

ReflexClient 4.3: New features

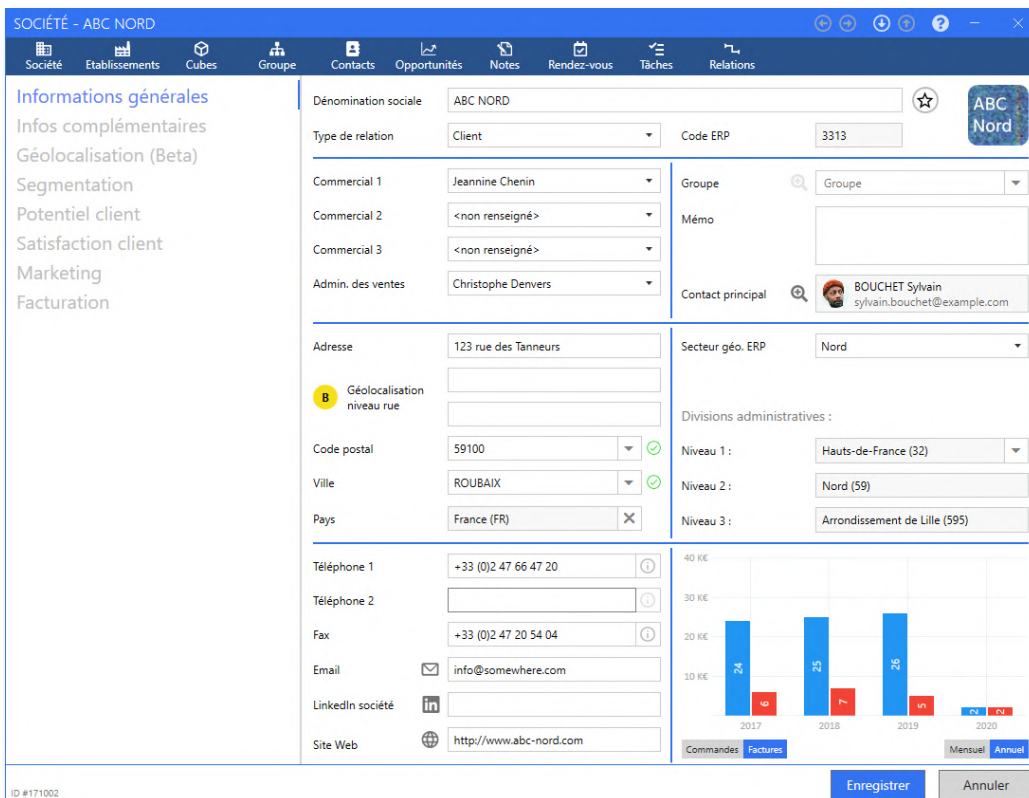
Volume Software is pleased to introduce ReflexClient version 4.3. This version introduces many **visual and practical enhancements** which push the user experience forward, including the complete overhaul of the **company record**, new user preferences and the ability to create **custom buttons**.

Let's see in detail what we changed to make ReflexClient even better.

The company record

Redesign of the record

In line with the **visual upgrades** introduced with version 4, it is now the turn of the company record to get a facelift.



SOCIÉTÉ - ABC NORD

Informations générales
Infos complémentaires
Géolocalisation (Beta)
Segmentation
Potentiel client
Satisfaction client
Marketing
Facturation

Dénomination sociale: ABC NORD
Type de relation: Client
Code ERP: 3313

Commercial 1: Jeannine Chenin
Commercial 2: <non renseigné>
Commercial 3: <non renseigné>
Admin. des ventes: Christophe Denvers

Groupe: Groupe
Mémo:
Contact principal: BOUCHET Sylvain
sylvain.bouchet@example.com

Adresse: 123 rue des Tanneurs
Géolocalisation niveau rue:
Code postal: 59100
Ville: ROUBAIX
Pays: France (FR)

Secteur géo. ERP: Nord
Divisions administratives:
Niveau 1: Hauts-de-France (32)
Niveau 2: Nord (59)
Niveau 3: Arrondissement de Lille (595)

Téléphone 1: +33 (0)2 47 66 47 20
Téléphone 2:
Fax: +33 (0)2 47 20 54 04
Email: info@somewhere.com
LinkedIn société:
Site Web: http://www.abc-nord.com

40 KE
30 KE
20 KE
10 KE
0 KE

2017 2018 2019 2020

Commandes Factures Mensuel Annuel

Enregistrer Annuler

ID #171002

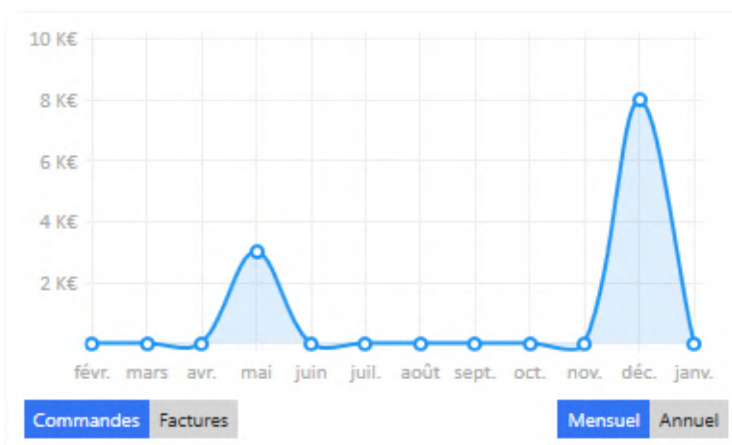
We **rearranged** the information contained in the company record:

- The **main topics** (company record, facilities, cubes, contacts, opportunities, jobs...) are moved in the **upper band**.
- Submenus**, which were located in tabs, are now displayed as **lists**, on the left.

Charts integration

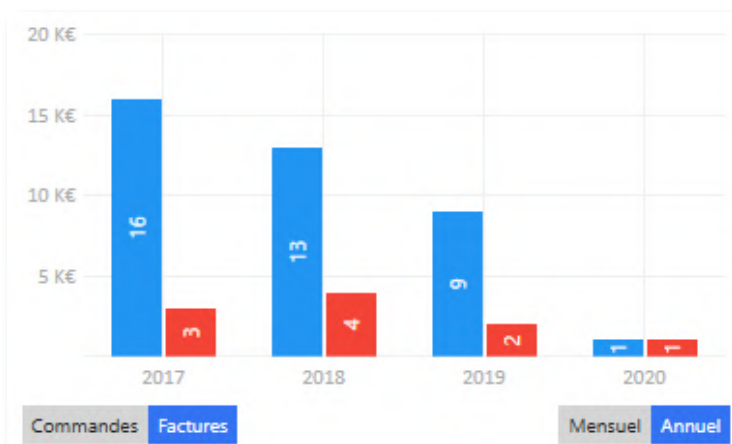
When using **ReflexClient CRM** in conjunction with **ReflexClient Cubes**, you have the option to **integrate data from the cubes** directly in the company record.

- Customer company records** can display data from the **Orders and Invoices cubes**



ReflexClient enables users to display the data for the current year, with a monthly breakdown.

◀ *Example of monthly order display*



Data can also be displayed annually for the last 3 years and the current year with, for each year, the annual totals and year-to-date data.

◀ *Example of annual invoice display*

- Supplier company records** can display data from the **Purchases cube**, following the same principles as stated above.

Entry of addresses

ReflexClient offers new features **to help with the entry of addresses**, which **simplify the entry** and **increase the reliability of the** input data.

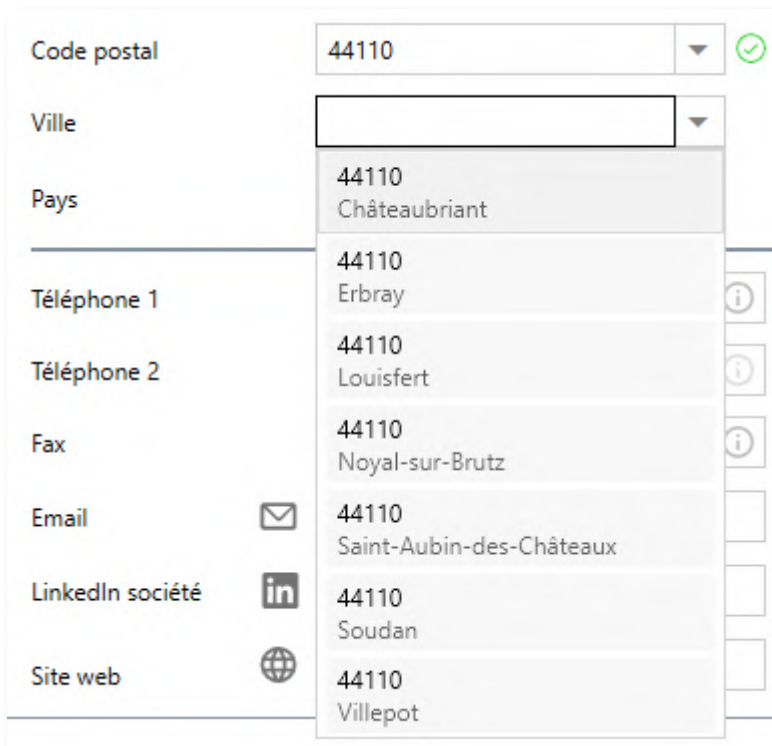
ReflexClient provide the localization data for **228 countries**, relying on the 'geonames.org' geographical database.

These localization data encompass:

- The **Zip code**
- The **City**
- **3 levels of administrative divisions** (regions, departments and districts for France)

Input assistance

94 countries are documented with the **complete list of zip codes and cities**, which means that when entering a zip code or city, ReflexClient will match the associated zip codes and cities:



Code postal	44110	✓
Ville		
Pays	44110 Châteaubriant	
Téléphone 1	44110 Erbray	i
Téléphone 2	44110 Louisfert	i
Fax	44110 Noyal-sur-Brutz	i
Email	44110 Saint-Aubin-des-Châteaux	
LinkedIn société	44110 Soudan	
Site web	44110 Villepot	

▲ After entering the zip code, ReflexClient retrieves the matching cities

A selector can be used to display the complete list of zip codes and cities of any country:

Contacts

Opportunités

Notes

Rendez-vous

Tâ

Dénomination sociale

ALCALIA

Type de relation

Client

Commercial 1

Etienne Martin

Commercial 2

<non renseigné>

Commercial 3

<non renseigné>

Admin. des ventes

Eric Maupassan

Adresse

N

Non géolocalisée

Code postal

Ville

Pays

Royaume-uni (GB)

Liste des codes postaux

Recherche par code postal.....

Recherche par ville.....

Code postal	Ville
AB10	Aberdeen
AB11	Aberdeen
AB12	Aberdeen
AB13	Aberdeen
AB14	Peterculter
AB15	Aberdeen
AB16	Aberdeen
AB21	Aberdeen
AB22	Danestone
AB22	Middleton Park
AB23	Belhelvie
AB23	Balmedie
AB23	Causeyend
AB23	Craigie

OK

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▲ After entering the country, the program displays all zip codes and cities for the UK

A green check mark or red cross shows whether the zip code and city are valid, and a broken link symbol indicates that the zip code and city are valid but **do not match**:

Code postal

37000

✓

Ville

PARIS

✗

The administrative divisions are automatically derived from the zip code:

Code postal

42210

✓

Ville

SAINT-LAURENT-LA-CONCHE

✓

Pays

France (FR)

✗

Divisions administratives :

Niveau 1 :

Auvergne-Rhône-Alpes (84)

Niveau 2 :

Loire (42)

Niveau 3 :

Arrondissement de Montbrison (421)

For the **134 countries** whose zip codes are not provided by geonames.org, a **grey hyphen** indicates that the zip codes and cities **cannot be verified** for this country:

Code postal	90000	▼	⊖
Ville	TANGER	▼	⊖
Pays	Maroc (MA)	✕	

Although geonames cannot determine automatically the administrative divisions for these countries, ReflexClient includes a selector to **enter them manually**:

Liste des divisions administratives						
Tanger						
Recherche par division administrative 2 ou par code 2						
Pays	Code 1	Division administrative 1	Code 2	Division administrative 2	Code 3	Division administrative 3
Maroc	MA01	Tanger-Tetouan-Al Hoceima	MA.01.051	Al-Hoceima	MA.01.051.0	Al-Hoceima
Maroc	MA01	Tanger-Tetouan-Al Hoceima	MA.01.151	Chefchaouen Province	MA.01.151.0	Chefchaouen Province
Maroc	MA01	Tanger-Tetouan-Al Hoceima	MA.01.227	Fahs-Anjra	MA.01.227.0	Fahs-Anjra
Maroc	MA01	Tanger-Tetouan-Al Hoceima	MA.01.331	Larache	MA.01.331.0	Larache
Maroc	MA01	Tanger-Tetouan-Al Hoceima	MA.01.573	M'Diq-Fnideq	MA.01.573.0	M'Diq-Fnideq
Maroc	MA01	Tanger-Tetouan-Al Hoceima	MA.01.0	Morocco (general)	MA.01.0.0	Morocco (general)
Maroc	MA01	Tanger-Tetouan-Al Hoceima	MA.01.405	Ouezzane Province	MA.01.405.0	Ouezzane Province
Maroc	MA01	Tanger-Tetouan-Al Hoceima	MA.01.511	Tanger-Assilah	MA.01.511.0	Tanger-Assilah
Maroc	MA01	Tanger-Tetouan-Al Hoceima	MA.01.571	Tetouan	MA.01.571.0	Tetouan

▲ Manual selection of administrative divisions

Code postal	90000	▼	⊖	Niveau 1 :	Tanger-Tetouan-Al Hoceima (01)	▼
Ville	TANGER	▼	⊖	Niveau 2 :	Tanger-Assilah (511)	
Pays	Maroc (MA)	✕		Niveau 3 :	Tanger-Assilah	

▲ Display of administrative divisions after their manual selection

Geolocation

The new **geolocation** functions are based on the OpenStreetMap project.

When you geolocate an address, you get a geolocation score indicating the **degree of accuracy** of the result:

- A** **Géolocalisation niveau adresse** Very good level of accuracy: The street number was found.
- B** **Géolocalisation niveau rue** Good level of accuracy: The street is found but not the number.
- C** **Géolocalisation niveau ville** The street is unknown: The location retrieved is in the center of the city.
- X** **Non trouvée** Geolocation failed. The address may contain errors.

ReflexClient offers 2 methods to geolocate a company.

Using the **General information** tab, users can click on the **Not geolocated** link:

Adresse: 123 rue des tanneurs

N Non géolocalisée

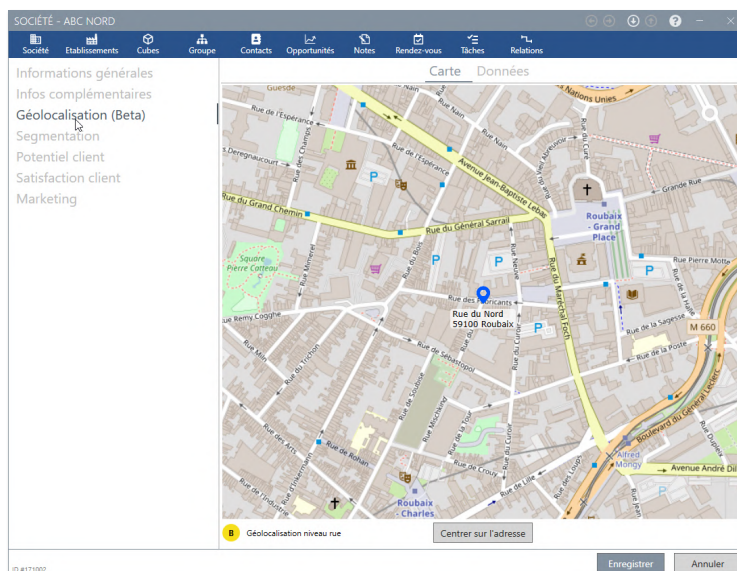
Code postal: 59100 ✓

Ville: ROUBAIX ✓

Pays: France (FR) ✕

Or by clicking on the Geolocation link in the left menu.

This action geolocates the address and displays it on a map:



◀ The geolocation results in a B level of accuracy: The map displays the found street.



Logo and LinkedIn integration

ReflexClient version 4.3 enables you to associate a logo with the company, which will be displayed in the top right corner of the company record.

Dénomination sociale	VOLUME SOFTWARE				
Type de relation	Fournisseur	Code ERP			

2 methods are available to do this:

- You can add the logo through drag-and-drop of an image file, or browsing your storage space:

LOGO DE LA SOCIÉTÉ

Glissez et déposez dans le cercle pour mettre à jour le logo
ou

Parcourir...

Supprimer

Valider

Annuler

- Or, better still, you can use our new **LinkedIn integration**:

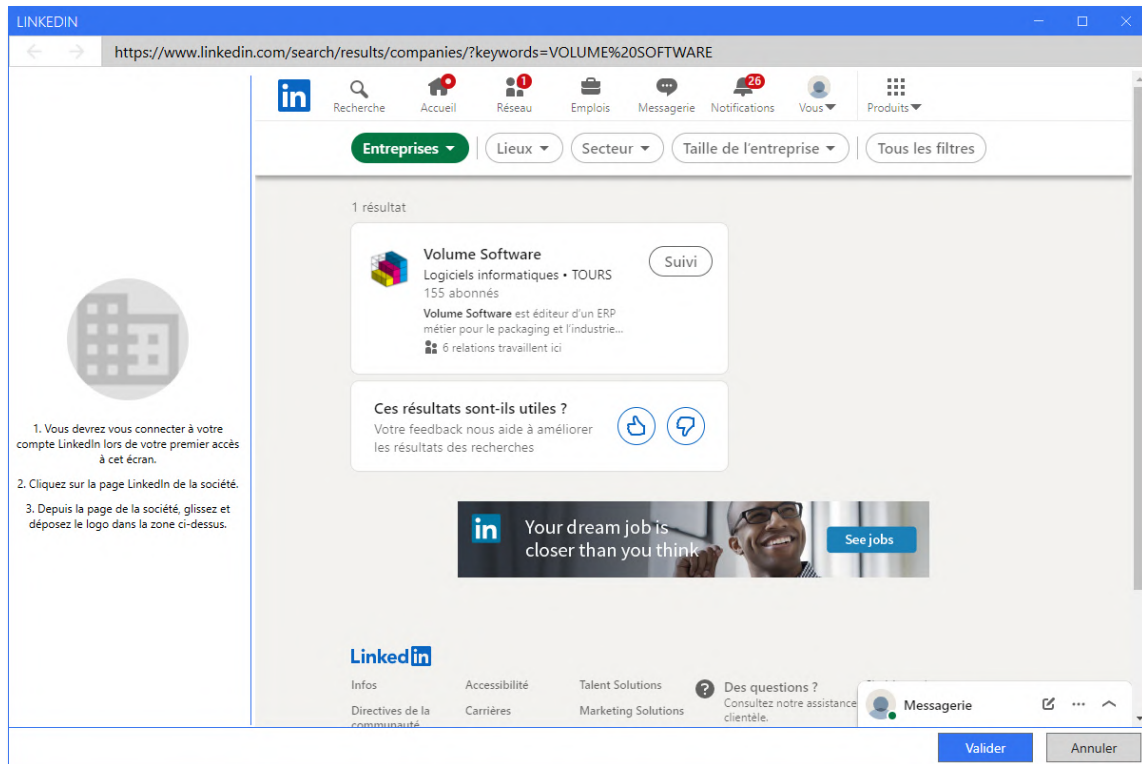
1. Click on the **Company LinkedIn** button

Téléphone 1		
Téléphone 2		
Fax		
Email	info@volume-software.com	
LinkedIn société		
Site web	http://www.volume-software.com	

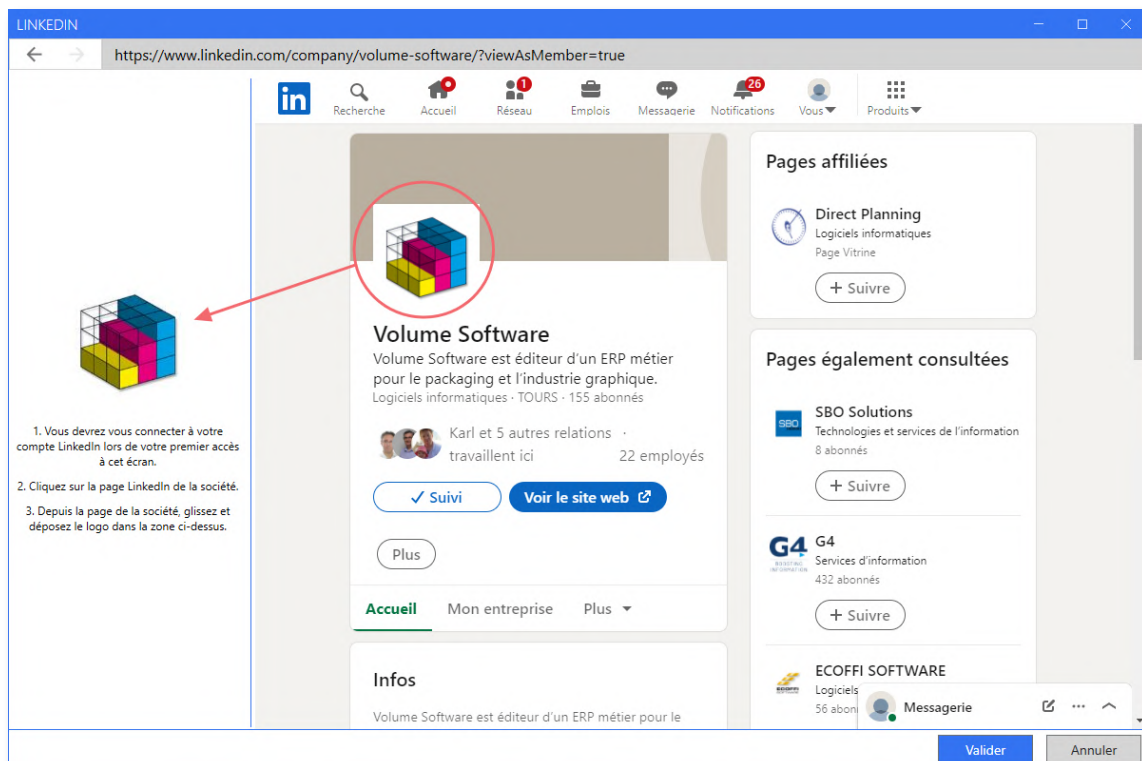
2. ReflexClient opens a **Web** page showing the **matches** found on LinkedIn for the current compa-



ny (you must have a LinkedIn account and sign in when using this feature for the first time)



- Click on the relevant company in the results, and **drag the company logo** to the grey area on the left:



Result: the company record now displays the company logo, and the associated LinkedIn address is automatically populated:

Dénomination sociale	VOLUME SOFTWARE				
Type de relation	Fournisseur	Code ERP			
Commercial 1	<non renseigné>	Groupe	Groupe		
Commercial 2	<non renseigné>	Mémo			
Commercial 3	<non renseigné>	Contact principal	<non renseigné> -		
Admin. des ventes	Ingrid Gountard				
Adresse	4 rue albert Dennerly		Secteur géo. ERP	Grand Ouest	
Géolocalisation niveau rue			Divisions administratives :		
Code postal	37000		Niveau 1 :	Centre-Val de Loire (24)	
Ville	TOURS		Niveau 2 :	Indre-et-Loire (37)	
Pays	France (FR)		Niveau 3 :	Arrondissement de Tours (372)	
Téléphone 1	+33 (0)2 47 66 47 20		<p>Graphique indisponible</p>		
Téléphone 2					
Fax	+33 (0)2 47 20 54 04				
Email	info@volume-software.com				
LinkedIn société	https://www.linkedin.com/company/volu				
Site web	http://www.volume-software.com				

Relationships

Relationships now display as lists, with the left menu giving you access to lists filtered by type of relationship:

SOCIÉTÉ - VOLUME SOFTWARE			
Société	Etalissements	Cubes	Groupe
Contacts	Opportunités	Notes	Rendez-vous
Tâches	Relations		
Toutes les relations	<div> Créer Modifier Supprimer Excel Filtres </div>		
Nos concurrents et partenaires			
Leurs concurrents et partenaires			
Détention de capital			
Autres relations			
Société A	Relation	Société B	Note
Hotel de l'Europe	Est un hôtel proche de	VOLUME SOFTWARE	
Grand Hôtel de Tours	Est un hôtel proche de	VOLUME SOFTWARE	
Asus France	Est fournisseur de	VOLUME SOFTWARE	
VOLUME SOFTWARE	Est fournisseur de	Cartonnages du Nord	

When creating/modifying a relationship, it is now possible to **attach a note to it**:



The **generic relationship "Has relationships with"** is now available for relationships other than those predefined, in which case the notes can be used to specify the type of relationship:





Other new features

- **Sales representatives** were moved and are now directly available in the General information menu of the company record

Commercial 1	Jeannine Chenin
Commercial 2	<non renseigné>
Commercial 3	<non renseigné>
Admin. des ventes	Christophe Denvers

- A button enables to quickly add the company to **favourites**

Dénomination sociale	ABC NORD	 
Type de relation	Client	
Code ERP	3313	



The facility record

The facility record was also redesigned, in line with the company record:

ETABLISSEMENT - ALCALIA TOURS

Etablissement

Contacts

Notes

Informations générales

Géolocalisation (Beta)

Nom de l'établissement

ALCALIA TOURS

Type d'établissement

Agence commerciale

Code ERP

2110

Contact ppal société

BAUDET Jean

Contact ppal établisst

SERVAT Marie

Adresse

15 rue du général de Gaulle

Secteur géo. ERP

Grand Ouest

Géolocalisation niveau rue

Etat / Province

Code postal

37000

Niveau 1 :

Centre-Val de Loire (24)

Ville

TOURS

Niveau 2 :

Indre-et-Loire (37)

Pays

France (FR)

Niveau 3 :

Arrondissement de Tours (372)

Téléphone 1

SIREN / SIRET

Téléphone 2

Mode de règlement

<non renseigné>

Fax

Echéance

<non renseigné>

Email

Effectif

ID #1018

Enregistrer

Annuler

The group record

The group record now displays the companies in the group to access them faster:

GROUPE - IMPRIMIT

Groupe

Contacts

Opportunités

Notes

Informations générales

Nom du groupe

IMPRIMIT

Site Web

Nombre de sites

7

Nationalité

Française

Nombre de salariés

Sociétés dans ce groupe

+ Créer

Modifier

Excel

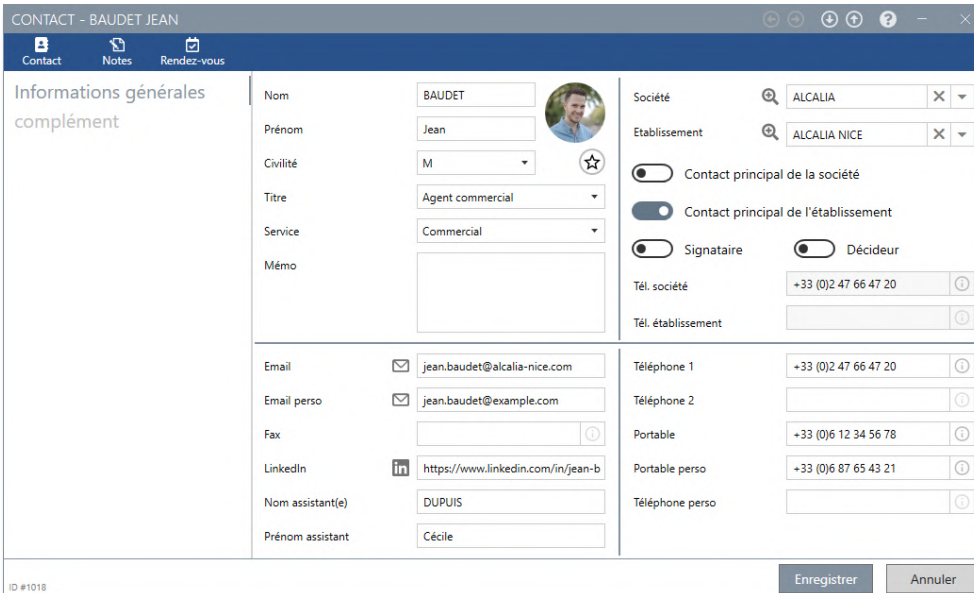
Filtres

Dénomination sociale	Type Relati	Potentiel	Dernier état	Sect.Activité	Secteur	Ville	CP
Baune Imprim	Client	3	Actif	Imprimerie	Grand Ouest	BAUNE	49140
CMRP	Client	3	Actif	Imprimerie	Grand Ouest	MONTARGIS	45200
Editions Faré	Client	2	Actif	Imprimerie	Grand Ouest	CHATEAU REI	45220
ImprimAll	Client	3	<non renseign	Imprimerie	<non renseign	ALFORTVILLE	94140
IMPRIMERIE JEAN-CLAUDE LELOUP	Client	3	Actif	Imprimerie	Grand Ouest	VILLEMANDE	45700
Imprimerie Lyonnaise	Client	4	<non renseign	Imprimerie	Grand Est	LYON 03	69003
Imprimerie Martineau	Client		<non renseign	Imprimerie	<non renseign	MELUN	77000

The upper band gives access to the contacts, opportunities and notes for all companies in the group.

The contact record

The contact record benefits from a **new design**, including a new LinkedIn field which allows, like for the company, to **finds contacts easily** on LinkedIn and **quickly add their profile picture**:



CONTACT - BAUDET JEAN

Informations générales complément

Nom: BAUDET, Prénom: Jean, Civilité: M, Titre: Agent commercial, Service: Commercial, Mémo: [empty]

Email: jean.baudet@alcalia-nice.com, Email perso: jean.baudet@example.com, Fax: [empty], LinkedIn: https://www.linkedin.com/in/jean-b

Nom assistant(e): DUPUIS, Prénom assistant: Cécile

Société: ALCALIA, Etablissement: ALCALIA NICE

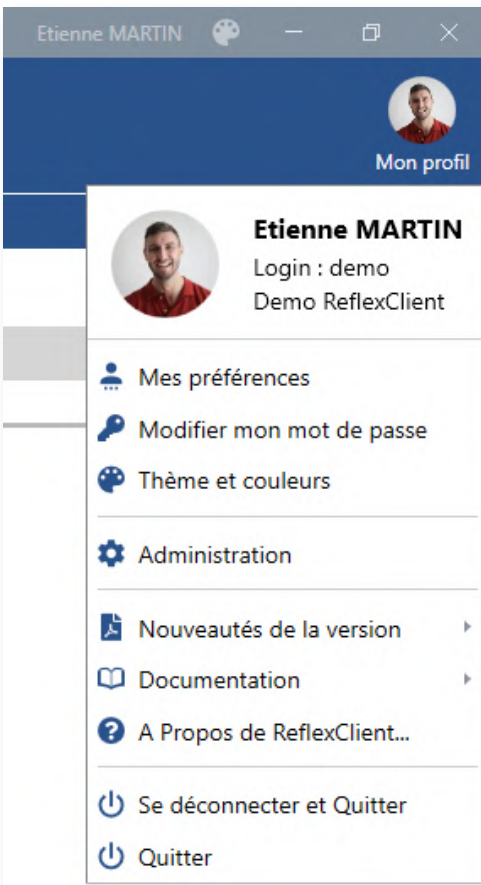
Contact principal de la société: [checked], Contact principal de l'établissement: [checked], Signataire: [unchecked], Décideur: [unchecked]

Tél. société: +33 (0)2 47 66 47 20, Tél. établissement: [empty]

Téléphone 1: +33 (0)2 47 66 47 20, Téléphone 2: [empty], Portable: +33 (0)6 12 34 56 78, Portable perso: +33 (0)6 87 65 43 21, Téléphone perso: [empty]

Enregistrer, Annuler

My profile



Etienne MARTIN

Mon profil

Etienne MARTIN
Login : demo
Demo ReflexClient

- Mes préférences
- Modifier mon mot de passe
- Thème et couleurs
- Administration
- Nouveautés de la version
- Documentation
- A Propos de ReflexClient...
- Se déconnecter et Quitter
- Quitter

In the top right corner of ReflexClient, the **user menu** was **rearranged** for better usability.

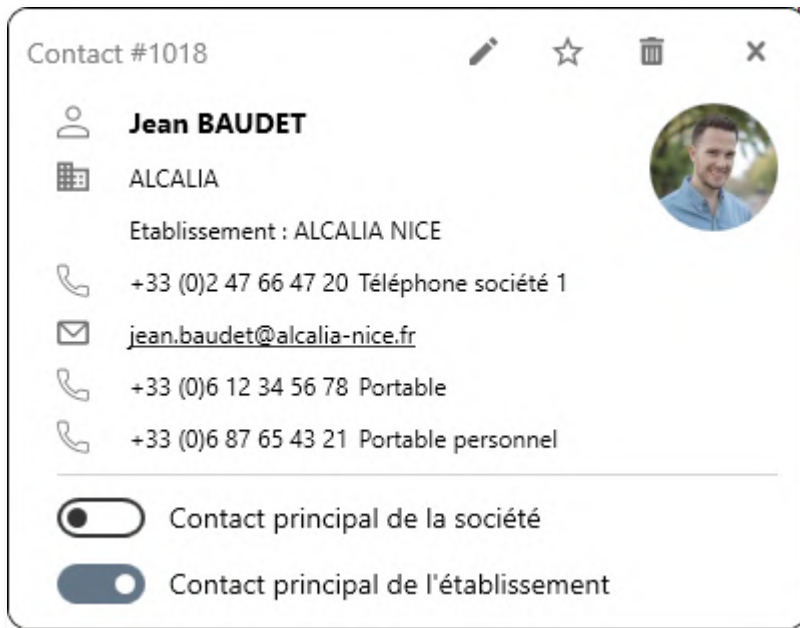
Submenus are grouped by topics:

- Personal options
- Administration
- Information about ReflexClient
- Login

Navigation

Contextual information

ReflexClient 4.3 includes **new contextual information windows** in contacts, companies, groups and opportunities lists.



The contextual information window above displays:

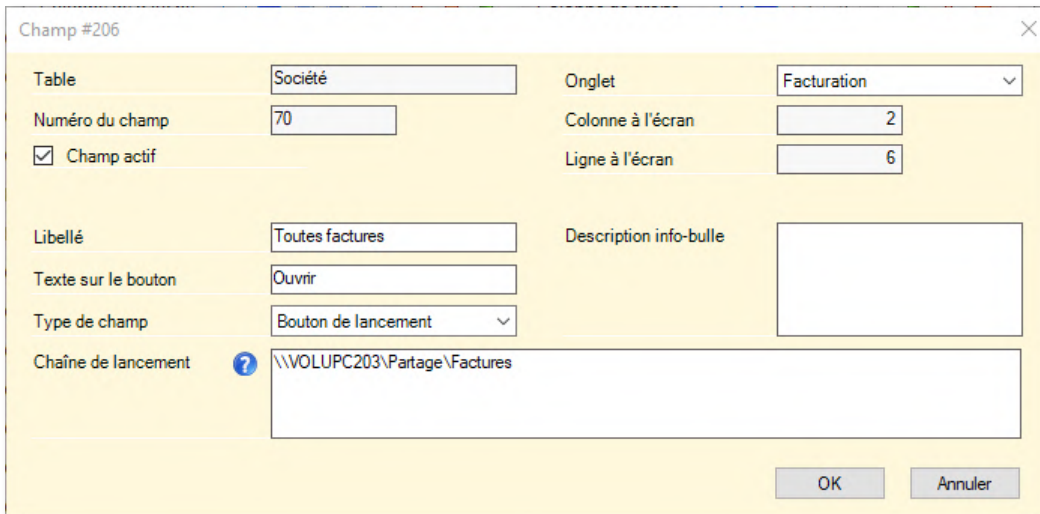
- **A summary of the information entered** on the contact record.
This dynamic window hides **automatically** any missing information.
- **Various quick actions** in the upper part (modify, add to favourites, delete) as well as a new button to set the contact as main contact of the company or facility, without having to open the contact record.

Buttons in custom tabs.

As a reminder, ReflexClient allows the administrator to create custom tabs and fields for company, contact and opportunity records. These tabs can now contain **custom buttons**, which can be used to open a **network folder** containing for example **the estimates or invoices of a customer**.

In the following example, the **Facturation** tab was previously created, for which we will create 2 buttons:

- The first to open a static folder, without variable

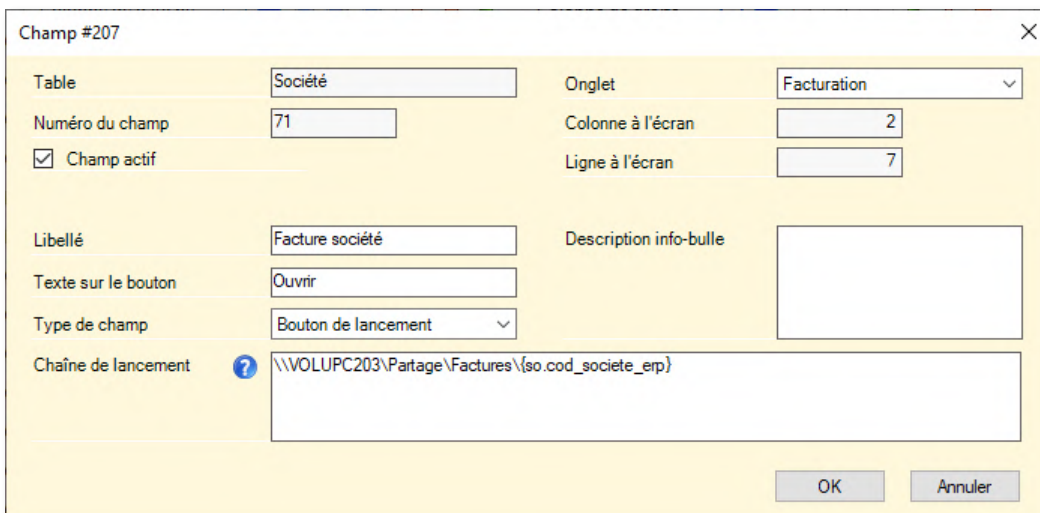


Champ #206

Table	Société	Onglet	Facturation
Numéro du champ	70	Colonne à l'écran	2
<input checked="" type="checkbox"/> Champ actif		Ligne à l'écran	6
Libellé	Toutes factures	Description info-bulle	
Texte sur le bouton	Ouvrir		
Type de champ	Bouton de lancement		
Chaîne de lancement	\\VOLUPC203\Partage\Factures		

OK Annuler

- The other, with a variable (the company code), in order to open a folder specific to the current company



Champ #207

Table	Société	Onglet	Facturation
Numéro du champ	71	Colonne à l'écran	2
<input checked="" type="checkbox"/> Champ actif		Ligne à l'écran	7
Libellé	Facture société	Description info-bulle	
Texte sur le bouton	Ouvrir		
Type de champ	Bouton de lancement		
Chaîne de lancement	\\VOLUPC203\Partage\Factures\{so.cod_societe_erp}		

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▲ Configuration of the button by the administrator

Notice the presence of a variable (company code) in the path to open ("Chaîne de lancement")

SOCIÉTÉ - ABC NORD

Société Etablissements Cubes Groupe Contacts Opportunités Notes Rendez-vous Tâches Relations

Informations générales
 Infos complémentaires
 Géolocalisation (Beta)
 Segmentation
 Potentiel client
 Satisfaction client
 Marketing
 Facturation

Général

Établissement bancaire: BDS Bank
 IBAN: FR12 345 678 9 1234 5678 9BC
 Devise: Euros
 Régime TVA: Intra-communautaire
 Cycle facturation: Mensuel

Gestion encours

☒ Client Autorisé
☐ Client Bloqué

Accès factures

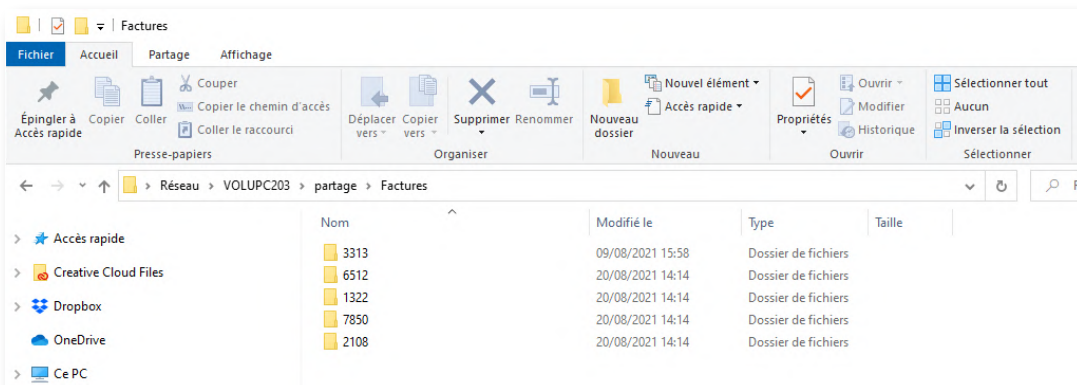
Toutes factures: [Ouvrir](#)
 Facture société: [Ouvrir](#)

Observations

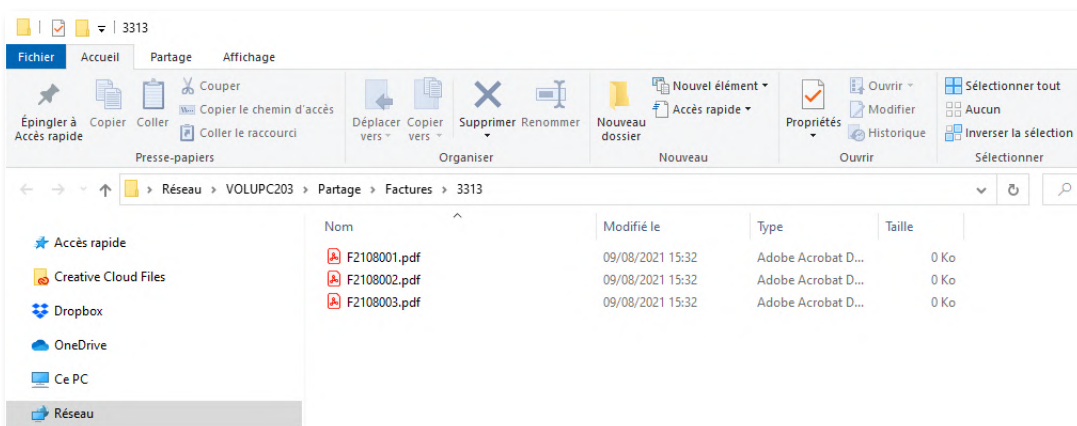
Notes: Pour toute question de facturation, contacter M. Leclec, CFO, au 0612345678

▲ Presence of custom buttons on the record of company "ABC Nord" whose company code is 3313

▼ Clicking on the first button opens the explorer in the folder containing all invoices

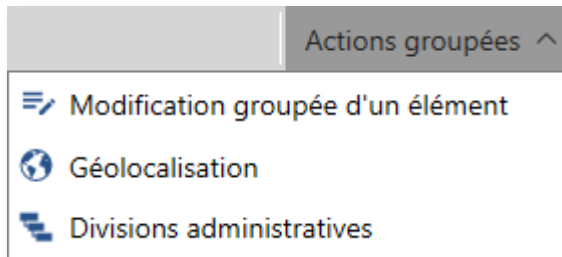


▼ Clicking on the second button opens folder "3313" containing all the invoices of the company



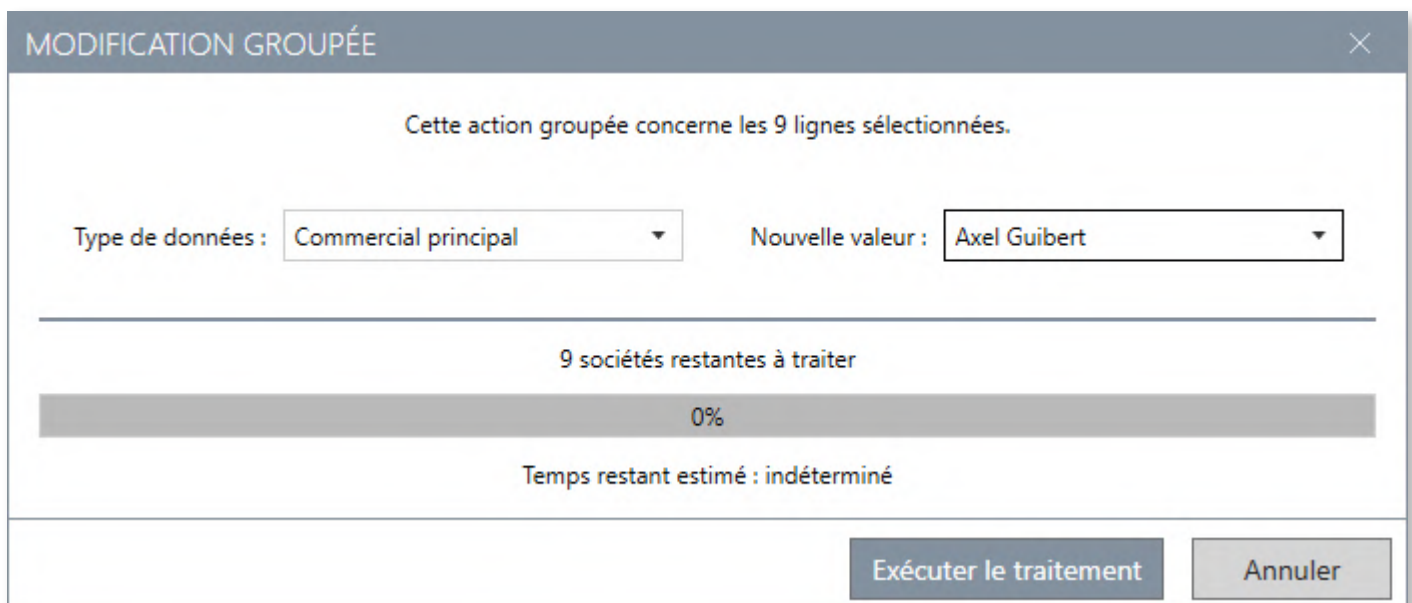
The grouped actions

In lists of companies, a new menu offers the ability to perform **batch modifications**, on a selection or all companies:



The **Grouped modification of an element** can be used to modify the :

- Main sales representative
- Sales administrator
- Last state
- Validity
- Category



▲ *Example of grouped action to change the main sales rep for 9 companies*

For this example, you can change the main sales representative:

- From lists created for each sales rep, by modifying the sales rep for the whole selected list.
- From a selection within a group of companies, using the standard selection tool (shift+click, ctrl+click, area selected with the mouse, keyboard).

The **Geolocation** action is a way to geolocate a group of companies, with the ability to **keep or overwrite the existing geolocation**, and the option to include the associated facilities:

GÉOLOCALISATION GROUPEE

Cette action groupée concerne les 10 lignes sélectionnées.

Supprimer toutes les géolocalisations existantes

Inclure les établissements

Nombre de sociétés sélectionnées :

10

Nombre de sociétés déjà géolocalisées :

7

Sociétés à géolocaliser :

3

Nombre d'établissements sélectionnés :

0

Nombre d'établissements déjà géolocalisés :

0

Nombre d'établissements à géolocaliser :

0

3 adresses restantes à géolocaliser

0%

Temps restant estimé : indéterminé

Lancer la géolocalisation

Annuler

▲ Above, 10 companies are selected, among which 7 are already geolocated.
The existing geolocation data are kept: 3 companies will therefore be geolocated.

Finally, the **Administrative divisions** action enables users to search and populate the administrative divisions for a group of companies with, as for the grouped geolocation, the option to overwrite the existing data:

DÉTERMINATION GROUPEE DES DIVISIONS ADMINISTRATIVES

Cette action groupée concerne les 11 lignes sélectionnées.

Déterminer uniquement les divisions administratives non renseignées

Nombre de sociétés sélectionnées :

11

Nombre de sociétés déjà déterminées :

10

Nombre de sociétés à déterminer :

1

Nombre d'établissements sélectionnés :

0

Nombre d'établissements déjà déterminés :

0

Nombre d'établissements à déterminer :

0

1 adresses restantes à déterminer

0%

Temps restant estimé : indéterminé

Lancer

Annuler

Cubes

New data are available for the following cubes

- **Orders cube:** Addition of the **Number of blanks of entity**
- **Invoices cube:** Addition of the **Number of blanks of entity**
- **Purchases cube:** Addition of the "ERP supplier group"