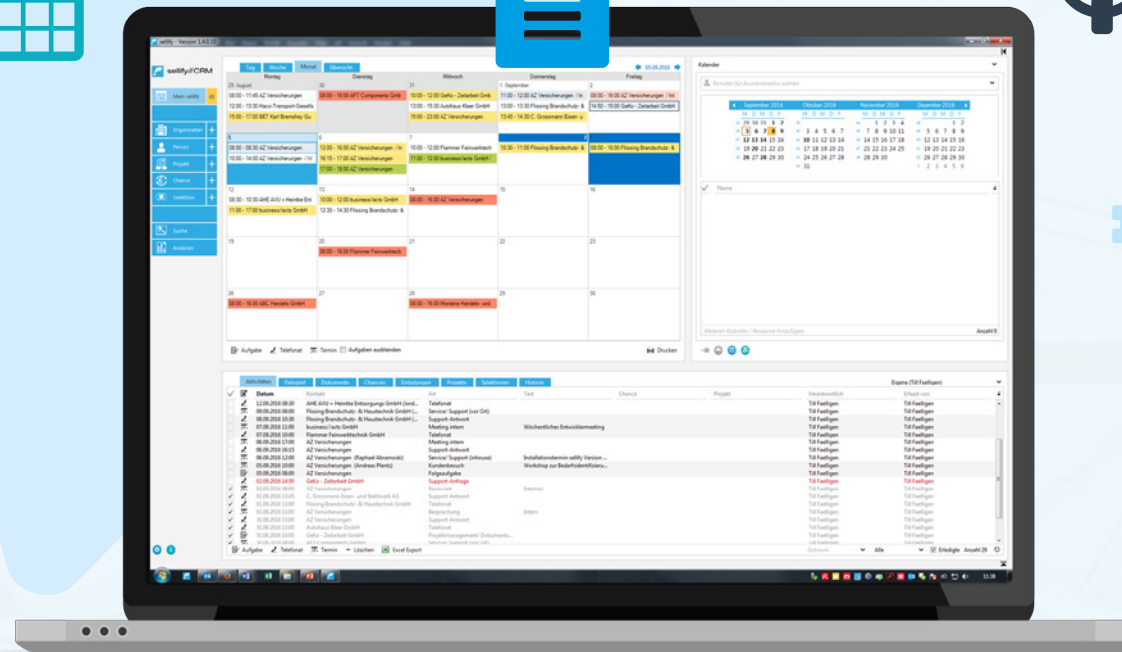




Changelog – What's new?

Release 3.7 – New features, improvements, bug fixes





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3.7

New features & improvements

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General

Extension for GDPR-compliant work with sellify



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With the European General Data Protection Regulation in force since May 25, 2018, we have made some additions to sellify. These are intended to support you in implementing the requirements of the new regulation in a legally compliant manner with sellify. In the card view for persons, you will find the tab 'GDPR' for this from sellify 3.7. (1)

The implementation covers the following topics:

- Storage of data origin (2), legal basis (3) and purpose of collection (4) incl. the option to store additional information as a comment; determination of the expiration date depending on the selected legal basis.
- Deposit of data recipients in the event that personal data of the data subject has been passed on to third parties. (5)

General

Extension for GDPR-compliant work with sellify



The screenshot shows the sellify software interface. On the left, there's a navigation menu with options like 'Organisation', 'Person', 'Projekt', 'Chance', 'Selektion', 'Suche', and 'Analyse'. The main area displays a profile for 'Herr Manuel Hoppe' with various data points and a table of data recipients. A context menu is open over the GDPR icon, showing options like 'Einverständniserklärung einholen' and 'DSGVO Personenauskunft'. A second window, labeled '2', shows a detailed 'Personenauskunft' report for Herr Manuel Hoppe, including contact information, personal data, and GDPR compliance details.

Personenauskunft
nach den Richtlinien der Datenschutz-Grundverordnung

Herr Manuel Hoppe
Vertriebsleiter

business//acts
Business Consulting • Software Solutions

Portofam
Portofam Beteiligungs- & Finanzdienstleistungen GmbH
Merowingerstraße 42, 50677 Köln
+49 89 455979700
service@portofam.de www.portofam.de

Personenbezogene Daten

Telefon +49 89 455979716
Privatnummer -
Mobil +49 150122688911
Fax +49 89 455979700
Anderes -
E-Mail manuel.hoppe@portofam.de
Social Media
Privatadresse -

Datenschutzgrundverordnung

Datenherkunft: Geschäftsabschluss, ausgehende Kontaktaufnahme
Rechtsgrundlage: Berechtigtes Interesse, Einwilligung des Betroffenen
Erhebungszweck: Dokumentation aktive Geschäftsbeziehung
Ablaufdatum: 03.07.2020
Datenempfänger: Peter Landshut (Software AG Ein Unternehmen der Techmatics AG), Boris Hose (business//acts GmbH)

Profileigenschaften

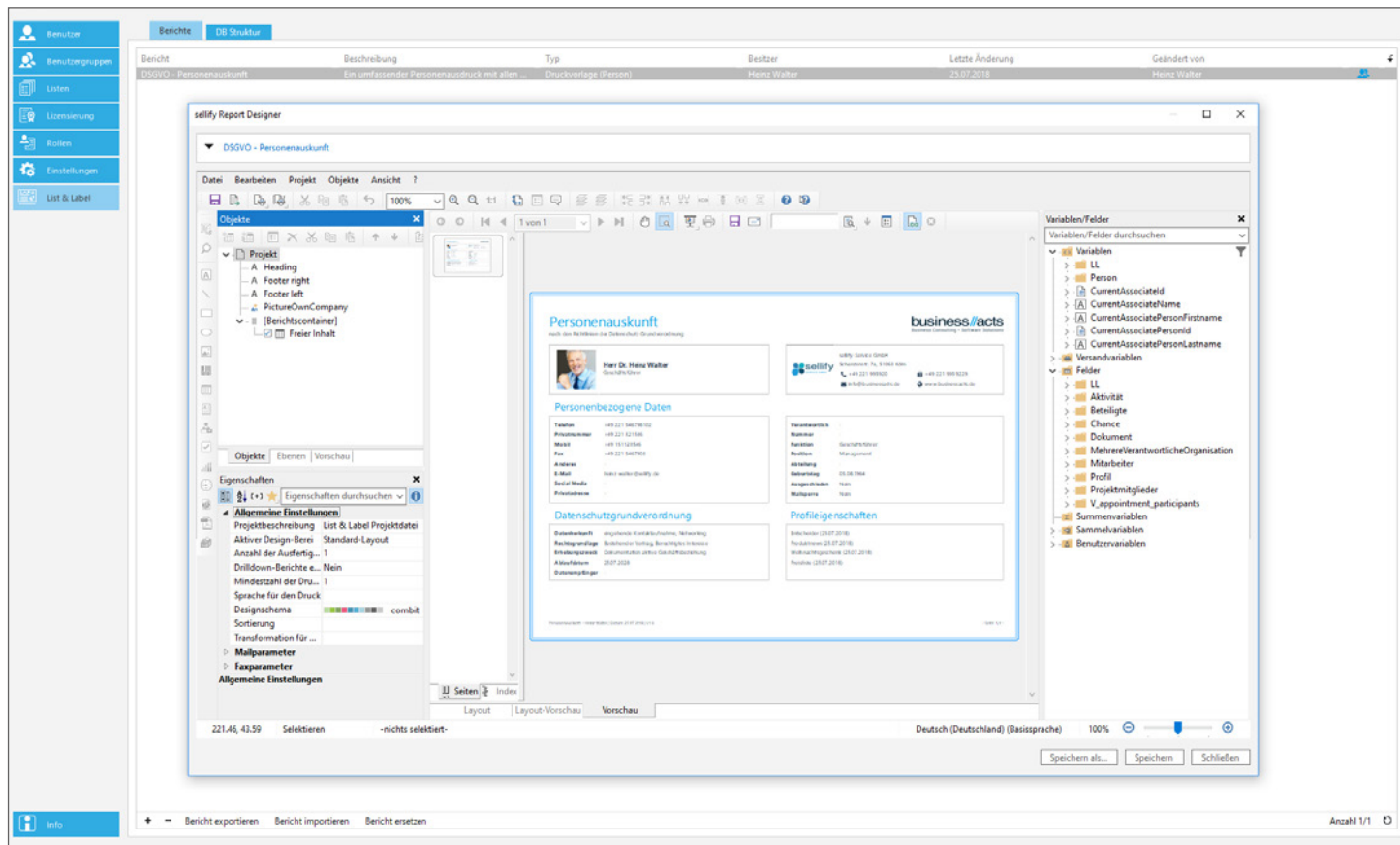
Produktnews (26.07.2018)
Weihnachtskarte (26.07.2018)
Referenz (26.07.2018)

Personenauskunft - Manuel Hoppe | Datum: 26.07.2018 | v1.6 - Seite 1/2 -

- Personal information report with all relevant personal information (2)
- Function for deletion of personal data, anonymization of persons and organization of revocations of disclosure
- Templates (declaration of consent, deletion/anonymization confirmation and deletion request for data recipients) are available for direct sending by email via the GDPR context menu. (1)
- The GDPR-relevant fields are available as columns in archive views. The functions of the context menu on the GDPR icon of the person card can also be found in the context menu of persons in archive views.

General

Integration of the List & Label report designer



In sellify//admin, the 'List & Label' section is now available for creating, editing and managing classic reports, print templates (e.g. map views from sellify) as well as document templates.

List & Label allows you to insert placeholders into your reports/templates without in-depth database knowledge, so that they are automatically filled with the desired data from sellify. You can publish the reports and templates either for a specific area (organization, person, project, opportunity) or as a general report in the Analyses section of the sellify main menu.

General

Integration of the List & Label report designer



Personenauskunft
nach den Richtlinien der Datenschutz-Grundverordnung

business//acts
Business Consulting - Software Solutions

 **Herr Dr. Heinz Walter**
Geschäftsführer

 sellify-Service GmbH
Schanzenstr. 7a, 51063 Köln
☎ +49 221 995920 📠 +49 221 9959229
✉ info@businessacts.de 🌐 www.businessacts.de

Personenbezogene Daten

Telefon	+49 221 546798102	Verantwortlich	-
Privatnummer	+49 221 321546	Nummer	-
Mobil	+49 151123546	Funktion	Geschäftsführer
Fax	+49 221 5467903	Position	Management
Anderes	-	Abteilung	-
E-Mail	heinz-walter@sellify.de	Geburtsstag	05.08.1964
Social Media	-	Ausgeschlossen	Nein
Privatadresse	-	Mailsperre	Nein

Datenschutzgrundverordnung

Datenherkunft	eingehende Kontaktaufnahme, Networking
Rechtsgrundlage	Bestehender Vertrag, Berechtigtes Interesse
Erhebungszweck	Dokumentation aktive Geschäftsbeziehung
Ablaufdatum	25.07.2028
Datenempfänger	-

Profileigenschaften

Entscheider (25.07.2018)
Produktnews (25.07.2018)
Weihnachtsgeschenk (25.07.2018)
Preisliste (25.07.2018)

Personenauskunft - Heinz Walter | Datum: 25.07.2018 | v1.6 - Seite 1/1 -

Person report
according to the guidelines of the General Data Protection Regulation

business//acts
Business Consulting - Software Solutions

 **Herr Dr. Heinz Walter**
Geschäftsführer

 sellify-Service GmbH
Schanzenstr. 7a, 51063 Köln
☎ +49 221 995920 📠 +49 221 9959229
✉ info@businessacts.de 🌐 www.businessacts.de

Personal data

Phone	+49 221 546798102	Responsible	-
Personal number	+49 221 321546	Number	-
Mobile	+49 151123546	Funktion	Geschäftsführer
Fax	+49 221 5467903	Position	Management
Other	-	Department	-
E-Mail	heinz-walter@sellify.de	Birthday	05.08.1964
Social media	-	Resigned	No
Personal address	-	Mailstop	No

General Data Protection Regulation

Data source	direct contact (incoming), Networking
Legislative basis	existing contract, legitimate interest
Purpose of use	Documentation of active business relationship
Expiration date	25.07.2028
Data receiver	-

Profile information

Entscheider (25.07.2018)
Produktnews (25.07.2018)
Weihnachtsgeschenk (25.07.2018)
Preisliste (25.07.2018)

Person report - Heinz Walter | Date: 25.07.2018 | v1.6 - Page 1/1 -

You can control the publishing of your reports/templates at the user group level, which gives you control over the visibility of the documents. Depending on the usage, you can change the output format so that your reports can just be a document template or an attachment for an email template, for example. Output formats include: Adobe PDF, XHTML/CSS, Microsoft Word/Excel/PowerPoint/XPS, CSV, XML, RTF, image formats BMP/JPG/PNG/EMF/SVG/TIFF (also multi-page).

The sellify language variables are available for the multilingualism of your reports. The language of print reports depends on the language set in sellify. For reports used as email attachments, the communication language controls the report language.

General

Introduction of tags for activities and documents (keywording)



The screenshot displays the sellify CRM interface. The main window shows the 'Aktivität' (Activity) form for 'Portofam Beteiligungs- & Finanzdienstleistungen GmbH'. The form includes fields for 'Wiedervorlage' (Recurrence), 'Start/Ganztägig' (Start/Full-day), 'Ende/Dauer' (End/Duration), 'Erledigt am' (Completed on), and 'Wiederholung' (Repetition). Below these are fields for 'Organisation', 'Person', 'Projekt', and 'Chance'. A 'Beschreibung' (Description) field is present, and below it is a 'Tags' field with a dropdown menu. The dropdown menu is open, showing suggestions: 'DSGVO', 'Einwilligung des Betroffenen', and 'DSGVO Einverständnis'. A second dropdown menu is also visible, showing 'Tags' and 'DSGVO'. Arrows point from the 'Tags' field to the dropdown menus.

As a user, you can now add keywords/tags to activities and documents to place them in a higher-level topic context. Since tags are directly related to descriptions, this function is placed below the existing description fields in a separate line as a hyperlink.

A click on the hyperlink opens the multiple entry for your tags. During the input, previously used tags are suggested to you. In the archive views for activities, documents and history, you can filter by the tags once the corresponding column has been displayed. In addition, the tags are available as search criteria (filter and DKS).

Note: You add the new column in the respective archive view by right-clicking on the table header and selecting 'Configure columns'.

General

Extension of multilingualism



The screenshot displays the sellify user interface. On the left, there is a navigation sidebar with options like 'Mein sellify', 'Organisation', 'Person', 'Projekt', 'Chance', 'Selektion', 'Suche', and 'Analysen'. The main area shows a user profile for 'Manuel Hoppe' with contact information and a 'Kalender' (Calendar) view. The calendar shows months from July to September 2018. A language selection dropdown is open, showing 'deutsch' and 'englisch' as options. A tooltip message reads: 'Es wurde keine Kommunikationsprache festgelegt. Deshalb wird alternativ die Sprache deutsch verwendet.'

1. Communication language:

For organizations and persons, you can specify the respective communication language to the left of the favorites function. In edit mode, a left click takes you to the selection list with the communication languages stored in `sellify//admin`. Via the list 'Communication language' in `sellify//admin` you can create and edit the required languages.

The communication language controls the use of document templates and their language dependent contents.

General

Extension of multilingualism



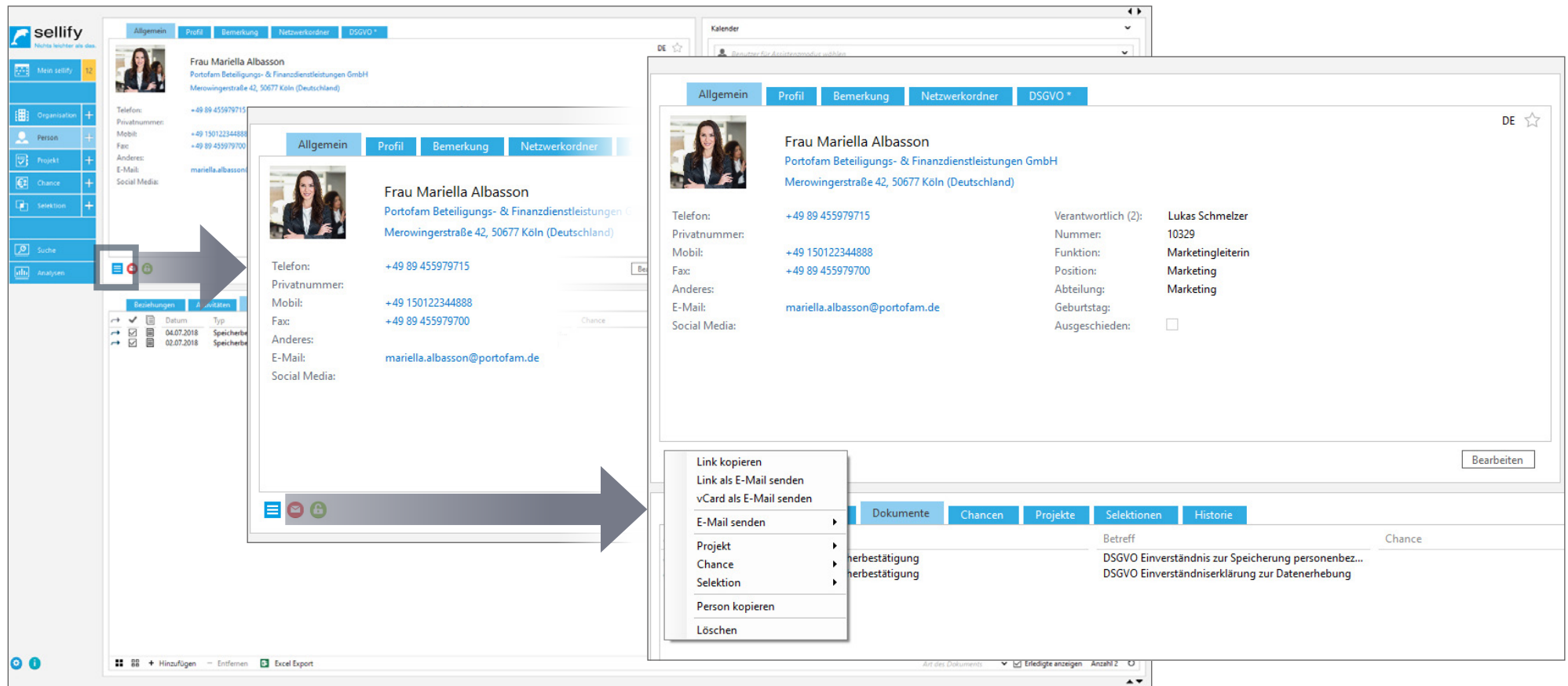
The screenshot illustrates the 'Extension of multilingualism' feature in the sellify software. It shows a list of entries in a table with columns for 'Rang', 'Listeneintrag', and 'Gelöscht'. A specific entry is highlighted, and a dialog box opens to configure its multilingualism. The dialog box has a 'Name' field with a dropdown menu showing 'Herr' and 'Mr.', and a 'Sprache' field with a dropdown menu showing 'deutsch' and 'englisch'. The dialog box also has a 'Hinzufügen' button and a 'Schließen' button.

2. Change multilingualism for list administration in sellify//admin:

You can now define the multilingualism in individual lists (value, tooltip and other language-dependent values) via a multiple selection. The hyperlink opens the corresponding input mask in which you assign the defined communication languages to the inputs. For document templates, you can now store language-dependent template files, which are called up depending on the set communication language. In addition, you can now define attachments for e-mail templates. When creating a mail from sellify, these attachments are attached to the mail. Due to the multilingualism, the manual entry of the country-specific salutation for persons (Mr., Mrs., Mr.) is no longer necessary, since sellify automatically uses the corresponding salutation based on the set communication language. Enter the profiling of your salutations for all defined communication languages. The communication language of the organization/person then controls the salutation in letters.

General

Optimization of the icon for the menu call



The previous 'blue arrow' icon in map and dialog views has been replaced by the commonly used 'burger icon' (3 dashes below each other) already known from web or mobile applications.

Organizations, people, projects, opportunities, selections

Unification of linking dialogs



The image displays two screenshots of the sellify interface, illustrating the unification of linking dialogs. Both screenshots show a user profile for 'Frau Mariella Albasson' and a calendar view. The main focus is on the 'Aktivität verknüpfen' (Link activity) dialog boxes.

Screenshot 1 (Left): Shows the dialog for linking an activity to an organization. The dialog has tabs for 'Alle', 'Organisation', 'Person', 'Projekt', and 'Chance'. The 'Organisation' tab is selected. Below the tabs is a search bar and a table of search results. A large grey arrow points down from the table to the dialog's main content area.

Datum (von - bis)	Kontakt	Typ	Beschreibung	Besitzer
04.07.2018 (10:50 - 1...	Mariella Albasson (Po...	Wiedervorlage		Heinz Walter
14.02.2019 (12:30 - 1...	Andreas Plentz (AZ Ve...	Besprechung (intern)		Lukas Schmelzer
12.12.2018 (14:06 - 1...	Maria Seidel (AZ Vers...	Telefonat (eingehend)		Niklas Zuther
07.12.2018 (12:29 - 1...	Torsten Meyer (AZ V...	Service		Niklas Zuther
28.11.2018 (09:18 - 0...	Andreas Plentz (AZ Ve...	Wiedervorlage		Heinz Walter
14.02.2019 (12:00 - 1...	Petra Meinertzhagen ...	Besprechung (intern)		Niklas Zuther
07.02.2019 (11:00 - 1...	Andreas Plentz (AZ Ve...	Besprechung (intern)		Niklas Zuther
10.02.2019 (14:27 - 1...	Andreas Plentz (AZ Ve...	Telefonat (eingehend)	Bitte um Rückruf zwe...	Heinz Walter

Screenshot 2 (Right): Shows the dialog for linking an activity to a project. The dialog has tabs for 'Alle', 'Organisation', 'Person', 'Projekt', and 'Chance'. The 'Projekt' tab is selected. Below the tabs is a search bar and a table of search results. A large grey arrow points down from the table to the dialog's main content area.

Datum (von - bis)	Kontakt	Typ	Beschreibung	Besitzer
[Suche]				
[Suche]				

For the link between different objects in sellify (e.g. persons to projects, documents to activities, participants to activities) we have improved and standardized the associated dialog.

On the one hand, you have direct access via your personal history list. Here you can assign the respective records without further input. (1)

On the other hand, you can obtain search results even faster and more effectively thanks to new, flexible pre-filters. (2)

Organizations, people, projects, opportunities, selections

Unification of linking dialogs



The individual search options in the dialog are divided into different tabs:

- All - This option displays your history list for the searched object when you call it for the first time. As soon as you make entries in the search field, the search result is displayed from all data records of the respective object. The entries in the search field perform the same searches that you know from the quick search of the navigator, for example. If you remove the search terms, the history list appears again.
- My Favorites - If your searched object is a person and/or organization, the 'My Favorites' tab is displayed. Here you can directly apply the records.
- Colleagues - For a quick assignment of employees of your own organization, the 'Colleagues' tab is available, which lists all colleagues. Using the search field, you can quickly narrow down the search results by first and last name. In addition, quick filters are available for your own locations, primary groups and all user groups.
- Competitors - Here you will find all organizations marked as competitors via the contact type 'Competitors'.
- Organization - The organization specified here serves as a pre-filter for the searched object. For example, if you want to link activities, the searcher result will give you all activities of the given organization. You can select the organization from the organization history list or from the quick search.
- Person/Project/Opportunity/Selection - analogous to Organization, serves as a pre-filter for the searched object.
- Contact type - if the searched object is an organization, you can select a contact type as a filter criterion in the 'Contact type' tab.
- Branch - If the searched object is an organization, you can select a branch as a filter criterion in the 'Branch' tab.
- Organization responsible - If the searched object is an organization, you can select an organization responsible as a filter criterion in the 'Organization responsible' tab.
- Project type - If the searched object is a project, you can select a project type as a filter criterion in the 'Project type' tab.
- Status - If the searched object is a project, you can select the project status as a filter criterion in the 'Status' tab.
- Project responsible - If the searched object is a project, you can select a project responsible as a filter criterion in the 'Project responsible' tab.

In the respective result lists you can configure the required columns additionally via the column configuration. You can also use the column filters to further narrow down the search result.

In the status bar of the linking dialog, there are optional buttons for entering new persons or organizations (search result type Person or Organization - e.g. project members and opportunity participants).

Organizations, people, projects, opportunities, selections

Linking dialogs - improvement when transferring from selections



The screenshot shows the 'sellify' software interface. The main window displays a contact profile for 'Herr Dr. Heinz Walter' from 'sellify-Service GmbH'. A 'Projekt' dialog is open, showing a list of contacts under the 'Selection' tab. The 'Projektmitglied hinzufügen' dialog is also open, showing a table of project members. The table has columns for 'Kontakt', 'Funktion', and 'Information'. The 'Funktion' column is highlighted in red for some entries, indicating that the function has not yet been specified.

Kontakt	Adresse	E-Mail	Telefon
Elektro Schmidt	Kölnner Straße 2, 50667 Köln	info@elektro-schmidt.de	+49 221 32488
Rezeption Büsch	Frankfurter Straße 15, 53129...	info@rezeptionbuersch.de	+49 221 409465
Consulting Group B+K	Aschener Straße 45, 50687...	consulting@b+k.de	+49 221 799456
XY Bank	Frankfurter Straße 100, 50645...	info@bank.de	+49 221 15987
Software AG Ein Unternehm...	Kempener Straße 11, 50667...	info@software.de	+49 221 4567890

Kontakt	Funktion	Information
Consulting Group B+K	Projektmitglied	
XY Bank	Projektmitglied	
Elektro Schmidt	Projektmitglied	

When maintaining project members, opportunity participants or relationships, the 'Selection' tab is available in the link dialog. There you can access the selection members of a given selection.

Note: The specification of the 'Function' for project members and opportunity participants is now a mandatory field and is accordingly displayed in red if you have not yet made the specification.

Organizations, people, projects, opportunities, selections

Optimization of opportunities & change of project members & opportunity participants



The screenshot displays the 'sellify' software interface. On the left is a navigation menu with options like 'Organisation', 'Person', 'Projekt', 'Chance', and 'Selektion'. The main area shows a company profile for 'AZ Versicherungen' and a list of opportunities. A 'Chance' window is open, showing details for 'Lizenzverkauf 1309' with a value of 666,00 €. A dropdown menu is open over the 'Status' field, showing options like 'Gewonnen', 'Verkauft am', and 'Grund'. A larger, detailed view of the 'Chance' window is shown on the right, with fields for 'Organisation', 'Person', 'Projekt', 'Wettbewerb', 'Status', 'Verkauft am', 'Grund', 'Wiedervorlage', 'Nummer', 'Verantwortlich', 'Quelle', and 'Sichtbar für'.

The fields offered in sellify for opportunities that are dependent on status have been unified for sellify 3.7:

- | | |
|--------------------------|--|
| Status open (no change): | Completed by / Resubmission |
| Status won: | Sold on / reason / resubmission |
| Status lost: | Lost on / reason / resubmission |
| Status interrupted: | Interrupted on / reason / resubmission |

Organizations, people, projects, opportunities, selections

Improvement of the relationship dialog



You can now directly create a new person (dialog for a person relationship) and a new organization (dialog for an organization relationship) when entering a new relationship (1).

To do this, first select the relationship type. (2)

Then click the button 'New person' in the lower area of the relationship dialog. (3)

Depending on the context, a new person or organization dialog opens for creating the new record. (4)

The newly created person/organization is then automatically transferred to the previously defined relationship.

Organizations, people, projects, opportunities, selections

Mail lock active by default when creating new persons



The screenshot shows the 'sellify' CRM interface. On the left is a navigation menu with options like 'Mein sellify', 'Organisation', 'Person', 'Projekt', 'Chance', 'Selektion', 'Suche', and 'Analyse'. The main area displays a person's profile for 'Herr Thomas Wendlich' from 'Software AG Ein Unternehmen der Techmatics AG'. The profile includes contact information and a 'Mail lock' icon (a red padlock) in the bottom left corner of the profile card. A large grey arrow points from this icon to a larger, detailed view of the profile card on the right. This detailed view shows the same information as the main profile but with a 'Mail lock' icon (a red padlock) in the bottom left corner, indicating that the feature is active by default.

Due to the changed regulations in the context of the General Data Protection Regulation as of 25.05.2018 (GDPR), the feature 'Mail lock' is activated by default when creating a new person.

If you do not want the lock, you must deactivate it here by clicking on it.

Organizations, people, projects, opportunities, selections

Adjustment of address line without set person address in edit mode



The screenshot shows the 'sellify' CRM interface. The main window displays the profile of 'Herr Thomas Wendlich' from 'Software AG Ein Unternehmen der Technatics AG'. The address is 'Kempener Straße 11, 50667 Köln (Deutschland)'. A tooltip explains: 'Die dargestellte Adresse ist die Adresse der Organisation, da der Person keine eigene Adresse zugeordnet wurde. Durch Mausklick wird diese Adresse in OpenStreetMap dargestellt.' A large grey arrow points from this tooltip to the address field in the edit mode view.

Edit Mode View:

Allgemein | Profil | Bemerkung | Netzwerkordner | DSGVO

Herr Thomas Wendlich
Software AG Ein Unternehmen der Technatics AG
[Kempener Straße 11, 50667 Köln \(Deutschland\)](#)

Telefon: +49 221 45678910
Privatnummer: +49 491 51233500666
Mobil: +49 491 51233500666
Fax: +49 221 45678900
Anderes: th.wendlich@software.ag
Social Media:

Nummer: 10339
Funktion: Business Development Manager
Position: Vertrieb
Abteilung: Sales
Geburtsdag:
Ausgeschieden:

DE ☆

If you have not assigned an individual address to a person, the address of the associated company will be displayed at this point as of sellify 3.7. It is still possible to enter a different address for the person.

Activities & Documents

Improvement for e-mail archiving from 'Sent items'



The screenshot displays the sellify web interface. On the left, a navigation sidebar includes 'Organisation', 'Person', 'Projekt', 'Chance', 'Selektion', 'Suche', and 'Analyse'. The main content area is divided into several sections:

- Header:** 'sellify-Service GmbH' with contact information (E-Mail, Telefon, Fax, Webseite) and details (Verantwortlich: Heinz Walter, Nummer, Kontaktart: Lieferant, Branche: Dienstleistung, Code, UID-ID-Nr.).
- Kalender:** A calendar view for July, August, September, and October 2018.
- Personen:** A list of contacts with columns for 'Datum' and 'Person'. The list includes names like Heinz Walter, Tom Langer, Niklas Zuther, Sebastian Pfeifer, and Alexander Schult.
- Dokument Dialog:** A central modal window titled 'Dokument' with the following details:
 - Titel:** 'Email (ausgehend)'
 - Untertitel:** 'sellify Outlook Archivierung für 'Gesendete Objekte' setzt automatisch den Dokumenttyp 'Ausgehende E-Mail''
 - Datum:** 23.07.2018
 - Wiedervorlage:** Nicht gesetzt
 - Unser Zeichen:** Ihr Zeichen: ...
 - Organisation:** business/acts GmbH
 - Person:** Thomas Wendlich
 - Projekt:**
 - Chance:**
- Table:** A table with columns 'Besitzer' and 'Anzahl Anlagen'. It lists various users and their corresponding counts, such as Heinz Walter (0), Niklas Zuther (0), and Lukas Schmelzer (0).

In Outlook, when you archive an email from the 'Sent Items' folder to sellify, the document type 'Outgoing Email' is now automatically suggested to you.

To do this, click the 'Archive' button in Outlook as usual or drag and drop the email to sellify to open the document dialog.



The screenshot shows the 'Person - Akademischer Titel' list in the sellify//admin interface. The list has columns for 'Name', 'Gelöscht', 'Anzahl Einträge', and 'Einträge bearbeitbar'. A dialog box titled 'Listeneintrag' is open, showing a table of entries with columns for 'Rang', 'Listeneintrag', and 'Gelöscht'. The entry 'Dr.' is selected. A smaller dialog box is also open, showing the 'Name' field with 'Dr. Prof.' and the 'In Anrede verwenden' checkbox checked. The 'Info' button is highlighted in the bottom left corner.

Name	Gelöscht	Anzahl Einträge	Einträge bearbeitbar
Allgemein - Beziehung	Nein	10	Ja
Allgemein - Land	Nein	246	Ja
Allgemein - Ressource	Nein	5	Ja
Angebot - Lieferant	Nein	0	Nein
Angebot - Lieferbedingungen	Nein	0	Nein
Angebot - Zahlungsart	Nein	0	Nein
Angebot - Zahlungsbedingungen	Nein	0	Nein
Aufgabe - Typ	Nein	0	Nein
BA_Familie	Nein	0	Nein
Dokument - Vorlage	Nein	0	Nein
DSGVO - Datenherkunft	Nein	0	Nein
DSGVO - Erhebungszweck	Nein	0	Nein
DSGVO - Rechtsgrundlage	Nein	0	Nein
Einladung - Ablehnungsgrund	Nein	0	Nein
Firma - Branche	Nein	0	Nein
Firma - Interesse	Nein	0	Nein
Firma - Kategorie	Nein	0	Nein
Folgeaufgabe - Priorität	Nein	0	Nein
Folgeaufgabe - Typ	Nein	0	Nein
Gruppe - Anhang	Nein	0	Nein
Kommunikationsprache	Nein	0	Nein
Organisation - Verantwortliche (Funktion)	Nein	0	Nein
Parameterzusatz	Nein	0	Nein
Person - Akademischer Titel	Nein	0	Nein
Person - Hr./Fr.	Nein	0	Nein
Person - Interesse	Nein	0	Nein
Person - Position	Nein	0	Nein
Person - Verantwortliche (Funktion)	Nein	0	Nein
Produkt - Abonnementeinheit	Nein	0	Nein
Produkt - Familie	Nein	0	Nein
Produkt - Kategorie	Nein	0	Nein
Produkt - Pressenheit	Nein	0	Nein
Produkt - Typ	Nein	0	Nein
Projekt - Status	Nein	0	Nein
Projekt - Typ, Stufen	Nein	0	Nein
Projektmitglied - Funktion	Nein	0	Nein
Reporte	Nein	0	Nein
Selektion - Typ	Nein	0	Nein
Verkauf - Grund (aufgehoben)	Nein	0	Nein
Verkauf - Grund (verkauft)	Nein	0	Nein
Verkauf - Grund (verloren)	Nein	0	Nein
Verkauf - Quelle	Nein	0	Nein
Verkauf - Rolle (Verkaufsinteressent)	Nein	0	Nein
Verkauf - Typ, Kategorie	Nein	0	Nein

As of sellify 3.7, you can individually define for academic titles, such as Dr. or Dipl.Ing., whether they should be used in salutations when outputting documents.

Via the list 'Person - Academic title' in sellify//admin you can define the property 'Use in salutation' for the individual entries. In the address, all titles are always placed between Mr./Mrs. and first name/last name.

BUGFIXES

Various



3.7

- Maintenance of relationship types (admin-side) - in the 'General - Relationship' list in `sellify//admin`, the passive form of a relationship is now hidden if the relationship has not been marked as 'mutual'.
- Optimization of the person address - if a person has no address stored, the address of the assigned organization is automatically displayed. The tooltip shows the origin of the address. The jump to OpenStreetMaps now also works with a displayed organization address.
- Template variables - For some variables, the assigned rank was output incorrectly during subsequent editing. All template variables that point to multiple fields (e.g. email, phone) now pass the value with the lowest rank. This ensures that the value displayed in sellify is also passed to a template.
- Unification of search results for person and organization - In the quick searches (navigation and dialogs), persons and organizations are displayed uniformly.
- Organization search in dialogs - In the search result for organizations in dialogs (Activity, Document, Opportunity, Person) the found organizations are displayed with relevant information. In addition to the company name, the number, postal code + city of the visiting address, code and VAT ID number are also displayed - thus an organization can be uniquely identified.
- Copy projects - If a project is being edited, the 'Copy project' function will result in a message that no new project can be saved.