

## Changelog // sellify Release 3.14

New features, improvements and bug fixes





# sellify Release 3.14

## New features & improvements

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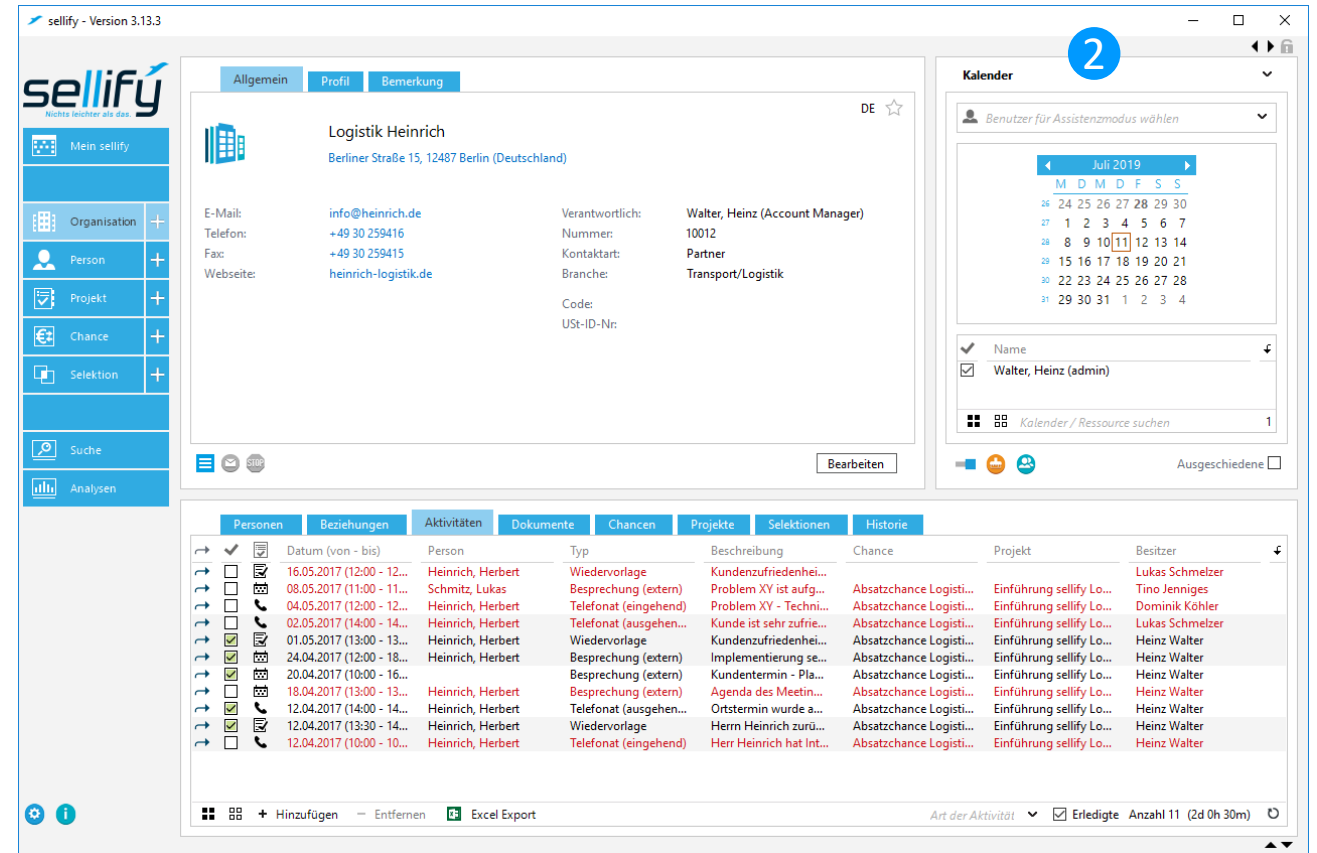
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# 1. General

## 1.1 Acceleration of the start time of sellify



Through continuous optimization, the startup time of sellify could be accelerated by about 20%.

# 1. General

## 1.2 Hyperlinks in RTF-Boxes

The image displays two side-by-side screenshots of a software interface, likely a project management or communication tool, showing the process of inserting and editing a hyperlink in a text field. The interface is titled 'Aktivität' and shows details for a meeting ('Besprechung') on Friday, May 17, 2019, at 14:00. The meeting is organized by 'dolphin campaigns' and involves 'Tom Marks'. The text field contains a mailing announcement: 'Mailing "Mit sellify einen kühlen Kopf bewahren":' followed by a bulleted list: 'Text- und Gestaltungsvorschläge der Agentur screenen und besprechen', 'Aktion terminieren', and 'sellify-Homepage'. The 'Hyperlink' field in the text is 'www.sellify.de'. The 'Hyperlink Eigenschaften' dialog box is open, showing 'Anzeige' (Display) and 'Hyperlink' (Link) fields. In the left screenshot, the 'Anzeige' field is empty and the 'Hyperlink' field contains 'Hyperlink'. In the right screenshot, the 'Anzeige' field contains 'sellify-Homepage' and the 'Hyperlink' field contains 'www.sellify.de'. Blue circles 1-4 highlight the insertion icon, the dialog box, the dialog box, and the hyperlink in the text field respectively.

Hyperlinks can now be inserted and executed in all text input fields that allow formatted characters. Editing the link is supported by a dialog where display text and link can be adjusted.



# 1. General

## 1.3 Follow function in the search and the Minicard

The screenshot displays a user interface with a profile card on the left and a list of opportunities on the right. The profile card for Herr Linus Matthei includes contact information and job details. The list of opportunities, titled 'Alle Chancen 07.2019 (Chancen)', has columns for selection status, date, title, contact, and amount. A dropdown menu is open at the bottom, showing options for 'Chance', 'Organisation', 'Person', and 'Projekt', with 'Person' selected.

Selektionsmitglieder	Alle Chancen 07.2019 (Chancen)
	☑ € Datum Titel Kontakt Betrag
	☑ 16.11.2018 2 Tage Workshop Matthei, Linus (AZ Versicherun... 2.150,00 €
	☐ 25.07.2018 sellify Erweiterung Angebots... Hoppe, Manuel (Portofam Bete... 18.249,00 €
	☐ 11.06.2018 sellify Update 3.1 Bremmler, Arndt (Portofam Bet... 0,00 €
	☑ 01.02.2018 sellify Einführung Bremmler, Arndt (Portofam Bet... 13.759,00 €
	☑ 17.12.2017 Lizenzverkauf 1309 Matthei, Linus (AZ Handels AG) 666,00 €
	☑ 16.12.2017 Dienstleistung Kindt, Norbert (AZ Handels AG) 1.075,00 €
	☑ 12.12.2017 Anwender Training Matthei, Linus (AZ Handels AG) 1.075,00 €
	☑ 29.11.2017 Dokumentation Leitfaden sell... dolfin campaigns 875,00 €
	☑ 16.11.2017 sellify 2.1 Customizing Plentz, Andreas (AZ Handels AG) 12.800,00 €
	☑ 08.11.2017 sellify customizing Matthei, Linus (AZ Handels AG) 4.300,00 €
	☑ 30.10.2017 Dienstleistung - Customizing Matthei, Linus (AZ Handels AG) 8.750,00 €
	☑ 26.10.2017 2 Tage Workshop Matthei, Linus (AZ Handels AG) 2.150,00 €
	☐ 04.05.2017 Absatzchance Versicherung A... sellify Service & Demo GmbH 15.000,00 €
	☐ 03.05.2017 Absatzchance Pharma Pels Pels, Wilfried (Pharma Unterne... 15.000,00 €
	☑ 21.04.2017 Absatzchance Reisebüro Büsch Büsch, Ralf (Reisebüro Büsch) 10.000,00 €
	☑ 21.04.2017 Absatzchance Maschinenbau... Eilers, Jörg (Maschinenbau Eilers) 30.000,00 €
	☐ 21.04.2017 Absatzchance Voigt und Kolle... Voigt, Manuel (Sachverständig... 34.000,00 €

If the "Follow function" is activated, the selected data set is displayed in the main map view and updated when a row is changed. This makes navigation through result sets easier and more comfortable.

The function is available for search result lists as well as search favorites and selection members in the Minicard view. For selection members (as of sellify version 3.14 also for search results), depending on the selection type, it is also possible to specify which linked data set is to be displayed in the main card view.

# 1. General

## 1.4 Opening table entries with the keyboard

The screenshot displays a CRM application interface. The main window shows contact details for 'dolphin campaigns' (Hauptstr. 7a, 51063 Köln (Deutschland)). The contact information includes E-Mail (info@dolphin-campaigns.net), Telefon (+49 221 995920), and Webseite (www.dolphin-campaigns.net). The contact is managed by Daniela Maria Krüger.

An activity window titled 'Aktivität' is open, showing a meeting entry 'Besprechung (intern)' on Friday, 28.06.2019, from 10:00 to 10:30. The meeting is completed (Erledigt am: 11.07.2019) and has no repetition. The meeting details include the owner (Krüger, Daniela Maria) and visibility settings (Sichtbar für alle).

The bottom-left pane shows a table of activities:

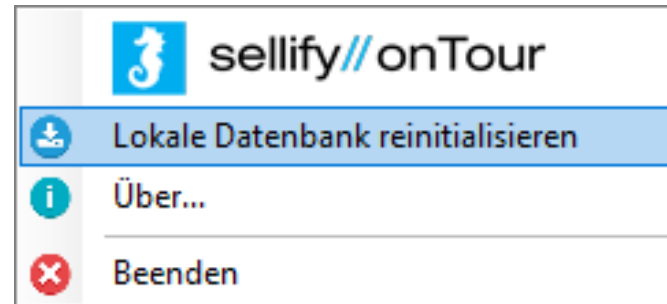
Datum (von - bis)	Person
28.06.2019 (10:00 - 10:30)	Mann, Sebastian
13.06.2019 (09:15 - 10:45)	
17.05.2019 (14:00 - 16:00)	Marks, Tom

The keyboard diagram highlights the Enter key (labeled '2') and the first row of the activity table (labeled '1'). The activity window title 'Besprechung (intern)' is labeled '3'.

Executing the Enter key now allows to call a dialog and makes the operation of sellify via keyboard even more comfortable.



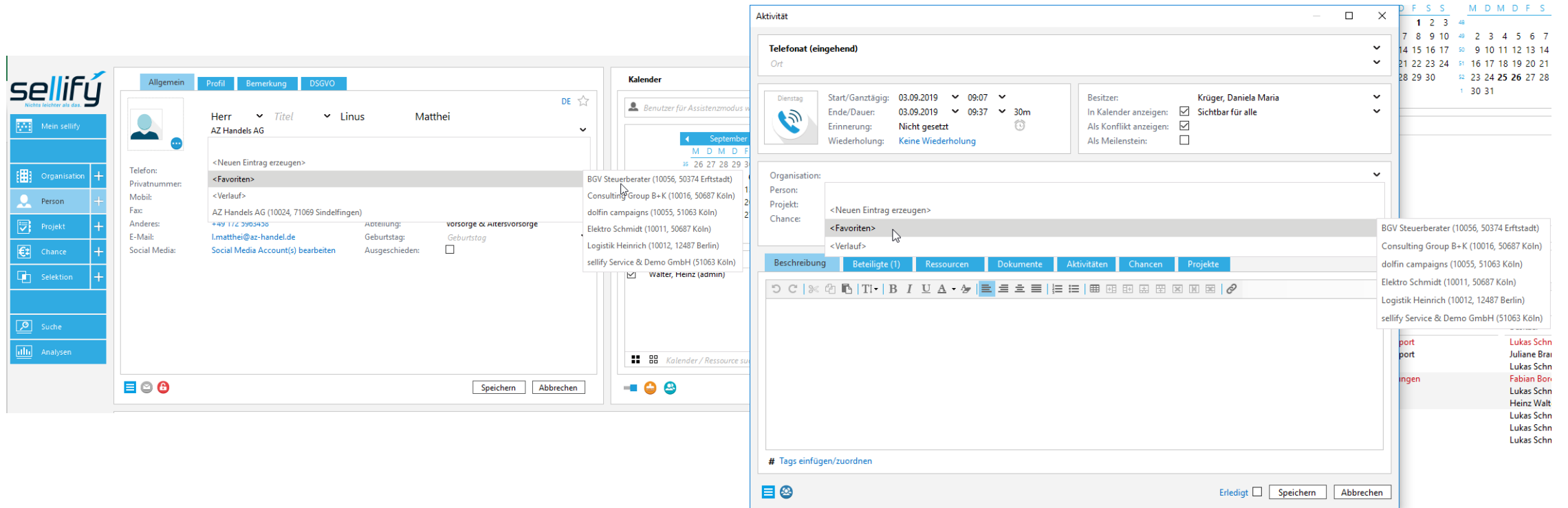
1. General
- 1.5 Adaptation of the database exchange with sellify//onTour



In order to minimize the risk of data loss by obtaining a new on//tour database, the on/tour user's data is now automatically transferred to the server before the database is replaced.

# 1. General

## 1.6 Favorite entries in selection lists



Organizations and persons marked as "Favorite" are now directly available in selection lists via an additional entry "<Favorites>".



## 2. My sellify

### 2.1 Display locations from activities

The screenshot displays the My sellify interface. On the left, a calendar view for Monday, July 15, 2019, shows a time slot from 12:25 to 16:00. A blue circle with the number '2' highlights this slot, which contains the text: "Besprechung (intern) / Marketingaktion 05.2019", "Schanzenstr. 7a, 51063 Köln (sellify Service & Demo GmbH)", "dolfin campaigns", and "12:25-16:00".

On the right, a detailed activity window is open, titled "Aktivität". A blue circle with the number '1' highlights the title "Besprechung (intern)". The window shows the following details:

- Location:** Schanzenstr. 7a, 51063 Köln (sellify Service & Demo GmbH)
- Start/End:** 15.07.2019 12:25 - 15.07.2019 16:00 (Duration: 3h 35m)
- Reminder:** Nicht gesetzt
- Repetition:** Keine Wiederholung
- Owner:** Krüger, Daniela Maria
- Calendar Settings:** In Kalender anzeigen:  Sichtbar für alle:  Als Konflikt anzeigen:  Als Meilenstein:
- Organization:** dolfin campaigns
- Person:** (empty)
- Project:** Marketingaktion 05.2019
- Chance:** (empty)

Below the activity details, there is a section for "Beteiligte (1)" (Participants) with a sub-tab "Ablehnungsgrund" (Reason for refusal). It lists "Krüger, Daniela Maria (sellify Service & Demo GmbH) (Besitzer)" with a green checkmark. At the bottom right of the window, there are buttons for "Erledigt" (Completed), "Speichern" (Save), and "Abbrechen" (Cancel).

Due to multiple customer requests, a location is only displayed in the calendar view of sellify if an explicit location has been specified in the appointment. In addition to this change, it is now possible to define in `sellify//admin` per appointment type whether an activity is created with internal, external or without location information as default. Accordingly, the own address, the visit address of the customer or no address is specified in the appointment.

### 3. Organizations // People // Projects // Opportunities // Selections

#### 3.1 Switch from Open Street Maps to GoogleMaps

The screenshot shows a web browser window displaying a Google Maps interface. The address bar shows the URL: <https://www.google.com/maps/place/SchanzenstraÙe+7A,+51063+Köln/@50.9668354,7.0108744,17z/data=!3m1!1e3!1s0x47bf260274477feb:0xe7eb4505ee509239!6m2!3d50.9668354>. The search bar contains "Köln 51063 Schanzenstr. 7a".

On the left, a sidebar for "sellify Service & Demo GmbH" is visible. It includes contact information:
 

- E-Mail: [info@businessacts.de](mailto:info@businessacts.de)
- Telefon: +49 221 995920
- Fax: +49 221 9959229
- Webseite: [www.businessacts.de](http://www.businessacts.de)

 The address is listed as "Schanzenstr. 7a, 51063 Köln, Deutschland". A blue circle with the number "1" highlights the address field. Below the address, there is a "Besuchsadresse" and "Postadresse" section, both pointing to "Schanzenstr. 7a, 51063 Köln, Deutschland". Other details include "Walter, Heinz (Account Manager)", "Lieferant", "Dienstleistung", "Code", and "USt-ID-Nr.: DE99999999".

The map shows a street view of Schanzenstraße 7A in Köln, Germany. A red pin is placed on the map at this location, with a blue circle containing the number "2" next to it. The map also shows surrounding streets like Markgrafenerstraße and various businesses like "Netto Filiale", "Kulturbunker Köln-Mülheim eV", and "Studio Köln-Mülheim".

Below the map, there is a section titled "An diesem Ort" (At this location) which includes a photo of a building and details for "business//acts GmbH":
 

- 5.0 ★★★★★ (1)
- Softwareentwickler/-hersteller
- Schanzenstraße 7A
- Geöffnet bis 18:00

Stored addresses are now displayed in "GoogleMaps" when clicking on the address.



## 3. Organizations // People // Projects // Opportunities // Selections

## 3.2 Manual change of the "Expiration date in the person

The screenshot illustrates the process of manually changing the expiration date of a personal data record in a CRM system. The interface is divided into several sections:

- 1. Profile Overview:** Shows the person's name (Herr Tom Marks), organization (dolphin campaigns), and address (Mainstr. 18, 60306 Frankfurt (Deutschland)). It also displays the data source (Persönlicher Kontakt), legal basis (vorvertragliche Maßnahme), collection purpose (Dokumentation aktive Geschäftsbeziehung), and expiration date (29.02.2024).
- 2. Legal Basis Selection:** A dialog box titled 'Rechtsgrundlage zuweisen' allows users to select a legal basis from a list. The selected basis is 'vorvertragliche Maßnahme' with a retention period of 120 months.
- 3. Date Selection:** A date picker is used to manually set the expiration date. The calendar shows February 2024, with the 29th highlighted.
- 4. Confirmation:** The final profile view shows the updated expiration date (29.02.2024) and other details.

The expiration date of a personal data record, which is determined automatically by assigning a legal basis, can now be changed manually by users with the appropriate authorization.

### 3. Organizations // People // Projects // Opportunities // Selections

#### 3.3 Improved project status tracking


The screenshot shows the 'Bemerkung' (Remarks) tab for a project. The project name is 'dolphin campaigns - Einführungsprojekt sellify' with a sub-note 'sellify Einführung'. A status dropdown menu is open, showing three options: 'Geplant' (planned), 'Aktiv' (active), and 'Abgeschlossen' (completed). The current status is 'Geplant'. Below the status menu, there is a 'URL:' field and a 'Url eintragen' (enter URL) button. At the bottom of the form, there is a checkbox labeled 'Erledigt' (completed) and two buttons: 'Speichern' (save) and 'Abbrechen' (cancel).

From now on, in sellify//admin it is possible to define differently for each project type which statuses are valid for it. If no status has been assigned for a project type, this project will be output without status information. Thus, the progress of different project types can be kept in view even better from now on.

## 3. Organizations // People // Projects // Opportunities // Selections

## 3.4 Opportunities with foreign currencies

Allgemein
Details
Bemerkung
Verlauf



30 %

**dolfin - Einführung von sellify**

Neukunde

Angebot

**10.000,00** EUR

Organisation: dolfin campaigns

Person: Marks, Tom

Projekt: dolfin campaigns - Einführungsprojekt sellify

Wettbewerb:

Status: Offen

Abschluss bis: 30.07.2019

Wiedervorlage: 24.07.2019

Nummer: 10122

Verantwortlich: Krüger, Daniela Maria

Quelle:

SYP

THB

TWD

TZS

UAH

UGX


**USD**

VND

XAF

US Dollar

ZAR



30 %

**dolfin - Einführung von sellify**

Neukunde

Angebot

**10.000,00** USD

10.794,00 EUR

Erledigt

Speichern

Abbrechen

sellify now supports the tracking of opportunities in different currencies. For each opportunity entered in a foreign currency, sellify automatically determines the value of the opportunity converted into the local currency set for the user based on stored exchange rates. Currencies and exchange rates can either be maintained manually in sellify//admin or imported on a regular basis.

### 3. Organizations // People // Projects // Opportunities // Selections

#### 3.5 Progress documentation for opportunities

The screenshot shows the 'Verlauf' (History) tab for an opportunity. The opportunity is titled 'dolphin - Einführung von sellify' with a value of 10.000,00 EUR. It is a 'Neukunde' (New Customer) in the 'Verhandlung' (Negotiation) stage, with a probability of 80%. The history table shows four entries, all dated 16.07.2019 and performed by 'Krüger, Daniela Maria'. The entries describe updates to the data set, with the most recent one being the creation of the data set.

Datum	Benutzer	Was
16.07.2019	Krüger, Daniela Maria	Datensatz aktualisiert (Stufe: Verhandlung   Wahrscheinlichkeit: 80 %   Betrag: 10.0...
16.07.2019	Krüger, Daniela Maria	Datensatz aktualisiert (Stufe: Verhandlung   Wahrscheinlichkeit: 80 %   Betrag: \$ 10...
16.07.2019	Krüger, Daniela Maria	Datensatz aktualisiert (Stufe: Angebot   Wahrscheinlichkeit: 30 %   Betrag: \$ 10.000,...
16.07.2019	Krüger, Daniela Maria	Datensatz erzeugt (Stufe: Angebot   Wahrscheinlichkeit: 30 %   Betrag: 0,00 €   Abs...

At the bottom of the history table, it indicates 'Anzahl 4' (Number of entries: 4) with a refresh icon. Below the table, there is a checkbox for 'Erledigt' (Completed) and a 'Bearbeiten' (Edit) button.

On opportunities, the user can now track changes to the record through the new "History" tab. Available data are "Date" (of the change incl. time), "User" and "What" (status, level, probability or value of the opportunity).



### 3. Organizations // People // Projects // Opportunities // Selections

#### 3.6 Filter options in the "History" tab

<span>Personen</span> <span>Beziehungen</span> <span>Aktivitäten</span> <span>Dokumente</span> <span>Chancen</span> <span>Projekte</span> <span>Selektionen</span> <span>Historie</span>								
		Datum (von - bis)	Typ <span>2</span>	Gruppe <span>1</span>	Person	Chance	Projekt	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13.06.2019 (09:15 - 10:45)	Sonstiges	Aufgaben; Termine			Marketingaktion 05.2019	
<input type="checkbox"/>	<input type="checkbox"/>	30.07.2019	Verhandlung	Neukunde	Marks, Tom	dolfin - Einführung von sellify	dolfin campaigns - Einführur	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	29.11.2017	Zusage	Sonstiges		Dokumentation Leitfaden sellify ...	sellify 2.1 - Customizing Vert	
<input type="checkbox"/>	<input type="checkbox"/>	15.07.2019 (12:25 - 16:00)	Besprechung (intern)	Termine			Marketingaktion 05.2019	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	28.06.2019 (10:00 - 10:30)	Besprechung (intern)	Termine	Mann, Sebastian		Marketingaktion 05.2019	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	17.05.2019 (14:00 - 16:00)	Besprechung (intern)	Termine	Marks, Tom		Marketingaktion 05.2019	

In the "History" tab, a user can now use the "Group" column to display the headings of the assigned type groupings for activities and documents and the sales types for opportunities. The "Type" column has been adjusted and now shows the status for opportunities instead of their type.

## 3. Organizations // People // Projects // Opportunities // Selections

## 3.7 Copy selections

The screenshot shows two side-by-side panels of the software interface. The left panel displays a selection named 'Alle Personen 07.2019' with a 'Selektion kopieren' button highlighted by a red circle '1'. A dialog box titled 'Selektion kopieren' is open, showing a text field for 'Selektionsname' containing 'Alle Personen 08.2019', with a red circle '2' next to it. The right panel shows a selection named 'Alle Personen 08.2019' with a red circle '3' next to it. Below the panels are two tables of 'Selektionsmitglieder' (selection members).

	Kontakt	Adresse	E-Mail
→	✓ Akbay, Ismail (Bitware Software & Dienstleistungen GmbH)	Moselmeer Straße 13-15, 52062 Aachen	
→	☐ Albasson, Mariella (Portofam Beteiligungs- & Finanzdienstleistungen G...)	Merowingerstraße 42, 50677 Köln	
→	☐ Bach, Bianca (Logistik Heinrich)	Berliner Straße 15, 12487 Berlin	
→	☐ Bach, Werner (BGV Steuerberater)	Kippelweg 12, 50374 Erftstadt	
→	☐ Baumgärtner, Annika-Louise (Portofam Beteiligungs- & Finanzdienstlei...)	Merowingerstraße 42, 50677 Köln	
→	☐ Becker, Jonas (Elektro Schmidt)	Kölner Straße 2, 50687 Köln	

	Kontakt	Adresse	E-Mail
→	☐ Abramoski, Raphael (AZ Handels AG)	Hans-Böckler-Platz 78, 71069 Sindelfingen	r.at
→	☐ Akbay, Ismail (Bitware Software & Dienstleistungen GmbH)	Moselmeer Straße 13-15, 52062 Aachen	i.ak
→	☐ Albasson, Mariella (Portofam Beteiligungs- & Finanzdienstleistungen G...)	Merowingerstraße 42, 50677 Köln	ma
→	☐ Bach, Bianca (Logistik Heinrich)	Berliner Straße 15, 12487 Berlin	b.b
→	☐ Bach, Werner (BGV Steuerberater)	Kippelweg 12, 50374 Erftstadt	
→	☐ Baumgärtner, Annika-Louise (Portofam Beteiligungs- & Finanzdienstlei...)	Merowingerstraße 42, 50677 Köln	ant
→	☐ Becker, Jonas (Elektro Schmidt)	Kölner Straße 2, 50687 Köln	j.ba

By popular request, selections can now not only be combined with each other, but also an existing selection including all selection members can be copied.

## 4. Activities // Documents

### 4.1 Drag & Drop extension for documents

The image shows three sequential screenshots of a software interface demonstrating a drag-and-drop extension for documents.

**Screenshot 1:** A document icon (labeled '1') is being dragged from a file explorer into an activity window titled 'Besprechung (intern)'. The activity window shows details for a meeting on 24.07.2019. A confirmation dialog box appears, asking: 'Um diese Aktion auszuführen muss der Datensatz gespeichert werden. Möchten Sie fortfahren?' (To perform this action, the record must be saved. Do you want to proceed?). The dialog has 'OK' and 'Abbrechen' (Cancel) buttons. A blue circle with the number '2' is next to the dialog.

**Screenshot 2:** The document is now visible in the activity window's document list. The list shows a document titled 'Eing. Dokument' with the name 'Besprechungsprotokoll 24.07.2019\_dolfin'. The document details show a date of 16.07.2019 and a status of 'Nicht gesetzt'. A blue circle with the number '3' is next to the document list.

**Screenshot 3:** The document is now visible in the activity window's document list. The list shows a document titled 'Eing. Dokument' with the name 'Besprechungsprotokoll ...'. The document details show a date of 16.07.2019 11:23, contact 'dolfin campaigns', and type 'Eing. Dokument'. A blue circle with the number '4' is next to the document list.

Users can now also archive documents by dragging and dropping them into an open activity or document dialog, even if it has been newly created and not yet saved. This means that it is no longer necessary to call up the dialog again after saving.

## 4. Activities // Documents

### 4.2 Extension of certain activities by one priority

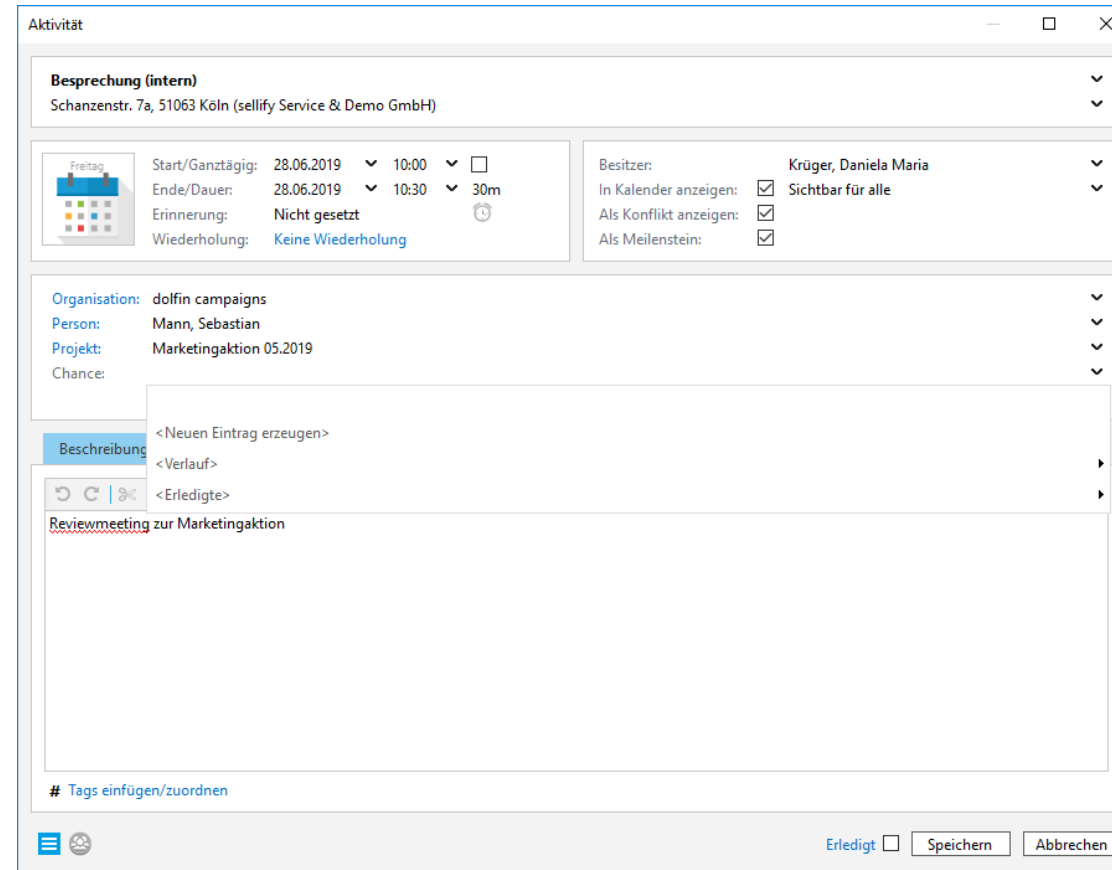
The screenshot displays the 'Folgeaufgabe - Priorität' application interface. The main window is titled 'Folgeaufgabe - Priorität' and has two tabs: 'Liste' and 'Benutzergruppen'. The 'Liste' tab is active, showing a search bar with the placeholder text 'Listeneintrag suchen'. Below the search bar is a table with three columns: 'Rang', 'Listeneintrag', and a dropdown arrow. The table contains three rows: '1' with 'Niedrig', '2' with 'Mittel', and '3' with 'Hoch'. A blue circle with the number '1' is overlaid on the 'Listeneintrag' column header. To the right of the table is a 'Überschrift' field with a dropdown arrow. Below this field are several icons for actions like '+', '-', 'copy', 'paste', 'up', 'down', and 'Gelöscht'. A checkbox labeled 'Gruppenspezifische Sichtbarkeit für diese Li' is checked. Below this is a dropdown menu titled 'Sichtbar für (Benutzergruppe)' with a list of user groups: 'Administration', 'Vertrieb', 'Technik', 'Service', 'Sekretariat', and 'Geschäftsführung'. The 'Geschäftsführung' group is selected and highlighted in blue. A blue circle with the number '2' is overlaid on the 'Geschäftsführung' group. At the bottom of the main window are buttons for '+ Hinzufügen', '- Löschen', 'up/down arrows', 'Export', 'Gelöschte', and 'Anzahl 1/3'. A 'Schließen' button is located at the bottom right of the main window. A secondary window titled 'Aktivität' is open on top of the main window. It has a dropdown menu for 'Sonstiges' with 'Priorität' selected. Below this is a list of priority levels: 'Niedrig', 'Mittel', and 'Hoch'. A blue circle with the number '2' is overlaid on the 'Niedrig' priority level. Below the priority list are fields for 'Organisation: dolfin campaigns', 'Person:', and 'Projekt:'. A 'Schließen' button is also present at the bottom right of the 'Aktivität' window.

For activities of type "task" it is now possible to assign a priority and thus classify tasks in sellify. Who is allowed to use this function can be defined in sellify//admin by visibilities.



## 4. Activities // Documents

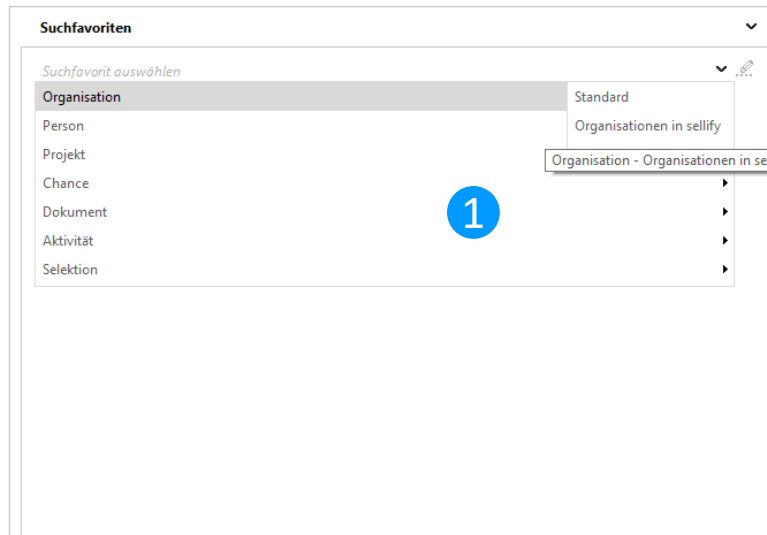
### 4.3 Linking completed opportunities and projects



In the activities and document dialog, a new menu item "<Completed>" is now available for linking opportunities and projects. If a completed opportunity or project is to be linked, this data record is now already pre-grouped in the new menu item.

## 5 sellify//search

### 5.1 Search favorites in the Minicard



The screenshot shows the 'Suchfavoriten' (Search Favorites) window. The 'Organisationen in sellify' header is highlighted, and a blue circle with the number '2' is placed over it. The table below lists various organizations with columns for Organisation, Besuchsadresse - Straße, Besuchsad..., Besuchsadresse - Ort, Kontaktart, and Verantwortlich.

Organisation	Besuchsadresse - Straße	Besuchsad...	Besuchsadresse - Ort	Kontaktart	Verantwortlich
sellify Service & Demo GmbH	Schanzenstr. 7a	51063	Köln	Lieferant	Heinz Walter
Elektro Schmidt	Kölner Straße 2	50687	Köln	Kunde	Heinz Walter
Logistik Heinrich	Berliner Straße 15	12487	Berlin	Partner	Heinz Walter
Reisebüro Büsch	Frankfurter Straße 15	51126	Köln	Kunde	Heinz Walter
AZ Versicherungen	Münchener Straße 15	80331	München	Kunde; Dive...	Heinz Walter
Sachverständigenbüro Voigt und Kollegen	Gladbacher Straße 105	51469	Bergisch Gladbach	Diverse	Heinz Walter
Consulting Group B+K	Aachener Straße 45	50687	Köln	Kunde	Heinz Walter
XY Bank	Frankfurter Straße 100	50645	Köln	Partner	Heinz Walter
Software AG Ein Unternehmen der Techmatic...	Kempener Straße 11	50667	Köln	Diverse	Heinz Walter
Pharma Unternehmen Pels	Marienburger Straße 45	51469	Bergisch Gladbach	Interessant	Heinz Walter
Maschinenbau Eilers	Frankfurter Straße	60311	Frankfurt	Kunde	Heinz Walter
Steuerberater Schneider	Neusser Straße 1005	51469	Bergisch Gladbach	Partner	Niklas Zuther
business//acts GmbH	Schanzenstraße 7a	51063	Köln	Lieferant	Heinz Walter
AZ Handels AG	Hans-Böckler-Platz 78	71069	Sindelfingen	Interessant	Heinz Walter
ZEBO Präzisionswerkzeuge Hermann Pfistere...	Schleifmühle 7	74321	Bietigheim-Bissingen	Partner	Heinz Walter
ABC Handels GmbH Großhandlung für Brau...	Postweg 12	45527	Hattingen	Kunde	Heinz Walter
Erich Diekmann GmbH	Grüner Talstr. 18	59644	Irrel...	Kunde	Heinz Walter

At the bottom of the window, there are checkboxes for 'Folgen' (checked) and 'Dubletten' (unchecked), and a text 'Anzahl 1/27' with a refresh icon.

Using the "Search Favorites" selection in the Minicard, users can now display their personal search favorites as well as standard and group favorites and the resulting result lists.

## 5 sellify//search

### 5.2 Default search favorites for all areas

Suchen

Organisation Person (108) Projekt Chance Dokument Aktivität Selektion

Favoriten Standard

Name	Filter
<input checked="" type="checkbox"/> Anrede	Enthält
<input checked="" type="checkbox"/> Vorname	Enthält
<input checked="" type="checkbox"/> Nachname	Enthält
<input checked="" type="checkbox"/> Organisation	Enthält

Anrede	Vorname	Nachname	Organisation
Herr	Heinz	Walter	sellify Service & Demo GmbH
Herr	Wolfgang	Schmidt	Elektro Schmidt
Herr	Jonas	Becker	Elektro Schmidt
Herr	Tobias	Pfeifer	Elektro Schmidt
Herr	Henrik	Pütz	Elektro Schmidt
Herr	Max	Breuer	Elektro Schmidt
Herr	Herbert	Heinrich	Logistik Heinrich
Herr	Lukas	Schmitz	Logistik Heinrich
Frau	Bianca	Bach	Logistik Heinrich
Herr	Guido	Großbach	Logistik Heinrich
Frau	Hanna	Kirschner	Logistik Heinrich
Herr	Ralf	Büsch	Reisebüro Büsch

— Löschen Alle

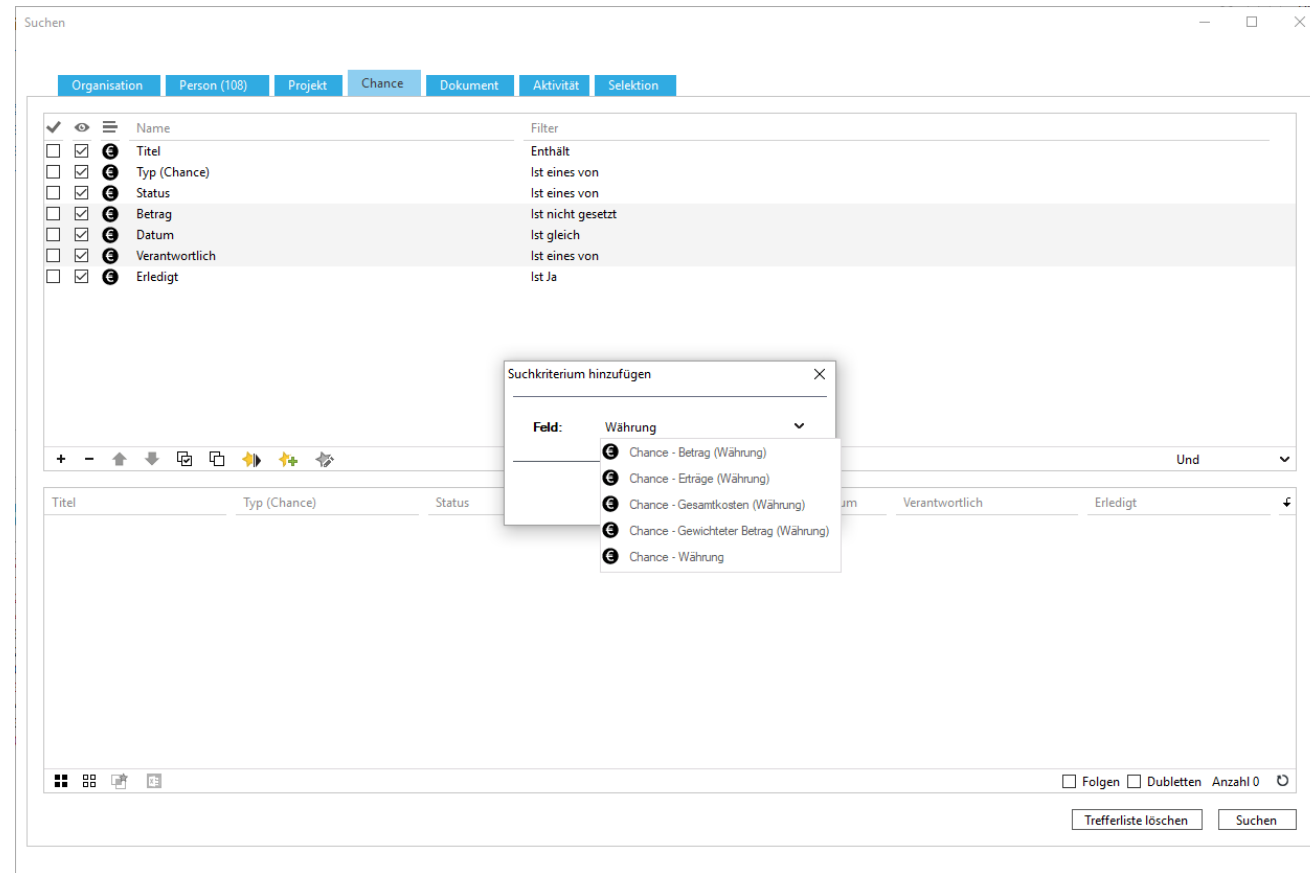
Folgen  Dubletten  Ausgeschiedene Anzahl 108

Trefferliste löschen Suchen

With the introduction of a search favorite "Standard" for each area of the search, the user is provided with a meaningful column set for the search within the respective area. This set can be customized by authorized users to meet the needs of the organization.

## 5 sellify//search

### 5.3 Search for currency fields



If amounts are searched for in sellify, the result now displays them in the local currency set for the user. In addition, new search criteria are available to display different currencies if they are allowed in the system.



## 6. sellify//admin

### 6.1 Restricting the visibility of user groups

Benutzergruppe

Name: Administration

Tooltip:

Versteckt:

Benutzer

[ Benutzer suchen ]

Vorname	Nachname	Login
Dominik	Köhler	Köhler
Lukas	Schmelzer	Schmelzer
Niklas	Zuther	Zuther
Sebastian	Pfeifer	Pfeifer
Tino	Jenniges	Jenniges

→ Primär

→ Sekundär

← Entfemen

Anzahl 5

[ Benutzer suchen ]

Vorname	Nachname	Login	Primär
Heinz	Walter	admin	Nein
Alexander	Schulz	Schulz	Nein
Tom	Langer	Langer	Nein
Daniel	Herd	Herd	Nein
Fabian	Borchert	Borchert	Nein
Daniela Maria	Krüger	DAKR	Nein

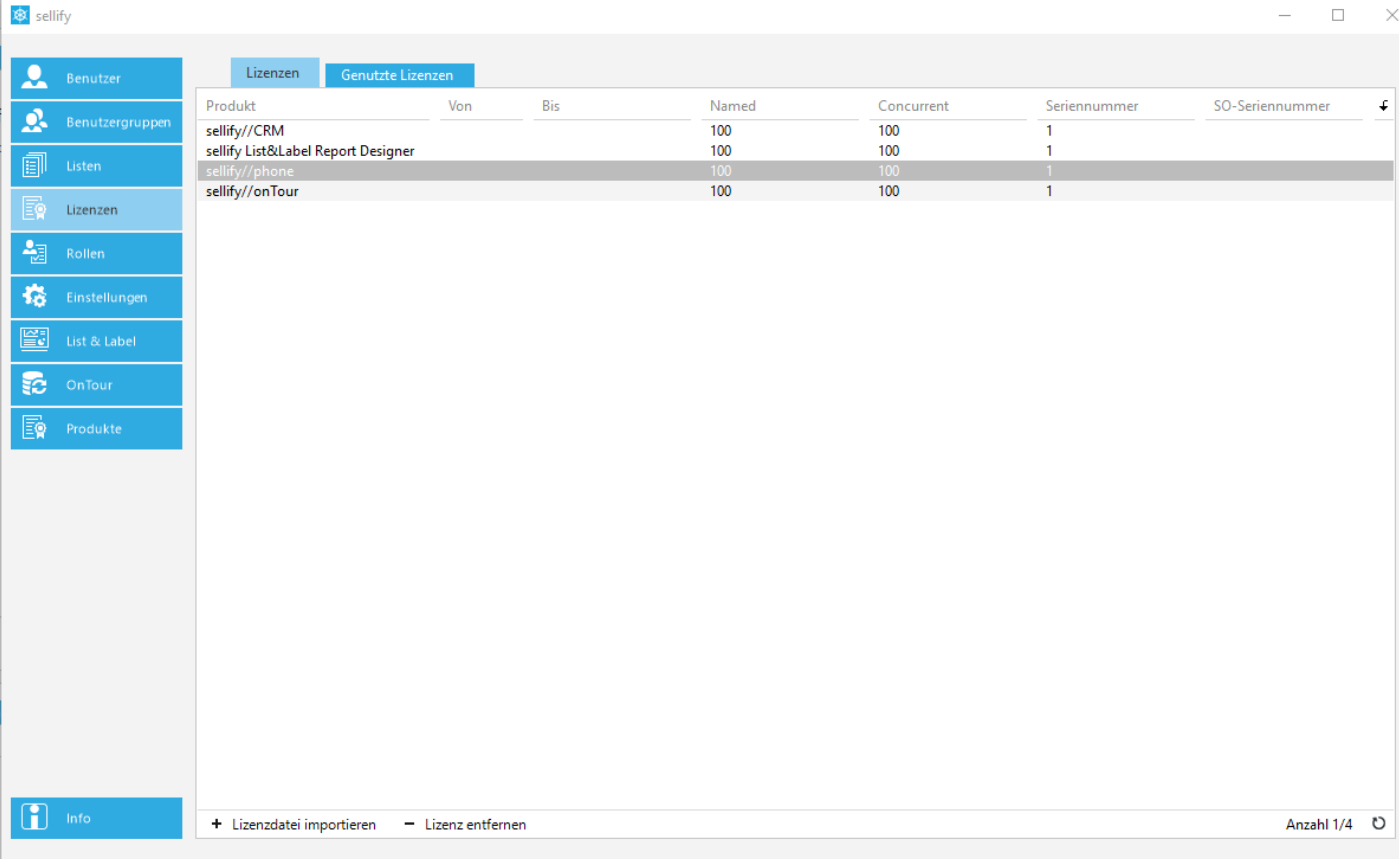
Anzahl 6

Speichern Abbrechen

For administrative organization, user groups can be marked as hidden. These are no longer displayed in the sellify interface.

## 6. sellify//admin

### 6.2 License check for sellify//phone



The screenshot shows the 'sellify' application window with a sidebar menu on the left and a main content area. The sidebar menu includes: Benutzer, Benutzergruppen, Listen, Lizenzen (highlighted), Rollen, Einstellungen, List & Label, OnTour, and Produkte. The main content area has two tabs: 'Lizenzen' and 'Genutzte Lizenzen' (selected). Below the tabs is a table with the following data:

Produkt	Von	Bis	Named	Concurrent	Seriennummer	SO-Seriennummer	
sellify//CRM			100	100	1		
sellify List&Label Report Designer			100	100	1		
sellify//phone			100	100	1		
sellify//onTour			100	100	1		

At the bottom of the table, there are two buttons: '+ Lizenzdatei importieren' and '- Lizenz entfernen'. In the bottom right corner, it says 'Anzahl 1/4' with a refresh icon.

The use of sellify//phone can now be released for individual users.