SuperOffice AS

What's New in SuperOffice 8

SuperOffice AS – Research and Development

Updated: 31 October 2016

More options, made simple

Developing new products is a lot about looking into the future. Predicting it. Shaping it. When we sit down and plan our next product release, we try to ask and answer key questions such as; “Which products and services will meet the needs best now, and in the future? Which features will excite our users and let them enjoy their CRM tool even more? Do our new ideas stay true to our vision of personal productivity and everyday fun? What do our customers ask for and what are they not asking for? What and how can we improve? “

We are proud to present this new release of our software, SuperOffice 8. We have focused on looking into the future, and at the same time retaining a grip on today and not forgetting our past. This new version contains improvements of existing features and some brand new ones to put a smile on your face. It has a new fresh look and feel, it is more responsive, faster, and more flexible and offer more options than ever.

One of the questions we also asked ourselves was: “How do our customers want to buy and use our software in the future?” More and more people prefer to subscribe rather than buy software. The majority of new customers prefer to use our software in the cloud instead of on their own server. We have therefore made all our products available in the cloud, letting online be an option for anyone who chooses to.

To make subscription and cloud options more flexible, SuperOffice 8 comes with five specific user plans, each containing the features you need dependent upon the key business processes you have as a user have. With these specific plans, you choose the plans your users need and pay for those only. You have more options, simply put.

Read about all the details of the new user plans, features and options available to you in this document. Let’s take on the future in a more fun, productive and friendly way.

Contents

Summary of Highlights

SuperOffice 8.0 - is the current major upgrade of the SuperOffice CRM platform.

Major news in this version:

- Updated and improved user interface
- Improved diary / calendar
- Major performance improvements on the web clients
- Improved mail merge and e-marketing
- Improved Service client

Additional minor features:

- The invitation dialog will not pop up automatically - New invitations will be shown as an icon in the UI
- New Quick reply to answer a ticket
- New navigator in the Service client

Additional features and functions in the Service Releases will be added in the document where the chapter name will include the service release number.

New User plan

SUPEROFFICE

Licence information	In use	Free	Total
(No Selection)	11	39	50
Complete CRM User	0		
Standard CRM User	0	30	30
Marketing User	0	30	30
Sales User	0	30	30
Service User	0	30	30
Windows App	11	29	40
Travel	7		
Remote Travel	1	0	1
Pocket CRM	0	50	50
Outlook Synchronizer	0	1	1
Sale Quote Access	4	76	80
Confidential activities	7		
Reporter Studio	11		
External user administrator	4		
Anonymous user admin	3		
Publish to external	3		
System user administrator	7		

In SuperOffice 8 we have introduced user plans. That will give our users an easier understanding of what the licences are used for and better use of the licenses.

The new user plans are:

- Complete
- Standard CRM
- Marketing
- Sales
- Service

User licenses only available for Onsite:

- Windows App
    - Travel
        - Remote travel
    - Reporter Studio
- Anonymous user administrator
- External user administrator
- System user administrator
- Publish to external (Audience)

Site licences only available for Onsite:

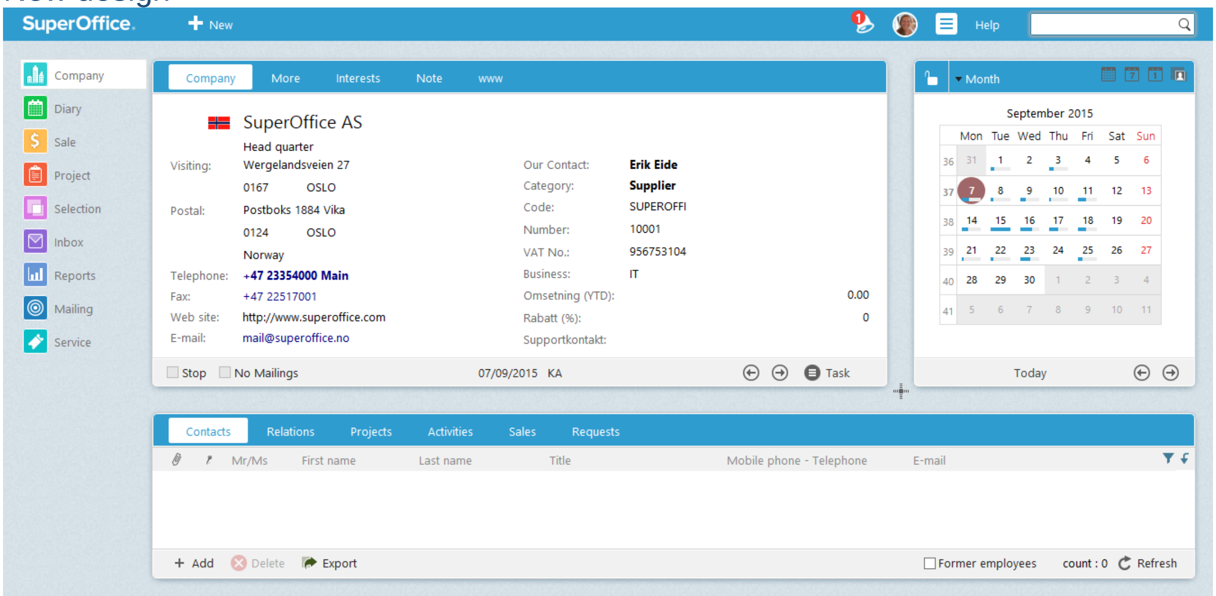
- Satellite

System licences only available for Onsite:

- Area management
- Reporter Studio
- SuperOffice Expander Services
    - Data Exchange
    - Expander for Collaboration
    - Expander Tools

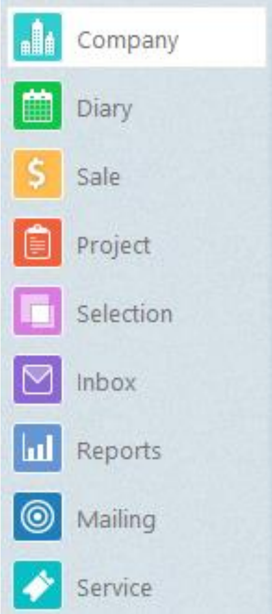
New Design

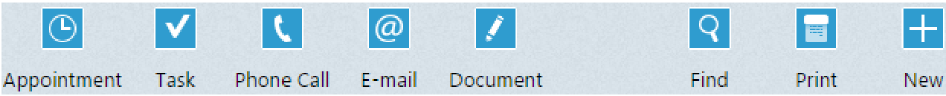
New design



The new interface is updated to a modern palette with powerful colours that is pleasant to your eye and work with. At the same time it has retained the good and reliable workflow you are used to.

New icons





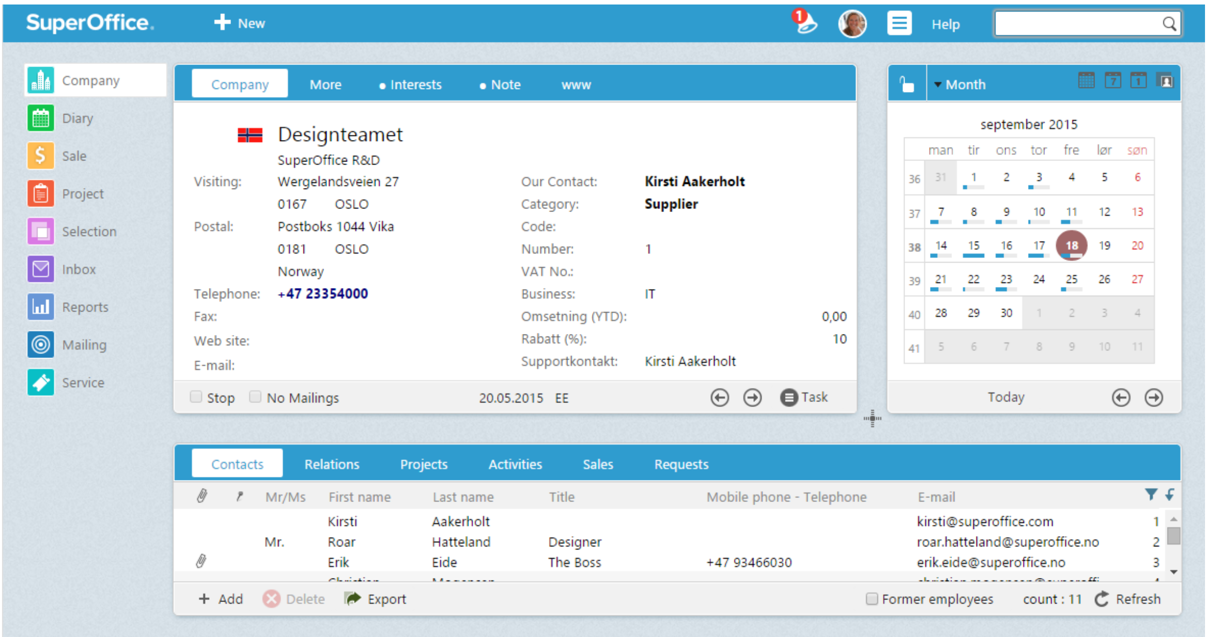
The amount of details in the icons has been reduces. This makes them even easier and faster to recognize.

New top bar

We have added a top bar where you find easy access to key functions and settings for your user. This is always available in the top of the screen and therefore always accessible to you. Read more about what functions that are available to you from this top bar later in this document.

New and Improved Standard CRM

New user interface

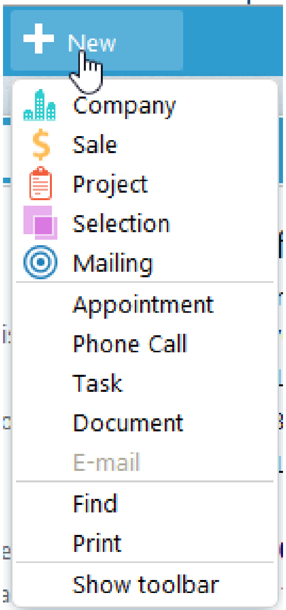


All the main functions are still in the same place in the client as before – you will recognize it, but we have given the design a brush up.

Top bar

- SuperOffice logo – opens the local SuperOffice website
- New button – see details under
- Notification – see details under
- Personal settings – see details under
- Main menu – see details under
- Help – shows a menu with different help like Help, Technical Support, Feedback, eLearning and SuperOffice Community, and the About dialog that shows SuperOffice version etc.
- Freetext – the search in the top right corner

New button in Top bar

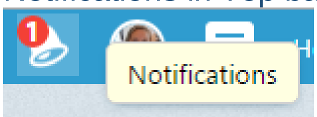


This new button is literally called **New** because it lets you create new items quickly in all main areas in SuperOffice.

When you click on the button it shows a drop down menu with items to create new main cards and activities together with **Find** and **Print**. The item for **Show toolbar** is an On/Off check mark to show the same buttons in the bottom screen underneath the archive.

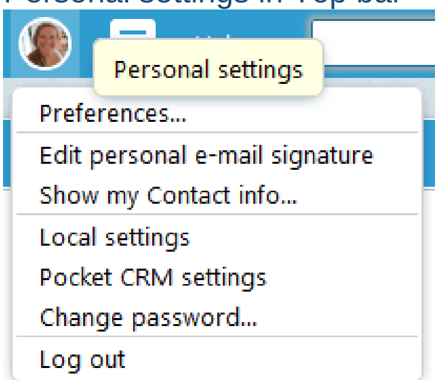
This way you can create new items fast and directly without having to move to that section first.

Notifications in Top bar



Notification button will show if you have any unseen invitations waiting for a response and clicking it will open the Invitation dialog. The **Invitation** dialog will no longer appear without your action to click here, so you are in control of when to view invitations.

Personal settings in Top bar

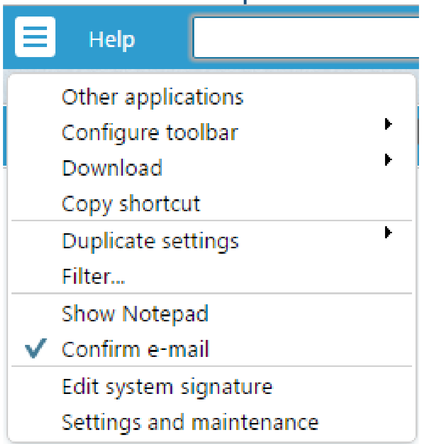


If you added an image in your own contact card, this will appear on the **Personal settings** button. The **Personal settings** shows a drop down menu for **Preferences**, **Show my Contact info**, **Local settings**, **Pocket CRM settings** and other settings for your user account.

If you use the Windows client, you will also see **Phone preferences**. The Web client users find Phone preferences in the general Preference dialog.

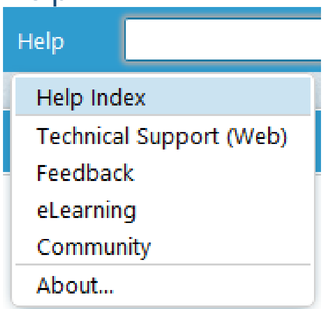
Pocket CRM settings is only visible for the Web client and for those users that has a Pocket CRM licence.

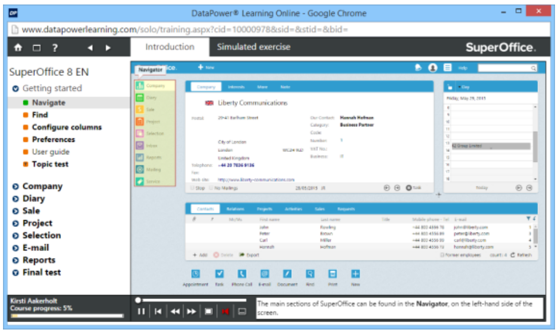
Main menu in Top bar

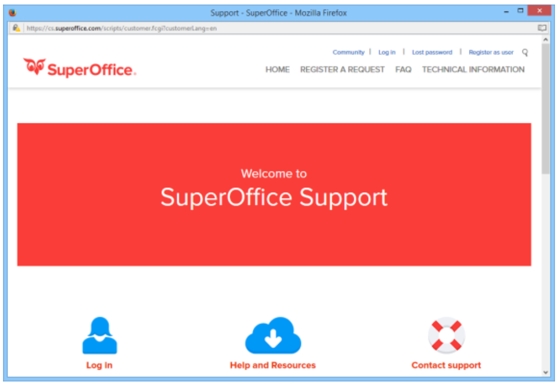


There is a **Main menu** icon available for the Web client users only. This gives you a drop down list when you click on it for easy access to a range of features previously available in the Edit and View list from the File menu. It also offers access to the administration module **Settings and maintenance**.

Help







You have the **Help** index easily available from the **Help** button in the **Top bar**, but remember that pushing the **F1**-keyboard button always will give you context sensitive help from where ever you are in all our clients.

Technical Support link will open up our Support Centre on your local language.

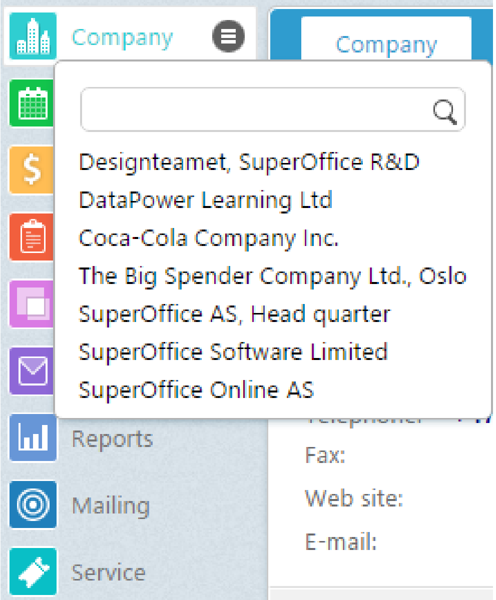
Clicking on the **Feedback** will open a web page where you can give us a suggestion, report a bug or other.

The **eLearning** link will open a windows with our eLearning course. There you find videos and explanations for the CRM client.

Click the **Community** link and our community will be opened for you. Here we have added a lot of useful information, tips and tricks and guides on how use our clients better.

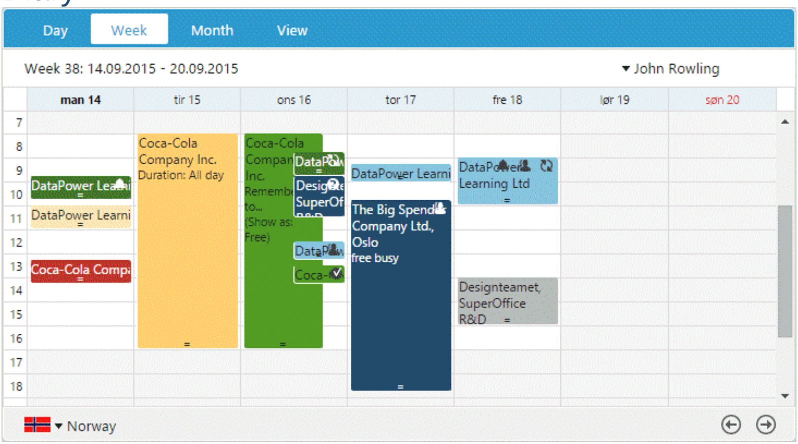
The **About** dialog will appear to show you the version you are running, your company, name and role. This is very useful for our Support team to give you the best help.

Navigation



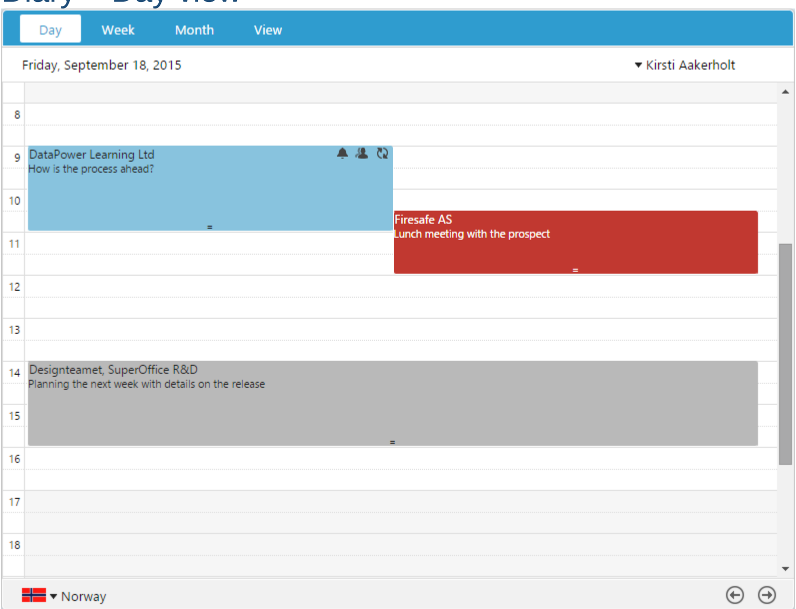
It's a new look on the navigator and drop down menu. The hover on navigator will show a task button behind the text. This is more intuitive for you that a menu will appear when clicking the task button or the text. Clicking the navigator icon (like the company icon) will, as before, quickly go to your current view – in this example the current company card.

Diary



The diary is more dynamic, quicker and offers better viewing of multiple overlapping appointments. It's even easier to move appointments by drag and drop on the diary cards or to the mini card diary view (like **Month**, **Day**, **Week**). You will also see the start and end time for appointment when moving or creating an appointment. This is especially an improvement for the Web client.

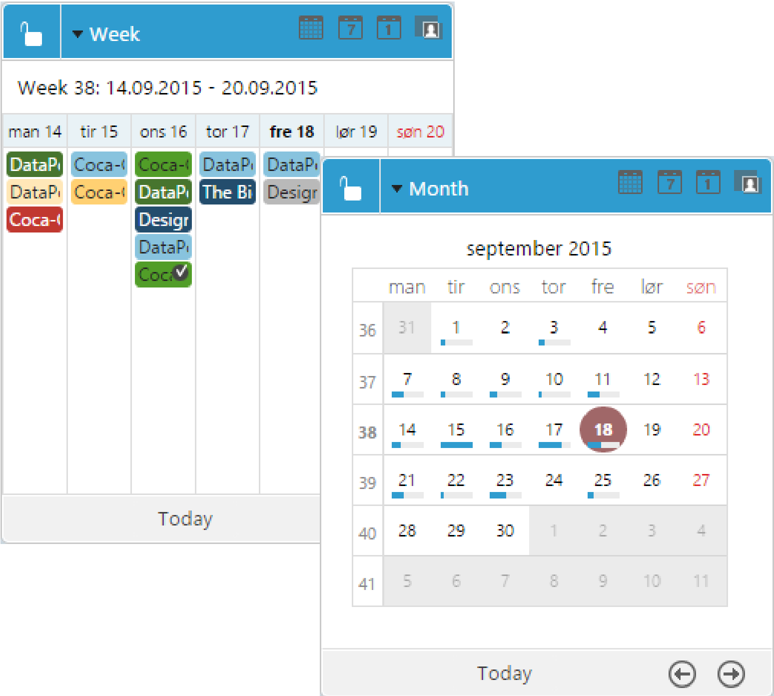
Diary – Day view



The Day view is now one column only to give you a better overview of the day.

It's now very easy to detect overlapping follow-ups in the Day view. And when you have overlapping appointments you will see more of each appointment.

Mini card

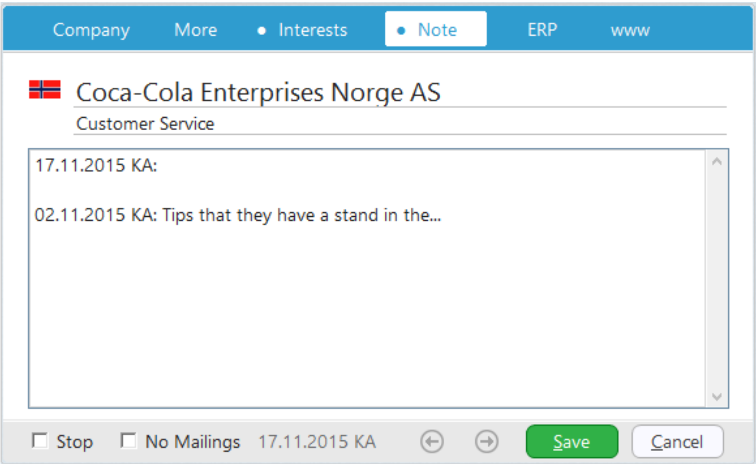


Mini card for **Month**, **Week**, **Day** and **Next day** is especially an improvement for the Web client. These views are changed to be more responsive, when resizing, and with improved performance.

The **Month** view will give you a better feel of how full your day is with the progress bar showing percentage of filled diary in the office hours.

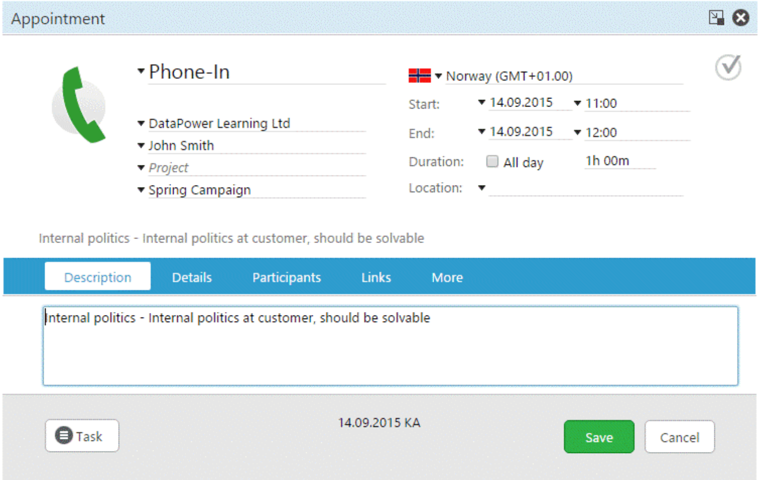
The **Week** view has a new look and feel where the appointment are stacked showing more details than before.

Note is moved to a tab



The **Note** on **Company**, **Sale** and **Project** is now its own tab. To change the note you have to enter the edit mode. A dot in front indicates if there is a note added in the same way you are used to with the **Interest** tab.

Completed icon on activities



You have a new and bigger check box to tick when you have completed a task. You find it at the top right corner in the dialog, and the icon is grey for not completed and green for completed.

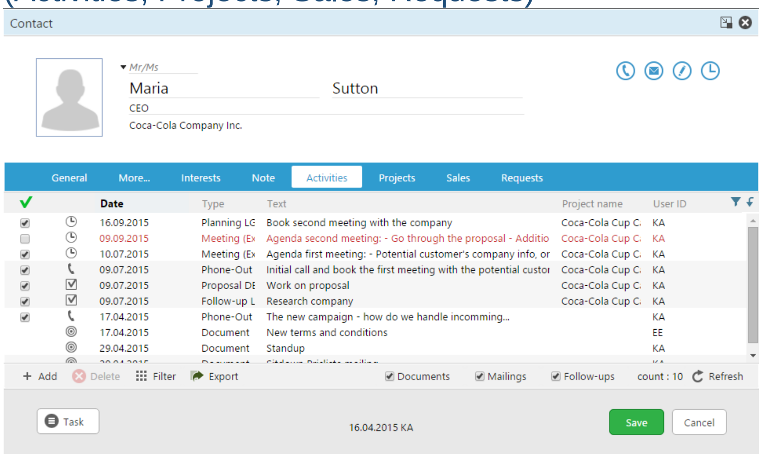
Not completed

Hover effect

Completed

The old **Completed** check box has simply moved to the **Details** tab and clicking on one, automatically ticks off both. And of course you can still right-click on an activity and choose to set it to complete from the drop down menu.

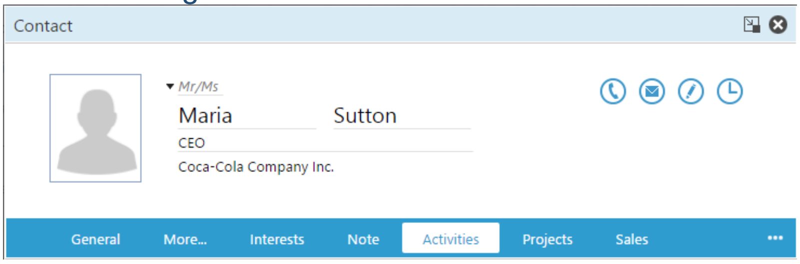
Person dialog with new tabs (Activities, Projects, Sales, Requests)

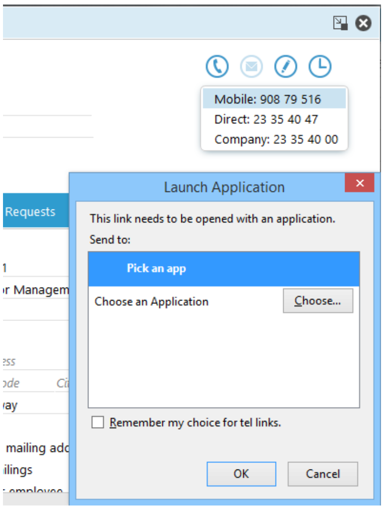


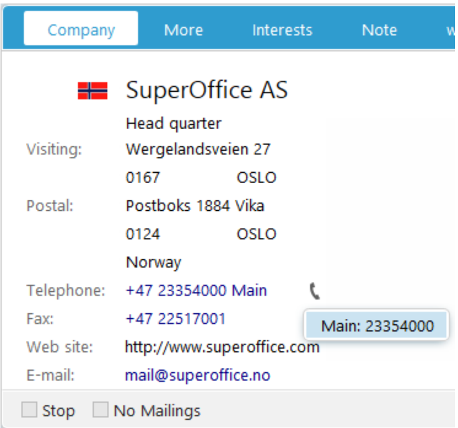
On the **Contact** dialog there has been a wish for a long time to include tabs for **Activities**, **Sales**, **Projects** and **Requests** related to that specific person.

Those tabs are now implemented and ready for you. Use them to sort out and find information faster or simply get new overviews of what is going on.

Person dialog with action buttons







New action buttons have appeared on the **Contact** dialog to make the most used actions directly available for you.

The action buttons are:

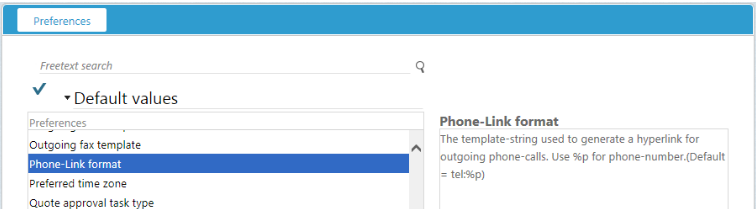
- Call
- Write an e-mail
- Write a document
- Create an appointment

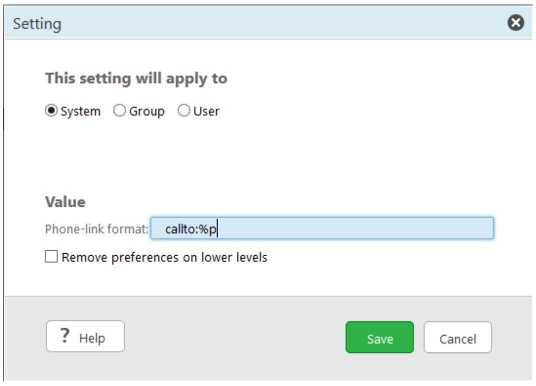
You can also select an app or other executable programs in the phone selection on the **Contact** dialog if no preference is added for your user.

The call button will use different technology for the Web and Windows client. The Web client has a new preference for phone settings (only visible in Preferences in Settings and maintenance on Default values: Phone-Link format). The setting in the Windows client is as before (visible on Phone preferences in the Personal settings menu).

It is also possible to call from the company card with the phone button by the phone number and from the Contact archive when you show some of the columns for the phone numbers.

Preferences for Phone in Web client



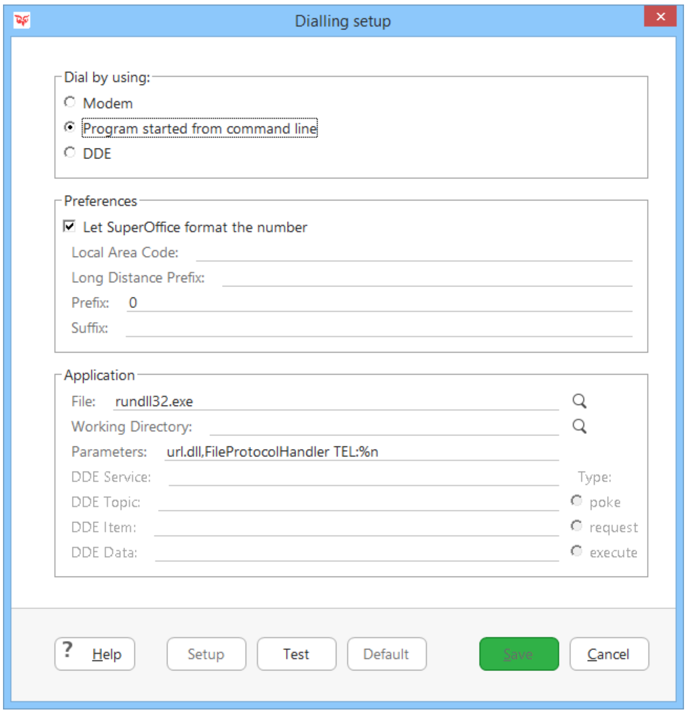


In the Web client you can, if you have installed IP phone, Skype or Facetime, set up Phone to call. You will see a new preference in the Preferences, on the Default values section with the name **Phone-Link format**.

You add one of the three different settings to use the phone system that is best for you (or user groups, system or specified users). The different types for the settings is:

- IP phone: tel:%p
- Skype: callto:%p
- Facetime: facetime:%p

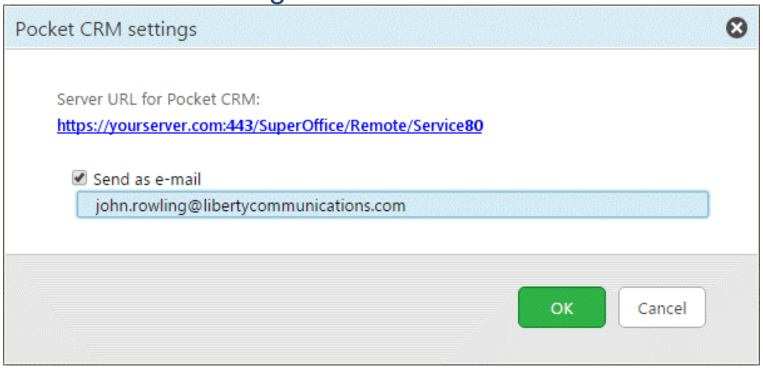
Phone Preferences in Windows client

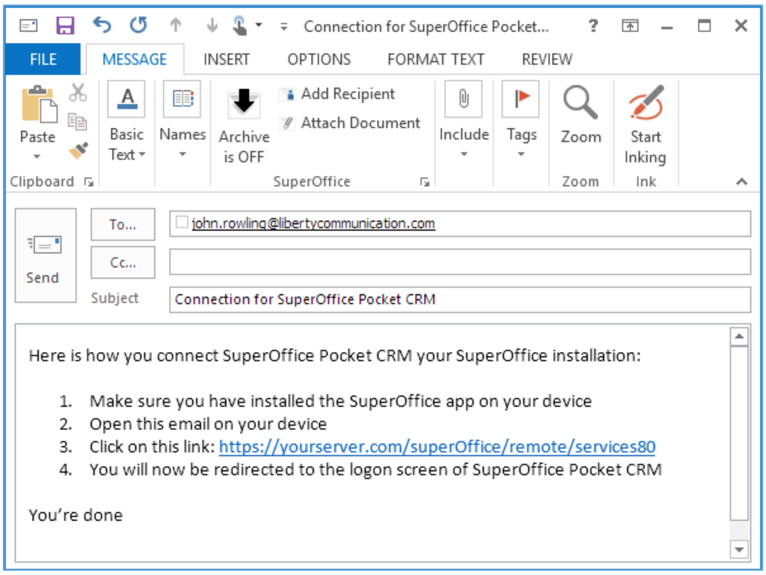


In the Windows client there is a specific preference only for Phone settings. This will work similar as for Web, but there is a few more places you have **Call-to** functionality

- IP phone: url.dll,FileProtocolHandler TEL:%n
- Skype: url.dll,FileProtocolHandler CALLTO:%n

Pocket CRM settings

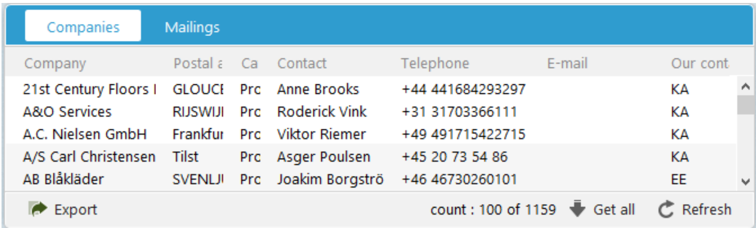




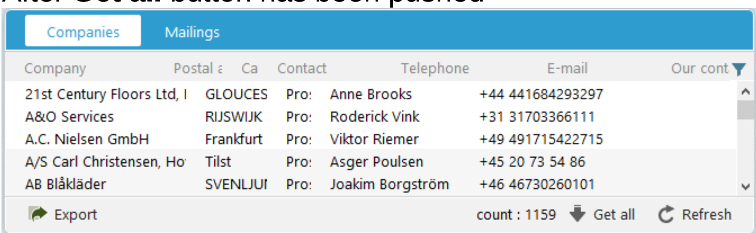
In the Web client the **Pocket CRM settings** in the Personal settings menu is visible for those users that has a Pocket CRM licence.

The dialog will show you the configuration URL for your Pocket CRM installation. You first install SuperOffice Pocket CRM from your app store. The link in the Pocket CRM settings dialog is the one you use to configure the Pocket CRM installation after installing the app. You can either start your Pocket CRM application and write in the Server URL, or send an e-mail to you or other associates in your company and then clicking the link in the e-mail will start and configure your Pocket CRM installation.

Selection – Get all button in .web



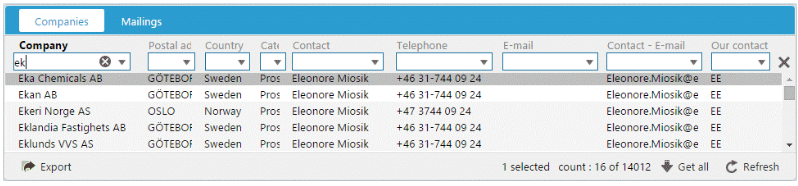
After **Get all** button has been pushed

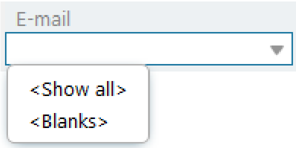


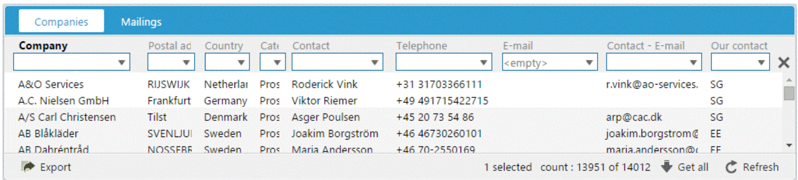
The archives in the Web client usually loads 100 lines at a time which has been about optimising the performance. However, when working with large selections this is very time consuming so we have optimized this feature in the selection to give a better user experience. The feature **Get all** will load all the selection members and then cache it on your computer. With this feature you can easily scroll up and down and also change the sort order of the selection without the need to load the selection again.

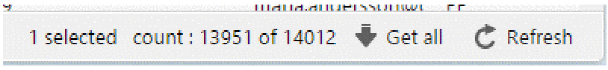
A preference is added for auto-load of the selection (Functions – **Limit for auto-loading**), the limit default it's set at 500. That means if the selection has less than 500 rows, all rows are loaded automatically.

Selection – Filter on archives







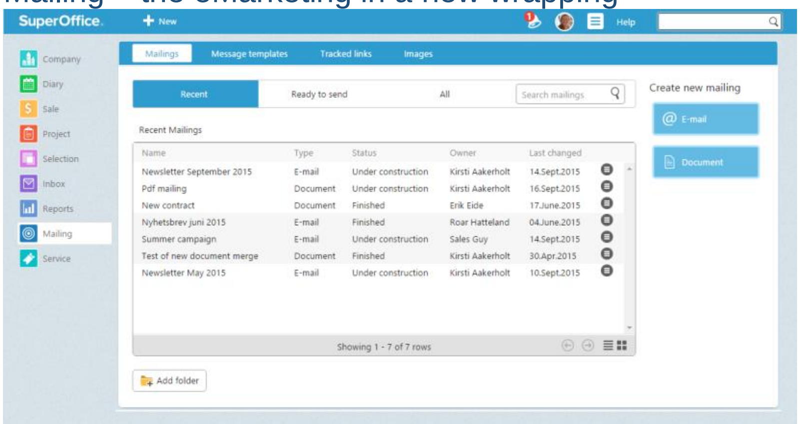


Another new feature to make it easier to work with selections is a filter added to the selection archive. We have heard your feedback that you would like to not only configure the columns but also filter on the specific columns in the archive tab. So this is what we have added.

The new filtering option is added in Selection archives. With this filter option you can now filter on specific columns in the archive. The filters options are <Start with> (by writing something in the field), <Show all> and <Blanks>. It's a lot easier for you to remove/filter out all blank e-mail addresses etc. When selecting multiple items in the list, you will see the count on selected items.

It is important to note that to get the new filter function, you need to load the whole selection by clicking the **Get all** button, as explained earlier.

Mailing – the eMarketing in a new wrapping

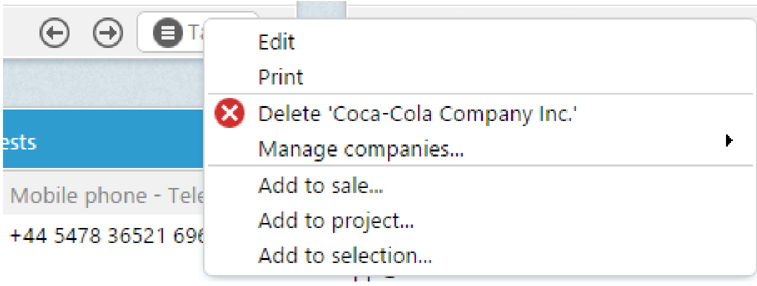


The **eMarketing** function has gone through a name shift to **Mailing** and a redesign to make it a lot easier to use. The feature is available in both the CRM and the Service client. See the chapter New Mailing for more details.

Task button

Windows client

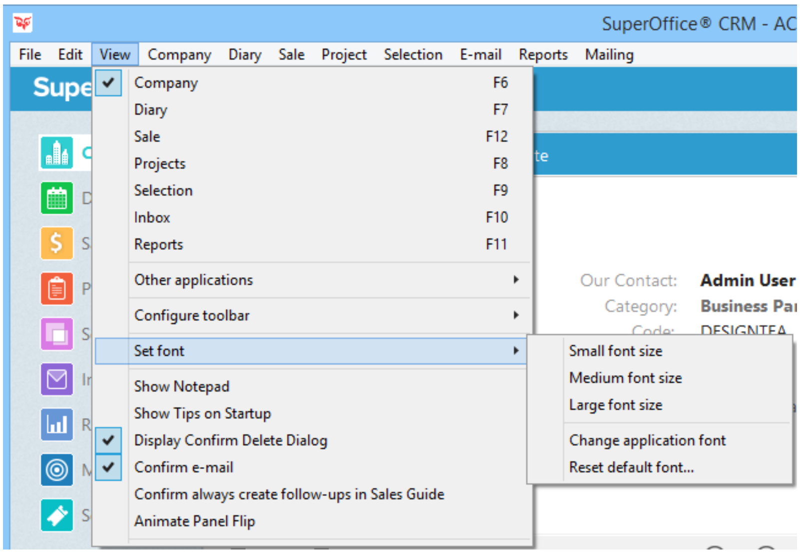
Web client



The Windows client has still the **Edit** button on all main cards, since it still has the File menu available.

In the Web client there is now a **Task** button on all main cards. That task menu contains **Edit**, **Delete** and other specific menu items. Since this version has "lost" the File menu, all menu items regarding the different main cards has been moved from the File menu to the **Task** button.

Font size in Windows

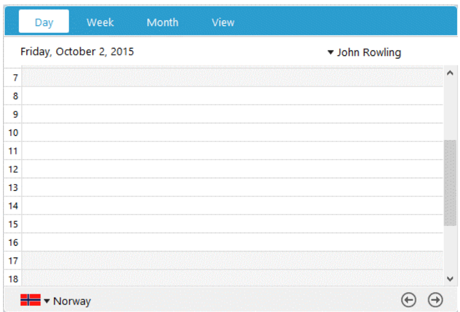


In the Windows client you will see Set font on the **View** menu in the **File menu**, this is a new option to select different font sizes.

The **Set font** option lets you choose between 3 different sizes: Small, Medium and Large. Whatever that suits you most. You can also choose your own font in the **Change application font** dialog if you have other preferences. It's also easy to go back to the default font by selecting the **Reset default font** option.

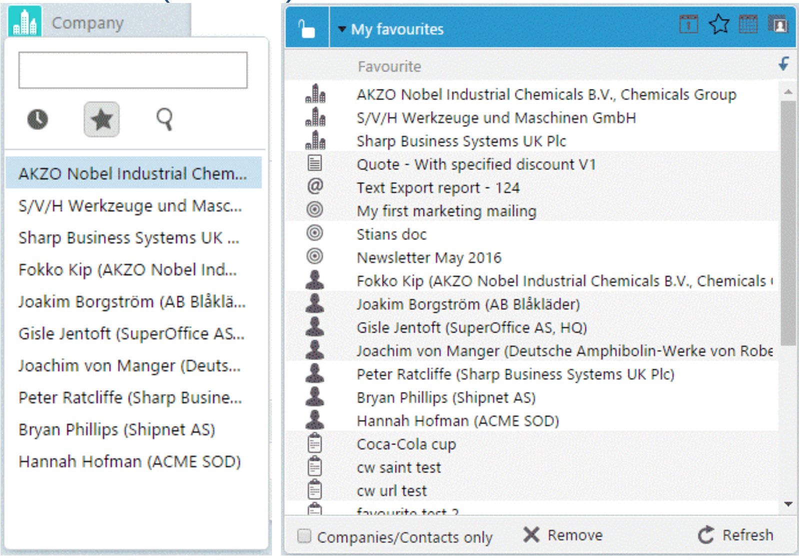
In the Web client you can zoom in/out in the browser to get larger/smaller font.

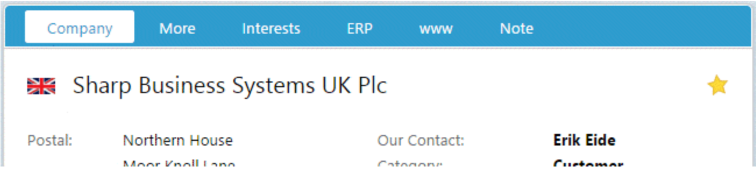
Removed form Web client – Diary Day Note

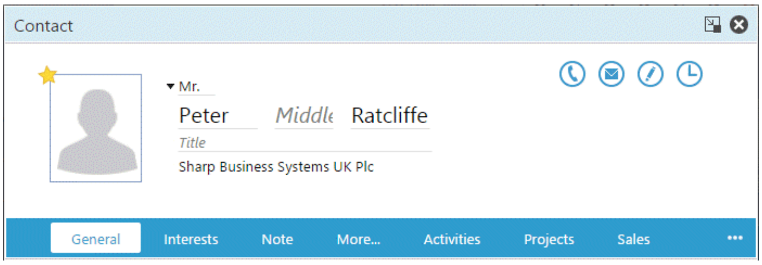


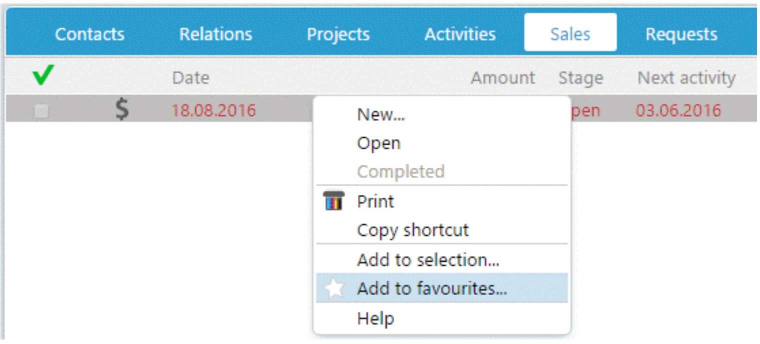
Diary – Note on **Day** view in the Web client has been removed.

Favourites (8.0 SR2)









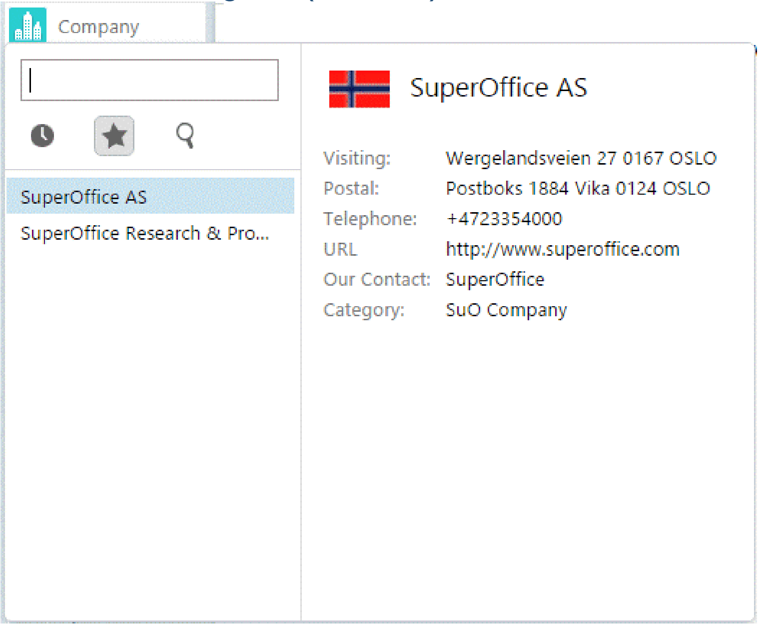
With just one click you can add a company as a favourite and easily find them afterwards. A star is added on company, person, sale, project, selection and document. Favourites added in Service will also be available in the overview. Just click the star in the main card/dialog or right click an item in the archives and select **Add to favourites**.

In the navigator menu a favourite tab is added, with easy navigation from the menu where ever you are in the application.

As addition a new mini card has been added for **My favourites**. There you can show the different favourites for the main card type you are on, or you can show all your favourites by checking on/off a checkbox.

In the Windows client you also have the dialog **My favourites** that will show your favourites, same information as in the mini card.

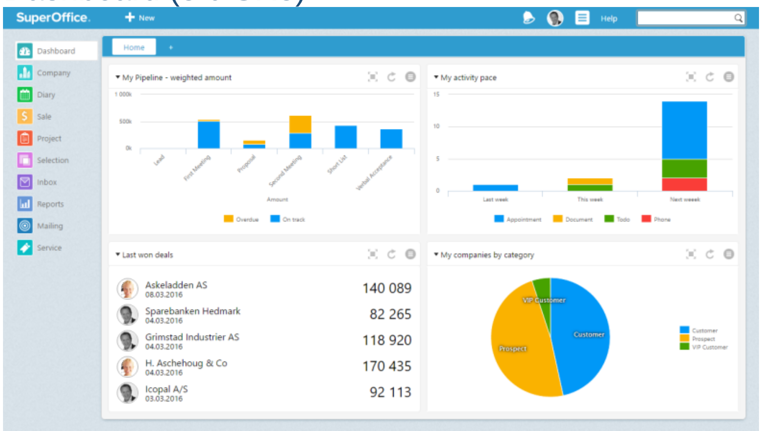
Preview in Navigator (8.0 SR2)

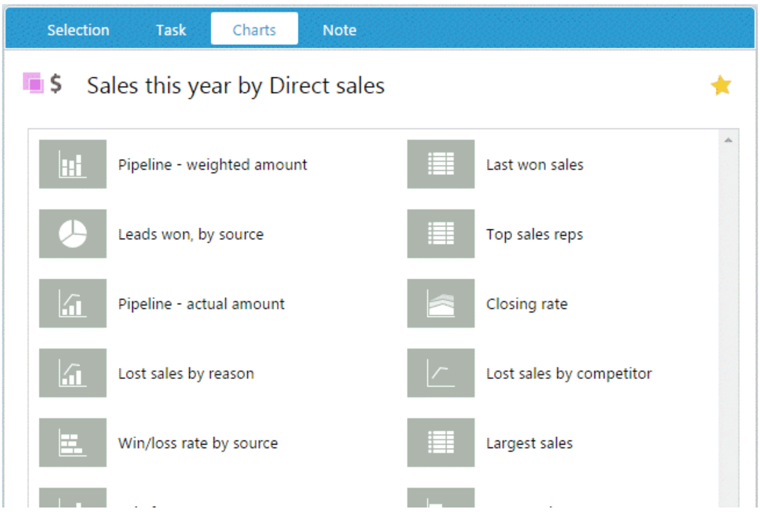


When using the **navigator** to search, use your history list or favourites it is sometimes very useful to get more information than just the tooltip.

With the **preview** you will get more details and easier to navigate to the correct item.

Dashboard (8.0 SR3)





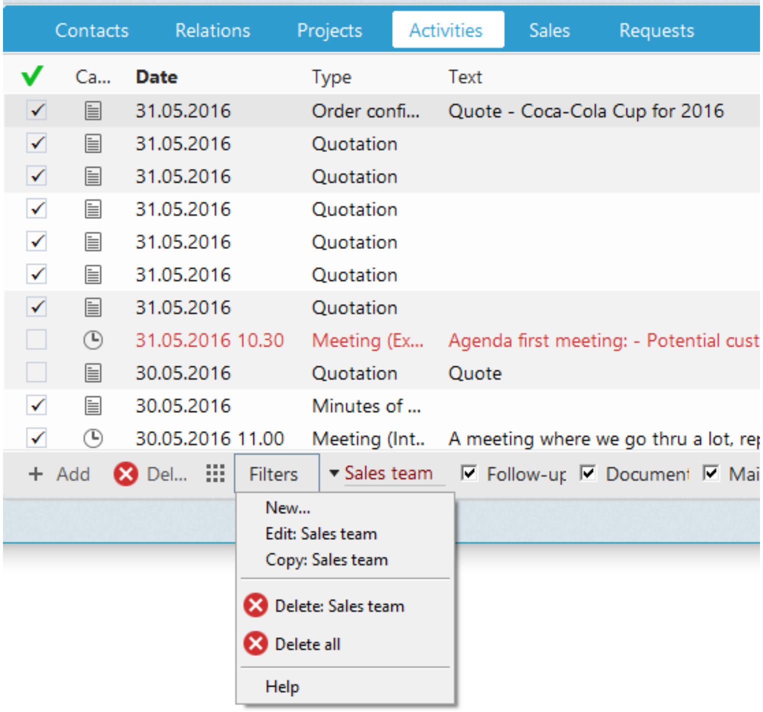
A new feature is added and that is **Dashboard**! That is available with the first navigation button in the application.

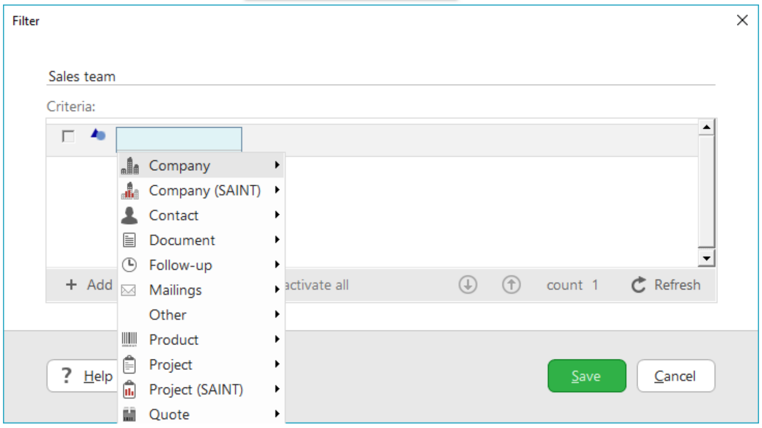
You will start off with a set of default tiles in the **Home** tab. You can change the tiles and add more than one tab of tiles with different layouts and information. Just click the **+** button by the **Home** tab, select wanted layout and then add the different tiles that you like.

In addition to the new main card **Dashboard**, you will also get a new tab in Selection for **Charts**.

Depending on selection type, different tiles will be displayed in the **Charts** tab. Find the wanted selection and select the tile you want to see your selection as data details, and a chart will open as a dialog.

Filter control in archives (Windows) (8.0 SR3)



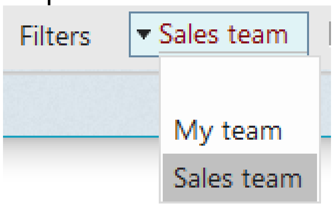


On all archives you can show a special filter control. With this control you use criteria to select what you would like to show in each archive. And you can make as many filters you like.

To show the Filter control on archive, right click on the archive header and select Show filter control.

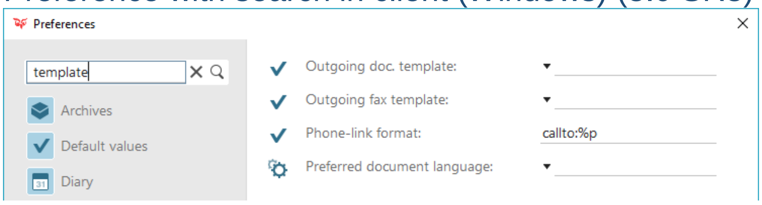
Click on the filter button to create a new filter for the selected archive. You use the criteria system to create the filter you like.

You can create multiple filters, but only one can be active at a time. To show everything in the archive without any filters, just select the empty line in the drop down on **Filters**.



You need to select to show the filter on each archive you want the extra filter function, since the archives all contains different fields and therefore also different criteria

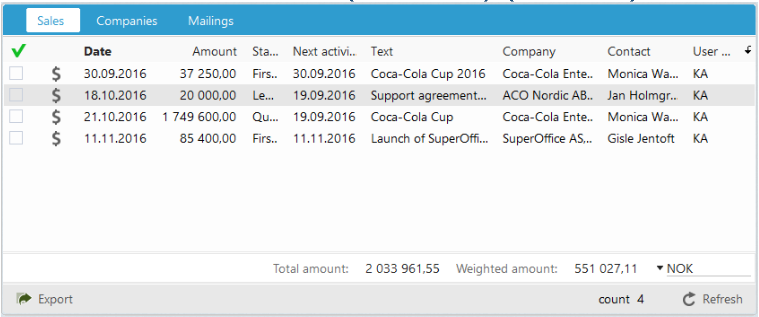
Preference with search in client (Windows) (8.0 SR3)



It's easy to find the wanted preference with the search field in the preference dialog.

Write part of the preference in the **search** filed in the top left corner in the **Preference** dialog and the result will be shown in the section to the right. You will also see an icon that indicate the preference group.

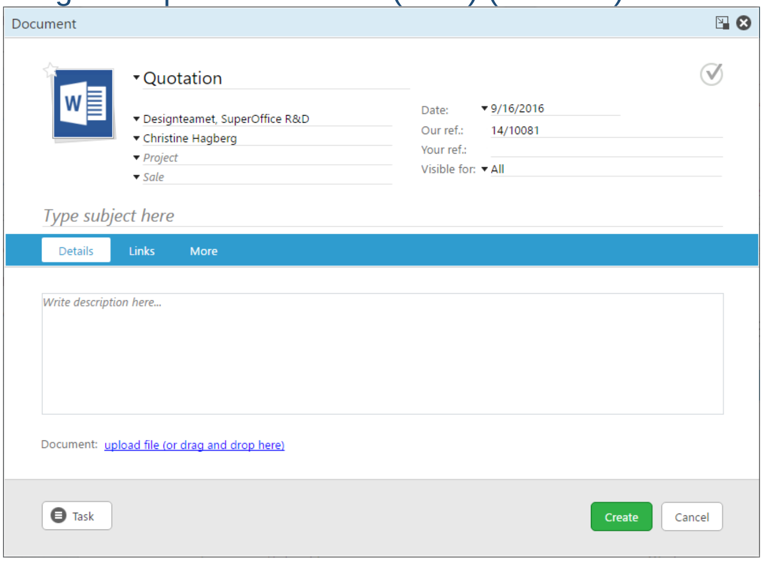
Totals in sales archives (Windows) (8.0 SR3)

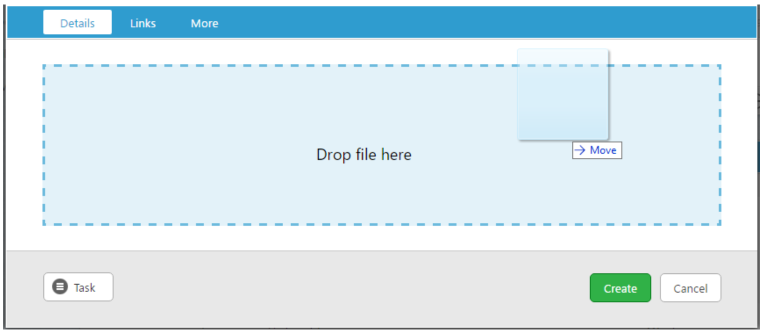


By right clicking on the header on a sales archive you can choose to **Show Totals**. With this on you will get an extra footer with the **Total amount**, **Weighted amount** and **Currency** (if you use it).

Selecting different currency will show the totals in the correct value.

Drag & Drop of documents (Web) (8.0 SR3)



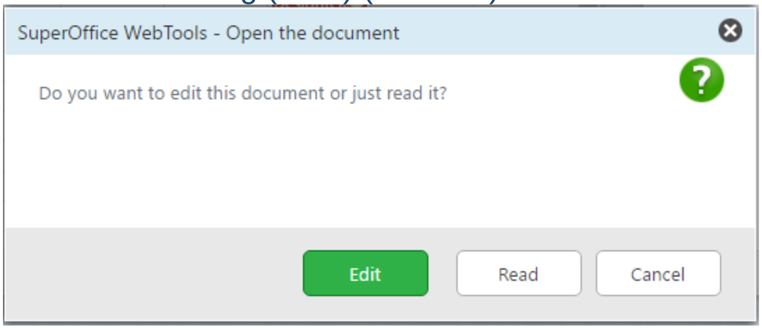


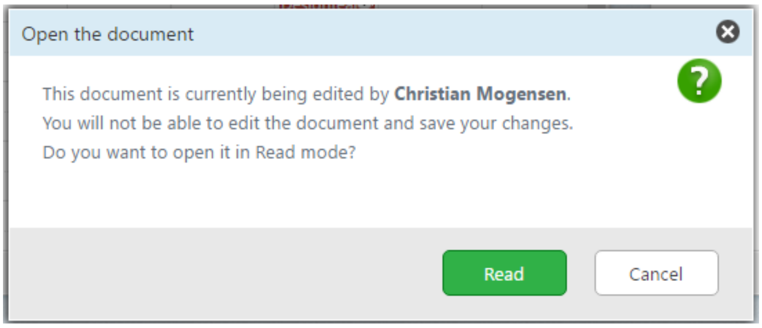
You can upload documents to SuperOffice just by drag & drop documents from your computer.

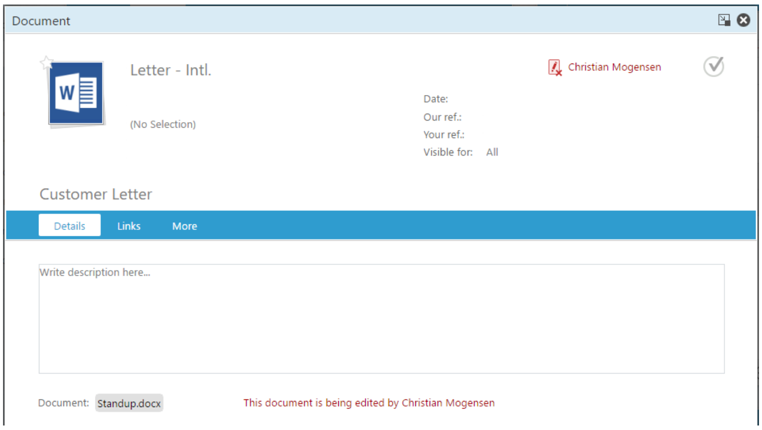
To upload a new file, you can now either browse to your file or just **drag & drop** the selected file into the Details area of the **Document** dialog.

Very easy to understand where to drop the file when the whole **Details** area changes into a drop zone.

Document locking (Web) (8.0 SR3)







Opening an existing document when you are using **Web tools**, you will automatically get the question if you want to **Edit** or **Read** the document.

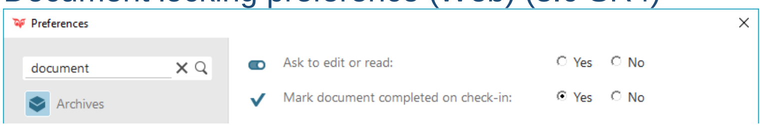
If you click **Edit**, the document is automatically locked for other users. The user can still open the document, but only in read mode.

This is to prevent that more than one user edits the same document, since the last changed document wins, it will overwrite new information made by others.

When opening the document dialog, you will also get information about **who edits** the document for the time being.

As soon as the user has saved and closed the document, other users will be able to open the document for edit.

Document locking preference (Web) (8.0 SR4)



A new preference “Ask to edit or read” will give you the possibility to set if the document locking should ask each time what you want to do.

By default, with Web Tools, it’s set to No, so the dialog will not appear when opening a document and the document opens in “edit” mode. If Web Tools is not installed, the dialog will always open.

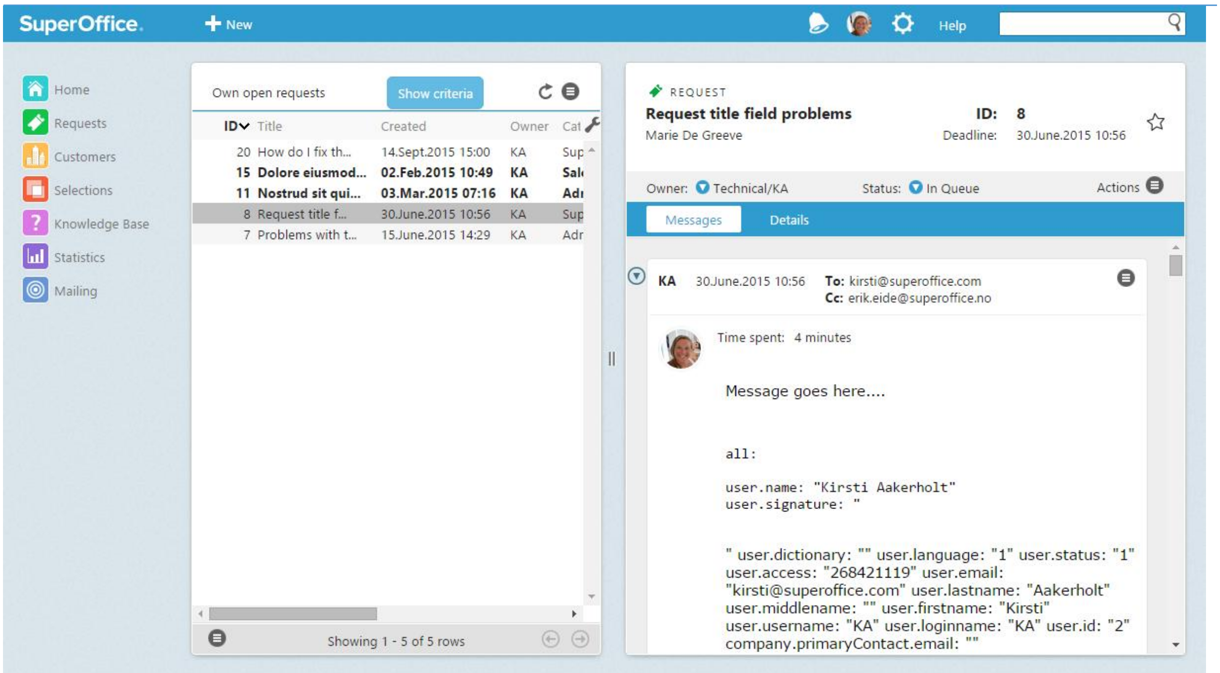
Windows and Web application – Overview of the differences

There will always be some differences in the Windows and Web client

- The **File menu** is kept in the Windows client, but not in the Web client. Therefor there are some differences in the Windows client:
    - The **Main menu** button will not show in the top bar (the button to the right of the Personal settings menu).
    - It's an **Edit** button on the main card and not a **Task** button that Web client has. The Windows client shows different tasks in the **File menu** on top.
- The Web client – Main cards – The button for **Edit** has changed to **Task** button. The **Task** menu now shows all items earlier listed in the **File menu**. The **Task** menu will be different on each main card.
- The Web client – Selections archives has the **Get all** button to load the whole archive.
- The Web client – Selection archives has new **Filter** option
- The Windows client – Font size and type is possible change from the **File menu**.
- The Win client – Font size can be selected by using the browser zoom option.
- Phone preferences – Two different places to add for the Windows and Web client.
    - Windows client use the existing **Phone preferences**
    - Web client has new settings in Preferences on Default – **Phone-Link format**

New and Improved Service

New user interface

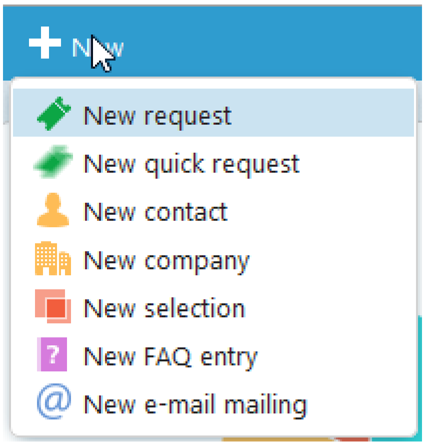


All the main functions are still in the same place as before – you will recognize it, but we have given the design a major brush up. It is now fresh, clean and has the updated visual expression it shares with the CRM client. It is now easier than ever for users who work in both clients.

Top bar

- SuperOffice logo – to open the SuperOffice local website
- New button – see details below
- Notification – see details below
- Personal settings – see details below
- System settings – see details below
- Help – goes to the Help online. You also have the option to give feedback and get the direct link to our Community
- Freetext – the search in the top right corner

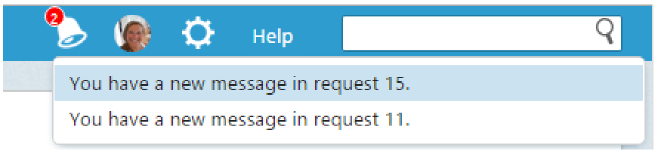
New button – drop down menu to create new items



This **New** button gives you easy access to create a new item from everywhere in the client.

Itself a new feature that gives you more flexibility to choose the way you want to work.

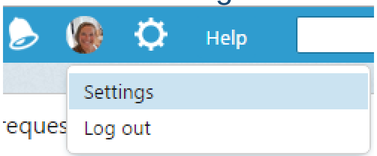
Notifications



The button for notification shows how many unread messages you have. The drop down show the request id of each message.

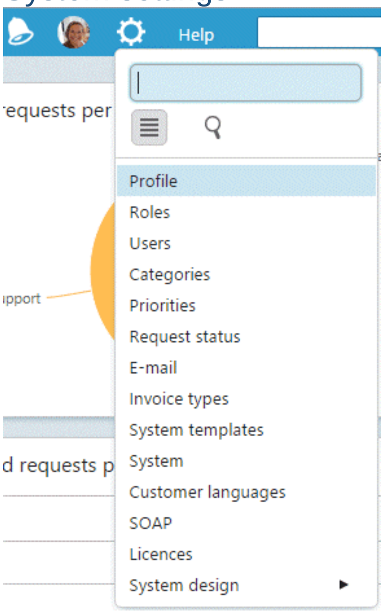
Click on the message ID and you are taken straight to the selected request and can begin working on it. Fast and simple

Personal settings



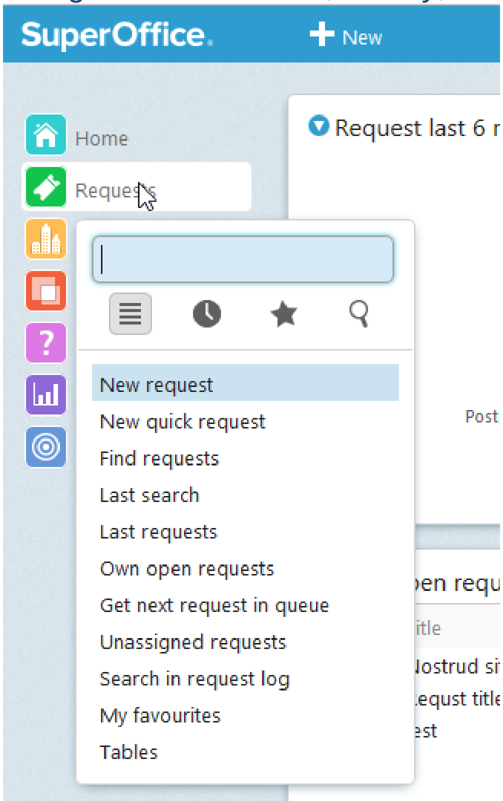
To get to your **Personal Settings** you simply click on your image in the **Top bar** and choose **Settings**. This is also how to **Log out** of the client.

System settings



The button for System settings is only available for the administrator(s). The menu shows all items for system settings and system design.

Navigation with search, history, favourites/hotlist

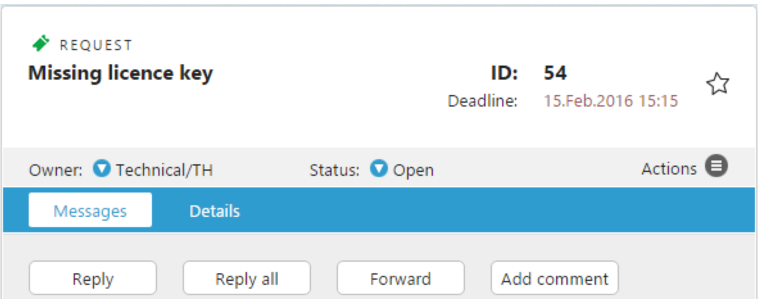


The navigation menu is a lot cleaner that before and has been redesigned to let you find what you are looking for faster than ever. You will see it has had a major clean up. This new way of presenting your option and with less clutter let you find what you are looking for a lot easier.

Once you click on the main menu item you get a search option and some additional buttons/tabs.

Actions/lists – Menu with a list of all navigation items for selected section.
History – Shows the history of last items you visited for selected section.
Favourites – The favourite menu shows you all items that you have added to your hot list for selected section, like my hotlist of requests.
Search – It will give you the possibility to quick search a specific item or more detailed search with keywords (keyword like request title or "1234" that will open request id 1234), and the search result will appear as results in the menu under.

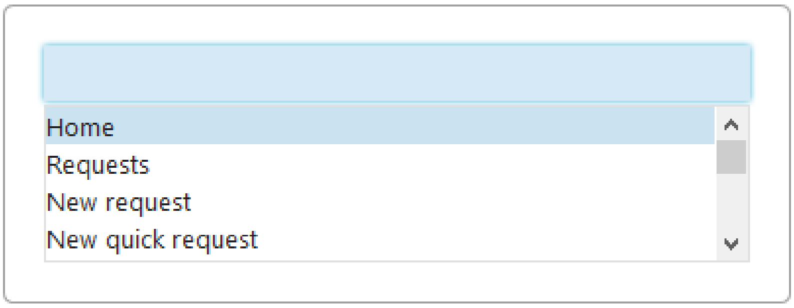
Favourites



Most entities in Service have the ability to be set as a favourite. The different entities is request, company, contact and selection.

On the View entity screen you will see a star to the right in the header. Clicking the grey star will make the star yellow and this entity is visible in the navigator favourite list.

Shortcut search



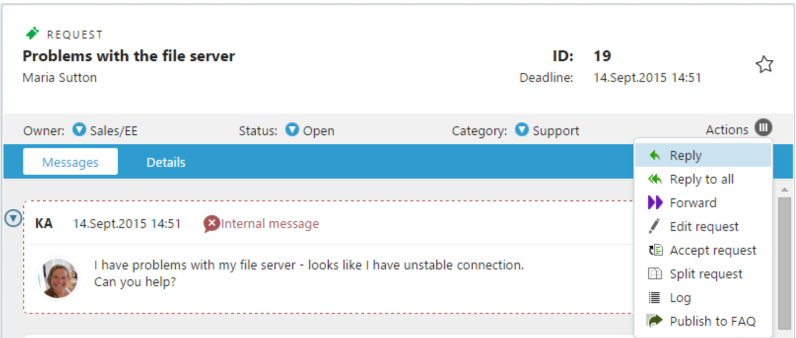
Your feedback told us that quickly finding specific items is crucial; we have added a brand new search feature that lets you instantly search across the system.

You open the **Shortcut search** with a keyboard shortcut “**Ctrl + Space**”.

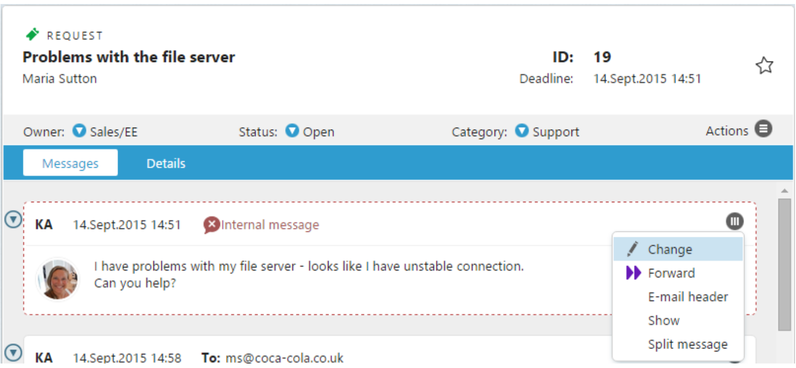
The **Shortcut popup** gives you an instant fast searcher. In addition the list under shows context sensitive menus and all the menu items from the navigator, the Personal settings and System settings. Use the fast searcher to search for requestID, commands, functions, buttons available at the specified item you have opened and menu items available in the client. As soon as you start write a function name, button or a setting menu item, the result will appear in the list under. Use arrow up/down and then Enter to select wanted item.

You can also use the keywords used in the Quick search to search for specific items like contacts (c:), company(o:) and other entities (click search icon in the top right corner for a detailed list).

Menu – Context and Action menus



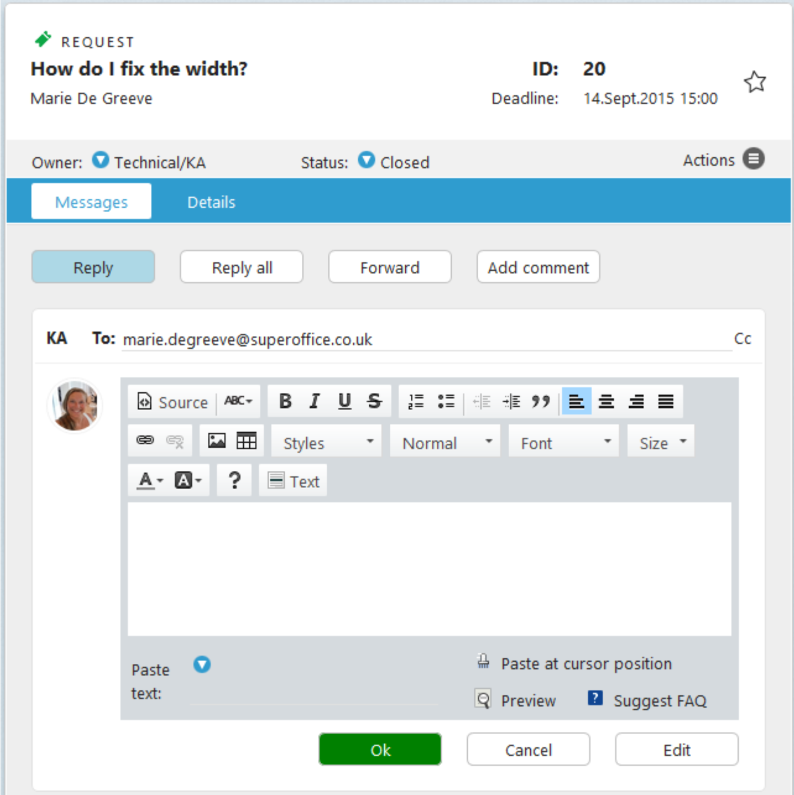
Instead of cluttering up your view with lots of different buttons, we have collated the main actions menu in one place. Click on **Actions** and you can easily choose which action you want to take next. There are different **Action** menus depending on the item you are looking at.



In the **Request** view you get access to direct edit a number of different drop down menus like **Request owner**, **Status** and **Category**. Again, the direct edit menus depends on the different item you look at.

These changes are designed to support your handling of requests more efficiently.

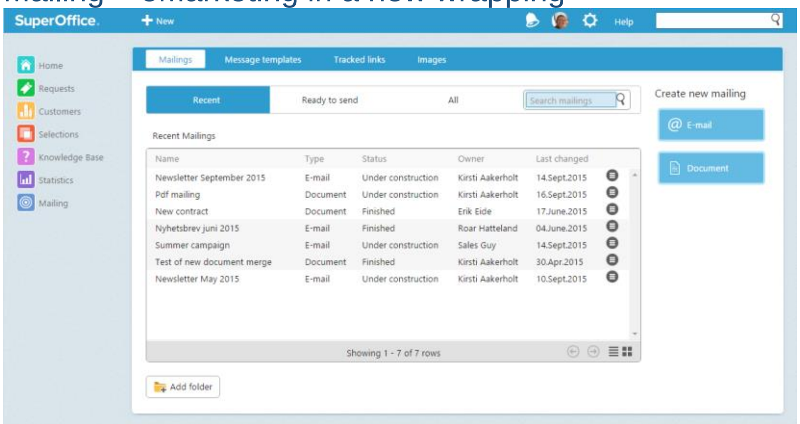
Quick reply on Requests



You will see some new buttons underneath the message window in the **Request** view. These buttons initiates a quick reply box.

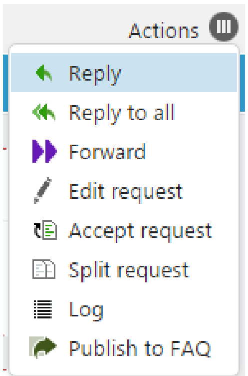
Instead of opening up the full Edit view of the request this button will instead give you a simpler form very fast. So when you just need to send a quick reply, forward or comment the request, this option is your choice.

Mailing – eMarketing in a new wrapping



The **eMarketing** function has gone through a name shift to **Mailing** and a complete redesign to make it a lot easier to use. The feature is available in both the CRM and the Service client. See the chapter New Mailing for more details.

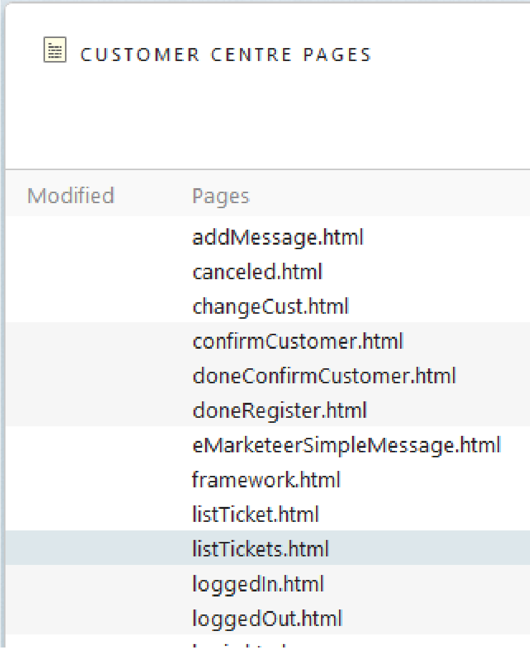
Buttons



In addition to cleaning up the main navigation menus, we did a thorough “spring clean” on the footer of the different views, and moved a lot of buttons to the **Action** button.

The result is a cleaner look in the Service client with less clutter and unused buttons.

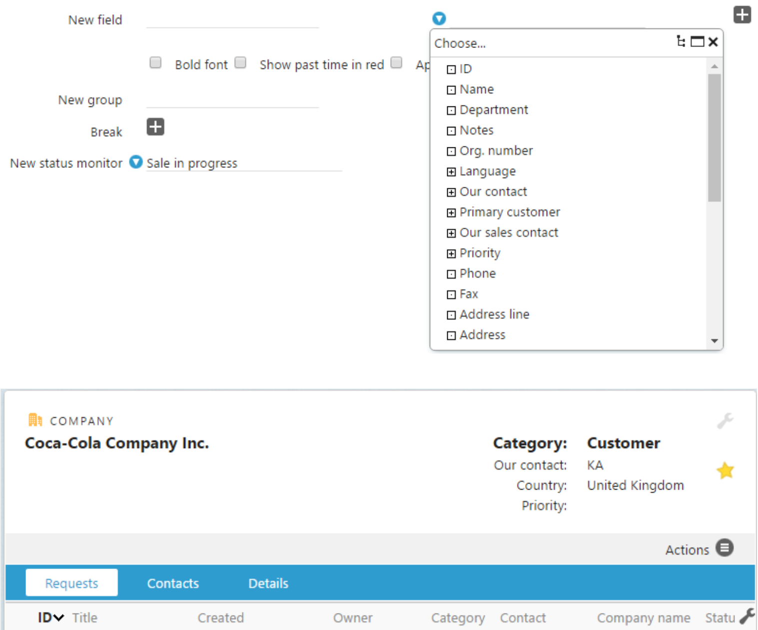
Customer Centre pages



You can easily edit the **Customer Centre** pages. To do so, you simply go to the **System settings** and choose the menu item you want to modify.

Note: This functionality is available only for customers that has a licence for Customer Centre.

Edit header for profiling (8.0 SR3)



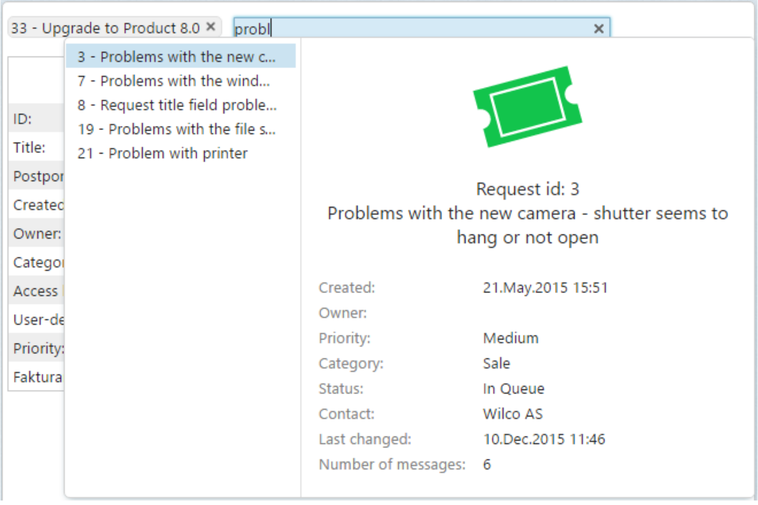
It is possible to change fields in the headers for **Requests**, **Company** and **Person**, you choose the fields displayed so the header is fine tuned to your needs.

Click the **Edit** button and change/add fields you like to view in the header. Like that you can fine tune the header with the fields that is most important for you.

Multiple sessions on browser (8.0 SR3)

You can be logged in as the same user on **multiple sessions** of Service in one browser. Like that you can different tabs with different screens showing with the same user.

Merge request (8.0 SR3)

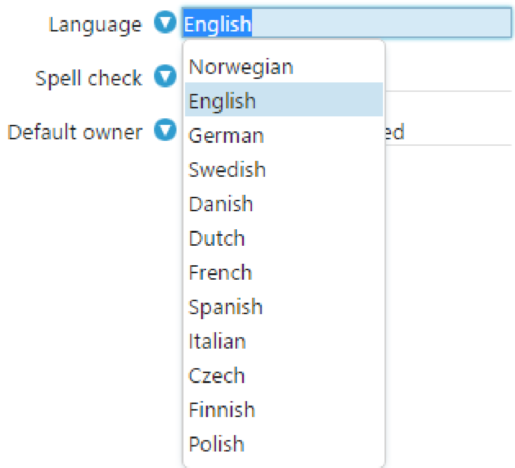


Now it is easier to merge entities when one entity is selected.

Just select the **Merge** from the **Action** list and start write the title of the request you want to merge with.

You can also select multiple request to merge, not only two.

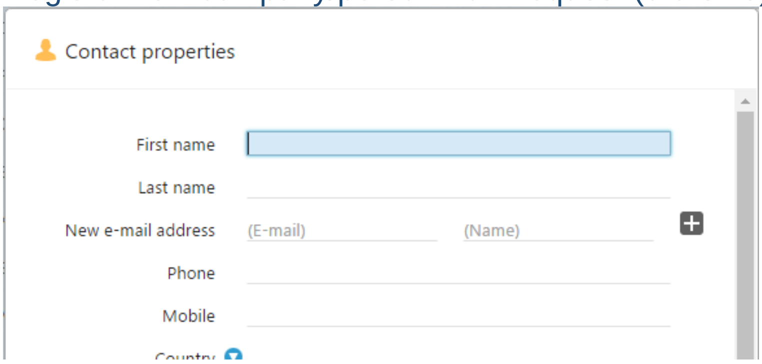
Language support (8.0 SR3)



We have added support for multiple languages. Service can now be used on all our **B-languages** as well as our A-languages
B-languages is:

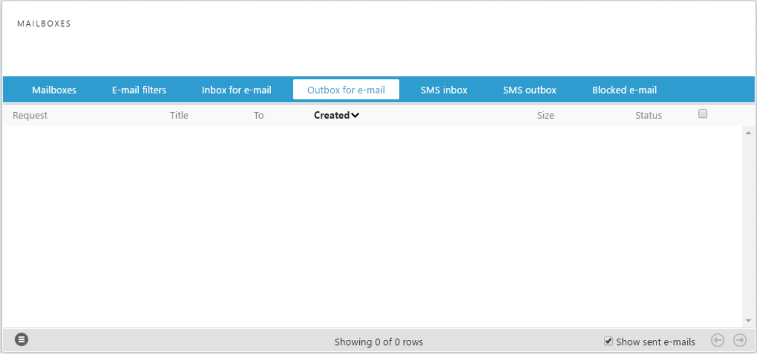
- Czech
- Finnish
- French
- Italian
- Polish
- Spanish

Register new company/person from request (8.0 SR3)



When creating a **new request**, it's easy to **create a new person** just by clicking the + button. A dialog opens and you can add the same fields as you do from the ordinary Create new person, where you also can create a new company if it does not exist.

System settings – E-mail (8.0 SR3)



The overview of **Outbox for E-mail** includes check boxes for **Show sent e-mail** on Request in the archive footer.

It’s easy to see that request has actually been sent, or see how many requests that has been this day.

Performance

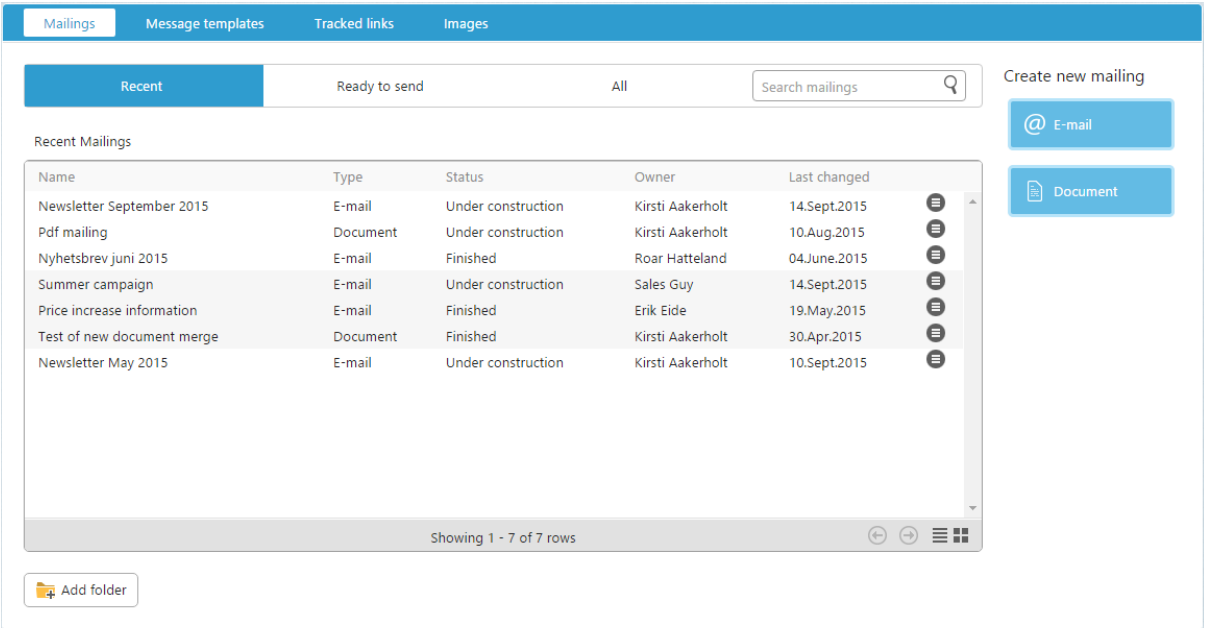
General focus on performance throughout the client, for example quicker view of screens like view a request, fetching data, viewing data and static selections.

Security

Focus on security permeates everything we do, in the same manner as we aim to focus on simplicity and user-friendliness throughout our products. We continuously focus on tightening security risks and changes.

New Mailing

New user interface



The Mail Merge wizard in Sales & Marketing 7.5 was easy to use, but not adapted to modern marketing needs with poor support for e-mail and text messages. The eMarketing module in Customer Service 7.5 was advanced but not the easiest to use, the guiding of the user does not give a successful conclusion. Since their introduction to the market, the need of a modern marketer has evolved and mailings have become the norm for non-marketers' too. We now wanted to offer *everyone* a much easier way to create and send a mailing from start to finish. In addition, we wanted to offer users a better support for e-mail and SMS messages than available in the previous version.

We have therefore replaced the entire eMarketing module and the Mail merge functionality with the new **Mailing** function, which is available for both CRM and Service clients.

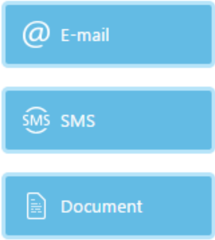
This new Mailing feature has simplified the process of creating a new mailing, to make it more accessible and faster to use for everyone. Whenever you want to create a mailing, whether you want add a document, e-mail or send SMS, your starting point now is step 1 in the new **Mailing** workflow (SMS is only available for Onsite).

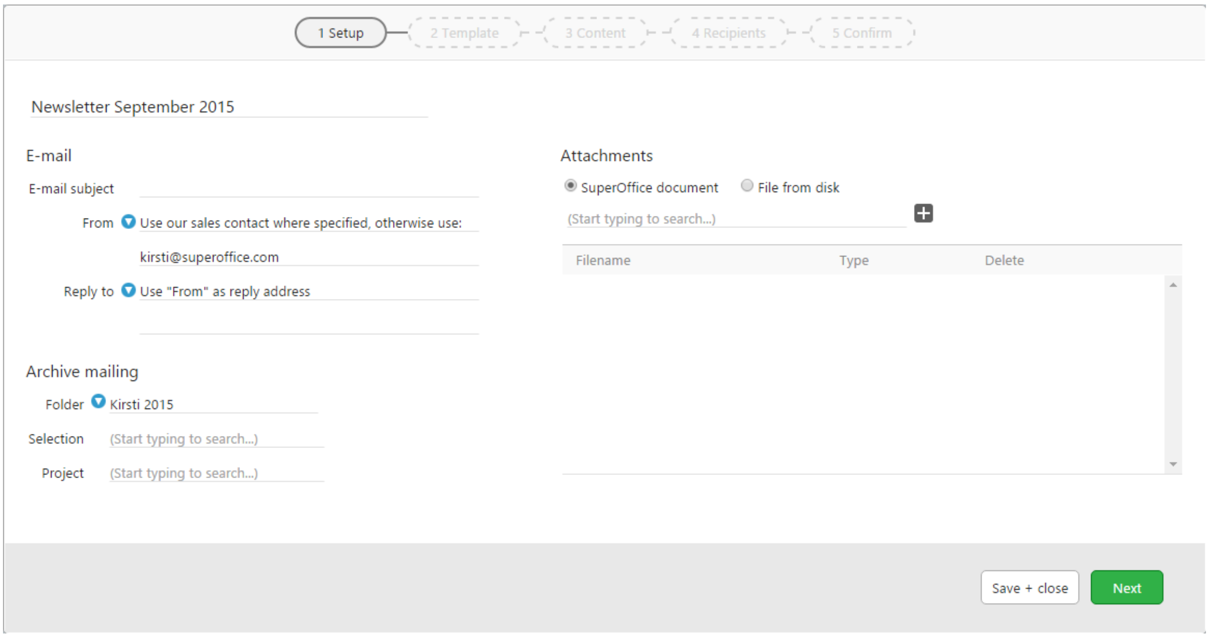
We wanted to improve the **Mailing** function in **Service** and use it to replace the mail-merge wizard in CRM selections. We have also extended the Mailing function to support Standard CRM word mail-merge, so that you can generate personalized word document that is automatically converted to a PDF for easy printing.

Every mailing is archived, whether it's under construction or completed. This lets you find and review any of your mailings whenever you want. Furthermore, we have compiled the archives into **Mailings**, **Message Templates**, **Tracked Links** and **Images** to make the different components in a mailing more accessible. Read more about each feature below.

Workflow for create/edit mailing

Create new mailing

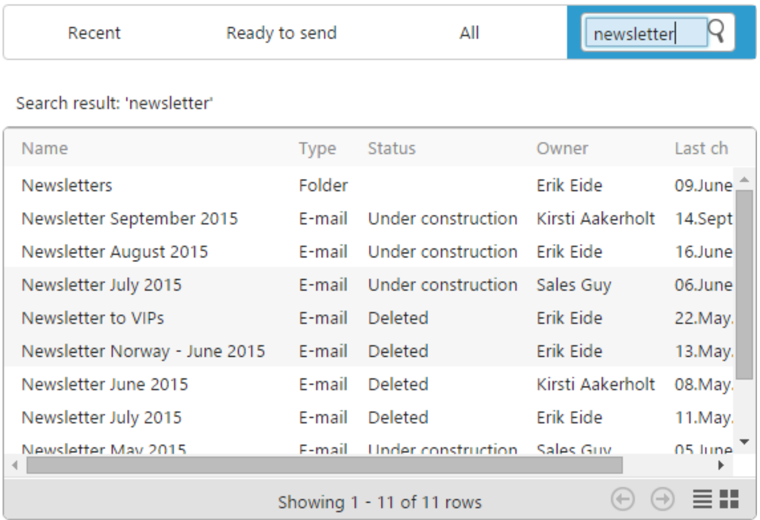




Once you have chosen whether you want to create a mailing for e-mail, document or SMS, you get to a step-by-step workflow that will guide you through all the different aspects of the mailing from start to finish. SMS is only available for Onsite installations where an SMS module is installed.

It is likely that you will spend most time at the third step in the workflow, **Content**, but each step in the workflow are equally important to make a good mailing and are there to support your process.

Search field in the archives

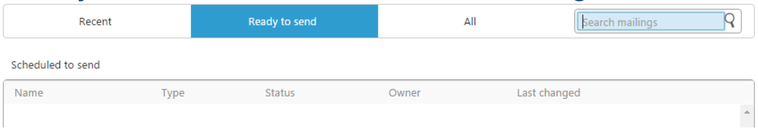


We have added a **Search** field in the top right tab.

This lets you search in all archives to make it easier to find the exact item you are after.

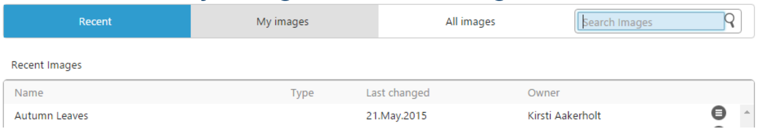
Perhaps you want to look at a previous mailing to re-send to a different audience, re-use a template or find a specific image to use in your current mailing. Use **Search** to find directly whatever you are looking for.

Ready to send and Recent tab on Mailings



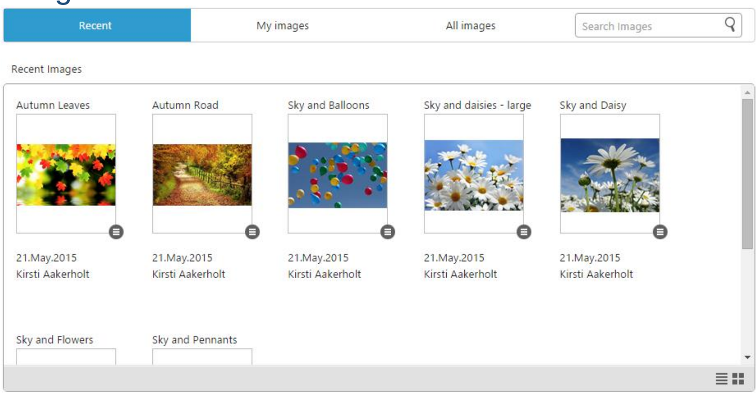
The **Ready to send** archive offer a quick method to find back to the mailings you recently have edited and the mailings that are ready to be sent.

Recent and My images tab for Images



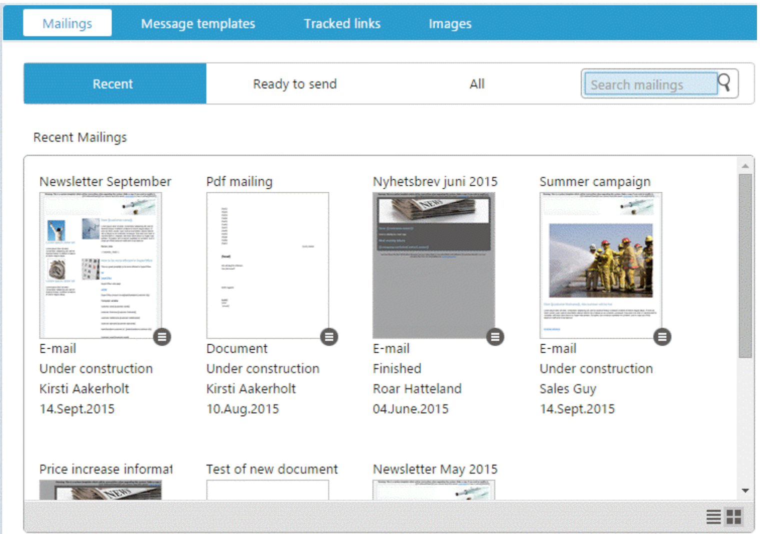
In the **Images** view you can now navigate to **Recent** and **My images** archive. These archives let you find the images you recently worked on and all the images added by you.

Images overview with date and owner information



In the **Image** archive you see more detailed information about the uploaded image, the date and the owner of the image.

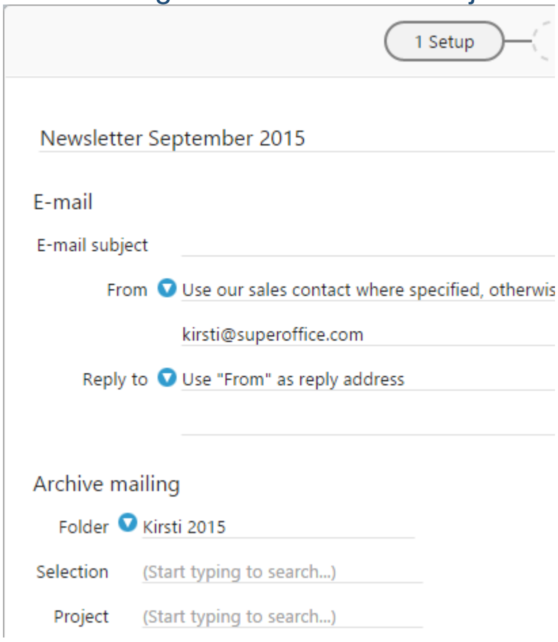
Archive with thumbnail or list view



The archives have two different views: **List** and **Thumbnails**. The **Thumbnails** view give you a quick look of the different mailings, templates and images.

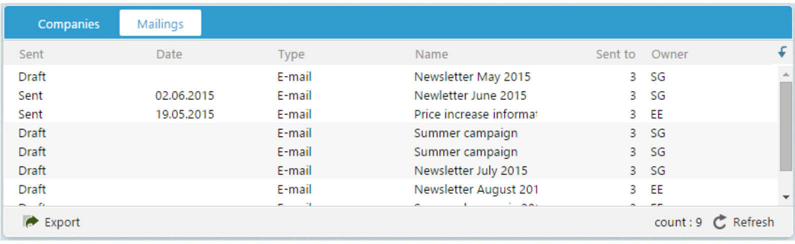
The **List** view makes it easy for you to scan down on specific columns in the archive.

Link mailing to Selection and Project



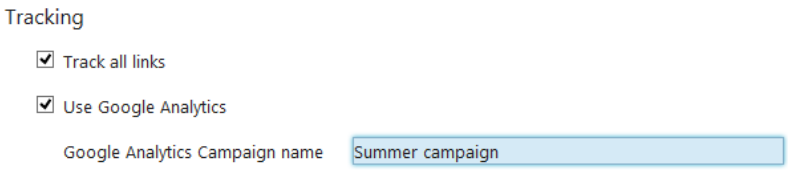
To give you a better overview and access to all the mailings, there is now a link to **Project** and **Selection**.

Associating your mailing with a **Project** or **Selection** lets you always have control over the total communications connected to that project or sale.



Going to the selected project or selection in the CRM client will show the linked mailing in the mailing archive.

Use Google Analytics

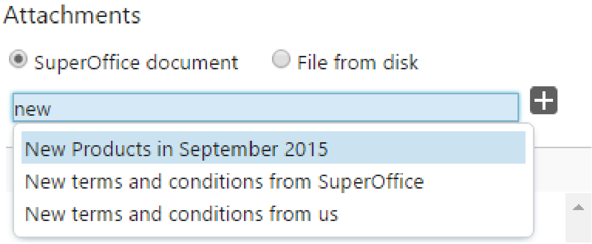


Many marketing professionals use Google Analytics to track what sources drive traffic to their website among other things.

With the **Use Google Analytics** feature, it is now easy for you to trace traffic from your mailings and connect it to Google Analytics (provided that is set up for your web site).

Simply supply a tag-name to the specific mailing you have or to one main tag like “Newsletter”. The tag-name chosen will be added in tracked url's according to Googles Analytics specifications.

Add attachment like documents in CRM

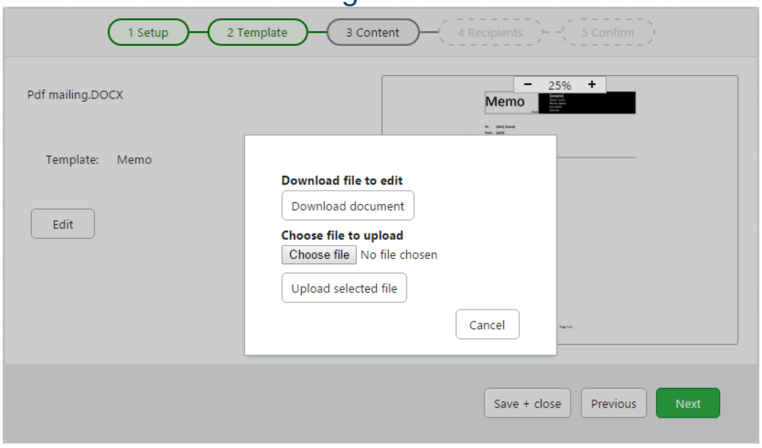


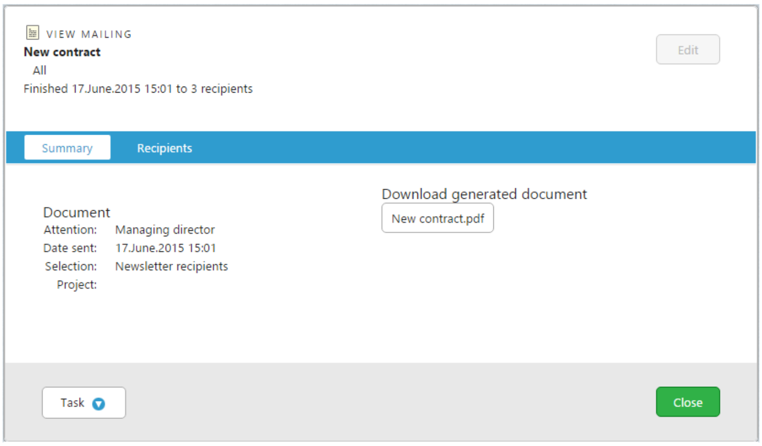
In the workflow page for **Setup** you are able to add an attachment to your mailing.

This can either be a document stored in the CRM client, referred to a **SuperOffice document**, or you can easily add a document from a **File from disk**.

Start searching in the **Search**, select the wanted document in the result list and click on the **+**-button to add the selected document as an attachment.

Create document mailing



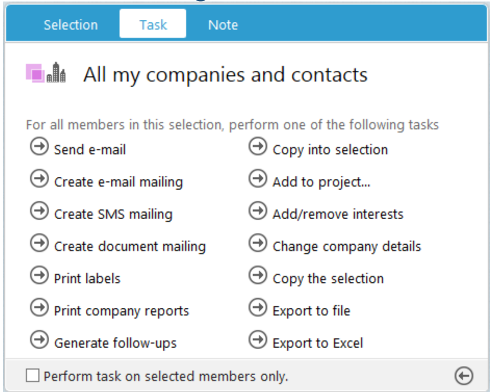


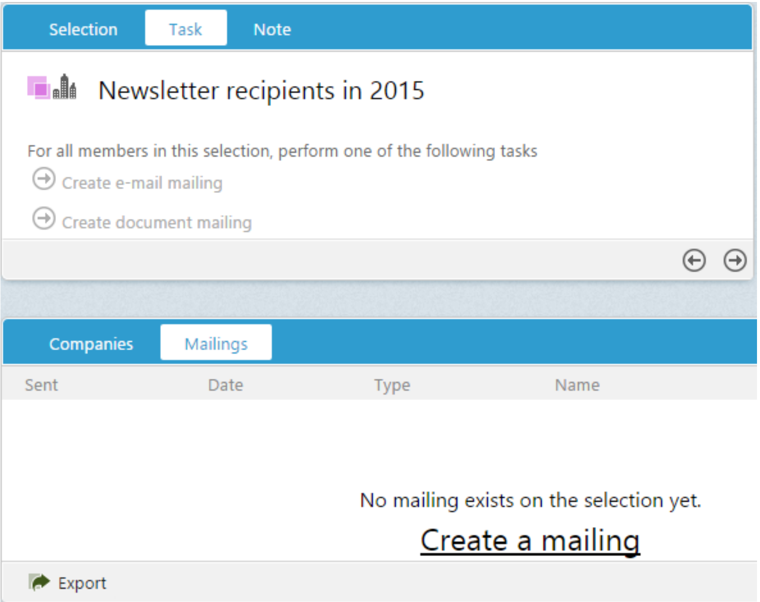
The document mailing feature uses a new and different method to merge than what you have been used to in previous versions of SuperOffice.

The end-result is now presented in a pdf that contains all the pages to all the persons/companies you have selected as recipients in the mailing. The pdf is generated on the server and you will be able to download the pdf from the **View mailing** screen.

Note that in the actual printing of this pdf, you are in greater control of the print process and how many pages you have printed than you previously have been. Also, if there are any errors while printing, you will be given a warning to notify you exactly where in the print sequence that the error happened. This lets you start printing from that exact page instead printing the whole document merge all over again.

Create mailing from Selection in CRM



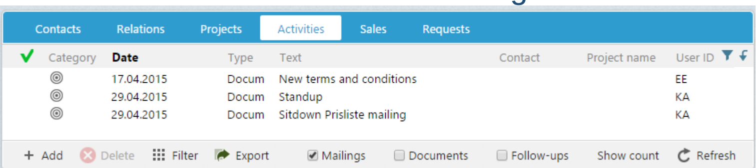


When you are working in the CRM client, you can create new mailings directly from the **Task** tab in **Selection.** There you will find tasks to create an e-mail mailing, a document mailing and a SMS mailing.

There is a new tab for **Mailings** in **Selection** to easily view the mailings that are linked to the specified selection.

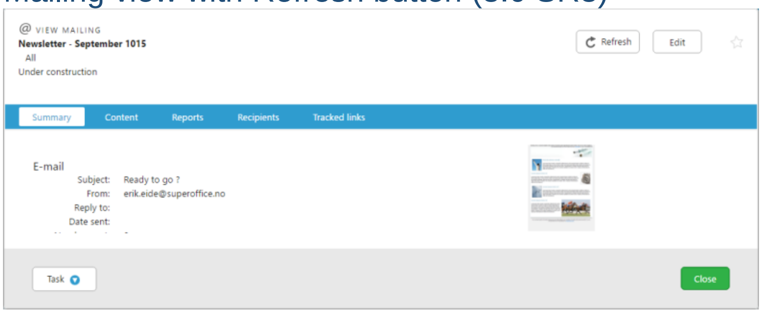
Similarly, in project you will mind the mailings in the activities tab and you can filter for just the mailings (see below).

Activities archive with filter on Mailings



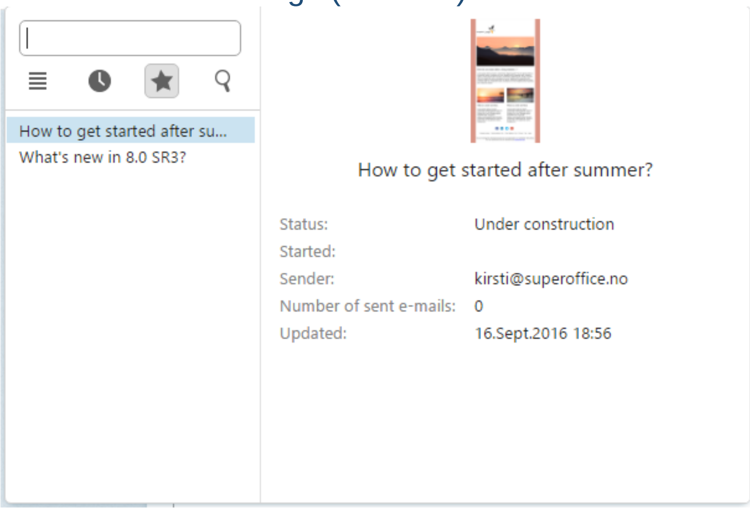
In the **Activities** archive/section tabs there is a new filter button for **Mailings** in the footer. Using this filter will give you a quick overview of the mailings connected to the person, company or the project you are looking at.

Mailing view with Refresh button (8.0 SR3)



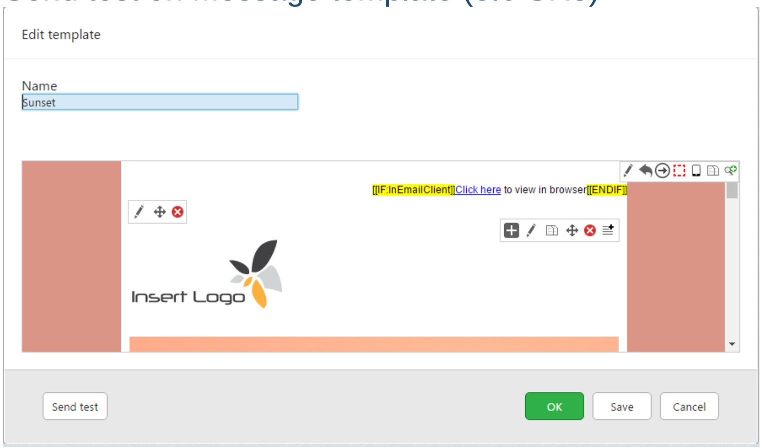
A **Refresh** button has been added to the view of a mailing. It is quick to see changes of recipient list and reports an opened Mailing by clicking the Refresh button.

Favourites on Mailings (8.0 SR3)



With **favourites on mailings** it is easy to find the mailings you are working on or the ones that you often use as a template.

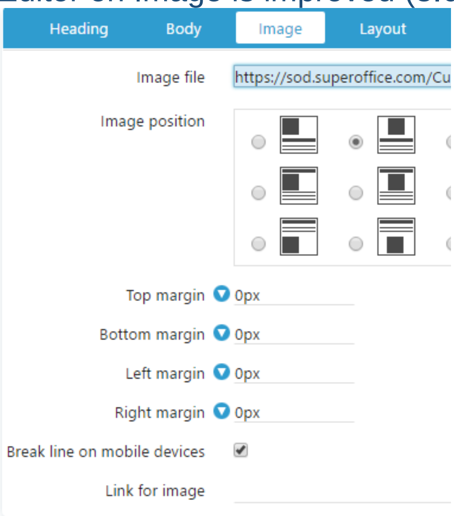
Send test on Message template (8.0 SR3)



When you go to edit **Message template** you have a **Send test** button where you add e-mail address to see how the mailing would look like in an e-mail client. This option is the same as in the edit mailing dialog. So it's easy to send a test to a mail client and see how it will look like.

Remember you can add multiple e-mail addresses by using "; " as separator. Example: test@company.com; mail@company.com; x@x.com.

Editor on Image is improved (8.0 SR3)



An image can now be added in the editor with settings for the top margin, bottom margin, left margin and right margin. You can also set if you want the image to break on mobile devices, so the image will show in full width of the screen.

Settings and maintenance and Windows Client settings

Settings and maintenance

All installations of SuperOffice 8 will demand a web installation.
The Settings and maintenance (.web installation) is now the main administration client for the CRM client. All user administration needs to be done in here (also for Services and Pocket CRM).

The Settings and maintenance will contain:

- Licences
- Users
- Roles
- SAINT
- Lists
- Quote/Sync
- Workflow
- Preferences
- Options
- Import
- Fields

Windows Client settings

The Windows administration client will not normally be used for others than customers that are using for example Travel, Scripting and settings for SoLoader.exe file. The application will only show windows specific settings like Import, Replication, Scripting and SoLoader.

Import of Company, Contact and Product is possible from Settings and Maintenance. However, the import of the following items: Currency, RedLetterDays, Follow-ups, Sales, Projects and ZipCodes; are only available in the Windows Administration.

What's left in the Windows administration is:

- Status
- Options – SoLoader
- Import
- Replication
- Scripting

Preferences – Changes

New preferences

prefsection	prefkey	name
PocketTasks	DisableAutoLogin	SP:"Desactivar inicio de sesión automático";US:"Disable autologin";GE:"Automatisches Anmelden ausschalten."
PocketTasks	AutoLogoutTime	SP:"Tiempo de desconexión automática";US:"Autologout time";GE:"Automatische Abmeldungszeit"
NetServices	WhatsNewUrl	SP:"API de Novedades";US:"What's new API";GE:"Was ist neu API"

NetServices	CommunityUrl	SP:"Página principal de la Comunidad";US:"Community home page";GE:"Community Homepage"
NetServices	FeedbackUrl	SP:"Formulario de feedback";US:"Feedback form";GE:"Feedback-Formular"
NetServices	TechSupportUrl	SP:"Sitio de Soporte técnico";US:"Tech Support site";GE:"Seite des technischen Supports"
NetServices	ResourceCtrUrl	SP:"Sitio del Centro de recursos";US:"Resource Center site";GE:"Seite des Ressourcen-Centers"
NetServices	HelpUrl	SP:"Ayuda sensible al contexto";US:"Context sensitive help";GE:"Kontextspezifische Hilfe"
NetServices	HelpIndexUrl	SP:"Índice de versión para ayuda";US:"Version index for help";GE:"Versionsindex für Hilfe"
NetServices	WhatsNewSeenWin	SP:"Novedades vistas en Win";US:"What's new seen in Win";GE:"Was ist neu gesehen in Win"
NetServices	WhatsNewSeenWeb	SP:"Novedades vistas en Web";US:"What's new seen in Web";GE:"Was ist neu gesehen in Web"
NetServices	WhatsNewSeenPocket	SP:"Novedades vistas en Pocket";US:"What's new seen in Pocket";GE:"Was ist neu gesehen in Pocket"
NetServices	WhatsNewConfirmedWin	SP:"Novedades confirmadas en Win";US:"What's new confirmed in Win";GE:"Was ist neu bestätigt in Win"
NetServices	WhatsNewConfirmedWeb	SP:"Novedades confirmadas en Web";US:"What's new confirmed in Web";GE:"Was ist neu bestätigt in Web"
NetServices	WhatsNewConfirmedPocket	SP:"Novedades confirmadas en Pocket";US:"What's new confirmed in Pocket";GE:"Was ist neu bestätigt in Pocket"
Functions	EnableLocalRendererInArchive	SP:"Cargar pestañas de sección completas";US:"Load entire section tabs";GE:"Laden von gesamten Abschnitts-Tabs"
Functions	AutoLoadLimitInArchive	SP:"Límite para autocarga";US:"Limit for auto-loading";GE:"Limit für Auto-Loading"
Defaults	PhoneLinkFormat	SP:"Formato de enlace telefónico";US:"Phone-Link format";GE:"Telefon-Link Format"
System	CRMBaseURL	US:"Base URL for Web client";GE:"Base URL for Web client"

Deleted preferences

prefsection	prefkey	name
NetServices	EnableNetServicesOnCentral	US:"Enable Web Services";GE:"Web Services aktivieren"
NetServices	EnableNetServicesOnTravel	US:"Enable Web Services on Travel";GE:"Web Services für Travel bereitstellen"
NetServices	UserPassportId	US:"User's Passport ID";GE:"Benutzer-Passport ID"
NetServices	LastPage	US:"Last page read";GE:"Letzte gelesene Seite"
NetServices	TeaserURL	US:"Teaser URL";GE:"Teaser-URL"
NetServices	ShowOnStartup	US:"Show news on startup";GE:"Nachrichten bei Start anzeigen"
NetServices	NewsURL	US:"News URL";GE:"Nachrichten-URL"
NetServices	SeenTeaserDlg	US:"Teaser read";GE:"Teaser gelesen"
NetServices	StatusCheckTimeout	US:"Timeout";GE:"Timeout"

Technical info and requirements

DocPlugin in .win is now using the same plugin from NetServer and common api's. This means that if you are adding functional stuff to a plugin, only one plugin is needed. Further, there is no need to register the dll on the computer (SoDocPlugin.dll).

New versions of the Service API for NetServer is shipped. The three versions of Service API are: 7.5, 8.0 and 8.1.

Performance

Selections in CRM .web client – The fetching of data is optimized on **Selection**. The client will get the data locally and doing so, the performance on sorting, filtering and scrolling are hugely improved. Web services are in general improved in this version.

Security

Continuous development to mitigate the OWASP top 10 security risks.