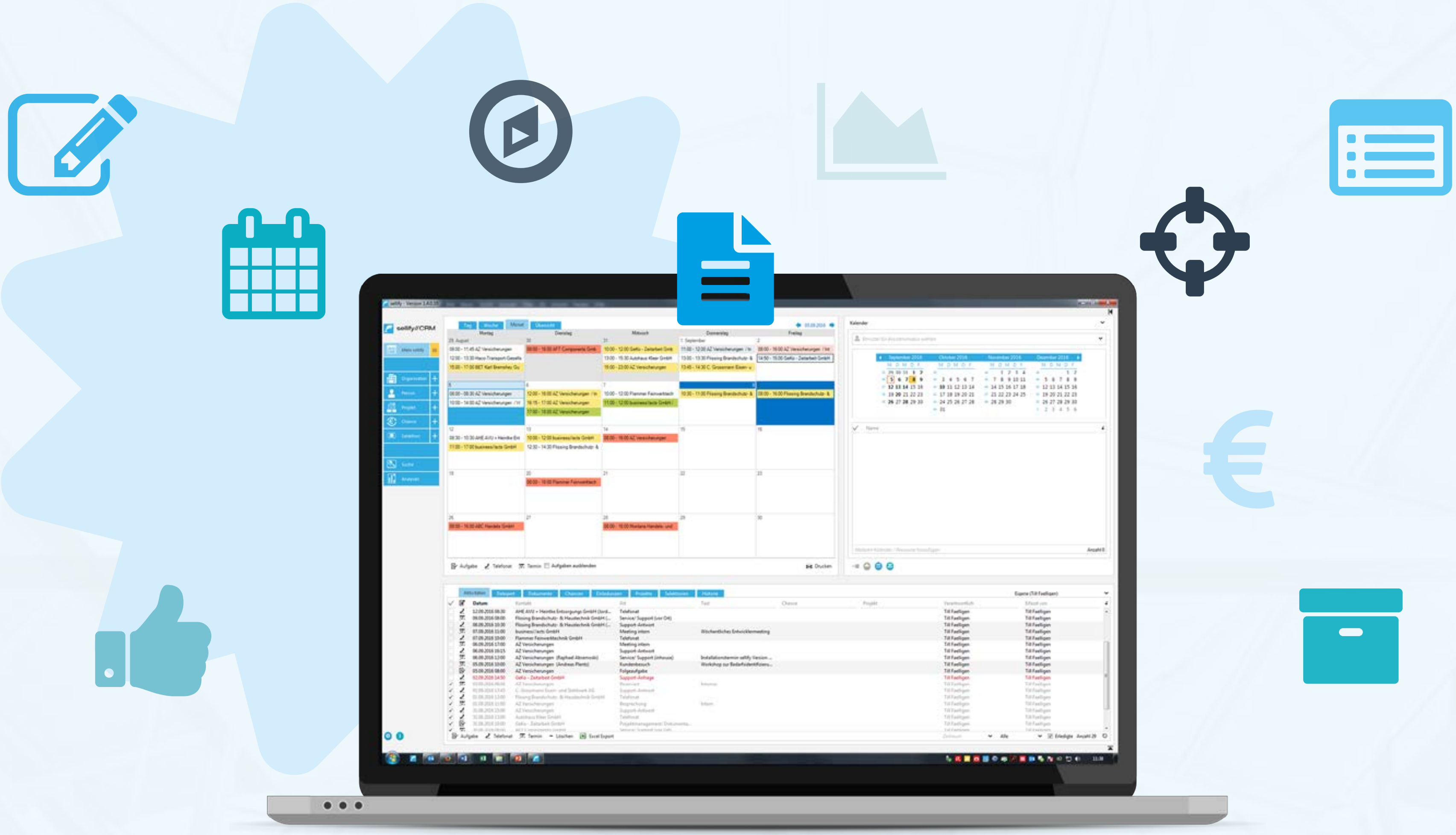
Changelog – What‘s new?

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



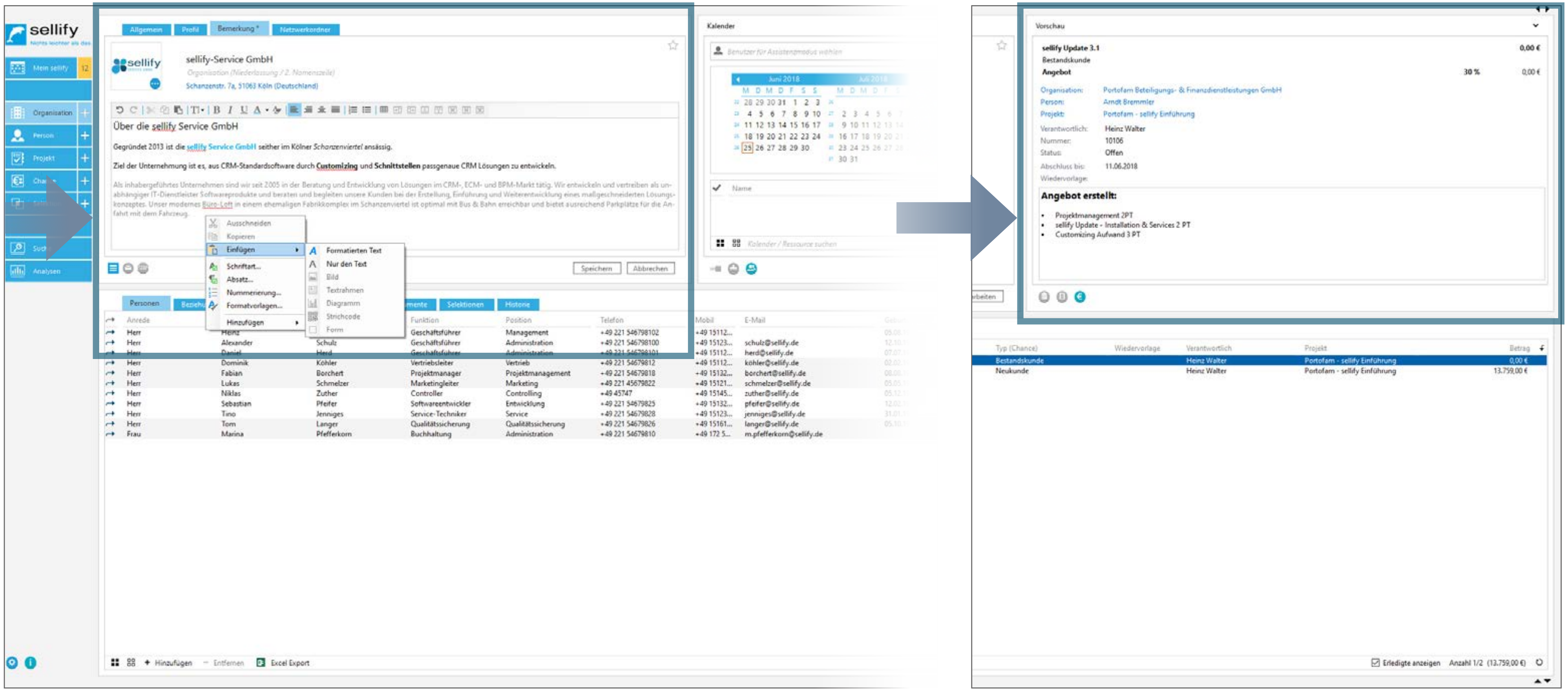
Contents

3.1 bis 3.6

New features & improvements

General

Text boxes RichText with formatting

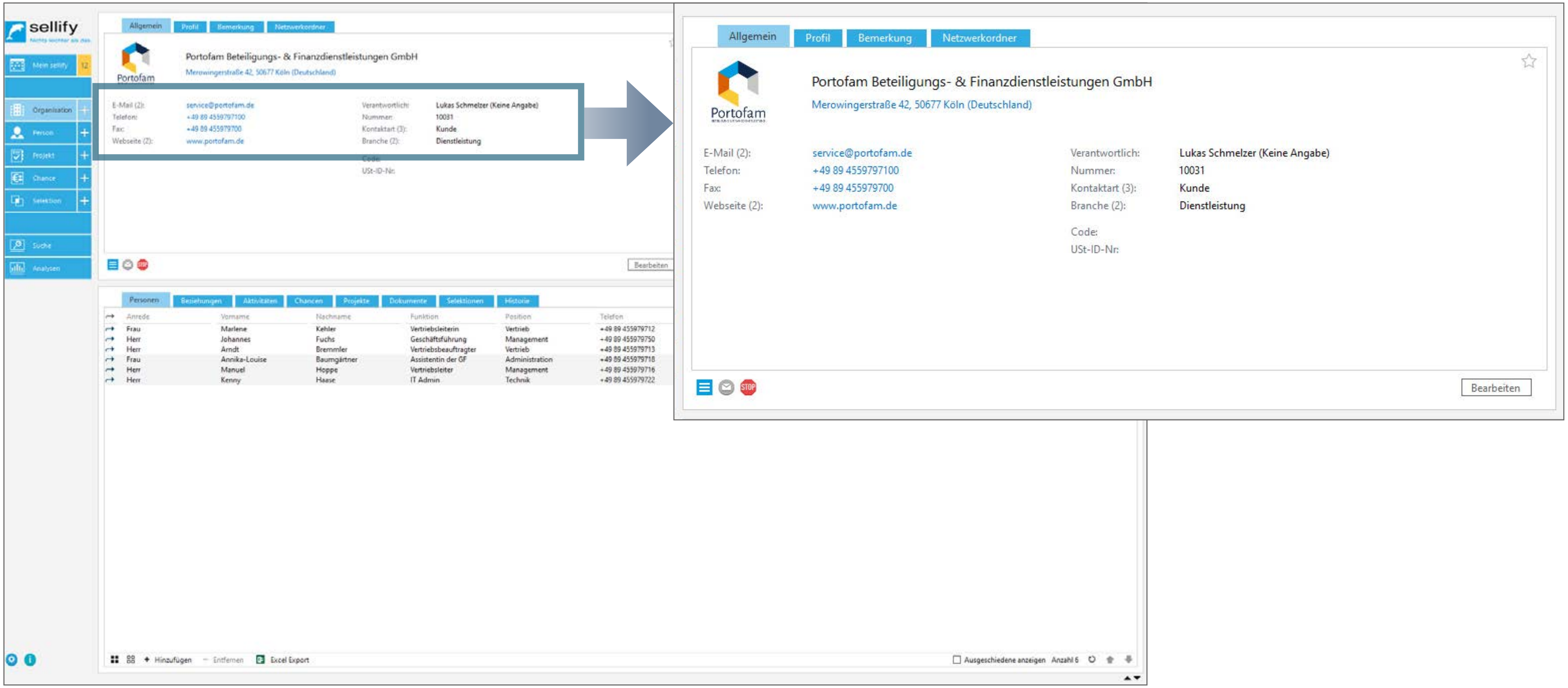


All text boxes (descriptions and remarks) in sellify have been enhanced with RichText formatting for version 3.1.

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

General

Adjustment of the continuity of labels with multiple selection

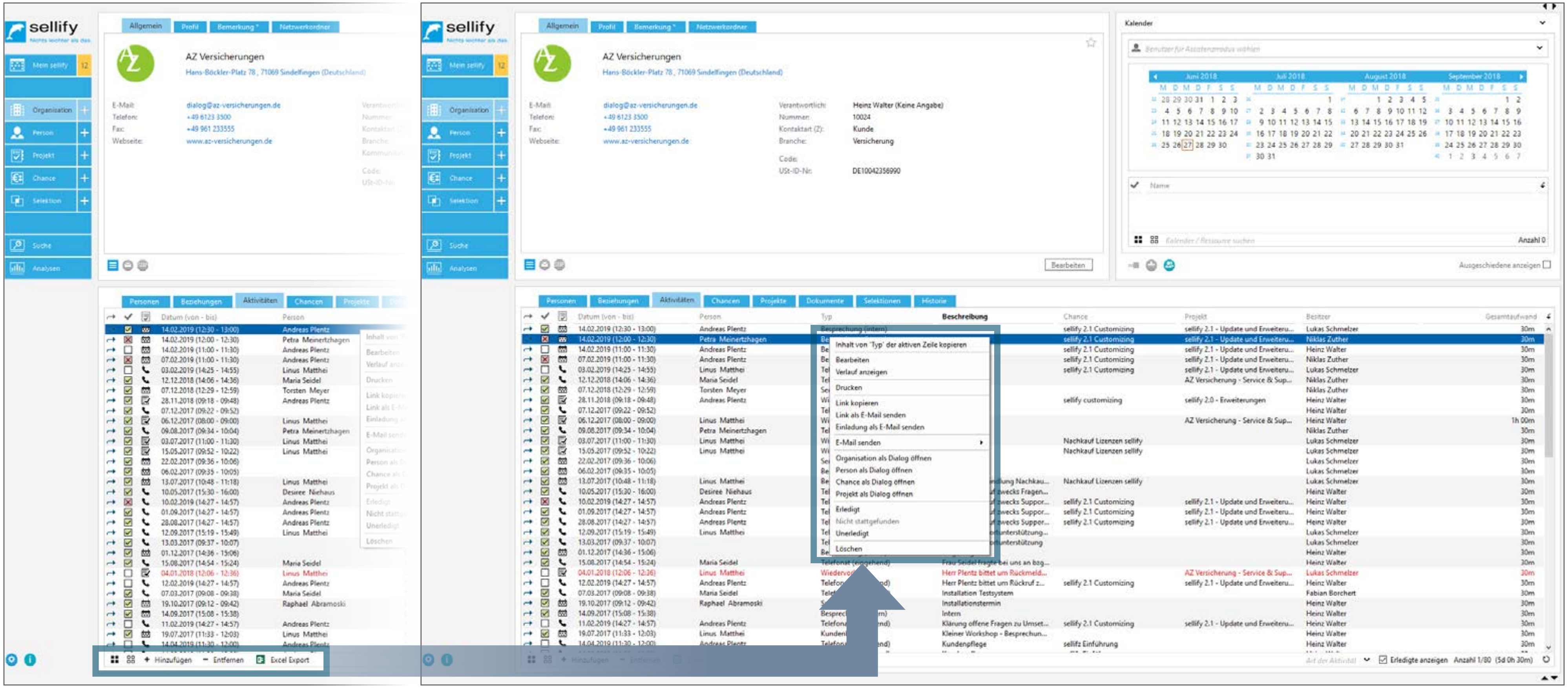


The labels for fields that can hold multiple data (e.g. phone, email, contact type, responsible) have been extended for version sellify 3.3 by the number of values in brackets.

The tooltips of the data fields list all stored contents.

General

Adjustment of the 'Actions' button

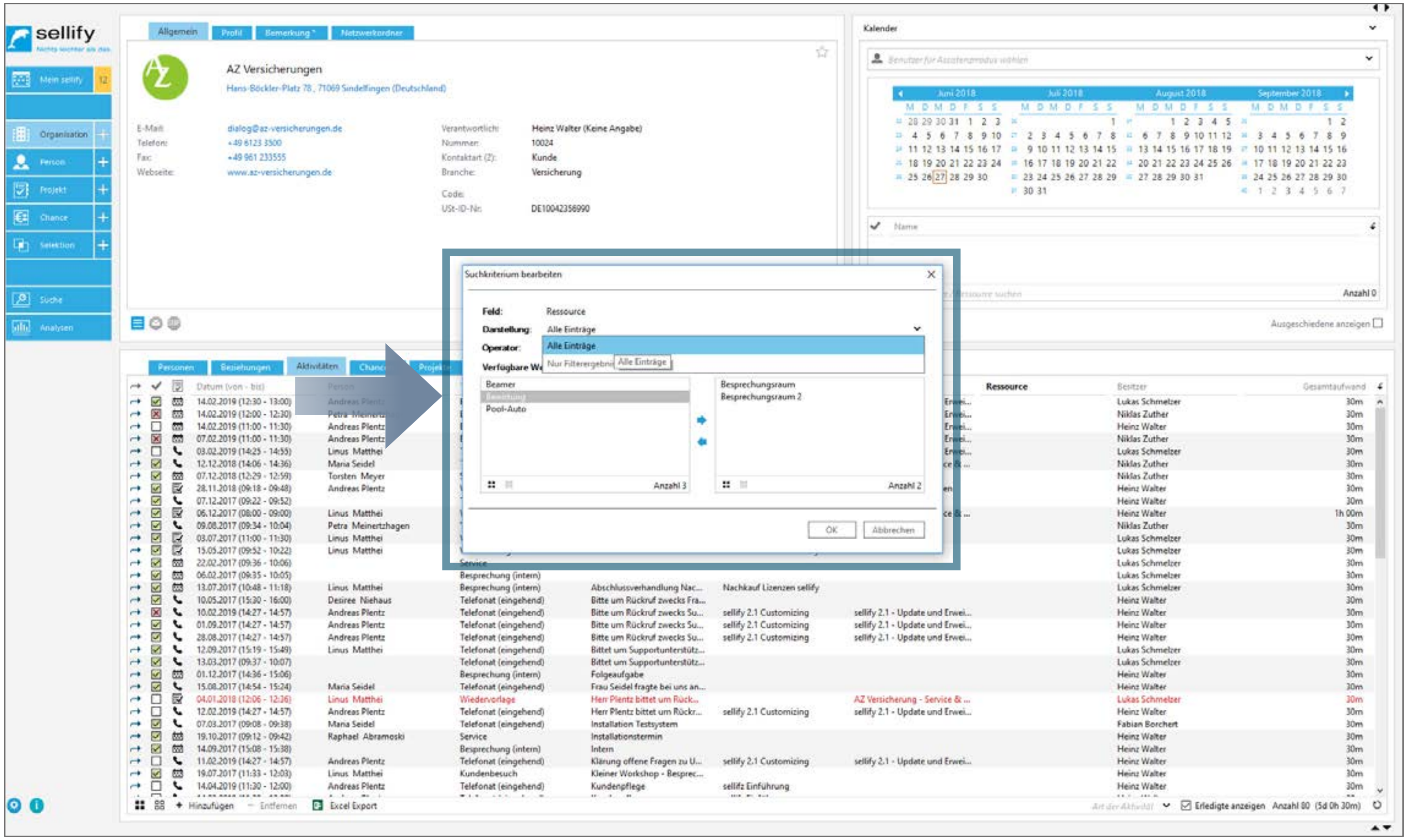


As of sellify 3.3, the "Actions" buttons have been removed from the standard archives.

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

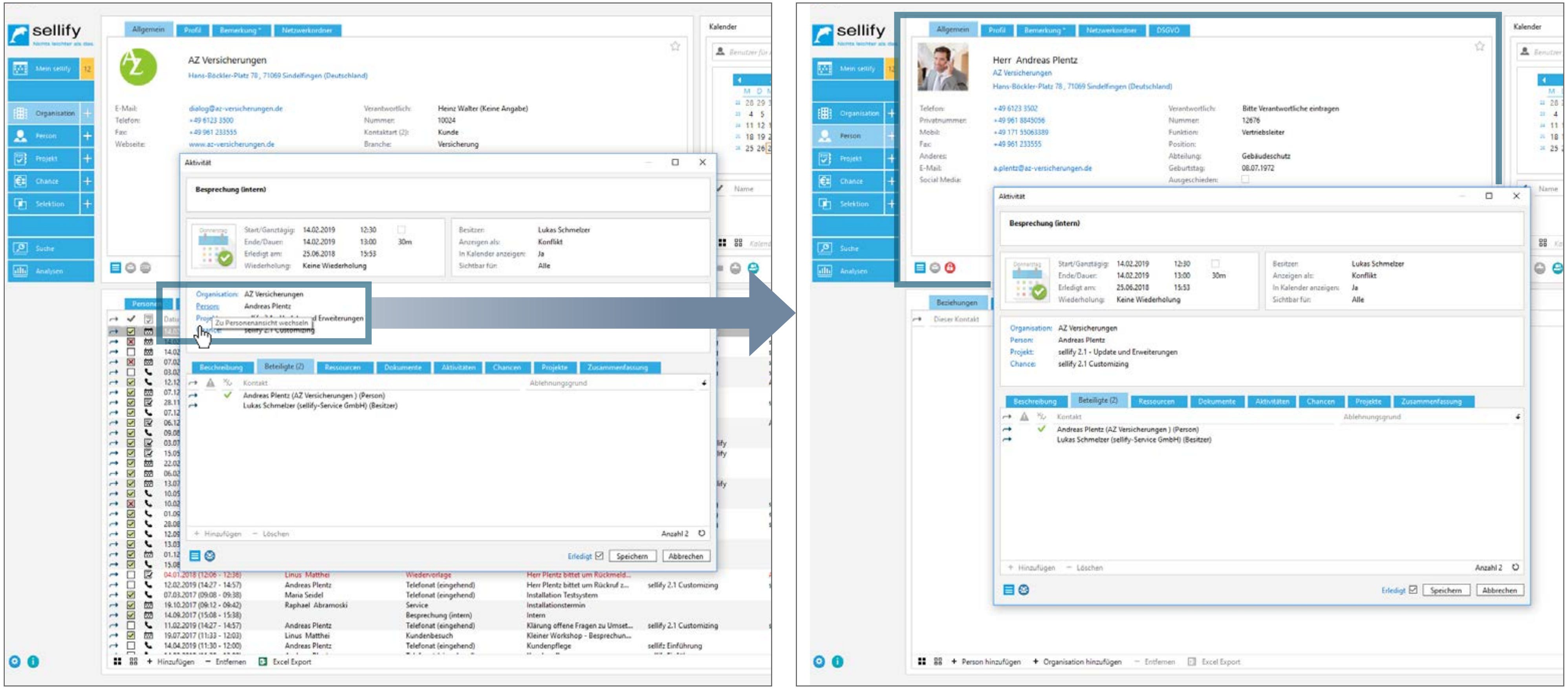


The control of column contents in archive views has been optimized for sellify 3.1:

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

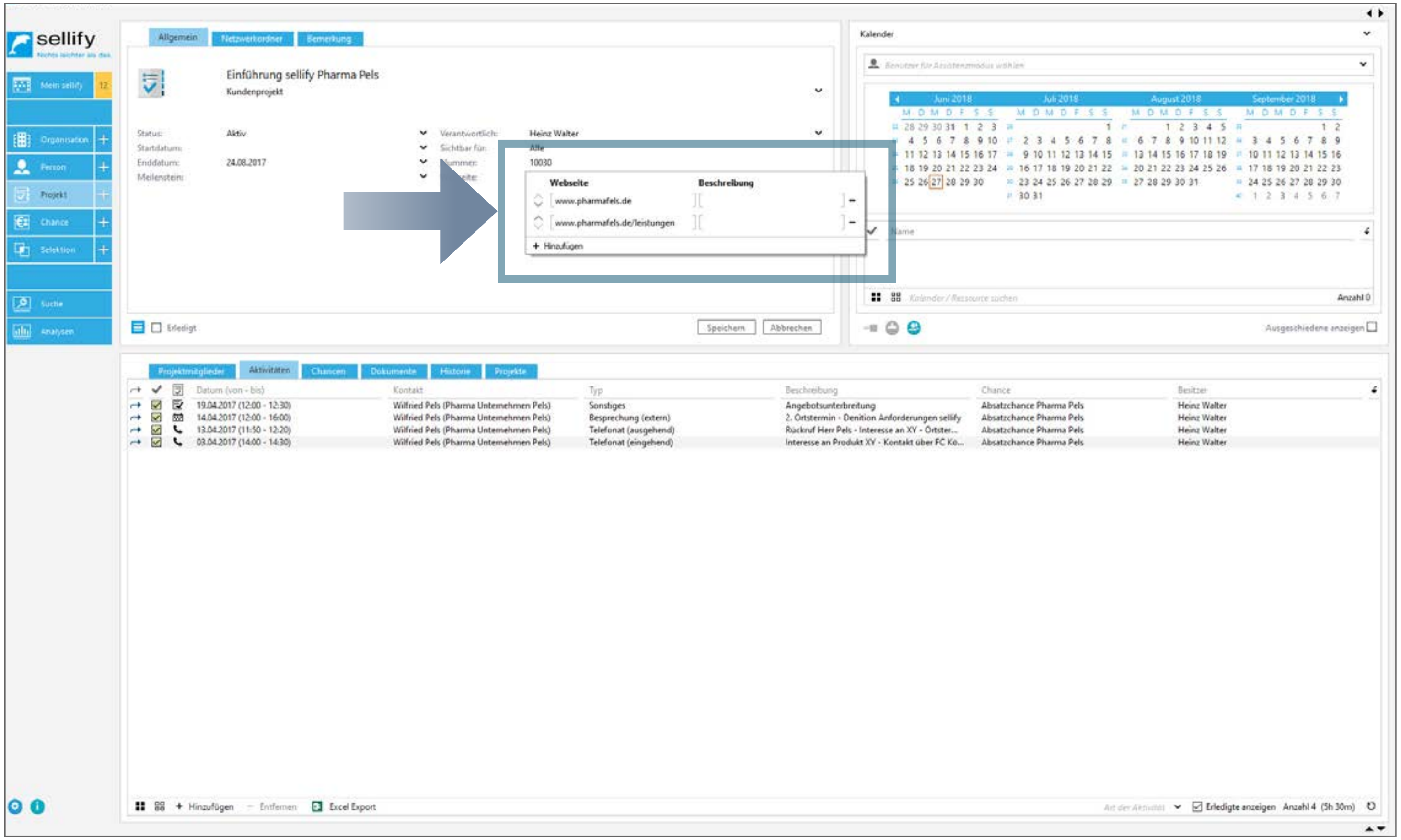
Hyperlinks in edit mode



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

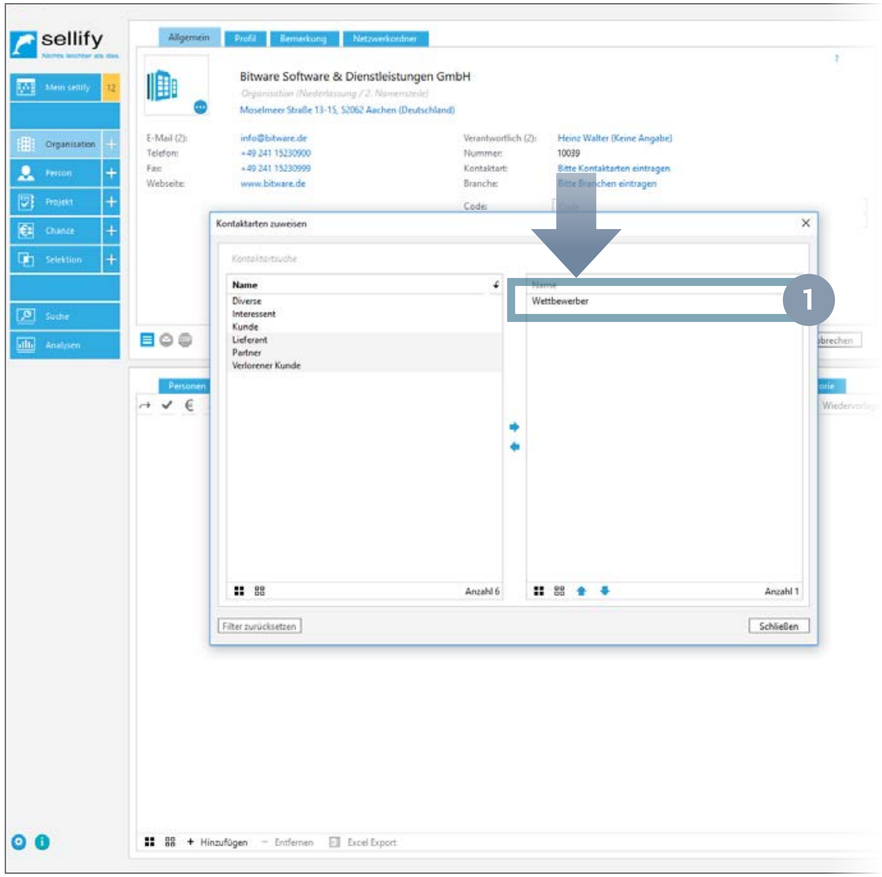


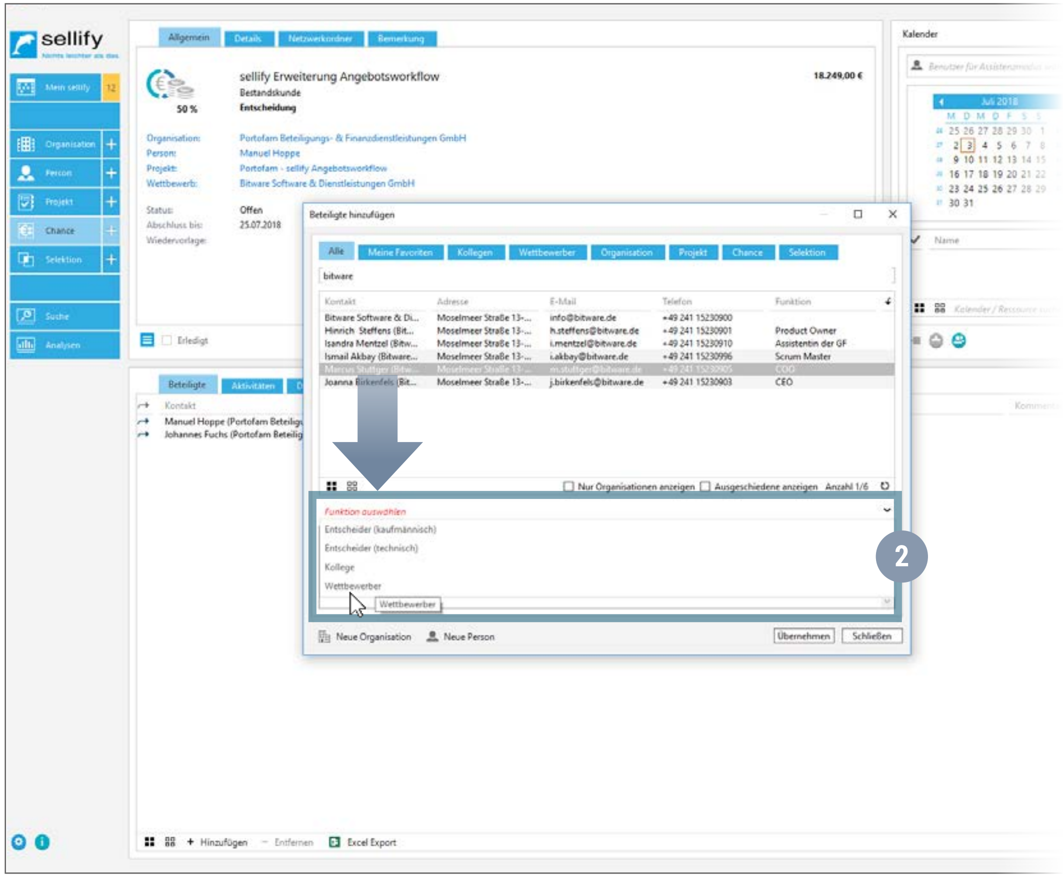
Projects have been optimized for sellify 3.1.

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



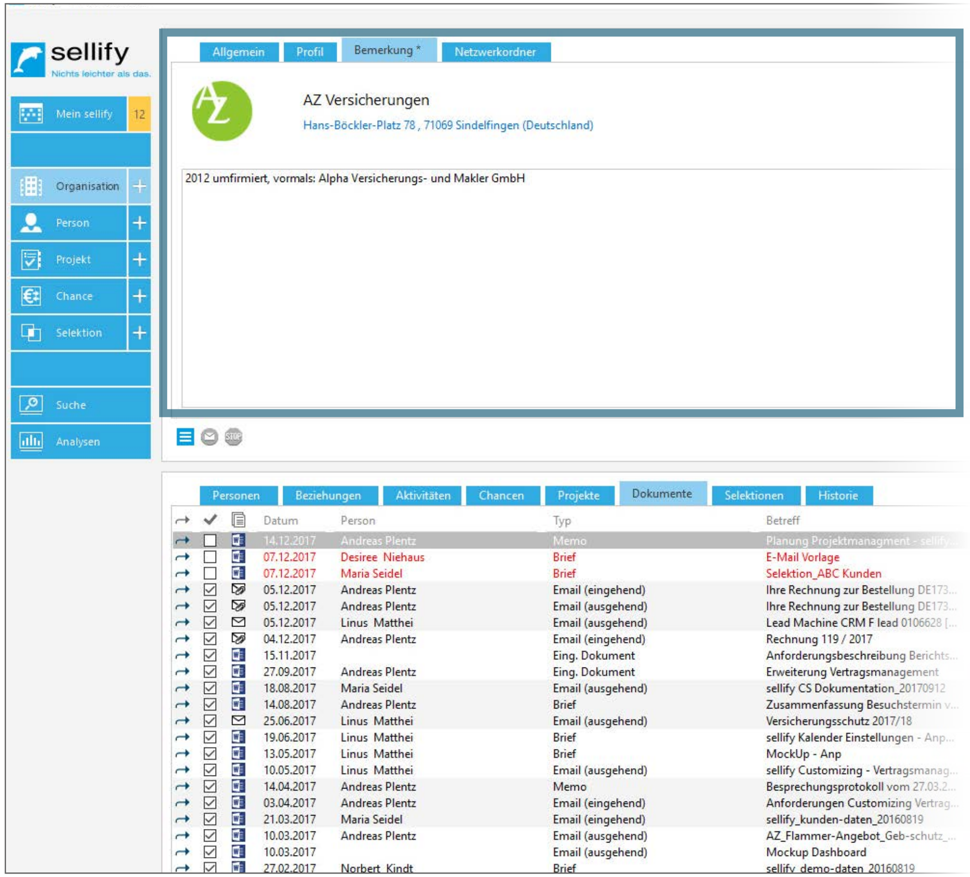


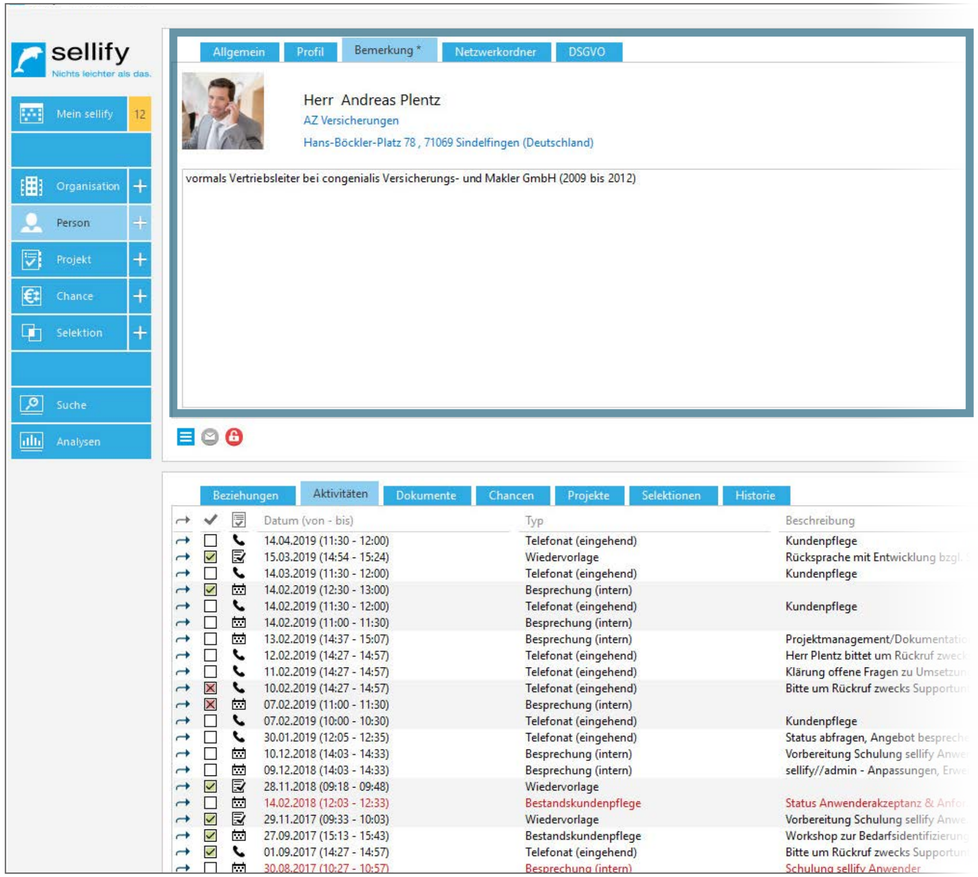
Version sellify 3.3 allows you to use 'Competitor' consistently via the contact type for organizations: You no longer mark a competitor (organization) via the checkbox, but via the entry 'Competitor' under contact type. (1)

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



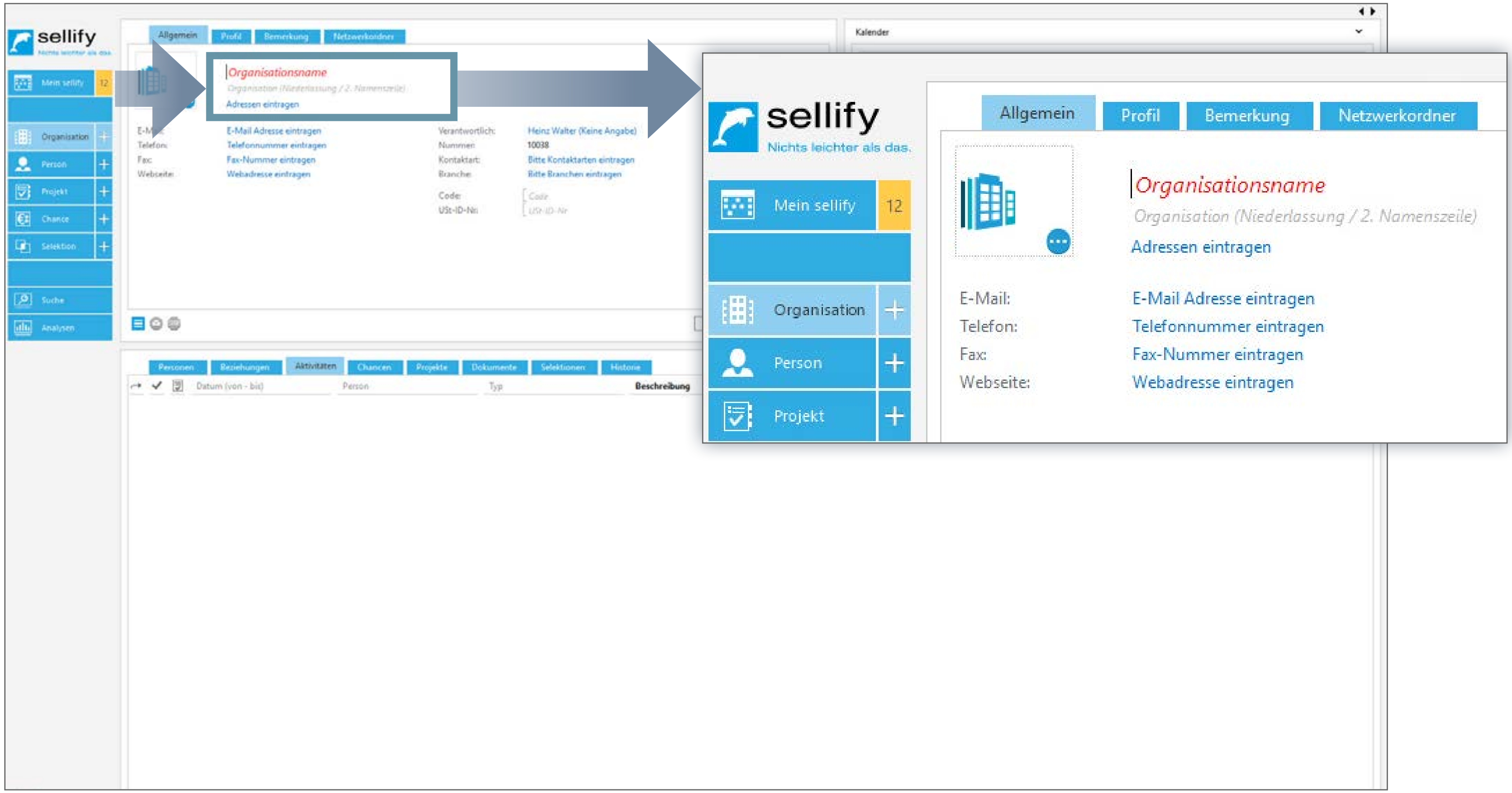


All map views have a separate 'Remark' tab with the release sellify 3.3. The remark fields in the 'General' tab in the Project, Opportunity and Selection cards have therefore been removed.

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

Organizations, people, projects, opportunities, selections

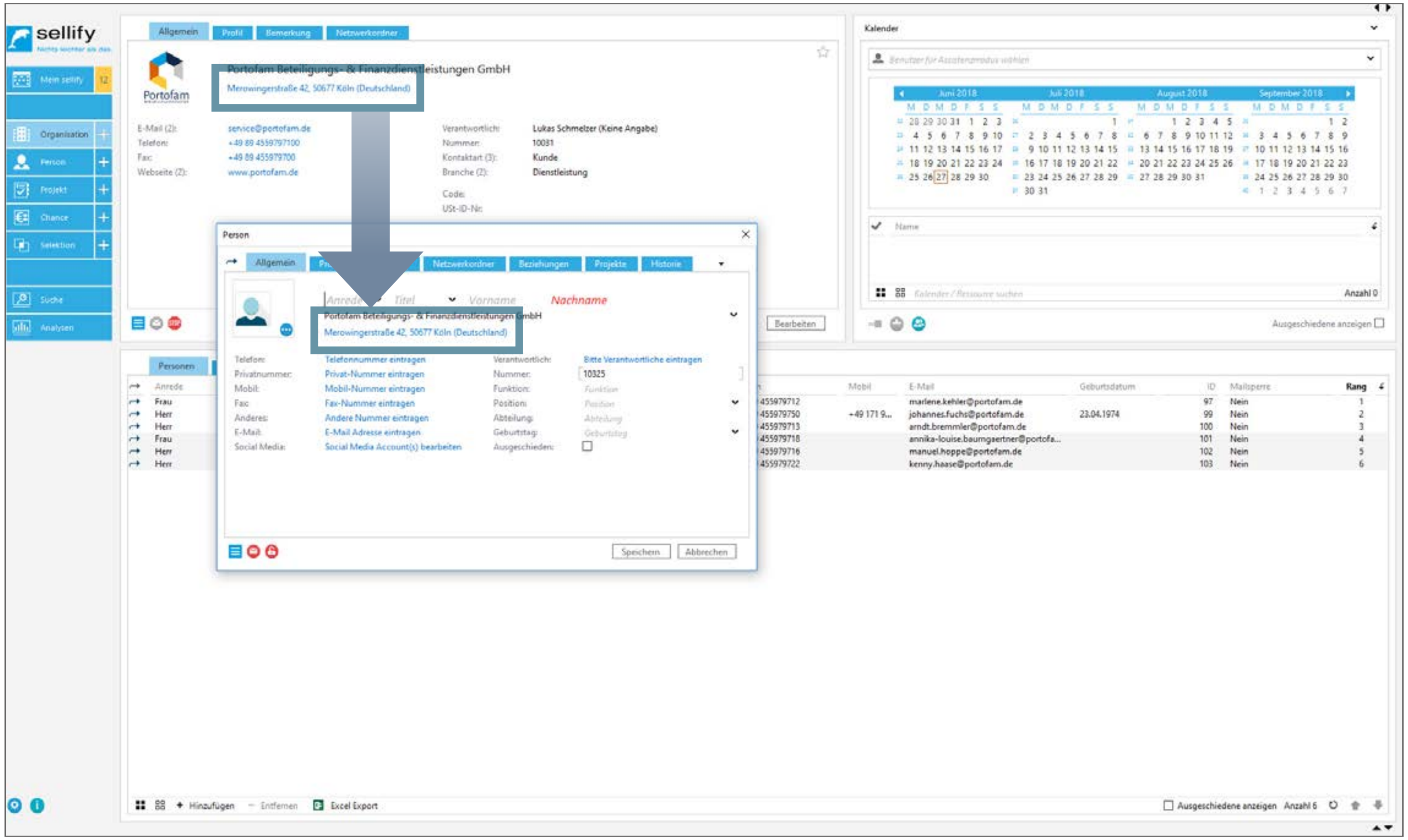
Field order for new records



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



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

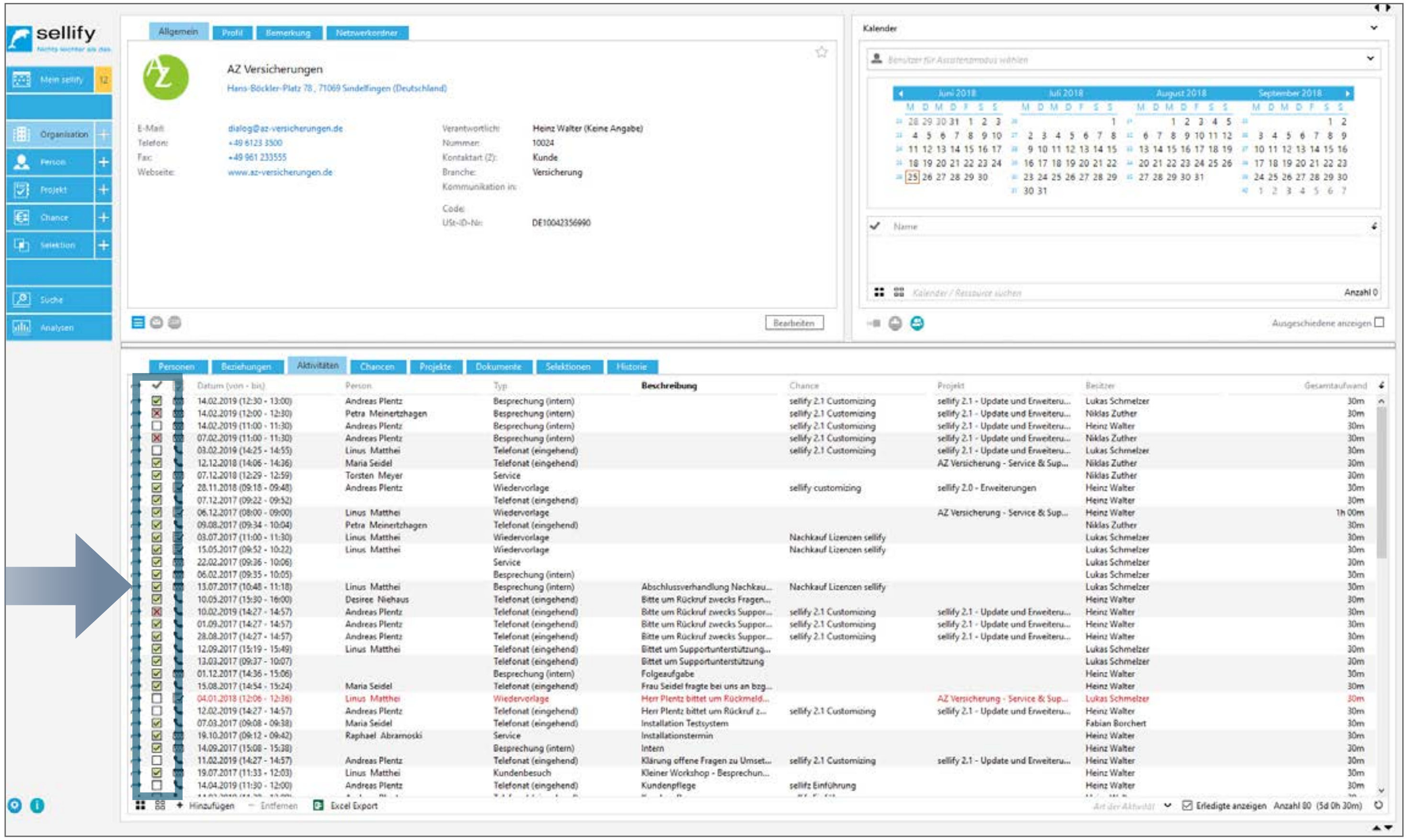
Only if you create the person without an organization, the country will be selected which was stored as default value in sellify//admin.

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



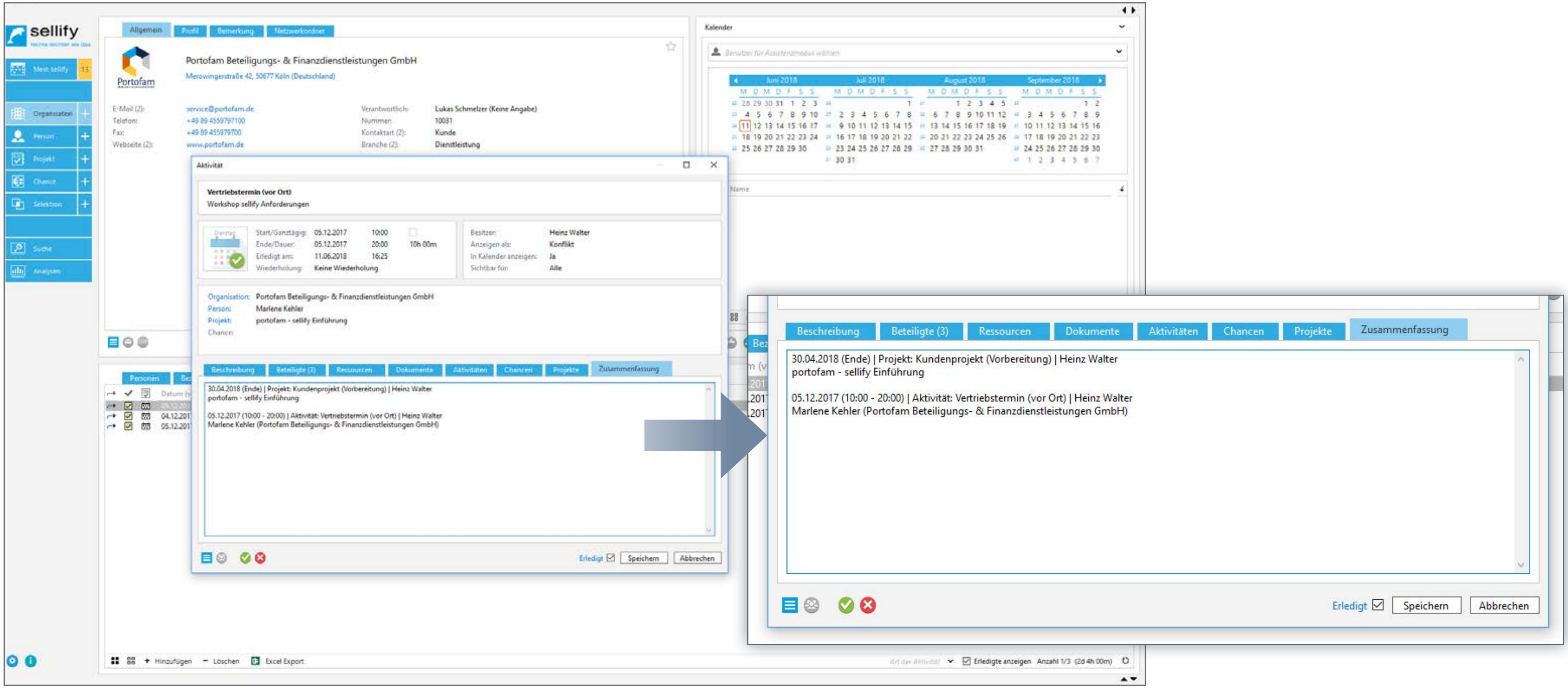
For sellify 3.1 and 3.3 respectively, appointments and phone calls have been supplemented by an additional status:

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

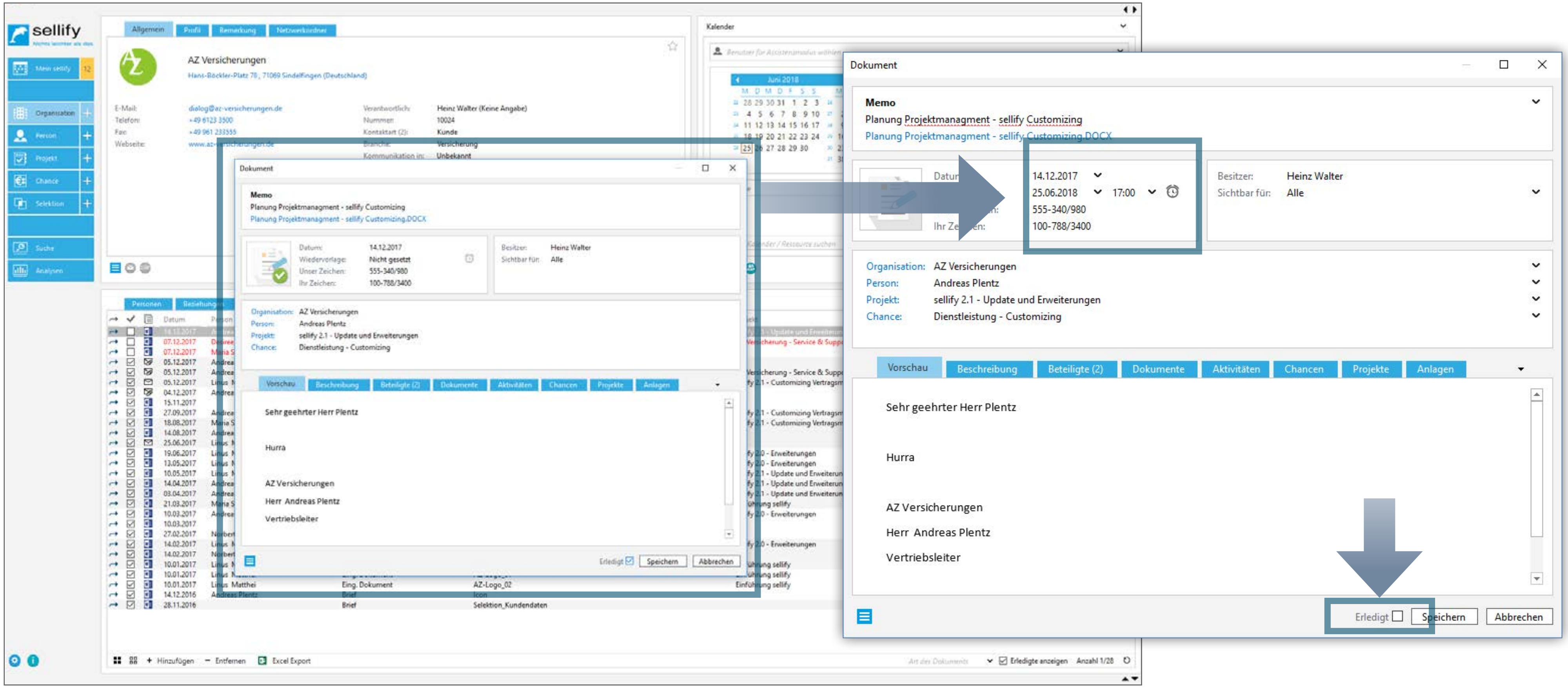


In the dialogs for activities and documents, a new "Summary" tab is available as of sellify 3.2.

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

Activities & Documents

Reminders for documents

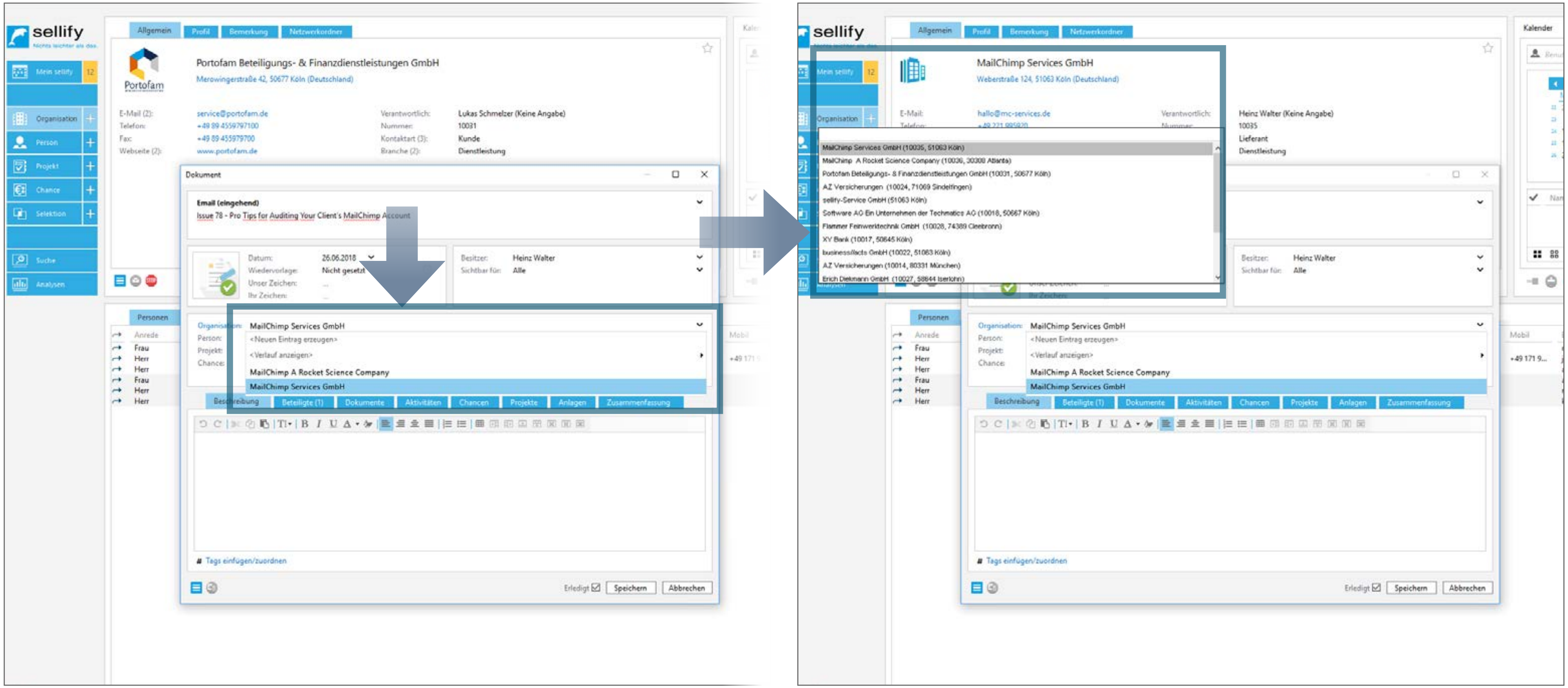


Starting with sellify 3.3, you can also activate the reminder function directly for "documents marked as done".

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

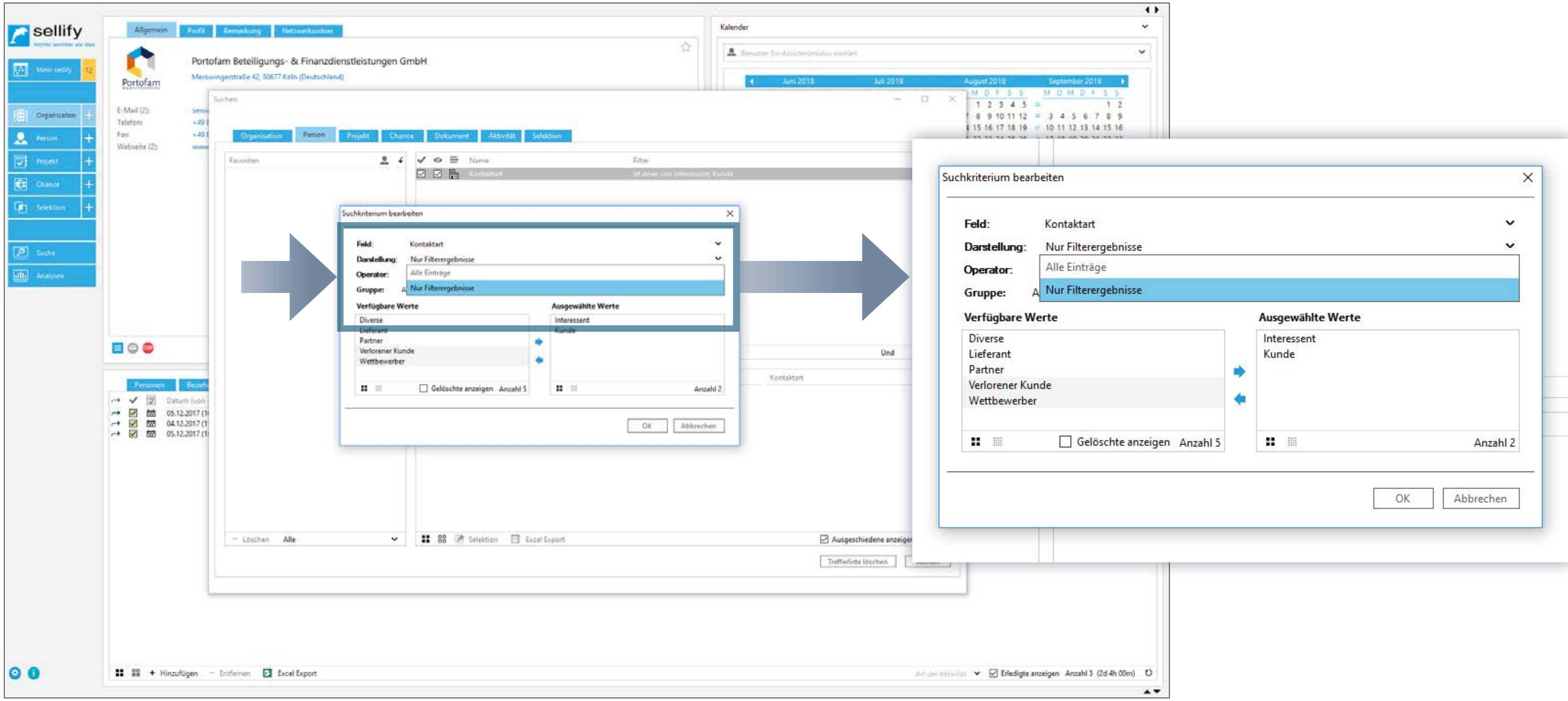
E-mail archiving - toggle function for contact selection



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



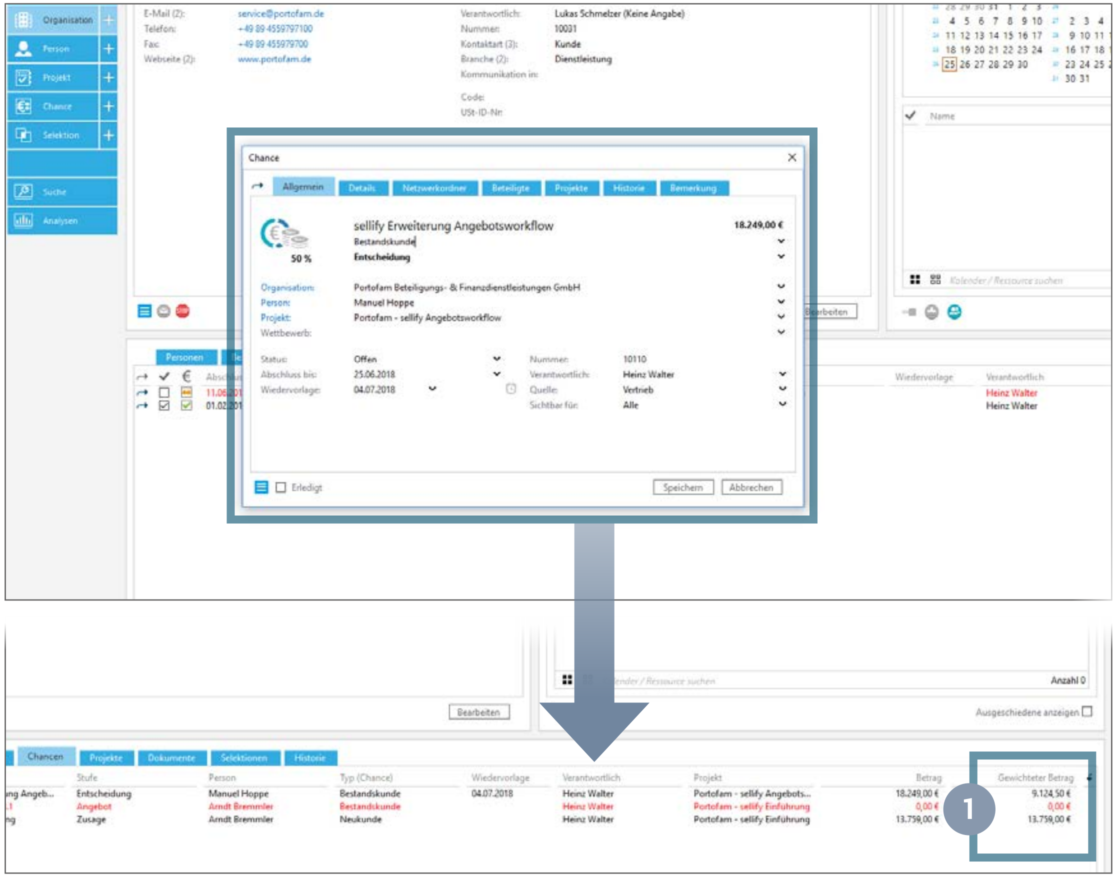
Bei einer Spalte mit einer Wertauflistung (z. B. Organisation - Kontaktart) können Sie ab sellify 3.1 bestimmen, ob bei einem aktivierten Spaltenfilter alle Einträge gelistet werden oder nur die Werte aus dem Spaltenfilter.

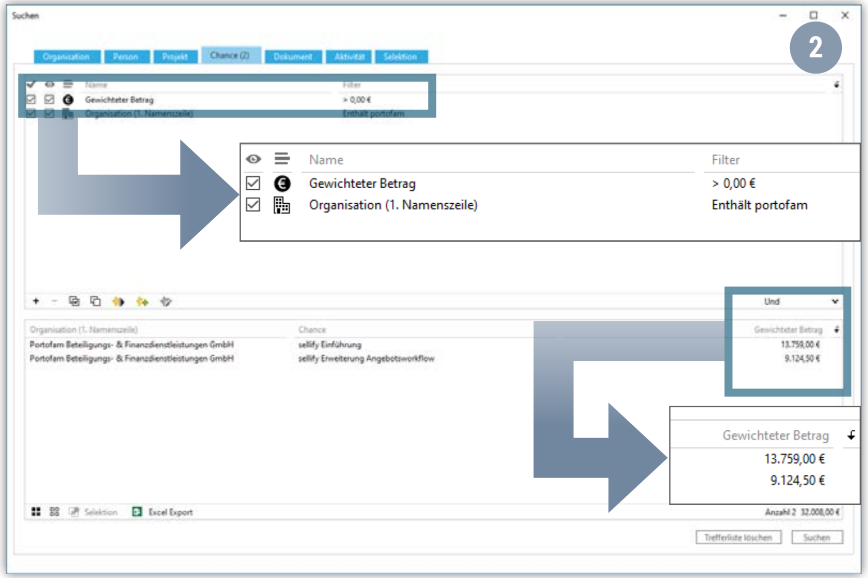
Klicken Sie hierzu im Dialog zur Erstellung/Bearbeitung des Suchkriteriums auf das Dropdownfeld ‚**Darstellung**' und wählen Sie ‚Alle Einträge' oder ‚Nur Filterergebnisse'.(1)

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



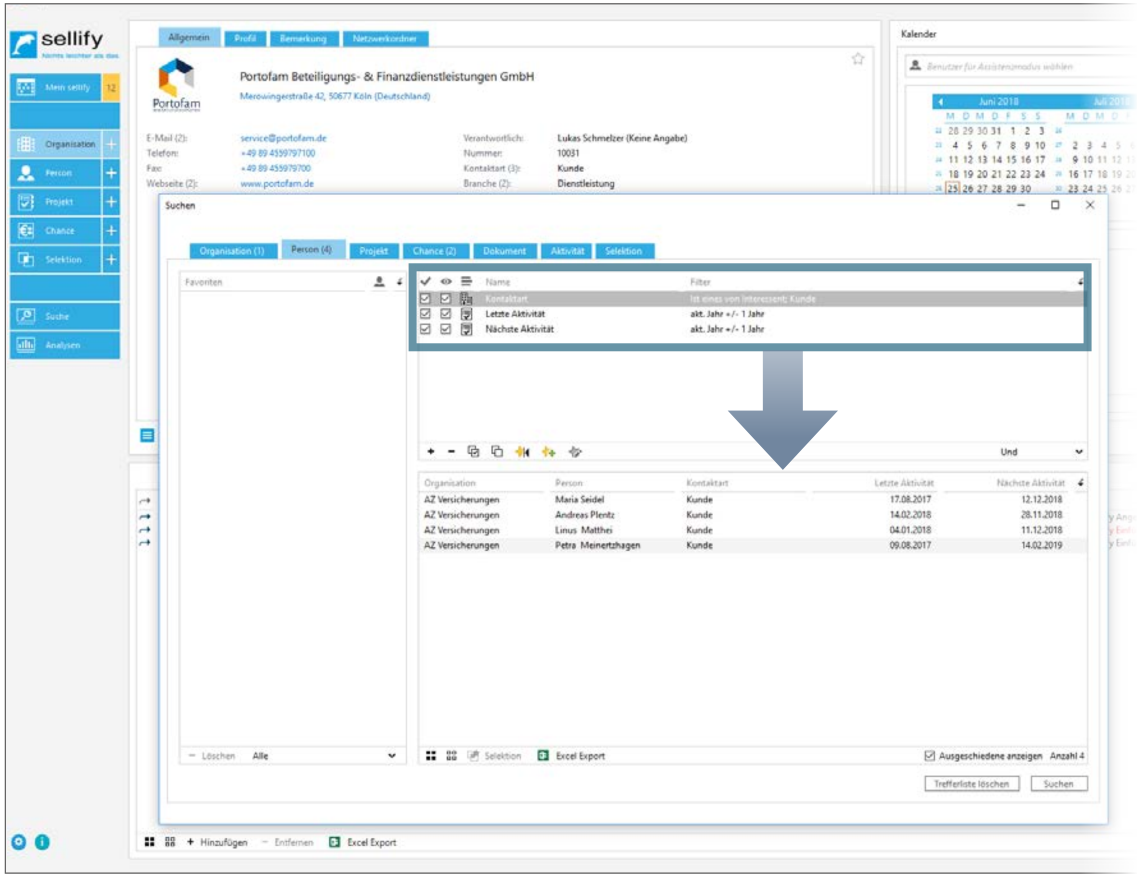


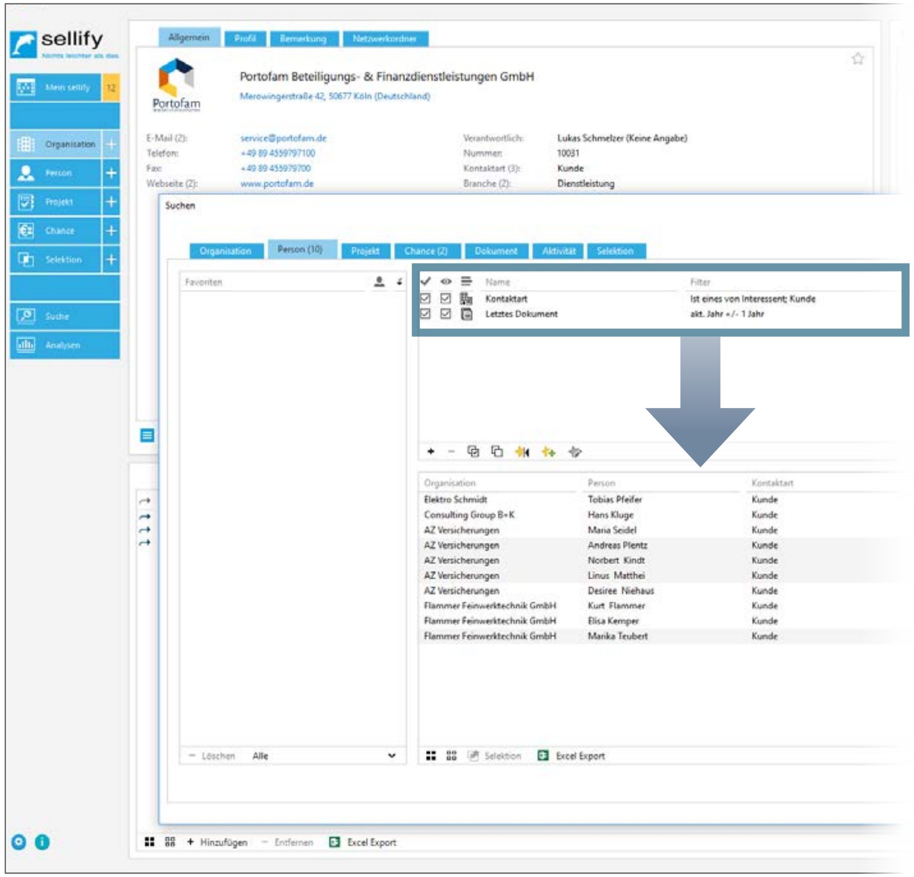
Für Chancen gibt es ab sellify 3.2 eine neue Spalte in den Archivansichten (1) sowie ein neues DKS-Suchkriterium ‚Gewichteter Betrag' (2). Hier wird Ihnen jeweils der Betrag der Chance multipliziert mit dem %-Teil der aktuellen Stufe ausgegeben.

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





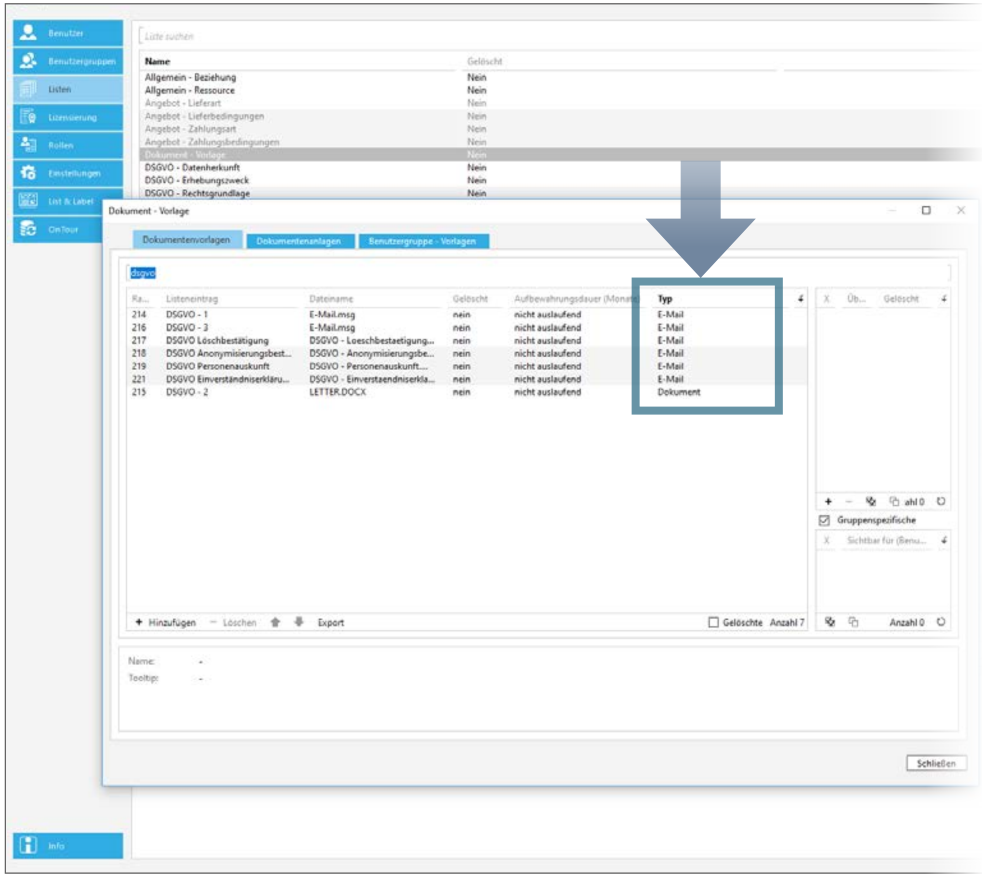
Außerdem wurde die dynamische Komfortsuche wie folgt erweitert:

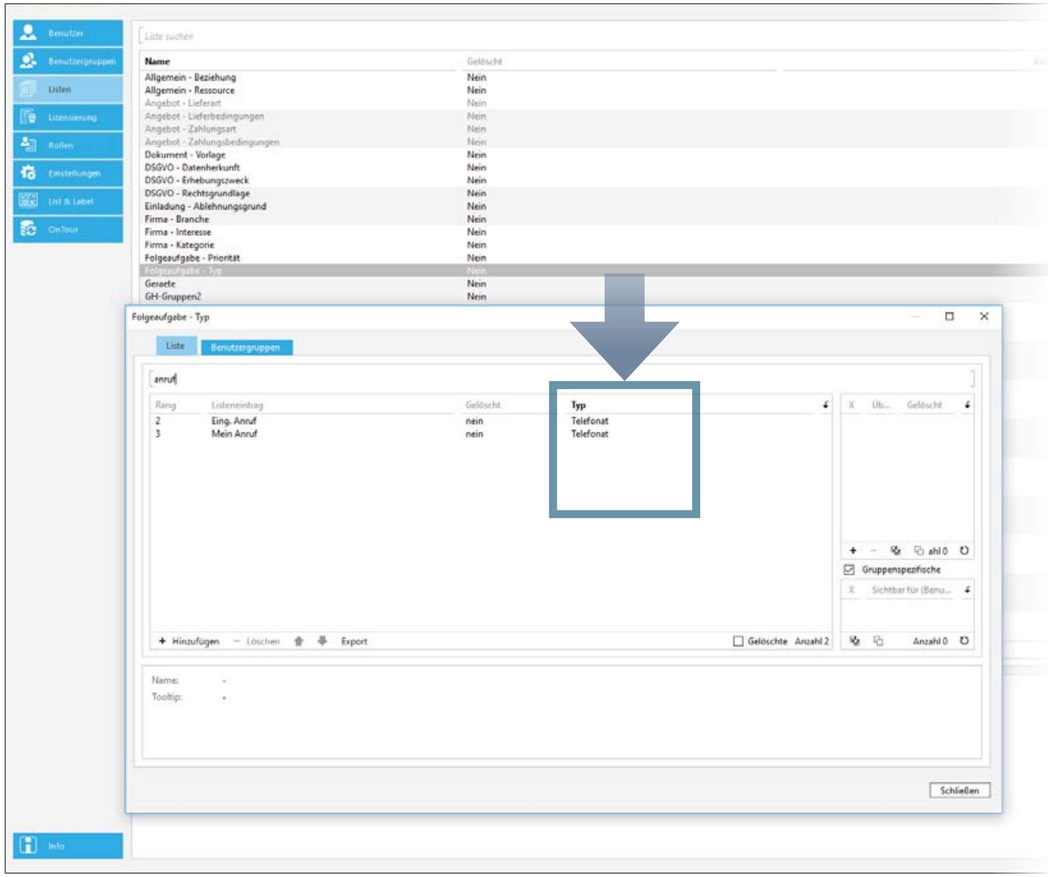
Das Kriterium ‚Aktivität - Letzte Aktivität‘ wurde angepasst. Hier wird Ihnen nun die älteste Aktivität in der Vergangenheit angezeigt und nicht mehr die älteste Aktivität, die in der Zukunft liegen könnte. Als neue Suchkriterien stehen Ihnen folgende zur Verfügung: ‚Aktivität - Nächste Aktivität‘ und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

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

sellify//admin

'Type' column for document templates and activities





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.