SuperOffice AS

# What's new in SuperOffice 10

SuperOffice AS Updated: 05 December 2022

# SUMMARY OF HIGHLIGHTS

**SuperOffice 10** – a new version of SuperOffice CRM – is now ready to offer you brand new & improved features that are designed to help you turn relationships into revenue.

Adding flexibility are key words for this first release of SuperOffice 10: To start off, this version brings a new price and packaging model that increases the flexibility where customers can choose the products that fit their business best. The new model includes new product names, several editions of our solutions and introduces new addon products.

Furthermore, SuperOffice 10 launches the advanced dashboards feature that expands your ability to customize the dashboard reports, including letting you create different reports to different user groups. In addition, the new Screen designer feature allows you to configure your own main standard screens as well as design the layout of your More tabs. Additional highlights include the introduction of SuperOffice AI which embeds the power of AI into SuperOffice and will help you make better sense of data, automate work processes to save time and reduce manual work.

With the new product packaging, new features, technological and feature improvements and introducing new add-ons, SuperOffice 10 is a solution available today and created for tomorrow's CRM needs.

After your upgrade to SuperOffice 10, there are some changes to note:

- The sorting and placing of your user defined fields will change and automatically presents itself into two columns in the More tab of your solution.
- If you want to revert to the lay-out used to be, we suggest that you document todays lay-out. The easiest way is to take a picture of the More tab.
- If you are not happy with the autogenerated lay-out, you need the new **Screen designer** to adjust it, available as a feature in **Development Tools**.

Details of the new features are outlined in the <u>Welcome to SuperOffice 10</u> article.

Read more about the new features in this release here:

- 10.0.1: Screen designer, Dashboard, Forms
- 10.0.2: Dashboard, Screen designer, Forms, Scripts
- 10.0.3: Dashboard, Screen designer, Chat
- 10.0.4: Dashboard, Mailing, Chat
- 10.0.5: Mailing, Chat, Mobile CRM, APIs
- 10.0.6: Five new UI languages in all modules, Screen designer, Dashboards, Chat (Online and Onsite release)
- 10.0.7: Selection charts, Request administration, Triggers of Approvals
- 10.1.1 Screen designer, APIs
- 10.1.2: Mobile CRM, Apps
- 10.1.3: Form, Chat
- 10.1.4: SharePoint document library, Dashboard/Find/Selection of Mailing/Form/Chat, CRMScript
- 10.1.5: Notification Sale Quote approval, Dashboard, Search on Mobile CRM
- 10.1.6: Sales targets, Configurable archives

- 10.1.8: Quick search
- 10.1.9: CRMScript, Dashboard

### Important notes - Breaking changes in 10.1.x (from 10.0.x)

- Removed ability to install Web client in NetServer Services Remove Mode,
  - Support standalone only (Local Mode)
  - Support NetServer web services (for Service)
- NetServer requires startup bootstrap prior to API invocations.
- Removed LanguageInfoCache
- Changed ImpersonationContext
- Removed CacheBase, all caches to inherit new CacheBaseV2
- Modern authentication (OAuth 2.0) against SuperOffice Inbox and Service mailboxes over IMAP (Microsoft 365 only)

The possibility to have mixed logins was removed in SuperOffice **10.1.5**. But reimplemented in version **10.1.6** (05.10.2022), due to a lot of unexpected problems. Read the full overview in our <u>Help Center &</u> <u>Community</u> in the forum.

### CONTENTS

SUMMARY OF HIGHLIGHTS	2
Important notes - Breaking changes in 10.1.x (from 10.0.x)	3
CONTENTS	4
New and improved CRM Core features	8
Dashboard – Improved functionality (10.0.1)	8
Dashboard – Change rank on tabs (10.0.2)	10
Dashboard – Duplicate tile within a dashboard (10.0.2)	11
Dashboard – Hide currency info (10.0.2)	11
Dashboard – Tiles for Web panel and HTML text and images (10.0.2)	12
Dashboard – Old dashboard with read mode on tile (10.0.2)	13
Dashboard – Preview in navigator (10.0.3)	13
Dashboard – Full screen with tasks (10.0.3)	14
Dashboard – Donut tile with totals (10.0.3)	14
Dashboard – Tooltip on title (10.0.3)	14
Dashboard – List tile with image preview (10.0.3)	15
Dashboard – Warning when changing tile name when multiple languages (10.0.3)	15
Company and Contact – Copy to clipboard button on phone, e-mail and url (10.0.3)	16
Dashboard – Navigation preview with own dashboards (10.0.4)	16
Dashboard – Line charts with spline/soft line (10.0.6)	17
Languages – 5 new UI languages on all modules (10.0.6)	17
Selection – New chart types in the Online template library (10.0.7)	
Dashboard – Chat, Form and Mailing as tile entities (10.1.4)	19
Find and selection – Chat, Form and Mailing as entities with typical searches (10.1.4)	19
Settings and maintenance link from Sales opens new tab (10.1.3)	20
Sale – Quote approval and notification in Mobile CRM (10.1.5)	20
Dashboard – Preview of criteria (10.1.5)	21
Dashboard – Copy a tile to a different dashboard (10.1.5)	21
Dashboard – Big number tile with short number (10.1.5)	22
Company and Contact – Note with date and time stamp (10.1.6)	22
Sale – Sales targets (10.1.6)	23
Quick Search – Navigator search and Freetext search (10.1.8)	
Sale – Sales target type (10.1.9)	25
Activities – Filter for all types (10.1.9)	25

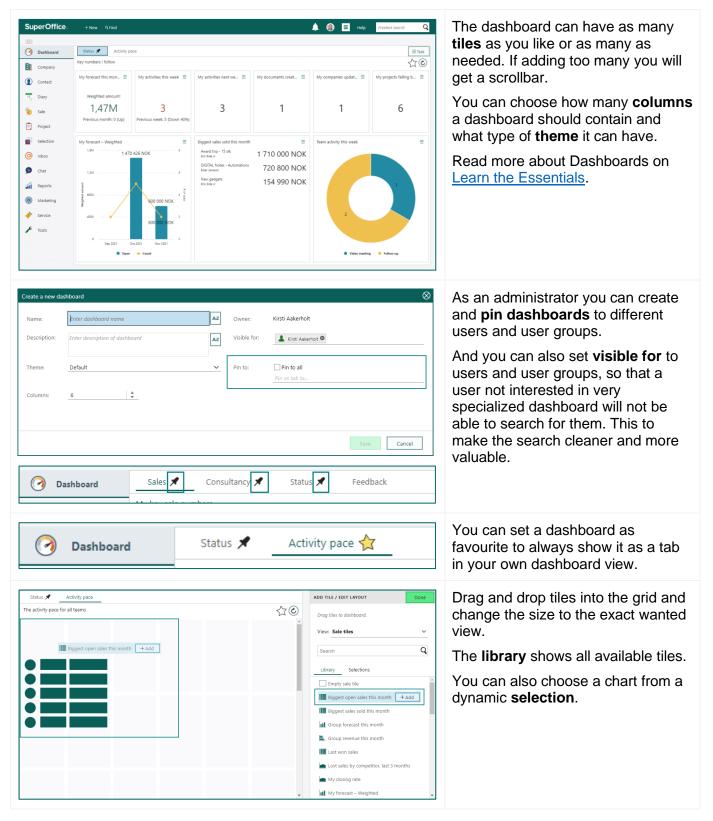
Dashboard – Duration on Follow-up tiles (10.1.9)	26
Find and selection – None of the interest (10.1.9)	26
New and improved Settings and maintenance	27
Screen designer – New functionality for configurable screens (10.0.1)	27
User defined fields – Remove of field placement (10.0.1)	28
Users – New user plans (10.0.1)	28
Screen designer – Use ERP fields as a block (10.0.2)	29
Screen designer – Settings on fields (10.0.3)	29
Screen designer – Info for last published by and date (10.0.3)	30
Screen designer – Custom buttons with tooltip (10.0.3)	30
CRMScript – Intellisense experience (10.0.3)	30
Document list – Template variable for semi long date (10.0.4)	31
Import – Gmail import of contacts (10.0.6)	31
Screen designer – Address field in expanded or one line mode (10.0.6)	31
Security improvements – Credentials and checks (10.0.6)	32
Languages – 5 new UI languages on all modules (10.0.6)	33
Request administration – Re-organized screens (10.0.7)	33
Triggers – Quote approval triggers (10.0.7)	34
Subscription management – Subscription form page with Powered by SuperOffice (10.0.7)	34
Screen designer – Add Macro as button in CRM (10.1.1)	35
Options – Add Customer languages from Settings and maintenance (10.1.1)	35
Settings and maintenance link from Sales opens new tab (10.1.3)	35
Lists – GUI Web panel with reload settings (10.1.5)	36
Screen designer – Configurable archives/section tabs (10.1.6)	36
CRMScript – Script triggered custom dialogue (10.1.9)	37
New and improved Customer Engagement Platform	39
Chat – Warning on new chat message (10.0.2)	39
Chat – Customer can create request if long queue (10.0.3)	39
Chat – When in queue keep writing a message (10.0.4)	40
Chat – Rating on a chat from the customer (10.0.5)	40
Chat – Better use of small screens like a mobile (10.0.6)	41
Languages – 5 new UI languages on all modules (10.0.6)	41
Chat – Configuration options for styling chat widget (10.1.3)	42
Chat – Allow file upload in chat for the customer (10.1.5)	42
New and improved Marketing	43

Mailing – Add video in content of the mailing (10.0.4)	. 43
Mailing – Social bar with Xing and other generic web pages (10.0.5)	. 44
Mailing – Recover unsaved changes (10.0.5)	
Languages – 5 new UI languages on all modules (10.0.6)	. 45
Form – Set up Our contact with a default on form submissions (10.1.3)	. 46
Mailing – Document mailing with language (10.1.6)	
New and improved Service	. 47
Forms – Publish options (10.0.1)	. 47
CRMScript – Tracing of scripts (10.1.4)	. 48
New and improved SuperOffice Mobile CRM	. 49
Mobile CRM – Dashboard support (10.1.4)	. 49
Scripts – Support of scripts in Mobile CRM (10.1.5)	. 49
Company – Show stop on Company (10.1.7)	. 50
Request – Add multiple images to a request (10.1.7)	. 50
Diary – Diary with drag & drop (10.1.8)	. 51
Languages – 5 new UI languages on all modules (10.1.8)	
CallerID – Identify your calls with Mobile CRM (10.1.9)	. 53
Notifications – Request notifications (10.1.9)	. 54
Notifications – Notifications for Sale Quote approval (10.2.2)	. 55
Search – Search for anything (10.2.2)	. 56
New and improved Office integrations	. 57
Languages – 5 new UI languages on all modules (10.0.6)	. 57
Document library – SharePoint integration (10.1.4)	. 57
API changes	. 58
API – New license structure (10.0.1)	. 58
API – Webhooks sent for Bulk update changes (10.0.5)	. 58
API – SuperOffice.WebApi Agent with better testability (10.0.6)	. 58
API – TicketAgent new method (10.0.6)	. 58
API – Support for RSA Signature with SHA-256 in CRMscript (10.1.1)	. 59
API – Add exception message in JSON response (10.1.1)	. 59
API – WebApi client to use interfaces (10.1.1)	. 59
API – Lookups based on Name if the id is 0 (10.1.1)	. 60
API – Breaking changes on Web.Api (10.1.3)	. 60
API – CRMScript (10.1.4)	. 61
API – Quote Connector for Approval/Rejection (10.1.5)	. 61

API – Update overview (10.1.9)	61
Developer Products	
AI Services – New functionality (10.0.1)	
AI Services – In production (10.1.2)	
SuperOffice App Store	63
Monitor Quote by Keyforce AS (09.09.2021)	63
HoltePortalen by Holte AS (15.09.2021)	63
SuperOffice for Mailchimp by SuperOffice InfoBridge B.V. (05.10.2021)	63
SuperOffice for Microsoft Teams by SuperOffice InfoBridge B.V. (05.10.2021)	64
SuperOffice for Slack by SuperOffice InfoBridge B.V. (05.10.2021)	64
SuperOffice for Trello by SuperOffice InfoBridge B.V. (05.10.2021)	64
SuperOffice for WordPress by SuperOffice InfoBridge B.V. (05.10.2021)	65
Echobot connect by SP softwarepartner GmbH (05.10.2021)	65
Leadinfo by Leadinfo (05.10.2021)	65
SuperOffice for WebEx by SuperOffice InfoBridge B.V. (16.12.2021)	
Visma Fenistra sync by Keyforce AS (06.12.2021)	
Xledger quote by Keyforce AS (02.12.2021)	
Bisnode RiskGuardian for SuperOffice by i-Centrum AB (08.02.2022)	67
Uni Economy Sync by Keyforce AS (28.01.2022)	67
Sparebank 1 Regnskap sync by Keyforce AS (03.05.2022)	
DNB regnskap sync by Keyforce AS (03.05.2022)	68

# New and improved CRM Core features

Dashboard – Improved functionality (10.0.1)

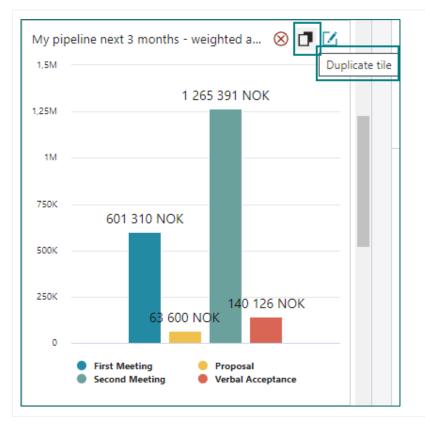


Edit tile            My forecast - weighted          Dataset       Layout          =          Owner          Current user          Kirsti Aakerholt          =          Sale date          This, previo,          Month          01.09,2021 - 30,11,2021          =          Sale date          Is one of           Sold          + Add          Or           Save	Change the <b>Dataset</b> behind the tile, just use criteria to get the exact data you want. Changing this dataset will only change it on this tile, not on existing dashboards or new ones.
X-axis label: Title AZ Y-axis label: Title AZ	

Oashboard     ad     ad     Activity pace     Status	Status ★ Activity pa numbers I follow y forecast this mon Weighted amount:	ce My act	You can <b>search</b> for dashboards that either you or your colleagues have made. NB! Your favourites dashboard will always be shown as a tab in your dashboard view.
Sales and Activites	1,47M		
Activity pace Old dashboard	Previous month: 0 (Up)	Previou	
O Dashboard	Status 🗶 Activity pa		You still have access to your <b>Old</b> <b>dashboard</b> s. This is mainly to be able to recreate your old dashboards in the new
	y forecast this mon ≡	My act	layout. You cannot edit them anymore, only view.
Activity pace Status	Weighted amount:		
Sales and Activites Activity pace	1,47M		
Old dashboard	Previous month: 0 (Up)	Previou	

## Dashboard – Change rank on tabs (10.0.2)

O Dashboard	Status Status Sales numbers	Activity pace 🟠	You can change the <b>rank</b> of the <b>tab</b> in the Dashboard screen, just <b>drag</b> <b>&amp; drop</b> the tab on wanted placement.
			This makes the Dashboard work better for you, as a user, so the most important tabs shows where you want them to be.



### Dashboard – Duplicate tile within a dashboard (10.0.2)

If you are happy with one tile in a dashboard, and you want to reuse most of the settings, you can select the button **Duplicate tile** on the tile and make the changes you like.

Like that you can reuse the settings of a tile. Change the dataset to show same type of data for example for another group, or use a different group the tile layout.

### Dashboard – Hide currency info (10.0.2)

Edit tile		
🇞 My pipe	line next 3 months - weighted amo	unt
Dataset	Layout	
Chart type:	III Column chart	$\mathbf{v}$
Measure:	Sum	$\sim$
Of:	🕲 Weighted amount	$\checkmark$
Currency:	Own (NOK) 🗸 Hide	e: 🔽
By:	🕲 Stage	$\sim$
Grouping:	None	
	O Stack by	
	<ul> <li>Group by</li> </ul>	
	Compare to period	

On some tiles the currency takes up a lot of space.

When you do not want to show the currency inside the tile, simply check **ON** the **Hide** currency.

### Dashboard – Tiles for Web panel and HTML text and images (10.0.2)

ADD TILE / EDIT LAYOUT	Done
Drag tiles to dashboard.	
Show tiles for: Other	~
Search	Q
Library Selections	
₩eb panel	
Edit tile	[] & [] &
Properties	
URL: https://www.x-rates.com/table Allow insecure address:	Web panel  RATES  EURO EXCHANGE RATES TABLE  Converter  Top 10 Oct 27, 2021 08 54 UTC Euro 1.00 EUR INV.1.00
	Save Cancel
Edit tile	[] () [] () [] ()
Properties	
Language:	Currency information (HTML)
English	The Currency rates are updated daily and gives us a good indication on what our earnings are.
+ Add × Delete	A
	Save Cancel

You can add a **Web panel** or **HTML** as a tile in your dashboard.

That opens up a lot of possibilities, both to style it and to show information not just inside SuperOffice CRM.

As for **Web panel tile** – you add an url you want to show, and drag & drop the tile where you like on the dashboard.

Using the **HTML tile**, you can add text in all our languages, like an explanation to the dashboard or a tile. You have the same formatting option for text as you have for Chats and Forms.

### Dashboard – Old dashboard with read mode on tile (10.0.2)

Tile name:	My Pipeline - weighted a	amount	Ą	
Description:	My open sales with sale date until the end of this month, stacked by due date (on track, overdue), grouped by sale stage. Showing sale amount weighted by probability.			
Showing:	Sale			
Chart:	Pipeline -	weighted amount		
Datasource:	Use default - My op	en sales		
	Period:	This month and before		
	Show sales for:	Me		
	Selection			
Tile options:	Show table in expande	d view: 🗹		
	Currency:	Amount in own currency		
Visible for:	All			

### On the Old dashboard, you probably have some tiles your really would like to recreate in our new Dashboard.

To do so, you have the option to Click on **Old dashboard** and the wanted tile, go to **Edit** and you have the **read mode** of the tile to see the different settings and selections you have used for the tile.

With that information you can now create a new tile in the new dashboard.

As a suggestion, you can take a screendump, to easier compare settings for the new tile in the new dashboard and the screendump from the old dashboard.

### Dashboard - Preview in navigator (10.0.3)

When using the **navigator** to find SuperOffice. +New QFind dashboards, you get a preview of l← the dashboard. 🔗 Dashboard Company Interests More Note Yel It will give you a better indication on 🔗 Status what the dashboard will contain and Key numbers I follow 0 Q if it was the one you wanted. Created: 30.09.2021 Sales numbers The information in the preview is Activity pace 3 My forecast this month Status name, description, when 123 My activities this week 123 My activities next week created/updated and what tiles it 133 My documents created this week 33 My companies updated this week contains. 🚟 My projects falling behind <table-of-contents> My forecast – Weighted Biggest sales sold this month 🧶 Team activity this week Old dashboard

### Dashboard – Full screen with tasks (10.0.3)

2M		1 865 39	1 NOK	5	Download PDF document	
1,5M				4	Download PNG document Print	
		Nov 2021 • Count: 3	NOK			
1M		1 865 39	1 NOK	a ales		
500K				2		
	205 036 NOK 205 036 NOK					
0	Oct 2021	Nov 20	021	1		
	•	Open Count				
		Chart				
Cate	gory	Open	Count			
Oct	2021	205036		4		
Nov	2021	1865391		3		

When you **view a tile in full screen**, you can change the **window size** in the bottom right corner.

And you can select different **tasks** for the tile.

- Download PDF document
- Download PNG document
- Print

### Dashboard – Donut tile with totals (10.0.3)

dit tile	r of sales by source, last 3 months		Use the <b>pie chart</b> on the tile, will give you an extra settting for the pie
Dataset	Layout		<ul><li>Pie</li></ul>
	Pie chart ¥	Number of sales by source, last 3 months	Donut
Measure:	Count V		Donat
Of: By:	© Sale ID ✓ © Source ✓		<ul> <li>Donut with total</li> </ul>
Formatting Title: Legend: Labels: Sort by:	Title AZ Below ✓ Number ✓ Value ✓ 1₫ JE	2 6 4	• Semi-circle Selection <b>Donut with total</b> , you will get the total amount or count in the
Pie layout	Donut with total  Pie Donut Donut with total	Recommendation     Web site	middle of the donut.
	Semi-circle	Save Cancel	

Dashboard – Tooltip on title (10.0.3)



### Dashboard – List tile with image preview (10.0.3)

Dataset	Layout		
hart type:	📕 List 🗸 🗸	Largest deals sold this month	
leasure:	Sum 🗸	Watches for 25 years of emplo	
of:	C Amount V	Erik Eide Jr	379 952 NOK
urrency:	Base (NOK) V Hide:	Rolex for the girls Erik Eide Jr	342 500 NOK
y:	🕲 Sale ID 🛛 🗸		512 500 1101
ormatting		Giveaways for Expander World Erik Eide Jr	258 000 NOK
leading:	🕲 Sale name 🛛 🗸	Plants: Gold	100 500 NOK
ubheading:	🗞 Owner - Full name 🛛 🗸 🗸	Ester Jansson	
abels:	Number 🗸		
ort by:	Value ✓ 🖬 🐙		
ist items:	5		
nage type:	(none) 🗸		
	(1.1.1.1)		
	(none)		

Using **list tiles**, you get a list of items that shows with big numbers and info about the entity.

You can select in the **Image type** if also an image can be shown. So either show the **entity icon**, like sale, activity, document, company, etc, or show the **person image** for the user owning the entity.

### Dashboard – Warning when changing tile name when multiple languages (10.0.3)

Edit tile [] &	The title on the tile can be translated to wanted <b>languages</b> .
Dataset Layout	When changing the title it's easy to forget to also update each language that are added.
	The <b>warning</b> show on the language button as soon as you change the title and there are other languages added.
	PS! This warning info also shows on some other places we have the language button.

Company and Contact – Copy to clipboard button on phone, e-mail and url (10.0.3)



In SuperOffice there are some information that is very handy to be able to easily copy. Like phone numbers, e-mail addresses and web sites.

By mouse over the field, you get the **copy** icon and clicking will give a message that the information was **copied to clipboard**.

Copied to clipboard	
[] <del>←</del>	
🔗 Dashboard	Company

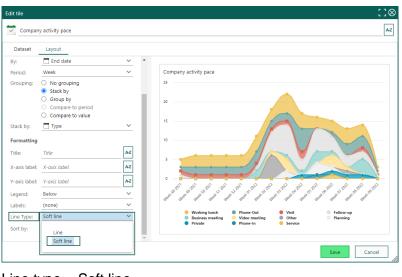
### Dashboard – Navigation preview with own dashboards (10.0.4)

SuperOffice.	+ New Q Find
[	
O Dashboard	Status 🖈 🛛 Activity pace
6 <b>()</b> Q	Overview of all activities and other for me and my group
Activity pace	Owner: Kristine Anfield
	Created: 15.12.2021
	Tiles: 123 My forecast this month
	My activity pace
	323 My activities this week
	123 My activities next week
	<sup>123</sup> <sub>456</sub> My documents created this week
	Biggest sales sold this month
	🧔 Team activity this week
	123 My overdue activities
	📶 Documents from my group
	ill Requests by customer category
	123 Unresolved requests
	📶 Active projects for my team
Old dashboard	M Active projects for my team2
Service	0

When you have created a lot of different dashboards, and some is either not pinned or set as favourites, it's hard to remember what you called them.

On the **navigation** for Dashboard, you have a section for **Own dashboards**, and of course, selecting that will show your own dashboards.

It's easy to navigate and easy to update the different dashboards if you want.



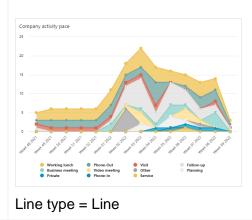
### Dashboard – Line charts with spline/soft line (10.0.6)

Line type = Soft line

On **charts** that includes a **line**, you have an option on the line type to choose:

- Line
- Soft line

The **soft line** (spline) will show the line with a softer change, compared to the **line** option.



### Languages – 5 new UI languages on all modules (10.0.6)

Active language:	English	~
Number and date format	Čeština	<b>^</b>
E-mail client:	Dansk	
	Deutsch	
	Deutsch (Schweiz)	
	English	
	Español	
	Français	
	Italiano	▼ <sup>iel</sup>
Portuguës (Brasil)		
Suomi		
ivenska		
iếng Việt		
усский		
/країнська		
한국어		

The User interface for all our SuperOffice modules there is 5 new languages to choose from:

Language	SO code	LCID string
Vietnamese	VI	vi-vn
Korean	КО	ko-kr
Portuguese - Brazil	BR	pt-br
Chinese simplified	CN	zh-cn
Deutsch - Swiss	СН	de-ch

We did have Chinese before, but now it's in not just Sales module, but also Marketing, Service, Settings and maintenance, Mobile CRM, Outlook Mail link, Gmail link and SuperOffice for Outlook.

The help for Deutsch – Swiss will go to the Deutsch help.

The help for the other languages will go to the default English help.

### SuperOffice. 🍳 🕘 🗏 Help Freetext search 🔍 + New 9 Find O Dashboard DYNAMIC SELECTION OF COMPAN Eriks favorite customers €⊖☆ ÷.... Company Company/contact Criteria Details Charts Contact Company/i Dynamic Ad-hoc list q Select a chart or Search Diary 🔶 Requests 21.01.2022 Erik Eide Jr 26.08.2020 Erik Eide Jr 🐌 Sale Project Selectio Inbox 👂 Chat Reports Marketing I Service 🗲 Tools 📔 🛛 Business An Contacts by our The World Wi

Selection – New chart types in the Online template library (10.0.7)

In the Charts tab on Selection you can visualize the selection members in different ways.

With the all the different **charts type**, you can fine tune the look when selecting the wanted chart.



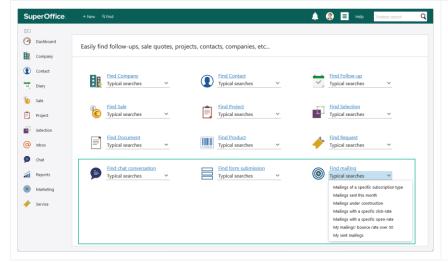
### Dashboard – Chat, Form and Mailing as tile entities (10.1.4)

Mailings, Forms and Chat are used to initiate and drive communication with leads and customers, and you have been able to follow the performance on an individual mailing or form.

With dashboards for **mailings**, **form submissions** and **chat** you can follow performance, trends and productivity across all marketing activities. And you get a great overview and pointers on how well the different sections are doing.

Use the different **standard tiles** to set up your dashboards and tweak them with correct data set and layout.

### Find and selection - Chat, Form and Mailing as entities with typical searches (10.1.4)



In **Find** you have a lot of different **Typical searches** that is a great starting point for a good and usefull selection.

With the options to search for **Chat**, **Form subission** and **Mailing**, you can get a better overview of how you use your system og what you can improve on.

SuperOffice® CRM $\leftarrow \rightarrow \mathbb{C}$	× + ○ A a <sup>es</sup> https://sod.superoffice.com/	/default.aspx?dashboard2	ដ ជ ខេះ
SuperOffice.	+ New Q Find		🙏 🛞 🔳 Help Freetext search 🔾
Dashboard     Company	The Dashboard that gives you a complete overview of a		Other applications Download > SuperOffice App Store Copy shortcut
Contact     Diary     Sale	Top performing mailings this year     Ξ       Image: Cuttomer feedback Anna Brown     100       Image: Cuttomer feedback Anna Brown     83       Image: Cuttomer feedback Anna Brown     83	Average open ra  Average cick-thr Shown in % across all mailings 30 21	Duplicate settings         >           Filter
Project	Invitation to seminar spring     50       Abgat Hat     50       (๑)     Customer seminar Autumn 2015 te     29       Recipients by subscription type YTD     Ξ	Average click-through-rate by subscription t	Targets Edit-system-signature Settings and maintenance
inbox	ao59	20 66 %	0 5 10 15 20 25 30
Cha Supert Supert G Rep ← → C	Office® CRM × SuperOffice® CRM >	+ /admin/default.aspx?adminroles.adminaddro	= □ ×
Mar SuperO		,	Contact support 🥘 🗏 Help
Sen 🗈 Licences	Associates		
Users  Users  Roles  Privacy	User level 0 User level 1 User level 2 User level 3 User level 4	<b>User level 0</b> Administrator: Has full access to	o all data. Can maintain all aspects of the system

Settings and maintenance link from Sales opens new tab (10.1.3)

From the Sales module you have access to Settings and maintenace in the **Main menu**.

When selecting the menu item you will open a **new tab** for Settings and maintenance and can continue to work in the Sales module.

### Sale – Quote approval and notification in Mobile CRM (10.1.5)

Discounted price is lower th	an normitted minimu	marica
Send approval request to		mprice.
Send approval request to Comment	Technical Administration Marketing Sales Services RnD	Autore approval is pending Discounted price is lower than permitted minimum price. Comment: Our competitor are beating us on price here. We need to give 25% to land this. Approve Deny C C NOK 612,825.00 - 23/08/2022 Manchester City FanClub Nonway New watches to most engaged fans C C C C C C C C C C C C C C C C C C C

When working with sales and quotes, you sometimes add a higher discount rate that is wanted, and you need someone else to approve the sale.

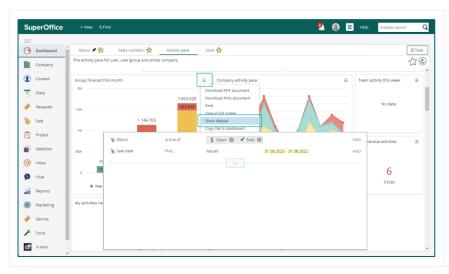
You send the **quote approval request** to your manager or another employee. If that person use Mobile CRM, he/she gets a notifiction about this approval in the app, and it's easy for them to **approve** or **deny** the approval.

You, as the sales owner, get a notification about the approval, if it was approved or denied, in your own Mobile CRM app. Like that, it takes less time for the sale to get going and you can send out the quote if approved, or changed the discount if denied.

See more on the Mobile CRM section: Notifications – Notifications for Sale Quote approval (10.2.2).

This feature requires SuperOffice CRM v10.1.5 or newer and Mobile CRM v10.2.2 or newer.

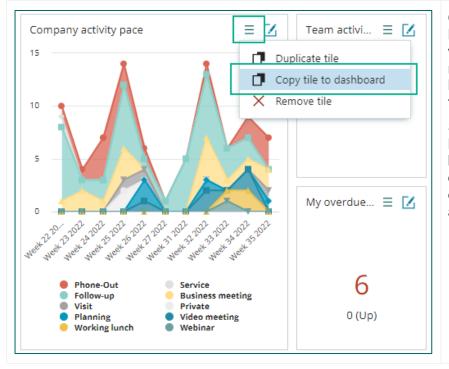
### Dashboard – Preview of criteria (10.1.5)



Have you sometimes wondered about the criteria or dataset behind a dashboard tile?

Click the **Task** menu and select **Show dataset** to see the different criteria used on the tile.





Creating tiles can sometimes be a little time consuming. And if you want that same tile to appear on multiple dashboards, its very neat to have the option to copy the finished tile to a different dashboard.

Simply finetune your tile to wanted layout and dataset, click the **Task** button and select **Copy tile to dashboard** and select the other dashboard you want the tile to appear.

Footer: O	-	-	My forecast this month
Df: 🤶 Footer: O	Weighted amount	-	
Footer: O			
0	None		
0	Compare to value Compare to period Compare to target		
Period: Pr	evious year 🗸 🗸		Weighted amount:
	eighted amount: Az	] [	2,07M Previous year: 20 250 (Up 10117%)
Difference: Style: Positive: Neutral: = F	Integer Decimal Short revious year		

### Dashboard – Big number tile with short number (10.1.5)

Using the tile for **big number** is very visual to see the actual amount or number of a certain entity.

But if the company have very large numbers to display here, it's sometimes hard to read the number and also have space to the whole number.

Use on **Format** the **Short** number, and you get the number in millions. It don't take that much space and easier to read and compare to other numbers.

### Company and Contact – Note with date and time stamp (10.1.6)



Targets							[]⊗
ll Sales							
Select year: 2022	~						
1			•				
Q			$\leq$	$\frown$			
		-	$\geq$	$\leq$			
<ul> <li>Company targe</li> <li>Sales</li> </ul>	2t			2			
Sales glo	bal	rea	ted yet. Starl	t by adding yo	ur team.		
Services				rights to see			
🔏 Technica	ıl						
Administ	0						
Administ	ration						
+ Add groups and	users Creat	te targets for	your teams a	and their men	bers to track	their progre	255.
≡Task				Save	Save ar	nd close	Close
Targets							::⊗
S All Sales							+ Add new target type
Select year: 2022 V						FI	reetext search Q
9,9	Jan 2022	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 202	Sum
Global Media	7 437 500	7 437 500	7 437 500	7 437 500	7 437 500	7 437 50 -	89 812 500 🔓 📃 🕯
✓ Sales	4 612 500	4 612 500	4 612 500	4 612 500	4 612 500	4 612 50 =	55 350 000 🔓 🚍
IIA	4 887 649	4 825 149	4 798 905	3 217 652	4 887 656	4 937 64 =	54 140 530
Abigail Elizabeth Harding Chris Turner	362 500	362 500	362 500	262 500	362 500	362 50 =	4 050 000 G =
Hermione Hester	351 000	351 000	353 000	253 000	351 000	351 00 -	3 912 000 G =
John Doe	347 500	347 500	347 500	247 500	347 500	347 50 -	3 870 000 6 🚍
Kirsti Anfield	0	0	0	0	0		
					0	-	∘ 6 ≡ .
	4				0	•	∘ 6 ≡ .
	ate targets for your teams	and their members to	o track their progress		0		
+ Add groups and users Crea		and their members ti	o track their progress		5	iave Save an	
		and their members to	o track their progress		S		
	ate targets for your teams	and their members to	o track their progress		5		
E Task ● Set annual a	ate targets for your teams		]		05		
∃Task	ate targets for your teams	and their members to	]		5		
E Task ● Set annual a Q	ate targets for your teams		]				
<ul> <li>E Task</li> <li>Set annual a</li> <li>O</li> <li>Copy from</li> </ul>	mount						
<ul> <li>E Task</li> <li>Set annual a</li> <li>O</li> <li>Copy from</li> </ul>	ate targets for your teams	\$			5		
<ul> <li>Set annual a</li> <li>Copy from Abigail Elizat</li> </ul>	mount	\$		-	5		
<ul> <li>Set annual a</li> <li>Copy from Abigail Elizat</li> <li>Copy from la</li> </ul>	mount Deth Harding	\$			5		
<ul> <li>Set annual a</li> <li>Copy from Abigail Elizat</li> </ul>	mount	\$			5		
<ul> <li>Set annual a</li> <li>Copy from Abigail Elizat</li> <li>Copy from la</li> </ul>	mount Deth Harding ast year 0	÷			5		

To manage your sales goal is easy when defining your sales targets (budget). With the **Sales Premium** license you have acces to **Targets**.

Open the Targets dialog by clicking **Main menu** in the top bar, or the **Task** button on **Dashboards**.

Click on the button **+Add groups and users** to select wanted user group for your sales target. Here you can choose between the whole company and user groups (users in the groups will automatically be added).

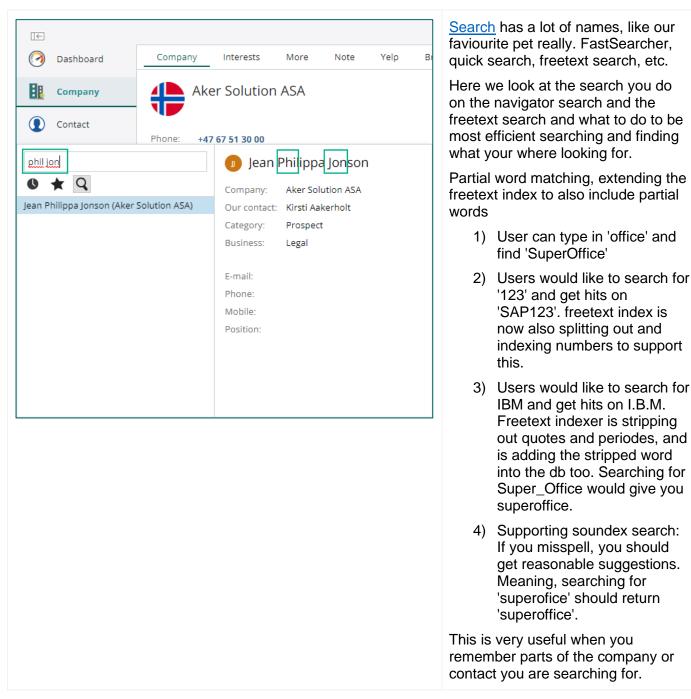
When all numbers are done, you do have the option to **Export to excel** from the **Task** button in the left bottom corner.

You can now add all the target numbers for each section you have added. You do have some options to copy one line to the other or adjust from last year. Just use the **Task** button on each line to **Adjust numbers**.

You need to have the functional right **Targets administrator** for your role to add, edit and remove target types.

**Note**: You will need **Sales Premium** license together with the **Unlimited sales targets license** to add more than one user group. If you only have Sales Premium license you are able to add one group for the target type All sales – Amount.

Read about <u>Sales targets</u> on the Help Center and Community.



### Quick Search – Navigator search and Freetext search (10.1.8)

### Sale – Sales target type (10.1.9)

 Measurement unit: 	Target type Amount at will have separate targets:	× ~
- Select target types th		
	at will have separate targets:	
Separate targets		
Available on comp	any level and group level only	/
	Save	Close

### Activities – Filter for all types (10.1.9)

	2	20.00.20	Charsession rier		It's easy to filter on the different
	ø	22.06.20		a question about	activity types in your Activities section
~		22.06.20	🗹 🗐 Documents	o send fax	tabs. Just select the ones you are
	ø	11.05.20	🗹 🔘 Mailings	chat	looking for and save time looking in
~	0	20.03.20	🗹 🗭 Chat session	u want valuable co	your archive.
	ø	28.04.20	🗹 🛅 Follow-ups	'inter is offline. Ca	
	ø	28.04.20	Form submissions	i i is down. Reset (	
	0	24.04.20		بالمتحدة فالتنافية	
+ Ac	bb	III Filter	🗏 🎯 👂 🗂 🚍 I ^	± Export	

To define the parameters and dimensions you need to set up a target type, first.

You can set up a target type for both users and groups, as well as set other target parameters: Target type, Measurement unit, Separate targets. You can also define if it only should be available on the company and group level (and not on the user level).

Target types (parameters)

- All sales
- Sale type
- Sale source
- Sale credited
- Sale competitor
- Company category
- Company business
- Company country

You can also set targets for any of your own user-defined fields that contain lists. When a target type has been selected it's not possible to select that type of target again, to avoid creating target types duplicates.

Read about <u>Target types</u> in Community.

Dataset	Layout					
Chart type:	III Column chart	~	My team ac	tivity level		
Measure:	Sum	~	4h 51m 40s			
Of:	🗂 Duration	~			4h 15m	
By:	Q		4h 10m		_	
Period:		_			1h 15m	
Grouping:	🗂 Duration		3h 28m 20s		11115111	
	Follow-up ID					
	Compare to period		2h 46m 40s			
Field:	Record type	× ×	2h 5m			
				1h 45m	2h 30m	
Formatting		_	1h 23m 20s	1h		
Title:	Title	A-Z		10		1h
X-axis label:	X-axis label	A-Z	41m 40s			1h
	Marchalada			45m	30m	
Y-axis label:		A-Z	Oh Om Os	Week 48 2022	Week 49 2022	Week 50 2022
legend:	Below	~		🛚 Todo 🛛 😑 Aj	opointment 🕘 I	Phone
Labels:	Number	~				

### Dashboard – Duration on Follow-up tiles (10.1.9)

When you select a follow-up tiles, you can choose Duration as the Measure option. With that option you can get the dashboard to show more info about the duration and have better mesurement and target on this.

### Find and selection – None of the interest (10.1.9)

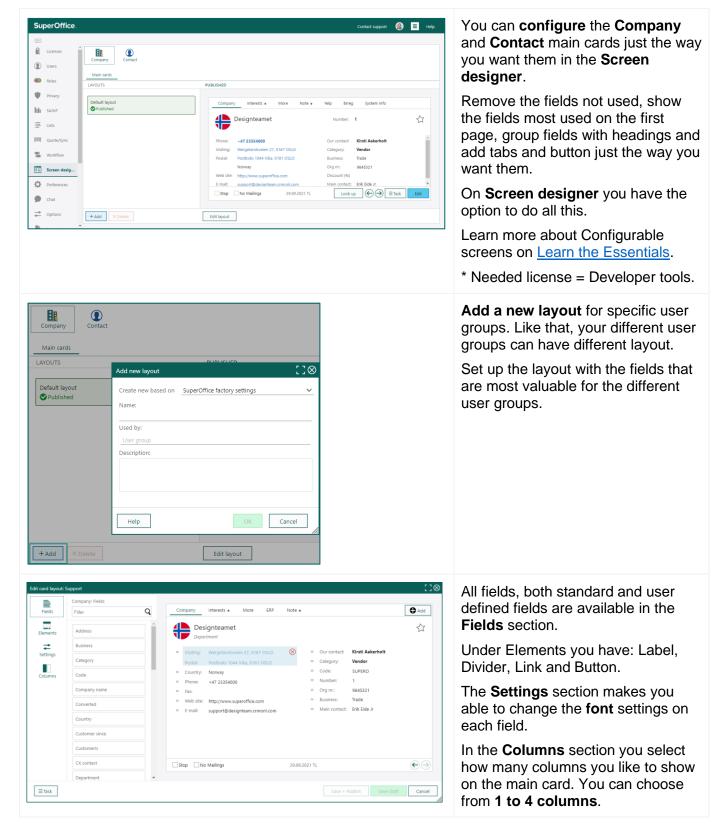
Company/contact	Criteria	Details	Charts Mailings		
= 🔃 Our contact	~	Is one of	✓ 👗 George Best 🔇	×	AND (
= ① Contact inter	rest 🗸	None of	✓ Select items		AND 🤅
+ Add		Is equal			
		Is one of None of	Or		

When you are searching for interests, sometimes you really would like to search for those who do NOT have this and that interests.

Simply select **None of** in the criteria operator when you add Contact interest or Company interest, and select the ones you do not want to search for.

# New and improved Settings and maintenance

Screen designer – New functionality for configurable screens (10.0.1)



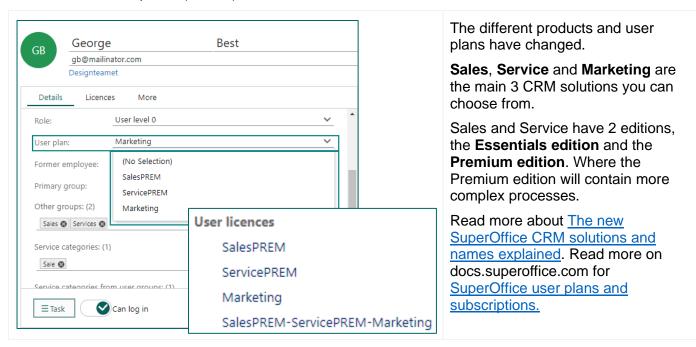
Company Contact Project Sale Follow-up Document Preview of field setup, including extra fields defined in System Design Fields Name Type Revenue (YTD) Decimal Revenue (YTD) US:"Revenue (YTD)";NO:"🔷 Status Earning (YTD) Decima Earning (YTD) US:"Earning (YTD)";NO:"F🖡 Discou Discount (%) Number Custor Discount (%) Discount (%) Subscription Exp. Date Onbo Subscription Exp. Subscription Exp. CX contact List  $\sim$ Systen CX contact Converted Checkbox Converted  $\checkmark$ Systen \_ Customer since Date Customer since Customer since Last S \_ Status List Discount code Short text  $(\uparrow)(\downarrow)$ + Add × Delete Help

User defined fields - Remove of field placement (10.0.1)

**User defined fields** is added with the wanted type and setting.

You can only change the rank of the field (when using tab inside edit mode), the placement of the field is done in **Screen designer**.

Users - New user plans (10.0.1)



	Company: Fields	
Fields	Filter	Company Interests • More ERP Note •
	Discount code	Designteamet
Elements	E-mail	Department
Settings	Earning (YTD)	= Visiting: Wergelandsveien 27, 0167 OSLO
Columns	ERP	Postal: Postboks 1044 Vika, 0181 OSLO = Country: Norway
Columns	Fax	= Phone: +47 23354000
	Interests	= Fax: = Web site: http://www.superoffice.com
	Last Service control	= E-mail: support@designteam.crmonl.com
	Main contact	ERP ERP ERP
	No Mailings	
	Note	
	Number	Stop No Mailings 29.09.20

Screen designer – Use ERP fields as a block (10.0.2)

On the **Screen designer** you can also show the **ERP fields** on the front page, not only on the ERP tab.

With that option, if ERP is important for your company, or for a specific user group, you can choose to get the ERP information on the first page on the Company and/or the Contact card.

You cannot choose what fields you like to show, you get **all the ERP fields** as a block or none at all, so make sure you have enough room for them.

### Screen designer – Settings on fields (10.0.3)

Edit card layout: [	Default layout				
Fields Elements	Settings: Revenue (YTD) Bold Italic	 Designte		ERP	No
Settings Columns	☐ Hide label Value alignment: ● Left ○ Right Text size: Normal ✓	Department Revenue (YTD) Earning (YTD) Discount (%) Subscription Exp. CX contact Converted Status Button	20,00 10,00 01.01.2022 Erik Eide Jr ✓ In Progress		

Setting up the different layouts with the different fields is a detailed job.

To be able to get the best result, you want to have some fields left aligned and some fields right aligned. Especially number fields are very neat to have right aligned, so it's easier to compare the different numbers with each other.

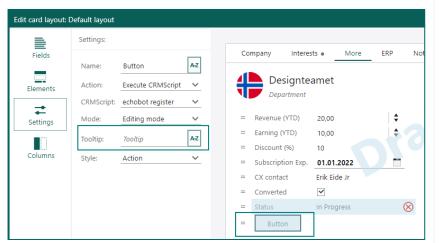
Select the field and choose the correct **settings** for the field, both for **font** and **alignment**.

Eß Main cards LAYOUTS Default layout Note • Company Interests • More Yelp Brreg Designteamet 53 Number: 1 Phone: +47 23354000 Our contact: Kirsti Aakerholt Visiting: Wergelandsveien 27, 0167 OSLO Vendor Category: Postal: Postboks 1044 Vika, 0181 OSLO Trade Business: Norway Org nr.: 9645321 Website: http://www.superoffice.com Revenue (VTD) 20.00 E-mail: support@designteam.crmonl.com Main contact: Erik Eide Jr ←→ = Task Edit Stop No Mailings 29.09.2021 TL + Add × Delete Edit layout Last published 11.11.2021 13:18 by RH

Screen designer – Info for last published by and date (10.0.3)

The layout can be drafted and **published** by multiple users.

To see the **date** on **Last published** and the **user** that did it, is very good indication to see if the latest changes have been published or not.

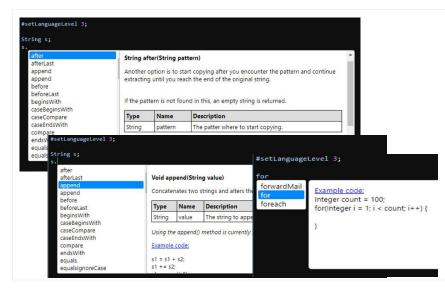


### Screen designer – Custom buttons with tooltip (10.0.3)

Creating a user defined button, it's a good idea to not have a very long name on the **button**.

To give your users knowledge about what will happen pushing this button, add a good **tooltip** like a description for the button.

### CRMScript - Intellisense experience (10.0.3)



**Intellisense** has a more unified and informative look and feel, making it clear what is the expected return type and parameters. We have also included useful code snippets for loops.

For full documentation on CRMScript please check out docs.superoffice.com.

### Document list – Template variable for semi long date (10.0.4)

dat1]	
Calendar:	gregoriansk kalender
First day of week:	mandag
Short date:	06.12.2021
Long date:	6. desember 2021
Short time:	13:36
Long time:	13:36:52
Change data forma	ts

A new template variable is added for long date from the gregorian calendar. [dat1]

d.mmm yyyy

Short date: 06.12.2021 Long date: 6. desember 2021

The month will be off course written in local language, so it will be correct for each language.

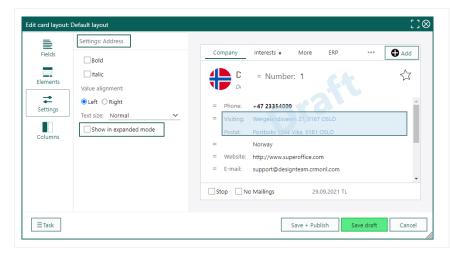
### Import – Gmail import of contacts (10.0.6)

4-							
Licences	*						
_		✓ Select source	Source details     Preview import	Done			
Users		Source file: M		Donto			
Roles							
nores							
Privacy			Map import file columns to SuperOffice fiel	4.			
			map import file columns to SuperOffice field	as			
SAINT							1
AI AI services	+ Contact: First name	+ Contact: Middle n	ame  + Contact: Last name  + Contact: Title	+ Company: Name	+ Contact: Birthda		
AI AI Services						^	
Lists						-	
	-						
	10.000						
Quote/Sync			Traperty Contraction (1997)				
Workflow			1991				
		-	Topo Contra Cont				
Workflow	er 4	-					

There has been some changes in Google Contacts api's, so we had to rewrite some of the import tool of contacts from Google Contacts.

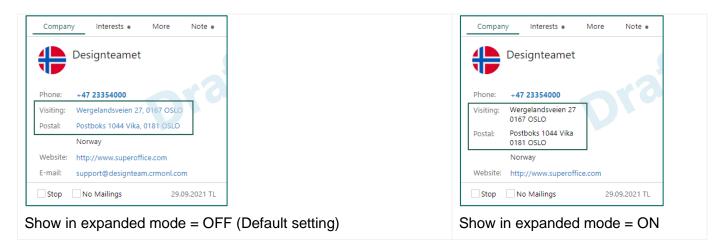
You only get to import the saved contacts from Google Contacts, and not all of your used email addresses. That will give a better quality of your import, since just an email is often too little information of the contact.

### Screen designer – Address field in expanded or one line mode (10.0.6)



When creating company and contact layout, you sometimes wants to show more or less of the address field. A check box for **Show in expanded mode** will give you the option to select the preferred look on the address.

Some do prefer to see the whole address field, while some don't use the address field that much, and are better of just seeing a one-liner for the address.



Security	improvements -	Credentials	and checks	(10.0.6)	)

	assistant@		e.no			
	Designteam	et				
Details	Licence	s M	ore			
User ID:		AJ				-
Nick name	e:	AJ				
Authentic	ation:	SuperID	1			
		accistant	<b>_</b>			
User nam	e:		t@superoffi	ce.no		1
Role:		User leve	el 1		~	
User plan:	:	SalesPRE	M		~	
Former er	nployee:					
					* *	•
∃Task		Can log i	n	Save	Cancel	

Change password dialog opened from main menu:

- For online users using SuperID dialog is opened with a button the user can click to receive the reset password email (previously the pw could be changed from within the dialog with no validation of pw policy)
- For online users using external IDP (microsoft,google) - dialog is opened with a message that the password only can be changed if using standard SO login (previously the menu item was disabled with this message in a tooltip)
- For onsite users dialog is opened as today, and password can be changed within dialog WITH validation of password policy (previously no validation)

Password validation towards password policy is also implemented for change of password through the API.

Edit personal signature dialog opened from main menu:

 Sanitazion of Email signature introduced (both for personal and request signatures)

Settings			$\otimes$	The User in modules th
Active language:	English		~	choose from
Number and date forma	t: Čeština		<b>^</b>	
E-mail client:	Dansk			Language
	Deutsch			00
	Deutsch (Schweiz)	]		Vietname
	English			Kanaan
	Español			Korean
	Français		el	Portugues
	Italiano		↓ lei	i onagaot
Portuguës (Brasil)		<b></b>		Chinese s
Suomi				Deutsch -
Svenska				Deutschi-
Tiếng Việt				We did hav
Русский				in not just \$
Українська				Marketing,
한국어				maintenan
中文				link, Gmail
日本語		<b>•</b>		Outlook.
				The help fo
				the Deutsc
				The help for
				the default

### Languages – 5 new UI languages on all modules (10.0.6)

The User interface for all our SuperOffice modules there is 5 new **languages** to choose from:

Language	SO code	LCID string
Vietnamese	VI	vi-vn
Korean	KO	ko-kr
Portuguese - Brazil	BR	pt-br
Chinese simplified	CN	zh-cn
Deutsch - Swiss	СН	de-ch

We did have Chinese before, but now it's in not just Sales module, but also Marketing, Service, Settings and maintenance, Mobile CRM, Outlook Mail link, Gmail link and SuperOffice for Outlook.

The help for Deutsch – Swiss will go to the Deutsch help.

The help for the other languages will go to the default English help.

### Request administration – Re-organized screens (10.0.7)

e-					
AI	Al services	Categories Priorities Request status	E-mail	System templates	
=	Lists	Filter categories	Q	Administration	
1	Quote/Sync	<ul> <li>Administration (Kirsti Aakerholt)</li> <li>Accounting</li> </ul>		Properties Members Assignment method	
	Workflow	<ul> <li>IT (Michel Krohn-Dale)</li> <li>Bot conversations (Petter Näslund)</li> <li>Feedback (Erik Eide Jr)</li> </ul>		Internal or external:	🔿 🕲 Internal 💿 External
111	Screen designer	Facebook feedback Instagram post		External name:	Administration
¢	Preferences	instagram post Sale (Kirsti Aakerholt) Support (Kirsti Aakerholt)		Subcategory of:	~
	Chat	Travel (Michel Krohn-Dale)		Category administrator:	Kirsti Aakerholt 🗸
+	Options				Show category in status view
					Only members have access
	Import				Send notification to members about new request
	Fields			Send notification about new request to email address:	
D	CRMScript			Ownership:	Take ownership when replying
٢	Requests			Default status for new message:	User-defined V
2	Customer centre			Default status for new request:	User-defined V
1	System design			Merge outbound e-mails for this category with reply template:	(No Selection)
4	App Store	+ Add × Delete			

The **Request screens** in Settings and maintenance module is slightly different in Service module on the same screens. But they do contain the same information and settings, and can be used both places.

The screens in Requests is:

- Categories
- Priorities
- Request status
- E-mail
- System templates

### Triggers – Quote approval triggers (10.0.7)

Su	perOffice.						Contact support	۲	≡	Help
4-										
AI	Al services	Choose trigger								
=	Lists									
1111	Quote/Sync	4	4	4						
1	Workflow	Before saving in dialog	Before save, approved	Before save, rejected						
101	Screen designer	Add/edit product	guote	guote						
¢	Preferences	CRM: after save								
•	Chat		4			1 au	- 1			
+	Options	After saving appointment	After saving stakeholder	After saving quote	After saving document	After saving company	After saving co	ontact		
Ð	Import									
	Fields	4	\$		<b>1</b>		<b>1</b>			
Ф	CRMScript	After saving relation	After saving sale	After saving project	After saving selection	After saving project member	After saving se member			
Ý	Requests	г			1	menioer	inemes.			
0	Customer centre	4	4	4						
	System design	After saving in dialog Add/edit product	After save, approved guote	After save, rejected						
A	App Store			- maile						

When you work with sales you might have come across sales that needs approval for reasons that the discount is not high or another reason.

To work effectively there are two triggers that can help you to work smarter with approvals:

- After save, approved quote •
- After save, rejected quote •

You can off course also create selections that shows quotes that needs approvals.

### Subscription management – Subscription form page with Powered by SuperOffice (10.0.7)

Please u		rences for: st below to reflect the ir us, and then click Confi		~			All contacts in Sup option to control th subscription manag overview they sele different subscription
_		send me e-mails with th					In the bottom of thi <b>Powered by Supe</b> the bottom right co
6	Preferences	Global preferences	Video meetings				The setting to show text is added to the
0	Freetext s	earch					section: Remove 'F
€ <sub>N</sub>	/larketing						SuperOffice' to Ye
8	Disable ima			○ Yes	0	No	With this preference
ľΓ	Remove 'Po	owered by SuperOffice':		○ Yes	0	No	control of how the
8	Disable vide	eo tool:		⊖ Yes	0	No	looks for your cont

Office have the r own ement. On their yes/no on the types you have.

page a text for Office is added in er of the page.

or not show this Global the Marketing wered by No.

you have more bscription page cts.

### Screen designer – Add Macro as button in CRM (10.1.1)

	Settings:							
Fields	Name: Action:	Create appointment AZ Execute CRMScript V		Des	ignteamet	More	ERP	🗘 Add
Settings	CRMScript: Mode: Tooltip: Style:	Create appointment     Y       Always     Y       Tooltip     Az       (No Selection)     Y	=	Visiting: Postal: Country: Phone: Fax:	Wergelandsve Postboks 1044 Norway +47 23354080		-	$\otimes$
			=	e	http://www.su	peroffice.com 29.09.2021 TL		eate appointment

Some users might find it efficient to have a **create appointment button** on a main card.

And if you wants to run a specific script when you create a new appointment from the **company card**, that is very efficient.

You create a new button on the Company card and set it up with a **CRMScript** to run whatever you like.

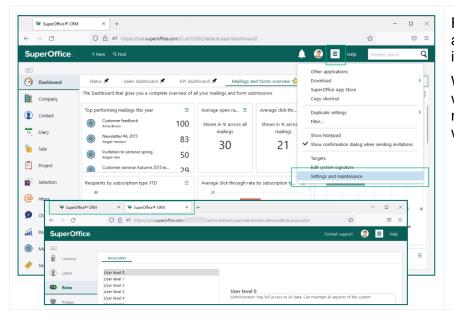
### Options – Add Customer languages from Settings and maintenance (10.1.1)

(÷	Lists	Time zones Nu	mber allocation Labels Repo	Customer languages		
	Quote/Sync	CUSTOMER LANGUAG	ES			
	Workflow					
the line	Screen designer					New customer language
ø	Preferences	Name	Language code	Virtual domain	E-mail domains	Default
	Chat	Dansk Deutsch	DK DE	.dk .de	.dk .de	
<b>-</b>	Chat	Dutch	NL	.nl	.nl	
÷		English	EN	.com; .co.uk	.com;.co.uk	~
÷	Options	Norsk	NO	.no	.no	
III).		Português	PT	.pt	.pt	
J.	Import	Svenska	SE	.se	.se	
	Fields					
0	CRMScript					
4	Requests					
Ø	Customer centre					

To set up the different customer languages for your Service setup, it's easy to do so in **Settings and maintenance** on the **Options** overview.

These languages are used in **Customer Centre**, the **FAQ** module and **Reply templates**.

### Settings and maintenance link from Sales opens new tab (10.1.3)



From the Sales module you have access to Settings and maintenace in the **Main menu**.

When selecting the menu item you will open a **new tab** for Settings and maintenance and can continue to work in the Sales module.

### Lists – GUI Web panel with reload settings (10.1.5)

Edit list item		$\otimes$
Name:	Brreg	A
URL:	https://w2.brreg.no/enhet/sok/detalj.jsp?orgnr= <orgr< td=""><td>ו&gt;</td></orgr<>	ו>
Window name:	brreg	
	contact.wwwbrreg	
Visible in:	Panel - Company card	~
URL encoding:	(No Selection)	~
Always relo	ad content on tab navigation	
	only if your content depends on data that might be changed in option will lead to more content being loaded.	other tabs.
🗌 Toolbar	Mobile CRM	
🗌 Address ba	r	
🗌 Status bar		
lcon: 🗸		
Description:		
Look up in Brø	nnøysundregisteret	A <sub>2</sub>
Uala	Restore Save C	ancel
Help	Restore	ancei

You can add web panels on a lot of different places in SuperOffice CRM.

To avoid reload of the web panel, you check **OFF** the check box for **Always** reload content on tab navigator.

This is manly to decrease the use of bandwidth and make the feel of slower SuperOffice CRM.

If it's important that user should have an updated webpage or the webpage needs to run a reload, then you need to set the check box to **ON**.

### Screen designer - Configurable archives/section tabs (10.1.6)

*	Tab		
Tab	Name:	Preview of company: Global Media	~
<b>±</b>	Relations	Contacts Relations Projects Act	ivities Sales ••• 🕒 Add
Settings	Unique name for tab (soprotocol)	Source - Full na Relation 🖉	Target - Full na ID
	relationarchive	Hermione Heste is a personal frie	John Doe (Globa HH
	relational crive	John Doe (Globa is a member of t	Taylor Solutions, HH
		John Doe (Globa used to work for	Global Media ER
		John Doe (Globa Is the same pers	John Doe (Clark HH
		+ Add × Delete ± Export	Former employees count : 4 🗘
≡Task			Former employees count : 4 O Publish Save draft Cancel
Reset to	o factory settings		
	e tab		

When you personalise the layout for the main cards and archives/tab sections it will match your organisation's information needs.

You can **edit the layout** by adding or removing section tabs/archives on the different main cards for Company, Contact, Sale and Project.

To **remove** standard section tab, select the tab you want to remove, go to **Task** and choose **Remove tab**. If you regret removing the tab or any changes done to the section tab,

Edit layout of section tab (archive): Default layout	click the <b>R</b> the <b>Reset</b>
Document     Sales documents     Contacts     ***     Add       Document     Appointment     Product     Project     Sales     Request       Sale     Request     Contact     Relation     ***     Save draft     Cancel	To <b>add</b> a m a new sect you like. C the new tal description select the o in the new main card new tab wi
Add new layout     Comparison       Create new based on     SuperOffice factory settings       Name:       Image:       Assign to:       Select       Description:	Appointme Project me stakeholde Relation. A the differen content to also can se the advance
Help OK Cancel	If you have different ne you have th multiple lay groups.
	Create the select the to section a
	Read more screens on Community
	Screen des for <b>Develo</b>

# click the **Restore tabs** menu item or the **Reset to factory settings**.

new section tabs, you add tion tab on any main cards lick the **Add** button, write b name and add a n to it. In **Settings** you content you want to show tab. Depending on the choosen, you can add a ith contents of: Document, ent, Product, Project, mber, Sale, Sale er, Request, Contact and All that is left, is to decide nt criteria to filter the your specific needs. You et up different actions in ced option.

If you have user groups that do have different needs for the section tabs, you have the same option to create multiple layouts for the different user groups.

Create the **new layout**, name it, select the user group(s) in the assign to section and add a description.

Read more about <u>Configurable</u> <u>screens</u> on the Help Center and Community.

Screen designer needs the license for **Developer tools**.

# Title Extend CRM script to push a dialog to the user OK Cancel OK Cancel Image: Supports adding field types: Image: Support to the user Image: Support to to the user

CRMScript – Script triggered custom dialogue (10.1.9)

		Title		
Body Text				
StaticLabel				
Label	Textinputfield			
Description:	Number input field			
This is a d	heckbox			
			ОК	Cancel

- List (UdList or adding items from code)
- Checkbox
- Supports setting title, body text and icon

To trigger a dialog you can link it to Before/AfterSave triggers in CRM with new method ed.showDialog(JSON string). Or you the script will be able to catch the response and take actions based on values.

# New and improved Customer Engagement Platform

Chat – Warning on new chat message (10.0.2)

Chat channel: Customer Inquirie	es		
Properties	Language: English		~
Chat widget layout	Badge header:		
Agents	Need to talk?		
ch - 10 - 1	Description:		
ChatBot	English speaking chat for customers visiting Center	our Custo	omer
Offline form Active	Warning on new chat:	1	min
Pre-chat form Active	Manager warning on new chat:	2	min
Post-chat form Active	Warning on new chat message:	1	min
ACUVE	Manager warning on new chat message:	5	min

When you are working with Chats, you sometimes have to wait for the answer from the other part. And when you do, you probably want to do other stuff. But you still wants to get notified when you do get an answer.

With the settings in the chat channel, where you can set up different notifications, you will get a warning as soon as the other part have answered:

- Warning on new chat
- Manager warning on new chat
- Warning on new chat message
- Manager warning on new chat message

Chat channel: Community inquir	ies
Properties !	✓ Enable request submission
Chat widget layout	Request category: Support V
Agents	Request priority: Medium 🗸
ChatBot	Enable request submission in queue
Offline form Active	Display after minutes in queue: 0 Display when queue size reaches: 0
Pre-chat form	Mandatory fields required to submit request:  Full name
Post-chat form	✓ E-mail address
Active	Company name

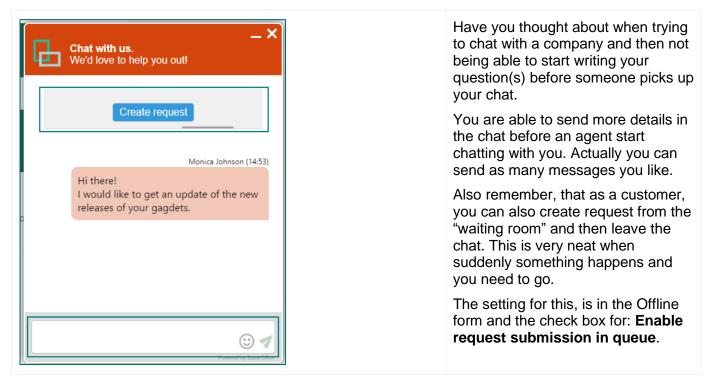
Chat – Customer can create request if long queue (10.0.3)

Using chat is a short way to get answers to your questions.

When no agents are available, outside office hours or there is a long queue, it's a great way to keep the customers happy by allowing them to create a **requests** instead.

The customer place whatever question they have, send the request and can sit back and wait for an answer as soon as an agent are available and can answer the request.

### Chat – When in queue keep writing a message (10.0.4)



### Chat – Rating on a chat from the customer (10.0.5)

Edit chat channel Chat channel: Chat on COM cha	Enable post-chat form	::⊗	After the customer has chatted with one of the agents, they might have a feeling of good or bad experience and help of their issue.
Properties Chat widget layout Agents ChatBot Offline form Active Pre-chat form Active	Header: Thank you for chatting with us. We hope your question go Message: Please contact us again if we can help in any other way.  Enable transcript  Enable transcript Please set a rating of your chat with our agents.	Image: A start with the two hole your deasting with two hole your deasting with two hole your deasting with two hole your deast with two hol	<ul><li>When you enable rating you can give your customers the possibility to set 1-5 rating of their chat.</li><li>This rating is shown on the chat display, and you can also se the rating on the chat report.</li><li>It all can help you to give a better experience for your customer.</li></ul>
Help	v	Save	

### Chat – Better use of small screens like a mobile (10.0.6)

▲ sod.superoffice.com/( 2 : How may I help?	The chat module can be added to any page your company use for your customers or other.
Tell us how you are so we can help you   better   YOUR NAME   YOUR E-MAIL ADDRESS   YOUR E-MAIL ADDRESS   YOUR COMPANY   YOUR company   YOUR country   YOUR country	And when you add a the <b>chat to</b> <b>web page</b> , that page can also be opened by mobile. So it's pretty important that the chat module use the mobile screen as efficient it can, in all the <b>different sizes</b> a <b>mobile</b> can be displayed.
Type your question here 🙂 🚀	
Pastered by SuperOffice	

### Languages – 5 new UI languages on all modules (10.0.6)

<b>(</b>	) 🔳 неір	Quick searc	The User interface for modules there is 5 ne choose from:		
La	ttings nguage	>	Language	SO code	LCID string
Yc	Norwegian		Language	coue	Sung
CI CI LC	English	_	Vietnamese	VI	vi-vn
07.00 19.08.2	German Swedish	30	Korean	KO	ko-kr
06.03.2	Danish	01	Portuguese - Brazil	BR	pt-br
29.10.2	Dutch		i ontagacco Diazi	BIX	pror
19.10.2	French		Chinese simplified	CN	zh-cn
21.08.	Spanish				
	Italian		Deutsch - Swiss	СН	de-ch
<u>Show</u>	Czech				
	Finnish	_	We did have Chinese		
	Polish		in not just Sales mod	•	
Creat	Russian	20	Marketing, Service, S		
01.02		in the second seco	maintenance, Mobile		
31.01	Chinese	di di	link, Gmail link and S	uperOff	ice for
10.12	Vietnamese	(p	Outlook.		
04.10		2	The help for Deutsch	- Swiss	s will go to
04.10		p	the Deutsch help.		-
01.10	<u> </u>	di	The help for the othe	r longuo	ace will a
	Swiss German		The help for the othe the default English he		ges will ge
Showi	ing 1 - 22 of 22 rows			-iμ.	

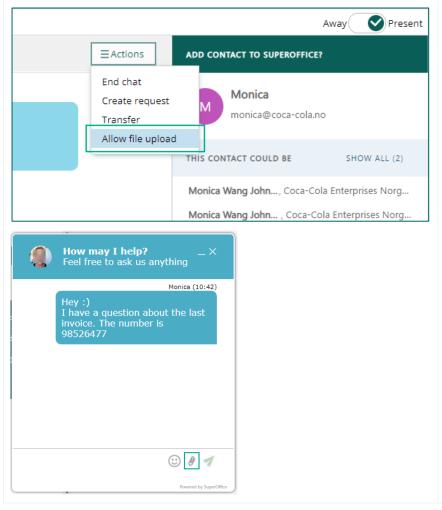
hat channel: Contact page					
roperties	ſ	Theme:	Modern	~	WELCOME TO OUR CHAT _ X
Chat widget layout		Theme colour:	Arial		How can we help you today?
Igents		Message colours:	Arial		Customer (13.51) Hi, I have a question.
ChatBot		Button colour:	Arial		Useragent (13.51) Hello, how can I help you?
Offline form Active		Widget size:	Normal	~	Cutomer (13.51) What are your opening hours?
Pre-chat form Active		Show logo	pload file (or dra oto	ig and drop nei	
Post-chat form Active		Use agent's first	t name only		Type your question here
		WELCOME TO OU	R CHAT		Powered by SuperOffice

### Chat – Configuration options for styling chat widget (10.1.3)

When setting up a chat channel, it's important to be able to fine tune different fonts, colours and buttons. With these options you can fine tune the chat layout:

- Add more options to configure styling for Chat widget.
- Cursor: pointer when hovering over chat widget.
- Possible to have different colors on header and chat messages.

### Chat – Allow file upload in chat for the customer (10.1.5)



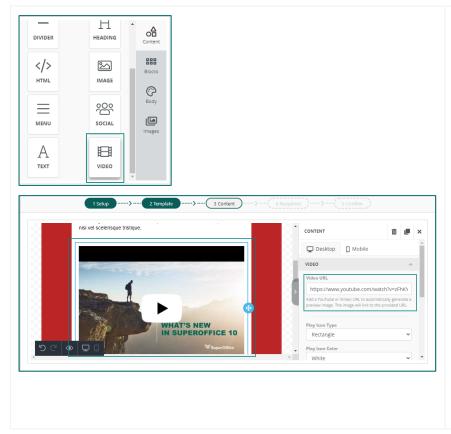
When you, as an agent, chat with a customer, you can **upload** any **file** you like. The customer on the other hand, might not be trustworthy, and you do not want any file uploaded from them. But sometimes you do trust your customer and they want to upload some files to you.

On each chat session, the chat agent can select **Action** and **Allow file upload**. When doing that, the customer will get a file upload button in their chat window and can upload the wanted file to the chat agent.

The files uploaded in the chat, either from the agent or from the customer, will be shown as a link in the chat session after it's ended, so also available if the chat agent has to send the information to a different user.

# New and improved Marketing

### Mailing – Add video in content of the mailing (10.0.4)



You sometimes want to show a video in the mailing, and not just send a link.

Go to the mailing, add **VIDEO** from the **Content** section and then add a YouTube or Vimeo URL to automatically generate a preview image. The image will link to the provided URL.

There is a lot of different settings on this content type:

- Play icon type
- Play icon color
- Play icon size
- Container padding (top, bottom, left, right)
- Responsive design with Hide
   on Desktop/Mobile (on/off)

The only video url supported is from YouTube or Vimeo.

CONTENT	On the <b>social media bar</b> , you can have several social media buttons that are linked to your own accounts/sites.
De Twitter	elete Social Links Click the icons to add (f) (1) (10) (10) (10) (10) (10) (10) (10)
URL https://twitter.com/	elete
	Xing, as a social media, has been added as a button option. You can also add a <b>web page</b> of any kind, in your social media.
URL https://xing.com/	elete To use the different buttons, you need to create a <b>new social bar</b> where you add the new items like Xing and a web page. This new social bar needs to be added to
URL https://	your mailings and your message templates ready to use for new mailings.
	elete
Show More Options         Image: Construction of the second seco	

### Mailing – Social bar with Xing and other generic web pages (10.0.5)

### Mailing – Recover unsaved changes (10.0.5)

1 Setup	2 Template ······ 3 C	ontent		
Warning: Calculation of recipients failed. Please verify	that the selections are still existing.			
	alClent]] Click here to view in brows Unsaved changes found It seems like you have some unsave saved version is from 19.1.2022, 143 Would you like to recover unsaved of	d changes from 19.1.202; 37:45 by KA.	, 144008. Last	BUTTON HEADING IMAGE
Help Send test Create new t	racked link		Apply Save + close	Previous Next
Unsaved changes found			¢	$\otimes$
It seems like you have som saved version is from 19.1. Would you like to recover	2022, 14:37:45 by KA		2, 14:40:08. Last	
		Yes	No	

Users working on a mailing design does not always remember to save their latest changes.

They are likely to navigate elsewhere in the client to look up some data, or if they are interrupted in their work because of a phone call etc.

When you re-open your mailing, you get the message **Unsaved changes found** and you can decide if you want to recover the unsaved changes or discard them.

### Languages – 5 new UI languages on all modules (10.0.6)

ettings			
Active language:	English	~	
Number and date format: E-mail client:	Čeština Dansk	<u> </u>	
	Deutsch Deutsch (Schweiz)		
	English		
	Español Français		-
	Italiano	▼ <sup>el</sup>	
Portuguës (Brasil) Suomi		*	
Svenska Tiếng Việt			
русский			
/країнська 한국어			
Þ文			
日本語		•	

The User interface for all our SuperOffice modules there is 5 new languages to choose from:

Language	SO code	LCID string
Vietnamese	VI	vi-vn
Korean	KO	ko-kr
Portuguese - Brazil	BR	pt-br
Chinese simplified	CN	zh-cn
Deutsch - Swiss	СН	de-ch

We did have Chinese before, but now it's in not just Sales module, but also Marketing, Service, Settings and maintenance, Mobile CRM, Outlook Mail link, Gmail link and SuperOffice for Outlook.

### Form – Set up Our contact with a default on form submissions (10.1.3)

it form		[]⊗
Form name:		
Send us your quest	on	
Properties	<u> </u>	
et al la	What should happen when the form is process	sed?
Fields	Add contact to selection:	~
Style	Add contact to project:	~
Double opt-in	Add interests to contact:	
Thank you page	E-mail response:	
Page for inactive form	Execute CRMScript:	~
Actions	Default category:	~
	Default business:	~
	Default Our contact:	~
	Save	oply now Cancel

In forms you set up different Actions on the **form submission**. This are important especially when you select that the contact is added automatically.

You have the option to set different defaults on fields like:

- Our contact
- Category
- Business

This will give better data in SuperOffice and the customer/contact can be found easier.

### Mailing – Document mailing with language (10.1.6)

1 Setup 2 Temp Choose template for this mailing Recent templatesAll mailings	Slate	Search templates Q	When you create a Document mailing you use the different templates in your system.
E	Letter - Intl. Fax - Intl. re selected template exists in multiple languages. Hect language: Default 🗸	Inc. document	If that template is in <b>multiple</b> <b>languages</b> , you do get an option in the <b>step 2</b> , to select the wanted <b>template language</b> for the mailing.
Document Document 24.06.2022 24.06.2022	OK Cancel	Document 24.06.2022	The dialog shows the drop down of all the <b>language</b> the template is stored with, just choose the wanted one, and continue to edit the document mailing.
The selected template exists in m Select language:			
Da Ge	rfault nish rman itch		
Colos Proposal Dro	redish et al.		

# New and improved Service

Forms – Publish options (10.0.1)

Direct link Embed inline Embed as popup Embed as side tab		https://s	od.superoffi	ce.com/Cust
Direct link Embed inline Embed as popup Embed as side tab		<script s<="" th=""><th>rc='https://s</th><th>od.superof</th></tr><tr><th>Direct link Embed inline Embed as popup Embed as side tab</th><th><pre><seript st serif" dat Button size: Button text: Font: Base font size: Font colour: Button color:</pre></th><th>#fffff</th><th></th><th>1/CS/scripts/cust 10c0" data-fontCo yem (psum</th></tr><tr><th>Direct link Embed inline Embed as popup Embed as side tab</th><td><pre><script sr sans-serif Button size: Position: Button text: Font: Base font size: Font colour: Button colour: Button color:</pre></td><td>#fffff</td><td>ffice.com/Cust35384</td><td>/CS/acripts/cust "#0070c0" data-f</td></tr></tbody></table></script>		

When you want to publish the form you have created, you have different publish options:

- **Direct link** this shows over a whole web page.
- **Embed inline** script tag on a page you use this tag.
- Embed as popup shows a button and when clicking, a styled pop up shows the form. Different settings to customize the button.
- Embed as side tab show a button on left or right side of the page. The form slides out when pushing the button. Different settings to customize the button.

### CRMScript – Tracing of scripts (10.1.4)

.ibraryB 🗸	Return	Step back	Step in	Step out of sc	ope	Step out	Step forward	
#setLanguageLevel	3;			11/18				⇒ ^
<pre>#include "coreFunc</pre>				11/18				
Integer bCounter =				Variables				
<pre>Void functionB() {</pre>				Name			Value	
<pre>bCounter++; printLine("funct </pre>	ionB" <b>);</b>		globalStuff globalStuffA	globalSt	uff			
X				bCounter	2			
Clicking here will fast f	orward to fram	e where this code	is executed.	Info				
Res	izing here will	be remembered						
Res	izing here will	be remembered		•				+
Res	izing here will	be remembered		•				•
Res	izing here will	be remembered						→ →
Res	izing here will	be remembered						•
Res	iizing here will	be remembered						*
Res	iizing here will	be remembered		•				•
Res	izing here will	be remembered		4				
Res	izing here will	be remembered		4				

Vhen **debugging** in real time, or hen viewing a saved script trace, ve have a dropdown to the UI with Il the source locations for the urrent debug/trace session. For arge scripts that are using includes, this allows you to quickly witch between the different ources. In debug mode, you can se this to e.g. set a breakpoint in nother file. In tracing mode, clicking n the gutter (where the red reakpoints are shown) will now nstead fast-forward the trace to that ocation. This can be very useful hen viewing large script traces: nstead of having to use the slider to ry to find the frame where some articular code is executed, you can ather click next to the code and the lider will move to the correct osition.

Another small but welcome improvement to this view is that the width of the sidebar (containing info, variables, etc) is remembered in your browser and reused on subsequent views.

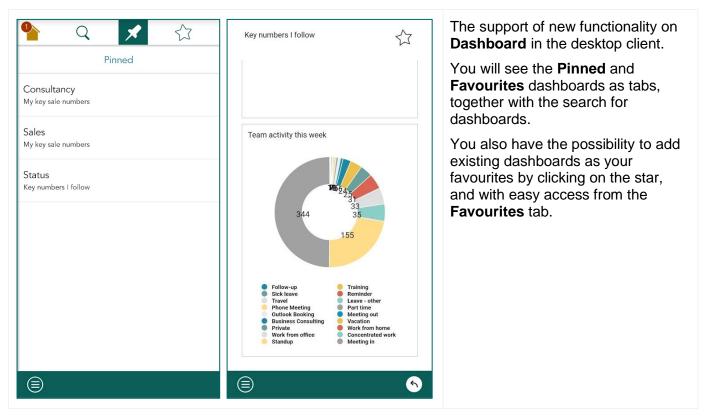
In the article <u>CRMScript developer</u> improvement you will find out more.

Read more about the details for the solved issues:

<u>28896, 28140, 28482</u>

# New and improved SuperOffice Mobile CRM

Mobile CRM – Dashboard support (10.1.4)



### Scripts – Support of scripts in Mobile CRM (10.1.5)

Mobile CRM adds support for executing additional CRMScript event triggers. The event scripts need to be defined in Service web client.

Mobile already supported triggers in these categories:

- Service: new request
- Service: request changed

This release adds additional triggers from these categories:

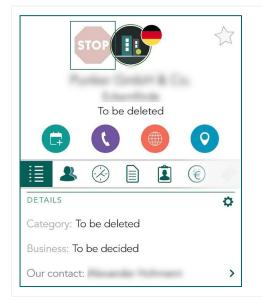
- CRM: before save
- CRM: after save

All entities are supported, except those that are now available to create or edit in Mobile:

- Stakeholder
- Quote
- Relation
- Selection
- Selection member

One feature from CRMScript triggers that is currently not supported in Mobile is NavigateTo (neither custom er soprotocol navigation).

### Company – Show stop on Company (10.1.7)



The **stop** sign on **company** can be used for a lot of things. The most common way to use it, is if there is some issues with payment, the customer are in the progress of cancel their engagement or the company needs to have some special treatment that you, as an user, needs to be aware of.

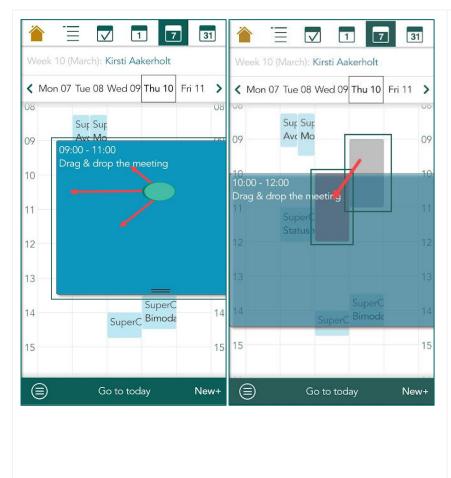
When a company is marked with the Stop sign, it's usefull to see it at once, instead of scrolling down the details list to see the check box on/off. The stop sign in the header, will give you instant warning before you do anything with the company.

### Request – Add multiple images to a request (10.1.7)

Add comment: 3210304	Save	Add comment: 3210304	Save
Klie	ntų a	Chevatric sugars rolyna, I	hern, s
Owner:	>	Owner:	>
Category:	>	Category:	>
Status: In queue	>	Status: In queue	>
MESSAGE Add image from gallery		Attachments: image_2.jpg +2 MESSAGE See the extra images added.	>
Add image from camera			
Cancel		<u></u>	
	Ganoor		Cancel

When replying to a **request**, you can add an image to the comment. It's pretty nice to be able to add **multiple images** in one go.

Go to the Menu and select either Add image from gallery or Add image from camera. Just select the different images you want, confirm and the your can **save** your comment. Diary – Diary with drag & drop (10.1.8)



With the drag & drop function in Diary, you can be pretty efficient to reorganize and move around your follow-ups like appointments and phone calls.

Click on wanted appointment.

It shows the appointment over the whole diary.

Push down and then drag it to the new time you want the appointment.

Release your thumb when you are happy and the appointment is moved.

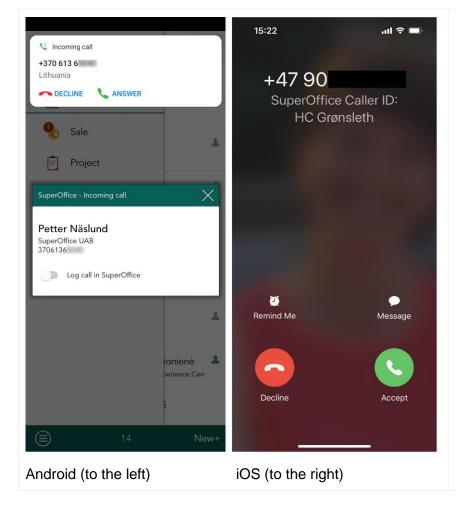
You can off course also drag and drop inside the diary to create new follow-ups.

This functionality has been here a long time, but it has been changed that the move does not happen before you have selected the followup, wait at little and then drag it. The earlier functionality created a lot of unwanted moved customers when scrolling up/down.

### Languages – 5 new UI languages on all modules (10.1.8)

Language	The User interface for all our SuperOffice modules there is 5 new languages to choose from:
Deutsch	SO LCID Language code string
Nederlands	Vietnamese VI vi-vn
Svenska	Korean KO ko-kr
Français	Portuguese - Brazil BR pt-br
Čeština	Chinese simplified CN zh-cn
Italiano	Deutsch - Swiss CH de-ch
Español	We did have Chinese before, but now it's in not just Sales module, but also Marketing, Service, Settings and
Suomi Polski	maintenance, Mobile CRM, Outlook Mail link, Gmail link and SuperOffice for Outlook.
Português do Brasil	The help for Deutsch – Swiss will go to
Tiếng Việt	the Deutsch help.
中文	The help for the other languages will go to the default English help.
한국어	
16 5	

### CallerID – Identify your calls with Mobile CRM (10.1.9)



When you get incomming calls and the caller is not one of your contacts, you can choose to use Mobile CRM to show you the caller id.

Go to **Settings** and click on **Allow** call identification, follow the prosedure to set it up.

With this on, Caller ID you will give immediately info on who is calling you and you can respond properly.

NB! There are more functionality available for the Android than the iOS. This is due to the limitations in the iOS platform. For Android we can also offer to save the call as a phone call in Mobile CRM after the call is finished.

See the FAQ on <u>how to use CallerID</u> and set it up.

### Notifications – Request notifications (10.1.9)

10:01	Request notifications
Thursday, 20 January	New request Digital Experience Cloud Mainten <sup>ID: 340</sup>
Request has been escalated now Request «Please help me» has been escalated to priority 3 Low, level 3	New request (SOS id:3209367) Store Communit <sup>ID: 339</sup>
Request has been activated now . Request «Please help me» has been activated	New request
New request now . You have a new request in the «Insurance help form» category	IT-kalender og siste nytt fra DND <sup>ID: 337</sup>
New message now You have a new message in request «Please help me»	
Swipe up to open	
Push notifications	
Meeting invitation:	
Meeting changes:	
Appointments with alarm:	
All appointments:	
New request:	
New request message:	
Request activated:	
Request escalated:	

Both the **Notification center/Notification drawer** and the **Notification screen** in Mobile CRM will notify you about requests changes.

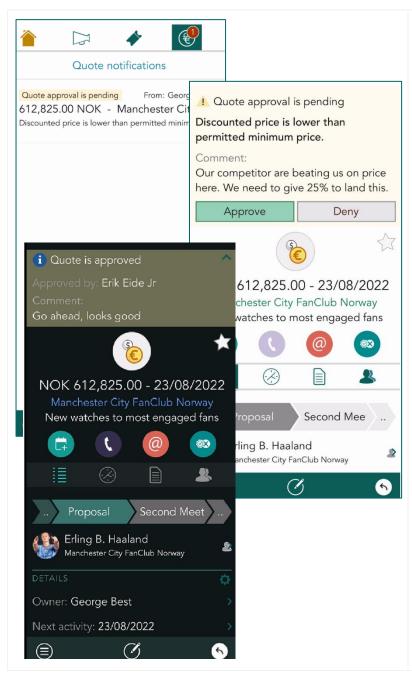
In addition, you can filter on type of Request notification so you only see a subset of the Request notifications. This is fine tuned in the **Settings**, **Notifications screen**.

Notification Centre (iOS) / Notification drawer (Android): Get notification on various request events in Service in Mobile CRM when new requests are assigned to you, when your assigned requests have been changed or are updated and when requests are reactivated or escalated. Click the notification to open the request in Mobile CRM.

Mobile CRM Notification screen: A

new tab for Request notifications has been added to the Mobile CRM Notification screen. You will see the same Requests notifications as in the Notification Centre/Notification drawer. In addition, you can filter on type of Request notification so you only see a subset of the Request notifications.

### Notifications - Notifications for Sale Quote approval (10.2.2)



In Mobile CRM you will now be notified if someone needs **approval** for their Sale Quote to be sent to customer. You can see all the important details about the sale in Mobile CRM and **Approve** or **Deny** the Sale Quote. The person who issued the approval will get notified immediately. This makes the Quote Approval flow easy and without any friction. The sale must go on :-).

Read more about it in chapter:

Sale – Quote approval and notification in Mobile CRM (10.1.5)

This feature requires SuperOffice CRM v10.1.5 or newer and Mobile CRM v10.2.2 or newer.

## Search – Search for anything (10.2.2)

	m	5	/contact isset MKøhiriisemixnaxt iS, BB is							
		Erik Eide Consulting Ltd								
<b>4</b> v	all a	Box c		ng C	Com	pany	y Lto	1		
		Mot		CRM	Tea	ım L	td			
24	1)	Mok	oile (	CRM	test	t coi	mpa	ny 🖗	Ďô	ne
q	W	e	r	t	У	u	i	0	р	å
а	s	d	f	g	h	j	k	1	Ø	æ
$\Diamond$		z	x	С	V	b	n	m		$\bigotimes$
123				me	llomr	om			søk	<

# New and improved Office integrations

### Languages – 5 new UI languages on all modules (10.0.6)

The User interface for all our SuperOffice modules there is 5 new languages to choose from:

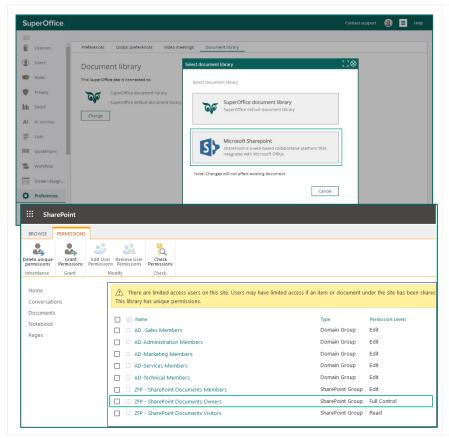
Language	SO code	LCID string
Vietnamese	VI	vi-vn
Korean	KO	ko-kr
Portuguese - Brazil	BR	pt-br
Chinese simplified	CN	zh-cn
Deutsch - Swiss	СН	de-ch

We did have Chinese before, but now it's in not just Sales module, but also Marketing, Service, Settings and maintenance, Mobile CRM, Outlook Mail link, Gmail link and SuperOffice for Outlook.

The help for Deutsch – Swiss will go to the Deutsch help.

The help for the other languages will go to the default English help.

### Document library – SharePoint integration (10.1.4)



SuperOffice's **SharePoint document library** integration lets you create, archive and share documents and emails effortlessly and securely.

This integration allows you to store all documents and emails in **SharePoint Online**, where they can be accessed by everyone in the company, including even those who do not use SuperOffice CRM. The access to your SuperOffice document site in SharePoint can be controlled through domain groups (AAD = Azure active directory authentication).

Read about how to set up <u>SharePoint document library</u> in the Settings and maintenance.

# **API changes**

### API – New license structure (10.0.1)

In SuperOffice 10 there is a new user plan structure. Due to the license changes on users, the API is also changed to support all the different licences etc.

If your app checks for or requires a specific license, it must take the SuperOffice 10 license scheme into account.

Read more about <u>SuperOffice product names and feature sets</u>.

### API – Webhooks sent for Bulk update changes (10.0.5)

Webhooks are a means to broadcast events that happen inside SuperOffice as they occur. A webhook payload includes information that describes what has changed and is broadcast to all applications that have subscribed to a corresponding event.

This change fixed bug (BIGID) and now webhooks are sent by actions performed by Bulk updates.

Read more about webhooks.

### API – SuperOffice.WebApi Agent with better testability (10.0.6)

When using our WebApi's it's important to be able to test your use of it.

Read more about <u>SuperOffice.WebApi Agent</u>.

### API – TicketAgent new method (10.0.6)

Ticket & TicketMessage POST REST API have got a new parameter - to send notifications or not. Defaults to not. This will not affect intergrations.

New Ticket agent methods:

- SaveTicketEntityWithNotify and
- SaveTicketMessageEntityWithNotify.

Read more about <u>GET TicketMessage</u>.

### API – Support for RSA Signature with SHA-256 in CRMscript (10.1.1)

Extend support for RSA signature in CRMscript. The following has been added to CRMScript - A new class called "Rsa".

The following methods are available:

- Bool loadPrivateKey(String privateKey, String password)
- Bool loadPublicKey(String publicKey)
- Byte[] createSignature(Byte[] data, Integer hashingAlgorithm)
- Byte[] createSignature(String data, Integer hashingAlgorithm)
- Bool verifySignature(Byte[] data, Byte[] signature, Integer hashingAlgoritm)
- Bool verifySignature(String data, Byte[] signature, Integer hashingAlgoritm)

### API – Add exception message in JSON response (10.1.1)

When migrating from SOAP to web API calls you need to change exception handling, and want more details from the web API, like the message included in the JSON response.

Read more about it on Community Bugs & Wishes:

https://community.superoffice.com/en/product-releases/bugs-wishes/productissue/?bid=21478&azure=1

### API – WebApi client to use interfaces (10.1.1)

WebAPI client classes can mock using the HttpClient - but we can add interfaces to make it easier to Moq the whole thing.

```
var handler = new MockHttpClientHandler();
var mockClient = new System.Net.Http.HttpClient(handler);
handler.Content.Enqueue((HttpStatusCode.OK, @"{""PrefDescId"":987,""Level"":""SystemWide"",
WebApiOptions session = new WebApiOptions(WebInit.Url);
session.Authorization = new AuthorizationUsernamePassword("adm0", "");
using (var agent = new PreferenceAgent(session, mockClient))
{
var x = UserPreferenceStrings.Defaults.Section;
var y = UserPreferenceStrings.Defaults.DefaultTimeZone;
var res = agent.GetPreferenceByNameAsync(x,y, PreferenceLevel.Undefined).Result;
Assert.IsNotNull(res);
Assert.AreEqual(0, res.PrefDescId );
Assert.AreEqual(0, res.PrefDescId );
Assert.AreEqual("UTC", res.DisplayValue, "Should contain a raw value");
Assert.AreEqual("SystemWide", res.Level_String, "Should contain a level");
Assert.AreEqual(PreferenceLevel.SystemWide, res.Level, "Should contain a level");
}
```

### API – Lookups based on Name if the id is 0 (10.1.1)

Fixing API to do lookups based on Name if the id is 0.

This is now acceptable JSON - will look up list item ids since they are not specified:

```
{ "Name": "New Company",
    "Business": {
        "Value": "Finance"
    },
    "Category": {
        "Value": "Supplier"
    },
    "Country": {
        "Name": "Supplier"
    },
    "Associate": {
        "Name": "JJ"
    }
}
```

Read more about it on Community Bugs & Wishes:

https://community.superoffice.com/en/product-releases/bugs-wishes/productissue/?bid=25308&azure=1

### API – Breaking changes on Web.Api (10.1.3)

SuperOffice.WebApi 10.1.3 breaking changes:

- System user functionality moved into package SuperOffice.SystemUser.Client.
- Extracted Authorizations into the following packages:
  - o SuperOffice.WebApi.Authorization, contains the following [default] authorizations:
    - AuthorizationUsernamePassword
    - AuthorizationTicket
    - AuthorizationImplicit
  - SuperOffice.WebApi.Authorization.AccessToken , contains:
    - AuthorizationAccessToken
  - SuperOffice.WebApi.Authorization.SystemUserTicket, depends on SuperOffice.SystemUser.Client package.
    - AuthorizationSystemUserTicket
- IAuthorization.GetAuthorization changed, now returns an AuthenticationHeaderValue instead of a tuple.

- Changed Environment enum property to SubDomain string.
- Added CancellationToken support

### API – CRMScript (10.1.4)

Improvements to CRMScript:

- Added two new functions to arrays and structs: .toJSONString() and .fromJSONString() which will directly use a string as input or output.
- Arrays now have a .buildString() method, which creates a delimited string of its members.
- Structs can implement a toString() method. This will work together with the .buildString() function above, but will also as a bonus make variables of these types better to view in the debugger/tracer.
- Error messages for incorrect array functions are now shown at the correct source position.
- Support for .sort() on arrays. Basic types will be sorted normally, such as Integers, strings or floats.
- Structs that implement a compare(struct s) function are used when sorting an array of that struct type.

Read for more information:

https://docs.superoffice.com/automation/crmscript/reference/CRMScript.DataStructure.Array.html https://docs.superoffice.com/automation/crmscript/reference/CRMScript.DataStructure.Struct.html

### API – Quote Connector for Approval/Rejection (10.1.5)

Quote Connector API for Approval/Rejection is in there for SOAP and on-site DLLs as well as the yet-to-be-released REST connector.

WCF connector will detect missing Approve/Reject methods on remote service and ignore errors from them. WCF connector will avoid calling if methods are flagged as missing.

QuoteConnector plugins must implement new IQuoteConnector2 interface to add support for approve/reject methods.

Read more about the <u>ERP Quote connector</u> and <u>SuperOffice Quote connector</u>.

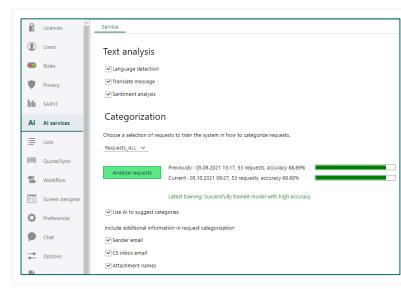
### API – Update overview (10.1.9)

Check out the update overview on the sub pages to get the exact API change. <u>https://docs.superoffice.com/release-notes/10.1/api/index.html</u> <u>https://docs.superoffice.com/release-notes/10.1/api/version-changes/changes-10.1.8.583.html</u>

# **Developer Products**

Read more about the <u>Expander Services and Developer Products</u> and <u>Developer Tools</u> on <u>docs.superoffice.com</u>.

### AI Services – New functionality (10.0.1)



Artificial Intelligence Services contains different areas:

- **Text analysis** on incomming Requests.
- **Categorization** where the service tries to find the best category for requests.
- **Chatbot** for a Chat channel, where the message on the chat is passed on to a script for processing.

Read more about AI Services on <u>Learn the</u> <u>Essentials</u>.

### AI Services – In production (10.1.2)

Artificial Intelligence Services contains different areas:

- Text analysis on incomming Requests.
- Categorization where the service tries to find the best category for requests.
- **Chatbot** for a Chat channel, where the message on the chat is passed on to a script for processing.

Read more about AI Services on Learn the Essentials.

The **pilot program is ending** and from the 1<sup>st</sup> of June 2022 all services will be billable with a fixed price per month per service.

If you have been a pilot you need to contact us to continue with AI Services, since we automatically will cancel your SuperOffice AI pilot-licenses by 31st of May 2022.

If you want to start use it, please contact us.

Read about who to contact and what to do if you want to us AI Services.

# SuperOffice App Store

### Monitor Quote by Keyforce AS (09.09.2021)

Salespeople use SuperOffice CRM Online to support their sales processes. Why force them to learn and use your ERP system just to create quotes? This <u>Monitor Quote integration app</u> allows you to create quotations in SuperOffice CRM Quote. By accessing directly from Monitor, where your product and price catalogs live, the integration ensures you always include the latest and correct product details, discounts, and prices.

When a quotation becomes an order, you place the order in SuperOffice CRM Quote, and the information is automatically sent back to Monitor for invoicing.

This app is an add-on for <u>Monitor Sync</u> and can't be used standalone.

### HoltePortalen by Holte AS (15.09.2021)

With this <u>HoltePortalen app</u>, you have direct access to all valuable information in HoltePortalen; SuperOffice CRM project, project members, companies, contacts, and more entities are automatically kept in sync between HoltePortalen and SuperOffice CRM.

- Synchronize project and project members.
- Synchronize companies and persons.

Mailchimp is an all-in-one marketing platform that

CRM for Mailchimp app, you can use SuperOffice CRM for advanced segmenting and Mailchimp to send

out beautiful emails. Transfer SuperOffice CRM selections to Mailchimp with a click of a button.

your customers and grow your business!

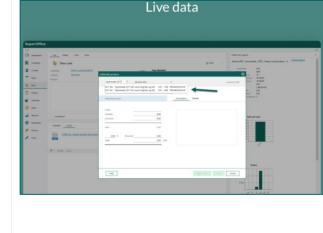
helps you manage and talk to your clients, customers, and other interested parties. With the free SuperOffice

Get this free SuperOffice for Mailchimp app and reach

HoltePortalen directly visible in SuperOffice CRM.

SuperOffice for Mailchimp by SuperOffice InfoBridge B.V. (05.10.2021)

# Seamless synchronized to MailChimp



the manue of	400 A.					
1 PR. da A5						
head -			ie fas			
19.0			**			
100		- 100				
			and the second second			
[ bas ] and matching		station and the			(F) (B) Wisserst	
from Manual Analy		And in State Street in			and the second sec	
Annual of Statements	· and many ·	Approx & Super Justice + replace 4 (and 1 house +)		en berendet som i her	to dome to have and	Holteportalen directly integrated
Statements and statements	(14)		1000	NAME AND ADDRESS OF TAXABLE PARTY.		rioresportateri
A 100 Automation and and and	Information of starting	and a first product a building	12	0.030	1.00	All some sold have been a second second second have been as a second sec
And spinst			12	102020	P 10	directly integrated
A consign	cause an experience		0	14.04.040	A 24 1	an eeu nieegi deedi
from how we wanted and	Conversion of August	And and a second	62	14.000	A 10 10	C. OKI CDM
Therefore and the second		statistics of destruction where	63	water along	Contraction of Contra	SuperOffice CRM
	investor all stage may like \$ \$100	And the second s	10	4410	0.0000	ouper entree entre
American Contractor		and the second second second second	1211	(1993)00	B 400 C	
a series and a series of the s	which we again the set	structure a resignation in the same	10	10.010	CO. CO.	
Exception .			10	1000	COMME	
A Description	-Water-Cont	and state in the state in some the state of		0.000	Concession of the local division of the loca	
444.7.8.19.99	resigned.		12		Colonization of Colonization	
	careere.	terror of size events a second	0	Market.	Constant of Consta	
	- deres and		10111	0.030	00000	
	research .	management of the particular state of the st	12	president.	Colonica III	
		second of some bound of the second	63		111100	
	Alternative (		-	2020	Concession in the local division of the loca	
		managers and address in our spectrum states	12		Party and	
	own exceptions	second a risk party formation in the age of the same	10	11010	COLUMN 1	

### SuperOffice for Microsoft Teams by SuperOffice InfoBridge B.V. (05.10.2021)

Microsoft Teams is a collaboration app that helps your team stay organized and have conversations—all in one place. With the free SuperOffice for Microsoft Teams app, you can now get notifications when something new happens in SuperOffice CRM -directly within Microsoft Teams. No need to waste time flip-flopping between multiple systems; just work where you want with SuperOffice CRM and Microsoft Teams.

Be always informed on what is happening to your customers in SuperOffice CRM and receive notifications within Microsoft Teams. You control on which SuperOffice CRM objects you want to receive a notification on.

Get this free <u>SuperOffice for Microsoft Teams app</u> to make team collaboration even more effective!

### SuperOffice for Slack by SuperOffice InfoBridge B.V. (05.10.2021)

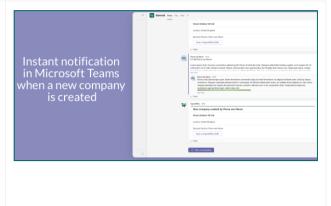
Slack is a digital workplace that connects you to the people and tools you work with every day. With the free SuperOffice for Slack app, you can now get notifications when something new happens in SuperOffice CRM -- directly within Slack. No need to waste time flip-flopping between multiple systems; just work where you want with SuperOffice CRM and Slack. Be always informed on what is happening to your customers in SuperOffice CRM and receive notifications within Slack. You control on which SuperOffice objects you want to receive a notification on.

Get this free <u>SuperOffice for Slack app</u> to make team collaboration even more effective!

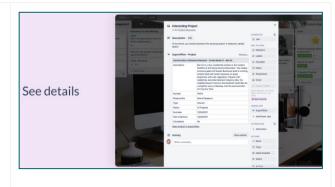
### SuperOffice for Trello by SuperOffice InfoBridge B.V. (05.10.2021)

Trello is a collaborative work management app designed to track team projects, highlight tasks underway, show who they are assigned to, and detail progress towards completion. With the free SuperOffice for Trello app, you can bring information about sales opportunities, leads, contacts, and projects to your Trello cards.

Get this free <u>SuperOffice for Trello app</u> and have your favorite work management and CRM tool together at last.

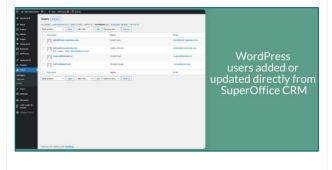






### SuperOffice for WordPress by SuperOffice InfoBridge B.V. (05.10.2021)

WordPress is used for over 75 million websites, ecommerce and e-learning solutions. With the free SuperOffice CRM for WordPress app, you can import contact details to create or update WordPress user accounts and give your customers, suppliers, students or prospects access to role based content, your ecommerce store or your



e-learning portal.

Get this <u>free SuperOffice for Wordpress app</u> and grow your business!

### Echobot connect by SP softwarepartner GmbH (05.10.2021)

With the <u>Echobot CONNECT app</u>, you get access to contacts, contact details, financials, latest company news, and trigger events on prospects or existing customers. Above all, you benefit from efficient company and contact synchronization.

Enrich a single company name to receive a complete and up-to-date company record in seconds and synchronize relevant contacts with GDPR-compliant contact data – directly in your SuperOffice CRM environment.

Try it free for 14 days; no commitment required.

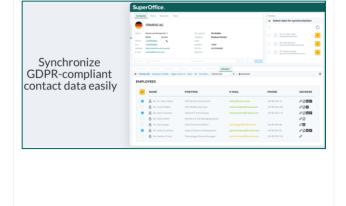
### Leadinfo by Leadinfo (05.10.2021)

With this integration, you can easily link Leadinfo to SuperOffice CRM. After installing the integration, a button is added in <u>Leadinfo</u> to send leads to SuperOffice CRM. The website visits are synchronized with SuperOffice CRM, as well as URL, address, and phone number.

Try it free for 14 days; no commitment required.

- Assign leads to different colleagues.
- Company details such as address, telephone number, and website are automatically sent.
- Website visits are automatically synchronized and added as a note in SuperOffice CRM.





### SuperOffice for WebEx by SuperOffice InfoBridge B.V. (16.12.2021)

Webex by Cisco is a collaboration app that helps your team stay organized and have conversations all in one place. With the free <u>SuperOffice for Webex</u> app, you can now get notifications when something new happens in SuperOffice CRM directly within Webex.

- SuperOffice CRM notifications for companies, projects, sales and service tickets.
- Real-time notifications are instantly visible in your team's Webex channel.
- Celebrate sales as soon as they are marked as sold.

### Visma Fenistra sync by Keyforce AS (06.12.2021)

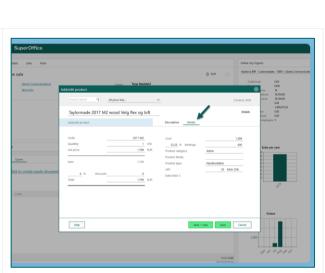
<u>Fenistra Sync</u> lets you connect your cloud-based SuperOffice CRM with your Fenistra solution. Connect SuperOffice CRM projects with Contracts in Fenistra and present key information from objects and areas directly in SuperOffice CRM.

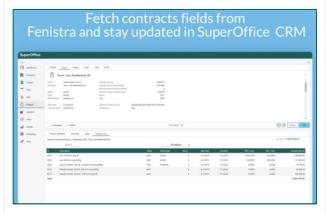
- Connect existing SuperOffice CRM Projects to your Fenistra contracts.
- All information in SuperOffice CRM Project will be updated when making changes in Fenistra.
- View Objects and Area on contracts directly in SuperOffice CRM.

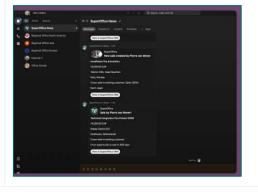
### Xledger quote by Keyforce AS (02.12.2021)

Salespeople use SuperOffice CRM Online to support their sales processes. Why force them to learn and use your ERP system just to create quotes? This <u>Xledger Quote</u> integration app allows you to create quotations in SuperOffice CRM Quote. By directly accessing Xledger, where your product and price catalogs live, the integration ensures you always include the latest and correct product details, discounts, and pricesWork in SuperOffice CRM Quote and fetch price details directly from Xledger in realtime.

- Be confident that prices and quotes are correct and up-to-date.
- All product lists and price lists from Xledger are available in SuperOffice CRM Quote – no need to update and manage two lists.
- Transfer order details directly to Xledger by clicking a button in SuperOffice CRM. No double entry. No need for salespeople to work in your financial system.







### Bisnode RiskGuardian for SuperOffice by i-Centrum AB (08.02.2022)

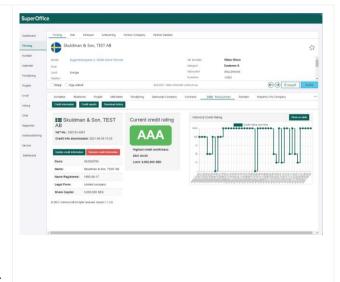
With the Dun & Bradstreet RiskGuardian for SuperOffice CRM app, you will be able to see a company or person's credit rating history directly in SuperOffice CRM.

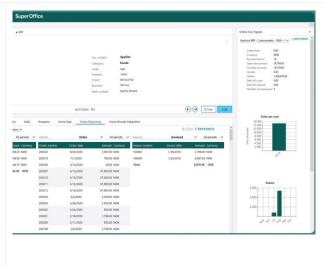
- View credit rating and rating history.
- Market leading risk evaluation model, AAA.
- View and download full company report with extensive credit data.
- Covering all Nordic markets.
- Five interface languages (Swedish, Norwegian, Danish, Finnish, English).
- View in SuperOffice company card via extra fields on credit information.
- Receive real-time updates on important credit information so that you can take action in time.

### Uni Economy Sync by Keyforce AS (28.01.2022)

Uni Economy Sync lets you connect your cloud-based SuperOffice CRM with your cloud-based Uni Economy solution. It will synchronize customer data and present key financial information, such as invoice data or outstanding orders, in SuperOffice CRM Online.

- Connect existing SuperOffice CRM companies to your Uni Economy customer/supplier lists.
- Create a new Uni Economy customer/supplier from within SuperOffice CRM.
- Connect existing SuperOffice CRM contacts to Uni Economy contacts.
- Create new Uni Economy contacts from within SuperOffice CRM.
- View transactional data from Uni Economy for any customer/supplier/project in SuperOffice CRM.





### Sparebank 1 Regnskap sync by Keyforce AS (03.05.2022)

SpareBank 1 Regnskap Sync lets you connect your cloud-based SuperOffice CRM with your cloud-based SpareBank 1 Regnskap solution. It will synchronize customer data and present key financial information, such as invoice data or outstanding orders, in SuperOffice CRM Online. When you integrate data from your ERP solution with SuperOffice CRM, you will enjoy:

- Big savings on time: no more searching for customer data in more than one system and no need to learn or update two systems.
- Improved working experience: respond and act on customer dealings with a full 360-degree view of the customer in one place.
- Better data quality: update customer data one time only, as new information is automatically synchronized to the other system. Less room for errors and out-of-date information.

### DNB regnskap sync by Keyforce AS (03.05.2022)

DNB Regnskap Sync lets you connect your cloudbased SuperOffice CRM with your cloud-based DNB Regnskap solution. It will synchronize customer data and present key financial information, such as invoice data or outstanding orders, in SuperOffice CRM Online.

- Connect existing SuperOffice CRM companies to your SpareBank 1 Regnskap customer/supplier lists.
- Create a new SpareBank 1 Regnskap customer/supplier from within SuperOffice CRM.
- Connect existing SuperOffice CRM contacts to SpareBank 1 Regnskap.
- Create new SpareBank 1 Regnskap contacts from within SuperOffice CRM.
- View transactional data from SpareBank 1 Regnskap for any customer/supplier/project in SuperOffice CRM.

