SuperOffice AS

What’s new in SuperOffice 8.1

SuperOffice AS – Research and Development

Updated: 30 October 2017

More options, made simple

We can introduce two new features in SuperOffice – The chat functionality and the Bulk update (in Windows only) and an improved Inbox.

The **Chat** feature is a tool which you can use to converse with prospects, customers, and suppliers directly on your website, all in real-time, a live chat feature. This means that there is a need to be a real person on the other end of the chat to talk to customers, versus a chatbot, which is a computer program that mimics conversation with people via artificial intelligence.

Customers don't have to install anything on their device in order to chat with you. And because SuperOffice Chat is 100% integrated with SuperOffice, not only can you "chat" and answer questions, but you also have access to the relevant customer information in SuperOffice CRM to help your customers quickly and efficiently.

The **Bulk update** is a feature only available in Windows (for now), it's an improvement of the *Change company details* from Tasks on Selections. With bulk update, you can change almost all fields on all entities including your user defined fields. This is a huge improvement and makes it very powerful, also to maintain and clean up your data.

The **Inbox** has finally gotten some love and tender care. That has resulted in a new, more user-friendly inbox where we support different mail servers. The inbox is a lot faster and that will off course make it easier to work with e-mails, archiving outgoing and incoming e-mails.

The key features for the inbox are; limitless number of e-mails; folders and various sort options like date received, from, to, subject, size, importance, flagged; filter what e-mails to display; either use the preview window or open the e-mail in a dialog; set actions like read, unread or move an e-mail to a different folder on one or multiple e-mails; access to all the e-mail address in the CRM database.

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Summary of Highlights

SuperOffice 8.1 - is the current major upgrade of the SuperOffice CRM platform.

Major news in this version:

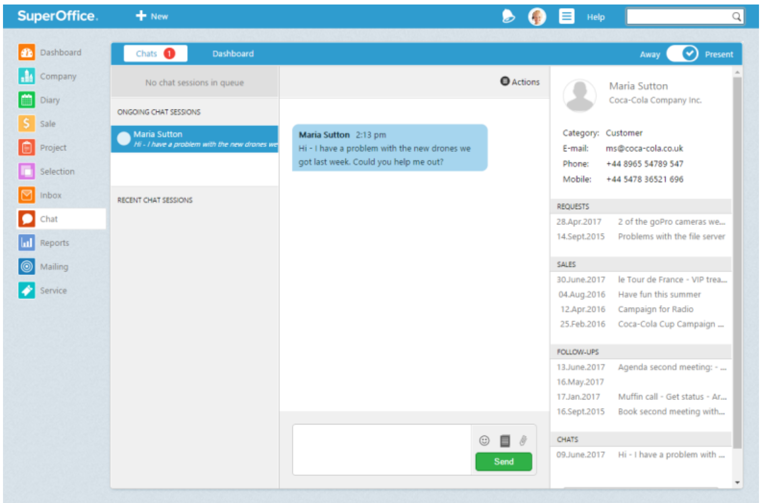
- Chat
- Inbox
- CRMScript for both Service and CRM

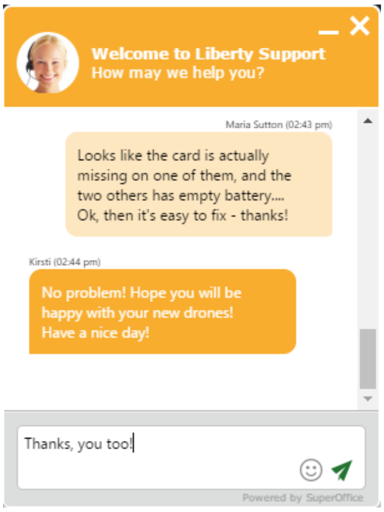
Additional features in Windows:

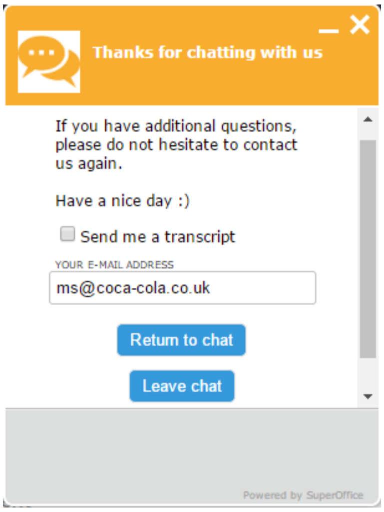
- Bulk update

Additional features and functions in the Windows, Mailing and Service, see list.

Chat







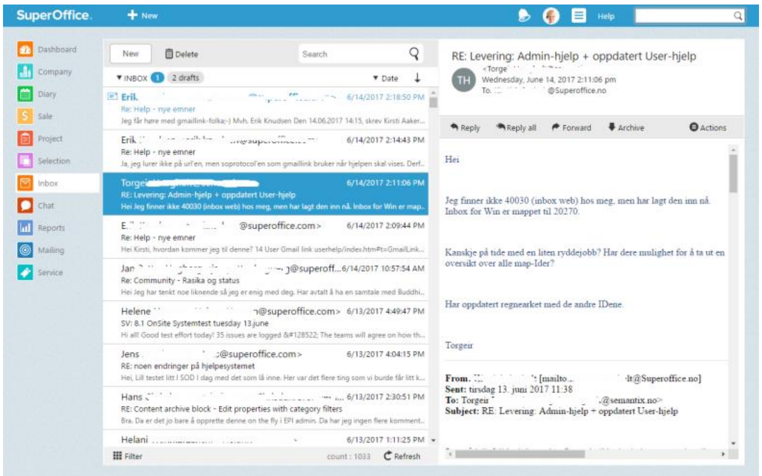
The new **Chat** function will give you the possibility to help the people visiting your website directly and on the fly.

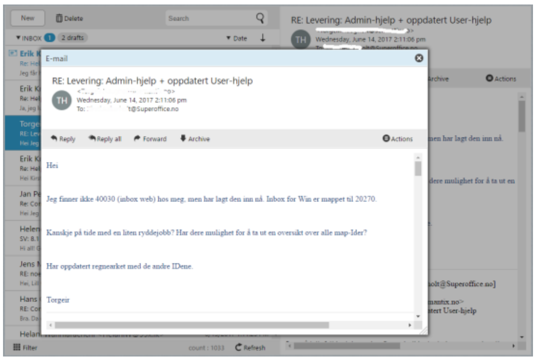
The Chat navigator appears in your client if you have the right license and are added as an agent to a chat channel. The maintenance of the chat channels are made in Settings and Maintenance or in Service System settings Chat section.

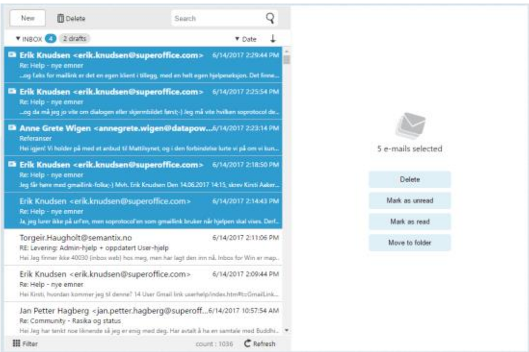
You'll see two tabs: Chats and Dashboard. Chats is where you chat with the different external persons and the Dashboard shows an overview of waiting and current chats sessions.

Check out more on our [Community](community.superoffice.com).

Inbox







The Inbox has gone through a brush up and is more intuitive and better at handling different mail servers and systems. This will work more like an ordinary mail client with an intuitive flow and buttons. You also can use the inbox to run actions on multiselected e-mails.

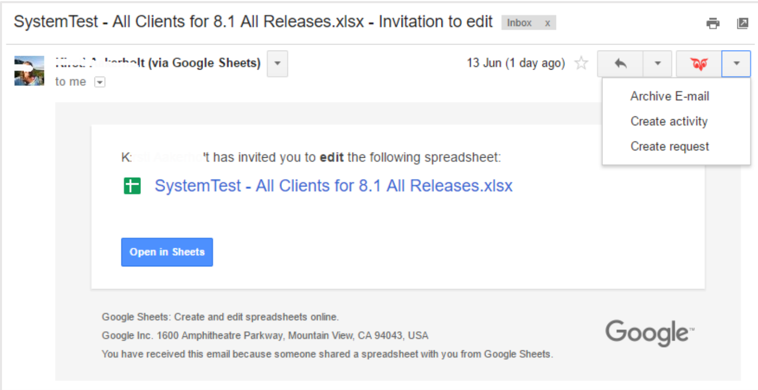
You can decide to use the preview section to the right or to open the e-mail in a dialog, where the dialog is possible to resize and move around. Preview and dialog have the same options for reply, reply all, forward, archive and actions.

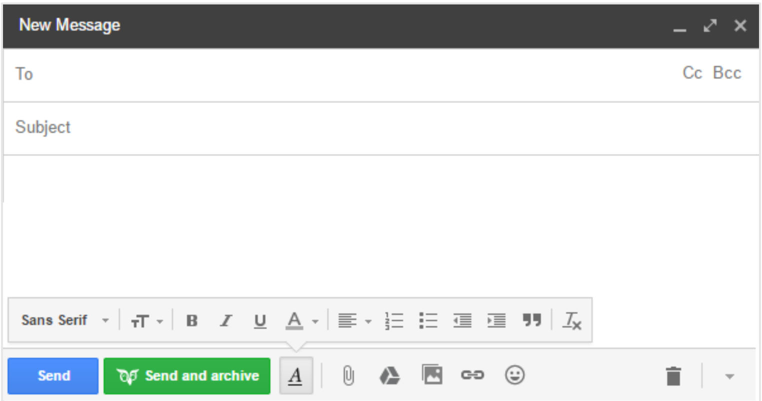
The archive options are Archive e-mail, Create task and Create request. When an attachment is added you can also archive the attachment separately in CRM.

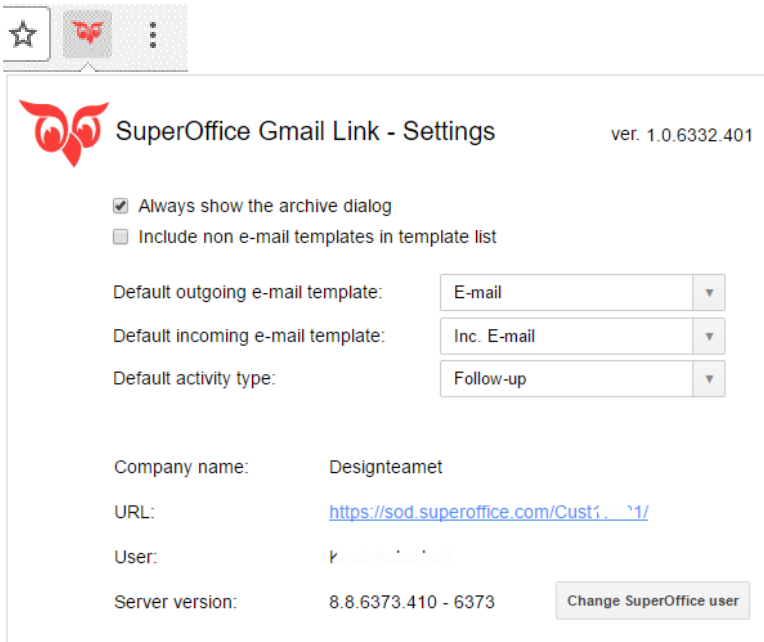
By multiselect e-mails you have different options like delete, mark as unread, mark as read and move to folder.

You have different sort by possibilities and a filter of what you show in the archive. You can off course also select different folders to show in the archive.

Gmail link







The Gmail Link app from SuperOffice allows users to easily store their emails directly into their central CRM database so that all customer information and conversations are kept in one place.

Users can store incoming and outgoing emails, store attachments as documents, turn an email into a follow-up in their calendar or create a support ticket in SuperOffice Service. These features help the user manage their inbox as well as improve their daily work flow.

In addition, new email addresses can easily be added from Gmail into the SuperOffice customer database, which makes it easy to build CRM data and improve its quality.

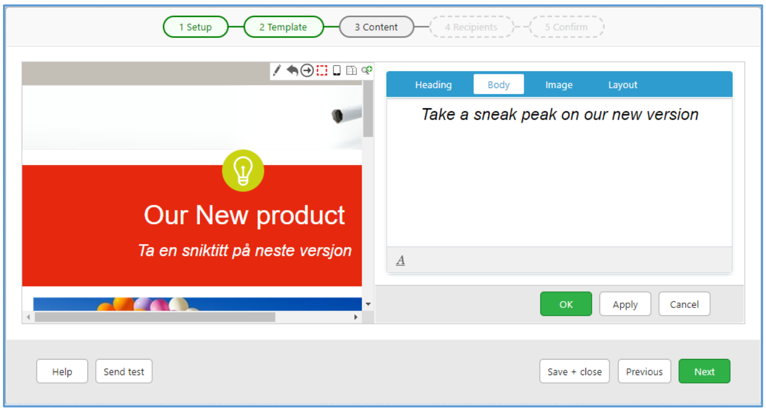
It's easy to archive an incoming e-mail, just click the **Send and archive** button when you want to archive an outgoing e-mail.

In the top bar of Chrome, par example, you will see a SuperOffice icon and clicking it will open the settings dialog where you set default preferences. You can also Change SuperOffice user to another user or installation.

Check out more on our [Community](https://community.superoffice.com).

New and improved Mailing

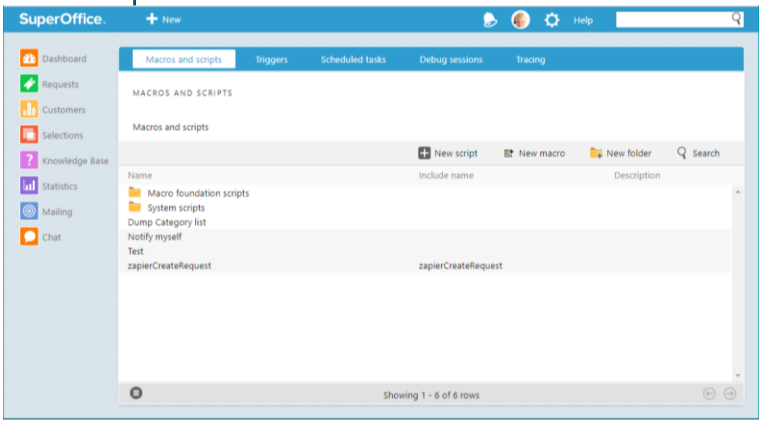
Editor with side bar



In the **mailing** editor you will get a **side bar** when selecting a field, text or image to **edit**. This will help you to easy see the changes and not to lose any dialogs behind the browser windows when you click to check the changes.

New and Improved Service

CRMScript



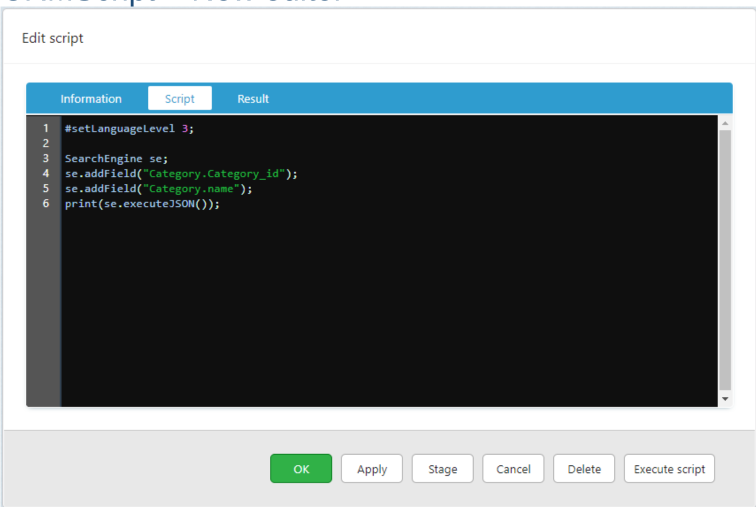
The old ejScript has gotten a fresh new look, a lot of new functionality and been renamed to **CRMScript**.

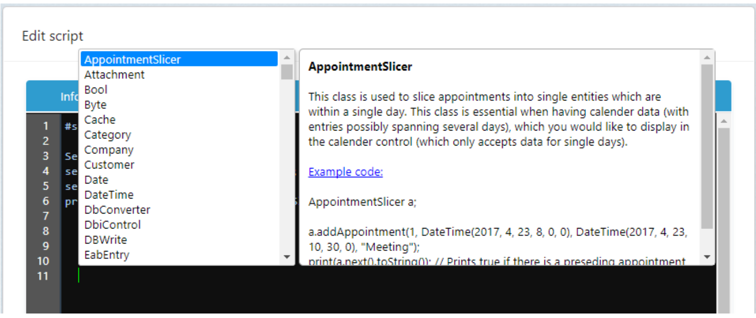
The main screen shows the tabs for:

- Macros and scripts
- Triggers
- Scheduled tasks
- Debug sessions
- Tracing

The CRMScript is also available for the Web application of CRM, not only for Service. As for the Windows application, it has still its own scripting system that only works for Windows.

CRMScript – New editor



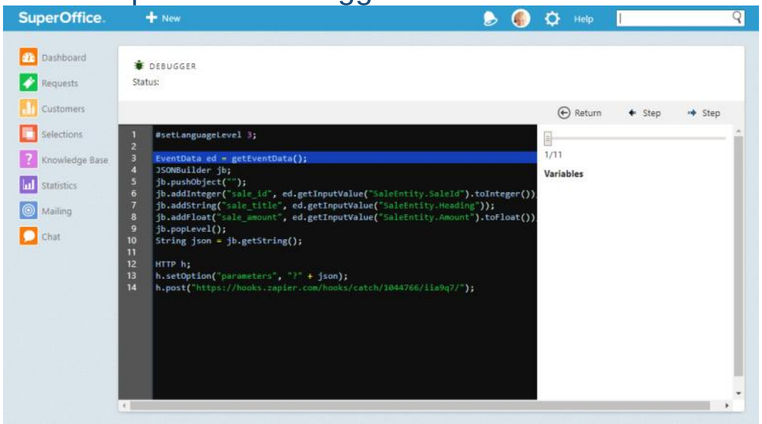


Ctrl+Space will open a help dialog for different classes.

We are now using an editor which supports indentation, colour syntaxing, folding, searching and more. The documentation for all **CRMScript** classes and methods have been integrated with intellisense-like functionality. Saving is done using ajax, which means the page does not reload. This makes it easier to see errors, the position in editor is kept and the undo buffer is intact.

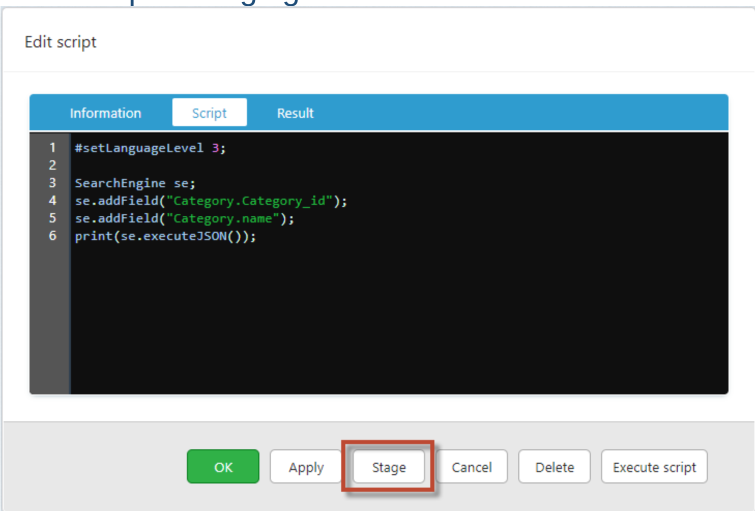
In the language, we have introduced structs which can contain variables and methods. Structs and arrays can easily be streamed to and from JSON structures. We also have a new **JSONBuilder** class which simplifies creating **JSON** structures.

CRMScript – New debugger



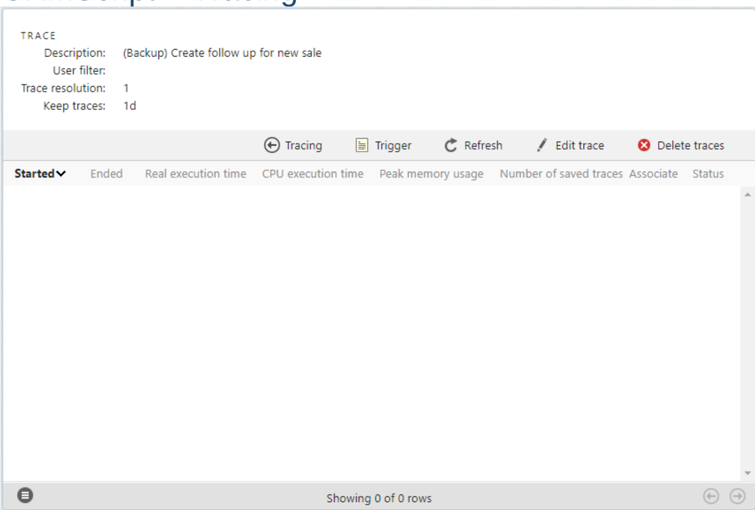
It's now much easier to debug scripts with real time tracing, breakpoints and stepping. You can easily debug scripts executing in a live environment, without interfering with other users of the system.

CRMScript – Staging



While working with scripts, it is now possible to "stage" it by saving it temporarily for your user only. This allows for testing changes before exposing them to other users.

CRMScript – Tracing

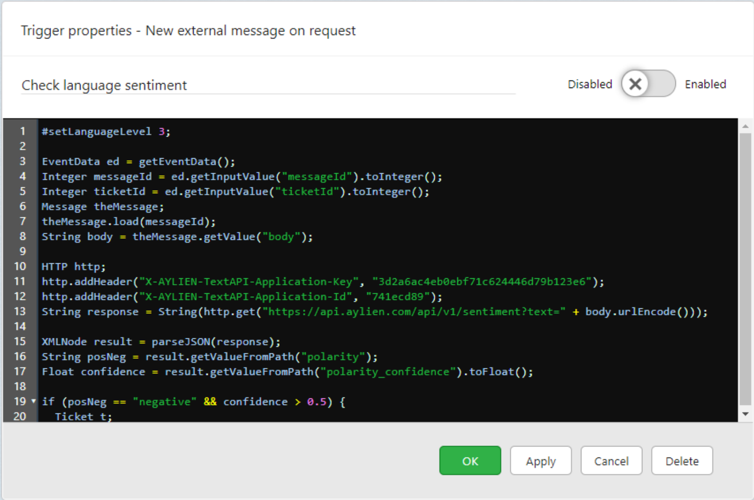


Instead of using the debug tool, you can use tracing.

The tracing feature will record every detail in the execution of the script and save it in a log. Every time the script is used, the execution is recorded. You can compare this recording with videotaping a movie or an old VHS cassette tape.

Afterwards, you can rewind and fast forward through the recording. You get a full list of all the recorded executions, and by who the script was executed. Which allows you to see how your scripts behaved and see all the variables at any given point.

CRMScript – Triggers



You can automate your CRM solution by using a feature we call the Event handler. It consists of a set of predefined triggers and actions which you can choose from and combined the way you want.

First you choose what event has to occur for the script to run, and then you decide what action you want the script to execute, like creating a request or sending an email or SMS with information.

Unified login

All SuperOffice products must be installed on the same domain, under different directories. Like for example https://socrm.myorganization.com/sales and https://socrm.myorganization.com/service

From SuperOffice 8.1 all authentication for Sales web client and Service clients is done by the Sales web client. After successfully authenticating a session key is stored in browser cookie which also registered the users ejuser.id. We call this Unified login, where you will be logged in to both clients or logged out of both clients.

Check out the technical documentation on how to do this on our Community.

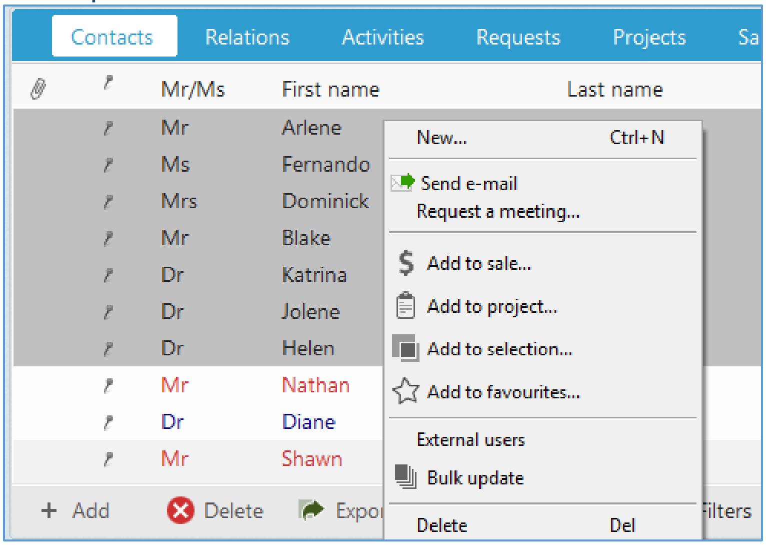
New and improved Windows client

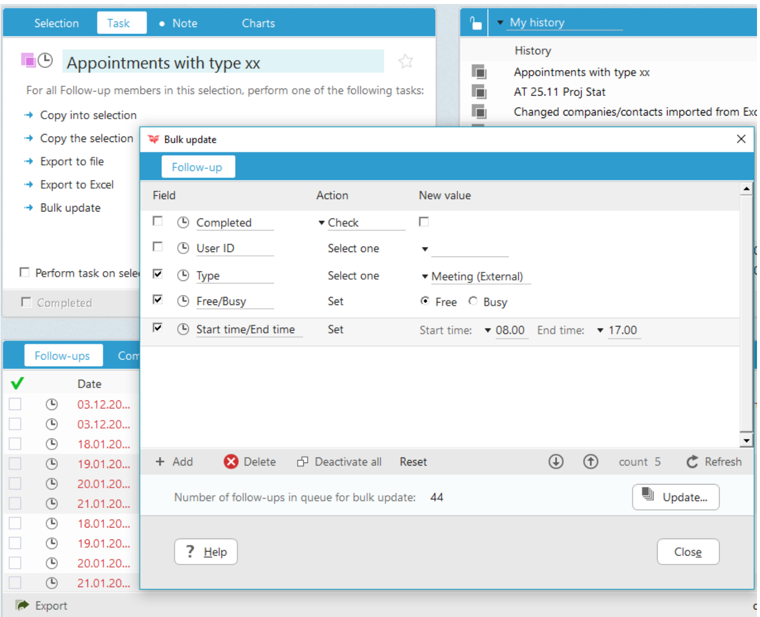
Windows and Web application – Overview of the differences

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

- For this version, the Windows has gotten done a lot of improvement, while the Web team has made the new Inbox and Chat functionality. See the sections with (Windows) in the heading.

Bulk update





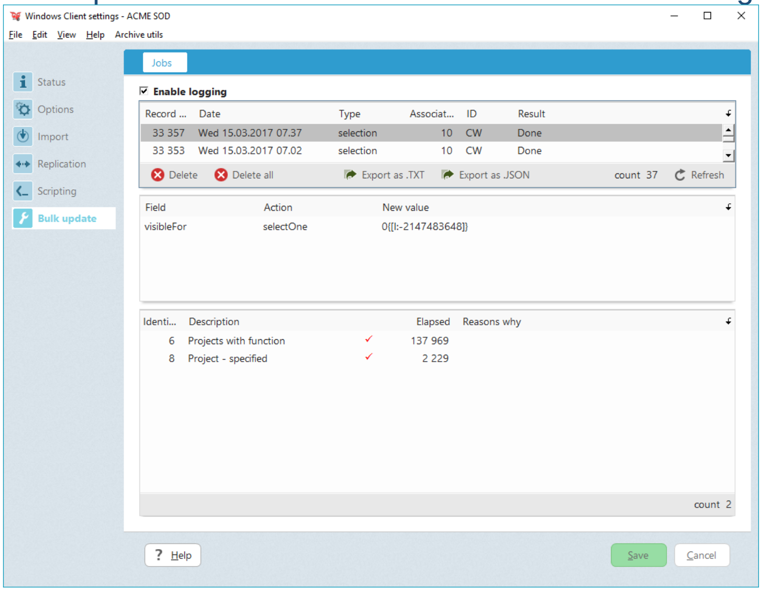
You sometimes need the possibility to change multiples items of the same entity type. This is easily done by selecting multiple rows, right click to open the context menu and select **Bulk update**.

The **Bulk update** is visible as **Task** on **Selection**.

In the Bulk update dialog, you select the different fields you like to change. You can select almost all fields, inclusive your user defined fields.

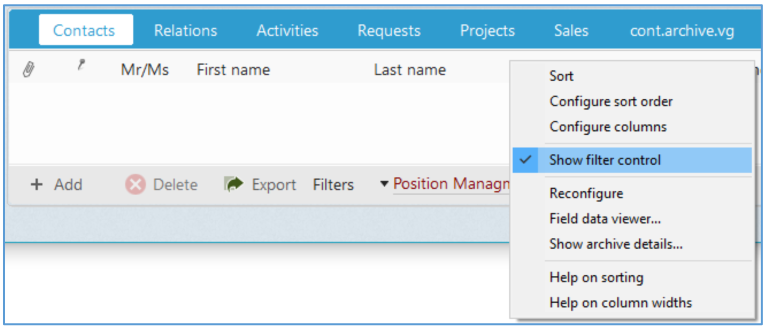
For example, you want to clean up the different appointment types, group some of them and delete the types you no longer need. You create a follow-up selection with the appointment type you want to remove. Select the task **Bulk update** and find the field for appointment type and select the type you want to replace it with. You can off course select more than one field in one go. When you are sure the correct fields with correct values are selected, you click **Update** to start the change. The dialog is modeless, so it's possible for you navigate in other parts of the client.

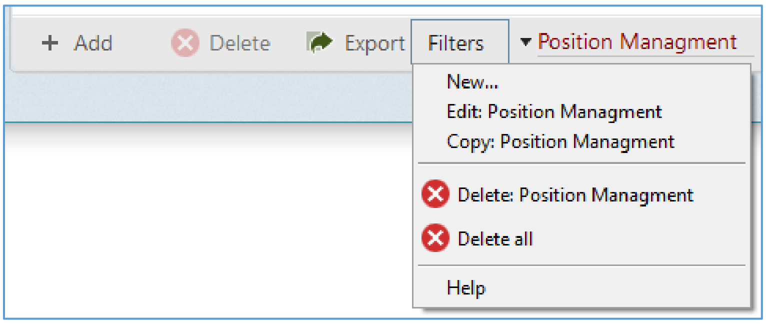
Bulk update – Job overview in Windows client settings



In Windows Client settings you have a **Bulk update navigator** where you can get an overview of all the different bulk updated that has been run on the database. Fields updated and time taken to do the update is what's showing.

Filter in archives

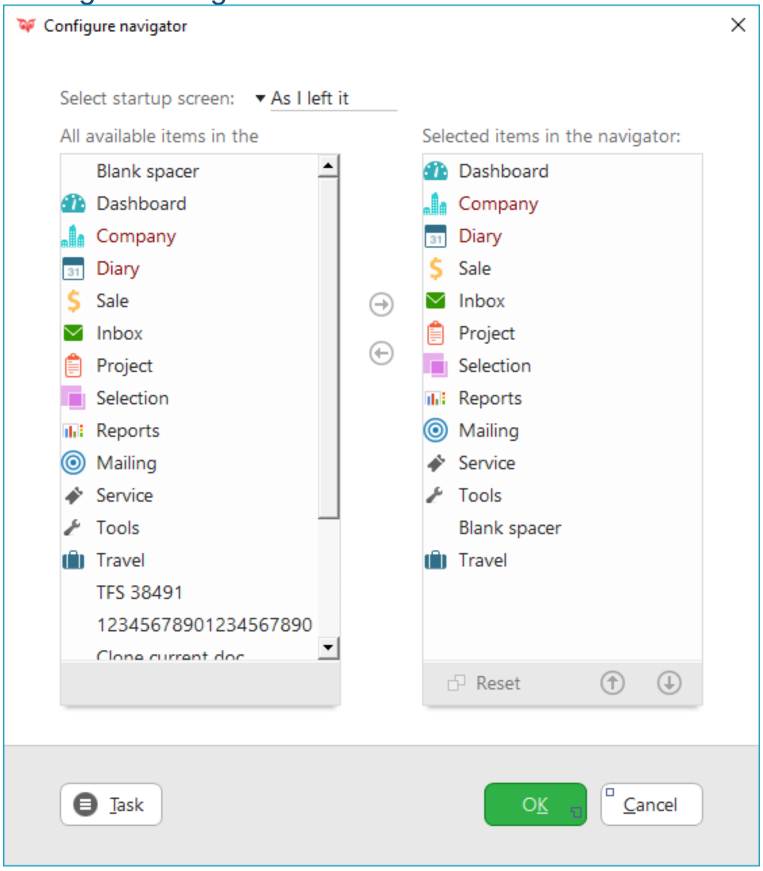




Right click on the archive header you want extra filtering and select **Show filter control**. The filter button and drop down shows in the archive footer. Click the «**Filters**» button and select «New» to create a new filter. Now you can add criteria to the specific archive you are on and use it in the filter drop down.

The filter is different on all the archives, since the archives have different content and different fields. Add filters on the archives you like to filter the content to quicker see and find the items you are looking for.

Configure navigator

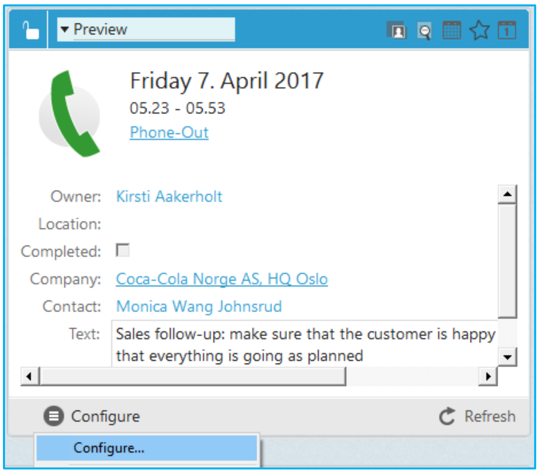


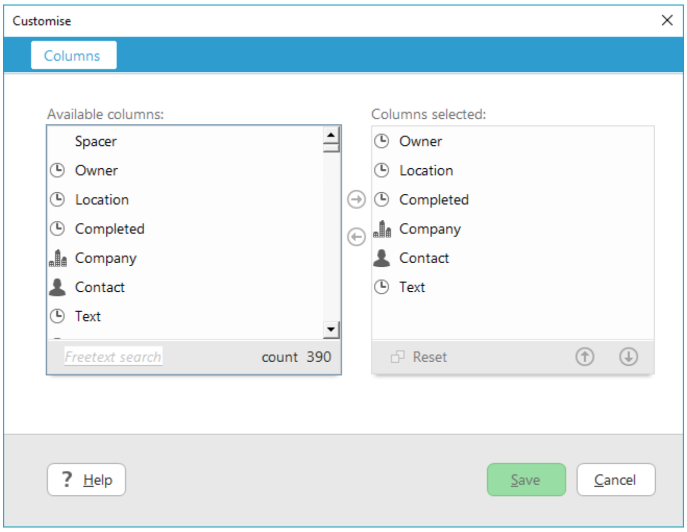
The **Configure dialog** will give you a possibility to set the rank and hide/cripple of the different navigator buttons you have access to.
Remember that removing, like Sale, from the navigator, will also remove sale from all dialogs, archives, find, etc. It will be the same as the Cripple function from the Settings and maintenance, only the user does it themselves.

Cripple preferences

You can cripple in: Preferences in Settings and Maintenance and Configure navigator.
Implemented so you lose your rights for adding ex. sales – using it will actually hide the sale from all parts in SO.
This goes for all the different dialogs, so if you say you don't want to see project, the Project field is hidden from all dialog, tabs, main card and mini panels.

Mini card – Preview and main entities with configure

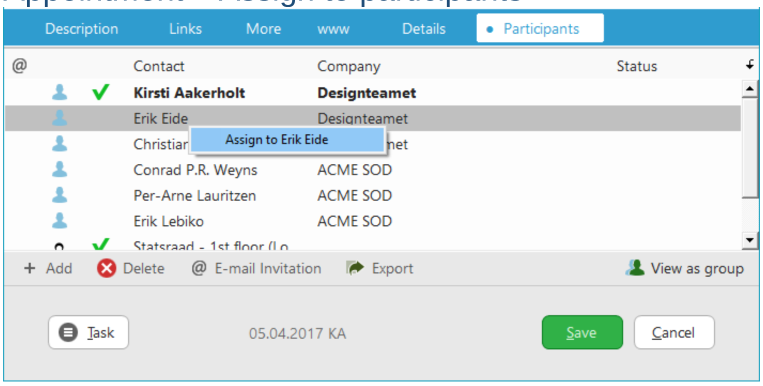


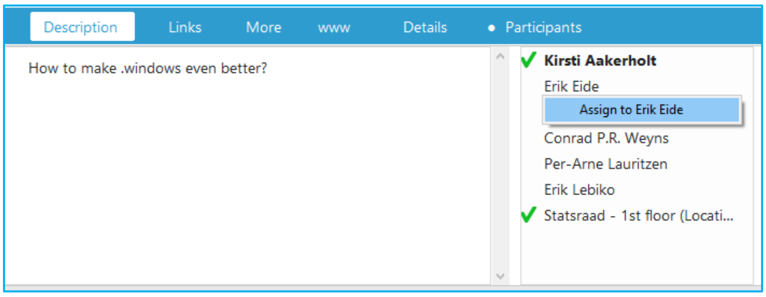


When you select the **Preview** or a main entity you can configure most of the fields showing in the panel. That way you can show UDEFs and remove fields that is not interesting.

This will make the **Preview** more user friendly and customized to your own use of SuperOffice.

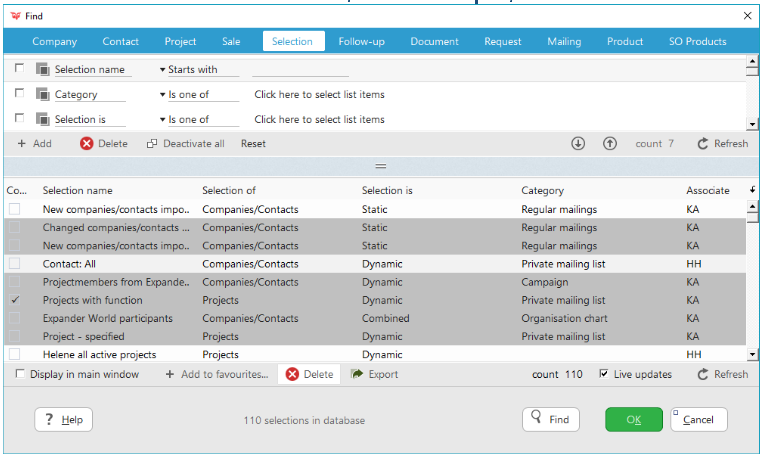
Appointment – Assign to participants





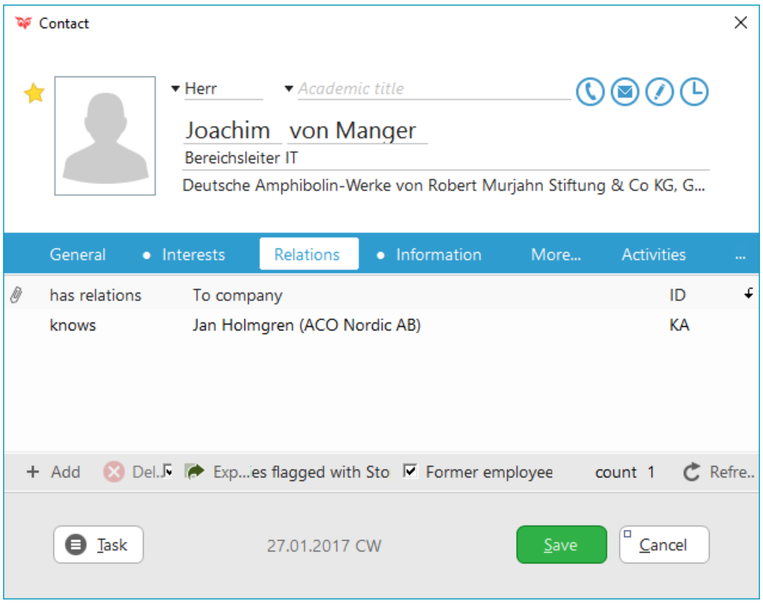
To easily assign your appointment to one of the other participants, you can now right click on a participant and say **Assign to**. You will be removed as the owner and as a participant, and the selected participant is set to the appointment owner.

Find – Delete selections, follow-ups, documents



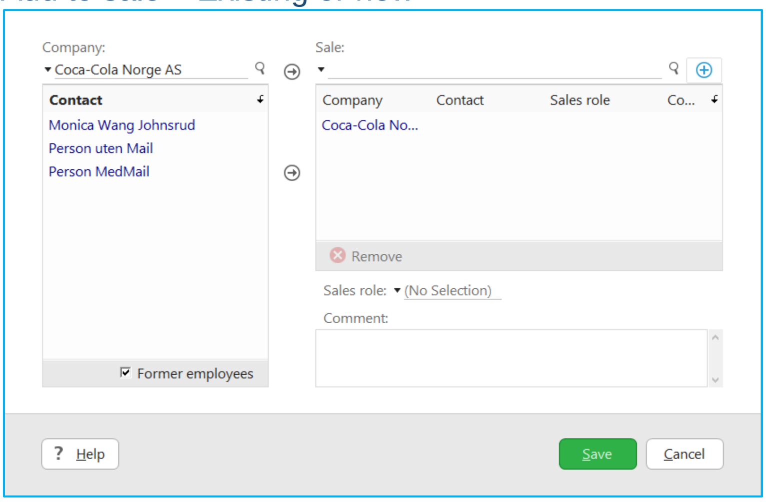
On the result archive, you can right click to get the context menu with Delete option, or use **Delete** button in archive footer. This is the only place where you can select multiple selections and delete them. Regarding deleting the different entities from selection, you have the Delete x entities from the file menu of **Selection**.

Person card – Relations tab



On the **Contact** person card you have a **Relations** tab with the direct relation on the selected person.

Add to sale – Existing or new

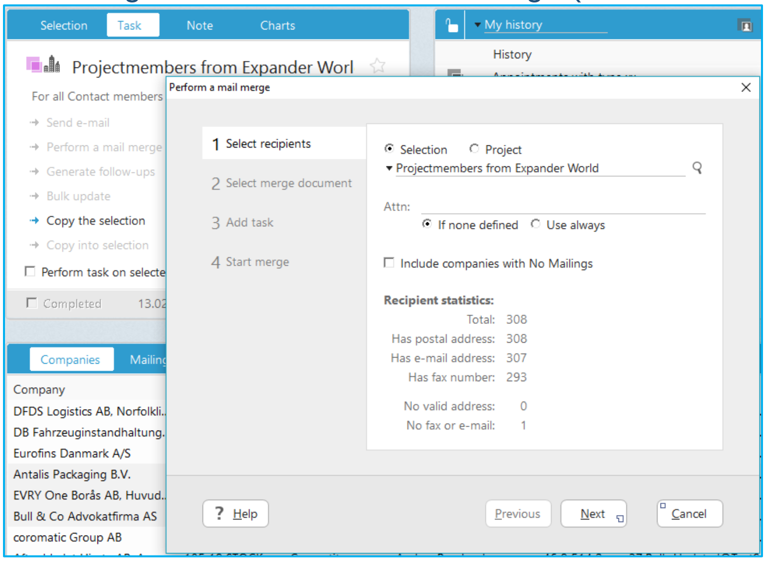


Windows only
From the **Add to sale** dialog you have the possibility to create a new sale on the fly.
The Add to dialog is modeless and clicking + button will open the sale card to create a new sale and the wanted stakeholders can be saved to the new sale.
This way of adding new entities will also be implemented on Add to selection and project.

F5 – shallow refresh

Refresh data, models, interests view and other views without recreating archives or refresh UI.
The **F5** function key can be reached from com and SoProtocoll.
The Shift+F5 is a bad experience for the user, so we try not to use that.

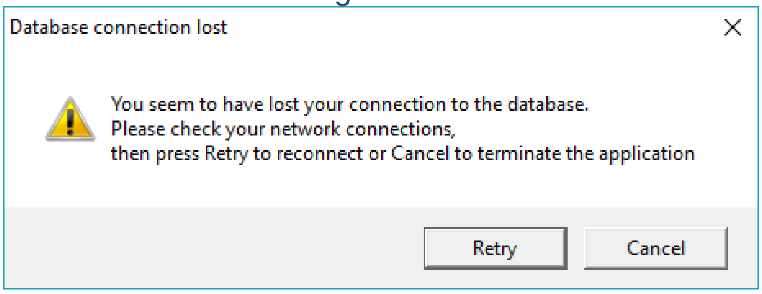
Mail Merge – Old document mail merge (Satellite users)



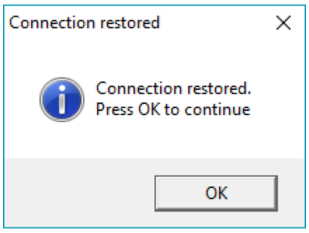
SoUser.ini settings:
[FeatureToggle]
MailMerge=1

For some customers, when they have satellites for part of their users, they still want to use the old mail merge for document. This will give you the task item in Selection to still run the document merge, the old Mail merge task.

Reconnect when loosing connection



When you lose your connection with the database in the Windows client, it is now easy to reconnect to it when you have regained your connection. Just click the Reconnect button or you can off course select close the application.



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