Update News

Release 2024.3

Brainformatik GmbH

2024-07-17

NEXT

CHAPTER

ONE

VERSION 2024.6

Release Date: from 2024-08-06

If you have any questions about the update, please don't hesitate to contact us.

Note: Note: This version also includes the CRM version 2024.4, 2024.5

Legende ⊕ New ⊗ Updated ✓ Fixed

1.1 General

⊕ Transfer of referenced records for emails

⊕ If an email is replied to, all references from the source email are automatically copied to the reply

⊕ If an email is forwarded, the user can decide whether the references from the source email should be copied

⊕ In both cases, references from the recipient modules are ignored (Contacts, Organisations, Leads, Partners, Vendors), as these are created via the recipients of the new email

1.2 Module PDF Templates

⊕ The percentage of the advance can be used as a variable in the "Part payment invoices" block

1.3 Technical changes

⊗ The "Refresh folder" setting has been removed from the email accounts

CHAPTER

TWO

VERSION 2024.3

Release Date: from 2024-05-14

If you have any questions about the update, please don't hesitate to contact us.

Note: Note: This version also includes the CRM version 2024.1, 2024.2

Legende New Updated Fixed

2.1 Email communication for tickets combined with the customer portal

Previously, email notifications for tickets were only sent if a contact had active customer portal access

- This was automatically the case as soon as a ticket was created by the customer via the customer portal
- It was also the case when a ticket was created in the CRM and linked to a contact

From now on, email communication is no longer dependent on active customer portal access

- To activate email communication combined with tickets, there is a new central setting option under the global settings
- In the CRM configurator in the Customer portal tab, there is a checkbox 'Activate ticket emails'
- The checkbox is automatically activated with the delivery of this update as long as at least one contact with portal access exists in your system

This change applies to internal and external email communication

2.2 General

References can be created between the "Emails" and "Timesheet" modules via "More information"

When editing text areas by double clicking (with or without HTML editor), the action must be completed by clicking Save or Cancel. Clicking outside the input area no longer has any effect.

2.3 Attachment in customer portal

- It is now possible to add attachments directly when creating the ticket
- Attachments can be added when creating comments on existing tickets
- In CRM, attachments are referenced to the ticket as documents when it is created, as before. Attachments for comments are displayed directly in the comment both in the portal and in the CRM.

2.4 Add-ons “Contingents” und “Time tracking”

- A function for billing timesheets has been added
- This action is located in the list view of the “Timesheet” module and can be executed after selecting the timesheets to be billed
- In all modules that have a reference to timesheets, a corresponding action for billing has also been added in the detail view
- Details on the exact billing and the associated function can be found in our manual

2.5 DATEV Add-ons

- To support multiple clients, a screen for entering the advisor and client number opens before a long-term token is requested
- The mask is prefilled with the information from the add-on settings

2.6 Technical changes

- The settings of running cron jobs can no longer be changed
- The “modified” field is only updated if a field in the data record has actually changed
- Birthday appointments
  - Past birthdays (which remain in the system up to one month before the next year’s appointment is created) are set to “completed” status
  - Workflows can be defined for creation of and changes to birthday appointments

CHAPTER

THREE

VERSION 2023.12

Release Date: from 2024-02-20

If you have any questions about the update, please don't hesitate to contact us.

Note: Note: This version also includes the CRM version 2023.10, 2023.11

Legende New Updated Fixed

3.1 General

Email marketing: Responses to unsubscribes can be configured for CleverReach. These can be found under the configuration of attributes and can be defined individually for each recipient list.

Add-on "Zugferd": Mandatory information according to the specification has been added

Emails: If emails are imported into the system or sent from the system and are linked to contacts, these emails are also automatically linked to the respective main account of the corresponding contacts

3.2 Modules Appointments/Tasks

The configuration of sharing rules regarding records assigned to groups has been changed

Previously, appointments/tasks assigned to groups were shared as soon as a user from this group created sharing rule

From now on, sharing rules for appointments/tasks assigned to groups must be explicitly created for users

The new configuration can be found under groups settings in the global settings

3.3 DATEV authentication

A pop-up for "Access key management" has been added under "My settings" in the "Interfaces" tab. Long-term and short-term tokens can be requested there for all activated data services

- Short-term tokens are valid for 11 hours
- Long-term tokens are valid for 2 years and must be requested for a specific dataset. It is therefore necessary to enter "Consultant number" and "Client number" in the add-on settings in advance.

The tokens from the access key management are used when executing the "DATEV invoice data service 1.0" or "DATEV booking data service" actions

If no token is stored in the "Access key management" for the called data service, a short-term token can be requested directly when executing the action

Extended checks are now carried out before the selected data service is executed, e.g. the financial year, G/L account number length, activated account books and authorizations are checked for interfaces

3.4 Technical changes

Default values for user-defined views are taken into account in the mobile view

DATEV add-on: The invoice data service allows the use of total discounts

When copying or converting inventory records like invoices, no items can be copied whose base product/service has already been deleted

Tickets created via the mail scanner have the ticket source "Email"

The currently installed version of CRM+ including the link to the respective changes can be found on the left in the footer of the system

CHAPTER

FOUR

VERSION 2023.9

Release Date: from 2023-10-24

If you have any questions about the update, please don't hesitate to contact us.

Note: Note: This version also includes the CRM version 2023.7, 2023.8

Legende ⊕ New ⊛ Updated ✓ Fixed

4.1 General

⊛ Blocks can be collapsed in create/edit views. The display of blocks (collapsed, expanded) set via the layout editor now also affects this.

4.2 Add-on "DocuSign"

⊕ The reason for a rejection is transferred to the CRM via the interface and stored there.

4.3 New Add-on "Digital assistant"

⊕ Assistant based on ChatGPT

⊕ Available in several places

- Detail view of accounts, partners, vendors => questions about the company can be answered
- Quick creation of contacts/leads and transfer of information into fields of the record possible
- Editor => help with text formulations
- User menu (top right) => For general ChatGPT requests

4.4 Technical changes

Add-on "Time tracking": In the add-on settings, the assignment of the number field was reset, it must therefore be reassigned. This was necessary because a rigid determination was previously made here, regardless of the configuration of the field.

CHAPTER

FIVE

VERSION 2023.6

Release Date: from 2023-08-08

If you have any questions about the update, please don't hesitate to contact us.

Note: Note: This version also includes the CRM version 2023.4, 2023.5

Legende New Updated Fixed

5.1 General

If the connection to the Exchange Connector is used for sending emails, the default setting for "Collective email" can now also be specified for this under "My settings → Interfaces".

For the "Timesheets" module, a field for the number of a timesheet has been added analogously to all other modules.

For the "Email Marketing" module, a new action has been added to react to unsubscribes and bounces.

5.2 Swiss QR-Code

Templates with QR invoices with payment part and receipt can now be created in PDF templates.

The payment part contains the Swiss QR Code, mandatory from October 2022, which contains all relevant information for invoicing and payment.

5.3 Add-on "DocuSign"

Multiple users can authenticate themselves to DocuSign via "My Settings".

For each module, you can then set which user should serve as the sender of documents in the add-on configuration.

For PDF templates, a placeholder for the initials of the person signing the document can now be inserted in the same way as for the signature field.

5.4 New Add-on "Brevo"

For the Email Marketing module, the connection to the provider "Brevo" is now available. Prerequisite is the booking of this new add-on.

The scope of functions is similar to the provider Mailchimp. More details can be found in the help area.

5.5 New Add-on "SalesViewer"

The provider "SalesViewer" identifies anonymous website visitors and transfers the newly acquired information via API to the modules "Website Visits" and "MQL".

The new module "MQL" (Marketing Qualified Lead) shows all website visitors and passes additional information like address, LinkedIn url and Xing address.

In the new module "Website Visits" all website visits are listed with duration and their interests.

GDPR standard is met, as no cookies or other personal data is collected.

5.6 Technical changes

The reference fields configured by the user when creating appointments/tasks now also appear in the mask for quick creation of a record of these modules.

Delayed workflow tasks can now also be configured in minute increments.

Reports allow filtering on "greater than (or equal to)" and "less than (or equal to)" for text fields. This makes it easier to implement alphabetical filters in particular.

If a record with personal data (modules Contacts, Leads) is finally deleted from the CRM system via the cleanup of the recycle bin, the change tracking is also anonymized accordingly from now on. This behavior is always active regardless of the GDPR add-on.

- The tracked changes have also been retroactively cleaned up for all previous cases in the course of this update.

Booked invoices can no longer be edited via workflow or via one of the APIs as of now. Exceptions are fields that can be changed via the interface even after booking.

CHAPTER

SIX

VERSION 2023.3

Release Date: from 2023-05-09

If you have any questions about the update, please don't hesitate to contact us.

Note: Note: This version also includes the CRM version 2023.1, 2023.2

Legende ⊕ New ⊗ Updated ✓ Fixed

6.1 General

⊕ The list view of users (admin area) has been extended with the information of the last successful login.

⊕ For the REST interface, the ability to create app passwords once two-factor authentication is active for a user has been integrated.

⊕ If two-factor authentication is activated for a user, the user will immediately be shown a backup code that can be used if the second factor is lost.

⊕ For users with two-factor authentication already active, it can be disabled and re-enabled to get the backup code as well.

⊗ In the CRM calendar view, appointments that have or have not been carried out are displayed with a corresponding icon.

⊗ When composing a new e-mail, the user can decide in the future whether the e-mail should be saved as a record in CRM. If an email is replied to from the CRM mailbox without linking it in advance, this setting is deselected by default.

⊗ When composing a new e-mail, several internal CRM documents can now be selected as attachments at once.

⊗ In the "Suppliers" module the action "CSV update" has been added.

⊗ If an e-mail was referenced with attachments from the mailbox, it is possible to link individual attachments as a document to referenced records.

⊗ From now on, duplicates can be marked in list views and merged directly without having to perform a separate search first.

⊗ In e-mail mailboxes, complete folders can be emptied by right-clicking on the respective folder. Emptying takes place in the background and can take some time depending on the number of e-mails.

⊗ The export options for the Reports and Report Sets module (PDF, CSV, PPTX and Print) can now be authorized per profile. This setting applies to exports from the detail view and sending a report by e-mail.

For workflow tasks of the type "Send e-mail" it is now possible to select upload fields whose files will then be sent with the e-mail.

6.2 Kanban-View

In all modules, Kanban settings can be made for existing and new views. Kanban boards can be used to quickly move data sets between different values.

A selection list can be chosen as the basis for the paths of these views.

The values of the selection list can then be configured and displayed as paths.

It is also possible to configure the fields that are displayed on individual cards.

6.3 Add-ons for DATEV

New "Payment type" field in incoming invoices

New block in the supplier "Vendor number by payment type" to be able to store different vendor numbers depending on the payment type.

6.4 Add-on "DocuSign"

As soon as DocuSign is active and a linked document with DocuSign envelope is found for a data record, the information of the envelope is from now on also displayed in a separate block of the data record.

In workflows, there is now the execution condition "Once, once DocuSign envelope has been signed." to be able to update the data record accordingly when it is signed.

6.5 Add-on "Microsoft Teams"

Through the connection to Microsoft Teams, appointments can be created quickly and easily with Teams Meeting.

After activating the add-on, users who want to use this feature must authenticate separately for the Teams interface under "My Settings → Interfaces".

If a new appointment is created in CRM, the checkbox "Teams Meeting" can be selected. If the appointment is then synchronized with Exchange, the data for the Teams Meeting is transferred to the description.

If information was entered manually in the description field, the teams information will be appended below their own description.

6.6 Add-on "Visit reports"

For the visit reports, the actions "CSV Export", "CSV Import" and "CSV Update" have been added.

6.7 Technical Changes

Both the comment block in the detail/edit view and the comment widget initially show only 20 main comments with associated sub-comments. If you scroll further down, the list expands dynamically.

The widget for the overview of all comments optionally offers the possibility to deactivate the HTML display of the comments. This speeds up the loading time of this widget and thus of the complete dataset.

For the "Zugferd/ X Invoice" add-on, the links to the manual have been added.

The "Contingents" add-on now includes a standard PDF template for generating an overview. This has been added automatically if the add-on is already active in your system.

If a field update workflow task is created that is to update a field of type "date & time", the function "get_date (with time)" can now be used to set the current time as well.

When creating a PDF template, formatting can be changed for all number, currency and percentage fields, regardless of the placeholder used.

Information

The fields for "Inform owner" as well as workflows attached to them have been removed as announced!

CHAPTER

SEVEN

VERSION 2022.12

Release Date: 2023-02-14

If you have any questions about the update, please don't hesitate to contact us.

Note: Note: This version also includes the CRM version 2022.10, 2022.11

Legende ⊕ New ◈ Updated ✔ Fixed

7.1 General

⊕ Copying of list views possible

⊕ Actions for converting a project into a timesheet can be created via the layout editor.

⊕ Besides the TOTP based 2-facotr login, a WebAuthn based second factor (Yubikey, Windows Hello) is now also possible. Note that this method is not supported in the mobile view.

◈ For booked invoices, it is still possible to change the referenced contact. This is especially important for master subscription invoices.

◈ In the Activities Overview widget, the ability to open the email preview has been added.

◈ An appointment can be marked as "not accomplished" via the detail view using a corresponding action.

◈ In PDF templates for billing modules, in which asset items can be stored in positions, all fields of the asset item in positions can now be selected.

◈ Comments can be inserted in the edit view. In addition, the input of comment content has been switched to an HTML editor.

◈ For the display of incoming callers, vendors are now also searched.

7.2 Workspaces

⊕ Configured workspaces can be changed in the navigation menu on the right side. Default is "All".

⊕ Under Global Settings → Navigation Menu Tabs you can disable the use of workspaces.

◈ If the workspace is changed from "All" to another area, this is now highlighted more clearly.

7.3 Workflows

New workflows can now also be created from the edit view of an existing workflow.

A list of the configured tasks can be opened directly from the list view for each workflow.

- All tasks can be de-/activated at once
- Individual tasks can be de-/activated
- Individual tasks can be edited or deleted

The number of all configured workflows is displayed in the list.

The list view shows how many workflows are configured per module.

The last selected module of the list view is saved for the duration of the active session.

7.4 Add-ons

Visit reports: Comments are possible

DATEV Booking data service: From now on, accrued dunning fees will be transferred in the month in which they accrue. In this case, the last invoice document is used for the transfer.

7.5 Technical changes

Important note

From now on, when using the customer portal for your clients, your own imprint and privacy policy must be configured as URLs. As admin enter them accordingly under Global Settings → CRM Configurator → Customer Portal. This change is necessary because your customers are in a business relationship with you, not with Brainformatik GmbH.

Information

The field “Notify owner” and related functions will be completely removed from the modules “Partners”, “Contacts” and “Accounts” with the next version 2023.3 in the middle of the year. Until then, make sure to use suitable alternatives. Records can be recommended or subscribed to, as well as notifications for comments can be selected. If you have your own workflows on these check boxes, we recommend creating new fields, and switching workflows to them.

The radius search is now only available with configured geo-data server.

Speed of handling billing records has been improved. This affects detail and edit views as well as PDF export.

CHAPTER

EIGHT

VERSION 2022.9

Release Date: 2022-10-26

If you have any questions about the update, please don't hesitate to contact us.

Note: Note: This version also includes the CRM version 2022.7, 2022.8

Legende New Updated Fixed

8.1 General

Actions can now be created to convert purchase orders to incoming invoices.

At "Global Settings → Currency Settings" you can enter different decimal and thousand seperators for all currencies except the system currency (usually Euro), which is then available for PDF export.

8.2 Customer Portal

At "Global Settings → CRM Configurator → Customer Portal", you can set new guidelines for passwords. This includes the length as well as the occurrence of numbers, capital letters and special characters.

Furthermore, two-factor authentication can now also be activated for portal users. This is either optional but can also be enforced for all accounts.

From now on the portal password has to be changed after the first login. Affected are new accounts and also existing ones in case the password is reset.

8.3 Technical Changes

"Create final invoice" action in sales order is editable via Layout Editor. This makes it possible to configure the target view and assignment of user-defined fields. This has no effect on basic fields.

If the "internal file" of a document is sent via action "Send email", the file name is used for the attachment instead of the title of the document.

Dialogs for selecting users are sorted by user names and no longer by the user IDs.

Attachments added to global system email templates are taken into account when the corresponding messages are sent.

Note: Subject to change without notice!

CHAPTER

NINE

VERSION 2022.6

Release Date: 2022-08-09

If you have any questions about the update, please don't hesitate to contact us."

Note: Note: This version also includes the CRM version 2022.4, 2022.5

Legende ⊕ New ⊛ Updated ✔ Fixed

9.1 General

⊕ The Notepad widget is now available in the dashboards of all modules.

⊛ If an OAuth token (e.g. used by the Exchange connection) can no longer be renewed, the user will now receive a notification in CRM+ with appropriate notes.

⊛ If a user changes the sort order in a list view, it is now applied immediately after saving.

9.2 ZUGFeRD

⊕ The ZUGFeRD add-on comes together with the e-invoice type X-Rechnung.

⊕ UGFeRD and X-Rechnung can be configured individually for the Invoice, Cancellation, Credit and Incoming Invoice modules.

- In the modules Invoice, Cancellation and Credit the export is available as a new action in the detail view for both formats.
- Import for both formats is integrated in the Incoming Invoice module. The action can be invoked from the list view and allows importing multiple documents in one step.

⊕ For taxes, invoice types, units of measure and payment types, the respective standardized codes can be customized.

⊕ ZUGFeRD invoices are created in the ISO standard PDF/A-3. The X-Rechnung export creates an XML file.

⊕ Individual PDF templates for ZUGFeRD modules can be created in the PDF Templates Plus module.

9.3 DATEV

The new action “DATEV booking data export” is provided in the list view and upgrades the functionality of the addon. Data is generated in DATEV format (DATEV CSV).

The DATEV transfer (Rechnungsdatenservice 1.0 and Buchungsdatenservice) can now be canceled at the client selection step.

9.4 E-Mail Marketing

Selection lists and reference fields can now be correctly passed to providers as attributes.

9.5 Optional Fields for Product and Service Items

The possibilities for creating optional fields in product and service items have been extended to include the following:

- Reference field
- Checkbox
- Multi-selection list

9.6 Technical Changes

In the LDAP settings, the “Host as account suffix” checkbox was introduced to control the domain name as a suffix of the user name.

The “Email Header” block in the Emails module has been fixed to be able to guarantee a consistent layout.

Note: Subject to change without notice!

CHAPTER

TEN

VERSION 2022.3

Veröffentlichungsdatum: 2022-05-10

If you have any questions about the update, please don't hesitate to contact us."

Note: Note: This version also includes the CRM version 2022.2

Legende ⊕ New ⊛ Updated ✔ Fixed

10.1 General

⊕ Actions for converting emails into tickets can be created

⊛ Transfer of information when converting an order confirmation into a delivery bill improved.

⊕ Added "Weight in kg" field in the Products module.

- To activate the underlying processes, an administrative user has to show the hidden field "Total weight position" in the global settings under Billing - Product block.
- In all billing modules there is an additional field "Total weight all positions" which must be shown in custom edit views via the layout editor, if necessary.
- Subsequently, the weight of the position is calculated from the quantity and weight of the product and all positions are added to the total weight.

10.2 Record deletion

⊛ The function for mass deletion of records is now executed in the background.

⊕ When deleting individual records, it is possible to have references deleted as well.

- The configuration for this can be found in the global settings under the item "Assign module settings".
- By default, the function is deactivated, but it can be activated per module either as a user selection or always.

10.3 DATEV

Field “Cost center” has been changed to a pick list.

Debitor and creditor numbers can be assigned automatically.

The “DATEV Export” action has been changed from “Invoice data file” format to the more modern “Document record data file” format, which is also applied to “Invoice data service 1.0” action. The usage of the action is unchanged.

10.4 Technical Changes

In reports, date fields now have filters for “older than 180/365 days”.

User-defined fields can now be created for the “FAQ” module.

In the “Emails” module, the creation of user-defined reference fields is no longer possible.

Note: Subject to change without notice!

CHAPTER

ELEVEN

VERSION 2022.1

Release Date: 2022-03-14

If you have any questions about the update, please don't hesitate to contact us."

Legende New Updated Fixed

11.1 Add-on "DATEV"

"DATEV booking data service" has been newly integrated.

- Customers will receive a newsletter with the relevant detailed information.
- A video tutorial on how to use it is provided.

"DATEVconnect online" has been removed and will finally be replaced by "DATEV invoice data service 1.0".

Note: Subject to change without notice!

CHAPTER

TWELVE

VERSION 2021.13

Release Date: 2022-02-14

If you have any questions about the update, please don't hesitate to contact us."

Note: Note: This version also includes the CRM version 2021.12

Legende New Updated Fixed

12.1 General

The Visit Reports module is now available in Mobile View.

The message center shows when a message has arrived.

12.2 New add-on "Time Tracking"

The new add-on Time Tracking is released!

- It can be connected per user to the services of Clockodo (https://www.clockodo.com/de/).
- Depending on the settings, either accounts or contacts can be transferred as customers to Clockodo.
- In addition, services and projects can also be synchronized from CRM+ to Clockodo.
- Times recorded in Clockodo, including the existing links, are created as time sheets in CRM+.

12.3 Technical Changes

When a sales order is created from a quote, the change of the quote status to "accepted" is now tracked. It is now also possible to configure workflows for this change.

It is no longer possible to create revision-safe file upload fields in the modules Products and Services, as the previous behavior was not intended.

Workflows with time delay are no longer executed if the underlying date field is empty.

Note: Subject to change without notice!

CHAPTER

THIRTEEN

VERSION 2021.11

Release Date: 2021-11-23

If you have any questions about the update, please don't hesitate to contact us."

Note: This version includes 2021.10

Legende ⊕ New ⊗ Updated ✔ Fixed

13.1 New development of Email accounts

⊕ Complete redevelopment and re-design of the module "Email accounts".

⊕ Communication for Office 365 accounts is now carried out via the API (interface) to Microsoft. To convert existing mailboxes, it is sufficient to re-authenticate in the respective mailbox settings.

⊕ Office 365 accounts that are connected via the API now support signalling of incoming messages. This can be activated via the mailbox settings.

⊕ Folders can be added to the favorites via drag & drop.

⊕ E-mails can be moved to folders via drag & drop.

⊕ Several emails can be marked with the Ctrl or Cmd key (Windows/Linux or Mac). Actions can then be carried out for these e-mails or they can be moved all at once.

⊕ A right-click in the email list opens a context menu that provides various actions depending on the selection.

⊕ Actions can be used to filter emails in the open folder according to certain criteria.

⊕ When mass linking emails, "additional references" can be set directly.

⊕ New options when creating an email include sending emails with a time delay and inserting attachments via drag & drop.

⊕ When selecting documents as attachments, a file preview is available for various file types.

⊕ The list preview for emails now shows all information, not just the content as before.

13.2 Extensions advance invoices/final invoice

New block “Billing” available in sales orders. This block contains information about already settled totals of the order.

The action for creating an advance invoice is now configurable via the layout editor.

When creating an advance invoice from the sales order, a check is now performed to avoid billing more than 100%.

New action “Create final invoice” to be able to create a final invoice directly from an order (previously not available).

Restructuring of the block for advance invoices including new information in the invoices module. Both in the detail/edit view and in PDF templates in the block for advance invoices.

13.3 New add-on “Contingents”

The new add-on for the Contingents module is now available!

- The new add-on is mainly used to get an overview of open or executed contingents. The Contingents module is linked to the existing Timesheets module.
- Existing contingents are reduced as soon as a timesheet is linked to the contingent and the status in the timesheet has been set to “executed”. With additional workflows that can be configured for the module, the billing department, for example, can also be informed that a contingent is “completed” and can be settled. Other application purposes can also be covered. Please contact us.

13.4 Technical changes

The standard setting for sending emails as “collective email” has been moved from “My preferences” to the respective mailbox. The previous setting has been transferred to the mailboxes.

For mail scanners that are connected via Google Mail OAuth, the folders must be reconfigured because communication now takes place via the API instead of IMAP.

Danger: These mail scanners have been set to inactive by the update to avoid errors.

All users who have configured a Sipgate account have to reconfigure it in “My preferences”. The XML-RPC interface is deactivated by Sipgate, thus the modern REST interface is now being used. This requires authentication via OAuth 2.

- All affected users will be informed about this via CRM notification.

The action “Create advance Invoice” has been removed from the module Quotes.

The action “create ticket” from an e-mail is no longer available due to the rebuild of the e-mail module is no longer available.

Note: Subject to change without notice!

CHAPTER

FOURTEEN

VERSION 2021.9

Release Date: 2021-09-28

If you have any questions about the update, please don't hesitate to contact us."

Note: This version includes 2021.8

Legende New Updated Fixed

14.1 Module PDF templates Plus

Placeholder Conditions

- In the detail view of a template, a text description of the set condition is displayed when the mouse is moved over it.
- Symbols can now also be inserted through conditions.

PDF templates can be marked as mail merge templates for the Campaigns module.

- When selecting templates for normal PDF exports, mail merge templates are no longer available for selection.
- For mail merge exports, normal templates are no longer available for selection.
- Mail merge templates do not allow "more information" blocks.
- Normal templates do not allow blocks for serial letters.

In the list and detail view, the user and time for the last change are now displayed. In addition, the list view is sorted alphabetically by the name of the templates.

Templates can be deactivated, which means they are no longer available for selection during export.

Formatting of date and number fields per field possible.

Ability to create QR codes using the barcode type placeholder. You can select vCard information, vCalendar information or any text content depending on the field type.

Added the possibility of embedded forms in PDF templates.

Templates can be marked as default by the user via the export dialog (popup). The standard thus applies per user and module.

If placeholders of the "more information" of a data set are used and the respective block is empty, the area can be hidden from the template as long as tables are used.

14.2 Module Appointments

If the field “Notification by e-mail” is subsequently changed, invitations are now also sent to users.

Group appointments for groups that do not have their own colour definition appear in the colour of the appointment type, if configured.

Invitations to users sent by mail now contain an attachment in order to be able to quickly insert the appointment into the calendar.

Display of main and invitation appointments has been combined in some widgets.

Changes to planning view:

- Now also possible for month view.
- The last set state (view, selected users and groups) is now permanently saved.

As soon as a day has been selected when creating an appointment, an overview of all appointments of this day appears.

Participants are now also visible in the appointments of invited users.

Opening of the complete create view from the quick create screen is possible.

A warning appears if appointments overlap with existing appointments during creation.

New button to insert the signature from “my settings” or a private e-mail template into the description.

When copying an appointment, invitees and attachments (if exist) are copied.

Attachments can be shared with invited users.

In a CRM appointment invitation, there is an icon next to Start/End to display the calendar of that day.

Start and end can be changed via quick edit.

An extended pre-filtering has been added for the selection of certain reference combinations, e.g. contacts are also pre-filtered for partners or leads for a selected partner.

Connected CalDAV calendars can already be selected in the mask of the quick creation.

Adding documents (file upload) is now included in the creation screen.

14.3 Module Tasks

Now there is the possibility to create recurring tasks. These tasks are currently excluded from Exchange synchronisation.

Start and end can be changed via quick edit.

An extended pre-filtering has been added for the selection of certain reference combinations, e.g. contacts are also pre-filtered for partners or leads for a selected partner.

Connected CalDAV calendars can already be selected in the mask of the quick creation.

Adding documents (file upload) is now included in the creation screen.

Note: Subject to change without notice!

CHAPTER

FIFTEEN

VERSION 2021.7

Release Date: 2021-08-03

If you have any questions about the update, please don't hesitate to contact us."

Note: This version includes 2021.6

Legende ⊕ New ◈ Updated ✓ Fixed

15.1 General

⊕ Tabs on the "Home-Dashboard" can now be moved by drag & drop.

15.2 Security

⊕ A 2-factor authentication is available, which can be activated for each user via ""My Settings". This requires, for example the Google Authenticator app or similar programmes/devices that support the TOTP standard.

Note: Cannot be combined with add-on "MS Azure AD via OAuth", as activation of 2-factor authentication is possible here independently of the CRM.

⊕ Under the global settings in the CRM configurator, additional criteria for the strength of a password can be defined in the tab "Security".

15.3 New add-on "module Delivery Notes"

⊕ The new ad-on for the delivery notes module is now available!

- Simple creation of the delivery note from an order as a partial or complete delivery via a conversion dialogue.
- An invoice can be created directly from a delivery note via a corresponding function.
- The extended warehouse management can be activated via the settings in the module manager of the module. This means that stock levels of products are calculated directly via the delivery note, no longer via the invoices.

- The settings can also be used to configure the behaviour of the new module. These include the default setting of complete deliveries, the behaviour for partial deliveries and the possibility to deactivate a direct discount.

Note: Subject to change without notice!

CHAPTER

SIXTEEN

VERSION 2021.5

Release Date: 2021-06-08

If you have any questions about the update, please don't hesitate to contact us."

Note: This version includes 2021.4

Legende ⊕ New ◈ Updated ✔ Fixed

16.1 General

⊕ With this version it will be possible to create new field types via Layout Editor (references, text area with HTML formatting, file upload, user selection).

- Reference fields can be used to create links to other modules. For example, in the module Tickets a new reference field to the module Accounts.
- New CK editor fields can be created.
- Existing fields of type text area, can be converted as CK editor field with HTML formatting.
- File uploads can be restricted to certain types and can also be configured as multi-uploads.

⊕ Extension of reference fields by the possibilities of auto-completion and quick create.

⊕ In record selection pop-ups, it is possible to filter on recently viewed records.

⊕ Non-role-bound pick lists allow the creation of new values directly during data record creation (permission via profiles available).

⊕ The validation of data records is now carried out on the complete mask and therefore no longer consecutively per field.

⊕ Quick editing of all types possible.

⊕ Quick editing possible in many other places, e.g. "More information" or in the global search results.

⊕ If a references to Accounts exists in a module and at least one is selected, pop-ups for record selection of Contacts are now pre-filtered system-wide to the selected accounts.

◈ The CSV import/update/export has been extended to include multilingual fields.

16.2 Inventory/line items

Button to jump to the basic settings of a inventory record was added. This appears as soon as one scrolls further down in the product block.

The checkbox to mark an item of a potential as a forecast item has been moved to the left to the other actions of an item.

A price book can be selected for an account. If positions are inserted into a product block, prices from the price book stored for the account are loaded preferentially.

In the modules Potential and Quote, positions from the selection pop-up can be inserted directly as optional positions.

16.3 Global settings

The setting item “Product block” in the “Billing” block has been activated for superusers.

16.4 Add-on “DATEV”

The global setting item “General ledger accounts” has been added. Here it is possible to maintain the G/L accounts to be used in CRM.

In the invoices, another invoice document can now be added. The fields are now called “original invoice document” and “last invoice document”.

If the DATEV add-on is active, the checkbox “use as booking document” is automatically activated when exporting PDF templates.

In the accounts it is now possible to maintain the (DATEV) customer number via the new field “Customer number”. Congruent to this, the field “Vendor number” has been added to the vendors.

New fields for the “DATEV G/L account” and the “Cost centre” have been added in the products and services modules.

The newly added fields (see above) are now transferred both during DATEV export and via DATEVconnect online.

Note: the DATEV export now generates several (month-specific) ZIP files. As before, these can simply be transferred with DATEV Belegtransfer.

Note: Subject to change without notice!

CHAPTER

SEVENTEEN

VERSION 2021.3

Release Date: 2021-04-13

If you have any questions about the update, please don't hesitate to contact us."

Legende New Updated Fixed

17.1 Product block

The new item groups for the product block could be defined statically. With this update it is possible to enter an individual value by simply entering it in the field of the item groups. The individual entry is only valid for the current data record.

17.2 Module PDF Templates Plus

In the PDF template editor, blocks for item groups can be filtered according to the designations. This allows layouts to be designed depending on the different product blocks.

17.3 New add-on "MS Azure AD via OAuth"

The add-on allows you to make the CRM login process even more secure by using the security features of the Microsoft account. The function allows CRM users to log in to the CRM+ system with an existing MS Azure Active Directory account. If a user is already logged in to the Microsoft portal, the browser-interal single sign-on process can be used. The CRM+ system can be used without any further user query. For more information, plese contact us via ticket or per e-mail.

Note: Subject to change without notice!

CHAPTER

EIGHTEEN

VERSION 2021.1

Release Date: 2021-02-16

If you have any questions about the update, please don't hesitate to contact us.

Note: This version includes 2020.13

Legende ⊕ New ⊗ Updated ✓ Fixed

18.1 New product block

⊕ Multilangual fields for the modules "Products" and "Services" can now be configured via the layout editor.

⊕ Default values for currency, language, basic discount and tax settings can be defined for accounts.

⊕ It is now possible to create multiple article list blocks.

⊕ Individual items can now be marked as "optional".

⊕ It is now possible to insert alternative items for an item.

⊕ For product bundles, the quantity of added products can be configured.

⊕ Move individual positions or entire blocks via drag & drop.

⊕ When converting from potential/quote to sales/invoice, it is possible to selec

⊕ User-defined fields for positions can now be configured for products an

18.2 Module PDF Templates Plus

⊗ The module has been extended by the possibilities of the new product block:

- several article lists possible
- summary of the item lists
- user-defined fields of the positions
- quantity of product bundles

18.3 Module Timesheets

The Start and End fields now have a similar relationship as known from appointments.

If a start is selected, the end + 1 hour is pre-filled.

If the start or end is moved, the difference between the two is kept.

18.4 Exchange Connector

The synchronisation of e-mails is no longer limited to the CRM Sync folder. In the global setting item "Exchange Connector", the selection "Inbox" is now also availale. If this is selected, all incoming e-mails in the Inbox are automatically synchronized with CRM. Optionally, all sub folders as well as the Sent folder can also be included.

Sending e-mails is now no longer only possible through mailboxes, but also through existing Exchange Connector authentications.

18.5 Global settings

New Invoice block integrated into which some existing setting options have been moved.

New setting in the Invoice block to create custom fields for product or service items.

In the new setting item, revision safe fields from the product or service module can also be selected for display in an item.

Terms and conditions can be configured in multiple languages per client in the company information. In addition, text formatting is now supported.

18.6 Technical changes

In billing modules, it is no longer possible to mix gross/net items within the product block.

The configuration of taxes in the global settings has been made clearer (taxes on shipping costs have been removed).

Both the old and the new web service interface have been extended by the possibilities of item list, optional and alternative items, as well as user-defined fields per item.

Note: Subject to change without notice!

CHAPTER

NINETEEN

VERSION 2020.12

Release Date: 2021-01-19

If you have any questions about the update, please don't hesitate to contact us."

Legende New Updated Fixed

19.1 General

The add-on "Variable Mandatory Fields" is now available! The add-on allows to define variable mandatory fields depending on pick lists. For further information please contact our sales team!

19.2 Technical changes

From now on, columns in pop-ups can be adjusted via the module manager. For example: In case of a quote, the popup of the product list is opened and these columns can now be adjusted individually.

From now on, columns under "more information" can be adjusted via the module manager. If, for example, a different order is desired, or an additional field should be displayed, this can now be set individually.

From now on, it is possible to configure a quick filter for popups for data selection. For example, in the product list popup a quick filter for product category can be added.

For modules with addresses, it is now possible to configure whether the addresses should be transferred "always", "after confirm" (default) or "never" when selecting a data record. The cases in which this query appears have been extended to all module combinations that have addresses.

In popups, in which a pre-filtering of the data records takes place due to the link to the main data record, it is now possible to return to the pre-filtered list by clicking on the button "Show related records". Example: In a quote you select a contact, which shows only contacts linked to an already selected account. If "Show all records" is clicked, all saved contacts are listed. Now you can switch back to the pre-filtered list.

19.3 New REST API

The new CRM+ REST API is available in the beta version.

Note: The documentation can be accessed by replacing everything in your CRM URL starting from "index.php" with "api/docs" (https://my-crm-domain/api/docs).

Note: The existing web services will remain available until further notice.

Note: Subject to change without notice!

CHAPTER TWENTY

VERSION 2020.11

Release Date: 2020-11-17

If you have any questions about the update, please don't hesitate to contact us."

Note: This version includes 2020.10

Legende ➕ New ⟐ Updated ✔ Fixed

20.1 Common

➕ The connection to the business card scanner "SnapADDY" was completed. The add-on can be ordered now!

20.2 Customer Portal

⟐ Design adaptations with similarity to the CRM+ system.

⟐ Theme adaptions from CRM+, also affect the customer portal. The areas "General" and "Login" are now available.

Note: Subject to change without notice!

CHAPTER

TWENTYONE

VERSION 2020.9

Release Date: 2020-09-05

If you have any questions about the update, please don't hesitate to contact us."

Note: This version includes 2020.4 - 2020.8

Legende New Updated Fixed

21.1 Common

Creation, editing and detail views: The icons of the actions remain visible at the top of the screen when scrolling down on the page.

The dashboard widget "Activity History" now offers the possibility to mark appointments/tasks directly as done. For appointments, it is also possible to create a follow-up appointment.

The possibility to let passwords expire after a predefined time has been integrated. This setting can be found in the global settings in the CRM Configurator in the tab "Security".

The add-on "E-Mail Marketing: CleverReach" is now available!

21.2 Global Settings

Login history details: IP addresses are now anonymized.

Cronjobs: The list of cronjobs has been further subdivided.

Cronjobs: For the renewal of OAuth access keys there is a new cronjob that must be activated if this type of login is used in the CRM to connect e-mail accounts.

Workflows: For conditions there is a new operator called "has been changed". This operator checks if a field value has been changed. The old and the new value are irrelevant, they just have to be different.

Module Manager PBXManager: The example URLs for the client configuration of the add-on "Softphone Connector" have been extended by the program "TAPICall".

Option of FTP backup has been removed, only SFTP is possible.

21.3 Technical Changes

Invoices: An invoice of the type "Subscription" must have at least one subscription item.

Add-on proximity search: Inactive modules are no longer displayed for pre-filtering based on lists/reports.

Records that are synchronized with the Exchange are now locked after a change until the synchronization is completed. This only affects changes to synchronized fields.

If a user is deleted, his views are also deleted. Previously these were transferred to the selected substitute user.

The order of options in the action menu of list views has changed.

21.4 Connecting Email Accounts

Authentication via OAuth access key is now possible for mailboxes, mail scanners, exchange connector and the global mail server. Integration includes Google and Office365 accounts.

Mailboxes can be switched to the new login by clicking the corresponding button in the settings of the respective mailbox.

Note:

- Both providers will turn off the login option used in CRM to date in the course of 2021.
- Information from Google on this topic: https://gsuiteupdates.googleblog.com/2020/03/less-secure-app-turn-off-suspended.html
- Info from Microsoft on this topic: https://techcommunity.microsoft.com/t5/exchange-team-blog/basic-authentication-and-exchange-online-april-2020-update/ba-p/1275508

Important Note

In the "Global Settings" in the "FTP Backup" item, the insecure "FTP" option was removed as announced.
Now only the secure variant SFTP is available, which transfers the data encrypted.
Now only the secure variant SFTP is available, which transfers the data encrypted.
Existing FTP configurations have been deleted and SFTP must be reconfigured manually if necessary.
Existing SFTP configurations have remained unchanged.

No backups were deleted!

Note: Subject to change without notice!

CHAPTER

TWENTYTWO

VERSION 2020.3.4

Release Date: 2020-05-05

If you have any questions about the update, please don't hesitate to contact us."

Important announcement

In the "Global Settings" in the "FTP Backup" item, the insecure "FTP"option is removed. Then only the secure variant SFTP is available, whichtransfers the data encrypted.

Existing FTP configurations will be deleted and SFTP must be manuallyreconfigured. Existing SFTP configurations remain unchanged. No backups aredeleted!

This change will probably be delivered with CRM version 2020.8 at the beginningof Sept. 2020.

Note: Subject to change without notice!

CHAPTER

TWENTYTHREE

VERSION 2020.3

Release Date: 2020-04-07

If you have any questions about the update, please don't hesitate to contact us."

23.1 Common

- Homepage Widget "Localization": Records of the selected modules can be filtered based on list views or reports.
- Modules Appointments & Tasks: CSV and ICS exports and imports are now possible.

23.2 Module Social Wiki

- The field "Assigned to" can be changed using mass edit.

23.3 Module Comments

- Sub comments are now sorted in ascending order by creation date.
- An Admin, Customer Admin, Superuser or creator of a comment, can delete it, if the related record has been deleted from the Recycle Bin.
- Example: A contact is deleted and removed from the Recycle Bin. The comments of the contact can then be deleted.

23.4 Module PDF Template Generator

- A new placeholder type allows the generation of bar codes for different standards, e.g. EAN-13.

Note: Subject to change without notice!

CHAPTER

TWENTYFOUR

VERSION 2020.2

Release Date: 2020-03-10

If you have any questions about the update, please don't hesitate to contact us.

24.1 Common

- Module Appointments: You can set default views for calendar and list view independently. The selection is also saved independently for the current session.
- Global search: After a search has been performed, the search term, the total number of hits and the modules searched are now displayed in addition to the search results.

24.2 Add-on Radius search

- Using the "Theme adaptations" setting in the global settings, you can now define your own colors for pins based on the selection values of the "Type" organization field.
- List views or reports from the respective modules can now be set as additional filters in the radius search popup.
- Addresses can be added manually in the search window. Existing addresses can be edited.
- The search can be called up again and the waypoints can be edited manually afterwards.

24.3 Technical Changes

- Module Manager: Tab "Standard modules" has been renamed to "Modules" and "Special modules" to "Functions". In addition, several preference items have been moved from "Modules" to the "Functions" tab.
- Approval Center: In addition to selection lists, checkboxes are now also selectable as fields for conditions.
- Comments with CRM notification: When calling a record displayed in the message center, the message is automatically marked as read.
- Webforms: In addition to the Leads module, webforms can now also be created for the Contacts, Vendors and Partners modules.

24.4 Help Area/CRM Manual

- The new help area is now available.
- The revised and greatly expanded CRM+ manual is available within the help area.

Note

- The add-on “**Softphone Connector**” has been released recently and allows the connection of many telephone systems with the help of a softphone.
- The add-on “**Visit Reports**” is now available and allows to create visit reports.

For more information please contact us via ticket or e-mail.

Note: Subject to change without notice!

CHAPTER

TWENTYFIVE

VERSION 2020.1

Release Date: 2020-02-11

If you have any questions about the update, please don't hesitate to contact us.

25.1 Common

- Home module: In widgets with list views, a new record can now be created directly from the widget using a new icon.
- Module Dashboard: In widgets with list views, a new record can now be created directly from the widget using a new icon.

25.2 Technical Changes

- E-Mail Scanner: In the settings of the E-Mail Scanner the action buttons have been replaced by icons (including tooltip).

25.3 Help area/CRM manual

- The new help area is now available
- The revised and greatly expanded CRM+ manual is available within the help area.

Note

The add-on "**Telephony Plus**" has been released recently and allows the connection of many telephone systems with the help of a softphone. For more information please contact us via ticket or e-mail.

CHAPTER TWENTYSIX

VERSION 2019.13

Release Date: 2020-01-14

If you have any questions about the update, please don't hesitate to contact us.

26.1 General

- If a record is edited and at least one change has been made, a query will be displayed if you want to close or change the page without saving or canceling.
- Global settings: The setting item "Global standard fields" has been moved to the "Studio" area and "Details of login history" to the "Other settings" area.
- Email creation: The search field in the popup for selecting a private or global template is now focused.
- CSV Update: CSV Update functionality has been added to the Products and Services modules.
- Email accounts module: The actions drop-down menu has been replaced with icons.
- Invoice module: If an asset is selected in the product block, the product is checked accordingly. Depending on the result, corresponding actions are offered.

CHAPTER

TWENTYSEVEN

VERSION 2019.12

Release Date: 2020-01-14

If you have any questions about the update, please don't hesitate to contact us.

27.1 General

- Module Recycle bin - automatic deletion routine: In "Global settings - Module manager - Recycle bin" an automatic deletion routine with number of days can be defined individually for each module. The adminstrator receives corresponding notifications via message center about executed deletion processes. The value 0 means no automatic deletion routine.
- Comments: The type of notification (as CRM notification/as e-mail notification) can now be saved per user as default under "My settings".
- Global search: Links to records in the search results are now opened in a new browser tab.
- Customer Portal: On the login page the image slider has been removed. Only one image is displayed statically.
- Module Home: If reports are displayed in a widget, the number of displayed records in the widget can now be set. If the total number of records exceeds the set number, a page navigation is displayed.
- Charts in list view: The creation of charts has been optimized, e.g. the dialog for creating charts is closed automatically after completion.
- Filters in user-defined list views: In a filter of a list view it is now possible to select a report as an additional filter. Prerequisite is the same main module. This allows cross-module filter options.
- CSV Import: A CSV import can be confirmed in the message center. A confirmed import can then no longer be undone via the message center.

27.2 Calendar

- File attachments can now be added to appointments and tasks. When MS Exchange is connected, the attachments are synchronized accordingly.
- Quick Create: If a new appointment is created, the field "Description" is available as CKEditor. Thus formatting will not be lost during save.

27.3 Technical Changes

PDF Templates Plus: In overwritable templates, a manually inserted page break is taken into account even if it is within a table.

CHAPTER

TWENTYEIGHT

VERSION 2019.11

Release Date: 2019-11-19

If you have any questions about the update, please don't hesitate to contact us.

28.1 General

- Module Accounts: A click on the account name in the popup "Show Account Hierarchy" opens the record in a new browser tab. This also applies to hierarchy popups in other modules.
- General: Mass editing (edit/delete): If the user does not have permission to edit or delete one or more selected records, a new popup will now offer a log file for download.
- Create email: If recipients have several email addresses, they are grouped by recipient name in the selection popup.
- Module Recycle Bin: The same columns are now displayed for all modules in the list view. In addition, it is now possible to read directly from the list view which user deleted a record at which time.
- Vendors module: In the tab "More information" the button "Create contact" was added.
- Contacts module: The icon for calling up an account has been repositioned.
- All modules: The field "last editor" was added in the default view. It can be enabled for other views in the layout editor.

28.2 Calendar

- Mobile View: When creating or editing appointments and tasks, relationships can now be selected.
- Calendar sharing for private appointments: The checkbox "edit" is shown as a further share option if the share "Deputy (full control)" is selected and the checkbox "Can see all details of private appointments" is checked.
- Private appointments: If a private appointment is created for another user, the creator will only have access to users who have given approval for editing private appointments.
- Appointment invitation: In case of a confirmation, a corresponding message is displayed in the CRM.

28.3 Technical Changes

- Module Project Teams: Team members are now always displayed with first and last names.
- Module Invoices: Both the fields "Invoice type" and "Duration", as well as blocks in which one of these fields is located, can no longer be hidden. If this was the case, these fields or blocks are displayed again.
- Module Partner: When adding values to the "Type" field, the order was incorrect. In the course of correcting this behavior, the default order was restored.
- Module Manager: Mandatory fields are now displayed in all views ("Standard" view and all user-defined views). If this was not the case, they are displayed again in all views.
- Module Reports: The tabular reports contained in a report set also includes the grouping of the respective tabular report now.
- Proxy server: The setting item "Proxy Server Settings" in the global settings and the configuration items for the proxy server in "CRM Configurator - Customer Portal" have been removed.
- Module Email accounts: Already referenced emails that are in the CRM recycle bin are no longer displayed with a link, but with a corresponding message.

Note

- The module "Newsletter" was completely removed as announced!
- The module "PDF Template Generator/PDF Templates" was completely removed as announced!

CHAPTER

TWENTYNINE

VERSION 2019.10

Release Date: 2019-10-22

If you have any questions about the update, please don't hesitate to contact us.

29.1 General

- Icons: In about ten modules other icons are used, because these were used twice for several modules before, or were not suitable.
- The time filters "the last/next 180 days" and "the last/next 365 days" have been added to the filter settings for list views and reports.
- Module Invoices: The status "paid" in an invoice can now only be set by users who have permission to edit the record.
- Module Invoices: For subscription invoices, the link to the master invoice has been highlighted.
- Field Ticker Symbol: The Yahoo API used for the field "Ticker Symbol" (stock quotes) has been removed. The field is not removed by Brainformatik for informational purposes only, but can be deleted by your admin access if required.
- Product block: In all modules which use the product block (e.g. invoices) the field "Position discount" (sum of position discounts) was inserted. This field is also available as a new variable for PDF Templates Plus.
- Module Manager - Layout Editor: The icon for direct access to the selection list editor is only displayed if the selection list is editable.
- Exchange Connector: If an email has already been synchronized using Exchange Connector and is also scanned by a configured email scanner, the email is only created once as a data record. The same is true for the other direction where email scanner scans the mail first and Exchange Connector tries to synchronize it afterwards.
- Workflows: In the case of time-delayed workflows, a time of execution can now also be defined.

29.2 Calendar

- Module Tasks: The “End” field has been renamed to “Due Date”.
- Module Tasks: In the case of reminders, the start of working time is prefilled in the 1st note, and the start + 1 day in the case of the 2nd note.
- Module Appointments - Add participants: If an appointment refers to a contact, when contacts to be invited are selected, primarily contacts of the organization linked to the contact are displayed. It is still possible to search for and select all other contacts.
- Module Appointments: When the status icon of an invited entity is hovered, it shows when the invited person accepted or rejected the appointment.

29.3 Technical Changes

- DATEV: If the DATEV add-on is active, no total discount for billing data records can be assigned. An export of existing invoices with total discount to DATEV is also not possible.
- Selection list editor: For multi-selection lists which have not been defined as mandatory fields, values can be deleted without a replacement.
- CSV Update: The action “CSV Update” is now only available in the modules in which the action was planned. For all other modules this action has been removed.
- Global Settings - Manage Logs (InHouse): Warnings were previously stored in the file “php_error.log”. Corresponding entries are now stored in the separate file “php_warning.log”.

Note

In the customer portal - knowledge base section - there are the following new features:

- Category “Videos”: Here you can find some recordings on various webinar topics. You can also download these recordings as video files.
- Category “Updates - published”: All update information is available here starting from 01/2019, sorted by publication date.
- Category “Updates - unpublished”: The update information for the next CRM+ update is available here.

Important

The API (programming interface) of the provider “Newsletter2Go” was discontinued on 01.03.2019.The module “Newsletter” was set to “read only” by an update on 26.02.2019 and all actions accessing the API were deactivated.The “Newsletter” module will be completely removed in mid-November!

The PDF Template Generator/PDF Templates module has been set to “read-only”. The old editor will then be completely removed in mid-November!

CHAPTER

THIRTY

VERSION 2019.9

Release Date: 2019-09-24

If you have any questions about the update, please don't hesitate to contact us.

30.1 General

- The "Email accounts" module is permanently displayed as an icon to the right of the "Tasks" icon for faster access.
- As already announced, no PDF files can be exported via the old module "PDF Templates" or "PDF Template Generator". Please use the new PDF Template Plus Editor to export the PDF templates. You will find the button for the export in the upper left corner next to the icons Edit, Delete, Change Tracking etc.
- If a product is added to an invoice and the icon for assets is clicked, it is now possible to select more than one asset (if available).
- If an email is linked via the "Email accounts" module, the linked records are displayed on the right side of the screen. This view has been revised and is now clearer.
- The subject line when writing an e-mail has been adapted to the length of the recipient lines.

30.2 Calendar

- A direct input of values in date fields is now possible again by popular request.
- The display of birthdays is now available. The function must be enabled globally in the module manager for appointments in the basic configuration item. Further information can be found in the manual.
- If very bright colors for event types are configured, black font color is now used in the calendar display to achieve a better contrast.
- For the widget "Appointments & Tasks" the selection of the calendar to be displayed has been made clearer.
- If an invited user deletes his appointment, the appointment creator gets a message in the CRM about this cancellation.
- The calendar colors for groups under "My Settings" have been moved to a separate block for a better overview.
- When creating a new date field in the Layout Editor, the field type is set to "Date" by default.

30.3 Technical Changes

Webservices: Date fields with time are always delivered in the user time zone and must also be transferred to the API in this way.

Hint

In the customer portal - knowledge base section - there are the following new features:

- Category "Videos": Here you can find some recordings on various webinar topics. You can also download these recordings as video files.
- Category "Updates - published": All update information is available here starting from 01/2019, sorted by publication date.
- Category "Updates - unpublished": The update information for the next CRM+ update is available here.

Important

The API (programming interface) of the provider "Newsletter2Go" was discontinued on 01.03.2019.The module "Newsletter" was set to "read only" by an update on 26.02.2019 and all actions accessing the API were deactivated.The "Newsletter" module will be completely removed in mid-November!

The PDF Template Generator/PDF Templates module will be set to "read-only" in mid-September. Please make sure that you have all necessary templates available in the PDF Templates Plus module by this time. The old editor will then be completely removed in mid-November!

CHAPTER

THIRTYONE

VERSION 2019.8

Release Date: 2019-08-27

If you have any questions about the update, please don't hesitate to contact us.

31.1 Calendar

- Appointments: In the planning view all groups of the user were preselected before. With the new update, the user can select which group calendars are to be displayed. This selection is then permanently saved for the user.
- Appointments and tasks: The popular icon "green tick" for appointments and tasks is available again. This allows appointments to be set to "accomplished" and tasks to be set to "finished". This function is available in the list view of appointments and tasks as well as in the "More information" of other modules.
- Appointments: With the integration of the icon "green checkmark" an additional function "Follow-Up" is provided for appointments. If the function has been configured under "My settings", a popup is displayed when clicking on the green check mark, which offers the possibility to create a new "Follow-Up" appointment.
- Task sharing: Under "My Settings" the "Task sharing" has been integrated. As with the calendar shares, users can determine which shares should be granted to other users.
- Picklist editor: Previously, values for the "Status" field in appointments and tasks could not be modified. These values can now be edited/deleted in the picklist editor. The default values can still neither be edited nor deleted.
- Calendar view: For appointments, icons for "edit" and "delete" are displayed.
- Radius search add-on: The geofilter for user-defined list views has been extended for the Appointments and Tasks modules.

31.2 Technical Changes

- CRM Configurator/General: The upload limit setting for e-mail attachments is working correctly again. Please check your settings to see if the desired limit has been set.
- Fields - Appointments and Tasks: User-defined calendar fields that were created at the time of the "old" calendar are again having the property "quick edit" (edit by double-clicking).

Note

In the customer portal - knowledge base section - there are the following new features:

- Category “Videos”: Here you can find some recordings on various webinar topics. You can also download these recordings as video files.
- Category “Updates - published”: All update information is available here starting from 01/2019, sorted by publication date.
- Category “Updates - unpublished”: The update information for the next CRM+ update is available here.

Important

The API (programming interface) of the provider “Newsletter2Go” was discontinued on 01.03.2019.The module “Newsletter” was set to “read only” by an update on 26.02.2019 and all actions accessing the API were deactivated.The “Newsletter” module will be completely removed in mid-November!

The PDF Template Generator/PDF Templates module will be set to “read-only” in mid-September. Please make sure that you have all necessary templates available in the PDF Templates Plus module by this time. The old editor will then be completely removed in mid-November!

CHAPTER

THIRTYTWO

VERSION 2019.7

Release Date: 2019-07-30

If you have any questions about the update, please don't hesitate to contact us.

32.1 Calendar

In the calendar view (module Appointments) the new planning view is available. If you click on the new icon for the planning view, your own calendar and the group calendars are displayed by default. In addition, calendars shared by other users can be selected.

32.2 Picklist Dependency

If selection picklist dependencies are defined for a module, these are also available for quick creation of a data record.

32.3 Webservices (API)

Webservices provide the time stamp including seconds (for example: "2019-07-04 08:10:00"). When passing data to CRM + (for example, create), both formats (with and without seconds) are accepted.

Note

In the customer portal - Knowledge Base - you will find some records about various webinar topics in the category "Videos". You can also download these recordings as a video file.

Important

The PDF Template Generator/PDF Templates module will be set to "read-only" in mid-September. Please make sure that you have all necessary templates available in the PDF Templates Plus module by this time. The old editor will then be completely removed in mid-November!

CHAPTER

THIRTYTHREE

VERSION 2019.6

Release Date: 2019-07-02

If you have any questions about the update, please don't hesitate to contact us.

33.1 Module Calendar

- In "My Settings -> Calendar", in addition to the types of an appointment, you can now also configure special colors for your own groups.
- In the global settings for groups, the group calendar can be activated per group. This allows all users of this group to be assigned special rights for creating, editing and deleting appointments for this group.
- Invited users can set the status of their own appointments via a separate action in the detail view.
- The widget "Tasks and Appointments" is now available for the homepage. This widget provides a common overview of open appointments and tasks. Records can also be set directly to "done" or "accomplished".
- A new task status "overdue" is available. A cronjob can also be activated for this status, which automatically sets the status "overdue" if the end date is exceeded.

33.2 Module Invoice

The "Accounting period" and "Type" fields can no longer be hidden so that invoices can still be stored correctly.

33.3 Module Projects

The Gantt Chart is now available again in the tab "More Information".

33.4 Global Settings

- Workflow task “Update field” now allows the modification of multi-selection lists. You can supplement or replace the existing values.
- Workflow task “Send emails” now allows to select the language when selecting a template from module PDF Templates Plus.

33.5 Webservices

The “Retrieve” operation now allows querying a document attachment.

33.6 Common

General system optimizations.

Important announcement

The PDF Template Generator/PDF Templates module will be set to “read-only” in mid-September. Please make sure that you have all necessary templates available in the PDF Templates Plus module by this time. The old editor will then be completely removed in mid-November!

CHAPTER

THIRTYFOUR

VERSION 2019.5

Release Date: 2019-06-04

If you have any questions about the update, please don't hesitate to contact us.

34.1 Module Invoice

The "Accounting period" and "Type" fields can no longer be hidden so that invoices can still be stored correctly.

34.2 Module Projects

The Gantt Chart is now available again in the tab "More Information".

34.3 Global Settings

"Manage logs" item (only available to users with "Admin" rights setting): Log files can now be downloaded again in the Firefox browser.

34.4 Common

General system optimizations.

CHAPTER

THIRTYFIVE

VERSION 2024.3

Release Date: from 2024-05-14

If you have any questions about the update, please don't hesitate to contact us.

Note: Note: This version also includes the CRM version 2024.1, 2024.2

Legende New Updated Fixed

35.1 Email communication for tickets combined with the customer portal

Previously, email notifications for tickets were only sent if a contact had active customer portal access

- This was automatically the case as soon as a ticket was created by the customer via the customer portal
- It was also the case when a ticket was created in the CRM and linked to a contact

From now on, email communication is no longer dependent on active customer portal access

- To activate email communication combined with tickets, there is a new central setting option under the global settings
- In the CRM configurator in the Customer portal tab, there is a checkbox 'Activate ticket emails'
- The checkbox is automatically activated with the delivery of this update as long as at least one contact with portal access exists in your system

This change applies to internal and external email communication

35.2 General

References can be created between the "Emails" and "Timesheet" modules via "More information"

When editing text areas by double clicking (with or without HTML editor), the action must be completed by clicking Save or Cancel. Clicking outside the input area no longer has any effect.

35.3 Attachment in customer portal

➕ It is now possible to add attachments directly when creating the ticket

➕ Attachments can be added when creating comments on existing tickets

➕ In CRM, attachments are referenced to the ticket as documents when it is created, as before. Attachments for comments are displayed directly in the comment both in the portal and in the CRM.

35.4 Add-ons “Contingents” und “Time tracking”

➕ A function for billing timesheets has been added

➕ This action is located in the list view of the “Timesheet” module and can be executed after selecting the timesheets to be billed

➕ In all modules that have a reference to timesheets, a corresponding action for billing has also been added in the detail view

➕ Details on the exact billing and the associated function can be found in our manual

35.5 DATEV Add-ons

To support multiple clients, a screen for entering the advisor and client number opens before a long-term token is requested

The mask is prefilled with the information from the add-on settings

35.6 Technical changes

The settings of running cron jobs can no longer be changed

The “modified” field is only updated if a field in the data record has actually changed

Birthday appointments

- Past birthdays (which remain in the system up to one month before the next year’s appointment is created) are set to “completed” status
- Workflows can be defined for creation of and changes to birthday appointments