 'Person' dialog box is open, showing the 'Allgemein' tab. A blue arrow points from the organization name in the main profile to the 'Anrede' field in the dialog box. The organization name is also visible in the 'Nachname' field. The main profile shows contact information for 'Portofam Beteiligungs- & Finanzdienstleistungen GmbH' and a list of people. The calendar shows a view for 2018 with a search bar for resources.

For newly created persons, as of sellify 3.1, the country of the associated organization is adopted by default.

Only if you create the person without an organization, the country will be selected which was stored as default value in sellify//admin.

If you have assigned a country to a person that differs from the associated organization and now assign it to another organization, the country of the new organization is not changed here.

The previously selected country remains assigned to the person, which you can change manually.

# Activities & Documents

New status 'Did not take place' for appointments & phone calls



The screenshot displays the sellify CRM interface. On the left, there's a navigation sidebar with options like 'Organisation', 'Person', 'Projekt', 'Chance', 'Selektio...', 'Suche', and 'Analyse'. The main area shows the profile of 'AZ Versicherungen' with contact details and a calendar. Below this is a table of activities with columns for 'Datum (von - bis)', 'Person', 'Typ', 'Beschreibung', 'Chance', 'Projekt', 'Besitzer', and 'Gesamtaufwand'. A large grey arrow points to the 'Status' column, which contains checkboxes for 'Done' (checked) and 'Did not take place' (unchecked).

For sellify 3.1 and 3.3 respectively, appointments and phone calls have been supplemented by an additional status:

Here you can now set a new status "Did not take place". In the archive view you can set this status via the context menu or the checkbox. In the activity slide log you control the status via the new hyperlink label 'Done', which opens the status selection via context menu. The checkbox in the dialog switches only between 'Done' and 'Undone'. In the archive views, a separate icon is displayed for all statuses:

- Did not take place
- Done
- Undone

# Activities & Documents

## Summary for activities and documents



The screenshot displays the sellify software interface. On the left is a navigation sidebar with icons for 'Organisation', 'Person', 'Projekt', 'Chance', 'Selektion', 'Suche', and 'Analyse'. The main area shows the profile of 'Portofam Beteiligungs- & Finanzdienstleistungen GmbH'. A calendar view is visible in the top right. Two dialog boxes are open: one for 'Vertriebstermin (vor Ort)' and another for 'Zusammenfassung' (Summary). The summary dialog lists activities and documents chronologically.

Activity/Document	Date	Participant
30.04.2018 (Ende)   Projekt: Kundenprojekt (Vorbereitung)   portofam - sellify Einführung	30.04.2018	Heinz Walter
05.12.2017 (10:00 - 20:00)   Aktivität: Vertriebstermin (vor Ort)   Marlene Kehler (Portofam Beteiligungs- & Finanzdienstleistungen GmbH)	05.12.2017	Marlene Kehler

In the dialogs for activities and documents, a new "Summary" tab is available as of sellify 3.2.

In this you will see the links to activities, documents, projects and opportunities listed chronologically.

# Activities & Documents

## Reminders for documents



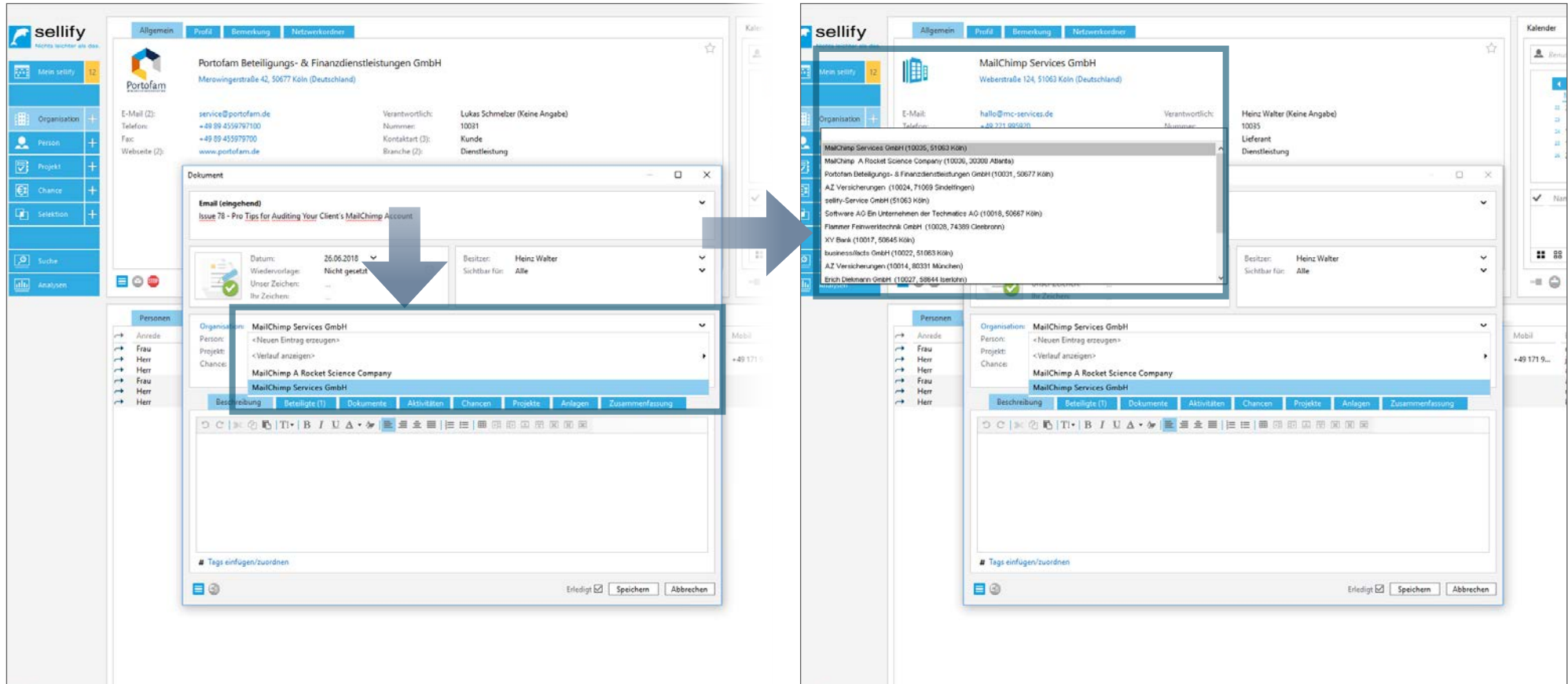
The screenshot displays the sellify software interface. The main window shows a document titled "Memo" with the subject "Planung Projektmanagement - sellify Customizing". The document is currently marked as "Nicht gesetzt" (Not set). A dialog box is open, allowing the user to set a reminder. The reminder is set for the date 25.06.2018 at 17:00. The document is owned by Heinz Walter and is visible to everyone. The document content includes a greeting to Herr Plentz and mentions "AZ Versicherungen" and "Vertriebsleiter". The "Erledigt" (Completed) checkbox is checked, and the "Speichern" (Save) button is highlighted.

Starting with sellify 3.3, you can also activate the reminder function directly for "documents marked as done".

To do this, click on the alarm clock icon in the document dialog as usual and set the desired reminder. If the reminder is activated, the document will be marked as undone.

# Activities & Documents

## E-mail archiving - toggle function for contact selection



If more than one hit is suggested in the contact selection dialog when archiving an e-mail, you can switch to the determined data records in the background using the usual jump function from sellify 3.5. In this way, you can check with a single click whether the contact displayed corresponds to the one where you want to store the e-mail.



# Search, Input & DKS

## Control of column contents



The screenshot displays the sellify CRM interface for 'Portofam Beteiligungs- & Finanzdienstleistungen GmbH'. A search criteria dialog box is open, showing the configuration for the 'Kontaktart' field. The dialog is titled 'Suchkriterium bearbeiten' and has two main sections: 'Suchkriterium bearbeiten' and 'Suchkriterium bearbeiten' (repeated). The first section shows the field 'Kontaktart', the display 'Nur Filterergebnisse', the operator 'Alle Einträge', and the group 'Nur Filterergebnisse'. The second section shows the available values 'Diverse', 'Partner', 'Verlorener Kunde', and 'Wettbewerber', and the selected values 'Interessant' and 'Kunde'. The dialog also includes options for 'Gelöschte anzeigen' and 'Anzahl'.

Bei einer Spalte mit einer Wertaufzählung (z. B. Organisation - Kontaktart) können Sie ab sellify 3.1 bestimmen, ob bei einem aktivierten Spaltenfilter alle Einträge gelistet werden oder nur die Werte aus dem Spaltenfilter.

Klicken Sie hierzu im Dialog zur Erstellung/Bearbeitung des Suchkriteriums auf das Dropdownfeld **„Darstellung“** und wählen Sie **„Alle Einträge“** oder **„Nur Filterergebnisse“**.(1)

Diese Funktion steht Ihnen analog zur DKS auch in den Archivansichten zur Verfügung – siehe Seite 6.

# Search, Input & DKS

Extension search criteria - 'Weighted amount' for opportunities



Chancen	Stufe	Person	Typ (Chance)	Wiedervorlage	Verantwortlich	Projekt	Betrag	Gewichteter Betrag
ng Ange...	Entscheidung	Manuel Hoppe	Bestandskunde	04.07.2018	Heinz Walter	Portofam - sellify Angebots...	18.340,00 €	9.124,50 €
ng	Angebot	Arndt Bremmer	Bestandskunde		Heinz Walter	Portofam - sellify Einführung	0,00 €	0,00 €
ng	Zusage	Arndt Bremmer	Neukunde		Heinz Walter	Portofam - sellify Einführung	13.759,00 €	13.759,00 €

Name	Filter
<input checked="" type="checkbox"/> Gewichteter Betrag	> 0,00 €
<input checked="" type="checkbox"/> Organisation (1. Namenszeile)	Enthält portofam

Für Chancen gibt es ab sellify 3.2 eine neue Spalte in den Archivansichten (1) sowie ein neues DKS-Suchkriterium ‚Gewichteter Betrag‘ (2). Hier wird Ihnen jeweils der Betrag der Chance multipliziert mit dem %-Teil der aktuellen Stufe ausgegeben.

Im Reiter Chancen der Archivansicht können Sie die neue Spalte über den Rechtsklick auf den Spaltenkopf und den Punkt ‚Spalten konfigurieren‘ hinzufügen.

# Search, Input & DKS

## Extension search criteria - activity 'Last activity' and 'Organization'



The screenshot shows the search interface for 'Portofam Beteiligungs- & Finanzdienstleistungen GmbH'. The search criteria are: Organisation (1), Person (4), Chance (2), Dokument, Aktivität, and Selektion. The filter 'Letzte Aktivität' is set to 'akt. Jahr +/- 1 Jahr' and 'Nächste Aktivität' is also set to 'akt. Jahr +/- 1 Jahr'. The search results table is as follows:

Organisation	Person	Kontaktart	Letzte Aktivität	Nächste Aktivität
AZ Versicherungen	Maria Seidel	Kunde	17.08.2017	12.12.2018
AZ Versicherungen	Andreas Pientz	Kunde	14.02.2018	28.11.2018
AZ Versicherungen	Linus Matthei	Kunde	04.01.2018	11.12.2018
AZ Versicherungen	Petra Meinertzhagen	Kunde	09.08.2017	14.02.2019

The screenshot shows the search interface for 'Portofam Beteiligungs- & Finanzdienstleistungen GmbH'. The search criteria are: Organisation (10), Person (10), Chance (2), Dokument, Aktivität, and Selektion. The filter 'Letztes Dokument' is set to 'akt. Jahr +/- 1 Jahr'. The search results table is as follows:

Organisation	Person	Kontaktart
Elektro Schmidt	Tobias Pfeifer	Kunde
Consulting Group B+K	Hans Kluge	Kunde
AZ Versicherungen	Maria Seidel	Kunde
AZ Versicherungen	Andreas Pientz	Kunde
AZ Versicherungen	Norbert Kindt	Kunde
AZ Versicherungen	Linus Matthei	Kunde
AZ Versicherungen	Desiree Niehaus	Kunde
Flammer Feinwerktechnik GmbH	Kurt Flammer	Kunde
Flammer Feinwerktechnik GmbH	Elica Kemper	Kunde
Flammer Feinwerktechnik GmbH	Manika Teubert	Kunde

Außerdem wurde die dynamische Komfortsuche wie folgt erweitert:

Das Kriterium ‚Aktivität - Letzte Aktivität‘ wurde angepasst. Hier wird Ihnen nun die älteste Aktivität in der Vergangenheit angezeigt und nicht mehr die älteste Aktivität, die in der Zukunft liegen könnte. Als neue Suchkriterien stehen Ihnen folgende zur Verfügung: ‚Aktivität - Nächste Aktivität‘ und ‚Dokument - Letztes Dokument. (ab sellify 3.2)

Die Spalte ‚Organisation‘ fasst jetzt ‚Organisationsname 1. Namenszeile‘ und ‚Organisation 2. Namenszeile‘ der Organisation sowohl im Suchalgorithmus als auch in der Ausgabe in einer Spalte zusammen.



Ra...	Listeneintrag	Dateiname	Gelöscht	Aufbewahrungsdauer (Monat)	Typ
214	DSGVO - 1	E-Mail.msg	nein	nicht auslaufend	E-Mail
216	DSGVO - 3	E-Mail.msg	nein	nicht auslaufend	E-Mail
217	DSGVO Löschbestätigung	DSGVO - Loeschbestatigung...	nein	nicht auslaufend	E-Mail
218	DSGVO Anonymisierungbest...	DSGVO - Anonymisierungsb...	nein	nicht auslaufend	E-Mail
219	DSGVO Personenauskunft	DSGVO - Personenauskunft...	nein	nicht auslaufend	E-Mail
221	DSGVO Einverständniserkläru...	DSGVO - Einverstendniserkla...	nein	nicht auslaufend	E-Mail
215	DSGVO - 2	LETTER.DOCK	nein	nicht auslaufend	Dokument

Rang	Listeneintrag	Gelöscht	Typ
2	Eing. Anruf	nein	Telefonat
3	Mein Anruf	nein	Telefonat

In the list management in sellify//admin the lists 'Document - Template' and 'Subsequent Task - Type' show the respective type in a separate column. (as of sellify 3.3)

To do this, simply click on one of the two entries under Lists to view the new column in the respective dialog.

# BUGFIXES

## Various



### 3.1

- **Document subject character length** - The maximum number of characters that can be stored in a document subject is now also stored in the input mask of the document dialog.
- **sellify//onTour** – An error has been fixed for the 'sellifyversion' table that caused the version not to be maintained correctly. | Attachment creation now works even if the OnTour database is enabled and the local archive path is not configured.
- **Mail merge documents** – When creating a mail merge, only the displayed or the selected records are passed. Filtered out records are never passed. The template variables for sender information now also take into account an activated assistance mode.
- **Multi-value information** – The columns that can contain multiple values (contact type, industry, responsible) now display the individual values semicolon-separated.

### 3.2

- **sellify Outlook connection** – Existing recipients now remain when adding additional recipients or distribution lists.
- **Mail merge variables** – Problems with template variables have been fixed and no longer cause the mail merge function to abort. Additionally, any misbehavior is documented in the log file.

### 3.3

- **sellify//admin** – Problems occurred when deleting user groups in the user management, which have been fixed with this version release.
- **Multiple deletion persons** – Multiple persons selected at the same time can now be deleted in one operation via the context menu.
- **Persons** – Fixed double output of the country name in the tooltip of addresses.
- **Delete appointments with multiple participants** – In the archive views of persons, only the corresponding invitation activity is now deleted. Furthermore, as a user in the archive views of organizations, you can determine the further procedure via a hint dialog: "Do you want to remove the participation in the selected activity or delete the activity permanently?"  
Selection: Remove participation / Delete permanently / Cancel
- **Activities and opportunities**, that refer to deleted objects (persons, organizations, projects and opportunities) are now set to 0 via the system setup.
- **sellify Outlook Connection** – The processing of emails based on document templates has been improved in terms of adding attachments and recipients. Aborts due to synchronization errors have been fixed. File handling during archiving has been optimized.

# BUGFIXES

Diverses



## 3.4

- **Appointment reminders** – Set reminders for the start time of appointments are now saved correctly.
- **Dynamic comfort search** – Adding and removing to selections of persons and organizations via the context menu now works without errors.
- **sellify Outlook Connection** – The 'Synchronize' button for appointments in Outlook is now hidden if the user setting 'Prevent Outlook synchronization' is not enabled in sellify//admin.

## 3.5

- **Repeat dates** – Custom recurrence dates are now correctly displayed in the calendar.
- **Organization** – All relevant tabs are now available in the dialog for Organization. | 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.
- **Template variables** – All template variables, if their content is empty, are replaced by an empty string.

## 3.6

- **Document archiving** – Special characters in the subject of a document that the operating system is not allowed to use for the file name are not included in the file name. Thus, documents with 'tab stop' in the subject can also be archived.