SuperOffice AS

What’s new in SuperOffice 8.2

SuperOffice AS – Research and Development
Updated: 09 March 2018

How to handle GDPR in SuperOffice?

GDPR is something that all companies need to consider and make adjustments to reach the GDPR law. Read more about GDPR on our Community and read more about how to get an overview of your company's personal data in the GDPR checklist.

We can introduce the first part of GDPR with the Consent Management and the complete Bulk update (now also available in our .web client) in SuperOffice.

Consent Management will handle privacy, consent and subscription for each person stored in your SuperOffice installation.

Bulk update will give you the possibility to update information on multiple items in SuperOffice. That is a powerful tool that makes it possible to make mass changes on a selection for persons and change the subscription list and also consent with wanted settings. But before you can do so, you need to have a clear idea about GDPR, Consent and what it should mean to your company.

Contents

Summary of Highlights

SuperOffice 8.2 - is the current major upgrade of the SuperOffice CRM platform.

Major news in this version:

- Consent management
- Bulk update in CRM (both windows and web)

Consent management includes different parts of SuperOffice. Each person in your SuperOffice database will get a consent for Store data and E-marketing. And default settings and behaviour can be altered in “Settings and maintenance”.

In the upgrade to 8.2 some settings are set. As soon as one of these rules applies the E-marketing On/Off is set.

- No mailing = On ➔ E-marketing consent added, legal base = Withdrawn. Slider shows OFF
- At least one mailing sent, in the last three years, regardless of bounce/open/whatever ➔ E-marketing consent added, legal base = Legitimate Interest. Slider shows ON and all subscriptions are checked (ON).
- None of the above ➔ no consent record is added to the database. E-marketing slider shows OFF.

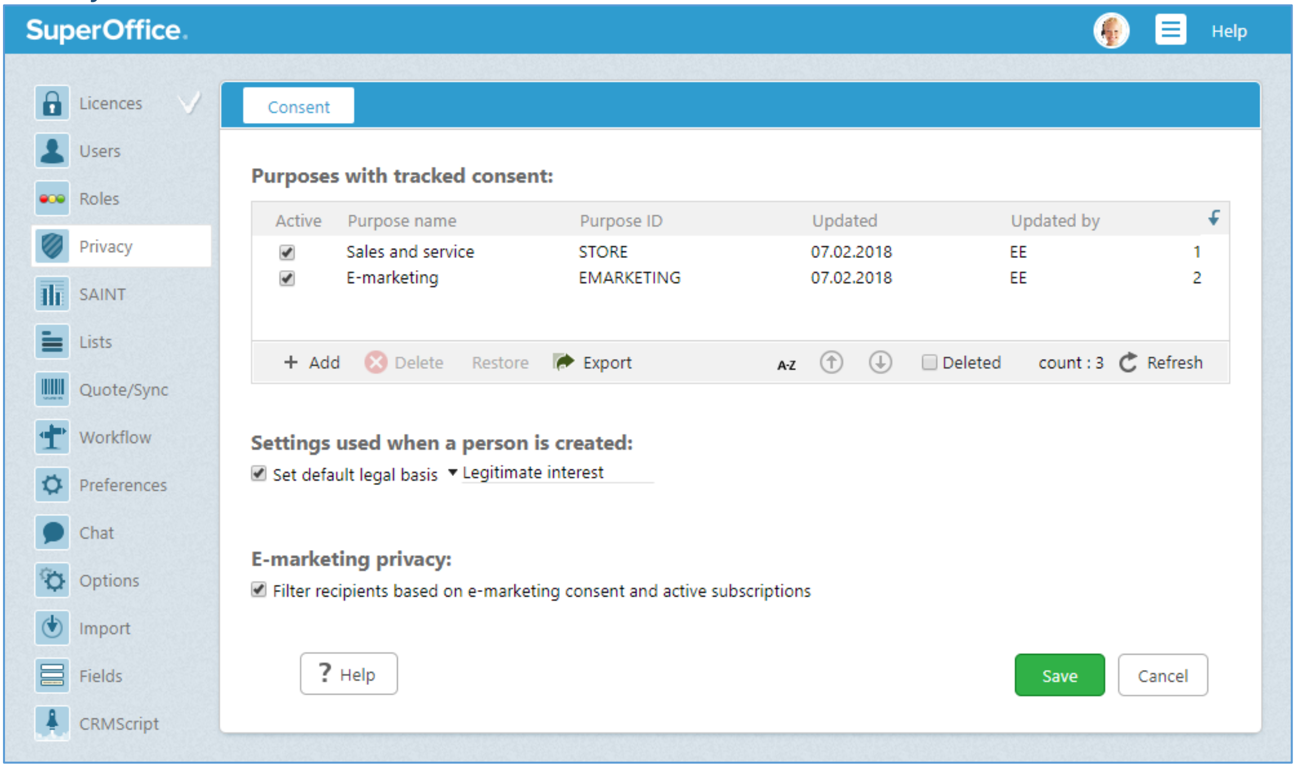
If these rules don’t apply to your system and how you want to use E-marketing consent, you can still use Bulk update to change the settings on existing persons. Just create the correct selections and start the bulk update and change the fields for E-marketing On/Off, legal base and subscriptions to the wanted settings. Just be certain that your rules are good ones and not illegal (in the eyes of GDPR).

There are also additional features and functions in the Windows, Mailing and Service, see list.

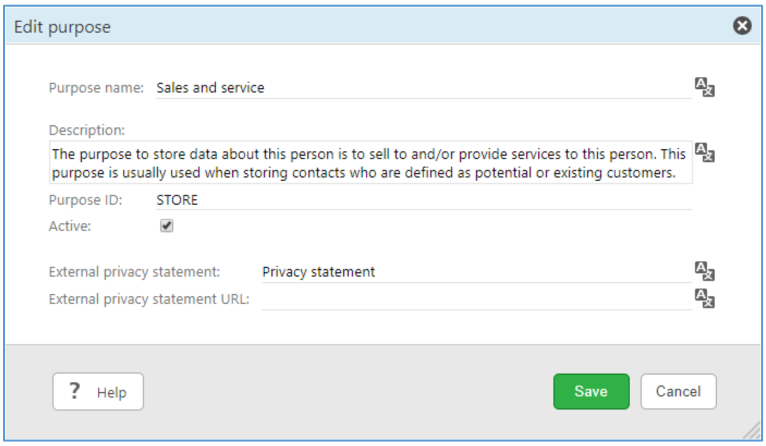
Sub releaser

- **Release 8.2 R03 – 2018.02.12-03** has minor changes, most of them are related to Subscription and Consent management.
- **Release 8.2 R04 – 2018.02.21-01** has minor changes, most of them are related to Subscription and Consent management.

Privacy



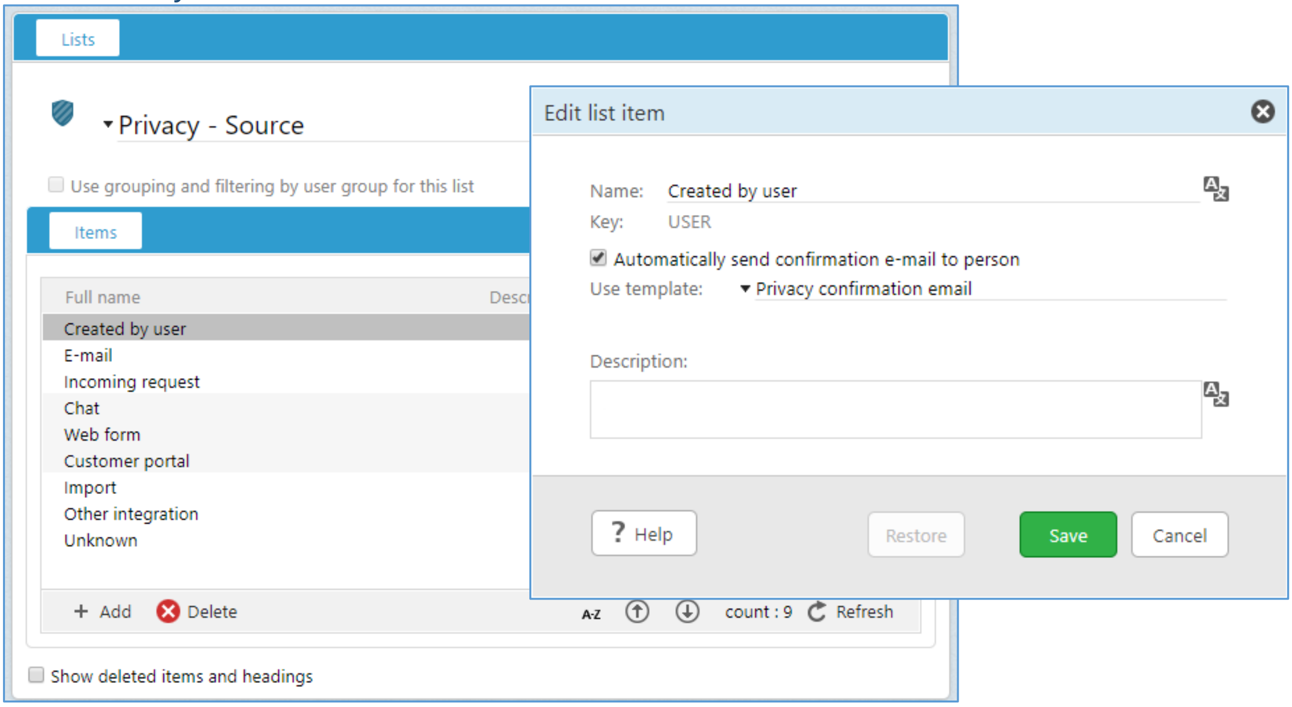
A new navigator is shown for **Privacy**. The archive shows **Purposes with tracked consent**. Some of the consents are by default mandatory and cannot be removed or deleted. This is due to **GPDR** laws and cannot be altered. All fields have the possibility to be translated to wanted languages.



The **Setting used when a person is created** is a checkbox with the dropdown of the new list for **Legal basis**.

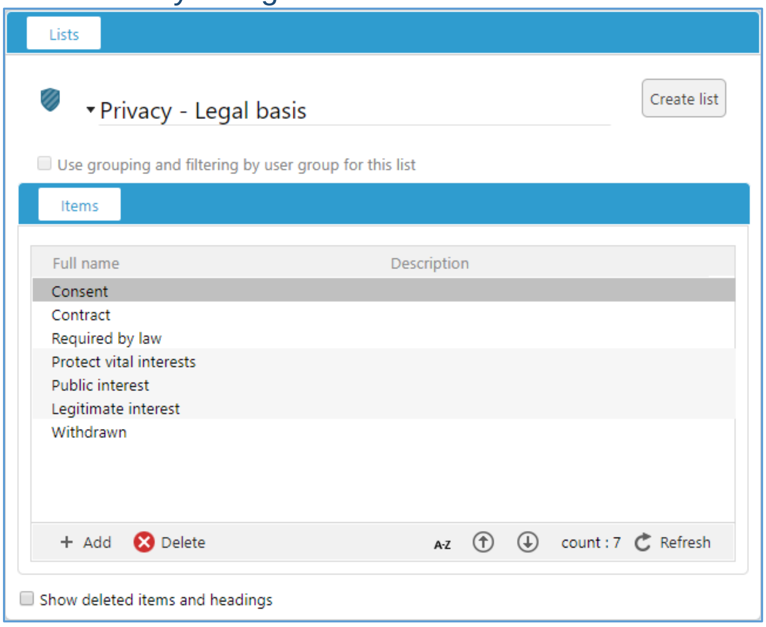
Release SuperOffice R03 – 2018.02.14:
Settings for **E-marketing privacy** can be set to ON as soon as your company are ready to use the Consent management and Subscription management system. You can still go on using the system as you have done, but eventually all companies need to take a stand on what to do about GDPR and consent for store and e-marketing.

Lists: Privacy – Source



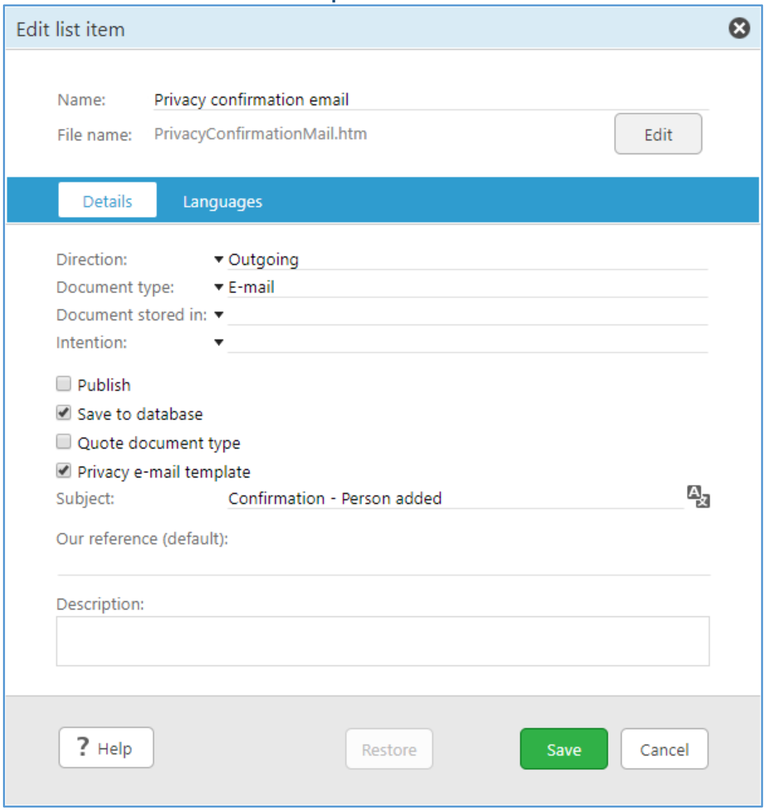
The list for Privacy Source is used for the Consent dialog for persons.
There is a setting in the list item for e-mail – **Automatically send confirmation e-mail to person** with a template selector. This is by default Off, but can be changed by your administrator.
To edit the e-mail template, go to the list for Document – Template and change it with inside Settings & maintenance.

Lists: Privacy – Legal basis



The list for Privacy Legal basis is used in the Consent dialog for persons.

Lists: Document – Template



One template has been added in the upgrade to SuperOffice 8.2.

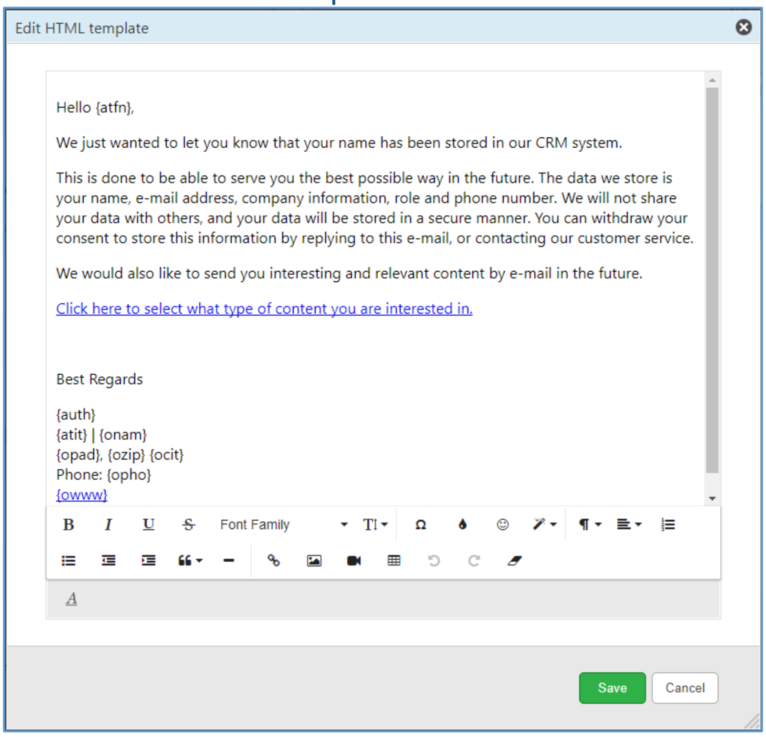
- Privacy confirmation email [PrivacyConfirmationMail.htm]

The e-mail is used for the Consent management. When a new person is added to SuperOffice (with an e-mail address) and the settings on Privacy is set, this e-mail is sent to the person.

There is also added a new setting in the Template dialog:

- Checkbox for **Privacy e-mail template**
- **Subject** for the Privacy e-mail (multiple languages)

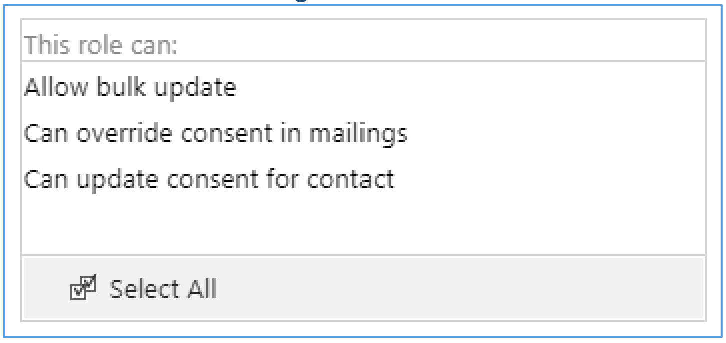
Lists: Document – Template – Edit htm files



Document templates in **htm** format is now possible to easy **edit** in the Settings and maintenance client. Open the dialog for **Edit list item** and select **Edit**, this dialog will open, and you can easily change the text and save it.
To change the formatting, just click on the **A**-icon and choose the different wanted formatting for the text.

The new **template variable** for the link to subscription management is: {asmu}.

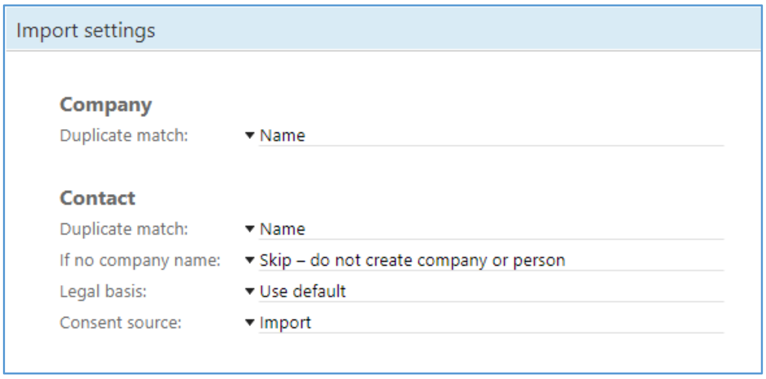
Roles – Functional rights



Some new Functional rights have been added to make sure to get sufficient rights to allow or not

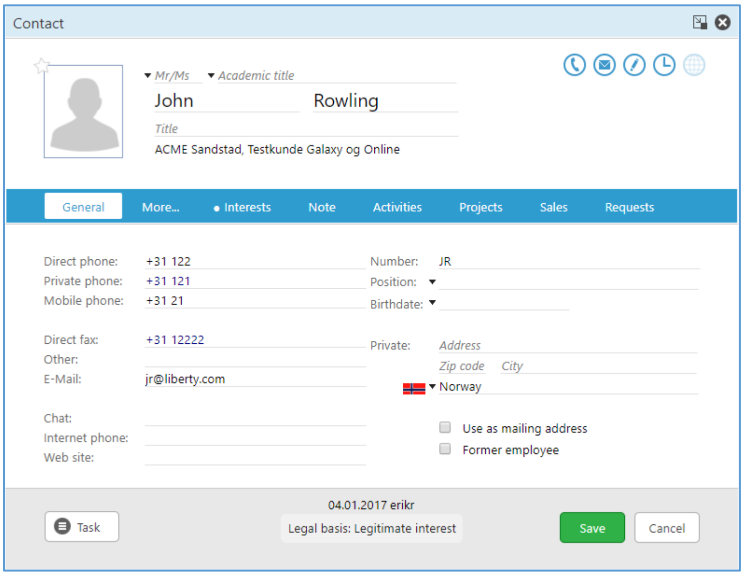
- Allow bulk update
- Can override consent in mailings
- Can update consent for contacts

Import – Settings



When running an import of persons, there is a section where you can add **Consent comment** on how you obtained the imported persons consent. And in the **Configure import settings** you can select the **Legal base** and **Consent source**.

Person card with Consent info



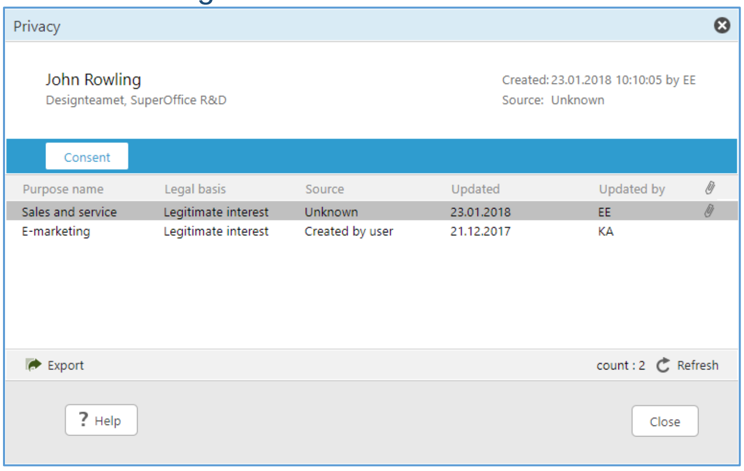
On the person dialog we show the **Legal base** information.

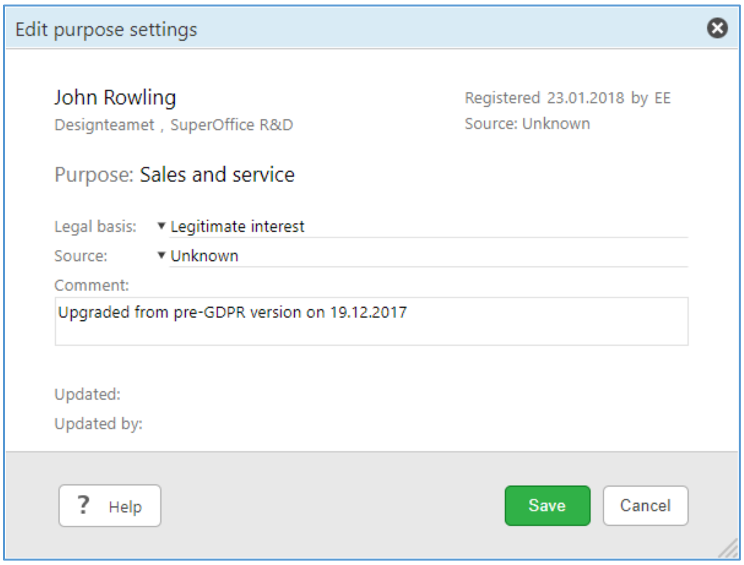
- .web shows a button with the legal base information
- .win shows a link to the Consent dialog

When you click the button/link the Consent Dialog will open.

All persons will have a consent, but the information for legal base and consent source might not have been set, the fields are empty.

Consent dialog





Opening the **Consent** dialog will show the active consents that are stored for your SuperOffice installation.

The two different consents are added when upgrading to 8.2 is:

- Store and process
- E-marketing

Those are hardcoded and cannot be deactivated/deleted.

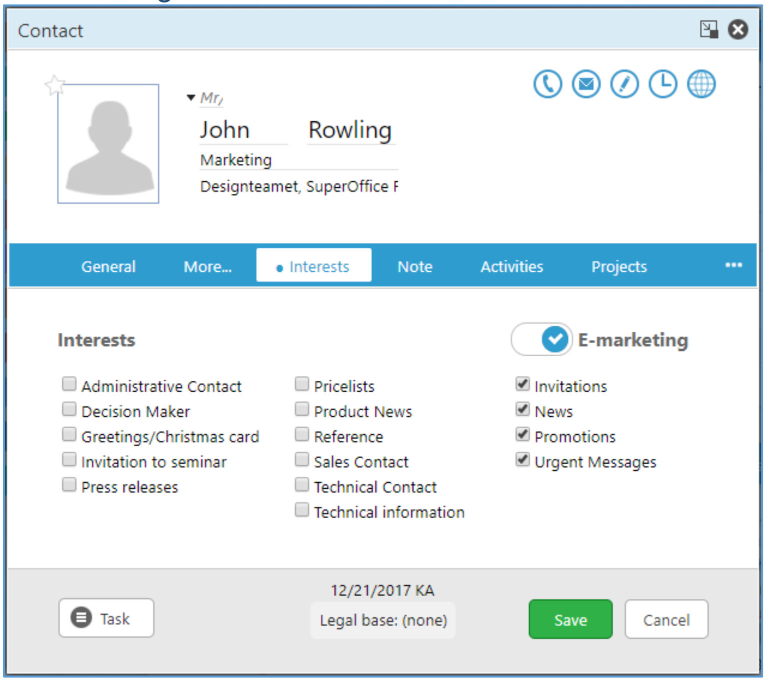
To **Edit legal base/consent**, double click the consent to change the legal base, source and comment. The fields can be set to empty, but it is, of course, not advisable.

To be able to change a person consent, you need a functional right on your role:

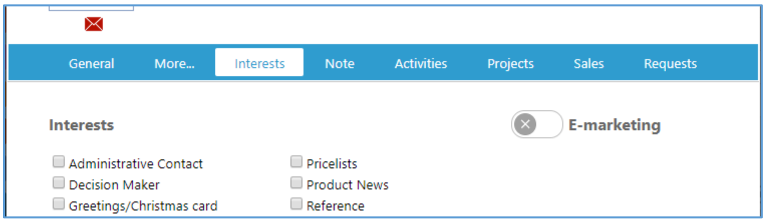
- Can update consent for contacts

Some default settings are set in the **Settings and maintenance**, and the behaviour will depend on these settings.

E-marketing consent



With E-marketing consent



Without E-marketing consent

The **Interests** tab on **Person** dialog has gotten some new fields.
Consent for **E-marketing** is visualized with a slider on the right side of the person interests.

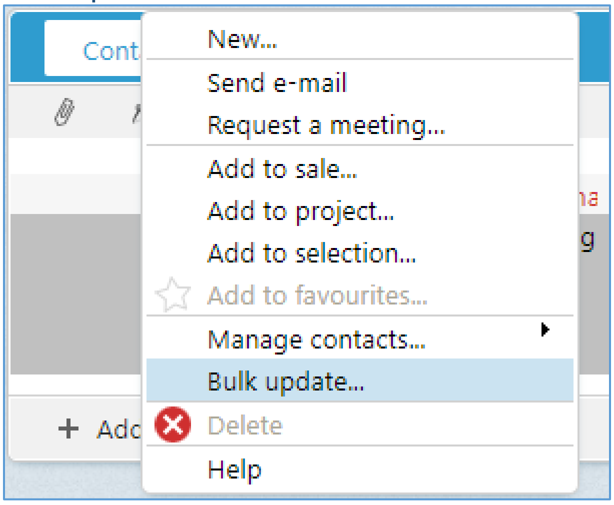
E-marketing = **On**
→ The different subscriptions will show as check boxes underneath.

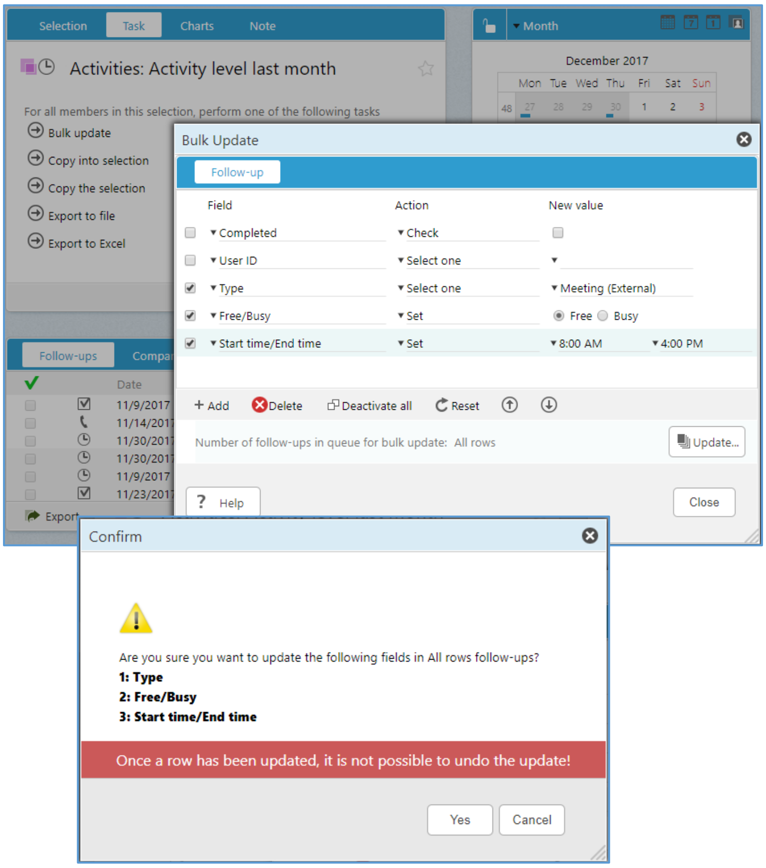
E-marketing = **Off**
→ The subscription list is hidden, but not deleted. That means it's easy to get back the "old" settings for subscription, when setting the slider On again.
You will also see that there is a red icon (envelope) underneath the person image that shows the E-marketing consent is set to Off.

You will need a functional right on your user role to be able to set E-marketing to On or Off: **Can update consent for contact**.
If the **E-marketing** is set to **On**, users with edit rights on selected persons can check on/off the different **subscriptions** for the person.

All users can set the E-marketing to **Off**. This is due to requests from the person that he/she no longer wants to receive any more mailings from the company.

Bulk update in .web





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**.

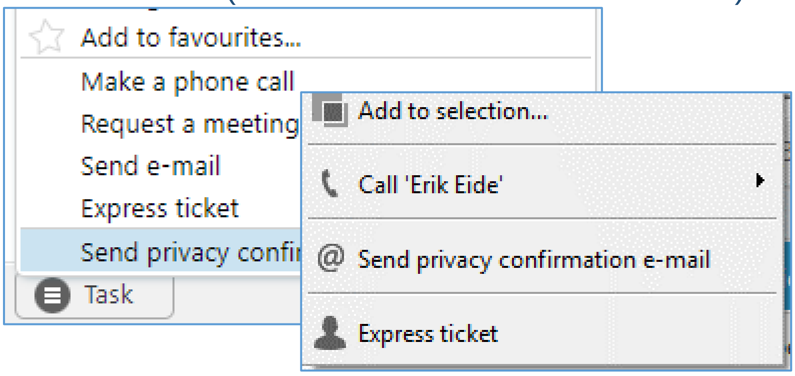
The **Bulk update** is visible as **Task** on **Selection**.
In the Bulk update dialog, you select the different fields you like to change. You can select almost all fields, inclusive your user defined fields.

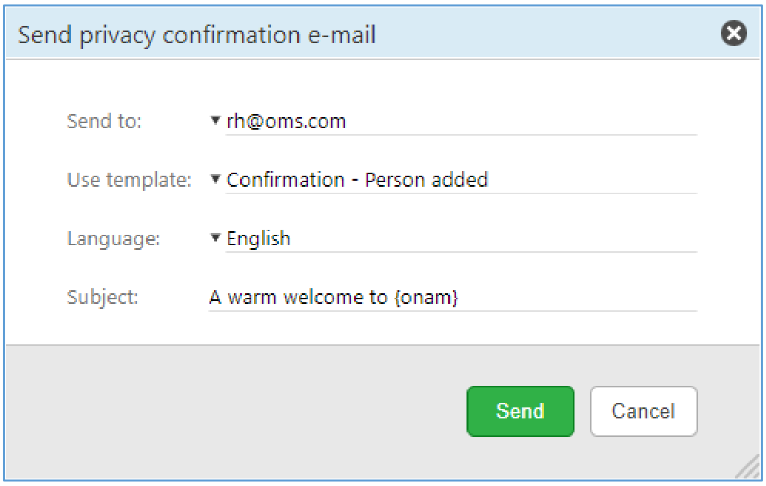
For example, you want to clean up the different appointment types, group some of them and/or delete the types you no longer need. You create a follow-up selection with the appointment type you want to remove. Select the task **Bulk update** and find the field for appointment type and select the type 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.
When the update is finished, you can check the log to see the different items that has changed or not.

The Bulk update require a functional right on your user role:

- Allow bulk update

Consent e-mail (Released 8.2 R03 – 2018.02.12-03)

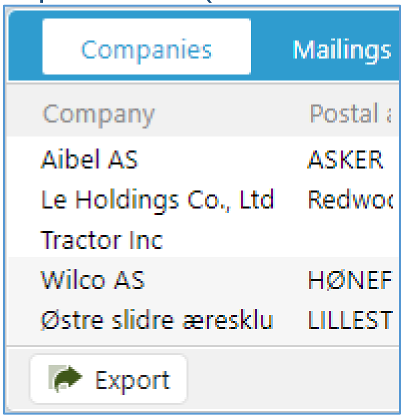


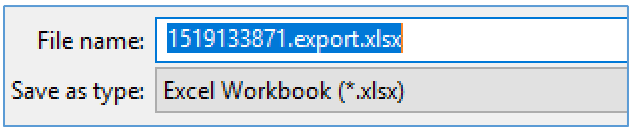


From the person dialog you can resend the **Privacy confirmation e-mail**. With the option **Send privacy confirmation e-mail** from the Task menu, it's easy to send it in wanted language, and to the correct e-mail address.

With this feature you can also send to existing persons that have never got the confirmation e-mail.

Export to xlsx (Released 8.2 R04 - 2018.02.22-05)



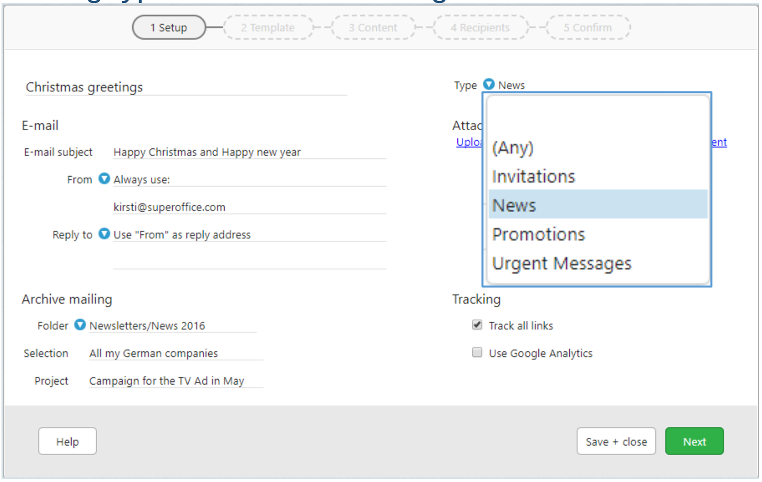


The export functionality supports the newest version of Excel – xlsx. The older version of Excel – xls – only supported 10.000 rows in one sheet.

When you now want to export more then 10.000 rows, it's possible to export in one action.

New and improved Mailing

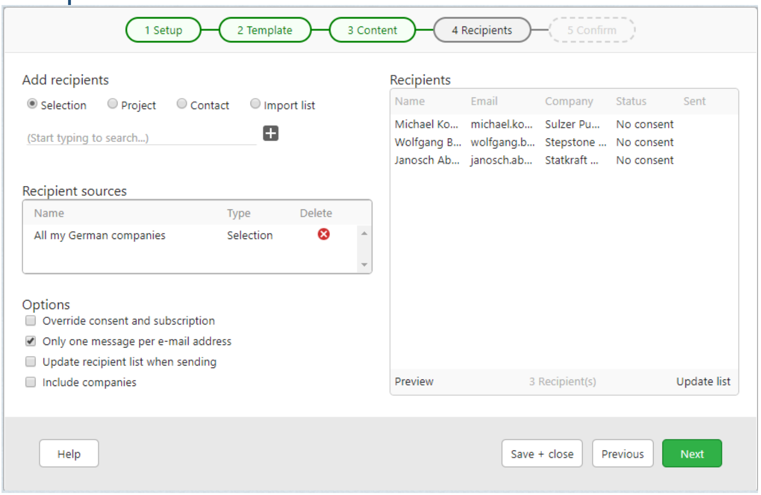
Mailing type is added to Mailing wizard



In the setup screen on the wizard for e-mail mailing, the field for Type shows the different subscription items added to your SuperOffice.

There is also an option for Any. That type is used when you have added multiple recipients with multiple subscription and you want to send the mailing to all of them.

Recipients list with No consent

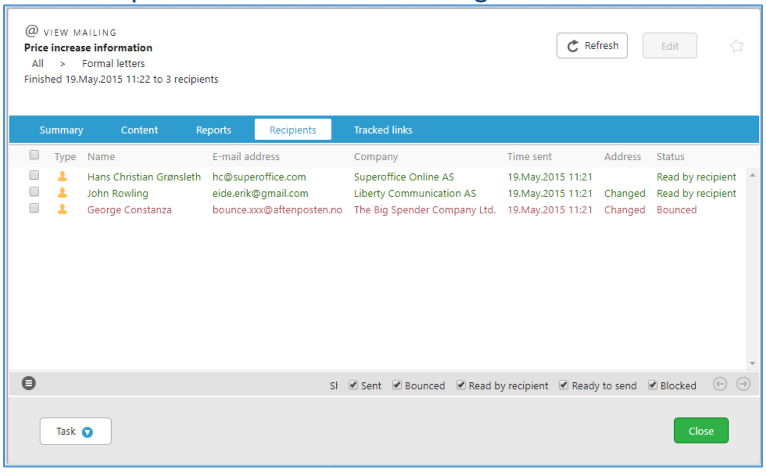


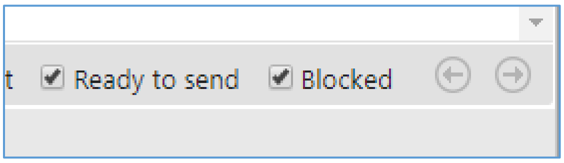
The wizard showing the Recipients have some new settings.
When you select the option for **Override consent and subscription** to “On”, all the recipients in the list will get the mailing.
The field for Override consent and subscription require a functional right on your user role:

- Can override consent in mailings

On the Recipient list you can see if some of the recipients don’t have the correct consent or consent at all. The **status** will show **No consent** if the recipients is not checked for the mailing type or have E-marketing consent off.

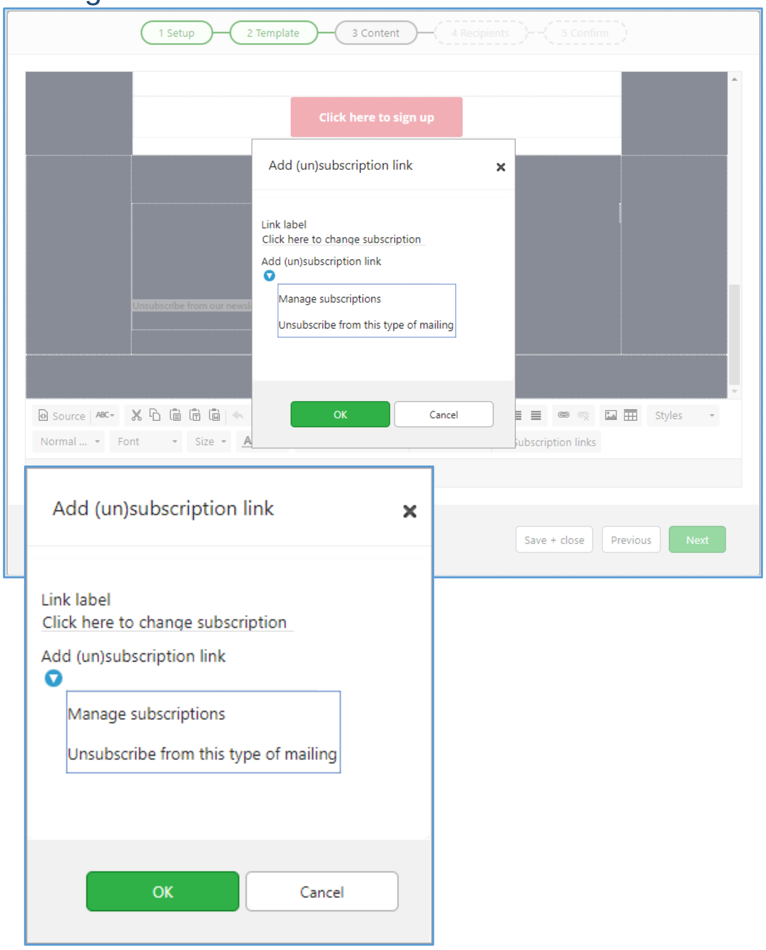
View recipients on finished mailings – Blocked





If you go to **View mailing** and the tab for Recipients, you will see that it's now possible to select or filter on **blocked** recipients.
Set the check box for Blocked to On, will show all recipients that is either duplicate or have No mailing/E-marketing=Off.

Mailing – Edit the e-mail



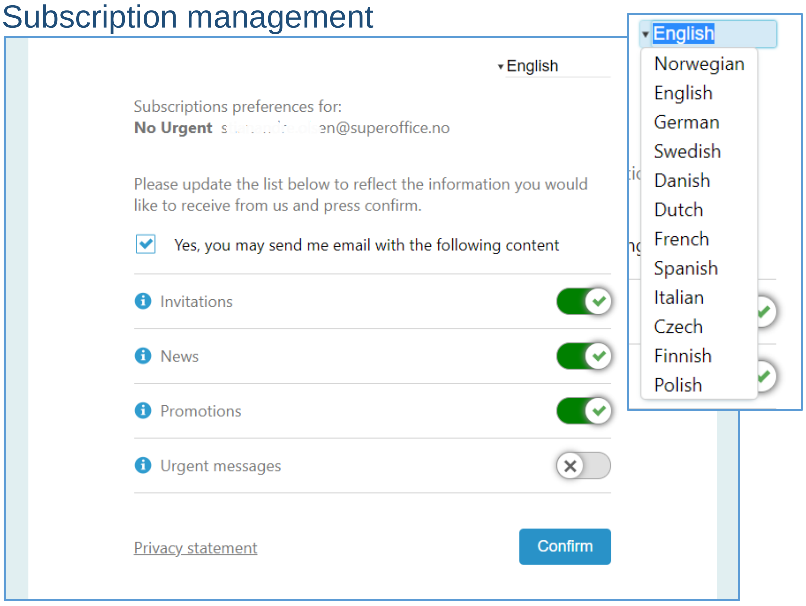
When you edit an e-mail mailing, you will see a new button for Subscription links.

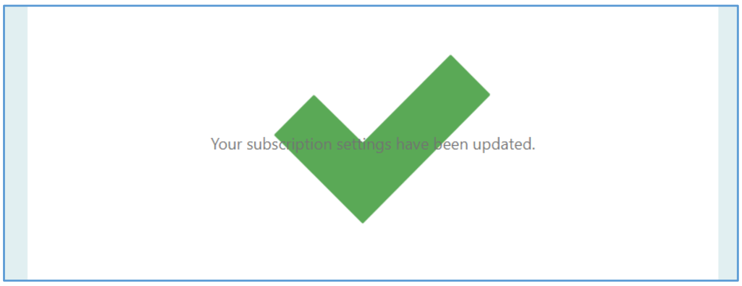
You have two options in the drop down:

- **Manage subscription**
  A page opens for the person, where the person itself can change the different types of subscription he/she wants.

- **Unsubscribe from this type of mailing**
  The specified subscription selected in the **Mailing type** of the Mailing, is removed from the person subscription types.
  If the **Mailing type** have **Any** as type, it is impossible to know what to remove and nothing happens on the person subscription.

Subscription management





There is a link that added in all the e-mail mailing and the e-mail sent to each person. That link will open a html page where the person can change the wanted subscription.

When changing the different settings and clicking save, will automatically update the Person card in SuperOffice.

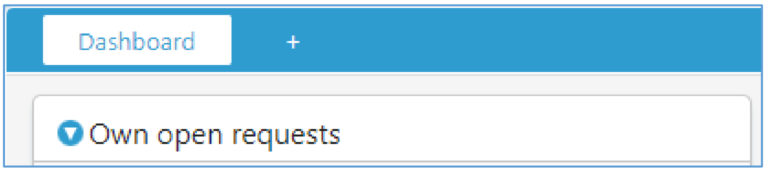
If the user check ON for the check box:

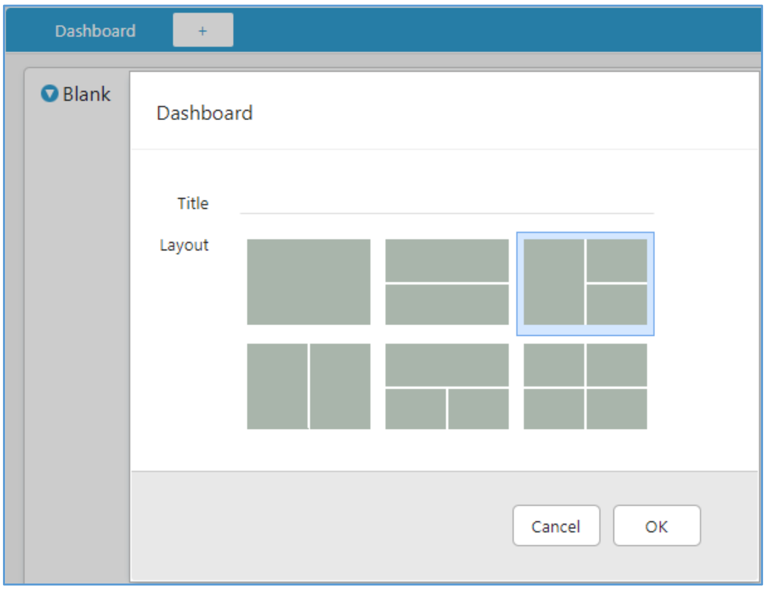
- I do not wish to receive e-mails from you in the future.

That will automatically set the slider for E-marketing to OFF on the person card in your SuperOffice installation.

New and improved Service client

Dashboard



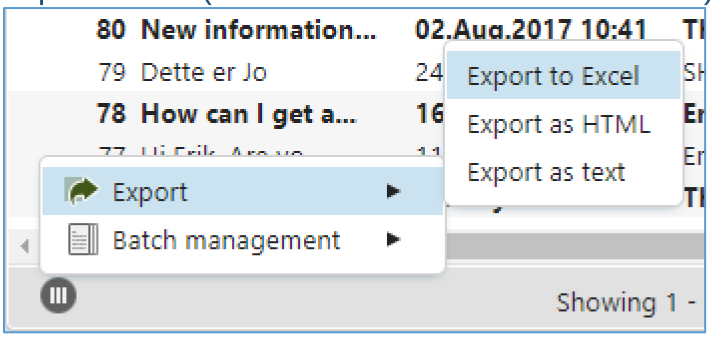


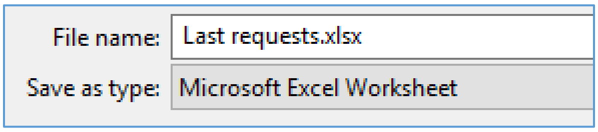
You have the possibility to create new Dashboard tabs in Service.

Click on the + tab and add wanted tab title and layout, and then select the wanted tiles in the new dashboard tab.

Easy and quick to get better overview of different request groups and overviews.

Export to xlsx (Released 8.2 R04 - 2018.02.22-05)

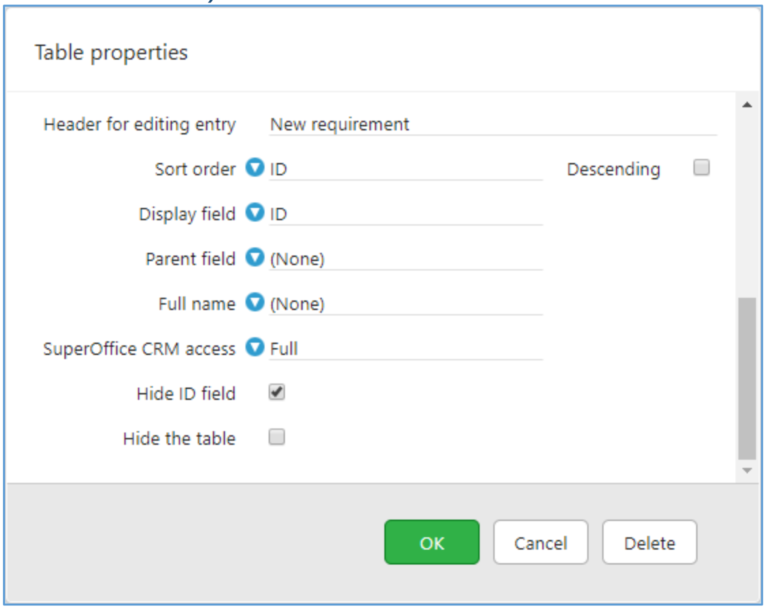


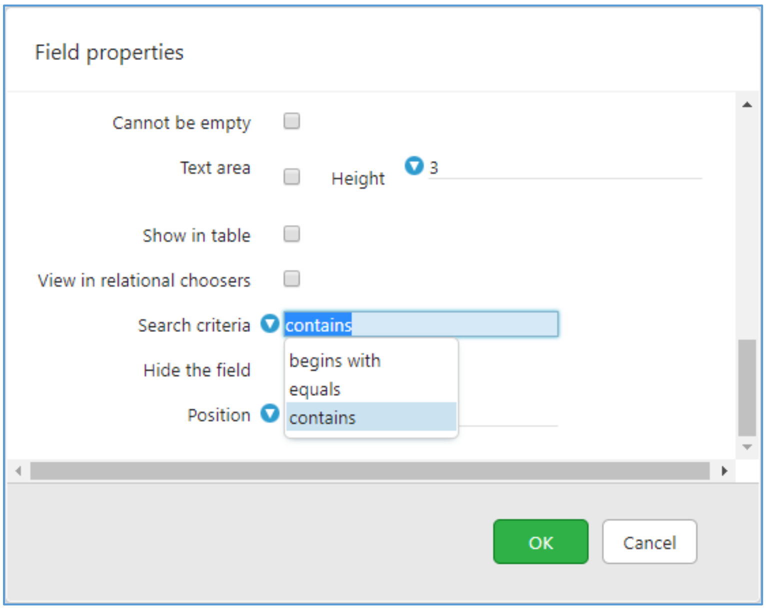


The export functionality supports the newest version of Excel – xlsx. The older version of Excel – xls – only supported export of less than 10.000 rows in one sheet.

When you now want to export more than 10.000 rows, it’s possible to export in one action.

Extra table – search options (Released 8.2 R04 - 2018.03.09-05)





When creating extra table in Service, you can now select Hide ID field and the field is actually hidden for the user when using the relation search component.

On the extra tables and fields, we support different search operators on the columns of the extra table, so that the component (HtmlSelectExtraRelation) used to search for an entry in this table would allow "begins with" or "contains" in the columns.

The different fields you add in a table can be searchable for the user. The settings for the search criteria is

- Begins with
- Equals
- Contains

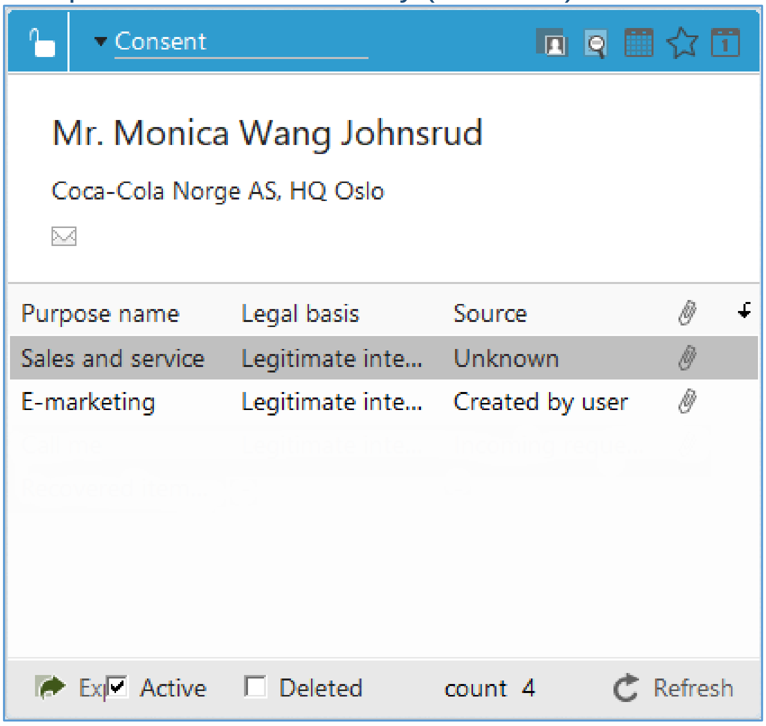
New and improved Windows client

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 done a lot for GDPR and not so many features outside the GDPR world.

Mini panel – Consent/Privacy (Windows)



If you are checking out all the persons in a person selection, it is very convenient to be able to see the Privacy/Consent settings on each person in the mini panel.

Like that you can be very efficient to check and change the settings on the ones that are not correct.

The rights to change the Legal base/consent a functional right on your user role:

- Can update consent for contacts