

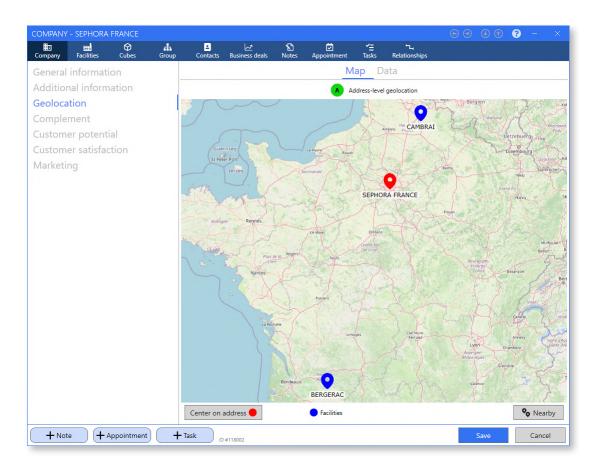
Reflex 4.7: New features

Volume Software is pleased to introduce Reflex version 4.7. This version brings new geolocation features as well as major evolutions regarding notes.

Reflex CRM

Geolocation

• In the company record, the geolocation map now also displays the facilities for this company:

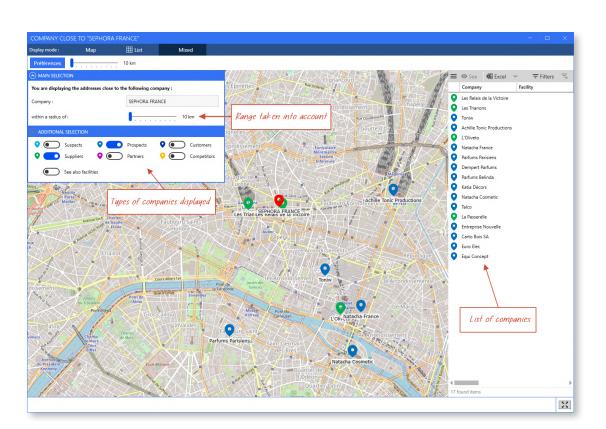


A new screen is available to get the list of companies and/or facilities close to the company (or facility).

The proximity distance can be customized, as well as the types of companies displayed (suspects, prospects, customers, suppliers, partners or competitors).

This screen offer a display as a "Map", as a "List" or in "Mixed mode" (below).





In the same fashion, it is now possible to get the list of companies within the same administrative division, like for example "Île-de-France (11)" or "Paris (75)".

Administrativ	ve division	S:	
Level 1:	∞	Île-de-France (11)	-
Level 2:	%	Paris (75)	
Level 3:	%	Paris	

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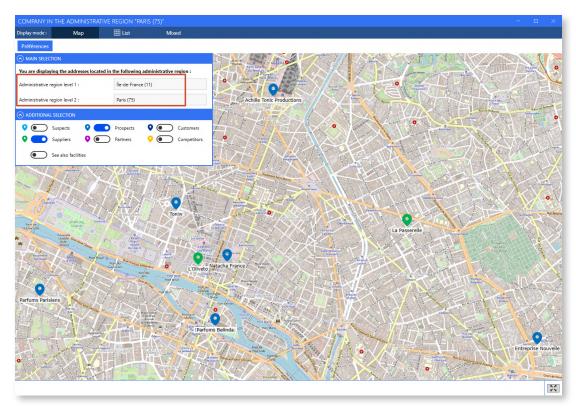
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Multiple evolutions regarding notes

• It is now possible to enter notes for appointments and tasks.

	SEPHORA FRANCE (Sephora)	× •	14	All day		
	Study for new Blue crystal perfume packaging			Planned on :	14	
	Business deal	-			14	
•	Study •			Deadline :	14	
	Objective of task (sent to your Outlook or Google agenda, if synchronization is enabled)			Assigned to :	MARTIN Etienne	×
				Created by :	MARTIN Etienne	
	Additional personal note (not sent to your Outlook or Google age	enda)				

Attachments can no longer be directly dropped on appointments and tasks.

If attachments assigned to appointments and tasks exist in your CRM, when updating to version 4.7, notes about these attachments will be automatically created on these attachments/tasks, with the



name of the attachment indicated in the title of the note:

_		0												
	Note on compar	ny Q	Sephora Fran	ice										
Т	>> Attachment	t: Visit report.doc												
•	Commercial information													
								х	6 8	Style	<u>A</u> \	B		
	>> Attachm	nent: Visit rep	ort.doc											
2	Attached files													(
P	Visit rep	wrtdoc MARTIN On 15/02	2/2023			I								Œ
	Visit rep Etienne	xort.doc MARTIN On 15/02		On	lun.	: 03/10/2011	15:15							Œ
	Visit rep Etienne	MARTIN Etier	ine		lun. mar.		15:15							Æ

- It is now easier to access all the notes about the current record:
 - From the "Business deal" record: in addition to the notes entered on the business deal, we can also view the ones entered on the appointments and tasks linked with this business deal:

BUSINESS D	EAL: 17-00	015-1 STANE	DARD CA							🕑 🕤 😗 –	\times
تيا Business deal	L Contacts	1 Notes	D Appointm	√ <u>=</u> ent Tasks							
Recent n		s than a y	/ear)	Created/modified b	y All users		•	Categor	y All categories	•	
All notes				= + Create	/ Modify	Delete	e Excel ~	,		, ∓ Filters	
				Modified by	Modified by	Note t	itle	Rec	About record	Atta	ch Cat.
				Ō 15/02/2023	MARTIN Etienr	ne M. Duf	our availability	~=	Task: Call Mr Dufour		\bigcirc

In the example above, we are on a business deal record and we are displaying the list of notes about this business deal. We can see that there is a note on a task associated with the business deal. In this case, the task is to call a contact and the note provides information about the availability of the contact to call.

- From the company record: in addition to the notes entered on the company, we can also view the ones entered on the group, business deals, contacts, appointments and tasks linked with this company.
- From the group record: in addition to the notes entered on the group, we can also view all the notes displayed for each company belonging to the group.
- From the contact record: in addition to the notes entered on the contact, we can also view the ones entered on the appointments taken with this contact.



• On the note input window, the header now displays the record to which the note is attached (company record, group record, business deal, etc.)

NOT	E ON BUSINESS DEAL		
2	Note on the business deal (0), for the company	17-00002-1 "Miracle" range Sephora France	
T	New range Commercial information	•	
			x 6 8
	Sephora launches the new Mra The <mark>Study dpt will need to ana</mark>		

The main "Notes" tab displays the lists of all notes entered in the CRM. It can now be used to display and filter the new notes on appointments and tasks:

•

						M100 - My recent notes 🛛 🗭		
Se	earch by note		\odot	My notes	Notes regarding me	⑦ Recently viewed ★ New record	rds	
=	+ Create 🖋 Mo	odify <u> </u> Delete	C ² View	related record	• Mark as read	Æ Excel ∨		
	Created on	Created by	Re	Record type	Legal name	About record	Category	Note title
	15/02/2023 11:21	MARTIN Etienne	₫	Appointment	VOLUME SOFTWARE	Appointment: 2023-02-15 Lunch with part	General information	Access plan
	15/02/2023 11:19	MARTIN Etienne	2	Business deal	Sephora France	Business deal: 17-00002 "Miracle" range	Commercial information	New range
	15/02/2023 11:13	MARTIN Etienne	~ ≡	Task	Transports du Marais	Task: Call Mr Dufour	General information	M. Dufour availability
	03/10/2011 15:15	MARTIN Etienne		Company	Sephora France	Company: Sephora France	Commercial information	>> Attachment: Visit report.doc
	11/12/2018 11:03	MARTIN Etienne		Company	Sephora France	Company: Sephora France	Technical information	Check compatibility with their new IS
	27/02/2012 09:42	MARTIN Etienne	III:	Company	Sephora France	Company: Sephora France	General information	Commercial offer sent by mail

From this screen, you can now quickly create a note on a company. This will require to enter the attached company.



NOT	E ON COMPAN	(
	Note on company	Volume Software		×	
Т	Title				
٠	General information	n	• 🔾		
8					202

- \triangle In the list, a double click allows to open the note and the "View related record" button can be used to open the record which is related to the note.
- \triangle A word entered in the search bar is now also search within the body of notes and still also in their title.

Quick action buttons

Quick action buttons were added in numerous windows of the application to:

- Create a contextual note
- Create an appointment
- Create a job

Example on the contact record:

Contact Company contacts	Notes Ap	pointment					
General information		Name		ALIX	Company 0	Stanford Groupe	×
omplement		First Name		Raphael	Facility	R Facility	-
		Title		Mr • 😭	Main company c	ontact	
		Title		Purchaser •	Main facility cont		
		Service		Purchase •			
		Memo		Buyer since 2005	Signer	Decision maker	
					Company phone	+33 (0)2 47 66 47 20	
					Facility phone		
		Email		raphael.alix@example.com	Telephone 1	+33 (0)3 18 88 51 37	G
		Personal email			Telephone 2		
		Fax		+33 (0)3 18 88 51 97 🔅	Cell		
		LinkedIn	in		Personal cell		
		Assistant Last name			Personal phone		
		Assistant First name					





Import of companies

This new module allows to import in Reflex a list of suspects originating from a third party system. For this, the program uses a very specific Excel format (contact us for more information). It is also possible to import a main contact, configurable fields ("meta" fields) and a note.

Sociétés	Groupes	Contacts	Affaires	Notes	Rendez	-	Tâches A	bsences	Annonces		
es de listes	+								T010 - Mes s	ociétés - demo 🗹	
		Recherche pa	r dénomination	sociale	\odot	1 0	Mes sociétés	☆ Fav	voris 🗌 Ō Récemmen	t consultés 📃 🛠 N	louveautés
- demo		≡ + Créer	🖋 Modifie	er 🕅 Su	pprimer	☆M	arquer comme	e favori	Actions groupées 🗡	Marquer comme	lu 🕮 Excel
on .		Imprime	r			Potentiel	Type Relation	Code ERP	Groupe	Commercial 1	Suivi Affaire
entreprise						5	Client	2009	SEPHORA	Georges Abayllie	Pascal Rimbault
:iétés		帕 Importer	depuis Excel			4	Client	C02557	<non renseigné=""></non>	Etienne Martin	Alice Bigard
ts		VOLUME S	OFTWARE			4	Fournisseur		<non renseigné=""></non>	<non renseigné=""></non>	Ingrid Gountard
ects et prospects		LAPEYRE				4	Client	1034	<non renseigné=""></non>	Tania Haubert	Fiona Blier
nisseurs		INNODEC				ч	Client	140	<non renseigné=""></non>	Etienne Martin	Fiona Blier
		YVES ROC	HER			4	Client	2956	<non renseigné=""></non>	Georges Abayllie	Pascal Rimbault
		ASUS FRAI	NCE			ч	Client	3244	<non renseigné=""></non>	Caroline Benedict	Caroline Bellevue
		ELECTRO-I	MAT			3	Client	1035	EURO ELEC	Caroline Benedict	Christelle Sandré
		CONFISER	IE LEONIDAS			3	Client	270	GROUPEMENT DES CON	Georges Abayllie	Fiona Blier
		IMPRIMER	IE JEAN-CLAUD	E LELOUP		3	Client	3008	IMPRIM'IT	Jeannine Chenin	Christelle Sandré
		PROGISCA	D			2	Client	980	<non renseigné=""></non>	Tania Haubert	Nicolas Paulin

Others

• The group record benefits from a new "memo" field in the group details record.

						•••	• •		×
Group Contacts Business deals Notes									
General information	Group name	CARTOBOX					L		
	Memo								
	Website			Number of	sites	15			
	Nationality	French	•	Number of	employees				
			Companie	es in this group)				
	= + Create / Mo	odify 🕮 Excel	~				ŦFi	-	
							- F H	iters	^
	Company name		ship Potential	Last status	Area acti.1	Area	Town	CP	^
	Company name Caisserie de Varinfroy	Relation	ship Potential	Last status Active	Area acti.1 Cardboardinc				-
		Relation	ship Potential r 3	Active	Cardboarding		Town VARINFROY	СР	-
	Caisserie de Varinfroy	Relation	ship Potential r 3 r r 3	Active <not entered<="" td=""><td>Cardboarding</td><td>North <not entered<="" td=""><td>Town VARINFROY</td><td>CP 60890 59980</td><td>-</td></not></td></not>	Cardboarding	North <not entered<="" td=""><td>Town VARINFROY</td><td>CP 60890 59980</td><td>-</td></not>	Town VARINFROY	CP 60890 59980	-
	Caisserie de Varinfroy Carto France	Relation Custome Custome Custome	ship Potential r 3 r r 3 r 3	Active <not entered<br=""><not entered<="" td=""><td>Cardboarding Cardboarding Cardboarding</td><td>North <not entered<="" td=""><td>Town VARINFROY MAUROIS LES GOUDES</td><td>CP 60890 59980</td><td>-</td></not></td></not></not>	Cardboarding Cardboarding Cardboarding	North <not entered<="" td=""><td>Town VARINFROY MAUROIS LES GOUDES</td><td>CP 60890 59980</td><td>-</td></not>	Town VARINFROY MAUROIS LES GOUDES	CP 60890 59980	-
	Caisserie de Varinfroy Carto France CartoBox	Relation Custome Custome Custome tonde Custome	ship Potential r 3 r r 3 r 3	Active <not entered<br=""><not entered<="" td=""><td>Cardboarding Cardboarding Cardboarding</td><td>North <not entered<br="">South <not entered<="" td=""><td>Town VARINFROY MAUROIS LES GOUDES</td><td>CP 60890 59980 13008</td><td>-</td></not></not></td></not></not>	Cardboarding Cardboarding Cardboarding	North <not entered<br="">South <not entered<="" td=""><td>Town VARINFROY MAUROIS LES GOUDES</td><td>CP 60890 59980 13008</td><td>-</td></not></not>	Town VARINFROY MAUROIS LES GOUDES	CP 60890 59980 13008	-
	Caisserie de Varinfroy Carto France CartoBox Cartonnages de la Rot Cartonnages Mulliez R Emball 95	Relation Custome Custome Custome tonde Custome Richebé Custome Custome	ship Potential r 3 r 3 r 3 r 3 r 3	Active <not entered<br=""><not entered<br=""><not entered<br="">Active</not></not></not>	Cardboarding Cardboarding Cardboarding Cardboarding Cardboarding	North <not entered<br="">South <not entered<="" td=""><td>Town VARINFROY MAUROIS LES GOUDES AUTRECHE CHERENG</td><td>CP 60890 59980 13008 37110 59152 95000</td><td></td></not></not>	Town VARINFROY MAUROIS LES GOUDES AUTRECHE CHERENG	CP 60890 59980 13008 37110 59152 95000	
	Caisserie de Varinfroy Carto France CartoBox Cartonnages de la Rot Cartonnages Mulliez R	Relation Custome Custome Custome tonde Custome Richebé Custome Custome	ship Potential r 3 r 3 r 3 r 3 r 3 r 3	Active <not entered<br=""><not entered<br=""><not entered<br="">Active <not entered<="" td=""><td>Cardboarding Cardboarding Cardboarding Cardboarding Cardboarding Cardboarding</td><td>North <not entered<br="">South <not entered<br="">North</not></not></td><td>Town VARINFROY MAUROIS LES GOUDES AUTRECHE CHERENG VAUREAL</td><td>CP 60890 59980 13008 37110 59152 95000</td><td></td></not></not></not></not>	Cardboarding Cardboarding Cardboarding Cardboarding Cardboarding Cardboarding	North <not entered<br="">South <not entered<br="">North</not></not>	Town VARINFROY MAUROIS LES GOUDES AUTRECHE CHERENG VAUREAL	CP 60890 59980 13008 37110 59152 95000	
	Caisserie de Varinfroy Carto France CartoBox Cartonnages de la Rot Cartonnages Mulliez R Emball 95	Relation Custome Custome Custome tonde Custome Richebé Custome Custome	ship Potential r 3 r 3 r 3 r 3 r 3 r 3	Active <not entered<br=""><not entered<br=""><not entered<br="">Active <not entered<="" td=""><td>Cardboarding Cardboarding Cardboarding Cardboarding Cardboarding Cardboarding</td><td>North <not entered<br="">South <not entered<br="">North <not entered<="" td=""><td>Town VARINFROY MAUROIS LES GOUDES AUTRECHE CHERENG VAUREAL</td><td>CP 60890 59980 13008 37110 59152 95000</td><td>-</td></not></not></not></td></not></not></not></not>	Cardboarding Cardboarding Cardboarding Cardboarding Cardboarding Cardboarding	North <not entered<br="">South <not entered<br="">North <not entered<="" td=""><td>Town VARINFROY MAUROIS LES GOUDES AUTRECHE CHERENG VAUREAL</td><td>CP 60890 59980 13008 37110 59152 95000</td><td>-</td></not></not></not>	Town VARINFROY MAUROIS LES GOUDES AUTRECHE CHERENG VAUREAL	CP 60890 59980 13008 37110 59152 95000	-



In the "Column selector" window, used in the lists when adding a column or in the filters when adding a fields which we want to filter on, the new "search" field allows to find quickly a column based on its name:

		〒 Filters 🐨 Columns
СР	Town	Column selector $ imes$
59100	ROUBAIX	
91560	CROSNE	Sales X 🖸
75010	PARIS	🔺 🔚 Company
92352	LE PLESSIS	✓ Sales person 1
44110	SOUDAN	Sales person 2
94140	ALFORTVI	Sales person 3 Customer satisfaction
95500	LE THILLA	
58000	NEVERS	Availability of sales rep
77420	CHAMPS	

.

The appointment record underwent a number of visual rearrangements. Among other improvements, the business deal field is more visible in the appointment header. A new "Notes" tab is now available:

APPOINTMENT		0 -	×
Appointment Notes			
Created/modified by All users 👻	Category All categories	•	
≡ + Create 🖋 Modify 📋 Delete 🖷 Excel 🗸		∓ Filters	
Modified by Modified by Note title	Rec About record	Attach	n Cat.
Ö 15/02/2023 MARTIN Etienne Access plan	Appointment: 2023-02-15 Partner lunch		\bigcirc

• The task record also underwent a number of visual rearrangements. Like on the appointment record, a new "Notes" tab is now available:

TASK	9 - ×
Task Notes	
Created/modified by All users	Category All categories
≡ + Create 🖌 Modify 💼 Delete 🖷 Excel ∨	∓ Filters ¯,
Modified by Modified by Note title	Rec: About record Attach Cat.
O 15/02/2023 MARTIN Etienne Study validation	Task: Prototype to make

• The designations of the "potential" levels can now be configured.



Reflex Cubes

• In the Orders cube, we added the following data : "First delivery date", "Last delivery date" and "Number of deliveries".