SuperOffice AS

What's new in SuperOffice 8.3

SuperOffice AS – Research and Development Updated: 30 July 2018

Summary of Highlights

SuperOffice 8.3 - is the current major upgrade of the SuperOffice CRM platform.

In our work to make a better connection between Service and CRM, we decided to give the contact its own main card. And not only that, a contact doesn't have to have a company linked, meaning you can save a contact without a company.

In our quest to make CRM and Service even more tight, this was the way to do so. Contacts without companies are possible in Service, but not shown in CRM, therefor we had to make the same possibility to show contacts without companies in CRM as well.

And since contact now is a main card, the SAINT for contact are now available with all the possibilities to have monitors and search for specific SAINT counters.

A recycle bin for companies and contacts are also introduced in this version. It means you can still restore deleted companies and/or contacts if you have deleted some by mistake.

We hope that you still can find everything you need, intuitive and easy.

New functions in the sub release of 8.3 are added to this document:

- 8.3 R02 Contact Privacy report (only available in Web client)
- 8.3 R03 CRM Online release, will be available in 8.3 R04 for Onsite

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20
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Contact as main card Dashboard Company Contact Contact * Mr. Monica Wang Johnsrud Coca-Cola Norge AS, HQ Oslo Title: Service Center Manager Our contact: Per Æpåsi Bjørnesen E-mail: Office e-mail : Monica.Wang.Johnsru Category: Supplier Mobile phone: +47 3333333333333333 ¢. Business: Trade Direct phone: +47 11111111 ¢ Number: 1000012 Home address: Monicaveien 8 Academic title 0230 OSLO Norway Use as mailing address Former employee 19.04.2018 CW Legal basis: Legitimate interest Task \odot \ominus Edit Date 29.06.2018 Private Vacation FF Happy meal at McDonalds The published quote will soon expire. Check with the cu More information is required to establish this as a prop-Muffin call - Get status - Are you happy - Would you lik 28.06.2018 27.06.2018 26.06.2018 22.06.2018 Lunch Follow-up Follow-up Phone-Out New project - New pos EE 21.06.2018 Proposal Update/confirm proposal EE Phone-Out Call regarding meeting next week. Do we agree on the Visit Presenting news to the management team C 20.06.2018 EE EE 19.06.2018 Visit Presenting news to the intragement can't Phone-Our Get verbal agreement on the proposal Meeting (E Red carpet meeting - How can we improve our coopera Follow-up Follow up customer. 18.06.2018 EE 15.06.2018 EE EE (b) (v) 15.06.2018 + Add 😣 Delete 💠 Filter 🍺 Export 🗷 Mailings Documents Chat ✓ Follo Show co C Refr

A new main panel for Contact are added to our family of main panels. The contact dialog is history and you can see a new navigation button for **Contact**.

All existing fields and tabs are still visible, but some has been kept on the main contact card and some has moved down to the section tabs underneath the main card.

To come back to the connected **company**, it's just to click on the company link below the contacts name.

We hope that this makes it easier to work with a contact and to find what you are after on a bigger area.

Contact navigator fa	ist search
Contact Details More	Interests Note WWW
JJ Company name	<u>Villam</u> Johansen 🏠
Contact	Contact
0 * Q	0 * Q
Johnnie Winters (Lots Of Pers	John Georg Storvik
John Willam Johansen	John Holder (Lots Of Persons xxx, Folket)
Audun Johnsen (Wj Business	John Johnson
Monica Wang Johnsrud (Coc	John Johnson (RPC Superfos A/S)
Monica Wang Johnsrud (Coca	John Landström
Monica wang Johnston (Coca	John Morris
-	John-Arne Kvamsås
john <u>wil</u> joh	Johnathan Jordan (Lots Of Persons xxx, Folket) Johnathan Velasquez (Lots Of Persons xxx, Folket)
	Johnnie Carter (Lots Of Persons xxx, Folket)
	Johnnie Winters (Lots Of Persons xxx, Folket)
	Johnny Rush (Lots Of Persons xxx, Folket)
John Willam Johansen	John Willam Johansen
	Mitchell, John

The navigator search for contact will now search for all names; **first** name, **middle** name and **last name**.

Ex. John William Johansen You can search for both

- john wil
- john joh

And both will hit John William Johansen.

Or you can actually search for the 3 first letters inn all the names (first, middle and last).

Contact without company								
Contact	Details	More	Interests	Note	W	ww		
HM Ha	ns Mong	stad						
Title: E-mail:	hara Quille			Our contac		Kirsti Aake	rholt	
E-mail: Mobile phone:	hans@tull.r			Category: Business:		Supplier IT		
Direct phone:	147 000 12	5 652		Number:				
Private:	Sonveien 1 2100 SKA	2 ARNES		Academic t	itle:			
	Norway							
	Use as	mailing addr	ess					
E Former em	nployee27.03	.2018 KA	Legal basis: (Contract	🖨 Task	¢	⊖	Edit

It is now possible to save a contact without a company.

This makes it possible to add a contact before you know more about where he or she works. Or if you have contact to a private person.

Our contact, Category and Business on contact card

Contact	Details	More	Interest	s Note	www	
HM T	pany name	Hans	ſ	∕liddle nam	e Mongstad	
Title: F-mail:	<i>Title</i> hans@tull.	no		Our contact: Category:	 ▼ Kirsti Aakerholt ▼ Supplier 	
Mobile phone: Direct phone:	+47 856 12			Business: Number:	▼ IT	
Private:	Sonveien 1 2100 SK	I2 ARNES		Academic title:	▼ Academic title	
	 Norway Use as 	mailing addre	SS			
Former em	ployee	27.03.2018	KA Leg	gal basis: Contrac	t Save Car	ncel

To be able to group and select correct information, there is three fields on the contact panel.

If the contact has no company, you have the possibility to choose the value that is correct for the contact.

If the contact has a company, the fields displays the companies value. These fields are always in sync, so changing the company values will automatically be synced to all contacts linked to that company.

Three new fields from Service are added to the contact card.

The fields are:

- Language
- Request priority
- Support associate

These fields are used mainly for requests and how to handle different languages on request templates. And the preferred language will be visible for the user in the Customer Center.

There is a licence check on the fields if you have any Service license. If you don't have any service licence in the company, there is no place to edit these fields, and therefor no reason to show them (yet).

New fields on contact linked to Service

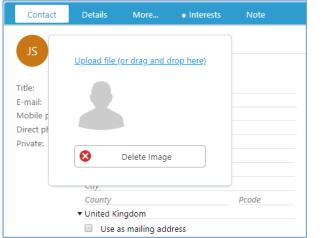
Contact	Details	More	Interests	Note	www	
HM Co	mpany name	Hans	Mic	ddle nar	me Mongstad	b
Private phone Direct fax:			Positi Birthe		• •	
Other: Web site: Chat:			Priori	1 - C	 ▼ English ▼ Medium te: ▼ Erik Eide 	
Internet phone	e: mployee	27.03.201	B KA Legal I	basis: Contr	act Save	Cancel

Contact wi	ith ne	w default	image		
Contact	Detai'r	Contact	Details	More	 Interests
.	Mor -Cola I	ol w	han Wilh	elmsen	
Title: E-mail: Mobile phone: Direct phone: Private:	Servi Offic +47 +47 Mon 0230 Norv	Title: E-mail: Mobile phone: Direct phone: Private:	johan@tu +47 8527 +47 1234 Fjellveien 1620 Norway	41963 5678	

We introduced the new default image in Inbox, where a contact was displayed with a coloured circle with the initials.

This has been implemented on the main contact card as well. Those of the contacts that has an image uploaded will off course still show the person image.

Contact - Upload image with drag and drop possibilities



To upload a new contact image, you just go into Edit mode, click on the default image icon. You can **Upload file** or **Drag and drop** into the area.

In .win client you right click, select Add to Upload file in the Windows Explorer dialog, or Drag and drop an image into the Contact card in edit mode.

Quick and easy.

Move contact between companies or disconnect company

Conta	ict	Details	More	Interests	Note	www		
НМ	•		Hans	Mic	ldle nam	e Mongst	ad	
	▼ mo	ong					Q	
Title:	(No	Selection)						
E-mail:	Mor	igstad Bruk						
Mobile p		+47 856 1	123 852	Bu	isiness:	▼ IT		

You can easy link a contact without a company to an existing company in the contact card.

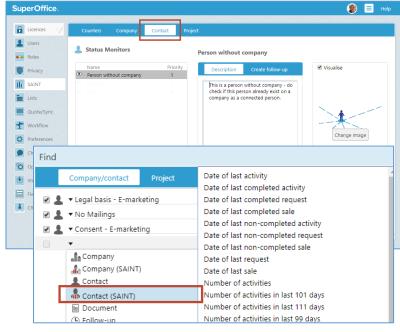
But to move a contact between companies, you need to use the **Move contact** function.

Disconnect a contact from a company with Move contact Move Contact Johan Wilhelmsson JW Orkla ASA, HQ Action on contact: ○ Move to ▼ Q Oisconnect from Orkla ASA Action on all existing activities and sales: C Leave all on Orkla ASA, HQ C Move all to ... C Move all activities starting after: 27.03.2018 Show results: 3 ☑ Show the contact card after the task is completed ? Help <u>C</u>ancel

Together with the possibility to save a contact without a company, you also have the possible disconnect the contact from the company.

Open the **Move contact** dialog and then select **Disconnect from xx** to set company as empty on the selected contact.

SAINT for Contact



Contact have its own SAINT criteria and you have the possibility to add **SAINT monitors** for Contacts as well as Company and Projects.

You will have the same number of criteria to chose from in the client for **SAINT** on **Company**, **Contact** and **Project**, on both Find and Selections.

Just to be creative and you will find what you are looking for.

Recycle bin			
Preferences Edit personal e-mail signature E-mail options Show my Contact info			From your Personal settings menu you can get to the Recycle bin and see all the deleted companies and contacts you have made.
Kirsti Aa Custom Consister Custom			The Recycle bin dialog shows one tab for Company and one for Contacts .
	contacts that have been deleted recently. You may restore cc as and contacts will be in the recycle bin for 15 days.	©	There is a check box View deleted companies/contacts for all users showing if you have the functional
Company Contact Contact and company First name Monica Wang Johnsrud (Coca-Cola Norg- Monica	Last name Title Wang Johnsrud Service Center Manager	Category N Prospect 1	right for General administrator. This means an administrator can empty the recycle bin for all users.
			If you have deleted a company, all the connected contacts will also be deleted. If you then restore the company
Restore	View deleted contacts for all t View deleted contacts for all t	users count : 1 C Refresh	again, all the contacts will also be restored. If you only restore one of the contacts
			on the deleted company, the company + only the selected contact will be restored, not all of the contacts. If you delete a contact without any company linked, then only the contact will be restored.

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-		
Personal data registers	é.	
128#		
E-mail		
Moliske phones		
Courtry		
humber:		
Our nontact:		
Category	Conjetitor	
Businessi	Services	
Number P1-pl05	1001 BULK UPDATEDI	
Text P1-as05 Sumpble field (af05)	0.03	
Number -> Decimal GR		
Not text (a08)	0	
UDDRT 1 (#04)	0	
Consent Source (Altri)	0	
Lagel Besis rainty		
Mailing type (alt1)	0	
Registered:	20.10.2015 12:05	
Updatait	15.11.2017 1554	
Why have you been re-	patered? What consent have you given?:	
Purpoint	Logal baris Saance Dete	
Sales and service	Legitmute interest - Uriknown - 20.01.2010	
	Copyrede (rom pre-CD49); Lepiblenale Antonio!	
Crearbing	Withshawn — Linikosom — 20.11.2017 Laggrade Anni pre-scoren person versiong was set	
	af Baare been hat der en bester and Baare and	
	activities and communication:	
17 Follow-upt	Appointment: 16, 3odii: 1	
	Contract of	
1 Documents	Unknown 1	
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aratiege .		
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7 Help	Seried as oursait Save as PDF Cancel	

From the Task menu on the Contact screen you will find an option for **Generate personal data report**. (In Windows you will find it under: Contact file menu – BUT the feature is not released yet due to some technical problems.)

Clicking this will open a dialog with all the information that is stored on the particular person. You will see the **Personal data registered** section, **Why have you been registered?...** and the last, **Total number of stored activities and communication**, with the contact.

You have two options for this report on the selected contact: **Send as email** or **Save as PDF**. This use the same pdf-writer as used for the Sales quote system, so you don't need an extra handler for this.

Preferences			Some companies will have a policy
Freetext search Functions	٩		that it's not allowed to save persons without a company.
Preferences		Mandatory company on contact	
Limit for auto-loading	*	All contacts have to be connected to a company. (Default = NO)	In Preferences on the Function
Mandatory company on contact			
Mark overdue activities			section, a preference Mandatory
Participants from group view			company on contact is added.
Remove Company card corner tabs			company on contact is added.
Remove invitation duplicates			
Show browser script error dialog			
Show confirmation dialog Show days ahead			Setting it ON will always prompt to
			save a company with a new person.

Lists – Search for list items

Lists			
✓Fo	llow-up - Typ	e	🗹 Use groupin
Items	User groups	Headings	
phone		9	
Full name		Description	
Phone-Out	:		
Phone-In 38181 - Ph	one out - No Free	38181 Phone out	t - No Free

Some lists tend to be very long, and to quickly find the correct list item, if you know the name, is to search for it. The search result will be shown in the items list.

Lists – View lists by user groups or heading

· FOI	low-up - Ty	pe	⊻ 0	ise groupi	ng and filtering	g by user group for this list	Create li
Items	User groups	Headings					
		9		List iten	ns available to	this user group:	
Name	Descriptio	n			Name	Description	
Sales					Meeting (Inte	err	
Services					Meeting (Ext	eri	
Technical					Phone-Out		
Marketing					Phone-In		
Administrat	ion				Follow-up		
PerAdminTe	est				Planning		
					Visit		
_				-	the second s		
+ Add 🔀	Delete			P 5	elect All 🗗 U	Inselect all	

When you use grouping and filtering by user group, click the different tabs for **User groups** or **Headings** and there select wanted user group or heading and then check the different list items to be shown.

New and improved Mailing

neeeuge terri			1(00)	When you are working with r
Mailings	Message templates	Tracked links	Images	message templates, you sor
				want to move a message te
	Recent		All tem	are happy with.
Recent templat	es			To do so, it is now possible to message template, including links. Just click the menu but select Export . A Save as dia where you can select the follow
Season greeti The transformed of the transformed of		ting - Win		the json-file.
Kirsti Aakerho E-mail 16.Feb.2018	t View Edit Create mailing Make copy Move to folder			To import a message temple upload a json-file, that will in images and links. Click the l u button and choose the wante the dialog (you can also drag a Windows explorer window)
	Delete			æ Import
Add e-mai	Export		lmport	File Choose file No file chosen

Message templates – Export & Import (8.3 – R03)

mailing and netimes mplate you

to export a g images and tton and alog opens der to save

> 👆 Downloads	
> 🁌 Music	
> 📰 Pictures	
> 📑 Videos	Calm blue.json Morning meeting.json
> 🏪 Local Disk (C:	
File name:	Season greeting - Spring greeting.json
Save as type:	JSON File 🗸
∧ Hide Folders	Save Cancel

ate, just clude all mport ed json-file in g&drop from).

Æ	Import	
File	Choose file No file chosen]
		OK Cancel

Images in the template are imported to attachments, but not created as External documents (i.e. shown under Images).

If there are **links** in the template, they will be created on the root link folder, EXCEPT if there already is a link with the same name. Then we will use the existing one instead and not create a new one. That means it's easy to create one Social media link and keep the one updated.

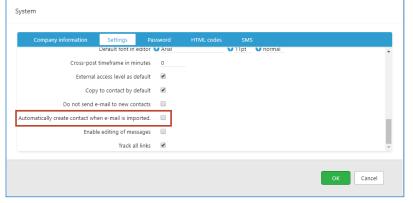
New and improved Service

Contact with Our contact, Business and Category

💄 Contact prop	erties				
Our contact	0				*
Our sales contact	오 Erik Eide	1			
Category	Customer				
Business	🔽 Legal				
Company	(Start typing to search)		×	Automatic	
Company access					
Notes					•
			ок	Cancel Delete	

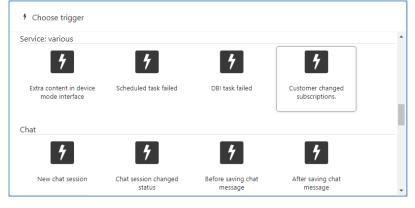
On the contact screen you can see the Sales contact, Category and Business fields. If the contact are linked to a company, it's the company values that shows in these fields.

System Setting - Automatically create contact on/off



To be able to control the quality of companies and contacts added into SuperOffice, the check box for **Automatically create contact when e-mail is imported** can be set to OFF. Like that a contact with an email address that is not stored in SuperOffice will not automatically be added as a new contact.

CRMScript Trigger – When Subscription change



Together with a lot of different GDPR functions that is implemented in SuperOffice, a new Trigger has been added, for **Customer Changed subscriptions**.

Easy to hook into, if one of your contacts changes their subscription, that the contact should be added to a certain project or selection.

CRMScript - Try-Catch method

```
// Example of catching one of our Exceptions
try {
  printLine("Before execution");
  SearchEngine se;
se.addField("foo.bar");
  se.execute(); // Will fail
  printLine("After execution");
}
catch {
  printLine("Exception caught: " + error);
}
printLine("After try-catch");
// Example of throwing your own
try {
   throw "This is my own error";
}
catch {
printLine("Exception caught: " + error);
}
```

CRMScript should support try-catch so that developers better can handle errors.

Windows and Web application – Overview of the differences

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

•

Contact	Details	E-marketing	 Interests
		Wang Johns AS, HQ Oslo	srud
Invitations			
News			
Promotions			
Urgent Messa	ges		
🗖 Former em	ployee 2	27.03.2018 KA	Legal basis: Legitima

In the main panel of Contact, there is now a tab for **E-marketing**. In this tab you'll see if the consent for Emarketing is on or off, and also all the different **subscriptions**.

Privacy dialog with live update of purpose

🏹 Privacy					×
Johan Wilhe	Imsson				
Orkla ASA, HQ					
_					
Consent E-m	arketing				
Purpose name	Legal basis	Source	Updated	Updated.	Ø
Sales and service	Legitimate interest	Created by user	26.02.2018	KA	
E-marketing	-	-			
Call me	-	-			
Recovered item with	-	-			
📝 Edit 🛛 庵 Export		Active 🗆 Delete	d count 4	4 Ĉ	Refresh
Sales and se	rvice Legitimate ir		user		
Comment:					^
L L					· ·
? Help	26.02.20	010 KA	Save	Cance	
: <u>н</u> еір	26.02.20	JIO KA	Save		

In the **Privacy** dialog you have the possibility to change the settings directly in the dialog, if you have the user rights.

You don't need to double click the purpose and change it in the **Edit legal basis** dialog, just change the purpose in the lower section of the **Privacy** dialog.

references			
e-mail 🗙 Q	@	Address separator:	
Archives	- @	Display confirmation dialog before e-mailing:	C YES! C No
Default values	@	E-mail client:	▼ SuperOffice
Diary	@	E-mail client installed:	• YES! O No
E-mail	@	Fax protocol:	
Expander	@	Fax software installed:	C YES! C No
D Functions	@	Invite associates by e-mail:	C YES! C No
Person	@	Invite contacts by e-mail:	C YES! C No
Sale	\$	Quote by E-mail:	○ YES! No
	\$	Send order confirmation by e-mail:	O YES! O No
Section tabs	@	Synchronise inbox periodically:	O YES! O No
Sorting	@	Use e-mail body from SuperOffice for reply and forward:	C YES! C No
System			
Travel	•		

Use the **search** field in the **Preferences** dialog to easy find what you are looking for. You can still select the different sections and browse, but if you know the name of the preferences or a wording you're looking for, it's easy to use the **search** field.

Preference – Skip former employee in fast search and stepper

File Edit View Company	Contact Diary Sale Project Selection
SuperOffice.	Contact Details
	✓ E-marketing
Dashboard	Interests
	More
Company	ERP
Cantant	Note
Contact	
Diary	Activities
	Sales Requests
\$ Sale	Relations
Project	Projects
	Havneweb
Selection	Previous
	Next
Inbox	Find
Reports	 Skip former employees
	😢 Delete
Mailing	Move contact
🔶 Service	Merge contacts

To be able to effectively fast search and use the stepper (arrows left/right), a preference for **Skip former employee** is visible in the .win Contact file menu and .web Contact Task menu.

If you set the check to **ON** for the **Skip former employee**, when searching for contacts, no former employee will appear in the search result list. Same goes for using the stepper right/left, the stepper will skip former employees.

When using **Find**, all contacts will be shown. If you want to "hide" former employee, you need to select the criteria for Former employee set to No.

And of course, if the setting is set to **OFF** on **Skip former employee**, all contacts are shown in fast search result list and when stepping left or right.

The preference is only showing in the Task/File menu, not in the Preference dialog.

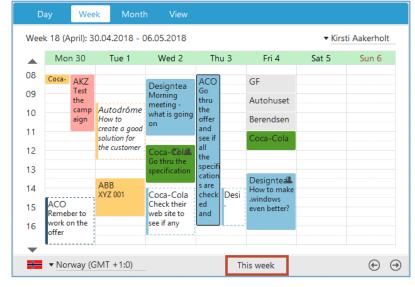
references						8
Section tabs	Contact	t				
Section tabs	Show	action buttons		Yes	s 🔘 No	
	Skip f	ormer employees		Yes	s 🔘 No	
🗸 Default values	Show	a warning when char	nging a persor	n's company 🔘 Ye	s 🔘 No	
Diary						
ai,						
	Contact [Details More	Interests	E-marketing	g ERP	N
				G		
E-mail	Jw Johar	n Wilhelmsen		(€ ₹
@ E-mail	Jw Johar	n Wilhelmsen		() @ Ø (€ €
	JW Johar	n Wilhelmsen		Our contact:	Kirsti Aakerholt	€ €
 E-mail Contact 	Title: E-mail:	External consultant johan@tull.fjall	@	Category:		€ €
	Title: E-mail: Mobile phone:	External consultant johan@tull.fjall 852741963	@ {	Category: Business:	Kirsti Aakerholt	€ €
Contact	Title: E-mail: Mobile phone: Direct phone:	External consultant johan@tull.fjall 852741963 12345678	-	Category: Business: Number:	Kirsti Aakerholt Supplier	€ €
	Title: E-mail: Mobile phone:	External consultant johan@tull.fjall 852741963 12345678 Fjellveien 8	c c	Category: Business: Number: Academic title:	Kirsti Aakerholt Supplier IT	€ €
Contact	Title: E-mail: Mobile phone: Direct phone:	External consultant johan@tull.fjall 852741963 12345678	c c	Category: Business: Number: Academic title: Not text (al08):	Kirsti Aakerholt Supplier IT	€ ₹
Contact	Title: E-mail: Mobile phone: Direct phone: Private:	External consultant johan@tull.fjall 852741963 12345678 Fjellveien 8 1620 GRESSVI	<u>с</u> с	Category: Business: Number: Academic title:	Kirsti Aakerholt Supplier IT	€ €

To be able to call, e-mail or add a task or an appointment, a set of action buttons was visible in the contact dialog. You can now decide to **Show action buttons** Yes or No.

Some users no longer want those action buttons on the main card, since, in view mode, you can click the hyperlinks on e-mail and phone fields.

To serve both those that still want to use the action buttons, and those users that feels it's too much or don't use them, a preference is visible on the **Contact** section.

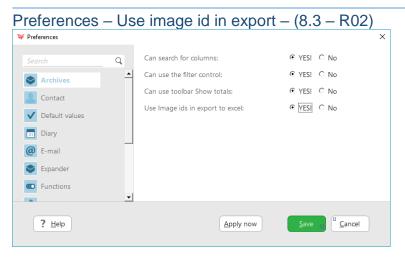




A button in the footer of all tabs on **Diary** have a button for **today**, **this** week and **this month**.

On the **View** tab, **Today** -button are also visible and brings you to today if clicking it.

Clicking will off course take you to today, this week and this month. Using the navigator list also do the same, but with a button in the footer, its quick and easy to navigate to "now" time.



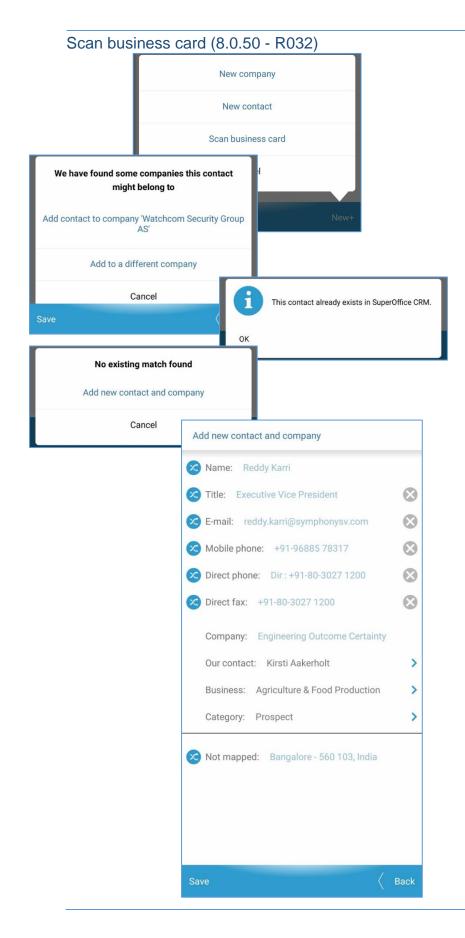
When you export an archive where you have images as one of the columns, you also get the image in excel.

That is not always very useful, especially for Completed Yes/No.

If you set the preference **Use Image** ids in export to excel to Yes, then you will get No=0 and Yes=1, and that is much nicer to sort on etc.

Pocket CRM

Default language is set to native phone language (R039)	B.0.57 - When a user starts Pocket CRM for the first time on the phone, Pocket will try to give you the wanted language.
	By checking the phones native language, Pocket CRM tries to find good match from the available languages there is.
	Languages to select is: English, Norsk, Dansk, Deutsch, Dutch, Svenska, Francais, Čeština, Italiano, Español, Suomi, Polski.
Subscription management (8.0.53 - R035)	With the introduction of the
Mr Erik Eide SuperOffice AS Product Director	Subscription management, a new section on Interest tab is added.
Interests	The first section contains of Interests , the last contains the
RnD Local Interest Beta Program invitations (09/04/2008) E-marketing	Subscription for consent on E- marketing. Clicking the arrows will
Customer Service Betaprogram invitation (02/07/2008) Get Started Program	close the section and you have mor
E-marketing	room to see all the values on the
Invitations to Events	other section.
Newsletters	
Surveys Surveys	Depending on the contact has said Yes or No to the to E-marketing
Deta Frogram martations (14774)	consent, you will see the
E-marketing	subscriptions or not.
User has opted out of e-marketing	If you're in a meeting with the
	person, you can easily go thru the
Edit interests Edit subscriptions	different subscription types and select and unselect the wanted
Back	ones.
Save	Cancel



When you create a new company or a contact, a third option to **Scan business card** is added.

With this function, all you need is the wanted business card to add, take the image and control the values added to different fields, voila the new contact is added to SuperOffice.

If the company already exists, you get an option to add the contact to the company, or you can select a different company.

You get a warning if the contact already exists, so duplicates can be avoided.

If your business card contact does not exist in SuperOffice, you get the question **Add new contact and company**. The extreme algorithm of Pocket CRM will then translate and link all the text scanned on the card and add them to the most likely fields.

It's easy to change a field that is not correct and pick the correct field. Especially phone numbers with only "logic" icons in front can be a little difficult to link correctly, which number belongs to mobile, direct phone, company phone, private phone etc.



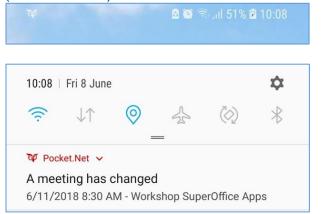
All existing tiles from the Dashboard in CRM will be available in Pocket, including the user defined tiles visible for you.

You can, to easily access the tiles you use often, add tiles to your favourites. That makes it very quick to get to your most used tiles.

Click the labels to hide/show different parts of the graph.

If you want some new user defined tiles, you add them to CRM and then it's accessible in Pocket CRM.

Push notifications of appointments in phone notifications (8.0.47 - R029)



When you are invited to a meeting, or there is a change in a meeting you are attending, a small owl (**Hugo**) will appear in the **notification** area of your phone.

Simply drag the notification area to see more about what changes has been made. If you click it, Pocket CRM will start and the selected notification is opened and you can decide to **Accept** or **Reject** the invitation or change.

So easy and quick to get a warning of a new or changed meeting.

Sales with search screen (8.0.45 - R027)

	Q	Δ		0
Sales				Q
Updating	g sales			

With the **Search** tab on **Sales** screen, you can now easily search for specific sales or companies that has sales.

Settings – Remember last visited screen (8.0.45 - R027)

Display settings		
Show appointment description:	Home screen	
Show sale title:	Last shown scree	en
Icon size: Default Show contact image in lists:	Diary	
	Contacts	
Weekdays view: Show full week (7 days)	Sale	
Default startup screen: Last shown screen	Projects	
Remember last shown tab:	Notifications	
Remember filter settings:	Dashboard	
	Images	

Under Settings and Display settings you have a setting for Default startup screen. You can now select the value: Last shown screen and not select one specific screen you want to open. It's much like you close down the CRM client, it will open up on the main card you last worked on.