

SalesCTRL™ Release Notes

September 2023

Task Manager

- Redesign screen
- Increase Task Name to 20-characters and Description to 40-characters
- Add Folder and Sub-Folders to organize Tasks
- Add tree-view look up for Tasks and Actions
- Add Email Library lookup for E-Mail Action
- Retain Filter criteria when switching between Fields and Record
- Enhance grid control for Filter and Sort selections
- Add Show Example, Description, and Logic for Field selection criteria
- Default to Exclude Inactive Records
- Update Email control and add right click edit
- Add Company Action to view/remove selected company records from Filter results
- Add view/removed selected records from Filter results to Contact Action
- Change Update Action to display only updated field selections
- Warn user when changing tables in Update Action that previous selection will be lost
- Correct screen re-size
- Update field selection criteria controls
- Add **Ctrl Home** to prevent/allow users access to modify a Task, and display “This Task cannot be modified by other users”
- Add Select Account Rep to Automated Marketing Action
- Add selection for Account Rep or Reseller to Add Activity
- Update control for E-mail HTML editor to Enter and Test Location for inserting email images including logic for Google Drive links
- Add Enter to insert single line in the E-mail HTML editor
- Add new operators in Filter | Fields | Activity | Activity Code for Occurs / Not Occurs to select Contact records based upon the occurrence of specific activity codes

Export Manager

- Redesign screen
- Add tree-view look up
- Increase Export Name to 20-characters and Description to 40-characters
- Correct screen re-size
- Add Last Updated and Last Used Date and User
- Update field selection criteria controls
- Add **Ctrl Home** to prevent/allow users access to modify an Export definition and display “This Export cannot be modified by other users”

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Import Manager

- Redesign screen
- Add tree-view look up
- Increase Import Name to 20-characters and Description to 40-characters
- Add logic to automatically review incoming record data structure prior to actual import
- Correct screen re-size
- Add Last Updated and Last Used Date and User
- Update field selection criteria controls
- Allow Primary Match logic on Calculated Field
- Add **Ctrl Home** to prevent/allow users access to modify an Import definition and display “This Import cannot be modified by other users”

Email Manager - New

- Create and maintain existing emails for Automated Marketing and Task Manager
- Create, organize, and maintain emails in new Email Library function
- Default ; after enter of email address in the Test Email function to add multiple email addresses
- Update control in email body for image resizing
- Add logic to use images located on Google Drive
- Update the email HTML editor
- Add capability to include YouTube video URL

Letter Wizard

- Redesign Screen
- Update Auto Letter setup screen controls
- Add Tool Tip display of Modify Date and Owner to Lookup by Letter Name function
- Expand pull down display window for Lookup by Letter Name
- Update Microsoft® Word® compatibility
- Update novaPDF® printer driver - SCPDF

Company

- Add hyperlink web site display
- Search by web site disregards www
- Display country name
- Add right click display menu selection
- Retain user display preferences for search grids and screens
- Add company to Company Link creates reciprocal link
- Inactive function in Dates (F9) greys out information for Company and Contacts

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- Update Company Master File Report format
- Optimize Company Master File Report for iPad® email display
- Add user name to Last Updated field on Dates screen (F9)
- Correct screen re-size
- Increase number of customer fields on Company tab from 10 to 16
- Increase number of custom fields from 20 to 30 per tab
- Add Display Inactive Checkbox for Company name search
- Advanced Search on custom fields defaults to GT (Greater Than) if field is blank

Contacts

- Hyperlink email display including Alternate Address
- Display country name
- Add right click display menu selection
- Add Email Library look up to select pre-defined emails
- Retain user display preferences for search grids and screens
- Add contact to Contact Link creates reciprocal link
- Inactive function in Dates (F9) greys out information for Contact
- Update Contact Master File Report format
- Optimize Contact Master File Report for iPad® email display
- Update Microsoft Outlook® 2013 and 2016 integration
- Add Copy to Outlook Contacts in Copy function
- Add user name to Last Updated field on Dates screen (F9)
- Integrate Google Maps for Get Directions
- Correct screen resize issue
- Increase number of customer fields on Contact tab from 3 to 6
- Increase number of custom fields from 20 to 30 per tab
- Add Display Inactive Checkbox for Contact name search
- Advanced Search on custom fields defaults to GT (Greater Than) if field is blank

Get Directions

- Add right-click edit for address block
- Integrate with Google® Maps

Detail Tabs

- Cosmetic changes
- Improve Search function performance

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Activity

- Increase Reference field size from 50 to 60 characters
- Add right click Customize for column headings hide, display order, and description
- Add paperclip icon to designate activity attachments
- Add right click display menu selection
- Add right click Hot Key Comments
- Add Pin function to display activity at the top
- Add Undo and Redo functions to Comments and Reference fields
- Retain user specific display preferences for search grids and screen
- Update Activity Report format
- Optimize Activity Report for iPad® email display
- Add Company Activities check box to Search function
- Retain Search results screen after reviewing activity
- Add file drag and drop, and copy and paste for attachments
- Add display and selection of individual attachments when activity has multiple attachments
- Add checkbox for Company Activities to Search Activity function
- Correct insert issue when editing comment
- Add activity banding per user
- Drag email to activity saves original email format as attachment

Advanced Search – Magnifying Glass

- Add PM (partial match), EQ (equal), NE (not equal) SF (search for value) and NF (value not contained) to search criteria fields

To Do List

- Add right-click on column headings to customize description, display/hide fields & order
- Add right-click to Select Past Due Follow-Up and Mark as Completed
- Add new Print control to select output to Screen, Printer, File (multiple types), Clipboard and Email
- Output to File type XLS spreadsheet with new formatted columns runs Excel®
- Add Selection range for activity priority (1-9)

Query Wizard

- Update user interface, icons, and screen grid control
- Add right click menu functions
- Add toggle to display selection criteria description, logic and example
- Update selection screen to include additional fields in Query output
- Update field selection criteria controls

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- Add Test function for reviewing output results
- Add new Print control to select output to Screen, Printer, File (multiple types), Clipboard and Email
- Output to File type XLS spreadsheet with new formatted columns runs Excel®

Automated Marketing

- Redesign screens and user interface
- Add Dates to retain Date Created, Last Updated, and User by Track and Step
- Add Notes button to Marketing Track
- Add Email Library look up
- Add Date Range selection to the History Report
- Increase Marketing Track Name to 25-characters
- Increase Marketing Track Description to 50-characters
- Add selection for Account Rep or Reseller to Add Activity Action
- Cosmetic changes to print function and reports

Maintenance

- Update user interface and icons for Code, Account Rep, Sales Partner, Activity Template, Detail Tab Template, and Transfers functions
- Add ability to change the Code field name

Login Maintenance

- Update User name in User Maintenance when change is made in Login Maintenance

User Maintenance

- Option to display Past Due Follow- Up Activities first on Customer Activity screen list
- Option to display Preferences (Login, General and User List) on Tool Bar by user
- Process Past Due Activity Follow-Up E-Mail Reminders to assigned Follow Up Rep and designated Bcc: email addresses
- Disable HotLink tab in User Maintenance when HotLink is not licensed

Admin | Database Menu | Change Database

- Update user interface, icons and screen grid controls
- Add prompt to Remove records from Restore Deleted Companies, Contacts & Activities
- Add right click functions to Expression Builder in Change Database
- Add double click to select fields in Expression Builder
- Add checkbox to display Expression description
- Add ability to customize Activity Job ID, Amount, Quantity and Close % fields
- Add ability to perform calculations on numeric Coded Field descriptions

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Admin | Database Menu | Sort Database / One Line Display

- Add custom fields to Company and Contact One Line Display

Admin | Database Menu | Database Preferences | Log Off

- Enables access to **Admin | System Security | User Maintenance Log Off** feature
Enable Log Off User – control automatic log off timeframe by user
Enable User Status List Log Off – allow user to log off other users listed in the System Security | User Status List

Admin | Screen Designer

- Single screen to manage page headings, field captions, and display order with drag and drop, and grouping with captions
- Add ability to reuse fields on multiple screens

Database Preferences – SMTP Setup

- Update STMP control for more reliable and faster email processing
- Add support for [MailPro](#) Email SMTP Server

Batch Processor

- Update user interface and icons
- Increase Task Name to 20-characters and Description to 40-characters

Utilities | Mass Code Change

- Update user interface
- Allow selection of multiple code changes

Utilities | Validate Field Calculations

- Improve performance when recalculating custom fields with a calculation expression

Utilities | Synchronize First / Last Activities

- Rework logic, improvement performance and cosmetic changes

Utilities | Remove Blank Records

- Add all database tables for blank record removal
- Any file named Release_Notes.PDF located in the SalesCTRL install directory will add menu item Release Notes and display file when selected

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General

- Implement new display font Segoe UI
- Update menu Icons
- Increase number of items displayed in field pull downs
- Update workstation install (scwkstn.exe) for Windows 8 and 10 drive mapping
- Update single user / network install program (scnew.exe and scupdate.exe)
- Add Build Date to login screen

OSAS®, Order PLUS!™ and TRAVERSE® HotLink™

- Update user interface, icons, and cosmetic issues
- Retain user specific screen resizing preferences
- Add Print to spreadsheet for reporting through Excel®
- Add TRAVERSE® Global compatibility
- Add Order PLUS! v7.6 compatibility
- Add customer inventory alias to order entry
- Enhance speed of sales history inquiry with large data sets
- Add Skip Inactive Customers to Customer Transfer function
- Add Inventory Location access control to User Maintenance
- Change OSAS® ODBC Setup to eliminate individual workstation setup
- Ability to link SalesCTRL databases to different OSAS databases
SalesCTRL Database1 -> OSAS1, SalesCTRL Database2 -> OSAS2, etc.
- Add SMTP error handling for email quotes and acknowledgements
- Add restore of standard quote, acknowledgement, and picking slip forms