

SuperOffice AS

What's new in SuperOffice 8.5

SuperOffice AS – Research and Development

Updated: December 18, 2020

Summary of Highlights

SuperOffice 8.5 – is the current major upgrade of the SuperOffice CRM platform.

Tags is a new main feature and is a powerful tool to search and group requests in SuperOffice Service.

You can set up tags in your system and tag any ticket with as many tags as you want. You are no longer limited to the standard categories. Using tags will simplify the way you save your requests and optimize your searching, listing and filtering capabilities.

For a more efficient tag system, and to avoid duplicate tags for the same request, the ability to add or delete tags will be a functional right set by the administrator.

The SuperOffice Service Customer Centre has also given been a major update with both a modernized out-of-the-box look and feel, and more importantly the ability to adjust the style to fit a company's own corporate identity without the knowledge of HTML coding.

One of the major new features released in SuperOffice 8.5 has been the ability to send and receive appointment invitations from people outside your organisation, i.e. those not using your SuperOffice Diary. The set of features associated with this makes managing your diary a whole lot easier and a lot more efficient than before.

Several of the main screens in Pocket CRM has been redesigned to offer an easier way to take action, whether that is to call, send a text, an e-mail, update a sale or make an appointment. The information presented have also been made more flexible with options for choosing what works for an individual user.

A final note! Google is launching a new version of their Chrome web browser. This new browser contains new and improved security measures that could affect the use of SuperOffice in combination with iframes, cookies for the chat widget and web forms you use on your websites. Make sure to upgrade to SuperOffice CRM R11 to make sure this new browser is supported by SuperOffice.

You can check all product releases for SuperOffice 8.4 [here](#).

New functions in the sub release of 8.5 are added to this document:

- 8.5 R01 Tag your requests
- 8.5 R02 Pocket CRM, Sales, Marketing, Service and Settings improvements
- 8.5 R03 Autosave, request preferences & CRM script triggers
- 8.5 R04 Extra Service field available in CRM and Google reCAPTCHA for forms
- 8.5 R05 Configuration of Service Customer Centre, new fields in forms
- 8.5 R06 iOS 13 updates, Service available in Russian and improved Bulk update
- 8.5 R07 Google Analytics for forms, Preview e-mail attachments and group Tags
- 8.5 R08 Extended e-mail domain validation for forms and chat
- 8.5 R09 New Company and Contact card for Pocket CRM
- 8.5 R10 New user management, new "main contact" field, and Ukrainian language.
- 8.5 R11 Incoming and outgoing invitations for internal and external people
- 8.5 R12 Manage service categories from Settings and maintenance
- 8.5 R13 New and improved User administration features
- 8.5 R14 New invitation feature in Mail link and improvements in Pocket CRM
- 8.5 R15
- 8.5 R15 Hotfix: For version of Chromium 86 and Edge 86
- 8.5 R16 Windows features, Chat security settings, security bugs on Web and Service

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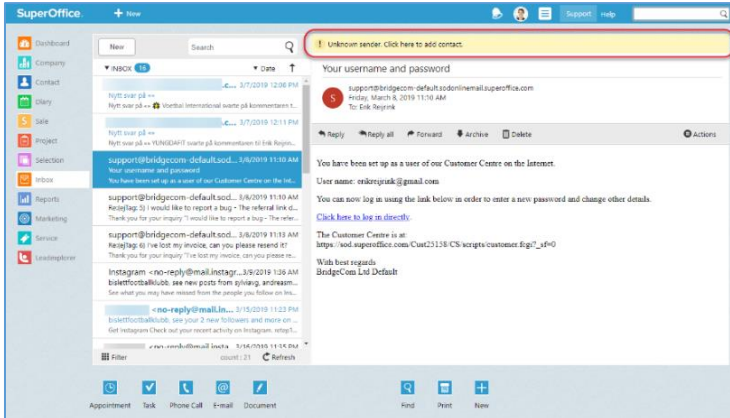
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New and improved Standard CRM

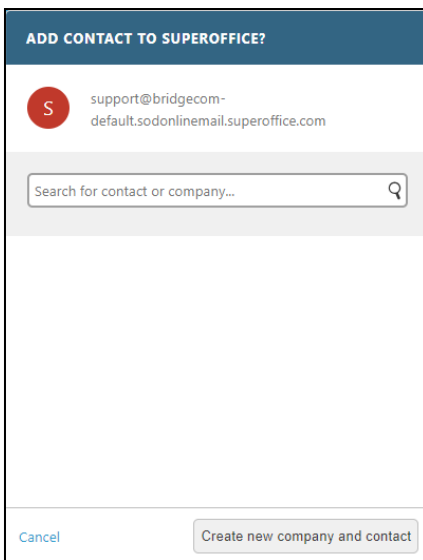
Inbox – New design of the “unknown person, do you want to add to SuperOffice” (8.5 R01)



When you use the integrated Inbox in SuperOffice CRM and you've received a new e-mail from an unknown e-mail address, a yellow banner will notify you that this person isn't registered in SuperOffice yet.

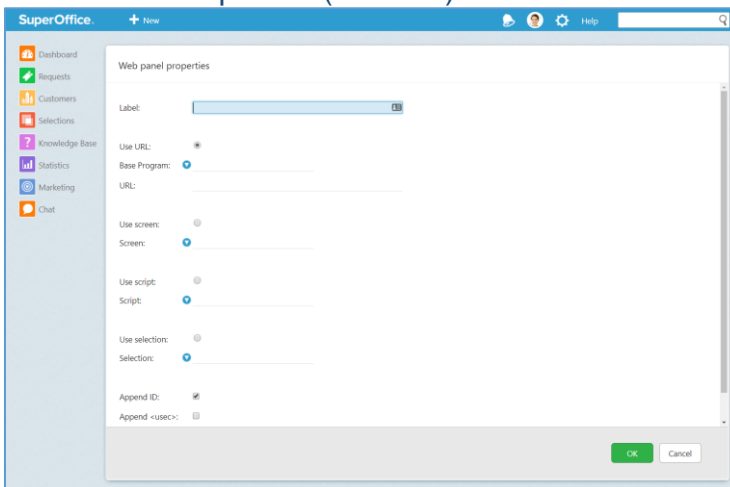
When you click the yellow banner a new dialog will open. Here you can add and save the contact's e-mail address on a new or existing contact card.

This feature is available from your web inbox, chat, forms, and request panels.



We've also added the title field here, so you can add Mr. and Ms. To your contacts.

CRM – View and edit the data in extra tables from Service in web panels (8.5 R02)



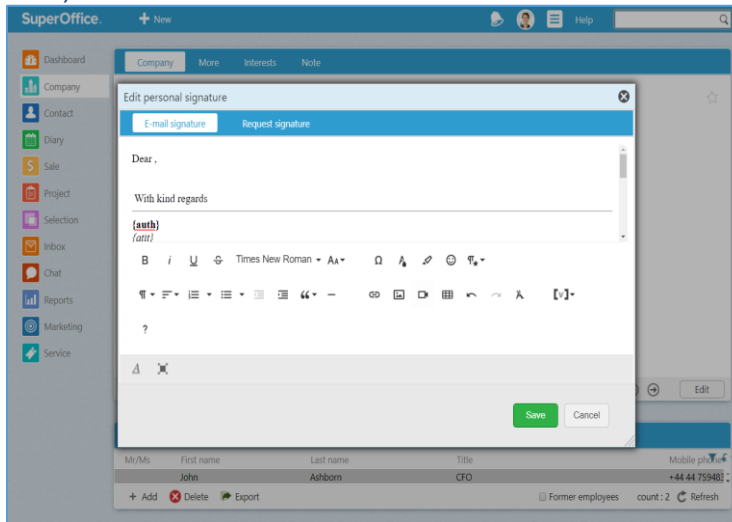
If you use SuperOffice Service and create extra tables and custom screens, these can now not only be viewed in web panels inside the interface for Sales and Marketing users, but users may also edit and enter data.

This ensures that user with new information can update directly and your data quality will improve.

It also increases the flexibility of what data you display to your CRM users by utilizing the possibilities of extra tables* and custom screens* available for SuperOffice Service.

(*Requires the additional Expander Services subscription).

CRM – Upgraded HTML editor to Froala 3.0 (8.5 R05)



The HTML editor in Settings and Maintenance have been upgraded to include the use of Froala 3.0.

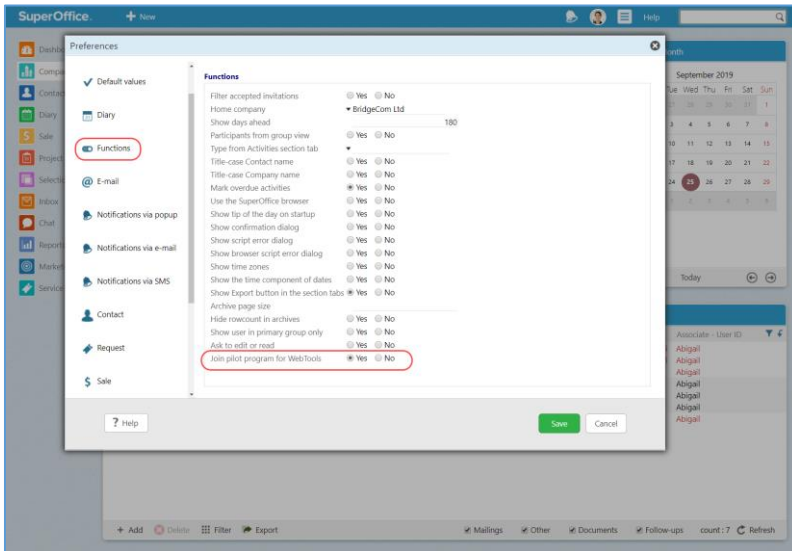
Froala is a rich text editor feature that is used in connection with:

- creating new e-mail templates in Settings & Maintenance,
- creating new e-mails via the SuperOffice Inbox
- creating double opt-in, thank you and inactive form pages,
- the editor used in connection with chat, and
- the editor used to create new e-mail signatures (not the e-mail signature inside a requests)*.

This upgrade ensures the latest features of this editor tool are available to users of SuperOffice.

*SuperOffice CRM uses a separate e-mail signature than the one linked to a request and the editor of the latter does not use Froala. The reason for having two e-mail signature is because a user most often do not want to provide all their personal contact details when replying to a request ticket.

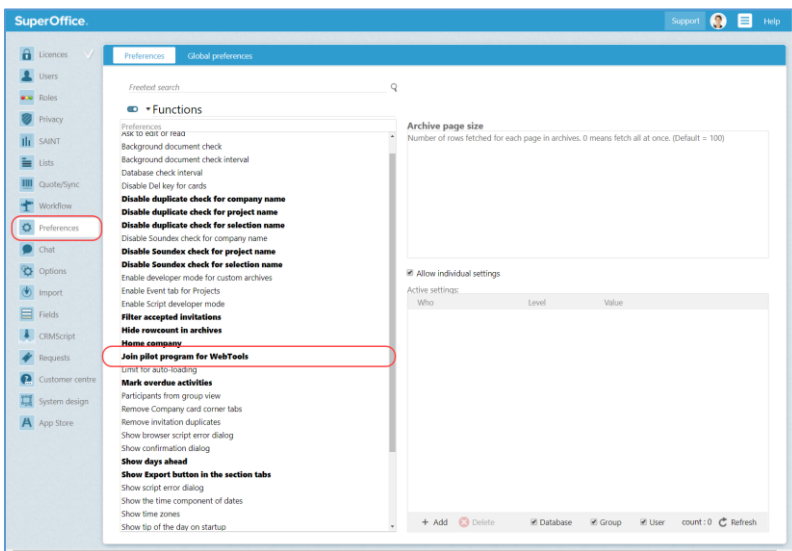
CRM – Sign up to be a pilot customer/user from Settings & Maintenance (8.5 R05)



Users who are interested in getting early access to new features can sign up to pilot programs directly from the **Preferences** tab in SuperOffice CRM. It is also possible for a company to sign up via Preferences inside Settings & Maintenance.

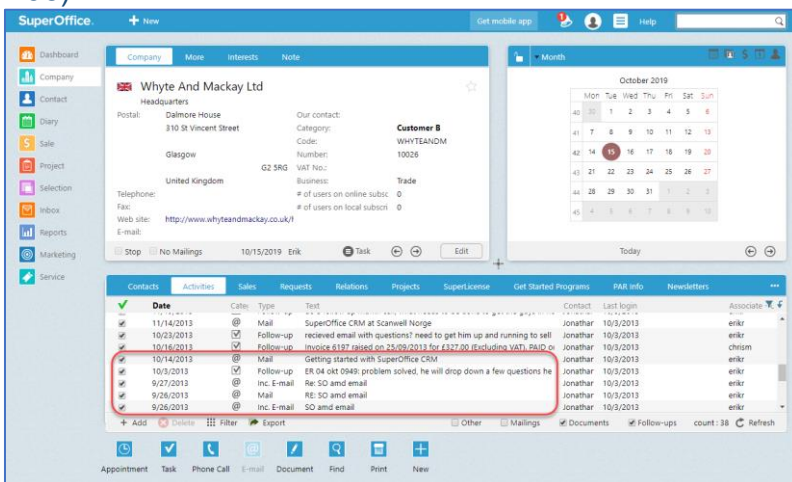
The current pilot programs running at any point in time are included as options under **Functions**.

When someone opts-in to a pilot program, they will gain early access to the new feature and be able to provide feedback and comments.



More information about all currently running pilot projects is available on the under the [Community Product Release](#) page.

CRM – Open old SOM e-mails to read their content (8.5 R06)



For many years SuperOffice CRM used SOM files to save e-mails. Later MSG files replaced SOM and is the standard for all mails now.

However, this change meant that it wasn't possible for customers who migrated to SuperOffice CRM Online to open old e-mails based on the old SOM file format.

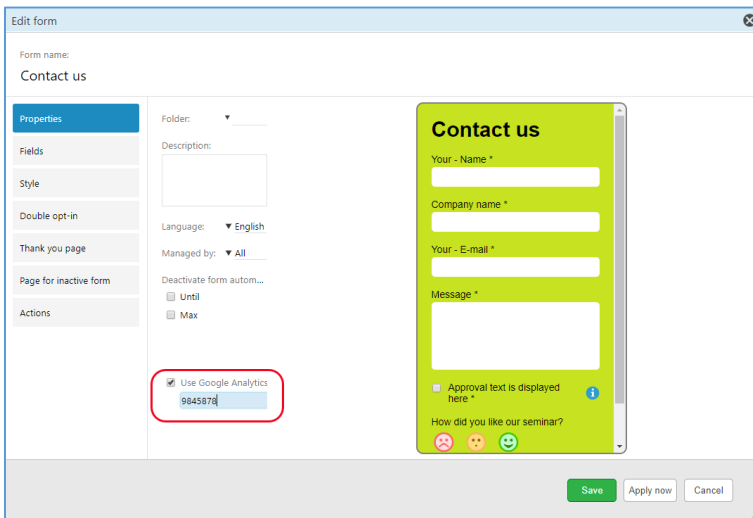
This has been addressed so that it is possible to open and read all e-mails saved in your database, it is now possible again to open SOM files in SuperOffice CRM.

CRM – Track your web forms with Google Analytics (8.5 R07)

To analyse the effectiveness of your web forms, you can now track them using Google Analytics.

To do so, just activate and add the Google tag name you want to identify track form submissions by.

By analysing the performance of your webforms you can improve the fields and details on your web forms to increase the number of conversions.



The screenshot shows the 'Edit form' window for a form titled 'Contact us'. On the left, there are tabs for Properties, Fields, Style, Double opt-in, Thank you page, Page for inactive form, and Actions. The 'Use Google Analytics' checkbox is checked and highlighted with a red box, with the tracking ID '9845878' entered in the field below it. The form preview on the right shows a green form with fields for 'Your - Name *', 'Company name *', 'Your - E-mail *', and a 'Message *' text area. There are also options for 'Approval text is displayed here *' and a feedback section 'How did you like our seminar?' with three smiley face icons.

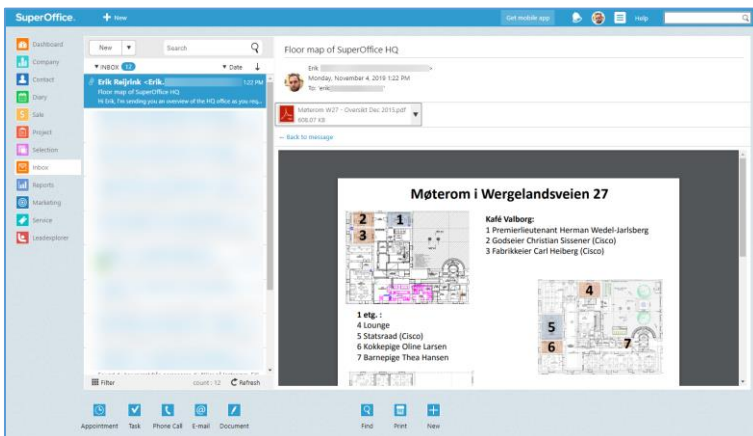
CRM – Preview e-mail attachments from the SuperOffice inbox (8.5 R07)

When you receive an e-mail with an attachment, it's a huge benefit if you can see the content of the document without having to open it completely. A preview saves time and reduces the need to open Word or Adobe reader.

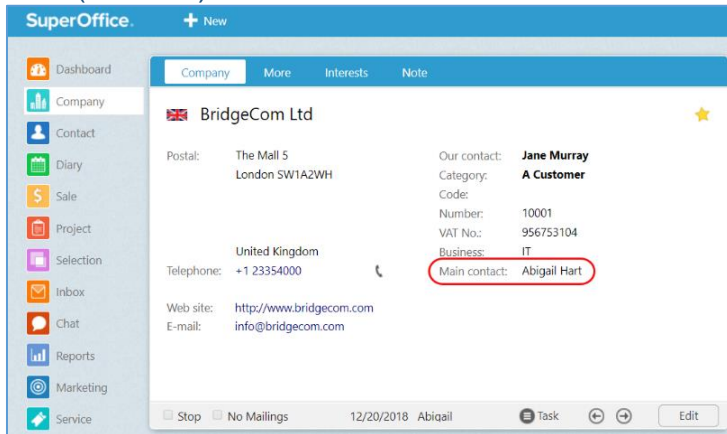
In the built-in inbox you can preview all Word, PDF, JPEG and PNG files to see the content of the document.

PowerPoint and Excel are not yet supported.

With the e-mail attachment preview feature, you'll have access to valuable information faster.



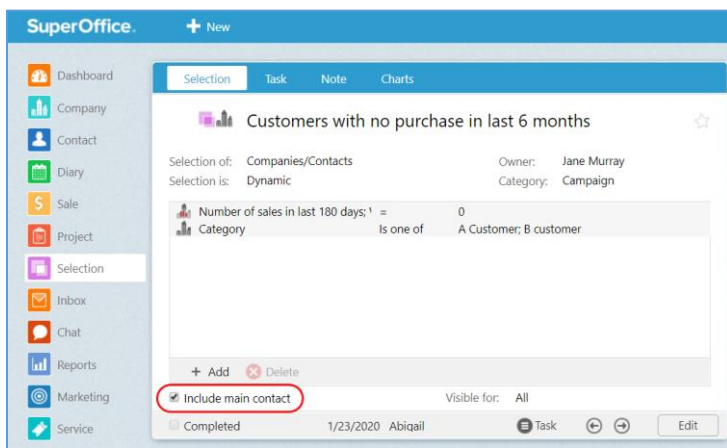
CRM – New field for “Main Contact” on Company card (8.5 R10)



A new field is added to the Company card called **Main contact**.

This field makes it easy to see who your main contact is when first looking at a Company card.

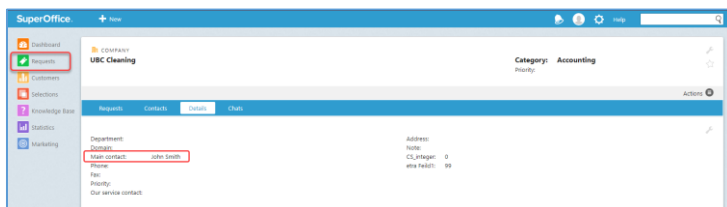
This field also replaces the Rank 1 contact and its role in mailings. So when you create a new or refresh an existing selection, you can select the checkbox **Include main contact** to add the main contact of each company to the selection results.



For existing company cards, the contact with Rank 1 today will automatically be displayed as Main contact.

This field also replaces the **Primary Contact** field in SuperOffice Service. If you use the Primary contact field today, the label will change but the current data for Service will remain and the name for primary contact will not be replaced with the name ranked as 1 in the standard interface.

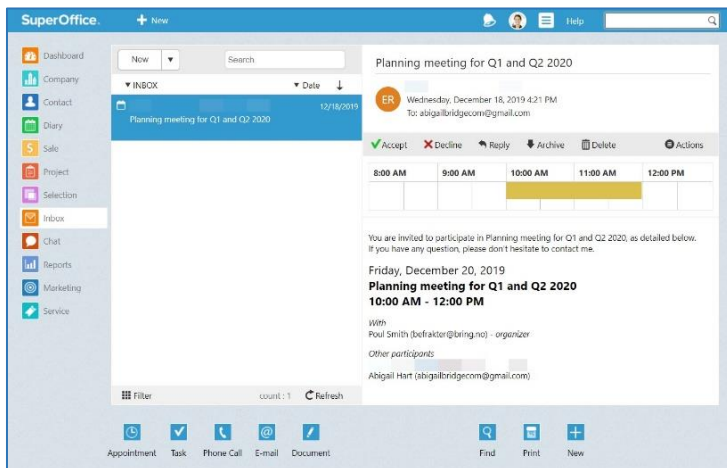
On new companies, the first person added will automatically be set as Main contact.



If the Main contact is marked as Former employee or deleted, the person with lowest rank will then automatically be set as the 'main contact'. This way there is always a Main contact.

You can manually change the contact registered here by clicking the **Edit** button. A drop-down list with all available contacts registered on the company card will appear.

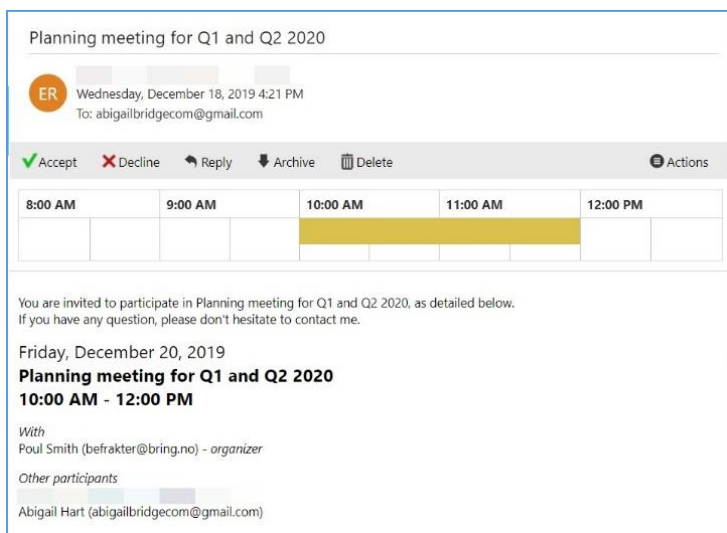
CRM – Send and receive e-mail invitations from SuperOffice CRM (8.5 R11)



Send and receive e-mail invitations to invite people inside and outside of your organisation to meetings and to accept and decline proposed meetings from external people.

These new set of features makes managing your diary a whole lot easier.

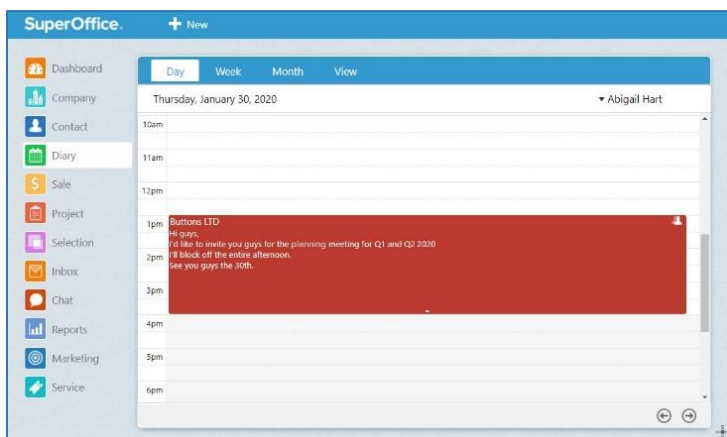
Note: The following features only applies when you receive invitations in your inbox or create new appointments involving people not using your SuperOffice CRM diary. When you **only invite colleagues using SuperOffice CRM** to a meeting, SuperOffice will, by default, never send out an e-mail invitation.



When you **receive a meeting invitation from an external contact** (i.e. someone outside your organisation), you can accept their invitation to save the meeting details in your SuperOffice Diary. Until the moment you accept or decline the invitation, it will be saved in your diary as a *tentative* appointment.

Inside your SuperOffice inbox, you can also see an preview of your diary on the day of the appointment, so you can easily see if you are available for the meeting or not.

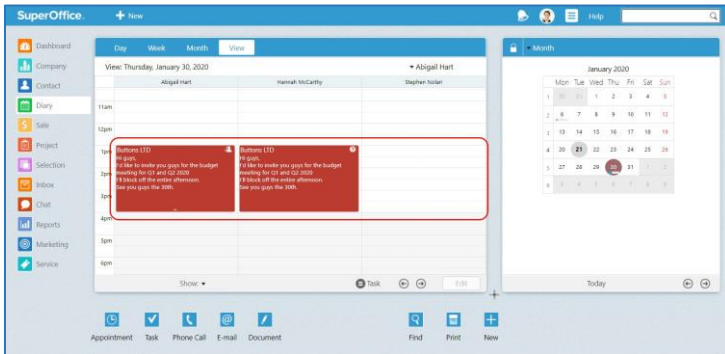
When you **receive an invitation from an unknown person** (i.e. somebody who isn't registered in SuperOffice or who is registered multiple times) the meeting will *not* be visible in your diary as a tentative appointment.



You are however able to accept this invitation and save the meeting without a company and contact. In this instance, SuperOffice will save a standard text on the activity including the name of the organizer. On the appointment SuperOffice saves the date, time and location.

A new e-mail invitation will show up in SuperOffice as:
a tentative appointment in your Diary
an e-mail in your web inbox
a notification in the Invitations dialogue

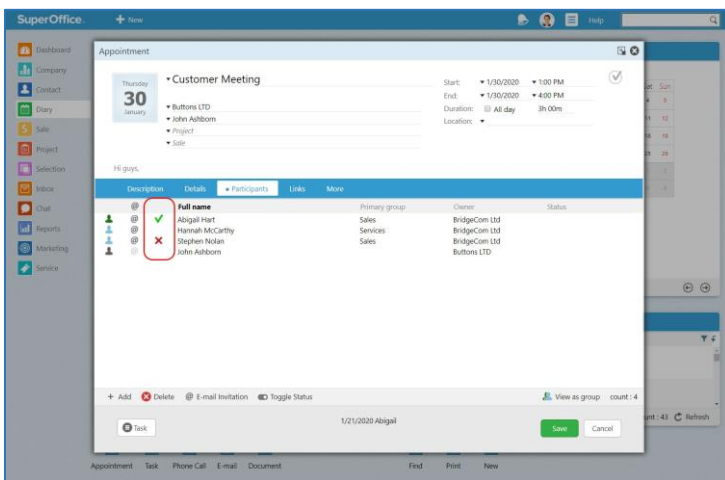
Some **e-mail invitations contain an attachment**. If you wish to save the



attachment, it's important to save the attachment *before* you accept the invitation. Once you've accepted or declined the invitation, the e-mail will be removed from your inbox.

Sometimes **multiple internal people are invited to the same meeting by the external contact**. If one of the internal meeting participants has configured SuperOffice e-mail by either Outlook maillink or the web inbox, *all internal participants* will be added to the appointment in SuperOffice and the appointment will appear in all the internal participants diary.

If the person who invites you to the meeting is unknown to SuperOffice, however, only the person who accepts the appointment will see the meeting in their diary. The other participants who use SuperOffice, will not see the appointment in their SuperOffice diary. They only see the e-mail invitation in their inbox.



You can also **send out meeting invitations to people outside your organisation**. In the appointment, on the participants tab you can see the status of the invitation. When the status shows:

- Blank, the contact has not replied to the invitation,
- A green check, the contact has accepted the invitation,
- A red cross, the contact has declined the invitation, or
- An eye, the external contact has answered tentatively.

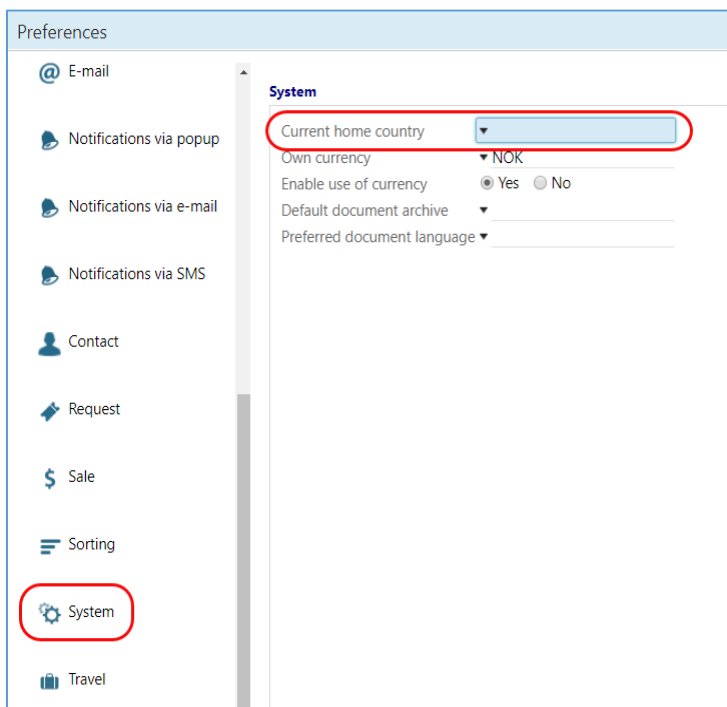
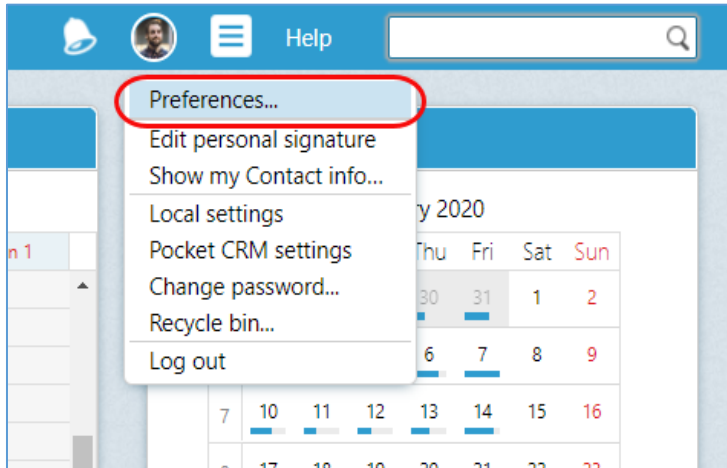
Note: There are new Preference settings for e-mail invitations available in Settings and Maintenance and options for adding e-mail templates. See below for more details.

Please also note, if you are already synchronizing your Diary with the Outlook calendar using either Synchronizer for SuperOffice or Exchange Synchronizer, then this new feature will automatically be adjusted to avoid duplication. Specifically, the reply buttons in the Inbox will be disabled for incoming invitations, and tentative appointments will not be created in the Diary.

As soon as a participant to a meeting replies, the attendance status of that participant will change from blank to one of the other three options within the appointment.

E-mail invitations is supported for all platforms of SuperOffice CRM. The feature is rolled out gradually, so if you do not have access to it yet, you'll get access to it soon.

CRM – Red letter days (8.5 R11)



A new set of red letter days (holidays and other traditional celebrations) have been added.

You'll have access to all red letter days for:

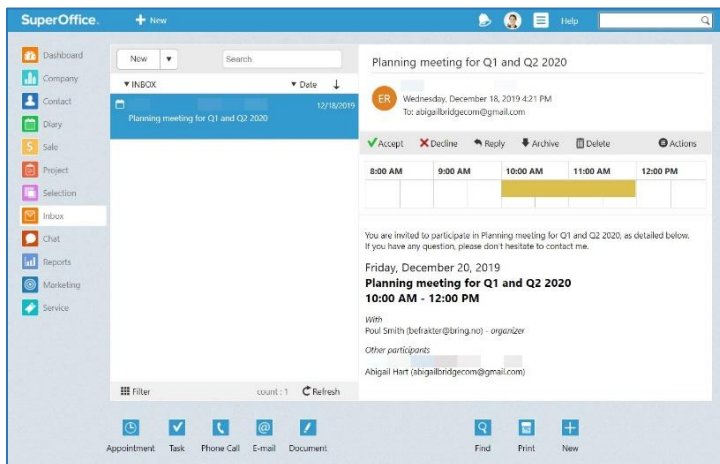
Belgium (BE) (Dutch)
Sri Lanka (SL) (English)
Czechia (CZ)
Denmark (DA)
Finland (FI)
Germany (DE)
Lithuania (LT)
Netherlands (the) (NL)
Norway (NO)
Russian Federation (the) (RU)
Spain (SP)
Sweden (SE)
Switzerland (CH) (German)
United Kingdom of Great Britain and Northern Ireland (the) (UK)
United States of America (the) (US)

In addition we've added the red letter days for 8 "new" countries:

Austria (AT) (German)
China (CN)
France (FR)
Ireland (IE)
Italy (IT)
Japan (JP)
Poland (PL)
Ukraine (UA)

To select the country you want to see the holidays and celebration days for, you can go to the **personal menu** in SuperOffice CRM, then choose **Preferences – System – Home country**. From this list you can choose any country in the world as your home country, however we only provide the red letter days for the countries mentioned above.

CRM – Send and receive e-mail invitations from external people (8.5 R14)



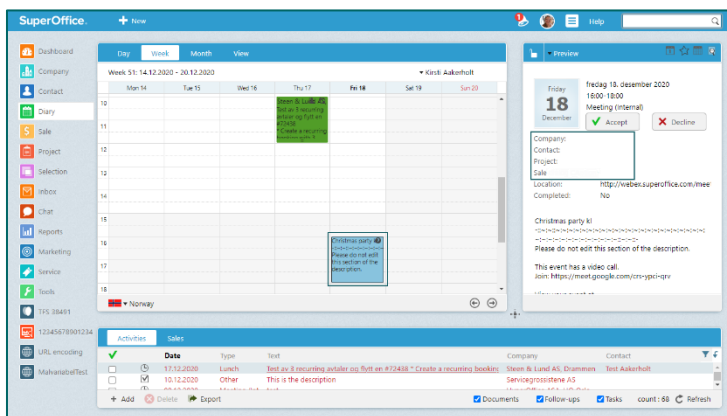
Earlier this year we introduced the functionality to send and receive e-mail invitations from people inside your organisation.

With SuperOffice 8.5 R14, you can send and receive e-mail invitations to invite external people to meetings and to accept and decline proposed meetings from external people.

These new set of features makes managing your diary easier.

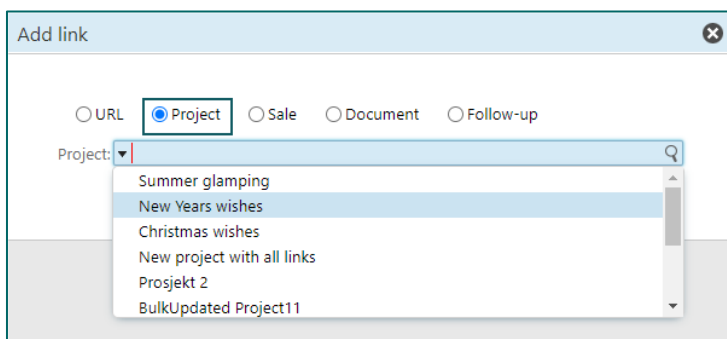
To learn more about how to send and receive e-mail invitations go to CRM – Send and receive e-mail invitations form external people (8.5 R11) which you can find just above this section.

Appointment – Invitation fixes (8.5 R16)



For external invitation where the sender is not found, the invitation will show in the diary as tentative booking. Only the associate will get the booking, not all participants.

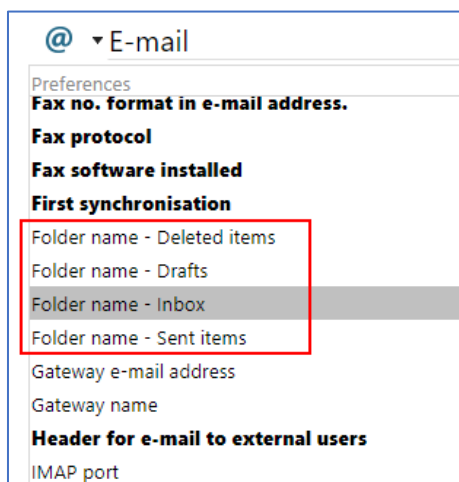
Appointment & Document – Link for Add project (8.5 R16)



You can add links for Project in both the Appointment and Document dialog.

It means you can add links both from the appointment and document dialogs and from the project main card.

Inbox – Possible to set other default folders (8.5 R16)



@ ▾ E-mail

Preferences

Fax no. format in e-mail address.

Fax protocol

Fax software installed

First synchronisation

Folder name - Deleted items

Folder name - Drafts

Folder name - **Inbox**

Folder name - Sent items

Gateway e-mail address

Gateway name

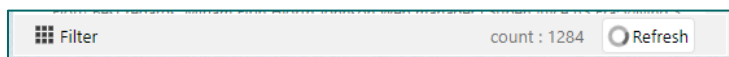
Header for e-mail to external users

IMAP port

When you want to select other folders than the default folder for Inbox, Sent items, Drafts and Deleted items, you can do so in the Preferences in the Settings and maintenance.

For companies that use a specific setup for the different folders, this is possible to change for all, selected groups or users.

Inbox – Automatic refresh of the inbox folders (8.5 R16)



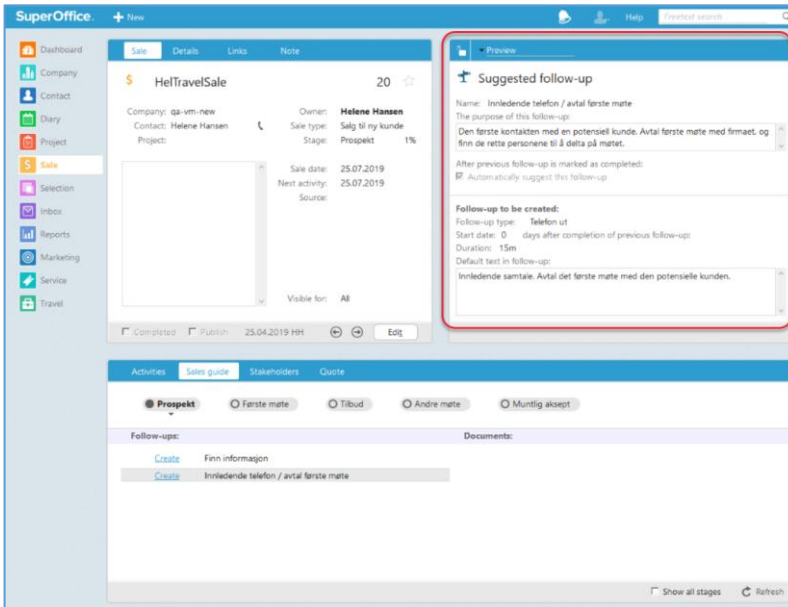
Filter count : 1284 Refresh

When you log into your Inbox, all e-mails are loading. When continuing to use the inbox clicking the Refresh button will load all new e-mails and are visible for the user.

New and improved Windows client

There will always be some differences in the Windows and Web client. Some features are to be found in Web and some only in the Windows client. See below for Windows changes.

Mini card – Preview documents and activities in the mini panel (8.5 R01)



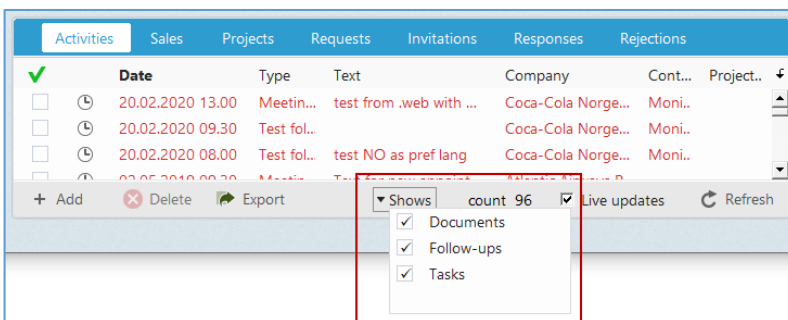
Finding the information, you need quickly can be hard if your Sales or Project guide is full of appointments, meetings and documents.

To make it easier and to save you time when searching for a particular document, you can preview the content of all your documents and activities inside the mini panel.

This way you don't have to open all documents or activities to see the content. Instead, you can check the mini panel while skipping and scanning through the information you've saved on them.

Save time by scanning information on documents and activities in the mini panel.

Activity archives – The Show drop-down menu (8.5 R11)



As a user, you control which records are visible in your activity archives by selecting documents, follow-ups, and/or tasks in the **Shows** menu.

In the Shows drop-down menu you can check which records you wish to see.

When you hover over the **Shows** button you'll see what filters you've selected.

Diary – Archives for Projects and Requests (8.5 R11)

Activities		Sales		Projects	Requests			
ID	Status	Title	Category	Custom...	Last changed	Created	Owner	
22	Open	Hel exte...	Account...	Helene...	31.08.2019 08.17	21.10.2015 09.43	KA	
33	Postpo...	Laboru...	Support	Gisle St...	22.10.2015 10.02	21.06.2015 22.48	KA	
35	Open	Sint qu...	Support	Klaus ...	15.06.2016 15.38	30.09.2014 12.02	KA	
36	In queue	Ad occa...	Account...	Jarmo N.	04.01.2017 13.54	30.09.2014 15.36	KA	
41	Open	Fugiat ...	Account...	Kirsa Ch...	03.12.2015 13.06	04.05.2015 08.48	KA	
44	Closed	Officia ..	Account...	Bo Eric...	15.06.2016 14.37	29.11.2014 13.40	KA	
58	Open	Problem.	Support	Monica...	06.01.2017 14.47	06.01.2017 14.47	KA	
66	Open	I have s...	Support	Monica...	11.05.2017 14.20	11.05.2017 14.20	KA	
67	Open	Could l...	Support	Monica...	14.09.2017 10.22	11.05.2017 15.15	KA	

Export Merged Closed count 9 Live updates Refresh

In your **Diary**, you have access to the tabs for **Projects** and **Requests**.

The **Projects** archive shows all the projects you are responsible for, and the **Requests** archive shows requests owned by you.

You can easily check the status of the projects and requests you are working on.

Guides – Drag & drop documents on Project and Sales (8.5 R11)

Project Members Activities Sales Project guide

Planned In Progress Closing Completed

Follow-ups:

- Create Create project member list
- Create Find location
- Create Create invitation
- Create Send invitation
- Create Rig conference
- Create The Conference

Documents:

Create Conference invitation

Created only Milestones only Show all statuses

You can drag and drop documents into both your Project and Sales guide to add and use them.

This way you can easily add external documents and proposals you've been working on to your sales and project guide.

Navigator – Collapse navigator to only show buttons (8.5 R16)

SuperOffice. SuperOffice.

Dashboard Company Contact Diary Sale Project

Day Week 51

09 10 11 12

Company by Week Month

Week 51 (December): 14.12.2020 - 2

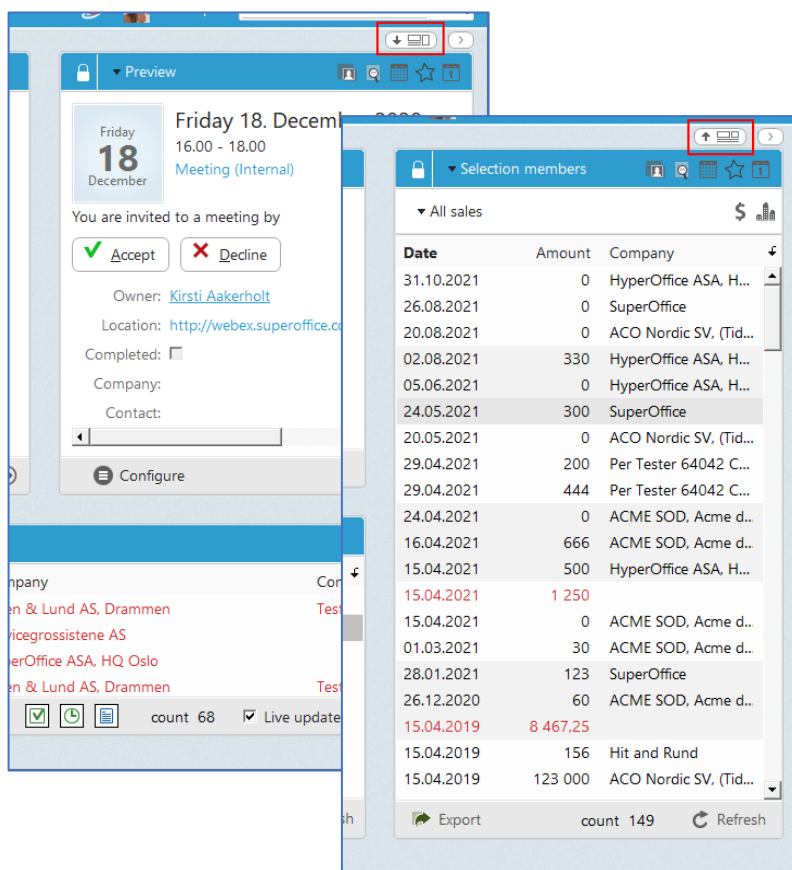
[Search]

Often you want more space for the archives and the main cards.

By clicking on the collapse of the navigator text, you just see the buttons of the different main panels.

The same functionality hides behind the menu, so you still have access to the history, fast search and selector.

Mini panel vs Side panel – Show Mini panel on whole right section (8.5 R16)

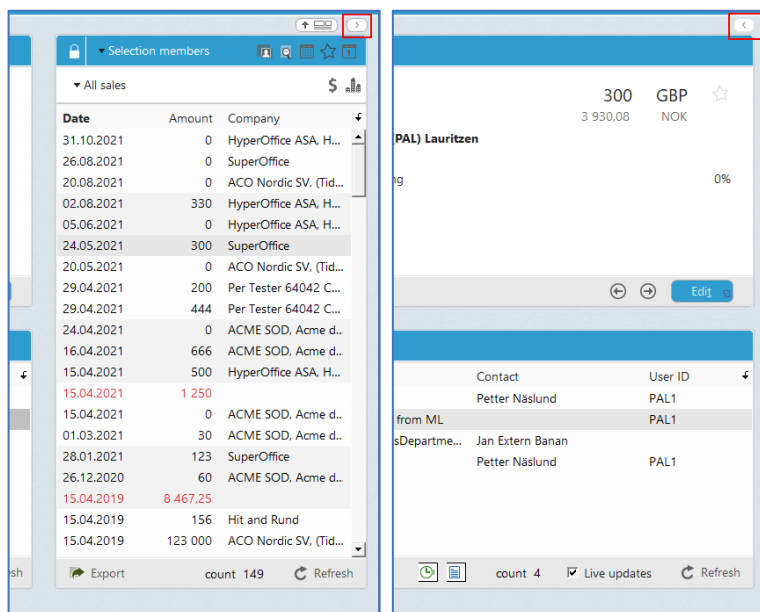


On the top right side, you have a button that switch the layout of the mini card.

You can choose to see the mini card that gives the same height as the main card. This view is very nice to use when selected mini panel do not need that much height, or that you need more room for the archives underneath.

Or you can choose to see the side card, that takes the whole height. This is very useful when you want to use the full height for the selected side panel, for example a list of sale, selection or project members.

Mini panel – Collapse mini panel to show archives in full screen (8.5 R16)

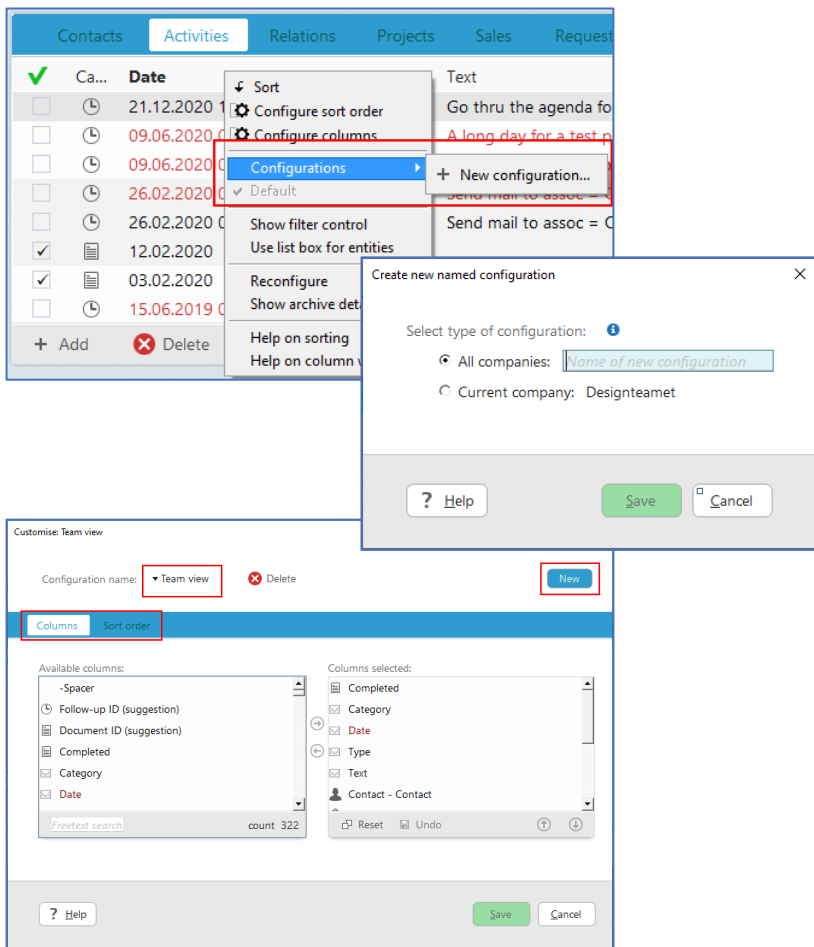


With the option to fully hide the mini card / side card, you have the full width for both main card and archives underneath.

That is very neat when you need more columns in the archives or have text that acquire more space.

The option is yours!

Customize archives – Multiple configurations on archive (8.5 R16)



For all archives, you have the option to have multiple configurations for columns, sort order and filters.

To create a new configuration, click the New button and in the dialog that opens, select the type you want. You have the option to select for:

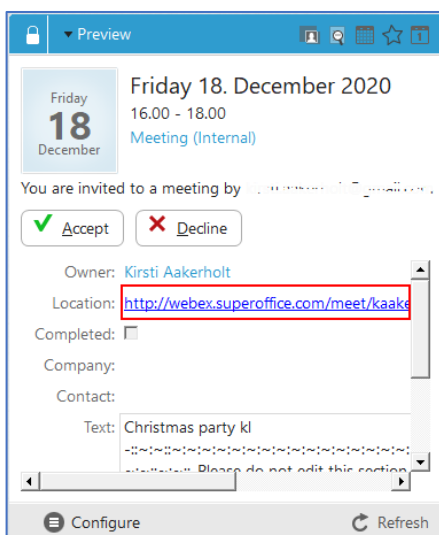
- All companies (selected main entity)
- Current company: xx (main entity). The configuration will only show when on this specific company/entity.

The dialog for Customise archive opens, and here you select the wanted columns on this view and the sort order.

You can have several configurations, and you can also create new and delete existing in the dialog. This is implemented on all archives in the Windows client.

The selected filters (Filter, Filters and Entities) will also be set for the new configuration, so remember to select the correct filters before you create a new configuration.

Appointment – Location clickable to open app (8.5 R16)



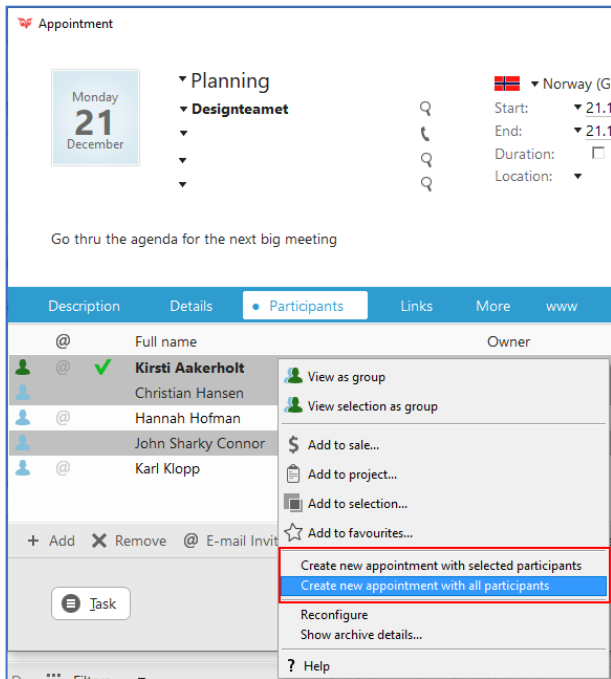
A meeting can have an url to a video meeting in the Location field on the Appointment.

Then it's very nice to just click the link in the preview panel and open the correct app to have your video meeting.

The Location field are clickable both in the Appointment dialog and the preview in Mini card.

Easy and quick!

Appointment – Create new based on existing (8.5 R16)



Sometimes it would be great to use an existing appointment as a template for a new appointment.

You want the same participants, the same time (not the date) and same text and other information.

Not the same as repeating, but almost.

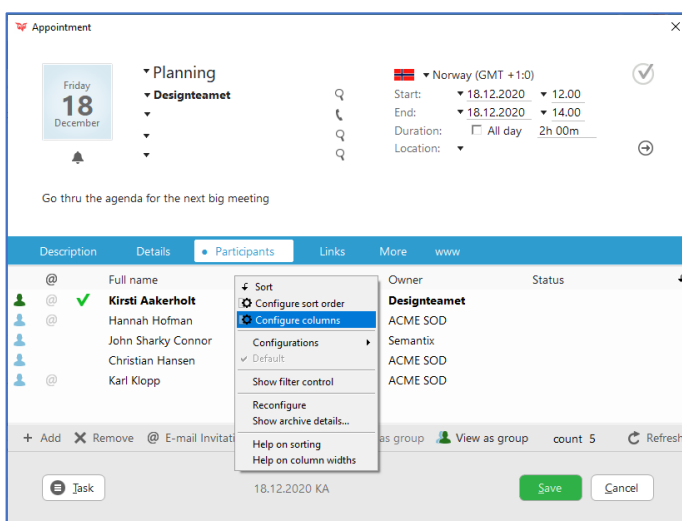
By selection one, some or all participants and right click, you get two options:

- Create new appointment with selected participants
- Create new appointment with all participants

When selecting this option, a new appointment dialog is opened, today's date is selected, but you can of course change whatever field you like.

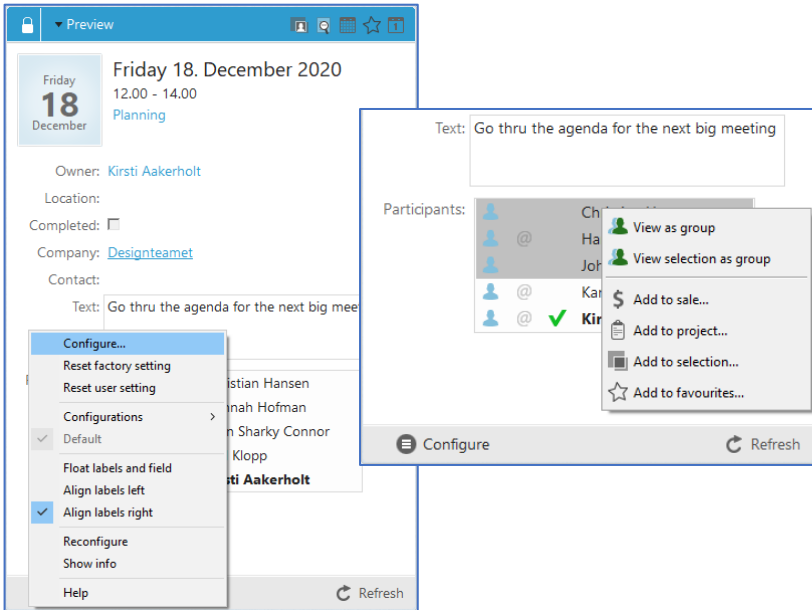
There are some fields not copied, that is due to the complex setup of the fields. This is fields like: Links and the Recurring/Repeat settings are not copied.

Appointment – Participants archive with configurable columns (8.5 R16)



The Participants archive on the appointment dialog is a NetServer based archive. You can configure the archive to show whatever columns you like.

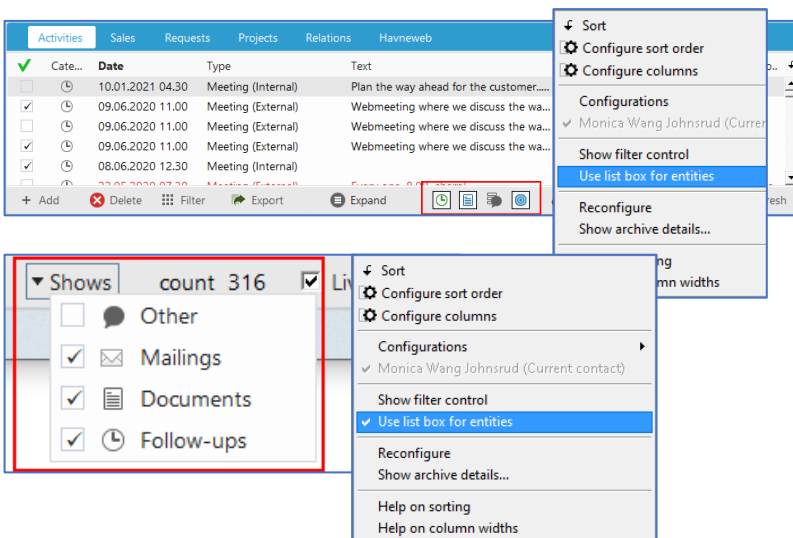
Mini card Appointment – Configurable fields (8.5 R16)



In the Mini cards you can configure the fields to show exactly what is best for you. This goes for all the different mini panels.

On the Participant section on the Appointment view, you have more options when you right click on the participants.

Activities – Archive filters with buttons (8.5 R16)



When your archive is a bit narrow, it is difficult to show all entities and check boxes in the archive footer.

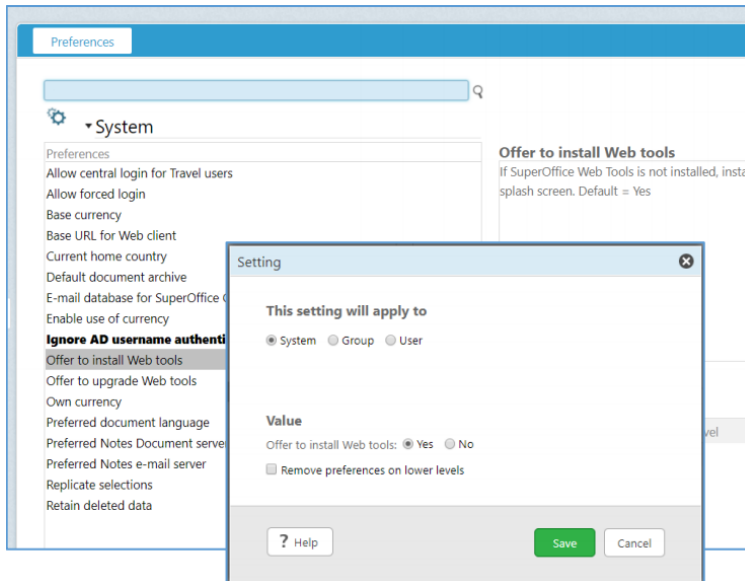
It's two settings to show the different entities – Use list box for entities:

- OFF – Buttons
- ON – Grouped check boxes

On some archives it's pretty crowded on the footer, so it's good to make the check box section a little smaller.

New and improved Settings & maintenance

Web Tools – Preference to control the appearance of Web tools install (8.5 R02)

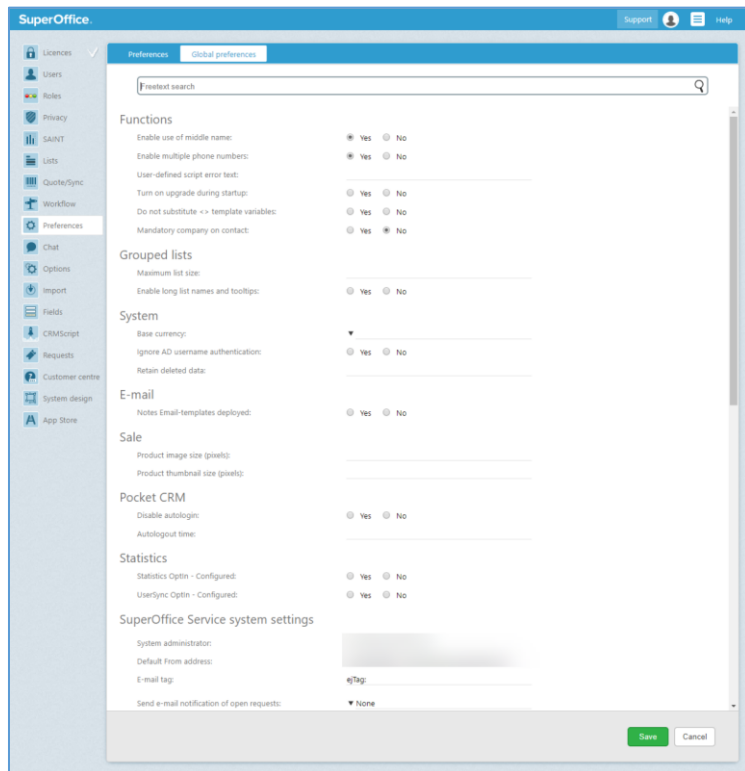


If SuperOffice Web Tools is not installed or when there is a new version available, the installation will be offered through a splash screen.

Sometimes administrators want to control who gets to see the “web tool” wizard. This is possible via new preferences in Settings and maintenance where the default settings can be specified to only be specific user/s.

This is particularly helpful when a company uses desktop virtualization and how to roll-out new versions of anything software is centrally managed.

Admin – New tab for Global Preferences (8.5 R04)



Preferences inside Settings & maintenance has a new tab for Global preferences.

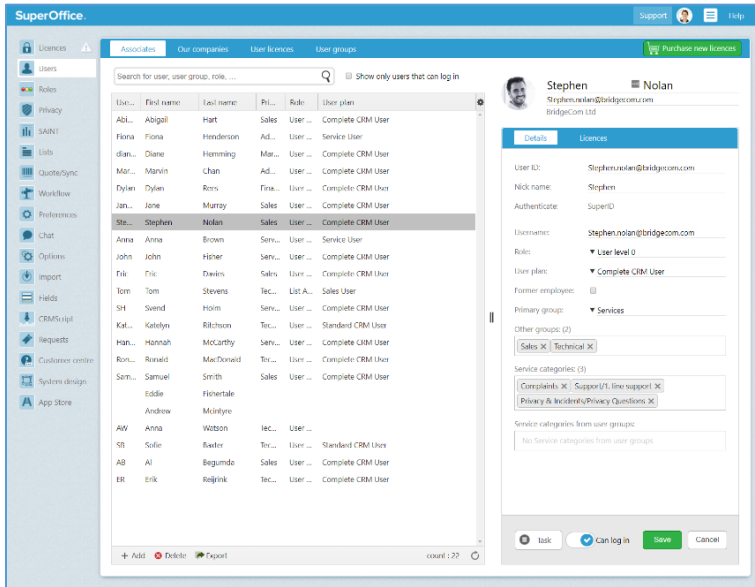
These are preferences that can ONLY be set system wide. This ensures consistency of the use and user experience for all users of your solution.

For example, you can set whether you allow middle names to be registered or which currency you want your users to use.

The fields you can set are divided under: Functions, Grouped lists, System, E-mail, Sale, Pocket CRM, Statistics and SuperOffice Service system settings.

You can save any changes you make by clicking the Save button in the bottom-right corner.

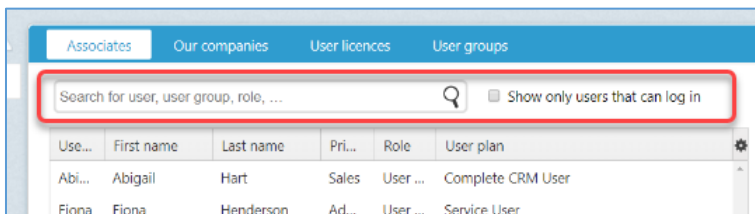
Admin – More efficient user management (8.5 R10)



The management of users have been improved to make it easier to administrate users in general and when handling large numbers of users in particular.

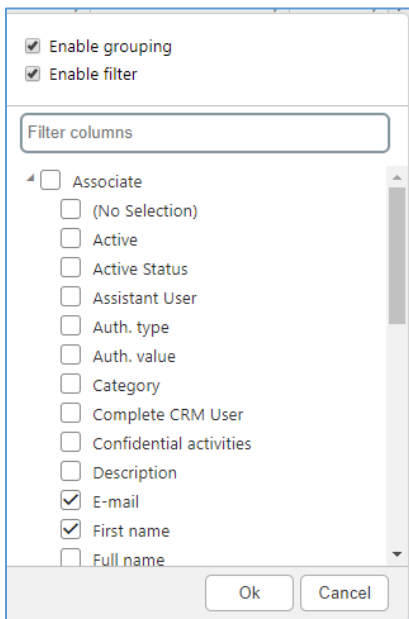
First, the **User admin** screen is split into two parts with a vertical resizable split. The vertical split is to give you the possibility to exploit the entire space for working with a long list of users.

The User ID and authentication fields are found in the Details tab where you can also set **User plan**, **Role** and what **Primary groups** and the **Service categories** and **Service categories from user groups** this person should have access to.



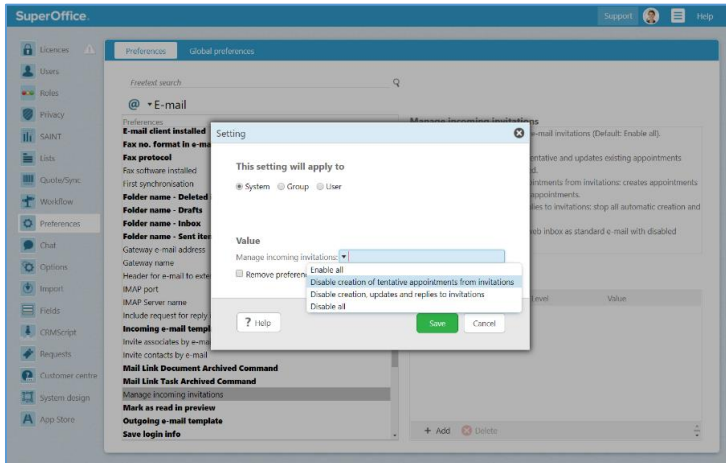
The setting to allow a user the ability to set archive items as confidential is now available under the Licenses tab.

It is possible to **search** for users based on a user's name, role, primary group and more.



In addition, you can enable **grouping and filters**. This way it's a lot easier to find groups of users to manage their details.

Admin – E-mail invitation preferences (8.5 R11)



There are new **Preference** settings available in respect to e-mail invitations.

You can **manage incoming invitations** in Settings and maintenance, under the tab **Preferences** where you can select **E-mail** to define how you want to manage incoming invitations.

Four options are available:

Enable all

Disable creation of tentative appointments for invitations

Disable creation, updates and replies to invitations

Disable all

You can setup how incoming invitations should be managed for the entire system, a group or specific users.

In **Preferences** you'll also find the option to use **iCalendar attachments** in your e-mails. By default the value for this feature is **Yes**.

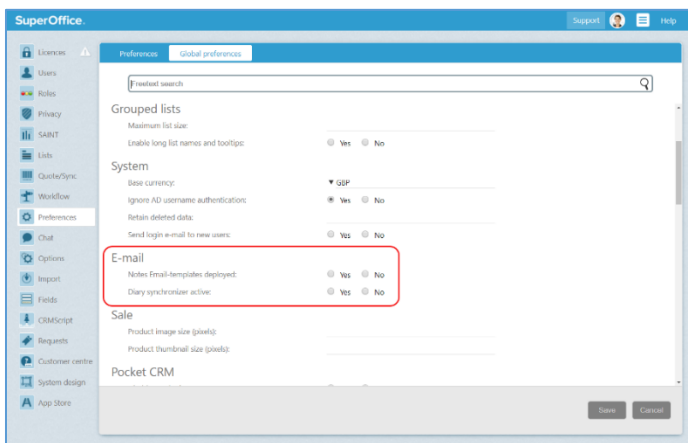
In the **Global preferences** tab, you'll also find E-mail settings where you can set whether you want the **diary synchronization** should be *on* or *off*.

By default the diary synchronizer is turned on and has the value: **Yes**.

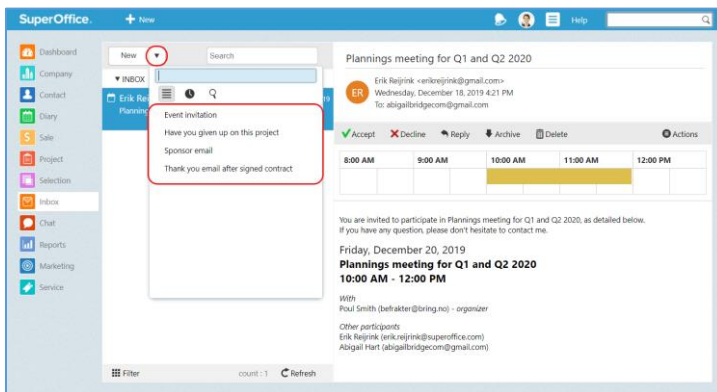
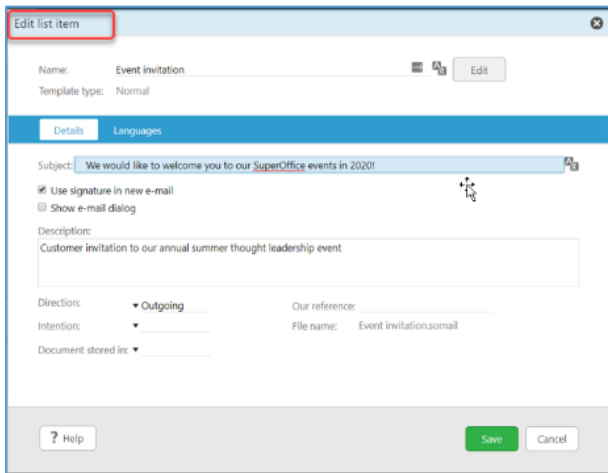
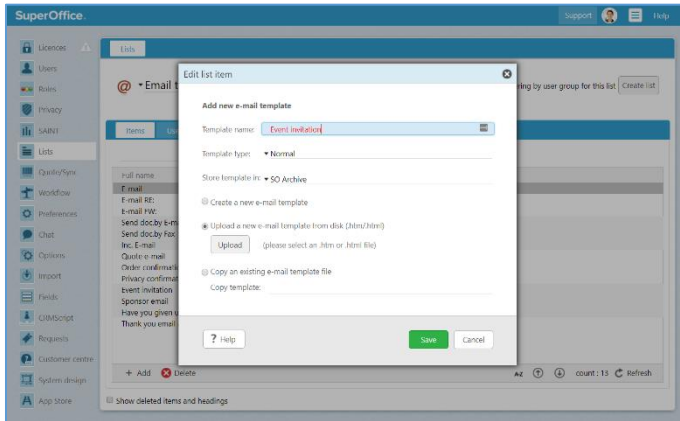
When this feature is *active*, the reply buttons on the e-mail will be disabled and SuperOffice will not create tentative appointments in a users' diary.

When the features is *inactive*, the reply buttons will be available and you're able to see tentative appointments in your diary.

In the **Personal settings** you can manage your personal preferences. The Default value is where you choose which **activity type** you wish to use when you receive an incoming e-mail invitation.



Admin – E-mail templates (8.5 R11)



You are now able to create **e-mail templates** in a similar way to other document templates.

E-mail templates are created in the **Settings and maintenance** view of SuperOffice CRM. Under **Lists**, you'll find all the e-mail templates currently saved and you can add new ones.

When you create a new e-mail template, you can create a normal template or you can choose to create a new quote, order confirmation or privacy confirmation.

You may add a new e-mail template by creating a new one from scratch, by uploading a template or copying an existing one.

E-mail templates available for a user inside SuperOffice CRM will also be available as options directly from within their SuperOffice inbox or in Outlook via the Mail Link.

In the **SuperOffice inbox** click on arrow by the **New** button to open the dropdown list of e-mail templates available to you.

Inside Outlook, a new button will appear named "SuperOffice Message" that directly accesses and opens templates as a new mail. See below for more details.

Admin – Monitor your metered services (8.5 R11)

STORAGE, MASS EMAILS AND CUSTOMER CENTRE LOGINS (PAY PER USE)						
	Explanation	Included 1-50 users	Included 51-100 users	Included 100+ users	Extra package size/month	Extra package price/month
Storage	Data and document storage	50 GB	100 GB	200 GB	50 GB	32,40 EUR
Emails sent via Mailings	Number of campaign email volume per month	15,000	30,000	60,000	50,000	32,40 EUR
Customer Center logins	Number of customer logins to the Customer Center per month	1,000	2,000	4,000	1,000	32,40 EUR
Chat sessions	Total number of chat sessions per month	1,500	2,000	2,500	1,000	32,40 EUR
Form submissions	Number of form submissions, volume per month	1,000	2,000	3,000	1,000	32,40 EUR

* Per user month

Metered services are services you pay for once you exceed a certain number of:

- Storage space used,
- Emails sent via Mailings,
- Customer Center logins reached,
- Chat sessions started, or
- Form submissions submitted.

The threshold depends on the number of users. The more users you have, the higher the threshold will be.

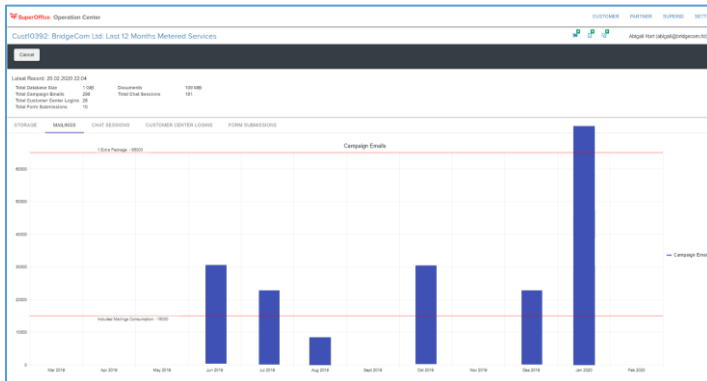
The screenshot shows the SuperOffice interface. On the left is a navigation menu with items like Licenses, Users, Roles, Privacy, SAKNT, Lists, Cache/Sync, Workflow, Preferences, Chat, Options, Import, Fields, CRMScript, Requests, Customer centre, System design, and App Store. The main content area is titled 'SUPEROFFICE' and contains a 'DATABASE' section with details for BridgeCom Ltd, including serial number, database type, next expiry date, user logged in, and powered by. Below this is a 'Metered services' button highlighted with a red circle. At the bottom, there is a 'SYSTEM NOTIFICATIONS' table with columns for Event, Status, Message, Activated, Activated by, Activat, Finished, and Type. A 'Help' button is also visible at the bottom left.

To make sure **you can monitor your usage levels** of these services, there is a dashboard to the Licenses module added in Settings and maintenance.

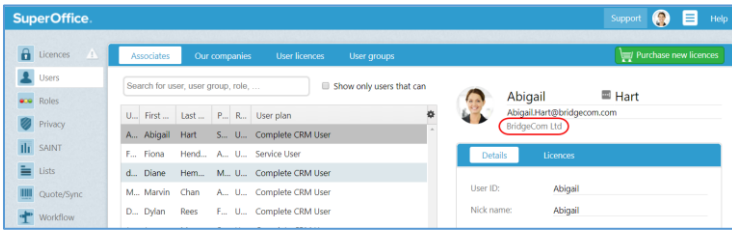
You can open and monitor the dashboard by clicking the **Metered services** button.

Administrators can follow exactly how much of each service has been used per month.

Whenever your company exceeds the threshold, **you'll automatically be invoiced** for these services on your next monthly invoice.

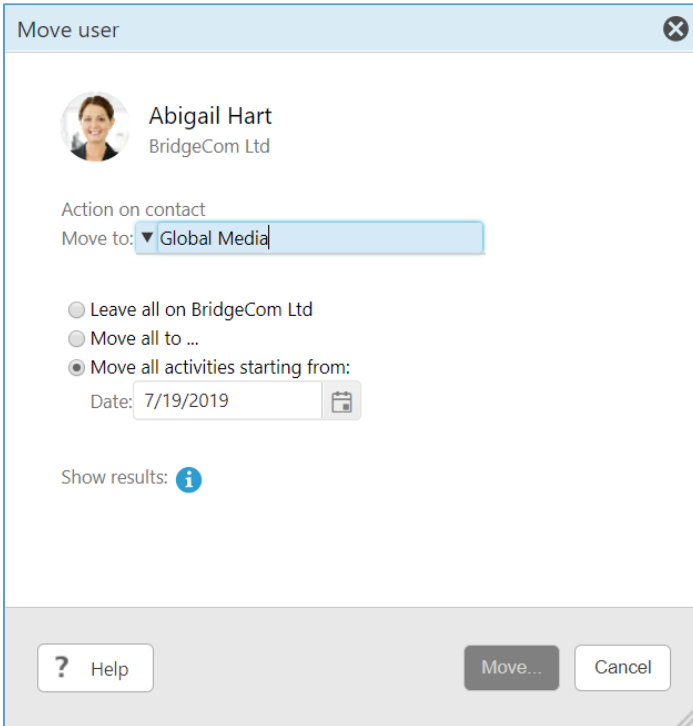


Admin – Save users on a different company card (8.5 R11)



Sometimes you want to change the company a user is registered on. For example, when a colleague moves from one office to another, or when they start working for the same company in a different country.

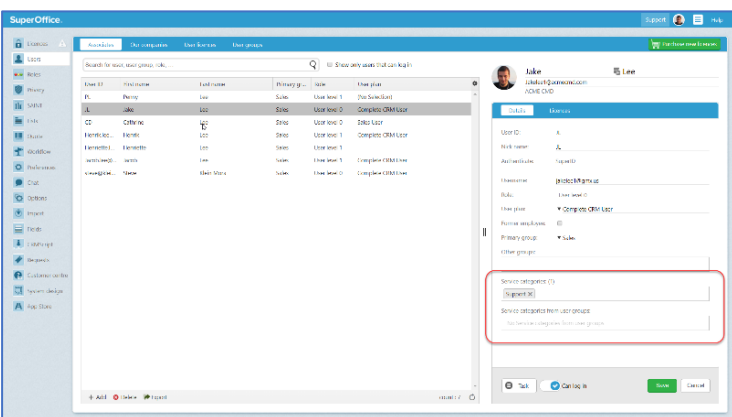
You can administrate your users in the Settings and maintenance module.



To change the company a user is registered to you open the **Users module** and go to the tab **Associates**. When you've selected the user, you want to move to another company, you can click on the company name underneath the user's name and email address on the right-hand side.

On the **Move user dialogue**, you can save the selected user on another company

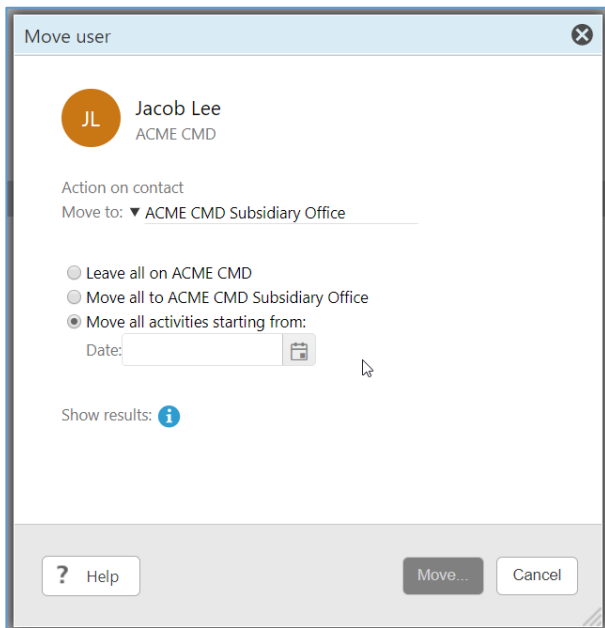
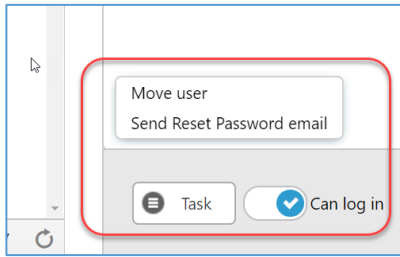
Admin – Assign service categories to users from Settings & maintenance (8.5 R12)



We continue to add features from the Service module in the CRM Settings and maintenance.

You can now manage user groups and service categories for your users.

Admin – Move a user from one owner card to another (8.5 R13)



Sometimes in a larger organisation it is relevant to move a user from one owner card to another. For example if an existing employee of one subsidiary begins working for another subsidiary.

In this version, this no longer creates friction in the users' diaries or archive histories, as it is possible to move the user from one owner card to another.

By clicking on the Task menu in the User administration screen, a new dialogue box appears giving you the option to move a user.

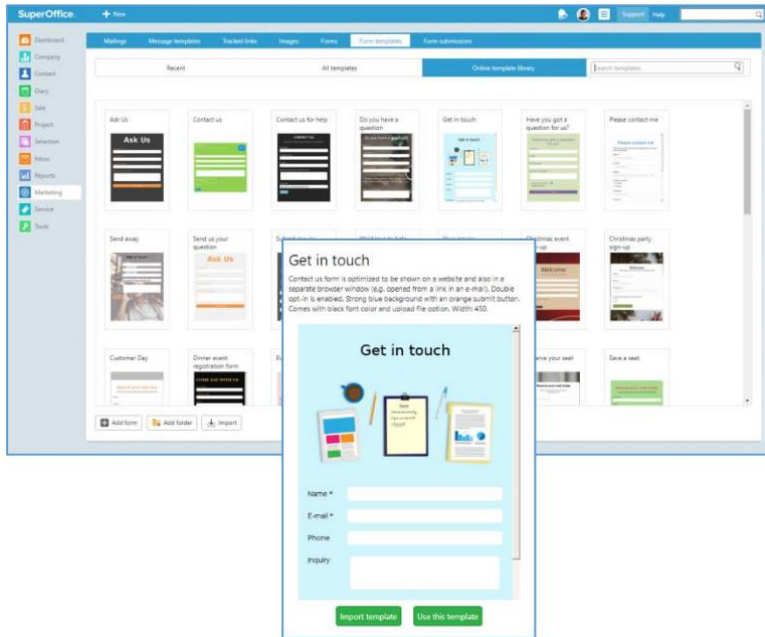
Options for existing activity history include:

- to leave all activities registered on the old owner company card
- move all to the new owner card
- move all activities starting from a specific date

Whichever option works in a given situation, the user can continue working in SuperOffice under the new owner card without any hassle.

New and improved Marketing

Marketing – Additional form templates (8.5 R02)



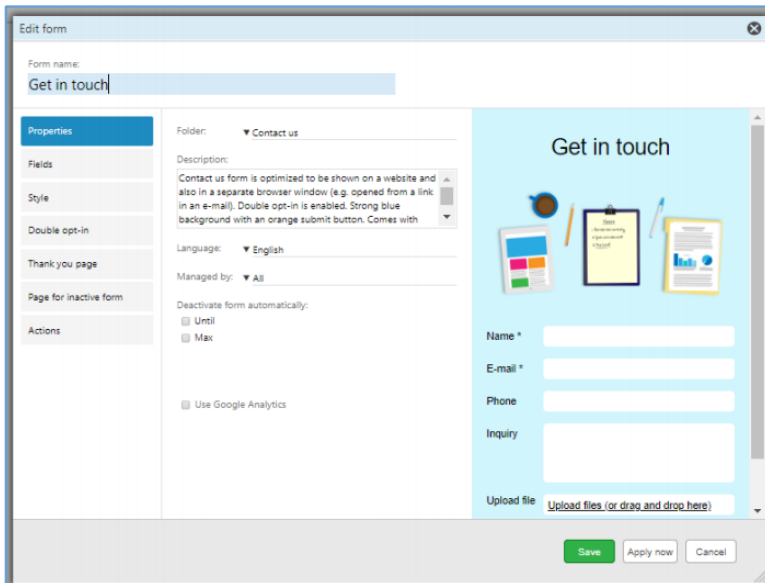
We have added 50 + new form templates in the online library.

When you go to the Form templates tab, click on the Online template library tab to view all the available templates.

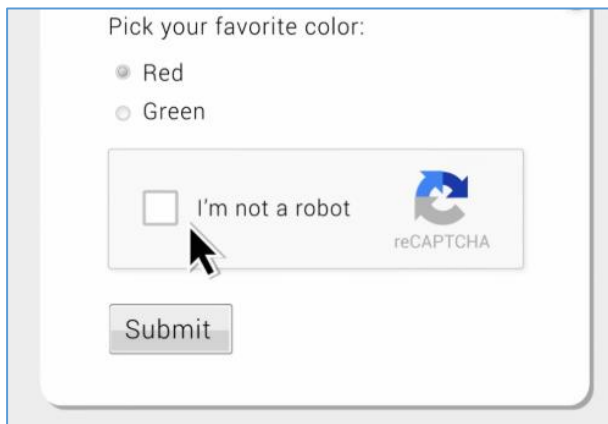
You can browse all templates or search by key words such as theme and colours.

You can open the form template you like by clicking on it. If you want to use it immediately, simply click on Use this template. This will open the form edit view where you may finalize the form for use. Or you can click on Import template to use it later.

All form templates can be further edited by you to fit your own needs and profile before you publish the form where you want it to appear.




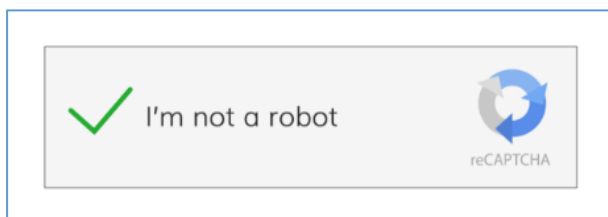
Marketing – Use Google reCAPTCHA for web forms (8.5 R04)




Pick your favorite color:

- Red
- Green

I'm not a robot  reCAPTCHA



I'm not a robot  reCAPTCHA

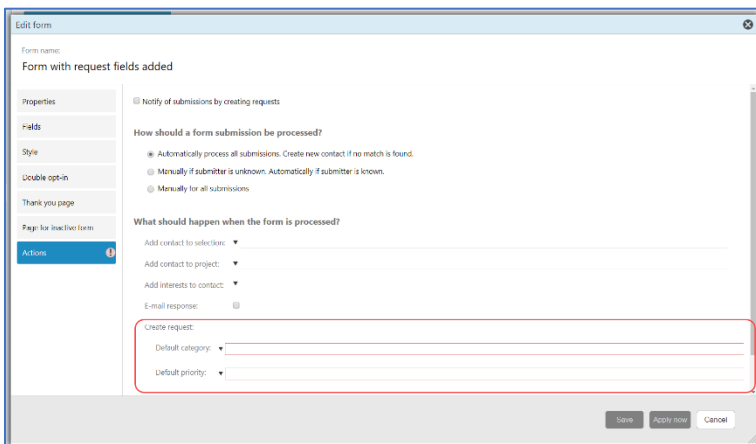
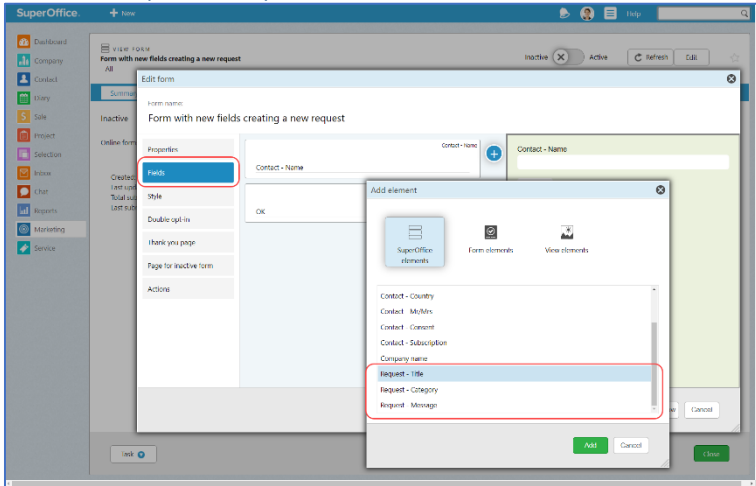
To avoid spam that sabotages your data collection, there are mechanisms that protect your website and the webforms you use from automated bots. One commonly used mechanism is the reCAPTCHA feature.

The reCAPTCHA I'm not a robot checkbox will ensure that only real users will be able to leave information on the webforms you use.

reCAPTCHA is a free service that protects your website from spam and abuse.

These features are currently only available for SuperOffice CRM Online users.

Marketing – New fields for creating a request directly via forms (8.5 R05)



New form fields are available which allows a submitted form to create a new ticket directly in SuperOffice Service.

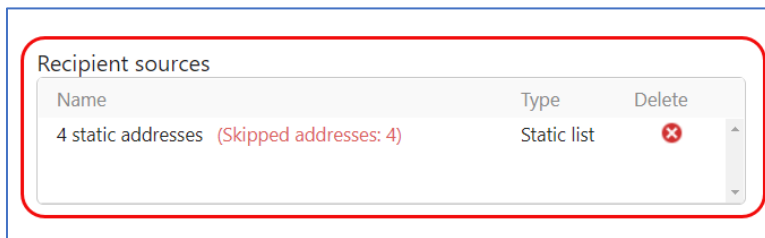
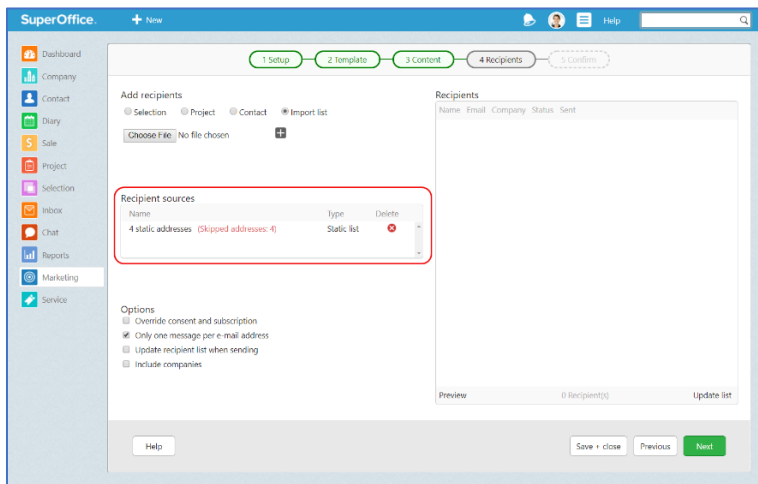
Up until now, it has been possible to ask to be *notified* via a request ticket that a form had been submitted. This for example is useful when all new form submissions are to be manually processed. The request ticket alerts to look at and then process the new form submission.

The new form fields available creates a new request when the form is submitted and adds the content of the form fields directly into the request. The form fields that can be added are **request title**, **request category** (this will display the list of external categories) and the **request message**.

When any of these fields are added to a form, a fallback category and priority have to be defined as **Actions**. This ensures that a new request is attended to, no matter what fields have been completed by a form submitter.

Note that in order for a form to be used inside a Customer Centre, the form has to contain at least one of these request specific fields. Only activated forms with these fields will appear as options under the Customer Centre configuration panel (see below).

Marketing – Prevent import of contacts not registered in your SuperOffice (8.5 R08)



When you're creating a new mailing, you can add your recipients in step 4 of the mailing wizard.

Normally you add recipients by choosing a single contact, a selection or a project you've created in SuperOffice CRM.

Yet, sometimes it's easier to use a selection or list you've created in a different solution, like your ERP solution for example.

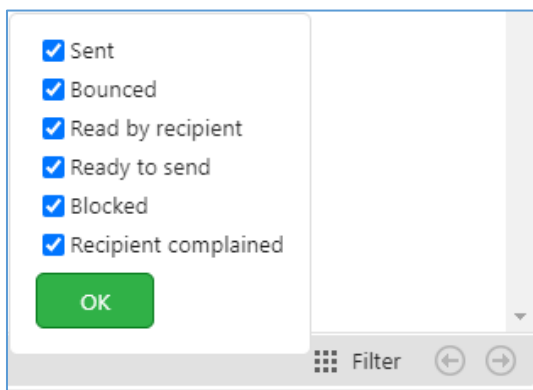
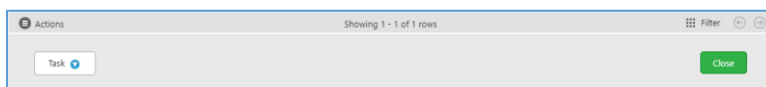
Especially when it's hard to re-create this list in SuperOffice it's pretty useful that you can import this contact list using a comma-separated file (txt, csv, or similar).

Make sure the contacts you want to import are registered in SuperOffice. Because contacts who are not registered in SuperOffice will be skipped, which means they won't be included in your recipients list.

Afterall, you can't follow up on a contact who isn't registered in SuperOffice CRM, or add them to a project, selection or a future mailing.

By only using registered contacts in your mailing, you'll prevent bounces and improve your mailing results.

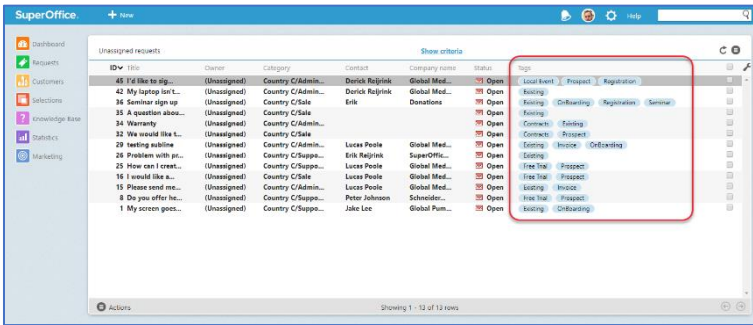
Marketing – Paging on Recipients tab (8.5 R16)



When there is a lot of blocked e-mail addresses, the performance is slow. With the paging option on the Recipients tab, the performance feels better, and you can use the filtering for more specified work.

New and improved Service

Service – Tag your requests (8.5 R01)

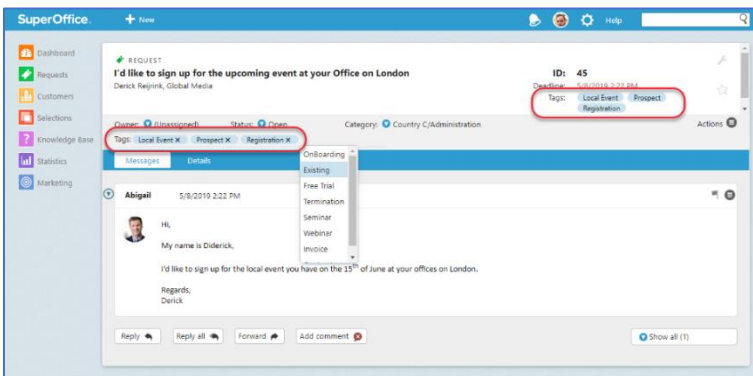


You can use tags to search for and group requests based on the criteria they have in common.

The advantage of using tags is that you can search for requests using multiple tags. Where a single request can only have one category.

Your SuperOffice Administrator can assign you the functionality to create new tags.

You can search for tags by typing the name in the tag field. SuperOffice will show you a list of tags that match your description.



Service - Select language when using reply templates in a ticket (8.5 R02)

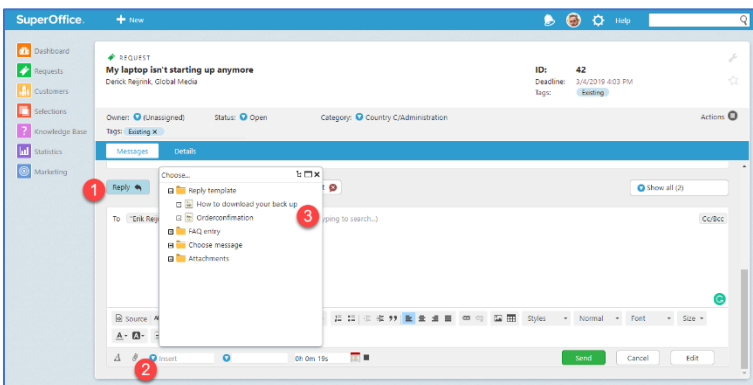
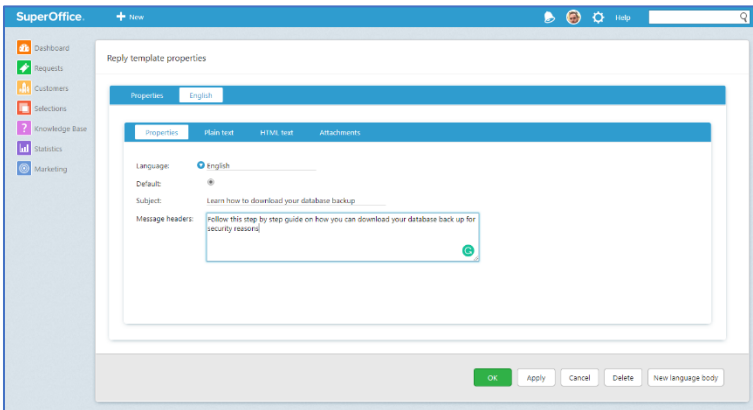
You can add your reply templates in all the languages you need to help you customers.

In the Knowledge Base you can create your reply template in different languages by using the feature New language body.

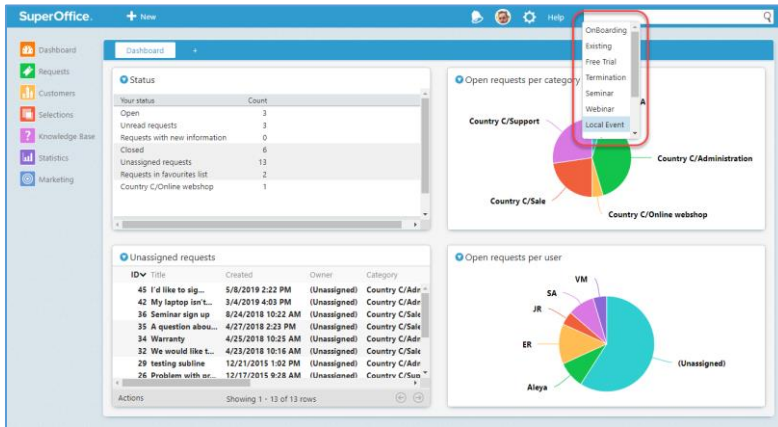
In the Reply template properties, you can add the content of your template in plain text or as HTML text.

To use the reply template, open a request and click **Reply**. Then click where it says Insert and find the reply template you want to use in the folder structure.

Select the template in the language your customer needs and press **Send**.



Service – Use # to search for requests with the same tags (8.5 R02)

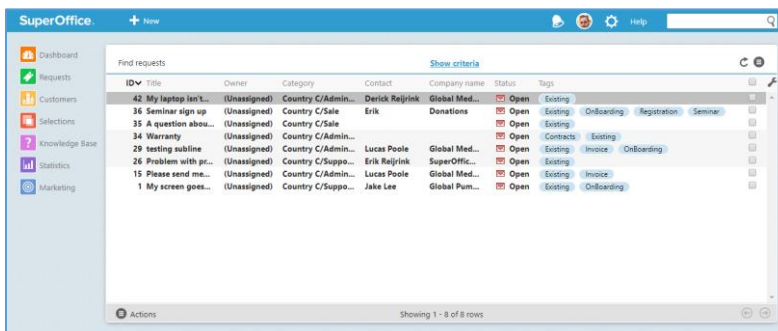


When you want to find all requests that have the same tag(s), you can use Quick search.

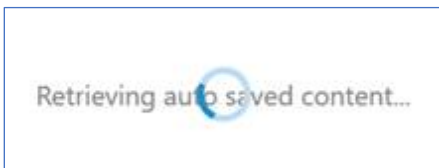
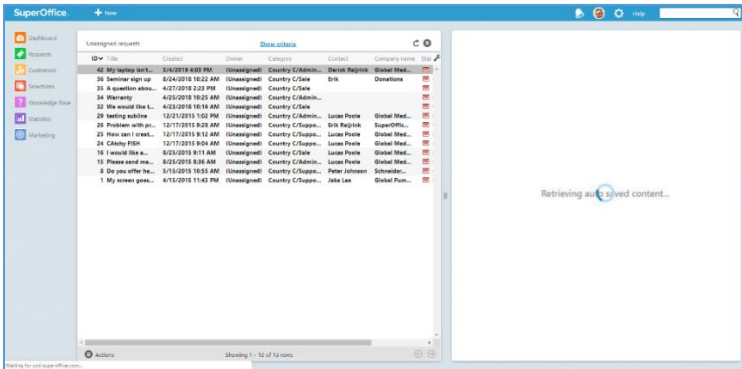
Click on the search field in the top right-hand corner, enter # and SuperOffice Service will give you a list of all the tags that are available.

You can select the tag you were looking for to get a list of all the requests that have been marked with the same tag(s).

Add multiple tags to narrow down your search even more.



Service – Autosave the information you've added on a request (8.5 R03)



Whenever you're working on a request and another request comes in that has more priority, you'll have to leave the request you are working on to solve the request that just came in.

SuperOffice will **automatically save the information** you've already added so you can continue where you left it when you come back to the request.

Because autosave is saving the text in the local Storage of your browser, it will even survive a browser crash, reboot, logout and login.

It will however not transfer from one computer to another. You cannot start replying to a request at work, and then continue the reply at home. It will not be shared between two different browsers. Nor will you be able to leave work on Friday and return on Monday and expect it to be there.

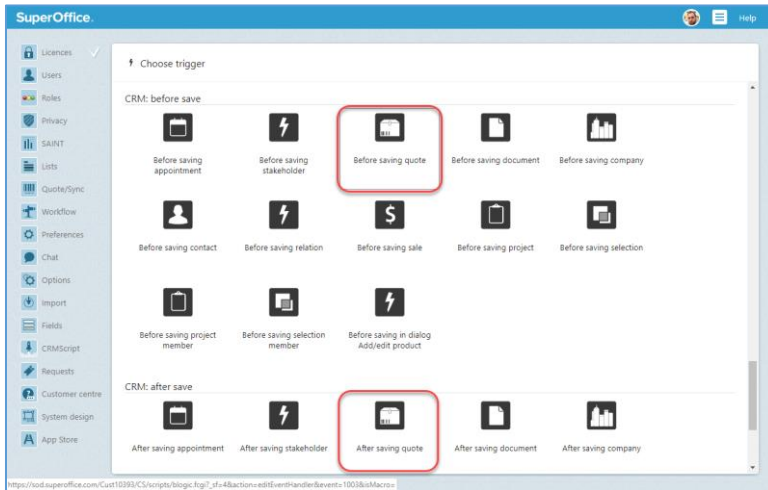
The autosave feature is out of the box ON, when you use the View request (including quick reply) and Edit request (including Reply/Reply all) screens.

For custom screens, there is a new checkbox when you edit a screen where you can enable autosave.

The autosave continuously stores the data you input until you click on OK to send or Cancel.

Autosave will save you time and allow you to work more efficiently when moving between screens.

Service – CRM Script triggers: Before and After "Quote line saved" (8.5 R03)



A CRM script helps you automate tasks or modify the behaviour of SuperOffice.

Triggers are scripts that are executed for specific events in the system, such as when a new sale is created, or a request gets closed.

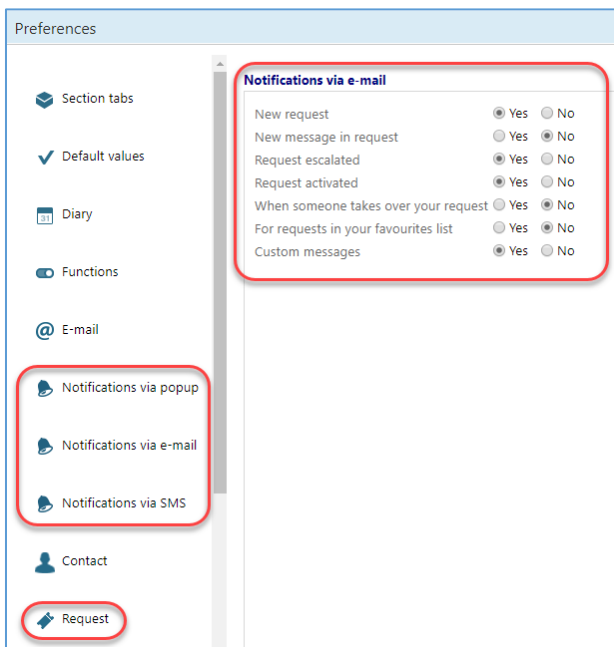
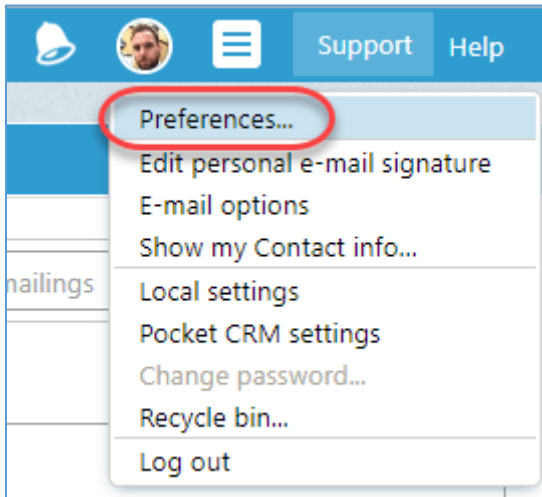
Triggers can react silently to what happens or block the operation and show an explanation back to the user.

It is now possible to create scripts which are executed whenever a quote line is saved.

This allows you to create your own custom rules for this process. For instance, a script can prevent users from offering discounts to non-VIP customers. Or send an e-mail to sales manager if the quote exceeds a specified amount.

If you aren't familiar with CRM scripting from before, you can read more about it [here](#).

Service – Your personal preferences for requests and notifications available in SuperOffice CRM (8.5 R03)



In SuperOffice Service you get notified about a new request, a new message or the fact that a request was escalated to you via:

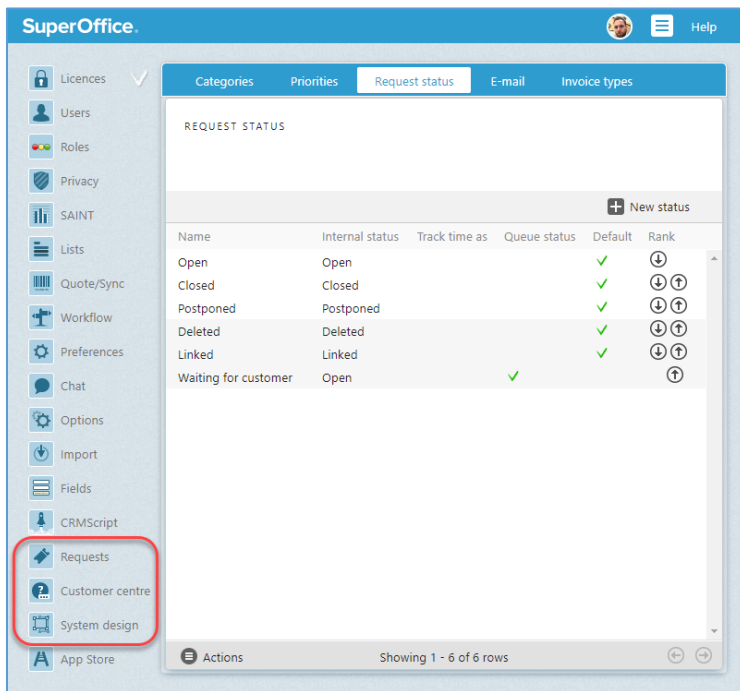
- a popup,
- an e-mail and,
- SMS.

You can manage your personal preferences for these notifications and your request settings in the Preferences menu in the Personal menu. You'll find the Personal menu in SuperOffice CRM

Here you select whether you want to receive a popup, e-mail or SMS by choosing **Yes** or **No** for each possible scenario.

When you've updated your preferences, you click **Save** to register your changes.

Service – Configure your request settings from the SuperOffice CRM Settings and maintenance (8.5 R04)



As a CRM administrator you are now able to customize your Service solution from inside the SuperOffice CRM administrator client.

You'll find that three new icons have been added:

- Requests
- Customer centre
- System design

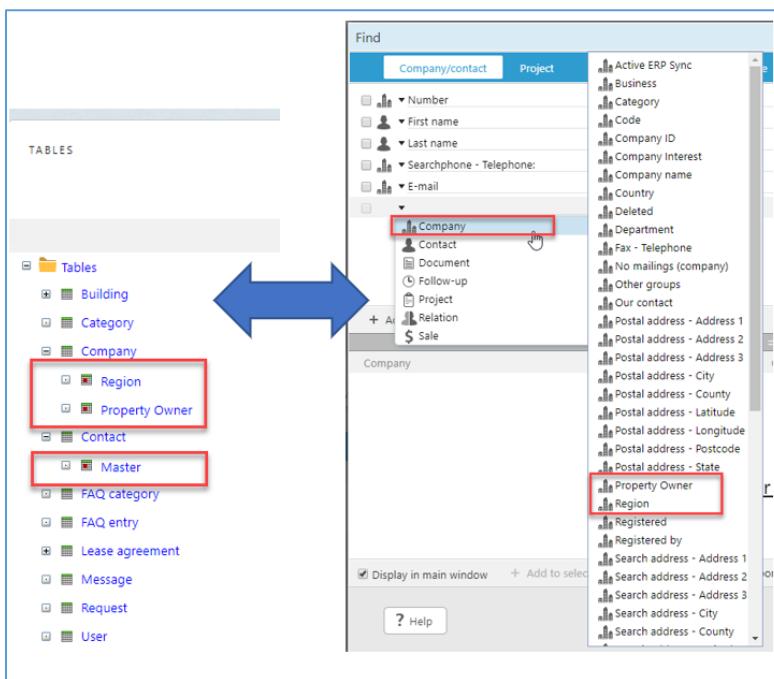
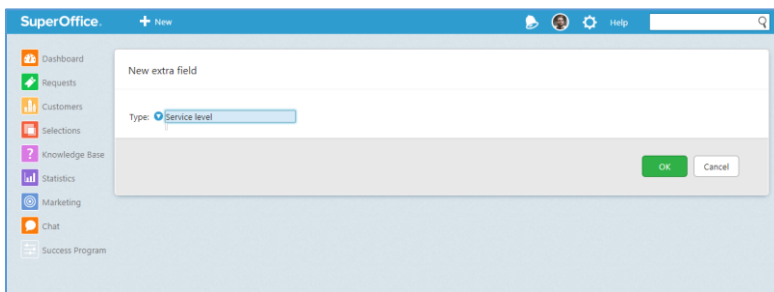
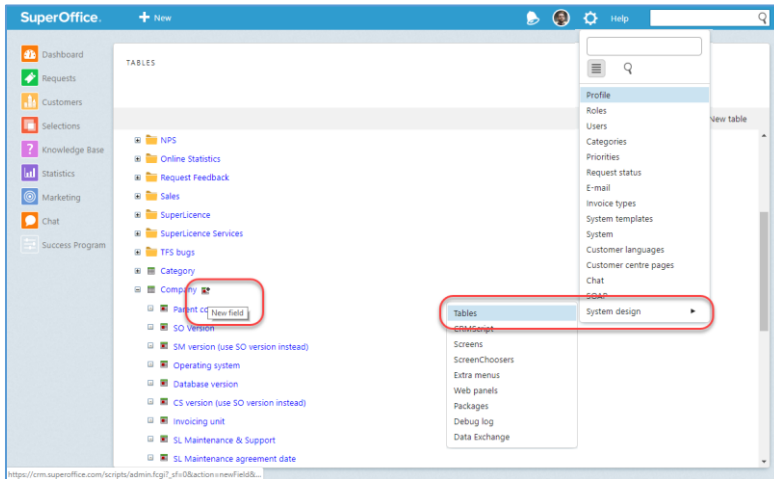
You can use these features to change and configure your Service solution.

These extra icons are only visible for those companies who have the Service user plans as part of their licenses.

In addition, to see and customize Service via the System design set of features, your company needs to have activated the subscription for Expander Services.

These features are currently only available for SuperOffice CRM Online users.

Service – Add extra fields to columns and search criteria (8.5 R04)



In SuperOffice Standard CRM you can now make selections and search for companies or contacts using fields you've added in SuperOffice Service.

Let's say you have created an extra field inside Service for the different type of customer service levels. For example, you have an extra field that's called "service level" and for example have added values such as "Platinum", "Gold", "Silver" and "Bronze" as the different levels.

You are now able to not only find the companies with any of these values inside Service, but you are also able to search and create a selection of contacts and companies based on these field from within the SuperOffice Standard interface. For example, a selection of all companies with a platinum service level, and so on.

You need to have Service or Complete user plan to access Service and have an active subscription for Expander Services to add extra fields. You can add extra fields in the System menu. Go to System design and choose Tables. Here you can add extra fields.

Once you've added your field, these fields will automatically be available when you use the Find feature, Selections and when you configure your columns on the Company or Contact card for example.

With this latest change it is possible to access and use information saved in your Service solution from inside the Standard CRM solution.

These features are currently only available for SuperOffice CRM Online users.

Service – Select extra table relations fields to be visible as columns and search criteria (8.5 R05)

The image shows two screenshots from a software interface. The top screenshot is the 'Field properties' dialog box. It has several sections: 'Type' (Extra table relation), 'Name' (Leases), 'Description' (empty), 'Table' (System/Company), 'Database field' (X_Leases), 'Show one-to-many relations' (checked), 'Header for list' (Companies), 'Hide function buttons' (unchecked), 'Target table' (Lease agreement), 'Choose from list box' (unchecked), 'Only allow leaf nodes for hierarchical list boxes' (unchecked), 'Cannot be empty' (unchecked), 'Hide the field' (unchecked), and 'Show fields in target table in archives' (checked). A red box highlights the 'Show fields in target table in archives' checkbox. The bottom screenshot is the 'Find' window. It shows a list of fields on the left and a list of fields on the right. A red box highlights the following fields: Lease agreement - Building - Address, Lease agreement - Building - Acquired, Lease agreement - Building - Floors, Lease agreement - Building - Has janitor, Lease agreement - Building - id, Lease agreement - Building - Is rented, Lease agreement - Building - Name, Lease agreement - Building - Next service, Lease agreement - Building - Value, Lease agreement - End date, Lease agreement - id, Lease agreement - Lease description, Lease agreement - Rental Customer, Lease agreement - Start date, Lease agreement - Valid, No mailings (company), Other groups, and Our contact.

Extra fields linked to the Company, Contact and Request fields inside SuperOffice Service are (as described above) available in Find, Selection and as Columns inside the CRM client.

As extra tables in Service may be configured to consist of more than one level this capability have been expanded.

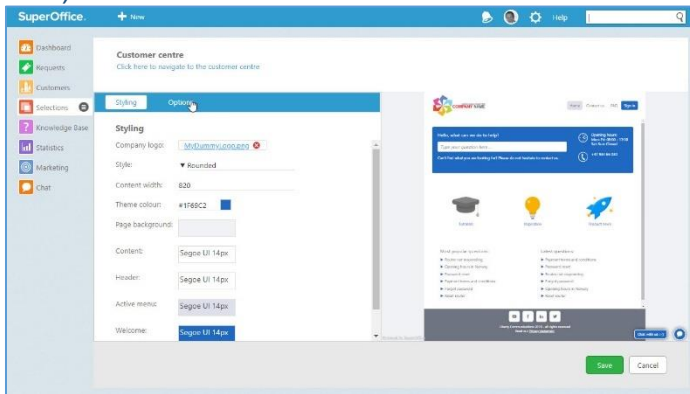
It is now possible to select if any additional levels also should be made displayed as fields in Find, Selection and Columns inside the CRM client.

This is particularly relevant when the extra tables in Service relate to each other.

For example, say extra fields have been created for with a structure for “Lease agreements” and “Building” where a Company has “Lease agreement” for a particular “Building”.

With the added level, it is possible to find the relevant connection between the Company, Building and Lease agreement to view or act upon this information in many different contexts.

Service – Configure the Customer Centre via a new configuration tab in Settings and Maintenance (8.5 R05)



The **Customer Center** is a standalone portal that can be integrated into any existing website and is a component available for all who have access to the Service feature set.

Through the Customer Center a company's end-customers can log in, view their request history, ask questions and search in the knowledge database 24/7.

To provide the best customer experience, the look and feel of this self-service portal should be similar to that of a company's corporate branding. It reassures a customer that they are in the right place.

Historically even simple changes to Customer Center required knowledge about how files used by the Customer Center are structured as well as web design coding. This made it overly complex to change.

The new Customer Center configuration feature set instead allows an admin user, without any prior knowledge about web design coding, to quickly and easily change certain pre-defined configurable elements.

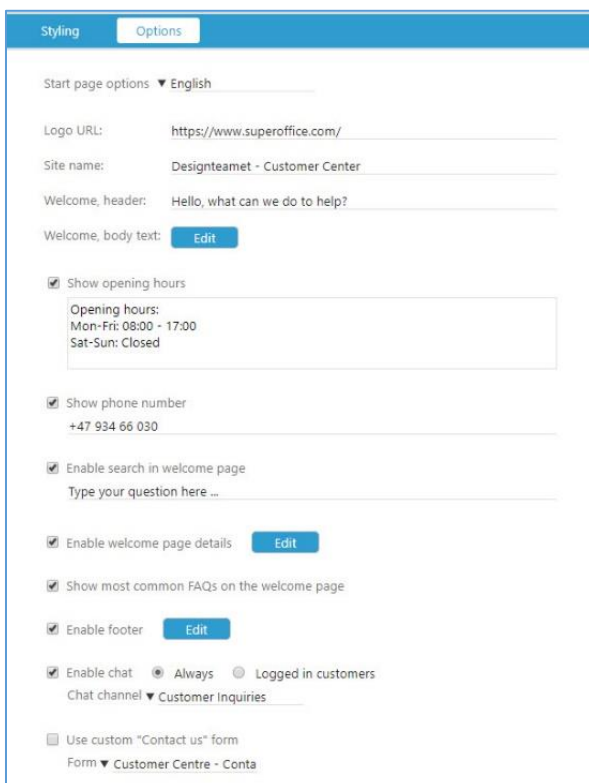
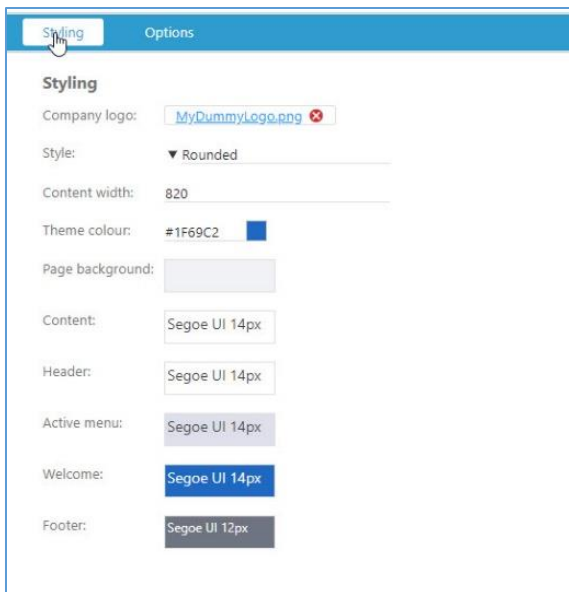
Options include adding forms and chat to a Customer Centre.

Introducing this feature does not limit customers with already customized designs or with more advanced needs, but rather is a building block using more up-to-date design as a baseline.

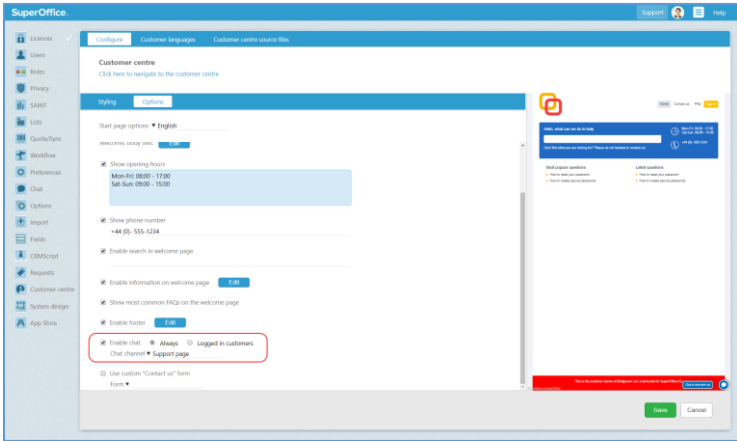
This new feature is available for customers using the SuperOffice Service or the Complete user plan and version 8.5 R05 or newer.

Note that this feature is available out-of-box for all new customers and the configuration is populated with default values.

Existing customers with customized pages will not have their pages replaced. They have to manually convert to use the new configuration options for their Customer Centre pages.



Service – Chat used inside the Customer Centre will have automated authentication (8.5 R05)

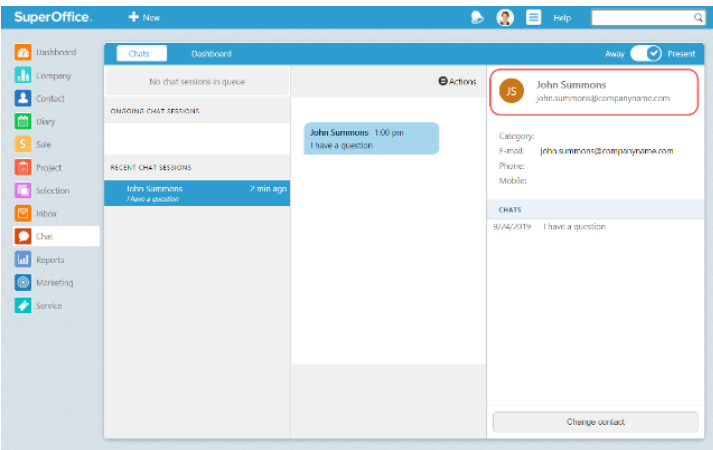
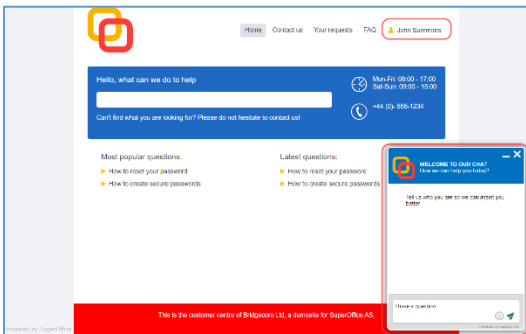


Chat can be used in combination with the Customer Centre whereby users of a Customer Centre can reach out via chat.

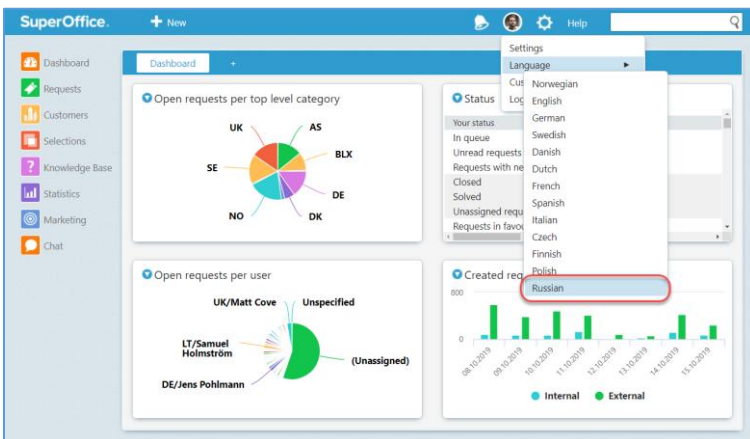
If a user who has logged in to a Customer Centre initiates a chat via the Customer Centre, they will in addition be automatically authenticated.

This means that the user do not have to give their contact details in order for a responding chat agent to know who they are, find their past history or log the chat conversation under the right contact card.

This makes it even more convenient for users of a Customer Centre to use chat, and easier for agents to respond in the best possible way.



Service – Now also available in Russian (8.5 R06)

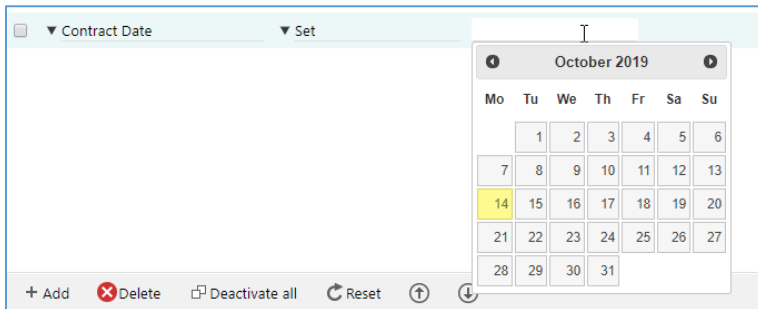
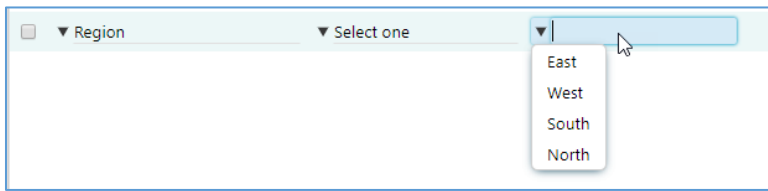
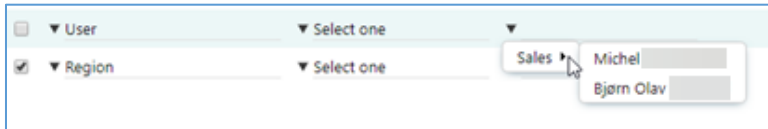


SuperOffice Service can now be used in Russian.

To change your user language to Russian, open your personal menu and go to **Language**.

Here you can select Russian to change the labels to this language.

Service – Bulk update Extra fields (8.5 R06)



The extra fields created in Service has earlier (8.5 R05) been made available to find, create selection of and to view as columns in the standard CRM client.

Now it is possible to bulk update these fields too.

From the **Selection** screen in SuperOffice Standard the **Bulk update** feature is available under the **Task** tab.

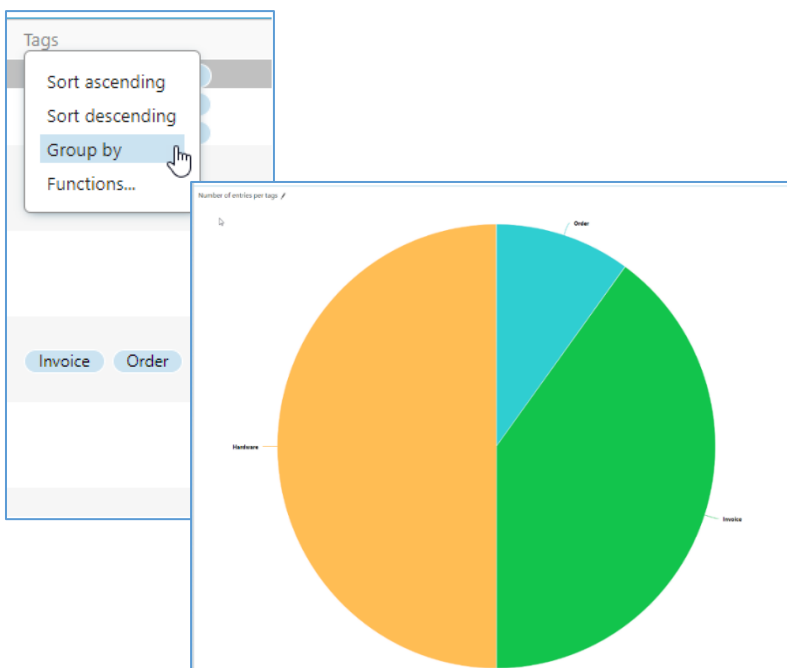
In the Bulk update dialogue, you can select the different fields you like to change.

The Extra Fields from SuperOffice Service is now available to bulk update together with the other fields with the exceptions of the fields “Extra table relation” and “Dynamic link”.

The fields “Date and Time” and “Timespan” are also currently only supported in the Windows version.

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

Service – Configure your columns by grouping your requests based on tags (8.5 R07)



When you’ve made a selection in Service you can group the requests in your list by the different columns that are available to you.

By grouping your requests based on the **tags** used, you can easily see how many requests of each type of tag are present in your selection.

You can discover new trends of tags that have de- or increased over time.

We have also improved the pie charts you can make from your selection. This will give you a visible representation of the different tags in your selection.

Service – Extended e-mail domain validation in chat and forms (8.5 R08)

Want to receive our newsletter?
Fill in your details below

Contact - name *
Johnny Cash

Contact - e-mail *
johnny@123.com **The e-mail address is not valid**

Have you read our privacy statement? *
 I approve your privacy statement

Site key missing. Please configure.

OK

Contact - e-mail *
johnny@123.com **The e-mail address is not valid**

When a person, visiting your website, enters their contact details on a web form or when they initiate a chat, they will be asked for their e-mail address.

SuperOffice will check and validate this e-mail addresses to make sure it's an existing domain name. If the person uses an e-mail address with an invalid domain name, an error message will pop up, explaining their e-mail address is not valid.

This way, only people using valid e-mail addresses will be able to contact you through chat and web forms.

It will improve the quality of the customer data you save in SuperOffice CRM.

Service – Ukrainian language added to improved customer experience (8.5 R10)

SuperOffice. + New

Dashboard

Requests

Customers

Selections

Knowledge Base

Statistics

Marketing

Chat

Status

Your status	Count
Open	1
In queue	5
Unread requests	1
Requests with new information	0
Closed	30
Unassigned requests	16
Requests in favourites list	3

Open requests per priority

Created requests

Settings

Language

- Custom
- Norwegian
- English
- Log
- German
- Swedish
- Danish
- Dutch
- French
- Spanish
- Italian
- Czech
- Finnish
- Polish
- Russian
- Ukrainian**

SuperOffice Service can now be used in Ukrainian.

To change your user language to Ukrainian, open your personal menu and go to **Language**.

Here you can select Ukrainian to change the labels to this language.

Service – Standard reports to monitor Chat conversations (8.5 R11)

Chat

- Sessions per channel past 4 weeks
- Sessions per agent past 4 weeks
- Sessions per weekday past 4 weeks
- Sessions per hour-of-day past 4 weeks
- Average queue length per hour-of-day past 4 weeks



SuperOffice Service now contains five **standard reports for Chats**.

You'll be able to monitor incoming chats and the workload of your support team per hour of the day and for different days of the week.

With these reports you can, for example, see when your team receives the highest number of chats during a day. Or how long people have to wait on average before they receive help.

You'll get an insight on the volume of the chats your company receives for each chat widget that you use on your website(s)

Chat – Widget can open in new window (8.5 R16)

Chat with us. We'd love to help you out!

Due to the security settings in your browser, the chat must be opened in a separate window.

Click to open

SuperOffice live chat! - Google C...

Chat with us. We'd love to help you out!

YOUR NAME
Your name

YOUR E-MAIL ADDRESS
Your e-mail address

YOUR COMPANY
Your company

Type your question here...

Powered by SuperOffice

Due to a change in privacy on websites, most websites do not allow 3rd party cookies, so user cannot be tracked.

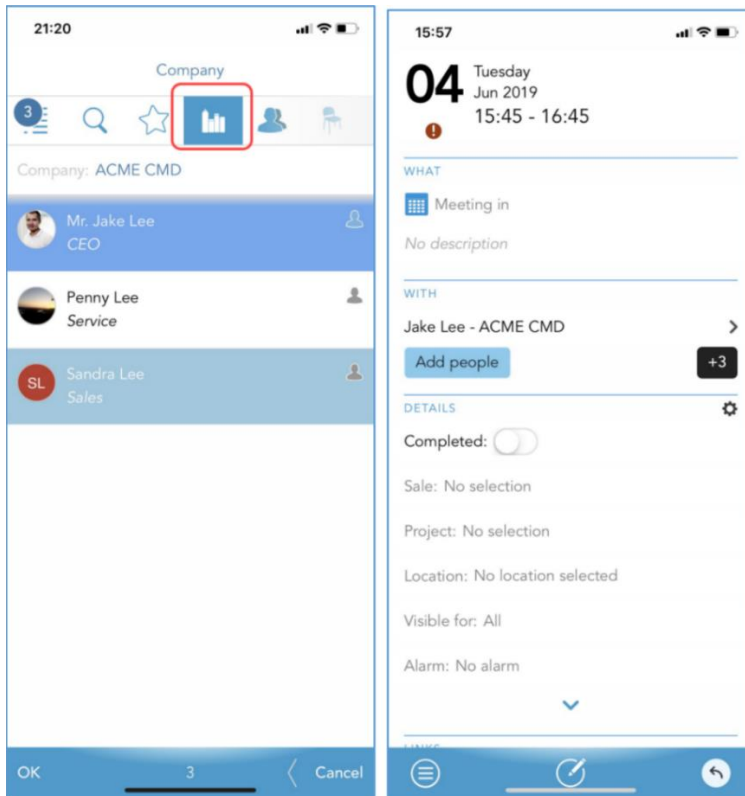
But for chat, we do need to track you to keep the conversation going.

So, before we get a standard behaviour, we have introduced when the chat widget is placed on external website, will open in a new window.

With that option the chat can keep going with a tracking of the session, and the person can finish the chat without interruptions.

New and improved Pocket CRM

Pocket CRM – Improved UX for adding participants to a new appointment (9.0.4)



Based on user-feedback the design has changed to make it easier to add and select contacts and participants in a new appointment.

When you create a new appointment and click on **Add people** the default search view is for either Company or Contact. If you find a company name via this, you can add the company as a participant.

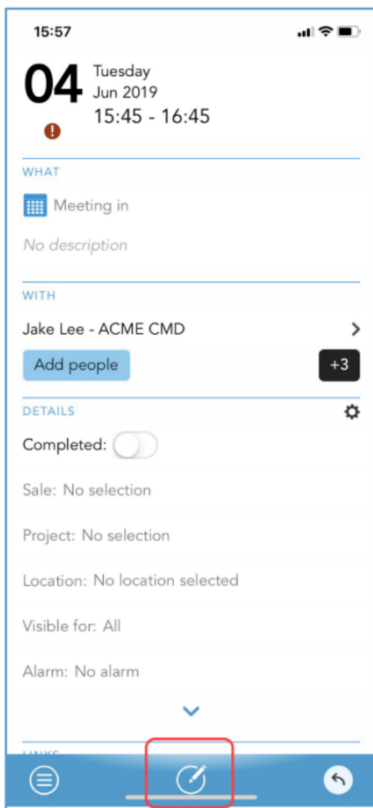
However, if you narrow your search by clicking on the **Company** icon on the top, you not only find the company you search for, but when you click on the company name, you see all the contacts registered against it.

This is helpful if you don't remember the person's name, but you remember the name of the company the person works for.

It also lets you add multiple participants from a single company from this view. Click on the names you want to add to your appointment. Each name you select are automatically added to your appointment when you click OK.

These changes make creating the appointment both easier and more efficient.

Pocket CRM – Better user experience for editing an appointment (9.0.4)

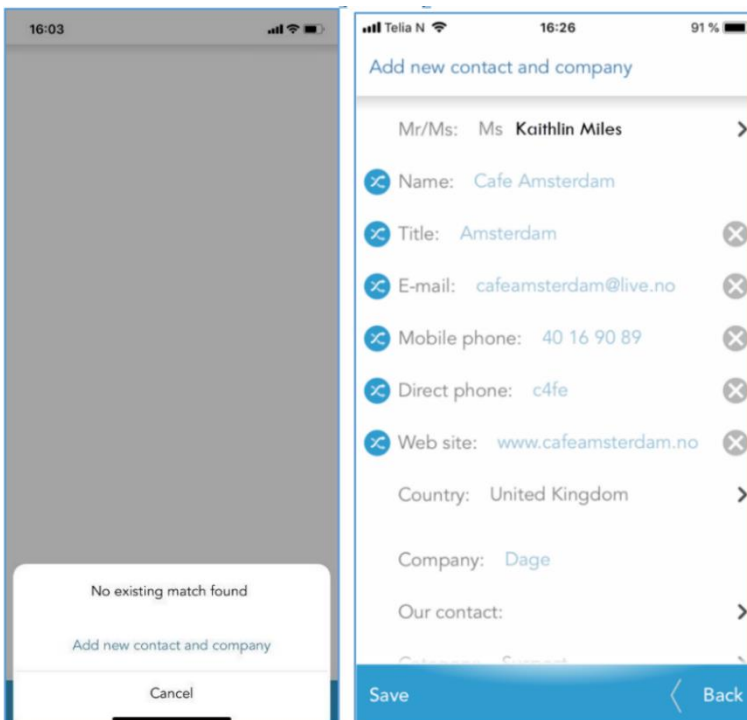


Another feedback given to us by users was that the “edit” option were not easily found.

Now, instead of being a menu option hidden under tasks it is a separate icon placed prominently placed in the bottom-center.

If you want to edit a saved appointment and make changes (for example to the time, place or participants and so on) you click on the icon and then you can edit whatever you need to, in your appointment screen then click Save.

Pocket CRM – More optional fields available in the business card scanner (9.0.4)

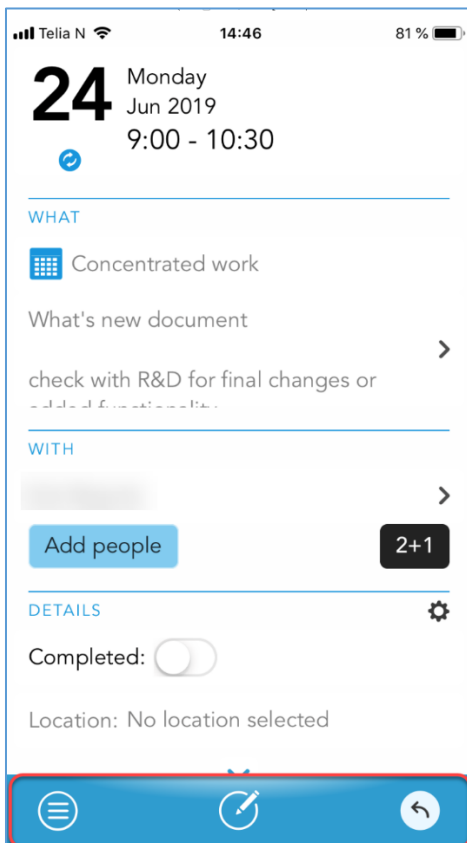


You can now register more information when you scan a new business card.

When you click on **New**, in the bottom-left corner, you can choose to **Scan a business card**. Next choose **Add new contact and company**.

Once you’ve taken a picture of your business card, SuperOffice will register all the fields it recognizes. Once you’ve removed the field you do not want to register you can press **Save**.

Pocket CRM – The clickable buttons at the bottom are larger (9.0.5)

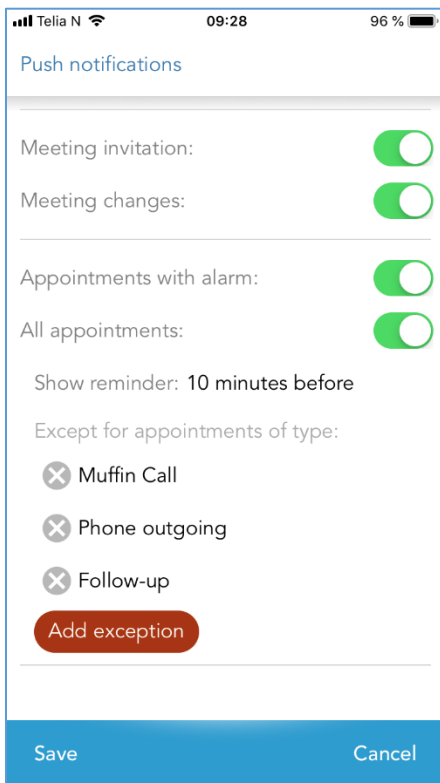


There are a number of design changes to improve the usability of Pocket CRM

Here are some of the key changes: The clickable buttons at the bottom of the screens are now larger, so it's easier to press them. new icons to make it easier to navigate through the different modules.

All these changes help to increase the usability of your mobile app.

Pocket CRM – Choose which activity types should not trigger a notification (9.0.7)

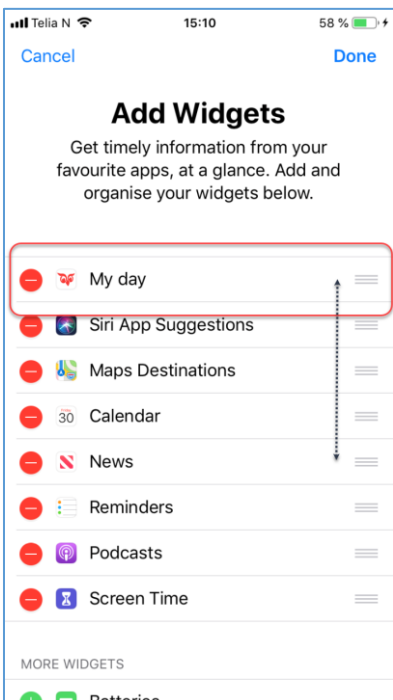
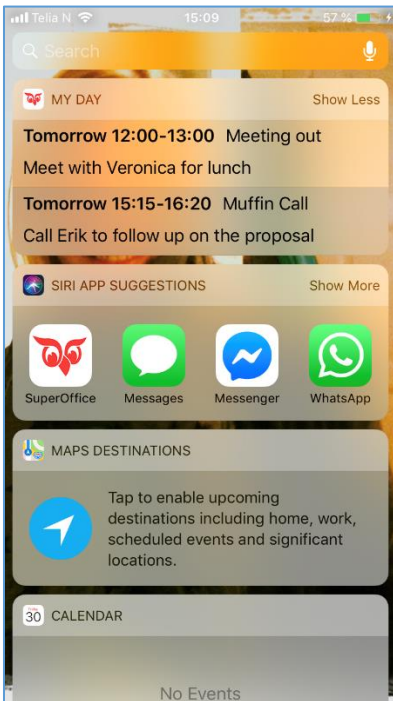


In Pocket CRM you can now select which activity types should prompt a notification to warn you about this activity and which activities shouldn't.

In the **Settings** menu you can add all the activity types you don't want to receive a notification about in your Diary.

This way you can personalize your notifications and you won't get disturbed by notifications you do not want or find helpful.

Pocket CRM – Get an overview of all your appointments in the next 48 hours with “My day” (9.0.7)



Pocket now has its own widget for iPhone users called “**My day**”.

A widget is an app extension that makes information for apps available even if you haven't opened them. Like Siri app suggestions or the weather forecast for example.

You find your widgets when you unlock your iPhone and swipe to the right until you get to the screen that is furthest left. Here you'll find all your widgets. Scroll all the way to the bottom of the screen to find the **Edit** button.

When you click the Edit button, you get to the **Add widget** screen. Find My day in the list of available widgets. You can add the **My day** widget by pressing the plus logo.

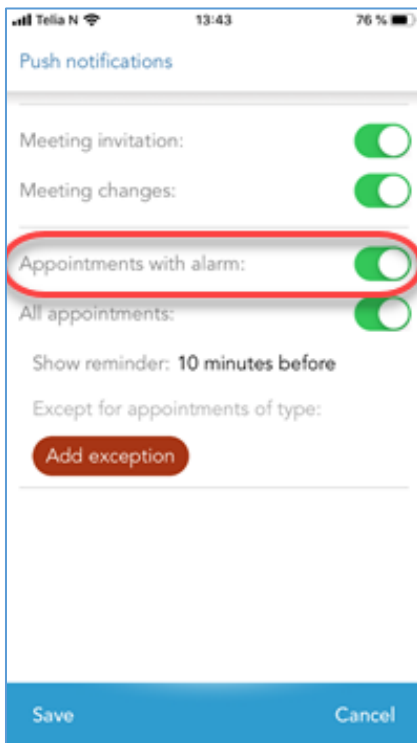
This adds the My day widget from Pocket CRM. You can also change the order of your widgets by pressing and holding the widget on the right hand-side. You can now move the widget up and down to change the order in which they are visible.

The SuperOffice App extension will show you all your appointments for the next 48 hours.

Getting an overview of all the tasks ahead of you has never been this easy.

The My day widget is only available for iPhone users.

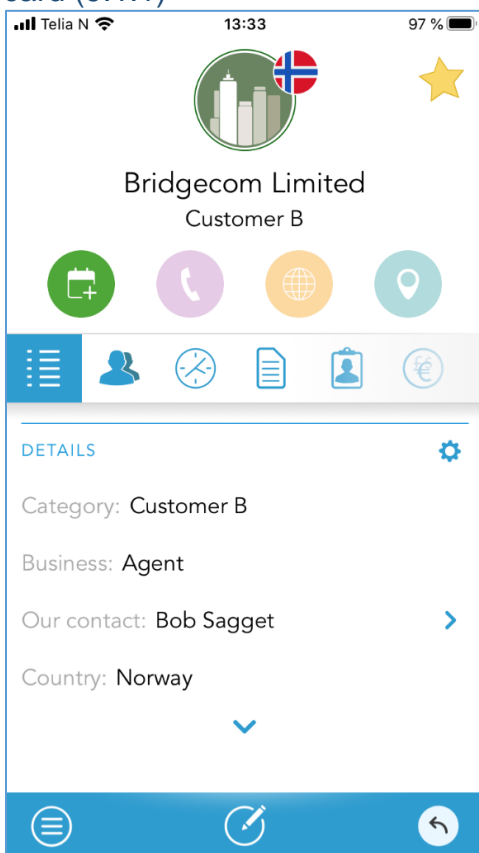
Pocket CRM – The app now supports alarms for iOS 13 devices (9.09)



Pocket CRM has been updated for iOS 13.

This means that alarms are now supported for users who have upgraded their mobile device(s) to iOS 13 as well.

Pocket CRM – Improved design on the Company card (9.1.1)

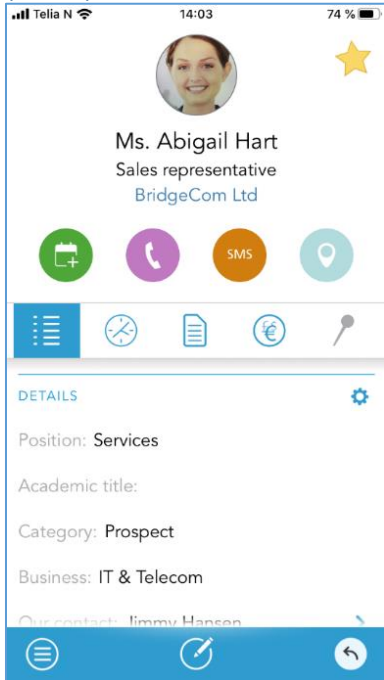


The Company card has gotten a new design which will improve the user experience.

The new design makes it easier to access information, and we've added the four quick buttons at the top of the Company card to make it easier to book an appointment, call a company, visit their website and calculate your route and travel time when you want to visit them.

In addition, you can now access and create projects from the Company card. And like before, you'll have access to all the contacts, activities, documents, sales and interests.

Pocket CRM – Improved design on the Contact card (9.1.1)

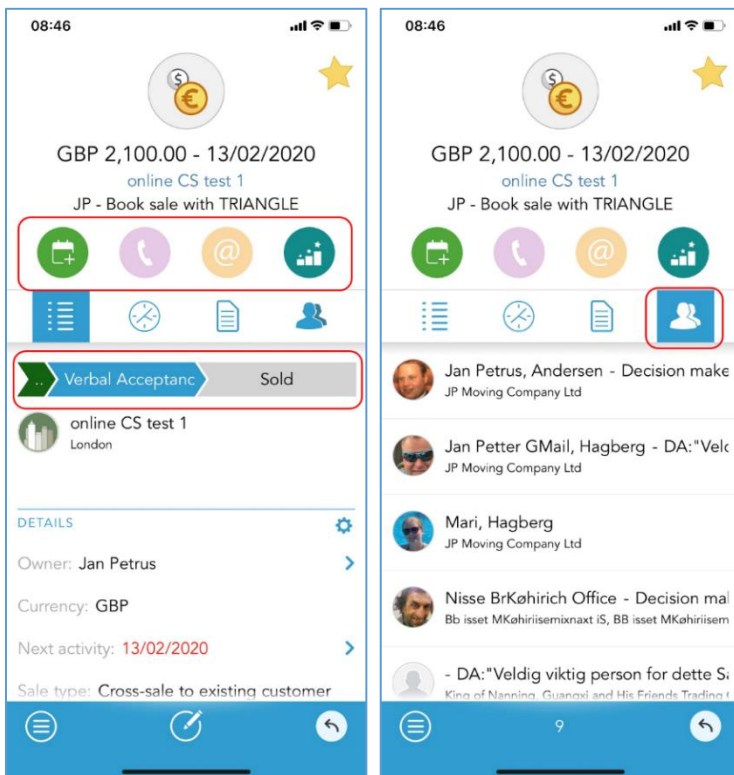


The **Contact card** has gotten the same new design as the Company card.

The new design makes it easier to access information, and we've added the four quick buttons at the top of the Contact card to make it easier to book an appointment, call a contact, SMS a contact, or to calculate the route and travel time to visit a contact.

In addition, you can now access and create projects from the Contact card. And like before, you'll have access to all the activities, documents, sales and interests.

Pocket CRM – Improved design on the Sales card (9.1.4)



The **Sales** screen has been redesigned to help you better manage your sales opportunities from your mobile.

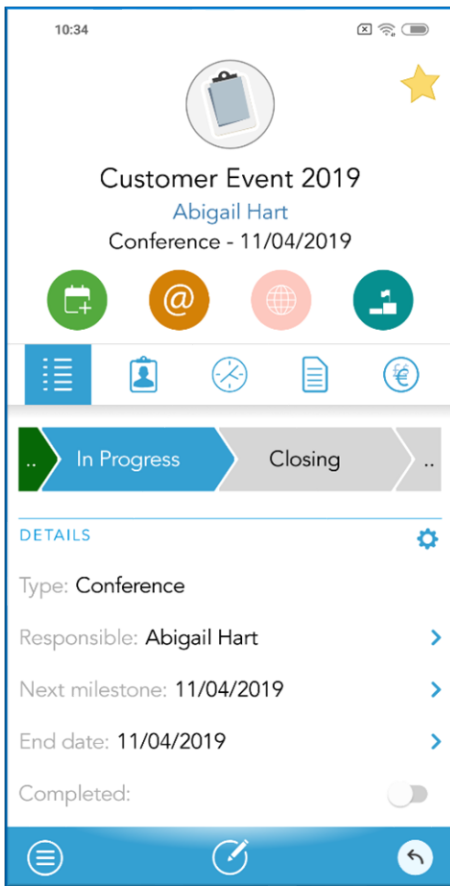
First, new **action buttons** have been added at the top of the Sales card to make it easier to book your closing meetings, call a contacts, send an emails, and see your sales dashboard.

A visual presentation lets you see exactly what **Sales stage** in the sales process you are. By clicking on the current stage, you can change the status of your sales opportunity.

You also have full access to all the activities and documents connected to this sale.

And finally, a new tab for **Stakeholders** has been added to the Sales screen where you'll see all the people involved in the sales opportunity. You can easily access their Contact card, from the sale by clicking their name.

Pocket CRM – Improved design on the Project screen (9.1.5)




The **Project** screen has been redesigned to help you better manage your ongoing project directly from your mobile.

First, new **action buttons** have been added at the top of the Project card to make it easier to book your next status meetings, call project members, send emails, and move your project status to the next.

A visual presentation lets you see exactly what **Project stage** in the project guide you are. By clicking on the current stage, you can change the status of your project.

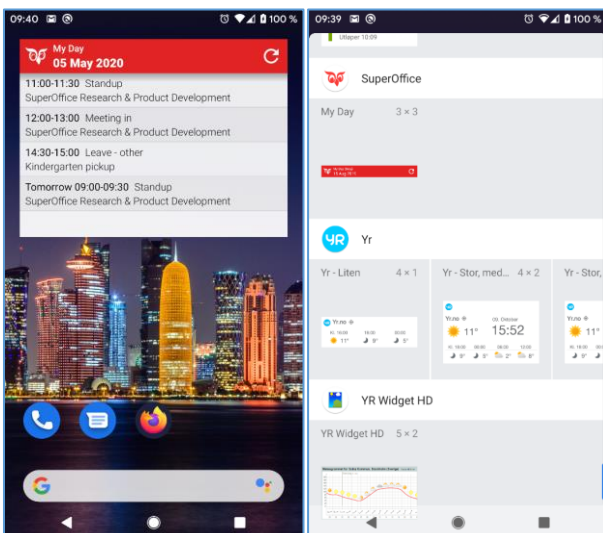
You also have full access to all the activities and documents connected to this project.

The visible fields under **Details** can be configured to fit you when you click on the  icon. Choose which fields you want to see and drag and drop these in your preferred order.

And finally, a new tab for **Sales opportunities** has been added, where you'll see all sales registered in this project.

You can easily access their Contact card, from the project by clicking their name.

Pocket CRM – See activities for the next 48 hours with the “My day” widget for Android users (9.1.6)



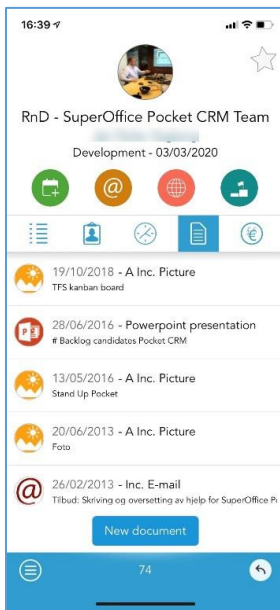
For Android devices we have introduced the **SuperOffice My Day widget** that you can add to your home screen.

To add the SuperOffice widget, tap and hold an empty space on your phone. Then, tap Widgets. Next you can touch and hold a widget to see the images of your home screens. Slide the widget to where you want to it and save it by lifting your finger.

The SuperOffice My day widget will show you all your appointments for the next 48 hours.

Getting an overview of all the tasks ahead of you has never been this easy.

Pocket CRM – Improved design on the Document screen (9.1.6)



The **Document** screen has been redesigned to provide better access to your documents available in a Company, Project or Sales screen directly from your mobile.

You can easily see what type of document you are looking from the word, excel, PPT, and PDF logos.

Clicking on any document will **automatically open** the document in the preview screen, where you can see the document directly on your mobile phone.

If your mobile isn't able to open the document, you will be given the option to select another application to open the document in.

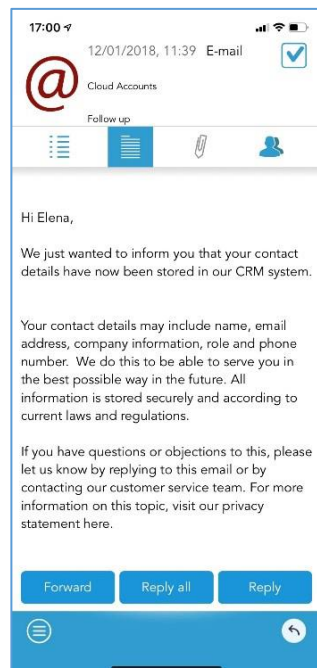
Please note: Android users will only be able to preview images!

If the document is large and takes some time to download, this will be displayed whilst waiting, as will the option to cancel the download should the download take too long.

Once opened it can viewed with an option for showing the document in **full screen**, collapsing the top banner to give more screen space.

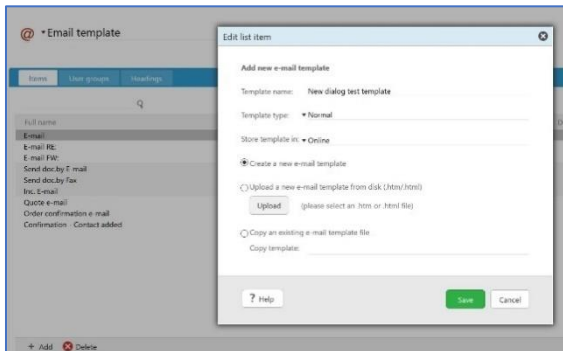
At the top of this preview screen you'll see three useful buttons that allow you to share the document, email the document, and view the details of the document.

With the new document screen it's easier to see, edit and share all the documents you've got save in SuperOffice CRM.



New and improved Mail Link

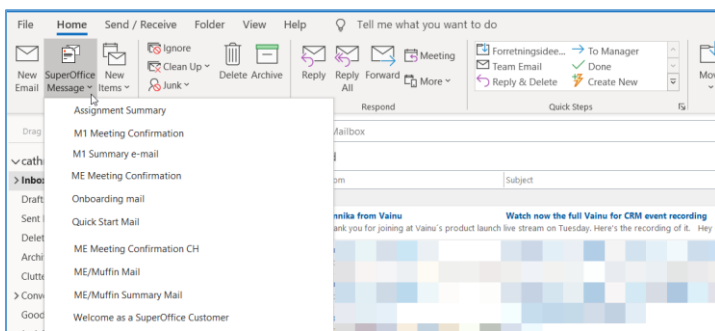
Mail Link – Support for predefined e-mail templates (8.5 R11)



It is possible to create an **e-mail as a template** inside Settings and maintenance.

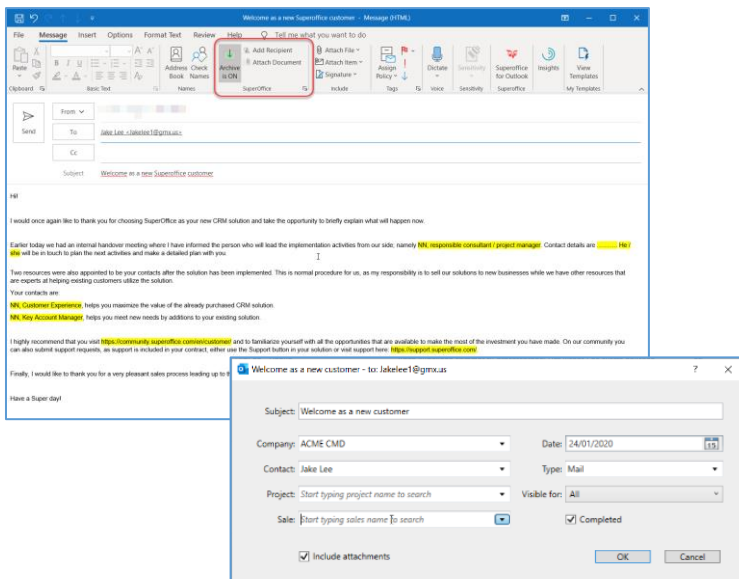
The Mail Link will ensure that any e-mail template that is available for a user inside SuperOffice CRM will also be available as template options directly from within their Outlook.

Inside Outlook, a new button will appear named **SuperOffice Message** that directly accesses and opens templates as a new mail.



When selecting one of these templates, the content will appear in a new mail, allowing you to fetch recipients from SuperOffice CRM and send.

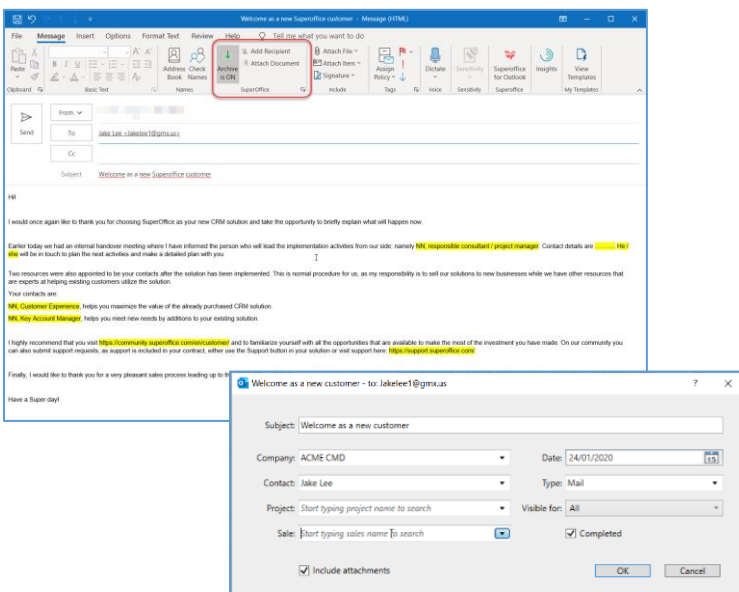
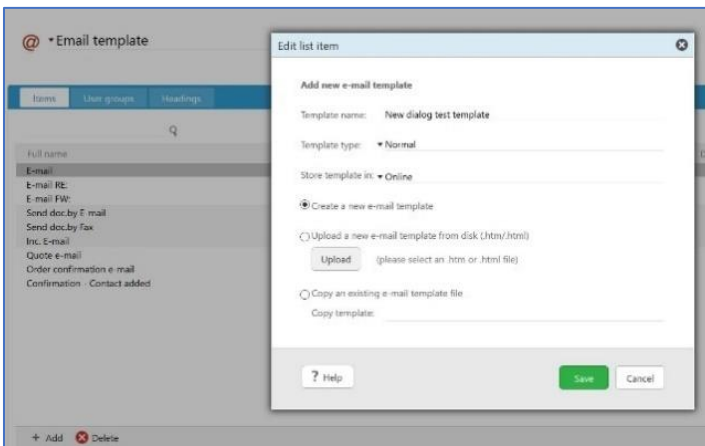
The e-mail subject field and signature will follow that specified in your e-mail template.



The mail will be archived in SuperOffice if you have activated the archive button in Outlook when sending your mail.

For more information about the e-mail templates, see above under new features in Settings and Maintenance.

Mail Link – Support for incoming and outgoing invitations from external (8.5 R14)



Earlier this year we released SuperOffice 8.5 R11 which contained pre-defined e-mail templates for Online users of SuperOffice CRM. These pre-defined e-mail templates are also available for Onsite users.

When meeting invitations arrive and are accepted via your inbox, these will also be available in your Outlook calendar.

To enjoy a full synchronization between your SuperOffice diary and Outlook calendar, the best option is to use the Synchronizer for SuperOffice add-on. When using this add-on, a number of features in the SuperOffice invitation dialogue is automatically switched off to avoid duplications.

If you do not use the Synchronizer for SuperOffice add-on or in the case where you are using the SuperOffice inbox primarily or in combination with your Outlook Mail Link, incoming and outgoing invitations from external people is now supported.

With SuperOffice 8.5 R14 you can send and receive invitations from both internal and external people. Which means you only have to save and accept your meetings once.