

Reflex 4.7: New features

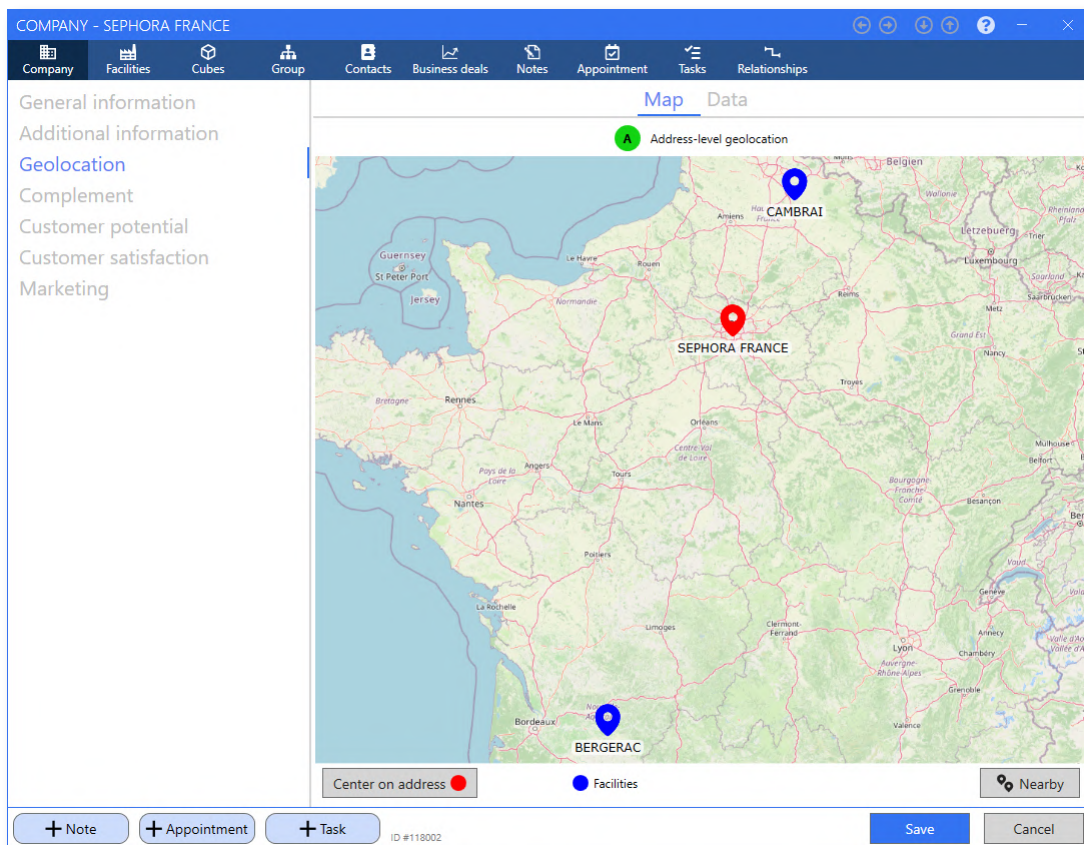
Volume Software is pleased to introduce Reflex version 4.7.

This version brings new geolocation features as well as major evolutions regarding notes.

Reflex CRM

Geolocation

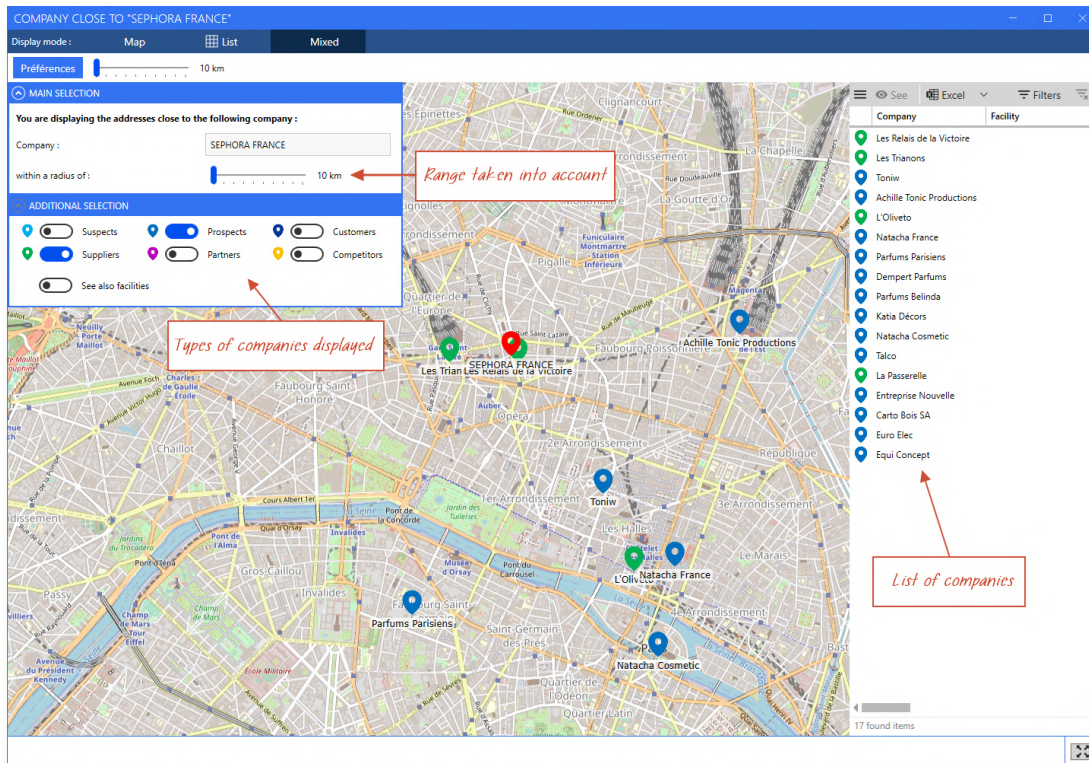
- In the company record, the geolocation map now also displays the facilities for this company:



- 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).



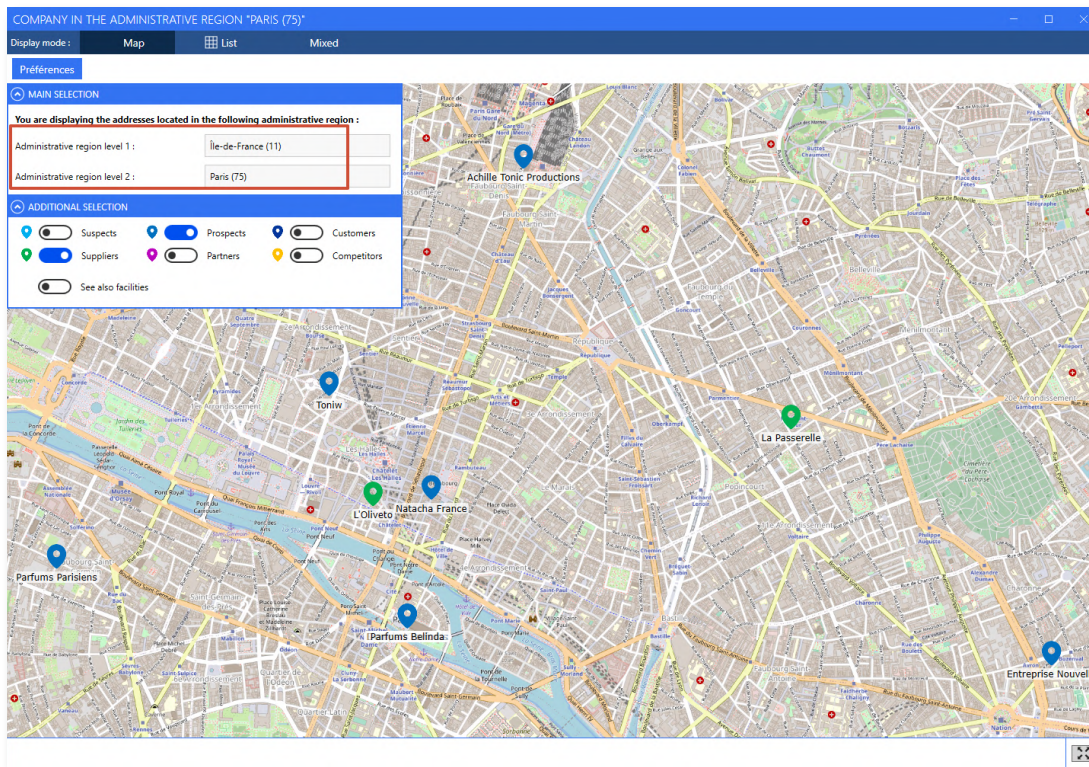
- In the same fashion, it is now possible to get the list of companies within the same administrative division, like for example "Île-de-France (11)" or "Paris (75)".

Administrative divisions:

Level 1:

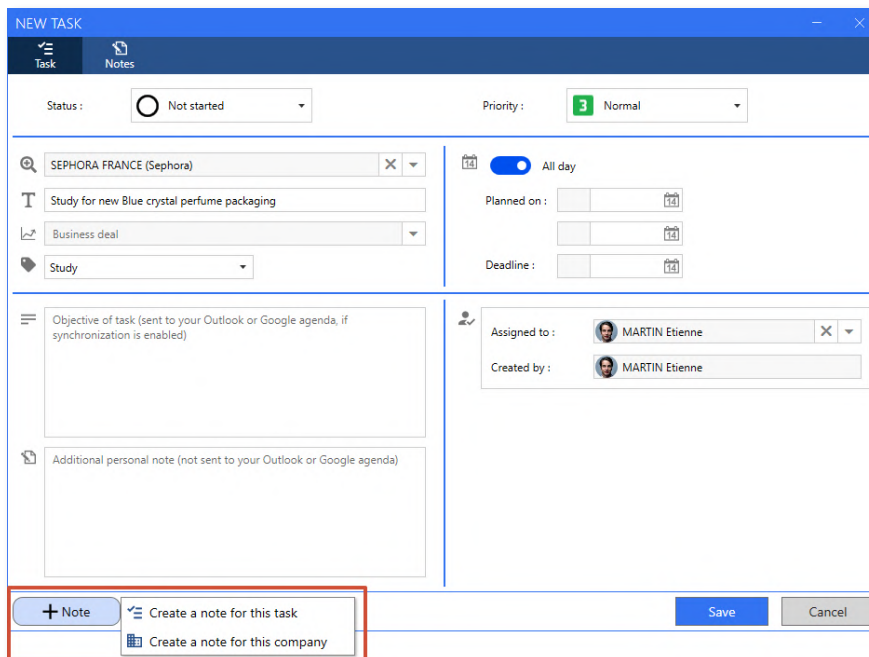
Level 2:

Level 3:



Multiple evolutions regarding notes

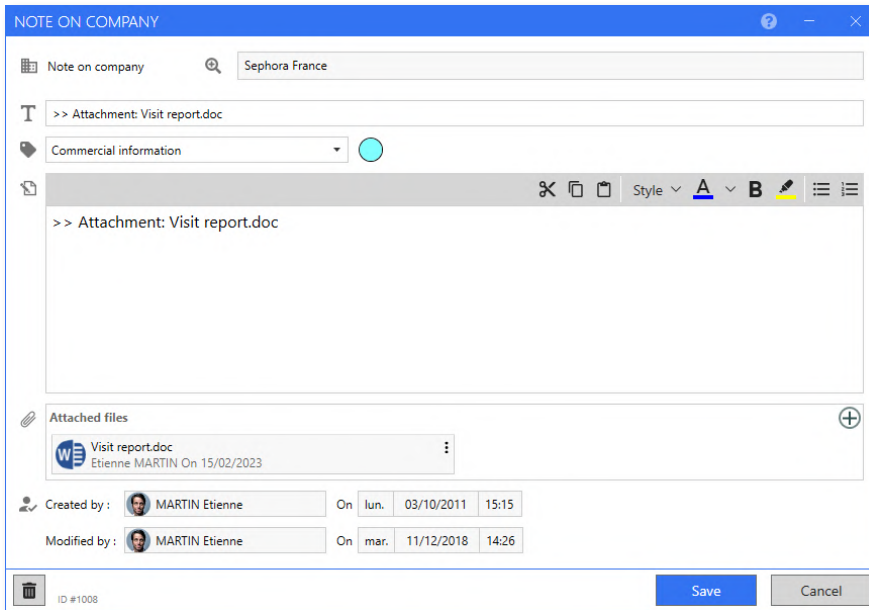
- It is now possible to enter notes for appointments and tasks.



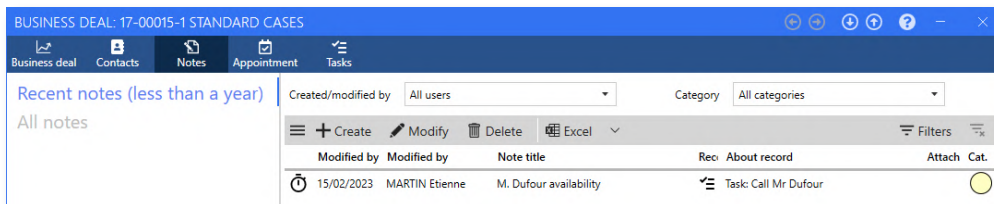
Attachments can no longer be directly dropped on appointments and tasks.

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:



- 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:





Created/modified by	Category	Created	Modified by	Note title	Rec	Attach	Cat.
15/02/2023	MARTIN Etienne	M. Dufour availability	Task: Call Mr Dufour				

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.)

NOTE ON BUSINESS DEAL


Note on the business deal


17-00002-1 "Miracle" range


for the company





Sephora France

T

New range


Commercial information




Sephora launches the new Mracle range.
The Study dpt will need to analyze the requirements


- 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 


Search by note.....


☐ My notes
☐ Notes regarding me
☐ Recently viewed
☐ * New records





 Create


 Modify







 Delete

 View related record

 Mark as read

 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		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		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.

NOTE ON COMPANY

Note on company ✕ ▼

T

General information ▼ ●

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- △ 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.
- △ 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 - ALIX RAPHAEL

General information
complement

Name 

First Name

Title ★

Title

Service

Memo

Company ✕ ▼

Facility ▼

☒ Main company contact

☐ Main facility contact

☒ Signer ☒ Decision maker


Company phone 📞

Facility phone 📞

Email ☒

Personal email

Fax 📞

LinkedIn 

Assistant Last name

Assistant First name

Telephone 1 📞

Telephone 2 📞

Cell 📞

Personal cell 📞

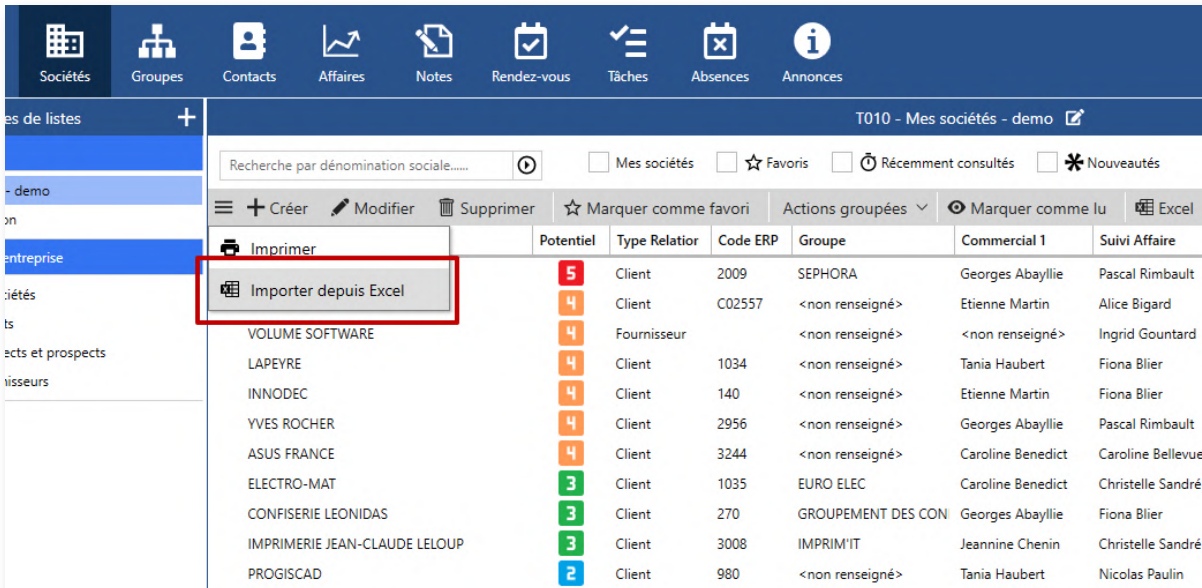
Personal phone 📞

+ Note + Appointment + Task Save Cancel

ID #61002

Import of companies

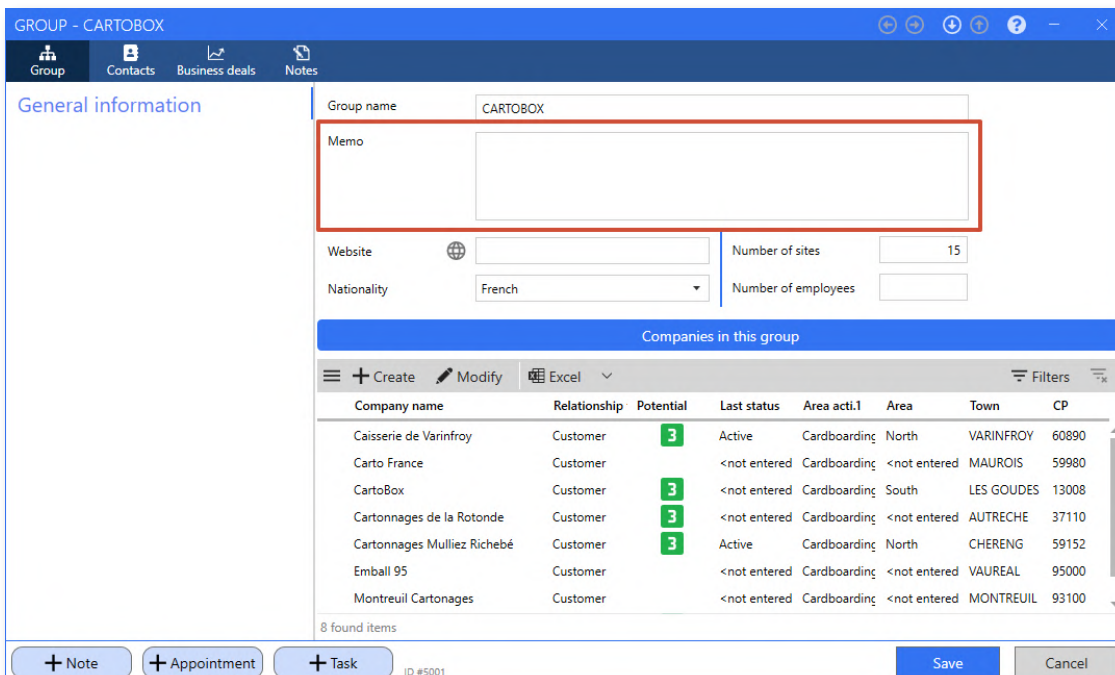
This new module allows to import in Reflex a list of suspects originating from a third party system. For this, the program uses a very specific Excel format (contact us for more information). It is also possible to import a main contact, configurable fields ("meta" fields) and a note.



Potentiel	Type Relation	Code ERP	Groupe	Commercial 1	Suivi Affaire
5	Client	2009	SEPHORA	Georges Abayllie	Pascal Rimbault
4	Client	C02557	<non renseigné>	Etienne Martin	Alice Bigard
4	Fournisseur		<non renseigné>	<non renseigné>	Ingrid Gountard
4	Client	1034	<non renseigné>	Tania Haubert	Fiona Blier
4	Client	140	<non renseigné>	Etienne Martin	Fiona Blier
4	Client	2956	<non renseigné>	Georges Abayllie	Pascal Rimbault
4	Client	3244	<non renseigné>	Caroline Benedict	Caroline Bellevue
3	Client	1035	EURO ELEC	Caroline Benedict	Christelle Sandré
3	Client	270	GROUPEMENT DES CON	Georges Abayllie	Fiona Blier
3	Client	3008	IMPRIM'IT	Jeannine Chenin	Christelle Sandré
2	Client	980	<non renseigné>	Tania Haubert	Nicolas Paulin

Others

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



Group name: CARTOBOX

Memo: [Redacted]

Website: [Redacted] Number of sites: 15

Nationality: French Number of employees: [Redacted]

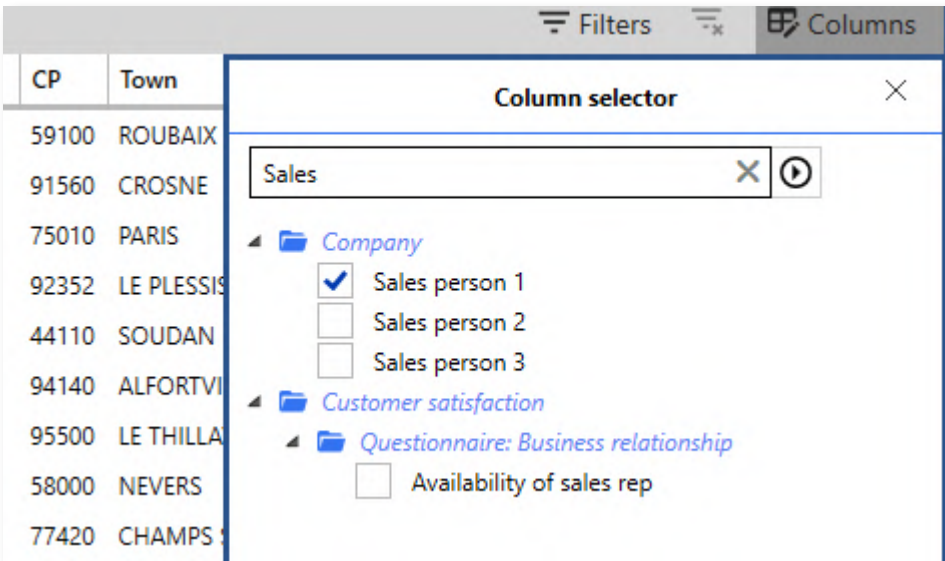
Companies in this group

Company name	Relationship	Potentiel	Last status	Area acti.1	Area	Town	CP
Caisserie de Varinfroy	Customer	3	Active	Cardboarding	North	VARINFROY	60890
Carto France	Customer		<not entered>	Cardboarding	<not entered>	MAUROIS	59980
CartoBox	Customer	3	<not entered>	Cardboarding	South	LES GOODES	13008
Cartonnages de la Rotonde	Customer	3	<not entered>	Cardboarding	<not entered>	AUTRECHE	37110
Cartonnages Mulliez Richebè	Customer	3	Active	Cardboarding	North	CHERENG	59152
Emball 95	Customer		<not entered>	Cardboarding	<not entered>	VAUREAL	95000
Montreuil Cartonages	Customer		<not entered>	Cardboarding	<not entered>	MONTREUIL	93100

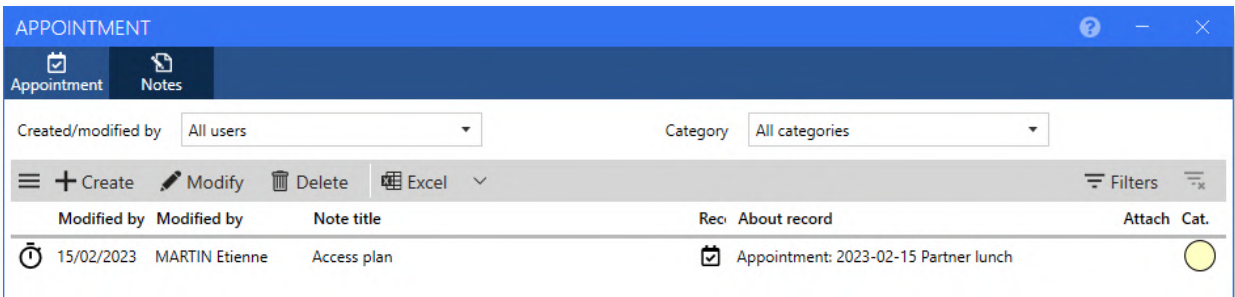
8 found items

+ Note + Appointment + Task ID #5001 Save Cancel

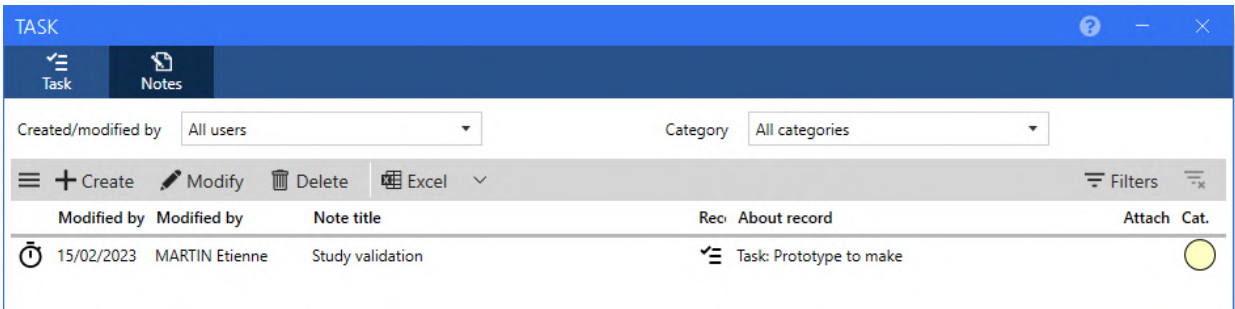
- In the "Column selector" window, used in the lists when adding a column or in the filters when adding a fields which we want to filter on, the new "search" field allows to find quickly a column based on its name:



- 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:



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



- 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".