


ReflexClient 4.2: New features

Volume Software is pleased to introduce ReflexClient **version 4.2**. This version includes many evolution relating to the agenda, contacts and notes. Let's detail the changes we made to improve even further ReflexClient.

Agenda

Syncing appointments for which I am the organizer

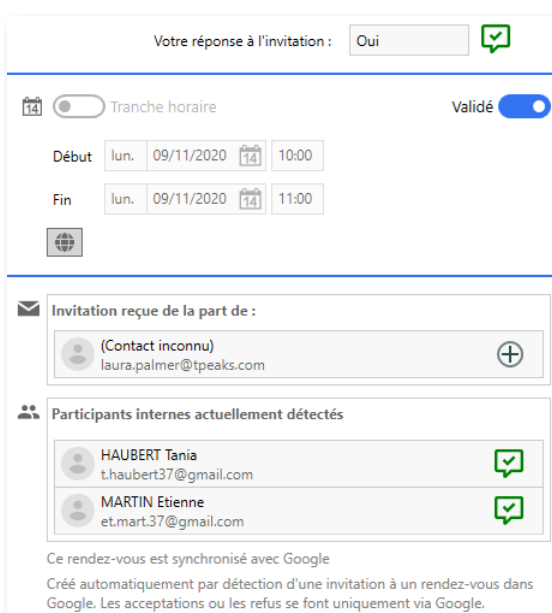


Appointments created in my external agenda are immediately synced with ReflexClient.

The appointment details window displays all invited attendees and their reply.

Recurring appointments are synced in the same fashion as standard appointments (see "[Management of recurring appointments](#)").

Syncing appointments to which I am invited



The appointment is immediately synced in ReflexClient, whether the organizer belongs or not to my contacts.

After a server synchronization, if other internal users are also invited, they will appear in the list of attendees (as well as their reply).

Replies to invitations are no longer made in ReflexClient but in the external messaging, the reply is displayed in ReflexClient for information purposes only.

Recurring appointments are synced in the same fashion as standard appointments (see "[Management of recurring appointments](#)").

Description of events

The description of an event is transmitted when it is synced. If modifications are brought to the description in the external agenda, these are passed on to ReflexClient.

Below, the same appointment when it is created via Google (left), and then synced in ReflexClient (right).

RDV Dampiert Vallon

Événement

Mercredi, 4 novembre 10:00am – 12:30pm

☐ Toute la journée Fuseau horaire

Une seule fois ▾

[Rechercher un horaire](#)

Ajouter des invités

Ajouter une visioconférence Google Meet

Ajouter des lieux

B I U | | | |

RDV avec monsieur Fabrice BINET, Directeur général de Dampiert Vallon, suite à notre visite de prospection du 25/09/2020.
M. Binet aimerait notamment aborder le délai de mise en oeuvre ainsi que les différents modes de facturation.

Ajouter une pièce jointe

Etienne Martin ●
Occupé · Visibilité par défaut · Avertir 30 minutes avant

Autres options **Enregistrer**

RENDEZ-VOUS

Société ▾

RDV Dampiert Vallon+

Lieu

Visite Client ▾

RDV avec monsieur Fabrice BINET, Directeur général de Dampiert Vallon, suite à notre visite de prospection du 25/09/2020.
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Description complémentaire

Pièces jointes

Opportunité de vente ▾

Supprimer ID #10018

This description cannot be modified in ReflexClient. For this purpose, the **Complementary description** window is available, allowing you to enter notes which you'll be able to modify at will.

Co-workers agenda

The events belonging to a third party agenda are now identified by initials of the user, displayed in a coloured square.

Mon agenda	LUNDI	MARDI	MERCREDI
<input checked="" type="checkbox"/> MARTIN Etienne	2 novembre	3	4
Agendas des collaborateurs			
<input checked="" type="checkbox"/> ABAYLLIE Georges	09:30 Formation+	GA 09:00 Gallileo	09:00 L'Atelier du Pic Vert
<input checked="" type="checkbox"/> HAUBERT Tania	GA 10:00 Dore Eglantine	TH 09:00 Orea	09:30 Formation+
	TH 13:00 Daniel SA	09:30 Formation+	GA 16:00 Imprimerie Martineau

Agenda configuration

A new check box offers the ability to disable the synchronization of recurring events and a cursor now enables to limit the horizon in the future. This prevents you from syncing to many recurring events, for example if several daily appointments are synced over a full year.

Options de synchronisation

Quoi ? ☒ Absences ☒ RDV ☒ RDV périodiques ☒ Tâches ☒ Annonces

Quand ? 90 + - Jours dans le passé

90 + - Jours dans le futur

Inclusion of shared agendas in the configuration of Gmail accounts.

SYNCHRONISATION AVEC UN AGENDA EXTERNE

Source ReflexClient

Synchronisation

Sera déclenchée

Agenda ex

Synchronisation

☐ Aucune d
 ☐ Outlook
 ☒ Google

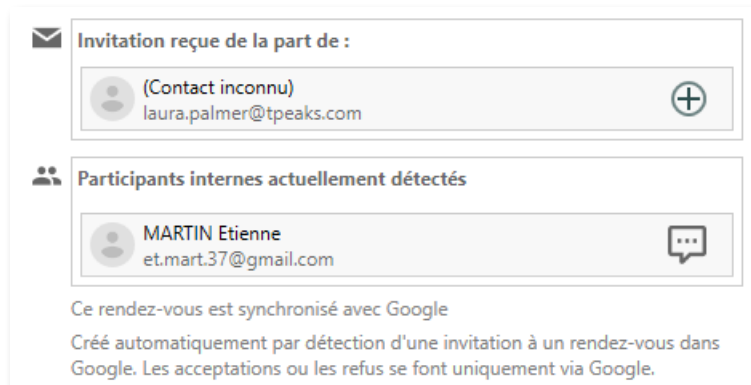
◀ The user agenda is designated as main agenda.

The shared agenda displays in the list.


Contacts

Management of invitations

Invitations from an organizer whose email address is unknown in ReflexClient are now imported.



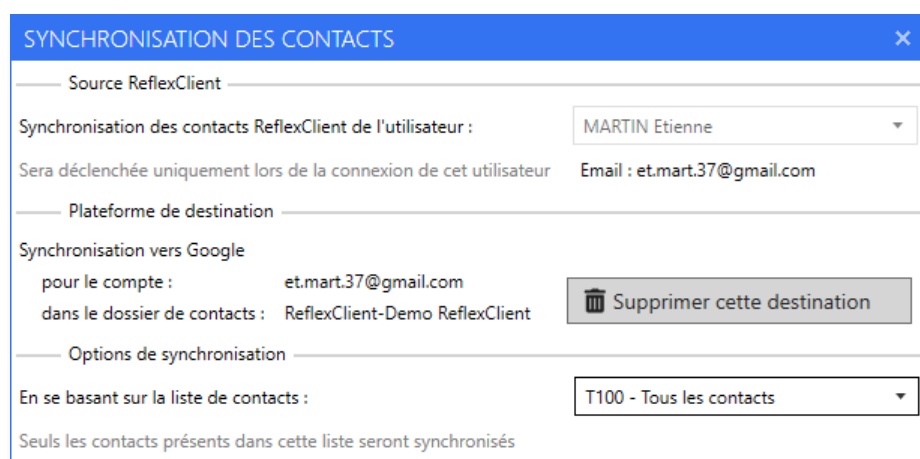
Contact creation

As shown in the screenshot above, the  button allows to create easily a contact from an unknown email address. When the address is under the name.surname@company.com, ReflexClient pre-fills the name and surname fields in the contact record, and if contacts belonging to the same company we already added, the company is also populated automatically.

Contact export

You can export ReflexClient contacts to Outlook/Google. The selection of exported contacts is based on a list among those available under the "Contacts" tab.

These contacts are exported in a specific folder named "ReflexClient-[environnement]".



Appointments

Management of recurring appointments

Recurring appointments are periodic events for which are defined a frequency and a horizon in your external agenda (for example, below, training sessions scheduled daily at 9:30). You can now import your recurring appointments from your external agenda to ReflexClient. The import conditions are the same as those which apply for non-recurring appointments. Recurring appointments are identified by their mauve colour:

2	3	4
09:30 Formation+	09:30 Formation+	09:30 Formation+

In the details window, a mention reminds the recurring nature of the appointment:

14

☐
Tranche horaire

Validé ☒

Début

lun.

02/11/2020

14

09:30


Fin

lun.

02/11/2020

14

10:30



Ce rendez-vous est périodique.

Please note that you can create exceptions by moving the appointment in your Google/Outlook agenda. This exception will be passed on to ReflexClient and, in the appointment details window, a text line will indicate the initial scheduling:

14

☐
Tranche horaire

Validé ☒

Début

jeu.

05/11/2020

14

09:30


Fin

jeu.

05/11/2020

14

10:30




Ce rendez-vous est périodique. Il était initialement prévu le 04/11/2020 09:30.

Appointment horizon

In the configuration screen for appointment lists, the "Include past appointments" window is replaced by a "Horizon in the past" cursor which allows you to limit the number of past appointments displayed.

Horizon des rendez-vous dans le passé :  jusqu'à 4 semaines

Horizon des rendez-vous dans le futur :  jusqu'à 2 semaines

☐ Inclure les rendez-vous annulés


Notes


New entry window



The note entry window was replaced.

You can now give a title to your notes (1) and assign colours to note types (2). The addition of attachments is now performed directly in the window (3).



NOTE


 Changement de Direction 1


 Informations commerciales 2


 


Depuis le changement de Direction en Janvier 2020, un tour d'horizon des fournisseurs a été lancé. Il va falloir suivre le client attentivement pour rester dans la course.

 Pièces jointes 3 

 Créée par : MARTIN Etienne Le lun. 14/10/2020 12:51

 Supprimer ID #4001 Enregistrer Annuler

 Informations générales

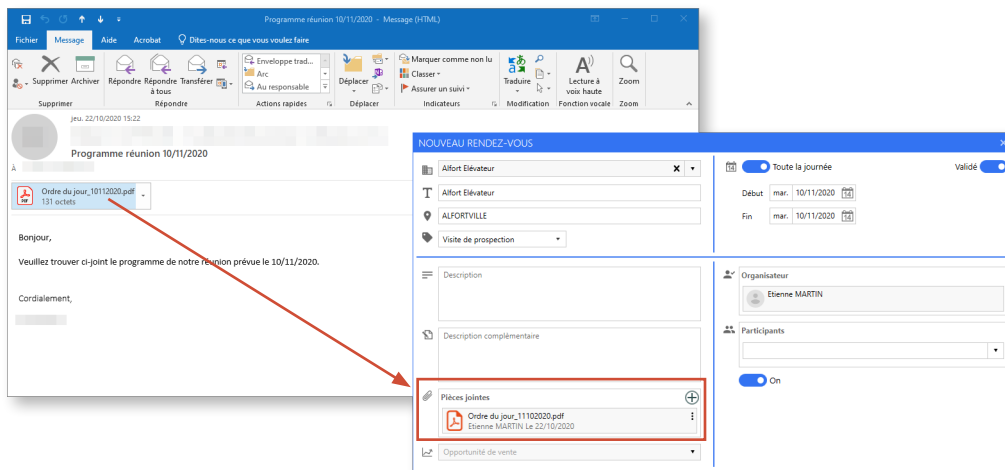
 Informations commerciale

◀ The colour flags enable you to identify quickly the various note types in the list of notes.

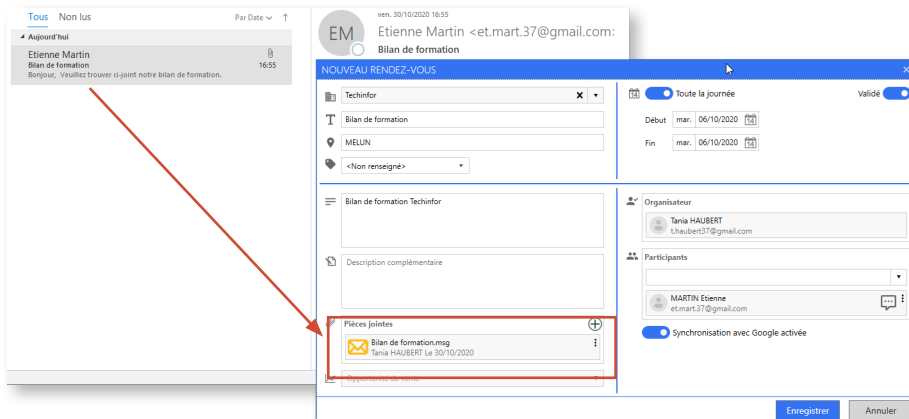
General

Addition of attachments

In Outlook, email attachments can, one by one, be drag-and-dropped to ReflexClient attachments, without having to save them beforehand.



In the same way, you can add a full email (attachments included) with a drag-and-drop from your messaging software.



Base administration

Choice of environment

The choice of an environment is now required when creating a client base. It is not necessary to intervene on existing bases.

Production cube

Cutting-die

The "Cutting-die" category was added to the list of available data in the production cube.