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.

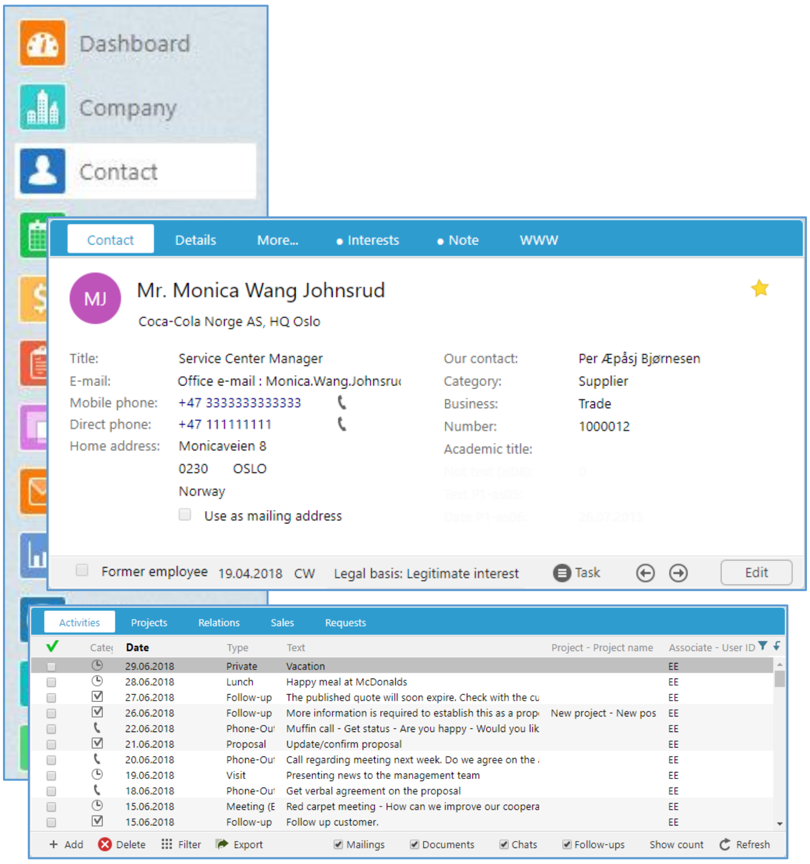
New functions in the sub release of 8.3 are added to this document:

- 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

Contents

New and improved CRM

Contact as main card



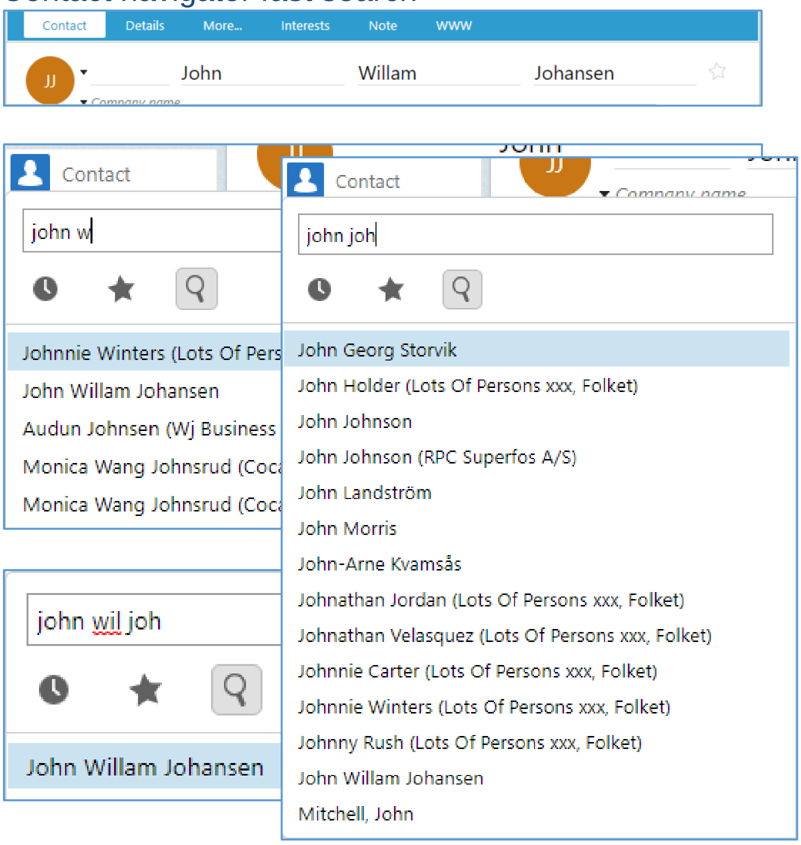
A new main panel for Contact are added to our family of main panels. The contact dialog is history and you can see a new navigation button for **Contact**.

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 fast search



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

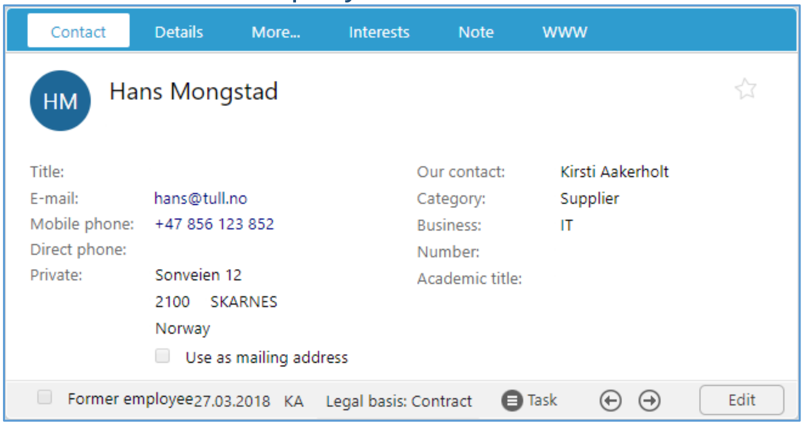
Ex. John William Johansen
You can search for both

- 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).

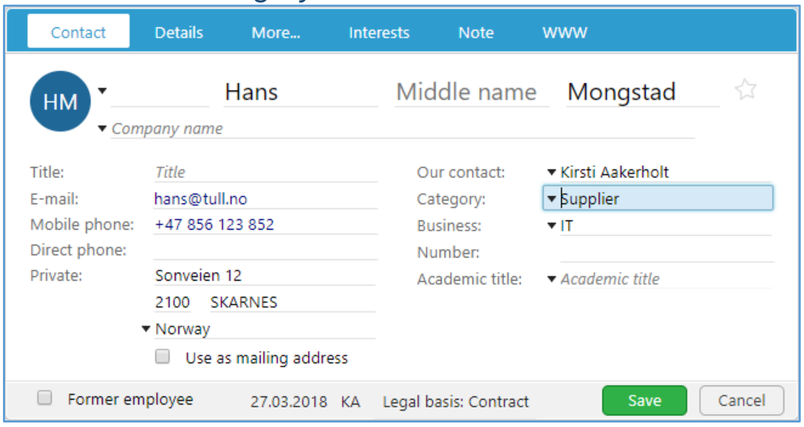
Contact without company



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



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.

New fields on contact linked to Service

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

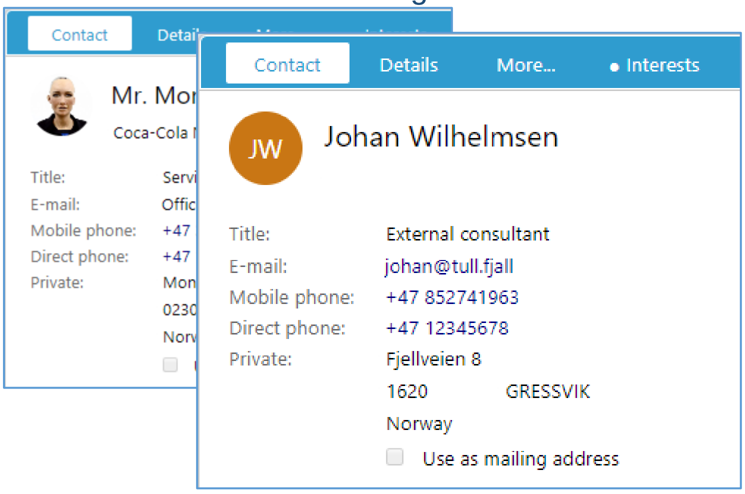
The fields are:

- 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).

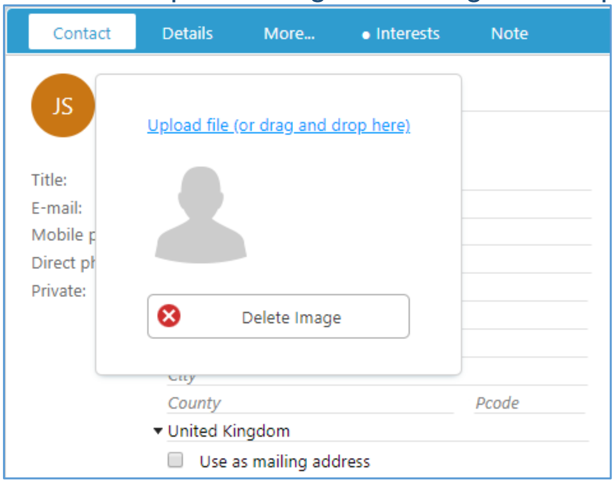
Contact with new default image



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

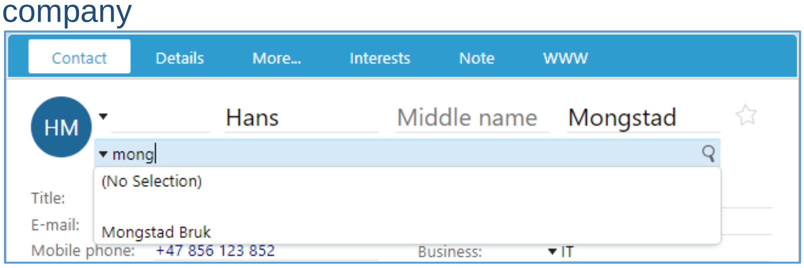


To upload a new contact image, you just go into Edit mode, click on the default image icon. You can **Upload file** or **Drag and drop** into the area.

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.

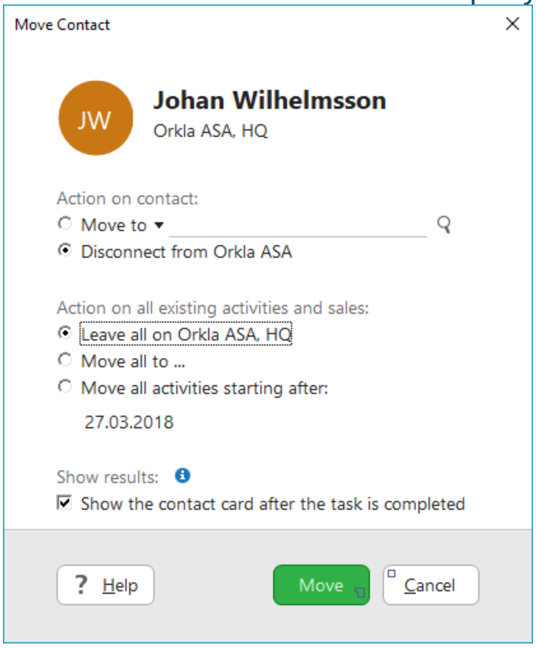
Move contact between companies or disconnect company



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.

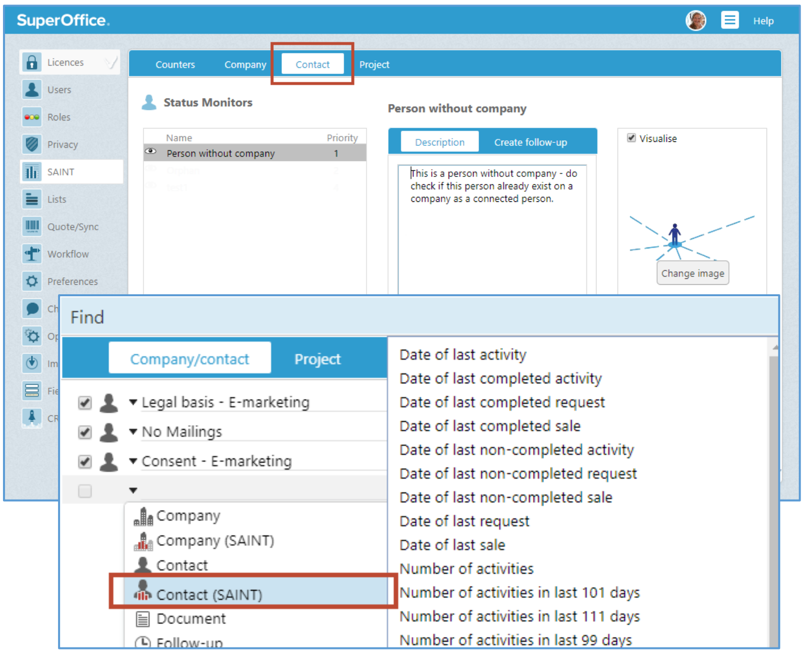
Disconnect a contact from a company with Move contact



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

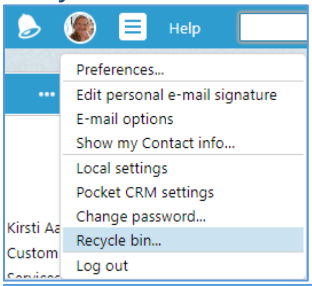


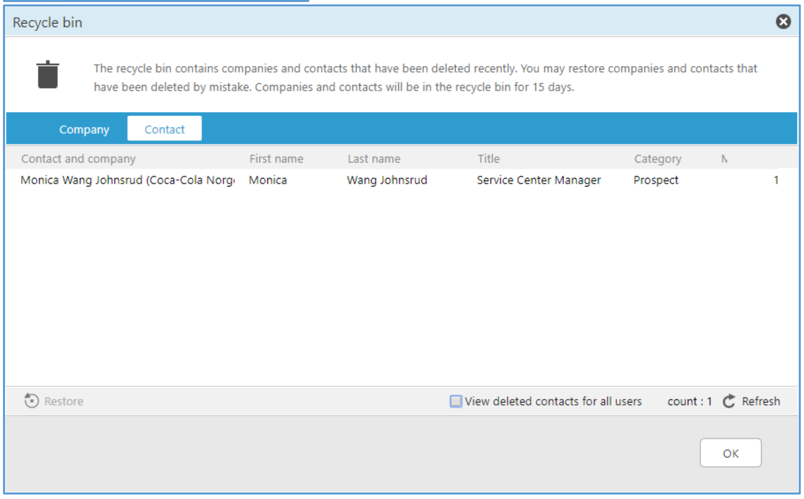
Contact have its own SAINT criteria and you have the possibility to add **SAINT monitors** for Contacts as well as Company and Projects.

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





From your **Personal settings** menu you can get to the **Recycle bin** and see all the deleted companies and contacts you have made.

The **Recycle bin** dialog shows one tab for **Company** and one for **Contacts**.

There is a check box **View deleted companies/contacts for all users** showing if you have the functional 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 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.

GDPR – Contact privacy report (8.3 – R02)

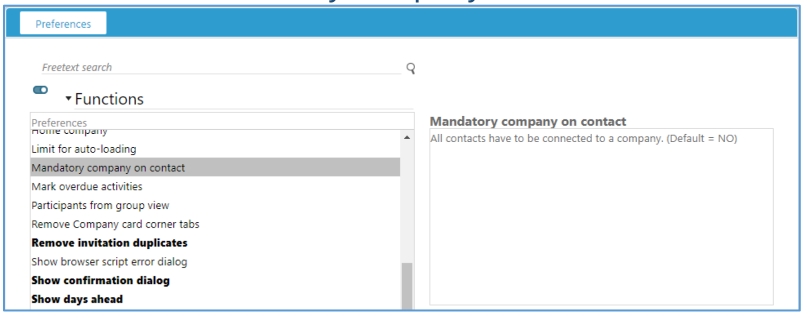
From the Task menu on the Contact screen you will find an option for **Generate personal data report**. (In Windows you will find it under: Contact file menu – BUT the feature is not released yet due to some technical problems.)

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 e-mail** 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.

News in Settings and maintenance

Preference – Mandatory company on contact

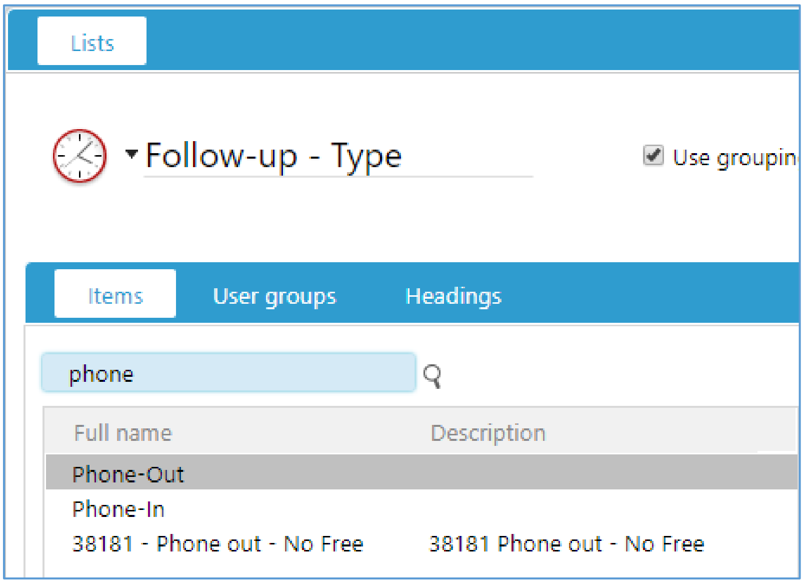


Some companies will have a policy that it’s not allowed to save persons without a company.

In **Preferences** on the **Function** section, a preference **Mandatory company on contact** is added.

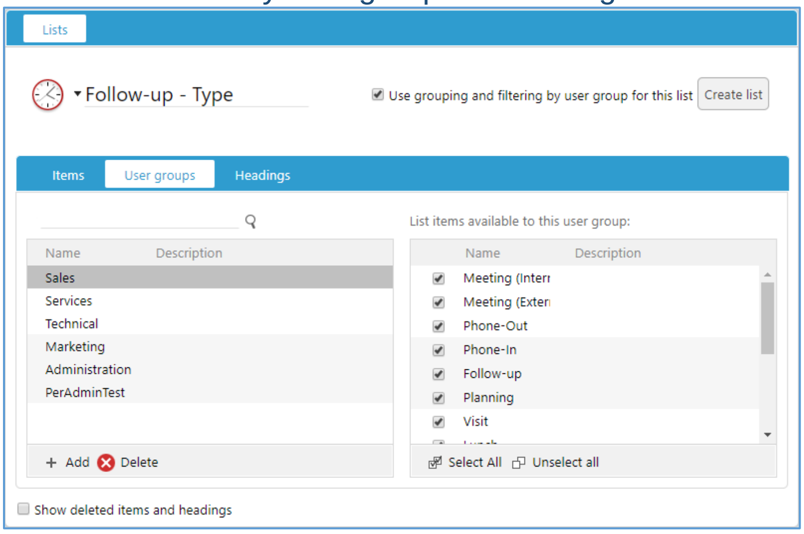
Setting it **ON** will always prompt to save a company with a new person.

Lists – Search for list items



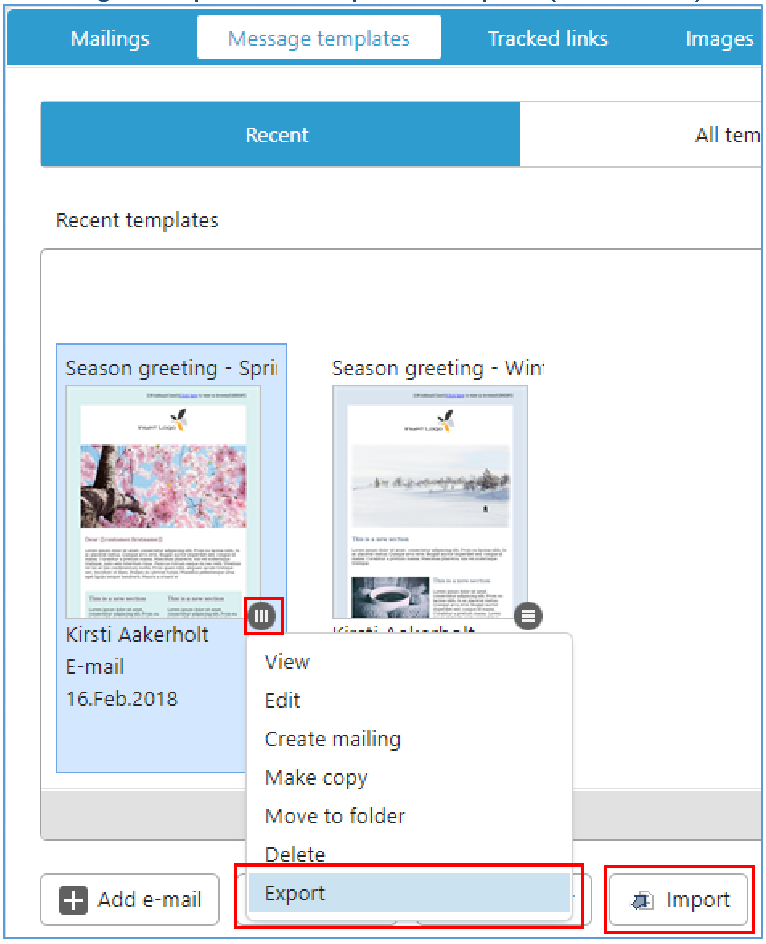
Some lists tend to be very long, and to quickly find the correct list item, if you know the name, is to search for it. The search result will be shown in the items list.

Lists – View lists by user groups or heading



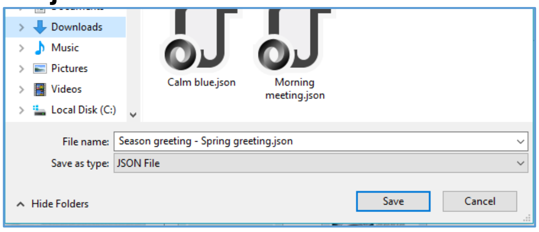
When you use grouping and filtering by user group, click the different tabs for **User groups** or **Headings** and there select wanted user group or heading and then check the different list items to be shown.

Message templates – Export & Import (8.3 – R03)

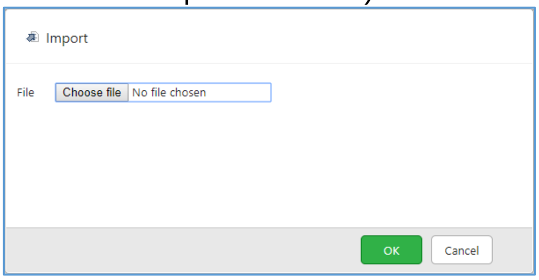


When you are working with mailing and message templates, you sometimes want to move a **message template** you are happy with.

To do so, it is now possible to **export** a message template, including images and links. Just click the menu button and select **Export**. A Save as dialog opens where you can select the folder to save the **json**-file.



To **import** a message template, just upload a json-file, that will include all images and links. Click the **Import** button and choose the wanted json-file in the dialog (you can also drag&drop from a Windows explorer window).

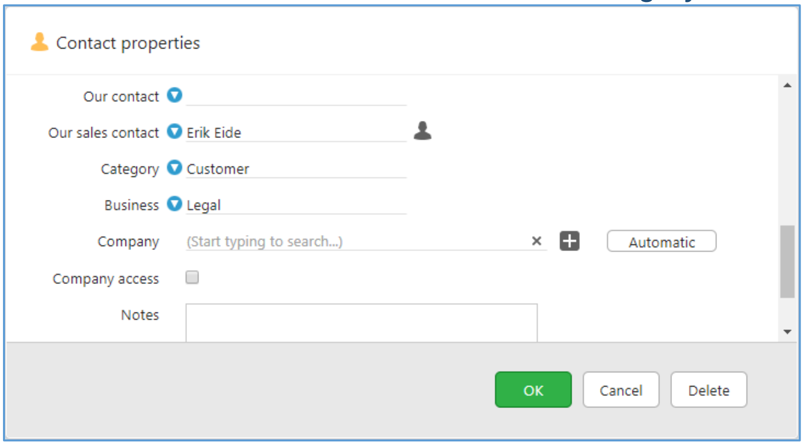


Images in the template are imported to **attachments**, but not created as External documents (i.e. shown under Images).

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.

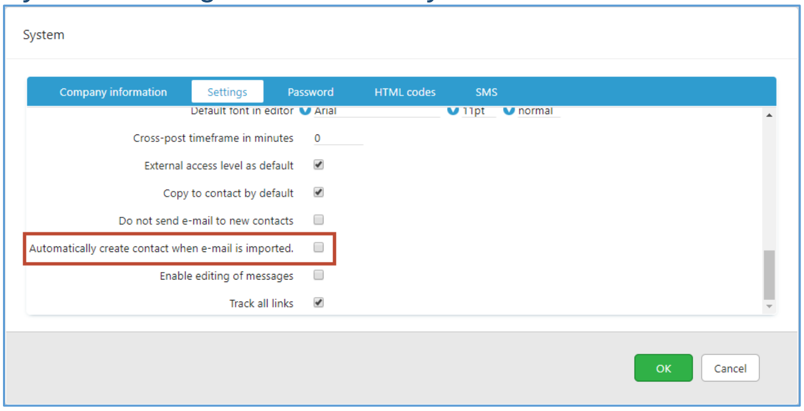
New and improved Service

Contact with Our contact, Business and Category



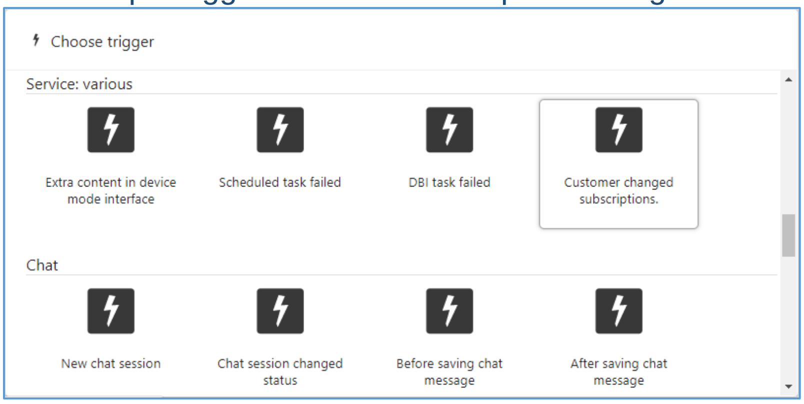
On the contact screen you can see the Sales contact, Category and Business fields. If the contact are linked to a company, it's the company values that shows in these fields.

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 e-mail 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.

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

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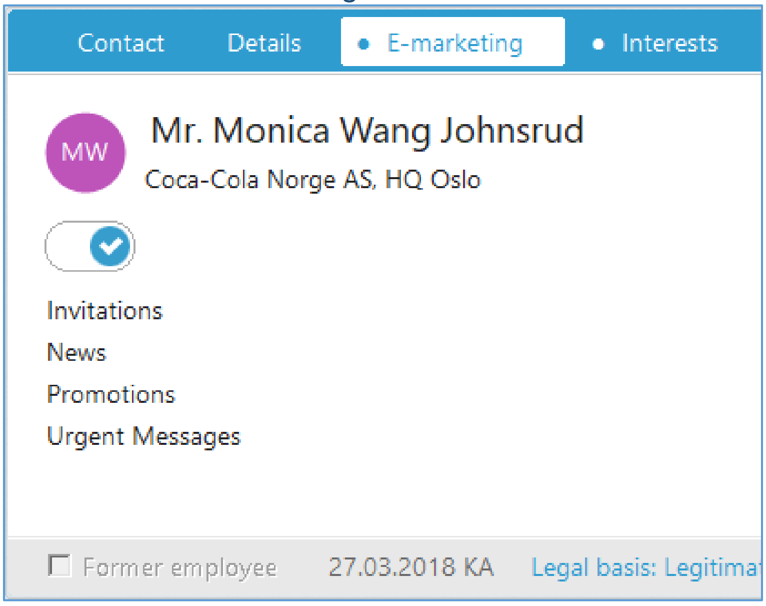
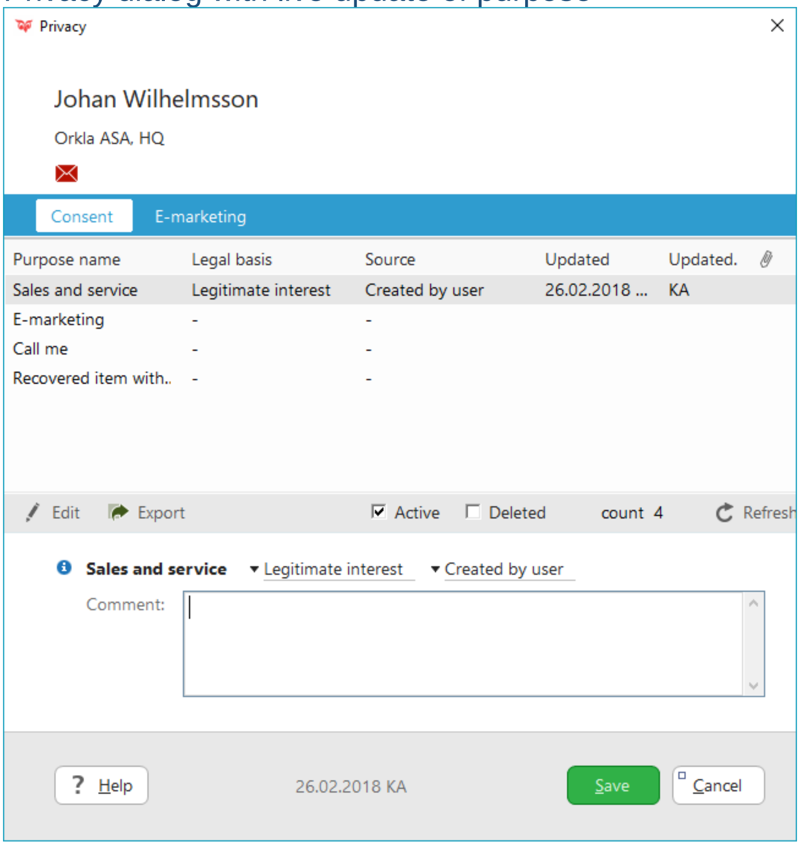
Contact with E-marketing tab



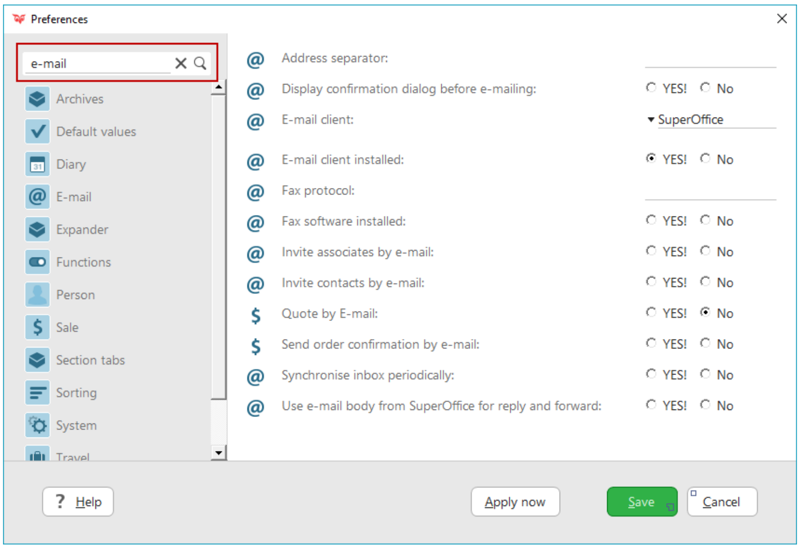
In the main panel of Contact, there is now a tab for **E-marketing**. In this tab you'll see if the consent for E-marketing is on or off, and also all the different **subscriptions**.

Privacy dialog with live update of purpose



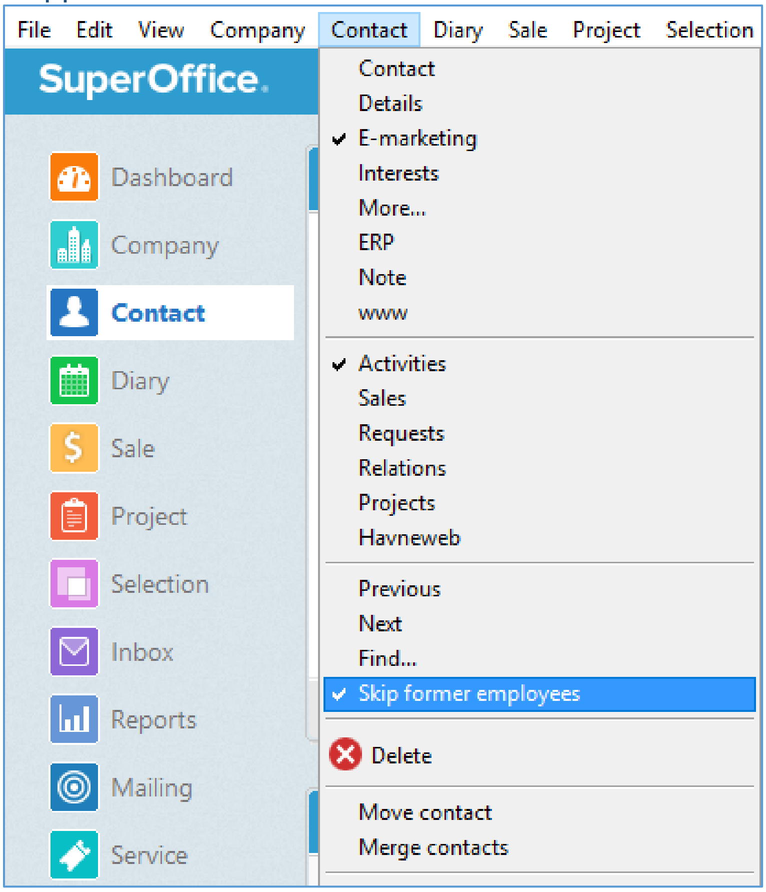
In the **Privacy** dialog you have the possibility to change the settings directly in the dialog, if you have the user rights.
You don't need to double click the purpose and change it in the **Edit legal basis** dialog, just change the purpose in the lower section of the **Privacy** dialog.

Preferences with search



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



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.

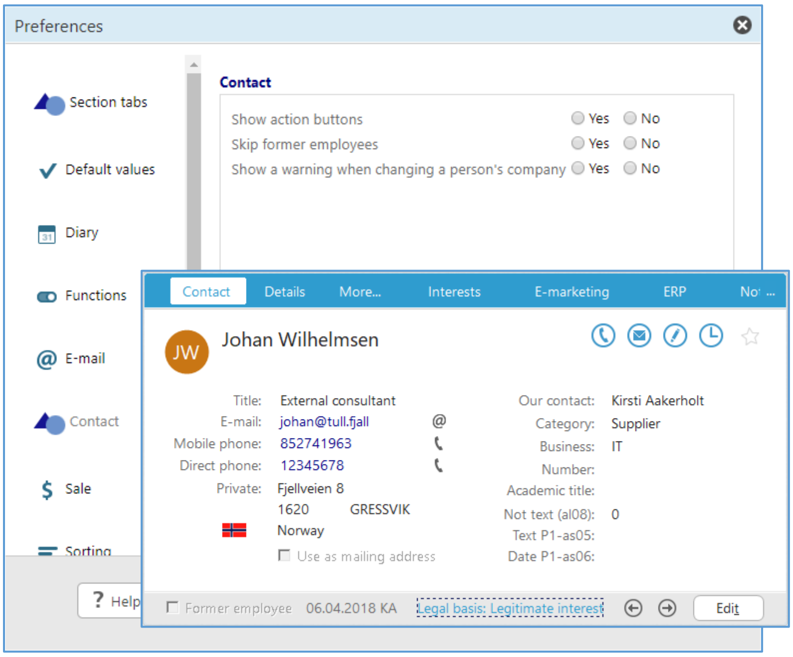
If you set the check to **ON** for the **Skip former employee**, when searching for contacts, no former employee will appear in the search result list. Same goes for using the stepper right/left, the stepper will skip former employees.

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.

Preference – Show action buttons on contact

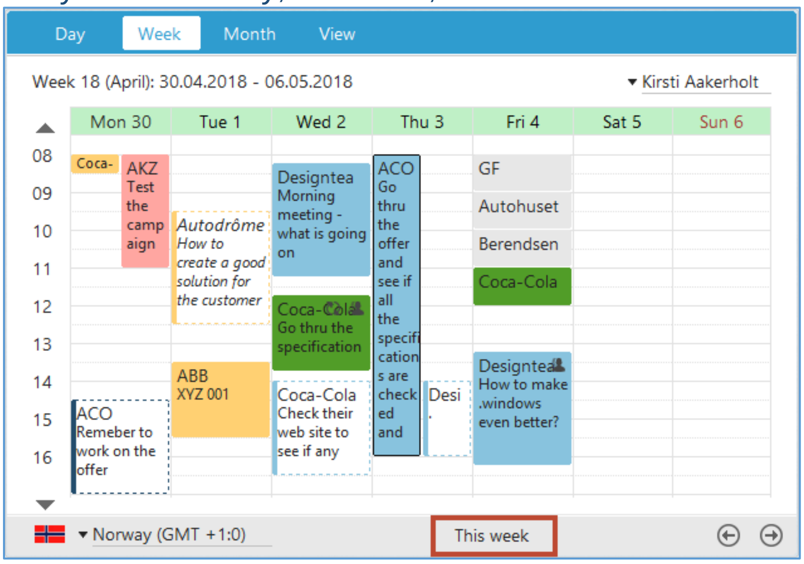


To be able to call, e-mail or add a task or an appointment, a set of action buttons was visible in the contact dialog. You can now decide to **Show action buttons** Yes or No.

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.

Diary – Go to today, this week, this month button

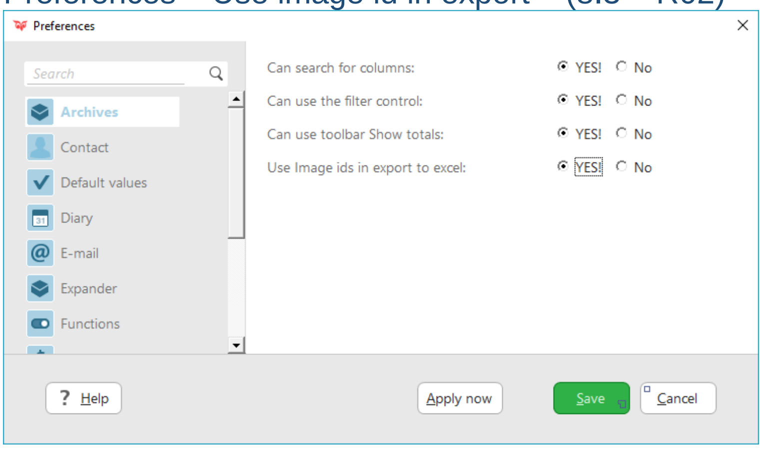


A button in the footer of all tabs on **Diary** have a button for **today**, **this week** and **this month**.

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.

Preferences – Use image id in export – (8.3 – R02)



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

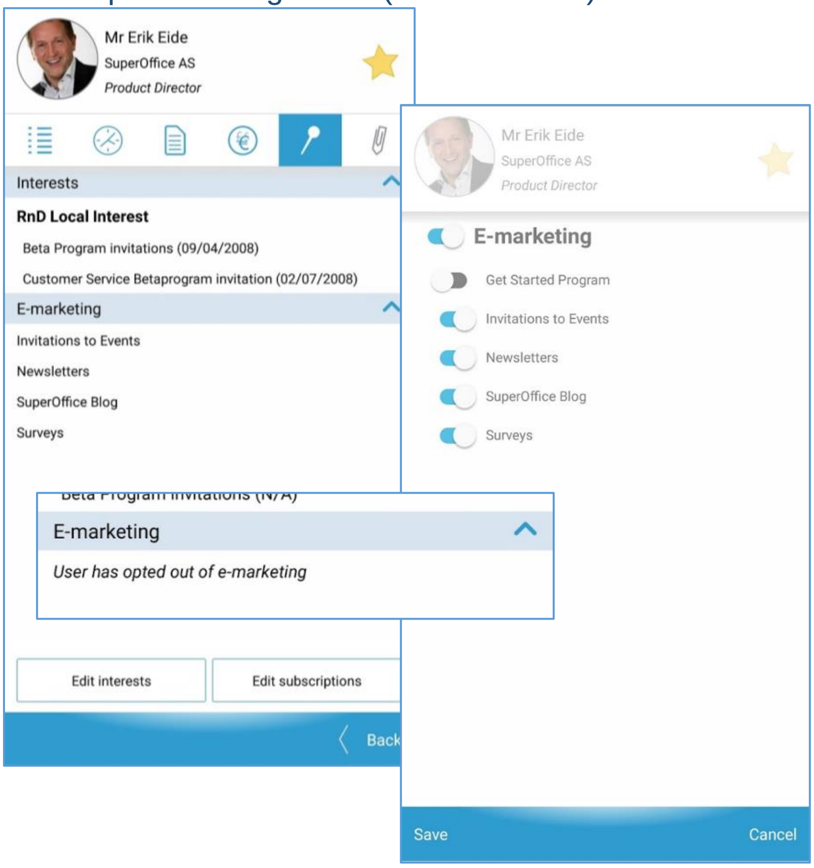
Default language is set to native phone language (8.0.57 - R039)

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 a 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)



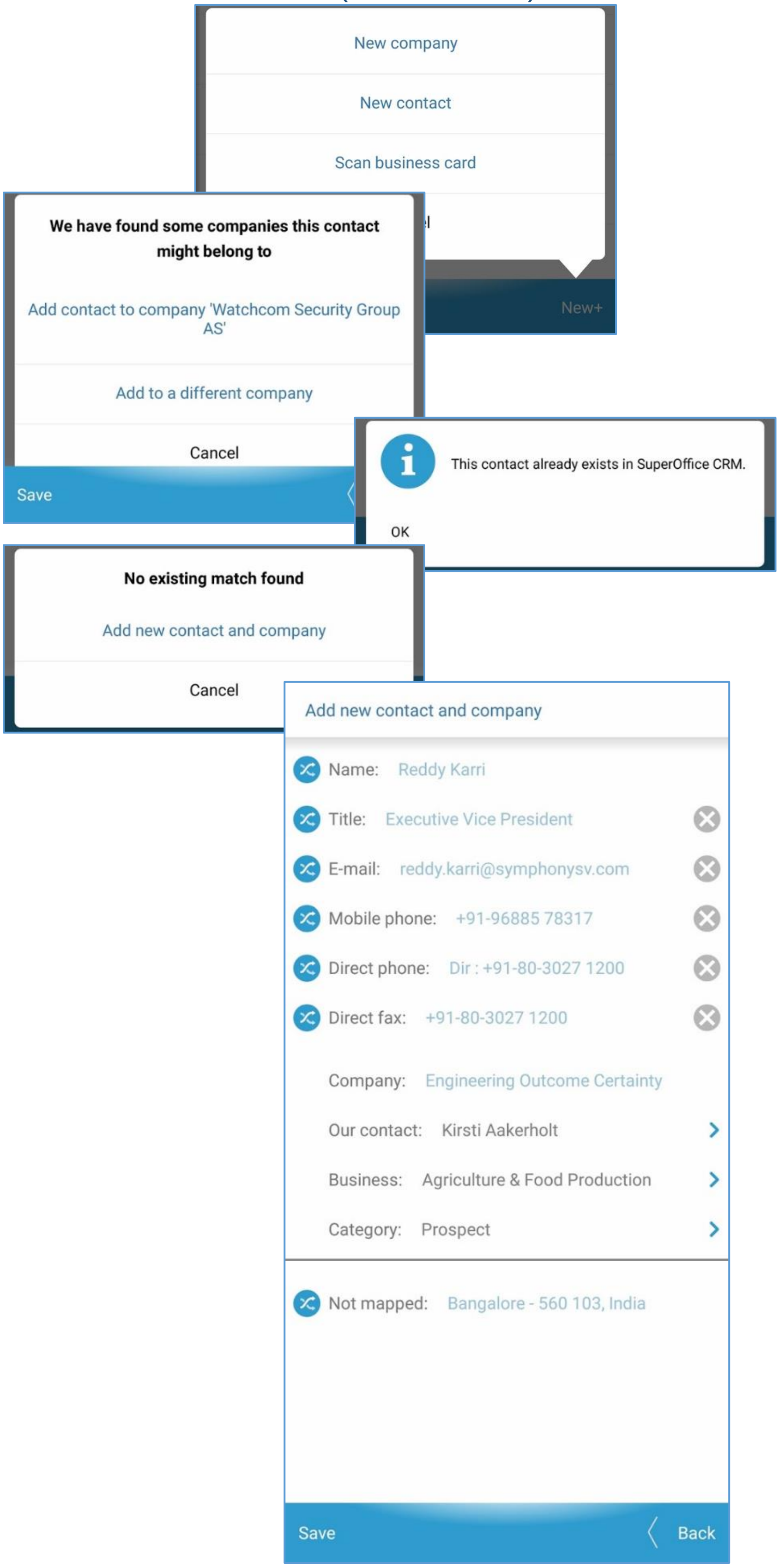
With the introduction of the **Subscription management**, a new section on Interest tab is added.

The first section contains of **Interests**, the last contains the **Subscription for consent on E-marketing**. Clicking the arrows will close the section and you have more room to see all the values on the other section.

Depending on the contact has said Yes or No to the to E-marketing consent, you will see the subscriptions or not.

If you're in a meeting with the person, you can easily go thru the different subscription types and select and unselect the wanted ones.

Scan business card (8.0.50 - R032)



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.

Dashboards (8.0.49 - R031)

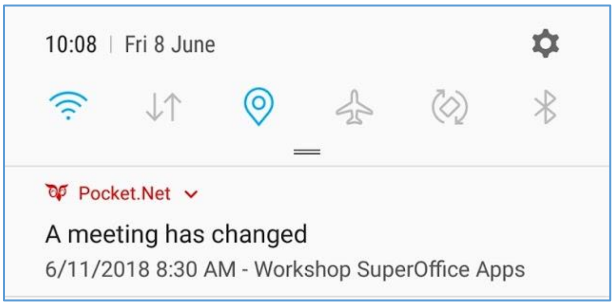
All existing tiles from the Dashboard in CRM will be available in Pocket, including the user defined tiles visible for you.

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)

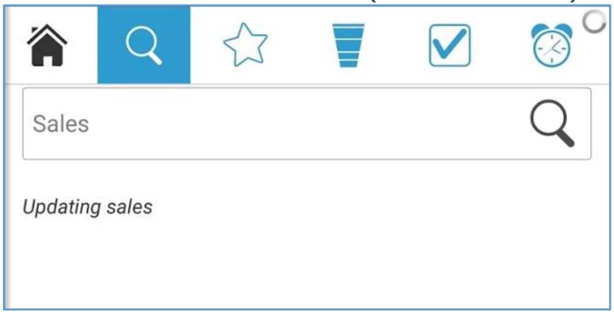


When you are invited to a meeting, or there is a change in a meeting you are attending, a small owl (**Hugo**) will appear in the **notification** area of your phone.

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.

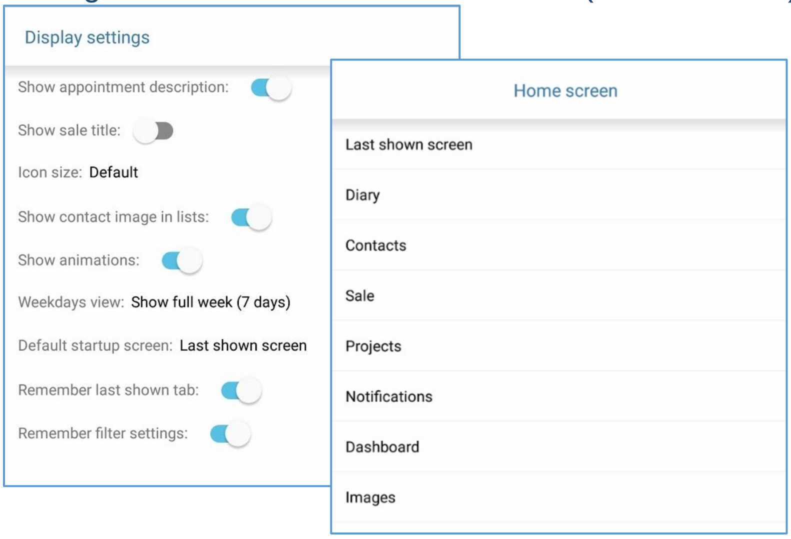
So easy and quick to get a warning of a new or changed meeting.

Sales with search screen (8.0.45 - R027)



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)



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.