SuperOffice AS

What's new in SuperOffice 8.4

SuperOffice AS – Research and Development

Updated: 11 December 2018

Summary of Highlights

SuperOffice 8.4 - is the current major upgrade of the SuperOffice CRM platform.

Forms are the new main feature and is a powerful engine to get information from a form into SuperOffice without too much integrations and hassle.

Forms make it easier to interact with customers and prospects via your website or Customer Centre. A wide variety of data can be added in a form (including file upload) and you can add a number of automated actions to perform when the form is submitted and processed.

It’s easy to create a form and post it on any web-page you want it to show, like “Contact us” form, and it’s easy to transform all those new prospects to contacts in SuperOffice.

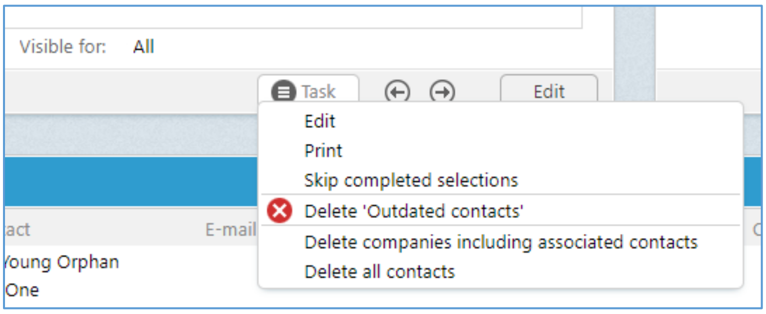
Forms are available for users with Complete and Marketing user plan, but the tab for Forms submissions is available for all users.

New functions in the sub release of 8.4 are added to this document:

- 8.4 R02 – ERP sync improvement
- 8.4 R03 – ERP List sync, Service improvement
- 8.4 R04 – ERP, Chat, Form, Service improvements

Contents

Selection – Delete all contacts

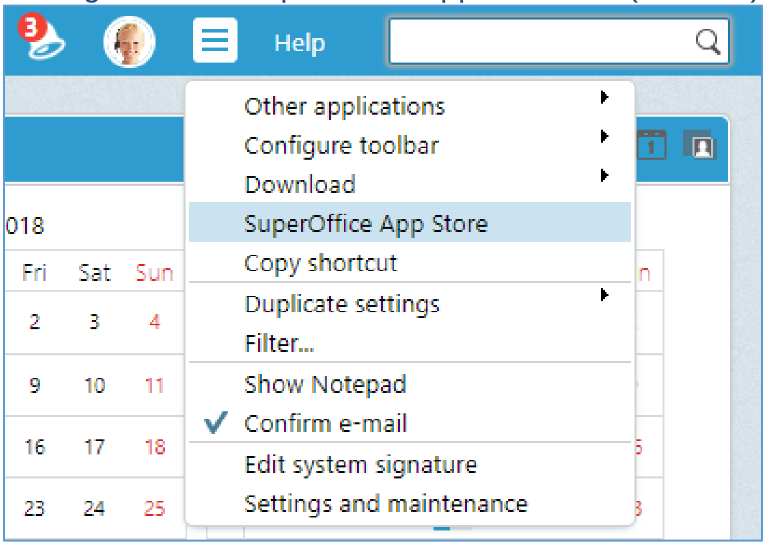


From selection you can delete the selected contacts, not only the companies. Click on **Task** and select **Delete all contacts**.

It will be easier to keep your SuperOffice data with less clutter and better quality.

Remember: You can always go to your **Recycle bin** and restore the contacts or companies that you regret deleting.

Settings menu – SuperOffice App Store link (8.4 R02)



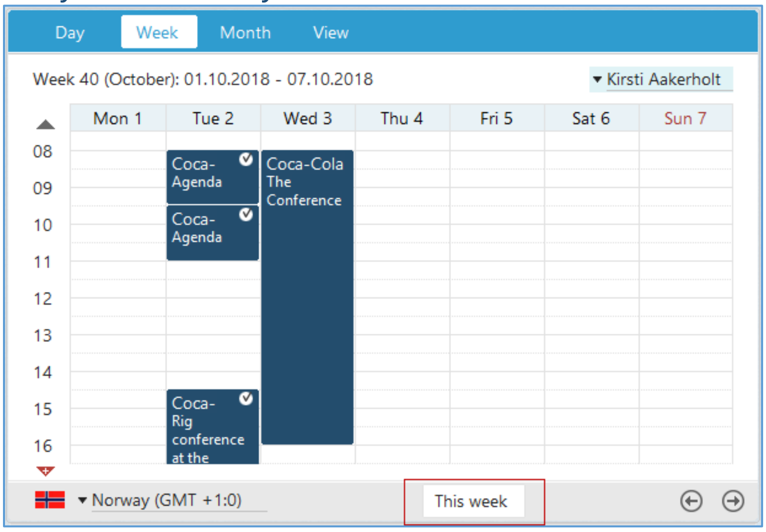
When you click on the Settings menu, you have a link in the drop down list for **SuperOffice App Store**.

This will open the App Store where you can explore standard apps, modules and integrations that can expand your SuperOffice CRM Online solution.
https://online.superoffice.com/appstore

New and improved Windows client

There will always be some differences in the Windows and Web client. See below for Windows changes

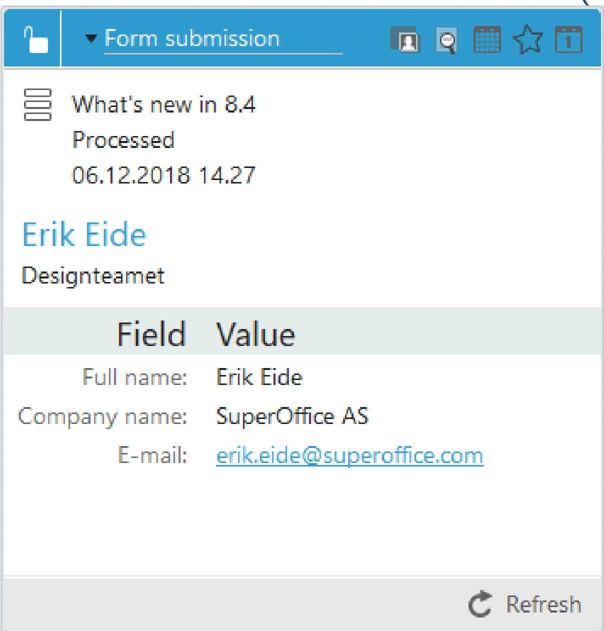
Diary – Go to today/week/month -button



On Day, Week, Month and View tab in the Diary, a button shows to select **Today**, **This week** or **This month**.

This makes it much easier to get back to today in the view you are on. Off course you can use the Diary navigator list, and Todays button on the mini card calendar or todays date in the top right corner, but with this button it's so easy to get back to today's view with one click only.

Mini card – Form submission or Preview (8.4 R04)



From the **Mini card** selector, you can select **Form submission** and then select in the Activities archive the form submission you would like.

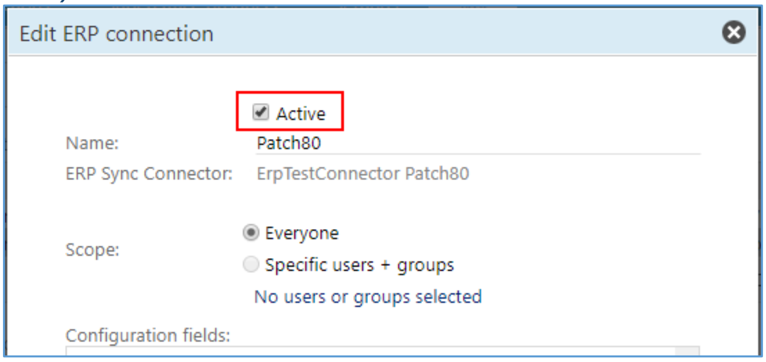
When selection **Preview** in the Mini card, you also get the same info.

This is very convenient to get a quick overview when browsing different contacts.

The same information is available from the Form submission dialog in the activities archive.

New and improved Settings and maintenance

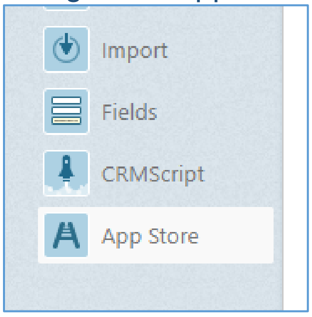
Quote/Sync – Set ERP connections to inactive (8.4 R02)



If one of the ERP connections you have added no longer work, it's possible to set the dead connection to Inactive, or set Active to OFF.

Like that dead connections will not stop the sync or show extra error messages.

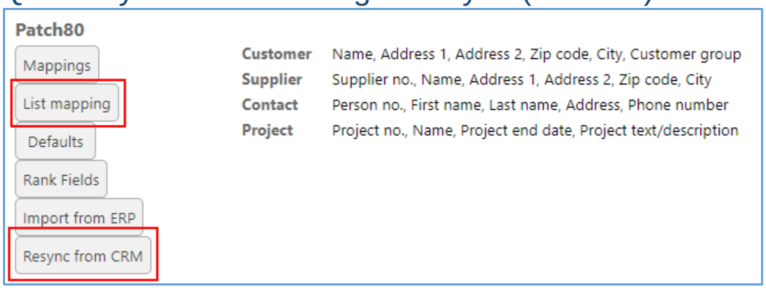
Navigator – App Store button (8.4 R02)



In the navigator it's added a new button for App Store. This will open the App Store where you can explore standard apps, modules and integrations that can expand your SuperOffice CRM Online solution. https://online.superoffice.com/appstore

Our App Store is only for SuperOffice CRM Online users.

Quote/Sync – New settings on Sync (8.4 R03)

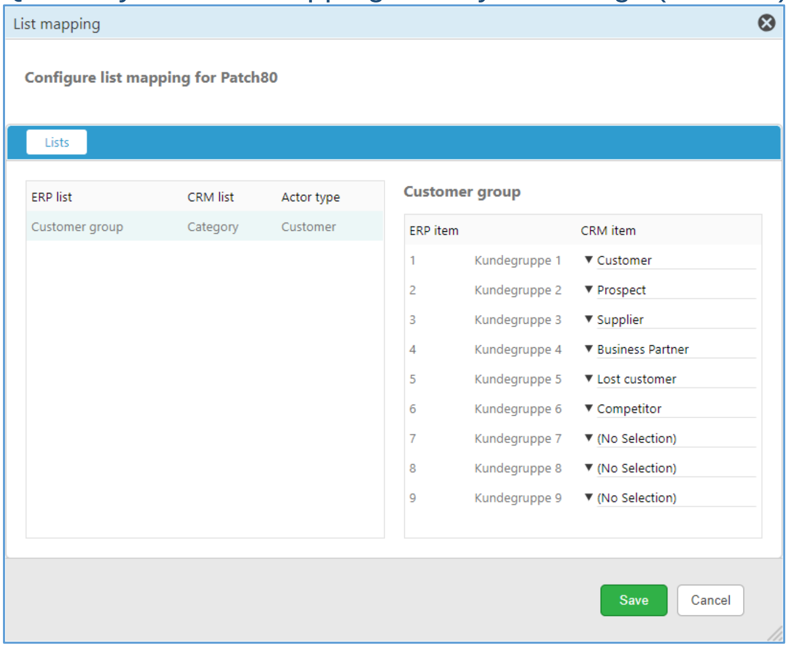


There are two options in the ERP connection:

- List mapping
- Resync from CRM

See below for more explanations.

Quote/Sync – List mappings for Sync settings (8.4 R03)

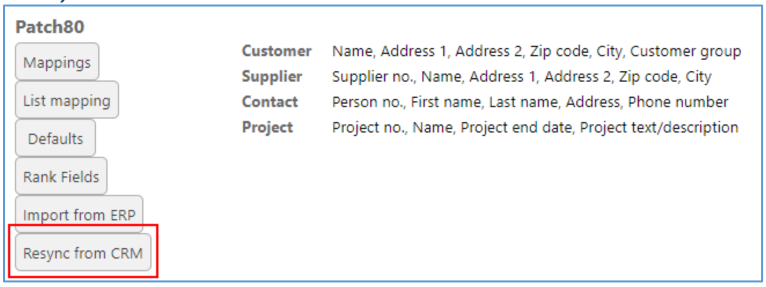


The **List mapping** button will open the dialog for **List mappings**.

It will give you the possibility to link values on the ERP list Customer group and the CRM list Category. The settings will of course be different from ERP system to ERP system.

Just link the different fields with correct info in SuperOffice CRM and save the changes.

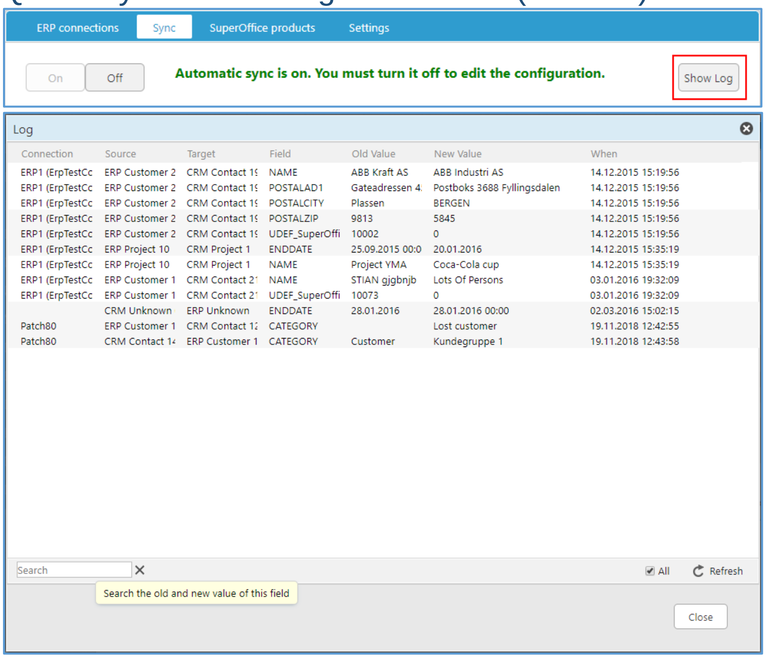
Quote/Sync – Resync from CRM for Sync settings (8.4 R03)



To resync CRM data to the ERP system, click the button **Resync from CRM**. This is when you know that the SuperOffice CRM data is the most accurate, you click the sync button.

When the Sync is set to ON, the fields will be automatically synced between the ERP system and the SuperOffice CRM client.

Quote/Sync – Show log with search (8.4 R03)



When you want to see the log of what is synced, then click **Show log** - button.

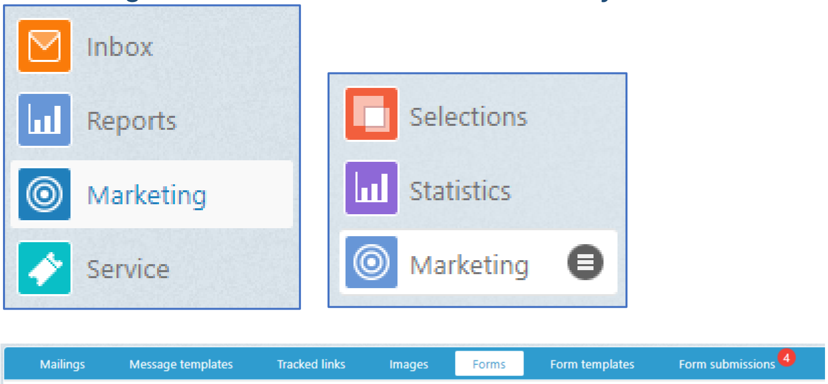
You can **search** for text in the columns for:

- Old value
- New value

This is very convenient when you know the old value or the new value, to see what and when it was synced from where (**Source**) to where (**Target**).

New and improved Marketing

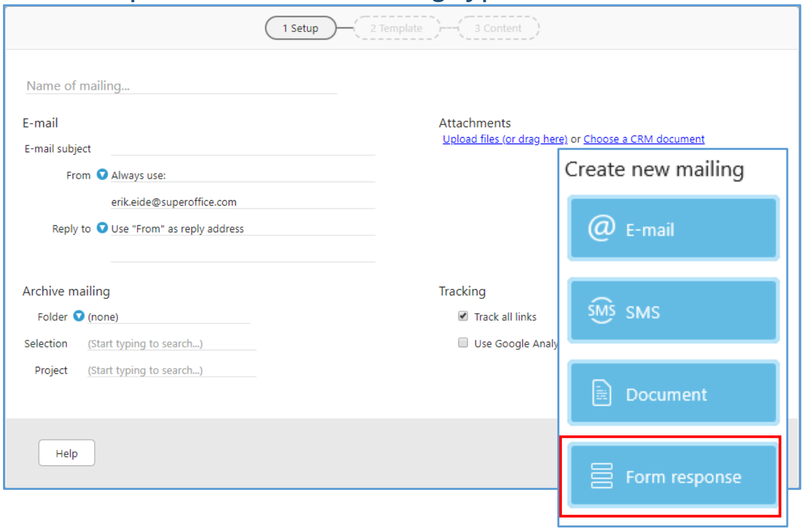
Marketing – new name – same functionality



Since the introduction of **Forms**, the name Mailing was no longer a good name for the navigator and main panel.

We have changed it to Marketing, like that it's more in sync with the user plan and that it contains both Mailing, Message templates, Forms and Form submissions.

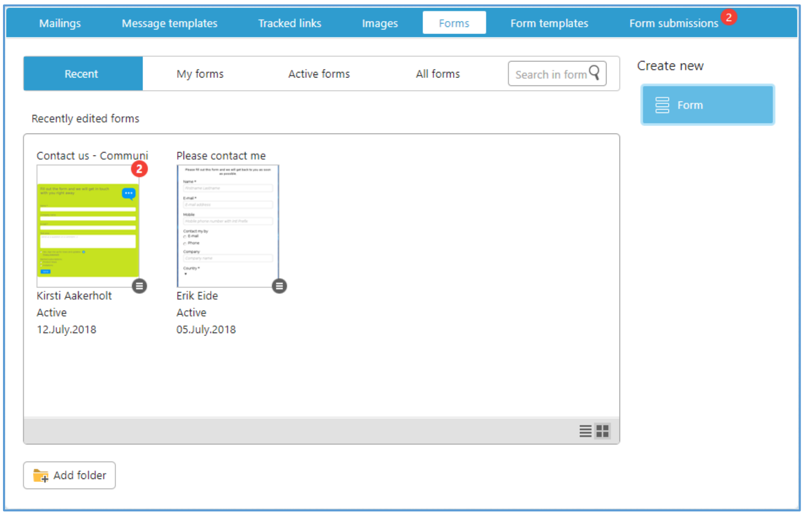
Form response – a new mailing type for forms

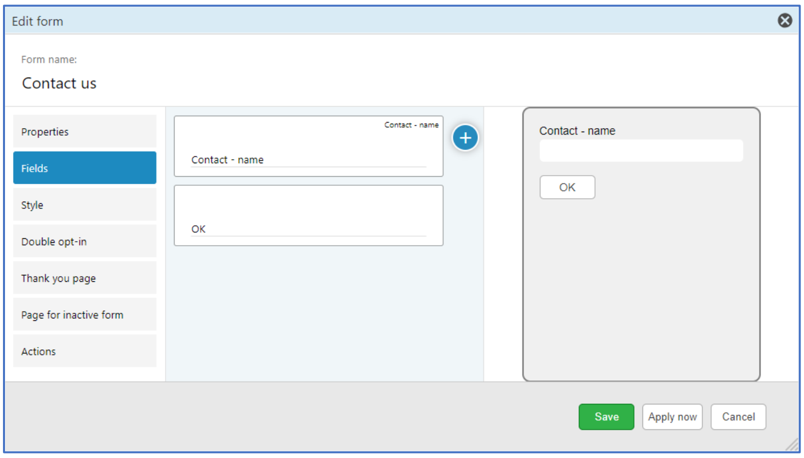


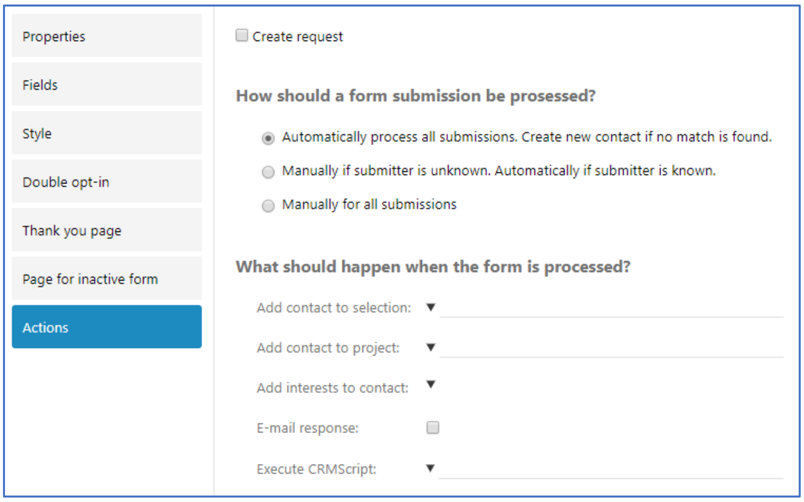
There is a new **mailing type** called **Form response**. This mailing type have less possibilities that the normal E-mail mailing type.

You have the **Setup** tab, **Template** tab and **Content** tab. That means you will not have a Recipients tab or a Confirm with send options.

Forms – Create form





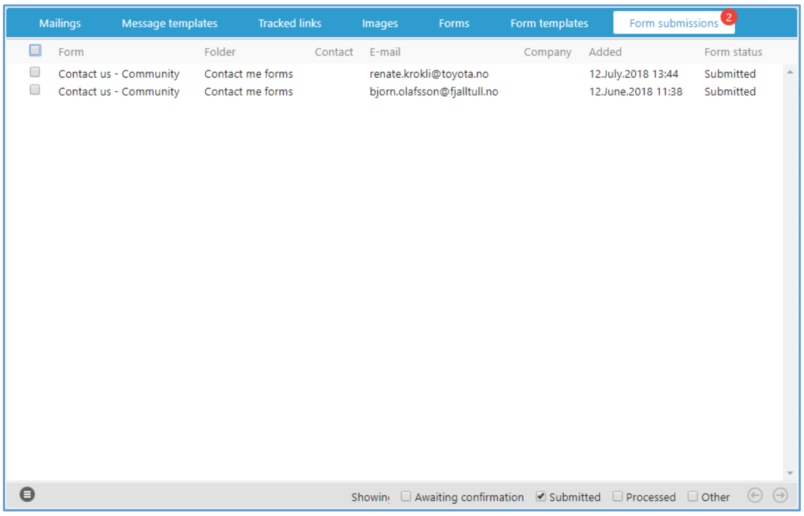


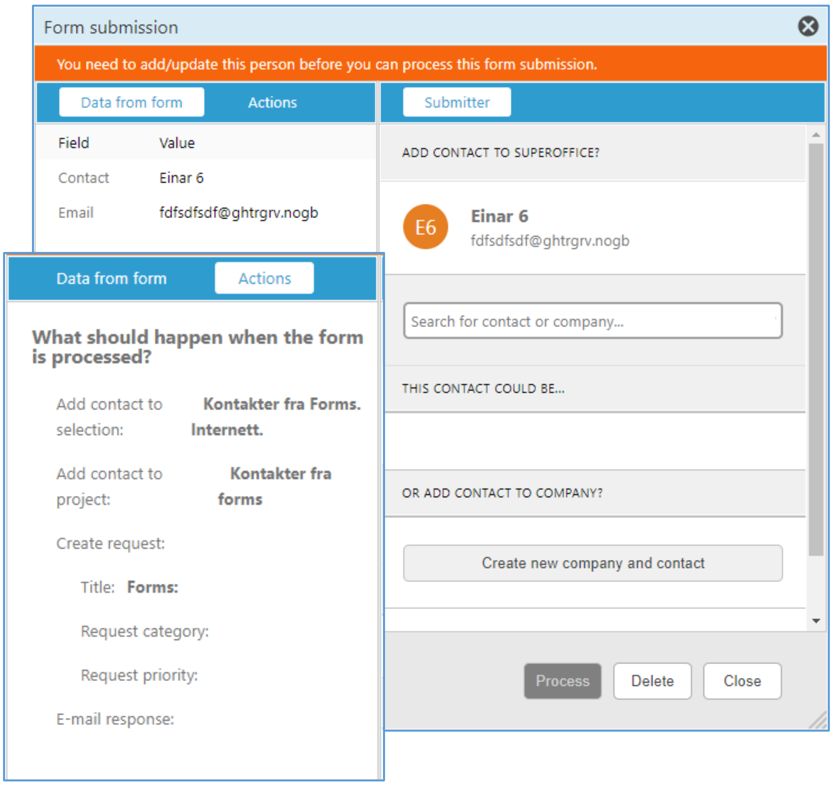
In the **Form** tab there is an overview of existing forms. And to **create** a new form you click the **Form** button.

There are 7 different steps to go thru:

- **Properties**: Select folder for the form, language on lists etc., managed by user group, deactivate by date or max submissions, Google Analytics settings
- **Fields**: Add fields you want the form to contain, chose between SuperOffice elements, Form elements or View elements
- **Style**: Select if form should have rounded corners, field name placement, field border, form border, form and page background, font-family, base font-size, form width and height.
- **Double opt-in**: If selected, you set up the e-mail sent to the submitter when using the form. Used when you want to be 100% sure that submitter owns the e-mail address added.
- **Thank you page**: You can either redirect to an external website or show a message after submitting the form
- **Page for inactive form**: When form has reached max limits or date or set to Inactive, you can redirect to a page or add a message that shows.
- **Actions**: What will happen when a form is submitted? You have option to create request, if a new contact is created automatically, manually only if submitter is unknown or always manually. And what should happen when the form is processed? Add contact to selection, project or interest, send an e-mail or execute a CRMScript.

Form submissions





For all users a new tab has appeared under Marketing.

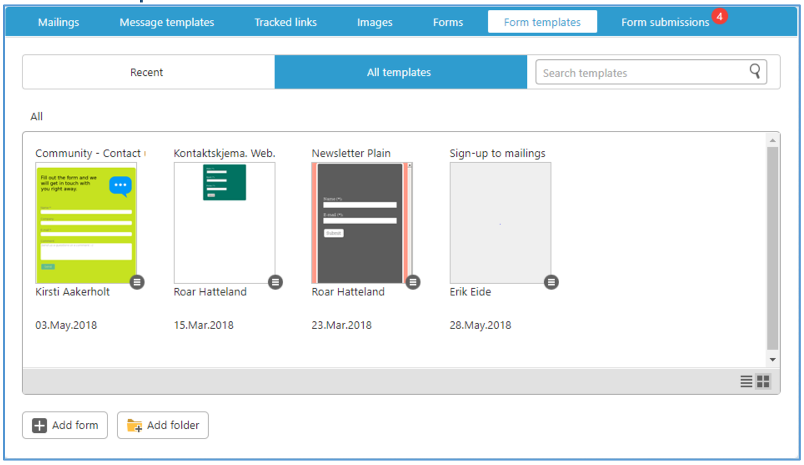
Depending on the user group setting on the form, a notification appears with a number on the tab. This only happens if new submitters have been added and need attention.

It all depends on the settings you have but on the Action of the form. If you av put **Automatically process all submissions**, there will not be any notification for this form.
If you have selected one of the **Manually** ones, you will get notification on all that is not automatically processed.

To process one submitter, simply double click to open the dialog. On the **Submitter** tab find and link the correct person in SuperOffice, and then Click on the Process button. Click on the **Actions** tab in the left section, if you have forgotten what kind of actions that will happen on the contact when the form is processed.

There are different **filters** in the archive footer to hide/show the different form statuses. That makes it easier to just see the submitted but not processed contacts.

Form templates

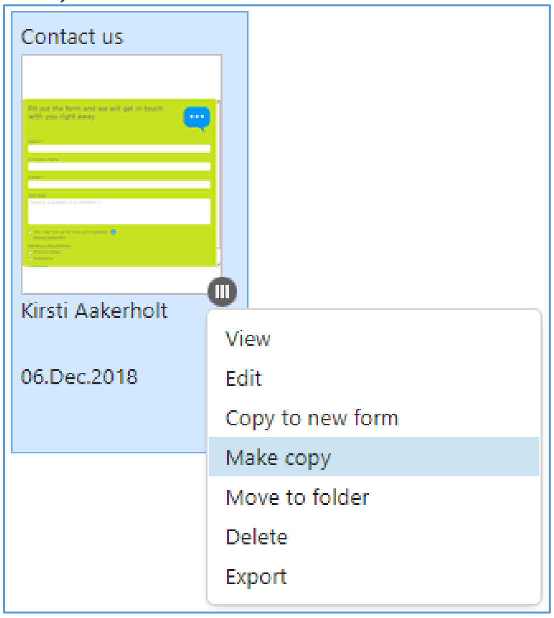


If you have some forms you reuse with a special styling, look and feel or field setup, it is very handy to be able to create **form template**.

You can create a form template from an existing form. Click the **action** button on the form and select **Copy to template**.
Or you can create a form template from the scratch.

To use the form template, simply click the **action** button on the form template and select **Copy to new form**.

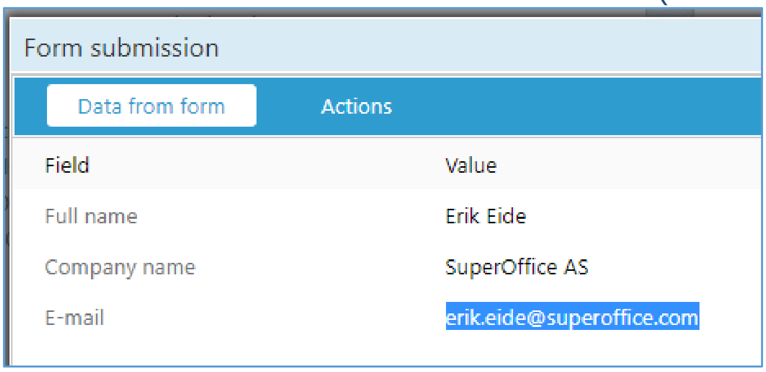
Form templates – Copy a template to a new template (8.4 R04)



You can copy an existing form template to a new **form template**. Click on the **Context menu** button and select **Make copy**, and the form template are copied.

This is nice when you have a good form template, but you want a second slightly different template. So instead of creating the form from scratch, simply copy the one you want and change the new one.

Form submission – Select text from value text (8.4 R04)

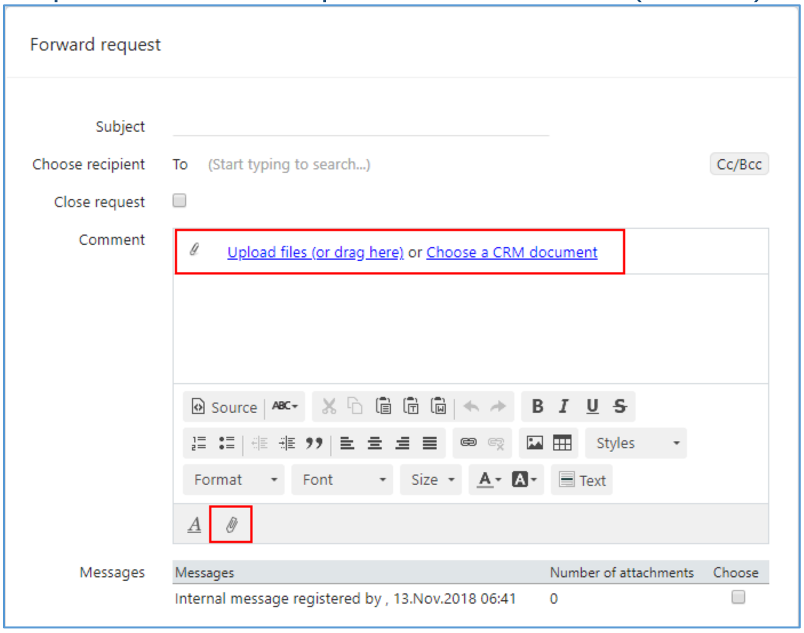


When you have received a **form submission**, it is possible to select the value text visible on the tab **Data from form**. Just open the dialog **Form submission**, either from the **contact** linked to it or from the **Form view** or **Form submission** tab on **Marketing**.

Especially when a text is added that you want to use elsewhere or search for, it is very neat to have the copy text possibility.

New and improved Service

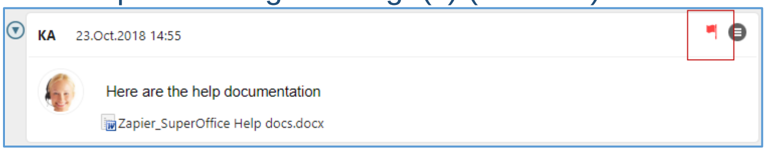
Request – Forward request with attachment (8.4 R02)

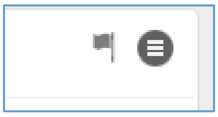


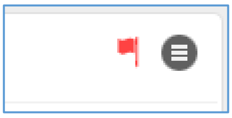
When you **forward** a request, you have possibility to **add files** from **Windows Explorer** or **Choose a CRM** document.

This is a very nice option when you don't want to forward all of the messages, but only some of them, but want to add a file as well.

Edit Request – Flag message(s) (8.4 R03)



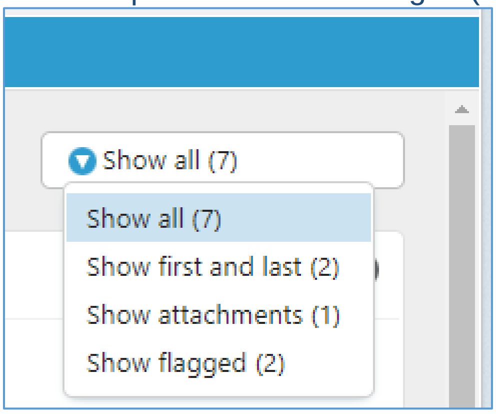




On edit a **request** you can set a **flag on important** messages in a request.

Just click the **flag** on for red and off for grey. Like that when a message is flagged red, it will pop out more when you scroll down a request with a lot of messages.

View Request – Filter messages (8.4 R03)



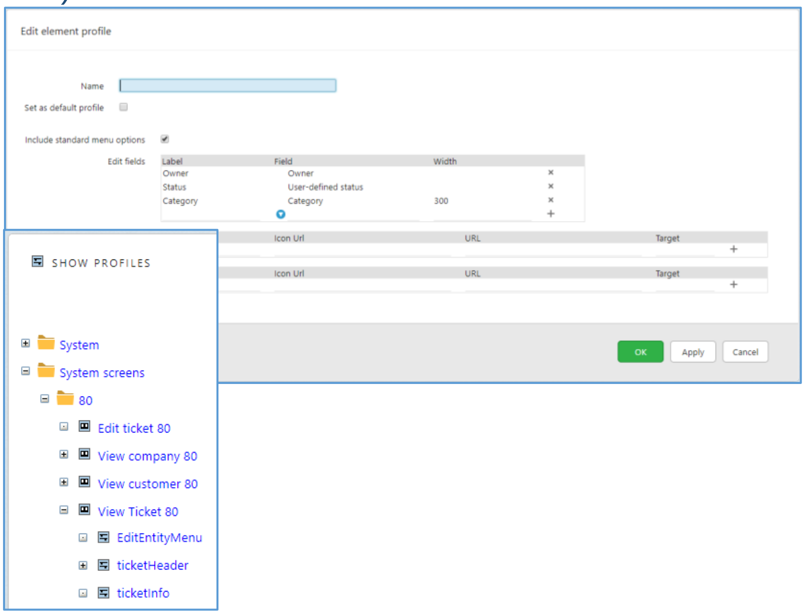
When you **view a request**, you can now view the messages with these **filters**:

- Show all
- Show first and last
- Show attachments
- Show flagged

The number behind the list item indicates how many messages the filter will show.

The filter field is always in top right corner of the Messages tab.

Show Profiles – Add new screen preview to a profile (8.4 R03)

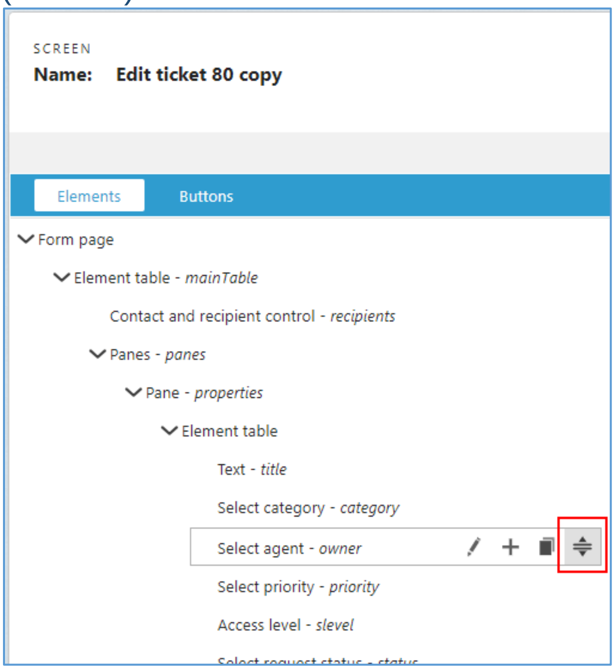


You can use **Profiles** to change which **quick edit fields** are available when viewing e.g. requests or persons.

It is possible to drag and drop the different fields to a different rank/order. You can also remove fields that are not important for you from the standard view.

This also applies for all other views in the **Show profile** screen, so it is possible to change your default profile view. AND when you upgrade your installation, you still have the new default view, you don't need to do it again.

System design – Copy screens and change rank on fields (8.4 R04)

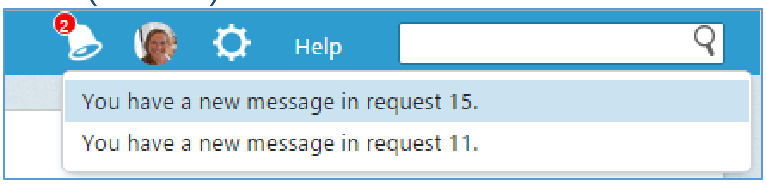


You have created a copy of an existing screen and want to change the rank and fields in the screen.

It's so easy to use the **rank** button to change the rank of the different fields in the different panes of the screen. Just **drag and drop** the field where you want to have it.

To change the field name and simple values, just click the **Edit** button and change what you want.

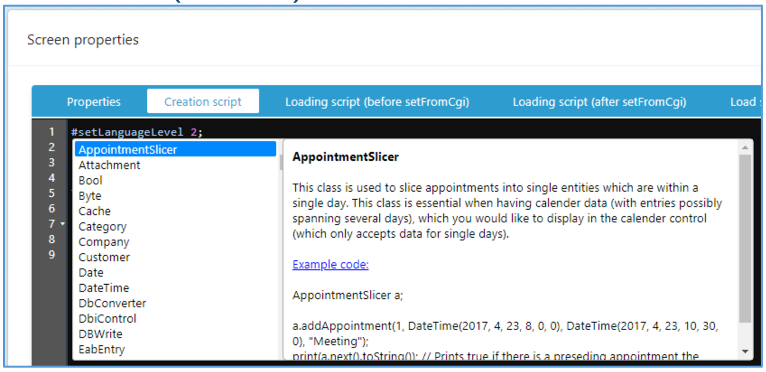
Request – Notification of request created with chat, form or inbox (8.4 R04)



When you create a request from **Form**, **Chat** or **Inbox**, it will respect the user's **notification** settings, and send a notification is configured to do so.

This makes it easier for you, not needing to check manually if a new request is created and set to you.

System settings – Edit screens – CRM Script with Intellisense (8.4 R04)

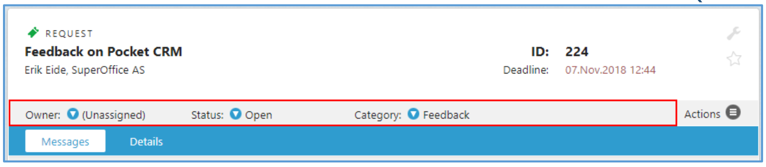


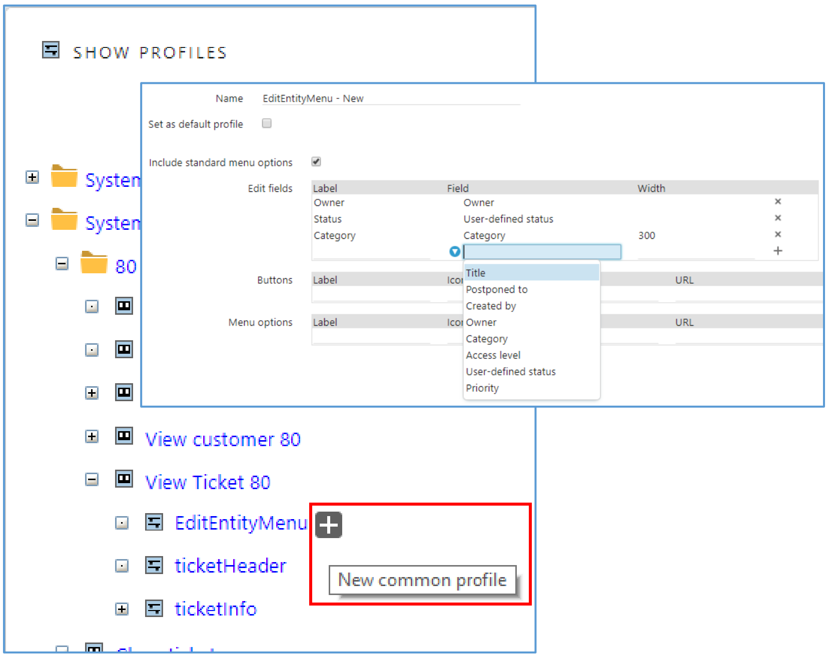
When/If you want to Edit screens, you have an extra help with the **intellisense** function on all tabs.

To get the intellisense function you click **Ctrl+Space** to get the menu to open.

This help you to write better script in the **CRM Script** for the **Screen properties**, a good overview of what you can do and help on the way.

Profiles – Edit the visible fields in the card footer (8.4 R04)



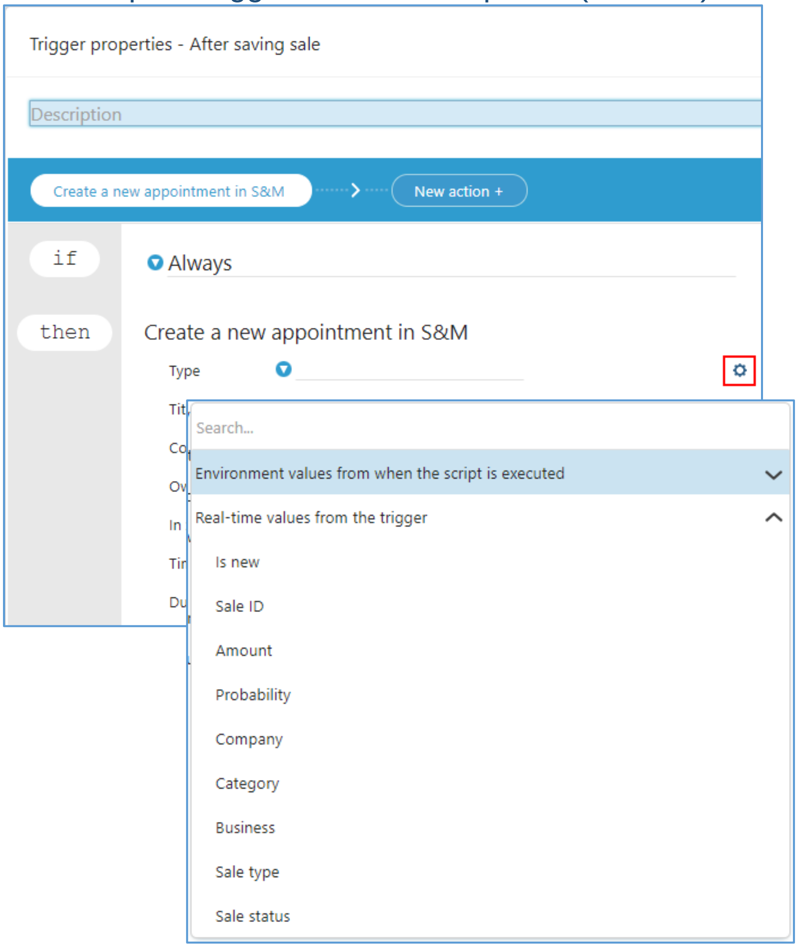


When you have copied an existing screen, you have possibility to change the different fields in the **card footer**.

Like this example, you have copied the screen **Edit entity menu** under **View Request**, and now you can change the rank of the fields and the visible fields in the footer of the Request card.

With this possibility, you can add extra fields or select standard fields that are important to you or to all the users. Like that the screen will be more fine tuned to the needs of the different users and user groups. Easy access to the most used fields.

CRMScript – Triggers with more options (8.4 R04)

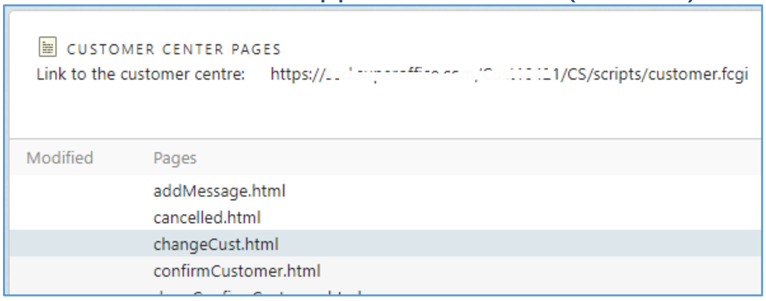


On **CRMScript** and **Triggers**, you can select the properties on the field and select from:

- Environment values from when the script is executed
- Real-time values from the trigger

It's quicker to work with and easier to get it correct.

Customer Center – Support for cookies (8.4 R04)



In the **Customer Center** pages there is support for **cookies**.

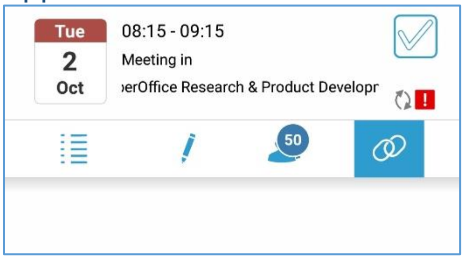
This enables you to choose between storing the session id in a cookie, or in the URLs (default behavior).

New and improved Pocket CRM

Diary – Appointment shows from-to time

When you mark an appointment in the **Day** and **Week** view, you will get the **from time** to the **to time** of the appointment. Easy to see when exactly the meeting starts.

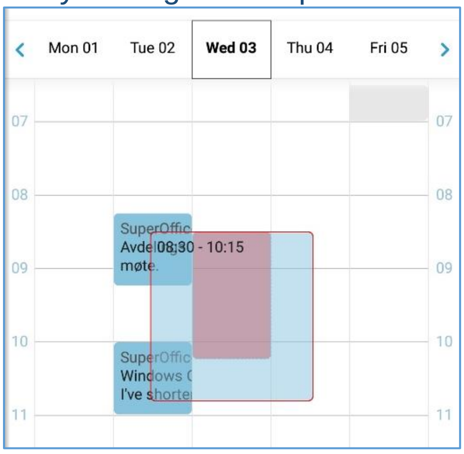
Appointment – Links tab



The Appointment screen shows a tab for **Links**.

If you add a link like a project or url to an appointment, you will find all this in the tab for Links. This is the same Link tab we have in the CRM client, so it shows the same info in all clients.

Diary – Drag and drop to create new appointments

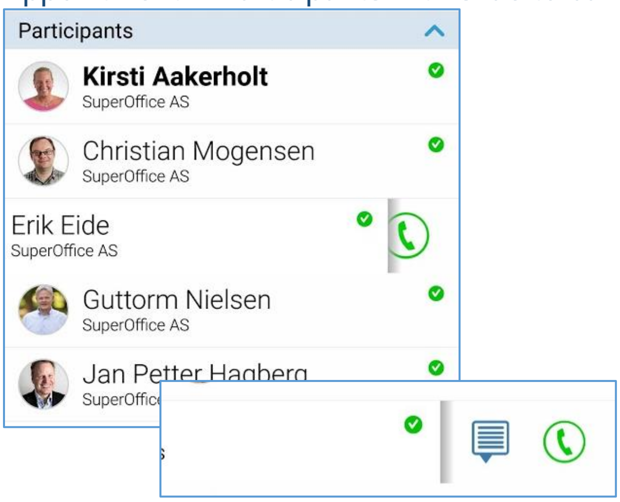


Go to **Day** or **Week** view in the Diary. Select when the meeting should start and **drag** down and release finger to select the to-time

The timer will show the from and to time, so it easy to select the correct time in the **drag and drop** function.

It's also possible to **drag and drop** to move the appointment to another time. Or **drag and move** to add more time to the appointment.

Appointment – Participants with slide to call (8.0.60 R042)



From the Appointment screen and the **Participant** section, just slide one participant to the left and click on the **Call** button.

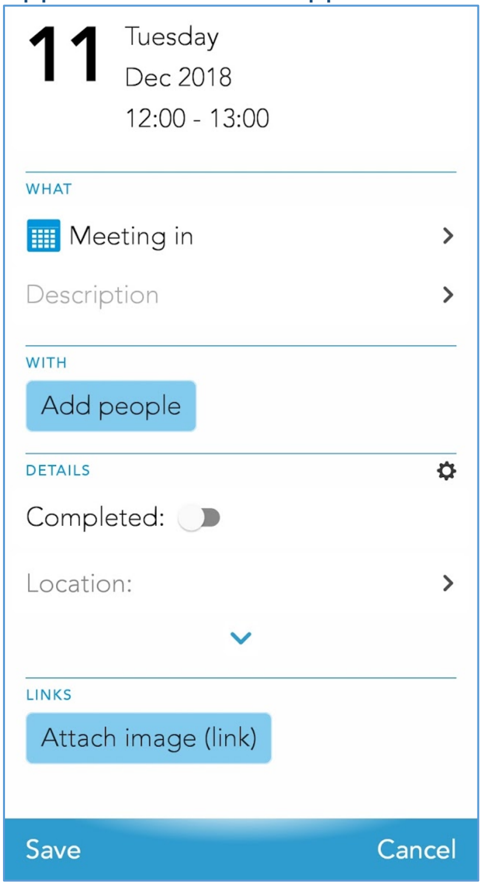
Quick and easy way to call a person.

Appointment – Conflict in the participant list (8.0.61 R043)

When you invite colleagues to a meeting, it’s not always easy to see if the person has a **conflicting** appointment.

In the **participant** list you have an icon that shows if participant has a **conflict**.

Appointment – New appointment screen (8.0.63 R045)

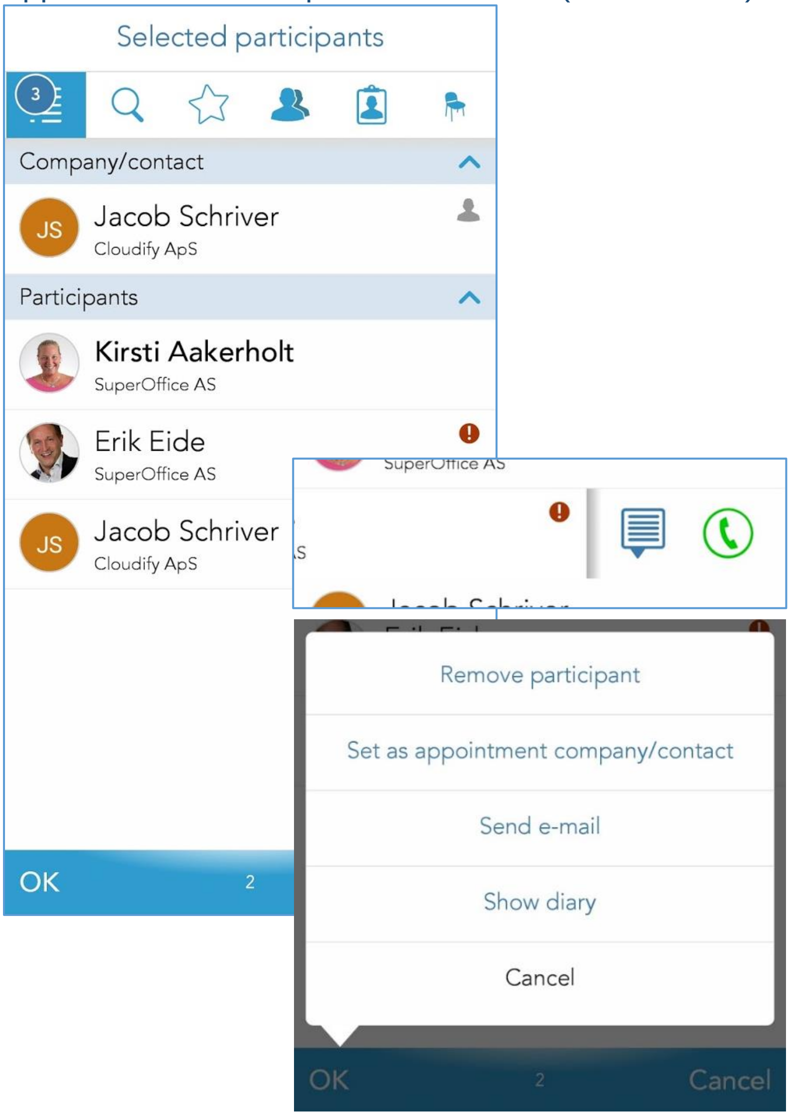


When you create a new appointment, it’s easy find the different sections for:

- When
- What
- With
- Details
- Links

Just start write in the description field and select the right company and contact the meeting is with.

Appointment – Participant list overview (8.0.63 R045)



When you go to **Add people**, you just mark the ones you would like in the meeting. Click again to unselect, if you added a contact wrongly.

The first tab will show the **Selected participant**, so it's easy to get a quick overview to see if all the contacts you want in the meeting are selected.

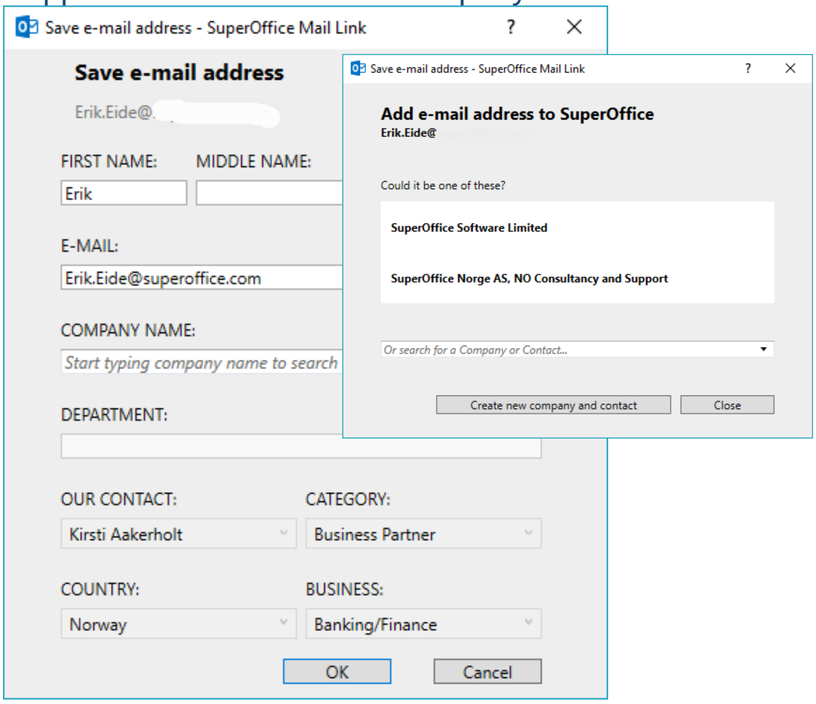
The first one you mark will be the **Company/contact** the appointment is linked to. But that can be changed by swiping on the other participants and select the **Task** menu. There you select the item for Set as appointment company/contact.

You can also easily **Remove participant** to remove the contact from the meeting.

Show diary will only appear on associates and resources, not externals that does not have a diary to show.

New and improved Mail Link

Support of contacts without company



On **MailLink** you can select the **Create new company and contact** button if the address is not in your SuperOffice database.

The Save e-mail address dialog opens and you can fill out the different contact information you have. When clicking OK the dialog will not prompt the Company name before saving, you can now save a **person without a company**.

You can also select the correct Our contact, Country, Category and Business on the contact you want to add, before saving the new contact.