SuperOffice AS

What's new in SuperOffice 9.2

SuperOffice AS – Research and Development

Updated: 20 September 2021

SUMMARY OF HIGHLIGHTS

Discover the new features, functionality and design of a **brand new generation** of SuperOffice CRM – SuperOffice G9.

The next generation comes with big changes to the entire CRM platform, employing new technologies, as well as introducing changes to the UI and UX design – all to improve the overall user experience and meet evolving business needs and challenges.

Customers wanting to experience SuperOffice G9 must note the following:

- SuperOffice G9 is **only** available on SuperOffice 9Onsite **Subscription** Agreements. Customers with an Onsite Buy Agreement need to **convert** to an Onsite Subscription Agreement before they can upgrade to SuperOffice G9.
- SuperOffice G9 is **only** available as a **web** application. SuperOffice 9 is not available on the SuperOffice Windows app.
- Internet Explorer 11 is no longer supported.

The first release of G9, SuperOffice 9.1, offers intuitive design combined with new ways to maximize and utilize your screen space. SuperOffice 9.1 also contains more options to organize and configure the way you view your customer information.

Details of the new features are outlined in this document.

SuperOffice 9.2 – is the second major upgrade of the SuperOffice CRM version 9 platform.

The main change in this version is the new and improved way of searching for customer information. In addition to this, we have restructured our customer facing apps under a new Customer Engagement Center. As a result, we now offer Chat, Forms, and Customer Center as add-ons in our licensing system.

Details of the new features in 9.2 are also available in this document and are as follows:

- 9.2 R01: A better way to search and the Customer Engagement Center
- 9.2 R02: Edit incoming external invitations, New previews in Side panel, New freetext result panel
- 9.2 R03: Hide navigator buttons, Dark mode on Mobile CRM, Forms with pre-filled check box options
- 9.2 R04: Video meetings, new preference, Google analytics specification
- 9.2 R05: Drag & drop editor on Mailings, Today, this week buttons in Diary, Forms input
- 9.2 R06: Preview additions for Mailings and Contact, Form changes, Mobile additions
- 9.2 R07: Customer language, Join meeting on Mobile
- 9.2 R08: Forms, Chatbot API
- 9.2 R09: Export to Excel update
- 9.2 R10: Forms, Join video meeting from Alerts on Mobile
- 9.2 R11: Bounce management, Form respons, Chat transfer for managers
- 9.2 R12: Chat, Pocket CRM without support of new SuperOffice versions

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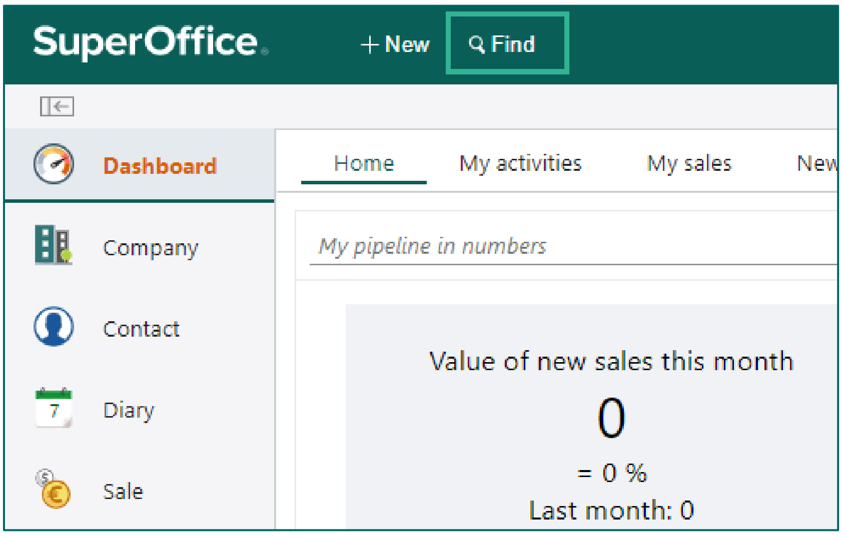
CRM – A better way to search for information (9.2 R01)

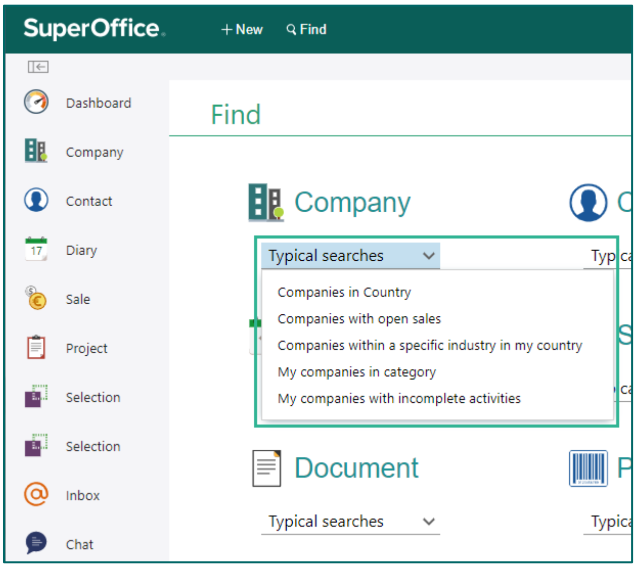


Instead of having two ways to look for information, depending on whether you are looking for one piece of data (previously via Find) or a list or series of data (previously via Selection), you now use the same method for both.

You now start all searches with the Find button. Find gives you the opportunity to search across all the fields in your database and pull out single or a series of data.

If you are creating a new selection, start by clicking the Find button. Next add the search criteria to find the information you need. Once you are satisfied with the results, you can choose to save your search either as a dynamic or static search.

CRM – Pre-defined searches (in Find) (9.2 R01)

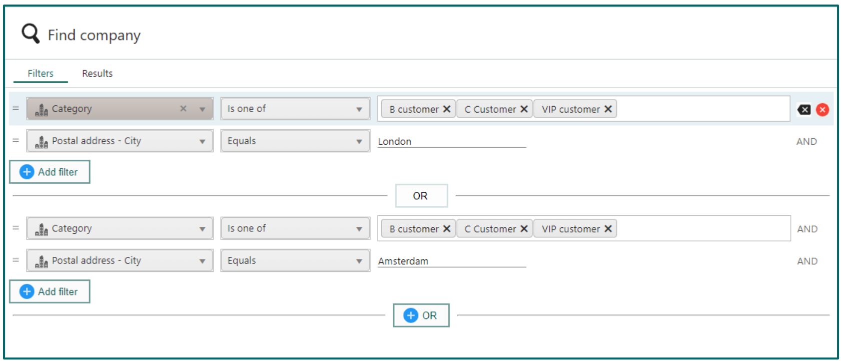


The new Find feature contains a wide range of typical searches.

Choose from a range of pre-defined search criteria for each category of data to get results fast.

You can add additional criteria or amend the pre-defined criteria to improve your search results.

CRM – Search using AND/OR functionality (9.2 R01)



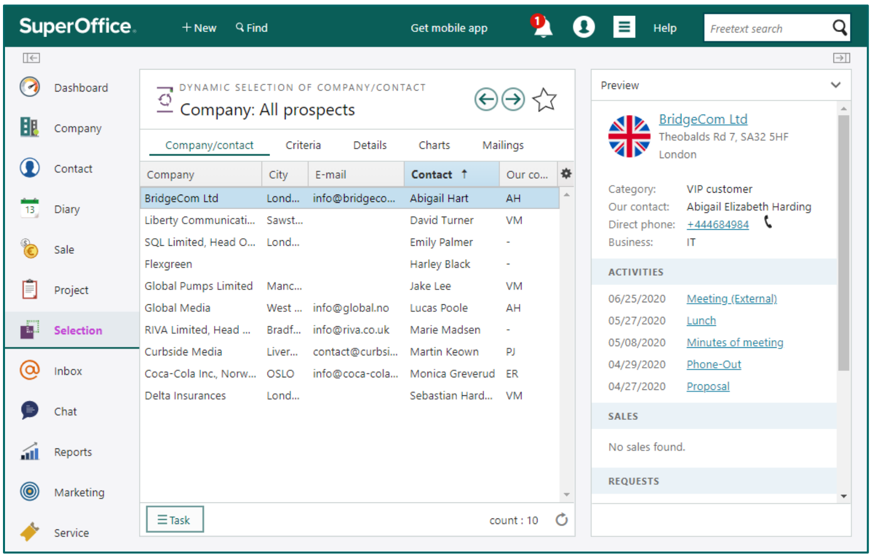
In addition to *narrowing* your search by adding more criteria, using AND, you can also *broaden* your search using OR.

The OR function allows you to search for two different types of data within the same search.

For example, you can search for customers who have bought either product A OR product B.

This new feature gives you more flexibility to search for information in your SuperOffice database.

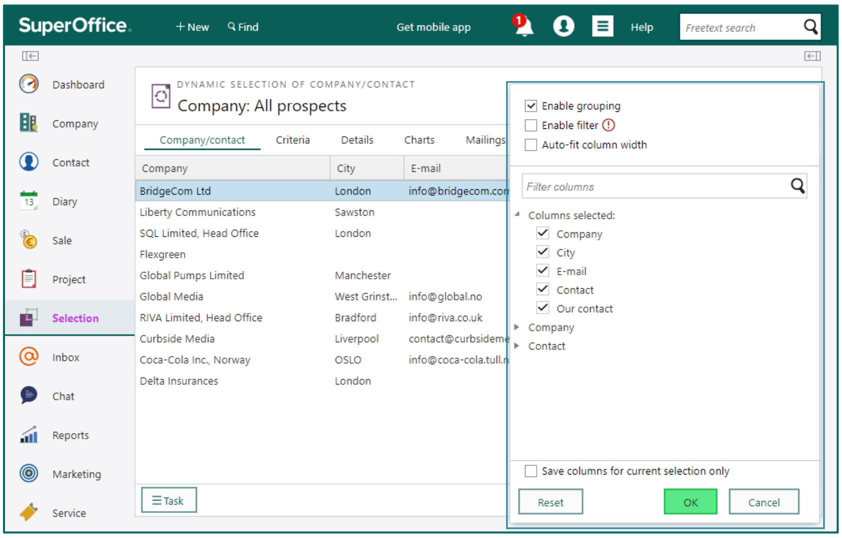
CRM – Preview and navigate between search results (9.2 R01)



The side panel, which was introduced in SuperOffice 9.1, gives you a preview of the data in your search results.

This allows you to scan and go through your search results in a fast and efficient way.

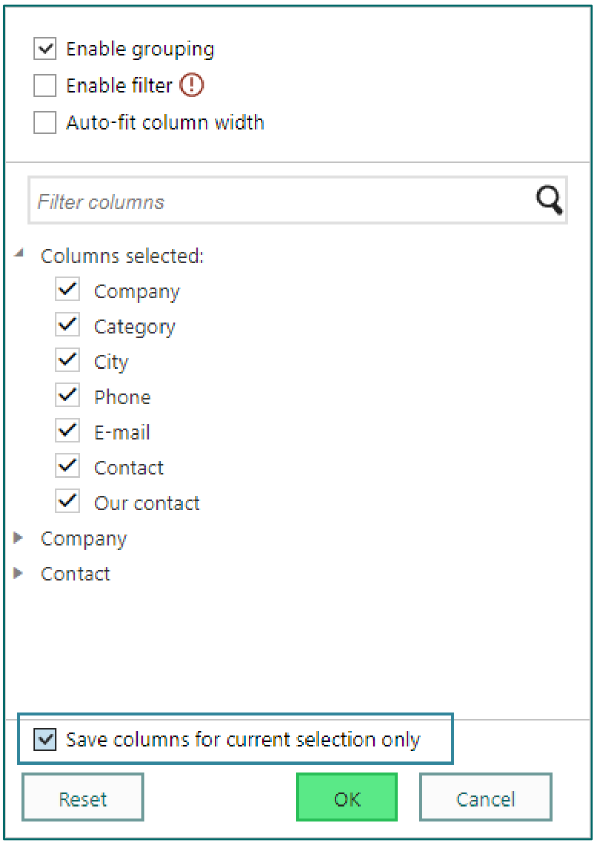
CRM – Sort, group and organize the search results (9.2 R01)



The new ways to organize, sort, and group lists, which was introduced in 9.1, now also applies to the search result screen.

You now also have the flexibility to maximize the screen space for your search results. Use the entire length of your screen and choose whether to collapse the navigator menu and/or the side panel.

CRM – Save the columns for this Selection (9.2 R01)

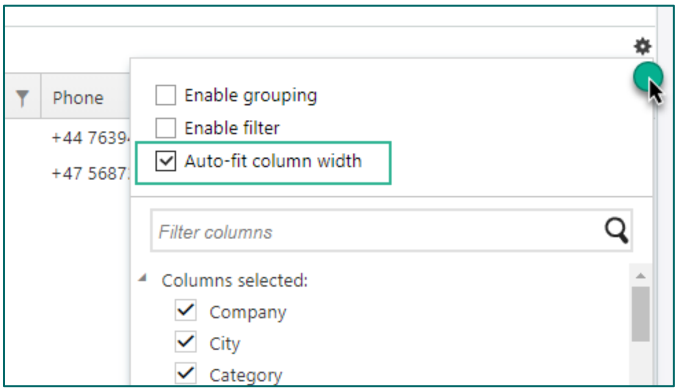


New to this version is the ability to save the columns used for a Selection.

Ticking this option ensures that the columns remain visible for everyone who opens this particular Selection.

This saves other users of the Selection time to find the most relevant columns to view and the creator of the Selection more control when sharing the findings.

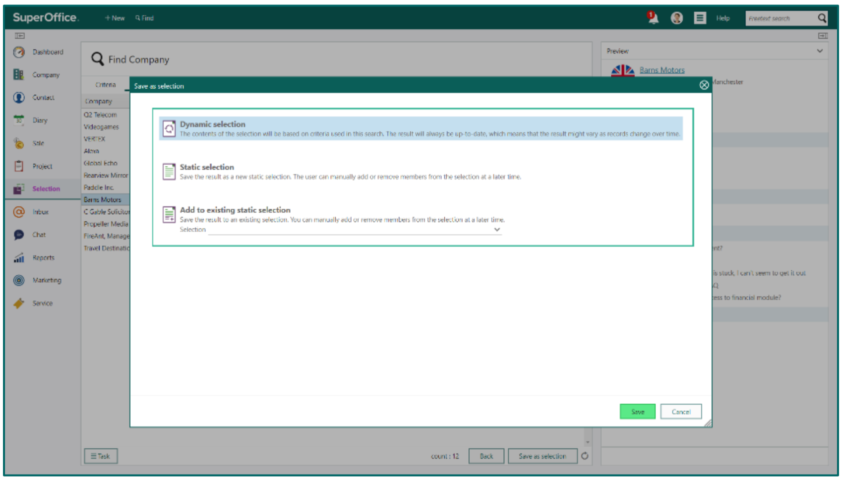
CRM – Auto-fit column width in the results screen (9.2 R01)



The number of columns, order, and sort is available for a user to define (see above). It is now possible to let the system auto-fit the column width in the results screen archive.

When this option is selected, the columns are locked for further adjustments until the option is unselected.

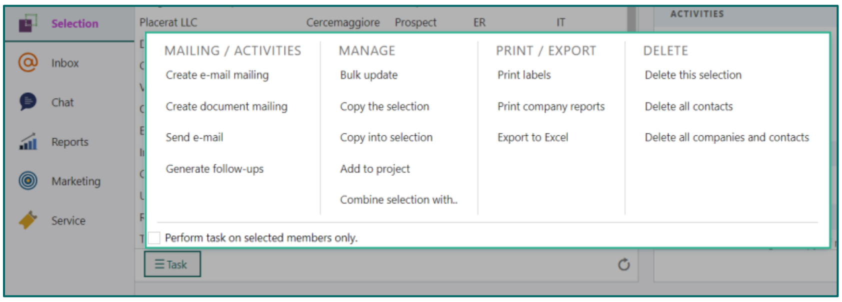
CRM – Save search results as a Selection (9.2 R01)



When you have found the information you need, you can choose to save your search as a dynamic or static selection using the Save as selection button.

You can choose to use the preview screen in the side panel to see more detailed information about the data you found.

CRM – Improved Task menu options (9.2 R01)

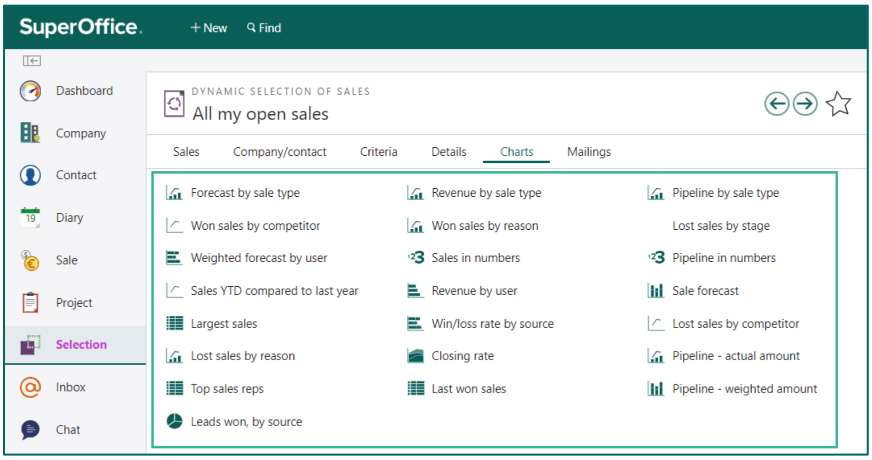


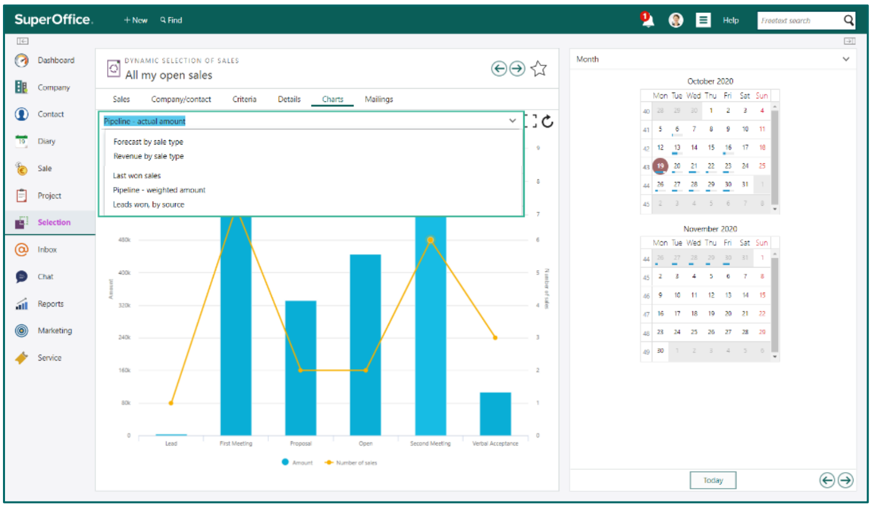
The task menu has moved from a tab on the top to the bottom left corner.

The presentation of **Task** options has been improved by grouping the different types of tasks together, to make it easier to understand and use.

Note that the task to combine a selection with another selection is now available in the Task menu.

CRM – Present information lists in Charts (9.2 R01)





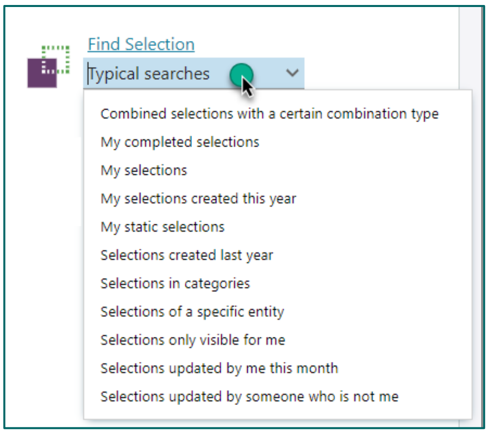
Different types of search results can be presented in charts.

Chart options are available, and you can choose the information you want to see from a list of options.

The type of charts will automatically vary according to the type of data you have in your search result.

You can also change the chart and information you visualize within the same Selection – allowing you to analyse and view your results from different angles.

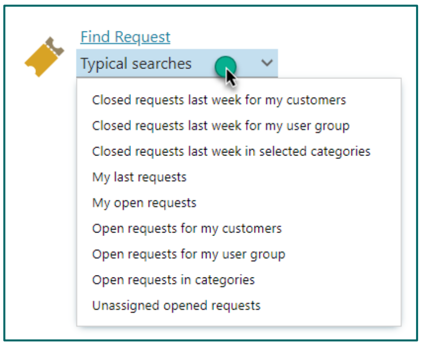
CRM – Search for selections and manage existing selection (9.2 R01)

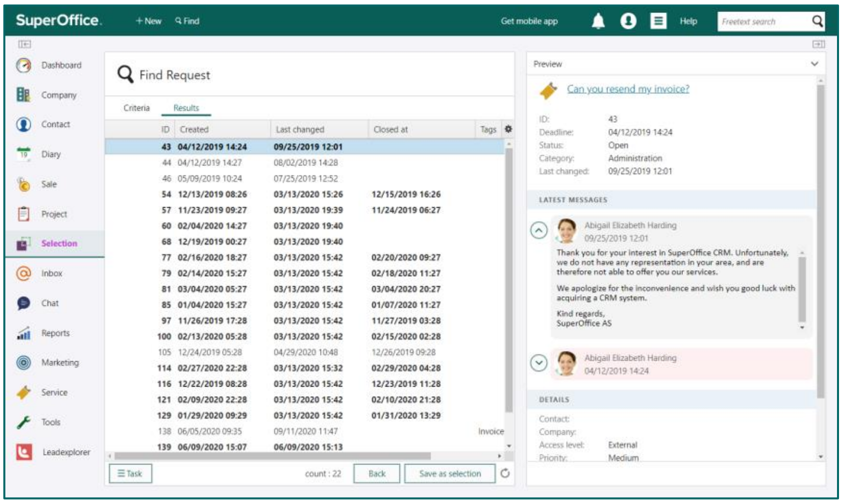


New is the possibility to search for Selections using different search criteria, including when a Selection was created and/or last used.

This opens up for better organizing of current selections. For example, deleting old and unused Selections makes it faster to find the ones that matter.

CRM – Request searches available for all (9.2 R01)

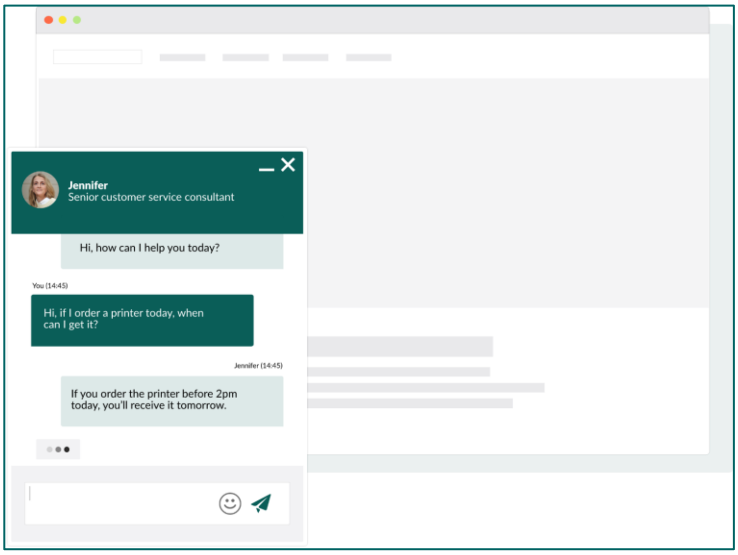




The ability to search Requests is available for all and not only those who are users of SuperOffice Service.

The search results are presented as a list with more details available in the **Preview Side panel**. Users with access to SuperOffice Service (users with a Service and Complete user plan) can also open the requests in Service, from the results screen, and continue responding to the ticket directly.

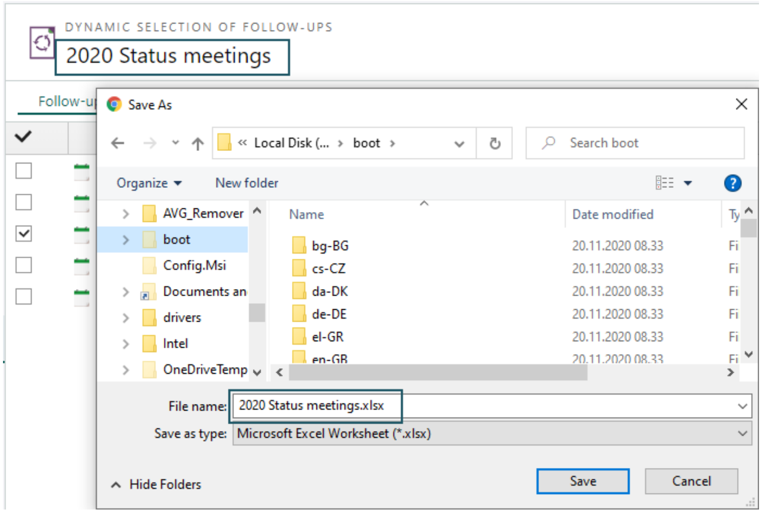
CRM – Chat available as a separate add-on (9.2 R01)



Chat has been available to all users of Sales, Marketing, Service and Complete and will continue to be available to all existing users who currently have access to Chat.

For new customers of this version of SuperOffice CRM, or users on a version of SuperOffice CRM that does not have Chat, the feature will be available as a separate add-on as part of new Customer Engagement Platform concept.

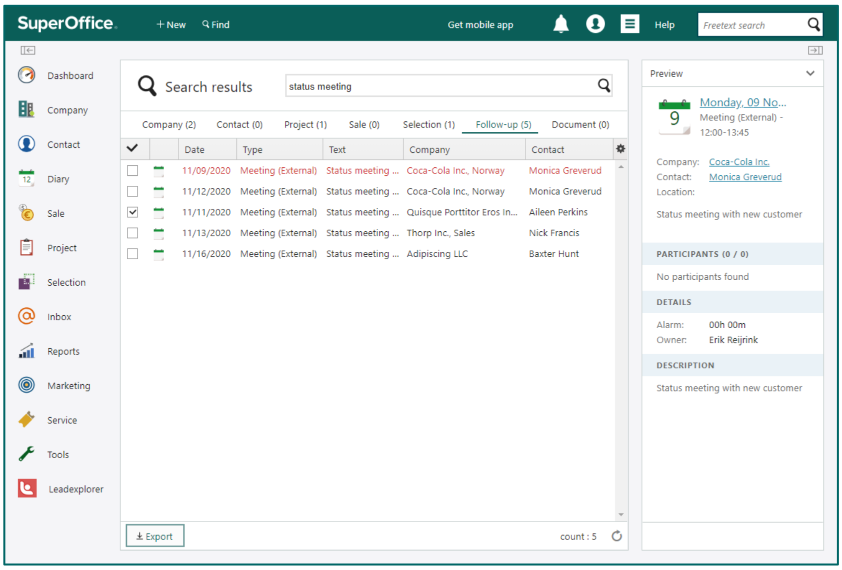
CRM – Selection export to file with selection name (9.2 R01)



When exporting your selection to excel, the name of the file will be the same as the selection file.

It makes it easier to locate your file after saving it.

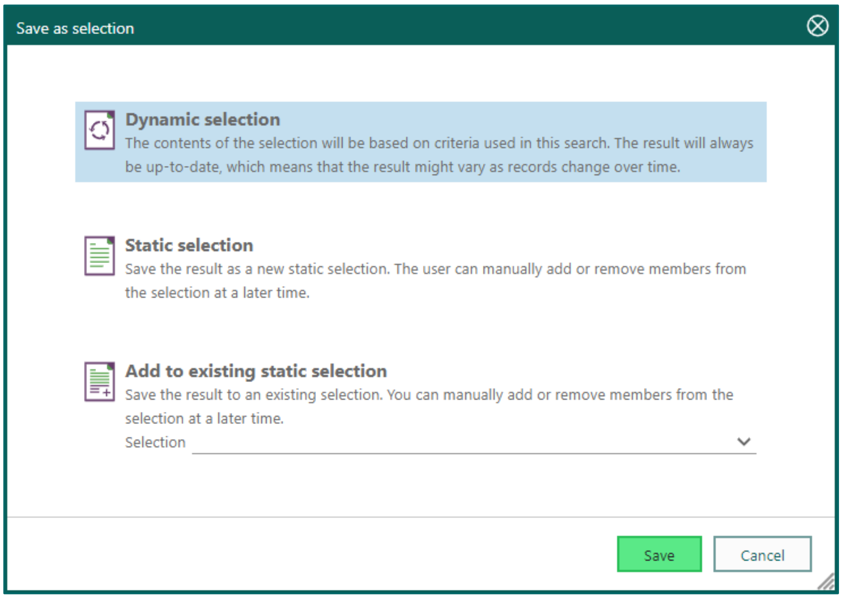
CRM – New Freetext search page (9.2 R02)



When using the **Freetext search** in the top right corner, your results will be presented in full screen view.

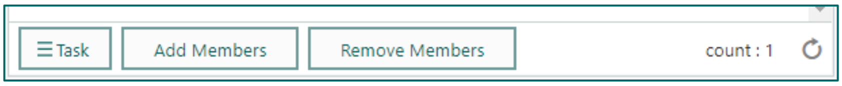
Your results are organised into different tabs, and you can use the **Preview Sidepanel** to see more information on selected items.

CRM – Double click on options in the Save as selection dialog (9.2 R02)



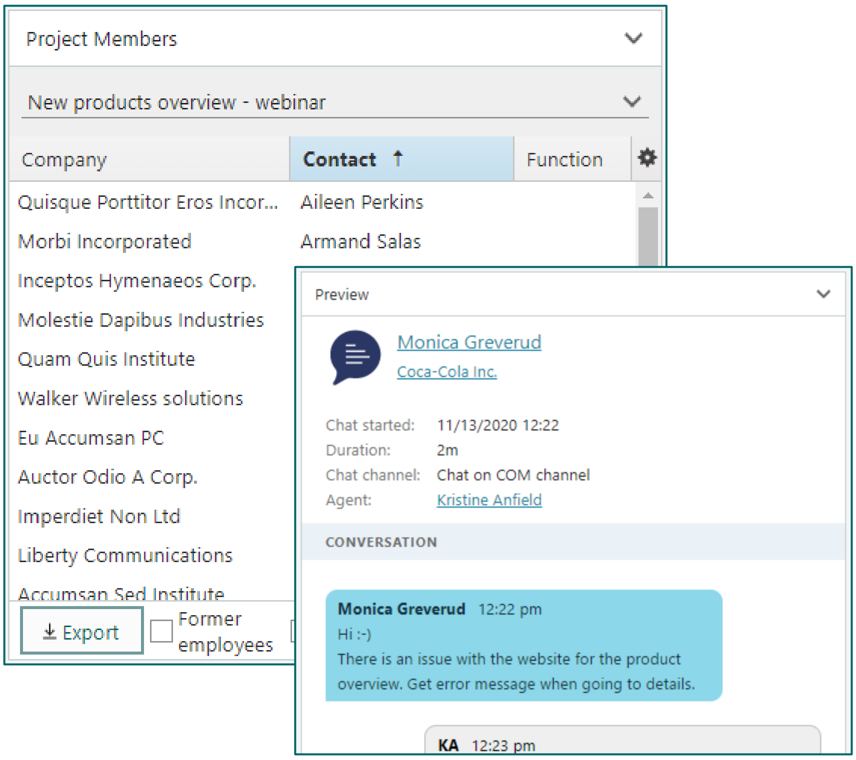
When you save a selection, you can double click on the different options in the dialog or select the option and then click the Save button.

CRM – Static selection with Add members button (9.2 R02)



On a static selection you can use the Add members button, where you search with criteria and add the results you get on given criteria.

CRM – Side panels with updated info (9.2 R02)



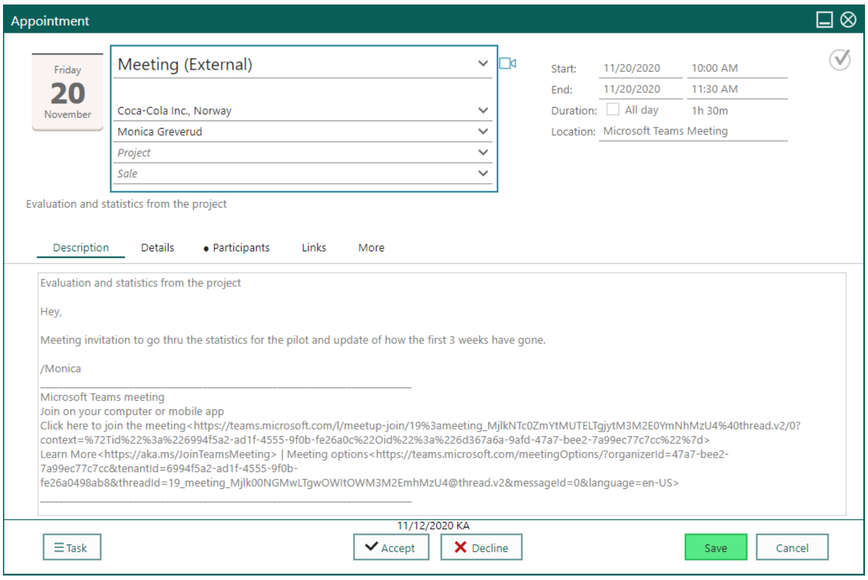
Side panels for different features have gone through some revisions and changes.

The preview is updated for:

- Chat
- Form
- Mailing

Meanwhile, Project and Selection member dialogues have a fresh new look.

CRM – Edit of external meeting invitations (9.2 R02)

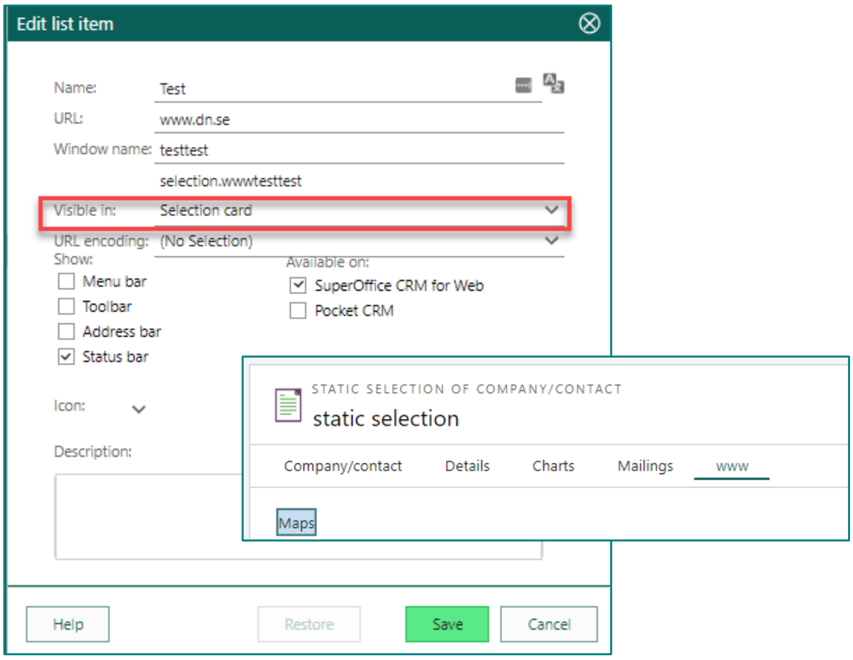


When you accept an **invitation** from an **external person**, you can change some fields in the appointment to make it easier to save it with the right information.

Fields such as Appointment type, Company, Person, Sale and Project can now be edited.

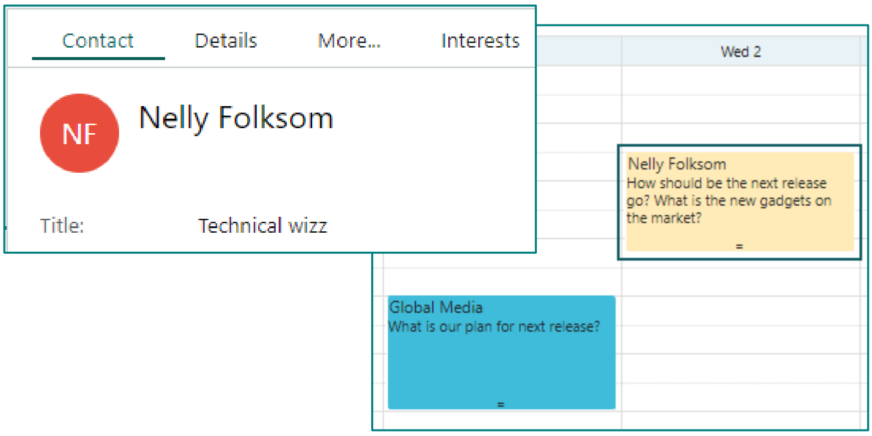
Any user (with sufficient rights) can change the fields on the appointment, and this will be shown for all participants.

CRM – Selection with web panel support (9.2 R03)



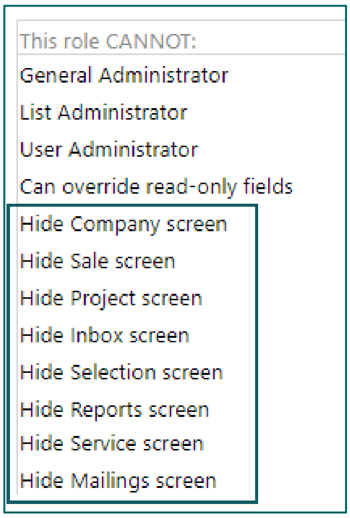
Web panels are now supported in Selections, so you can start using the web panels again.

CRM – Diary shows person name no company is linked (9.2 R03)



Appointments with persons that are not connected to a company, will show the person's name instead of the non-existing company.

CRM – Hide more navigator buttons (9.2 R03)



It is now possible to hide Reports, Service, and Mailing from the navigator.

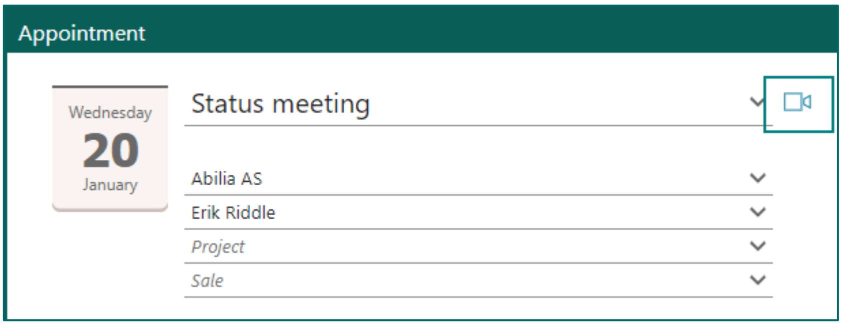
This will create a cleaner look and make it easier for those that don't use the functionality behind the buttons.

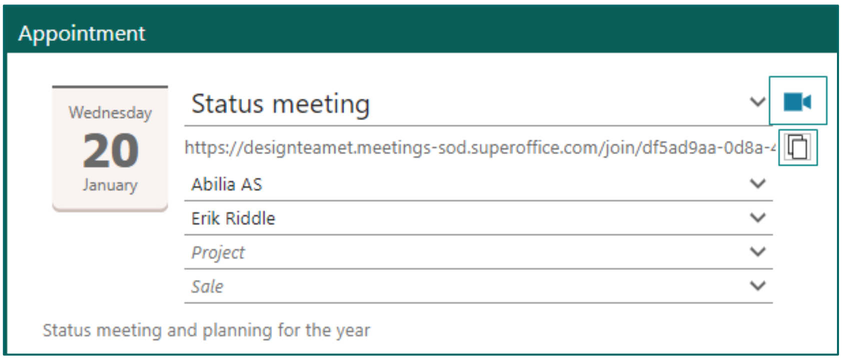
CRM – Prefix changes on date/time (9.2 R03)

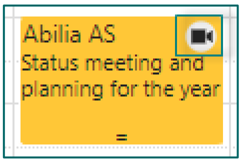
Since serialization of arbitrary objects is somewhat problematic – that's why we have JSON, BSON, XML, ASN.1 and what-have-you – we decided to make our own, self-identifying format for archive values. In our code it lives in the beautifully named class CultureDataFormatter, and we use it all over the place, particularly in the archive providers. Both values going out through DisplayValue and values coming in view ArchiveRestrictionInfo.Values[] use this format.

Also check out the blog post:
https://community.superoffice.com/en/developer/blog/changes-in-91r3-date-time-and-datetime-in-archive-providers

CRM – Video meeting straight from the appointment (9.2 R04)







You can click on the Video meeting button in an Appointment dialog and instantly create a URL for where to hold your video meeting. This URL is sent in the invitation to internal and external participants, so it's easy for everyone to meet in the correct place.

The diary will also show an icon in the appointment, to highlight that this is a video meeting.

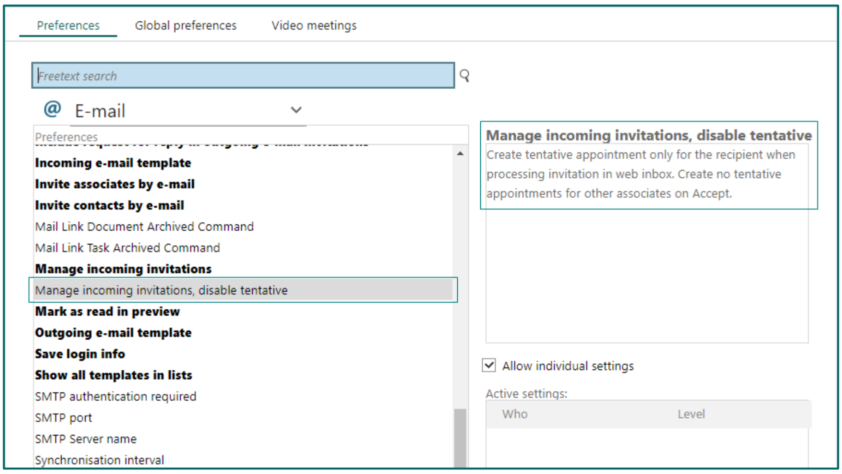
You must set up which video system your company is using. This is done in Settings and maintenance by admin.

We support the following video conferencing providers:

- Zoom
- Microsoft Teams
- Google Meet
- Cisco Webex
- Jitsi Meet (free to use, no subscription needed)

https://community.superoffice.com/en/customer/learn/settings-maintenance/general/configure/video-conferencing-provider

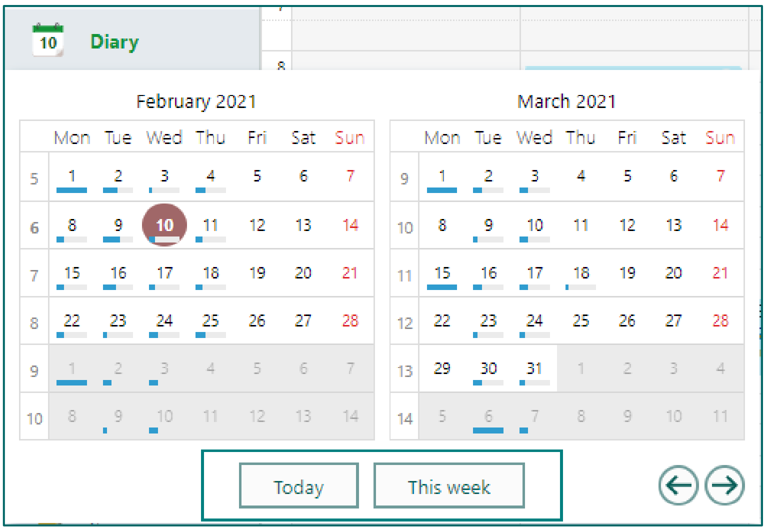
CRM – Preference – Turn off creation of tentative appointments (9.2 R04)



When invitations from externals are processed by the Inbox or the MailLink, the default setting is set to create tentative bookings for all participants included in the invitation that are stored in SuperOffice CRM.

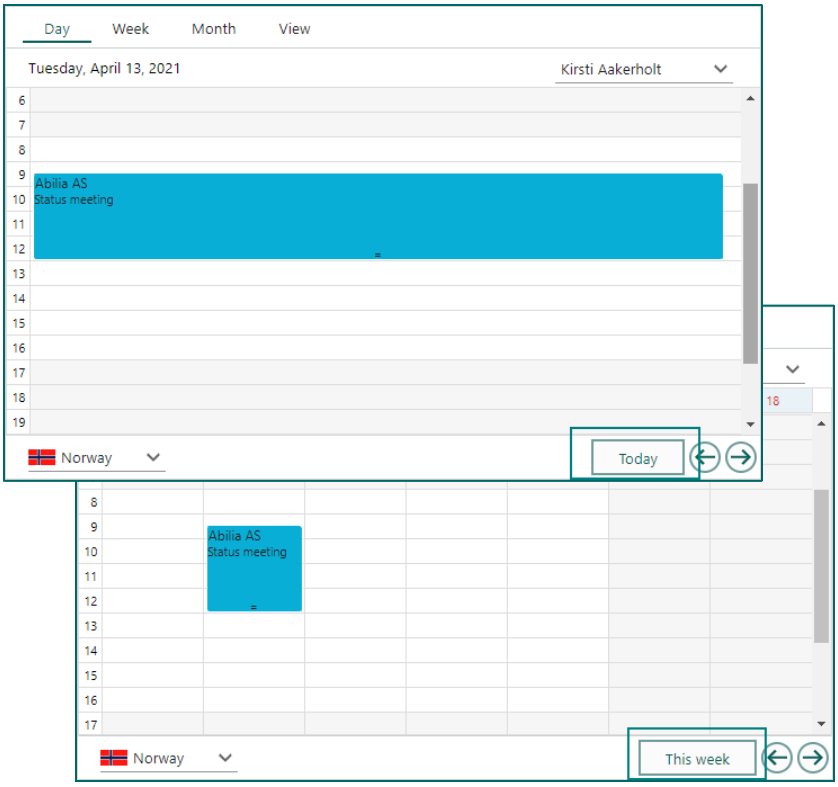
An option, **Manage incoming invitations, disable tentative**, in **Preferences** allows the system owner to disable the creation of tentative bookings for all other associates, so that an appointment is only created for the owner of the Inbox. With this preference on, only the associates with a working Inbox or MailLink will get the booking in their diary.

CRM – Diary navigator with Today & This week button (9.2 R05)



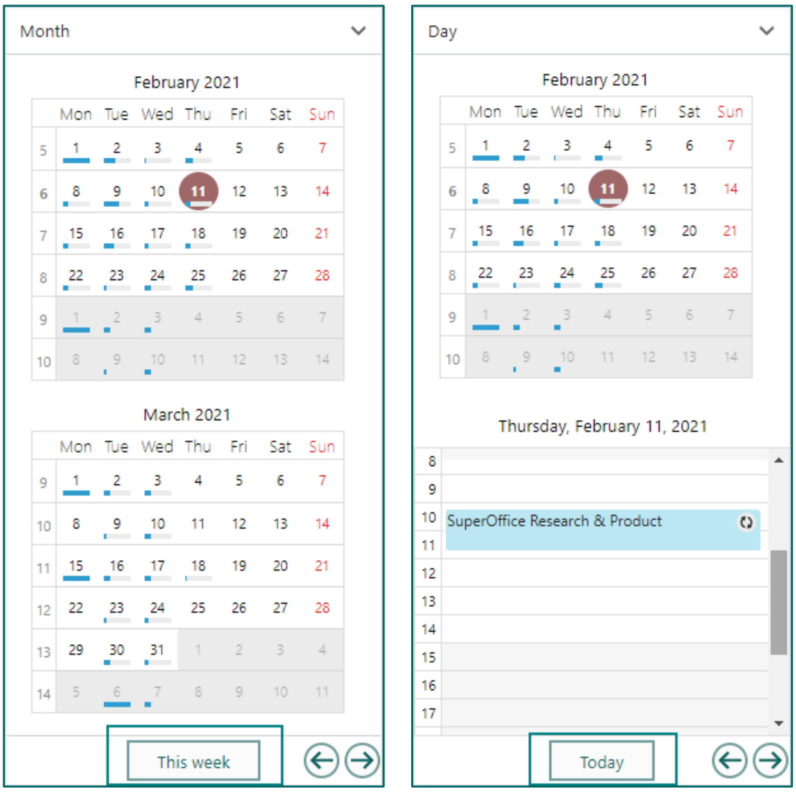
In the navigator for **Diary**, the month overview has both **Today** and **This week** buttons, making it easier to choose the view you would like directly in Diary.

CRM – Diary with Today or This week button (9.2 R05)



When you have **navigated** too far from this week or today, it's easy to click on the buttons **Today** and **This week** to get back to the tasks today.

CRM – Side panel Month & Day view with Today / This week button (9.2 R05)



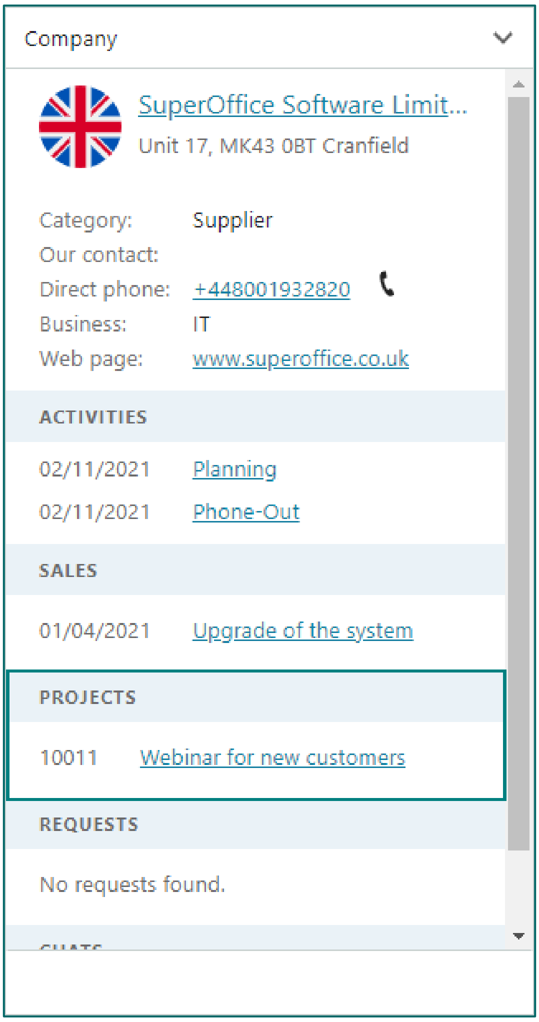
On the side panel **Month** and **Day** views, you have buttons that take you back to the current day or week in your Diary.

- Month card → This week
- Day card → Today

This is a quick navigation to get todays or this week's overview.

It's also an easy way to get your focus back on today.

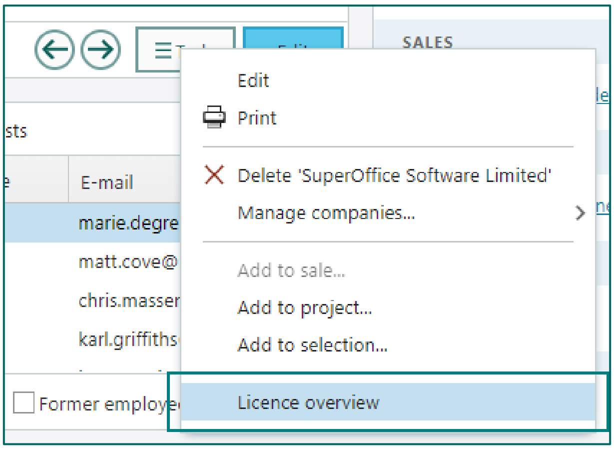
CRM – Side panel Company view with Projects section (9.2 R05)



The **Company Side panel** gives valuable information on the status of the company you are looking at. Select Company or Preview in the drop-down menu and select the company you want to look at.

The **Project** section gives you an overview of all the projects that contacts in the company are members of.

CRM – Task button show Web panels on main cards (9.2 R05)

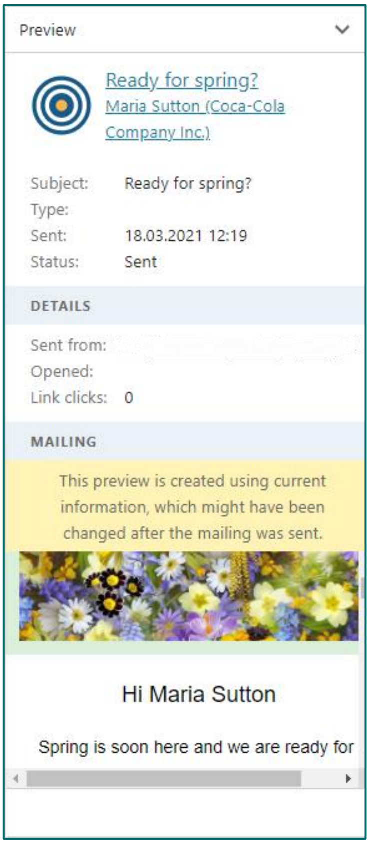


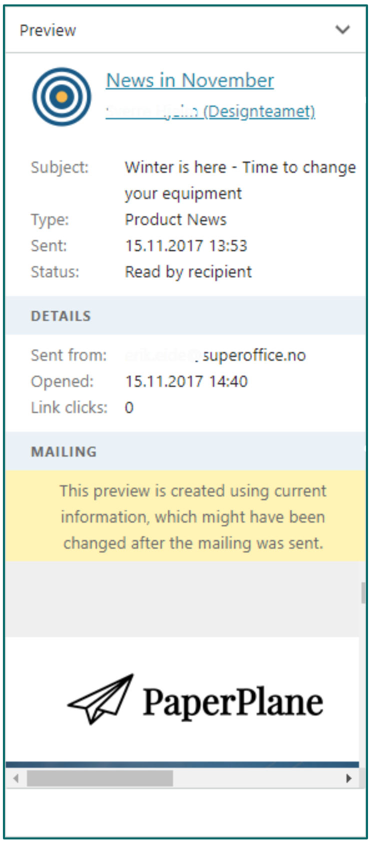
From the Task button in the main display window, you have an option to add the visibility of **Web "panels"** in different places.

These are the different places you can add and view web panels from:

- Company card: Done
- Person card
- Sale card
- Project card
- Appointment dialog
- Document dialog
- Quote dialog

CRM – Mailing preview in Side panel (9.2 R06)



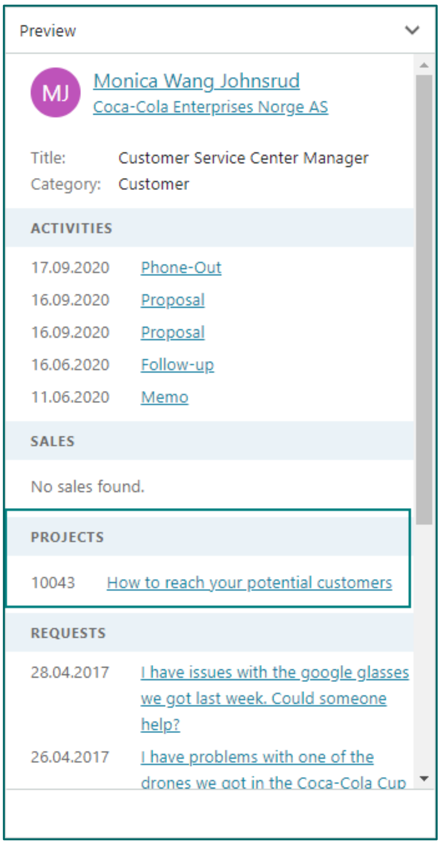


When selecting a mailing, the **side panel** can show a **preview** of the mailing info.

The info also includes the status of the mailing and whether the recipient has received and read the mailing.

The preview is created using real time information, which may have changed since the mailing was sent.

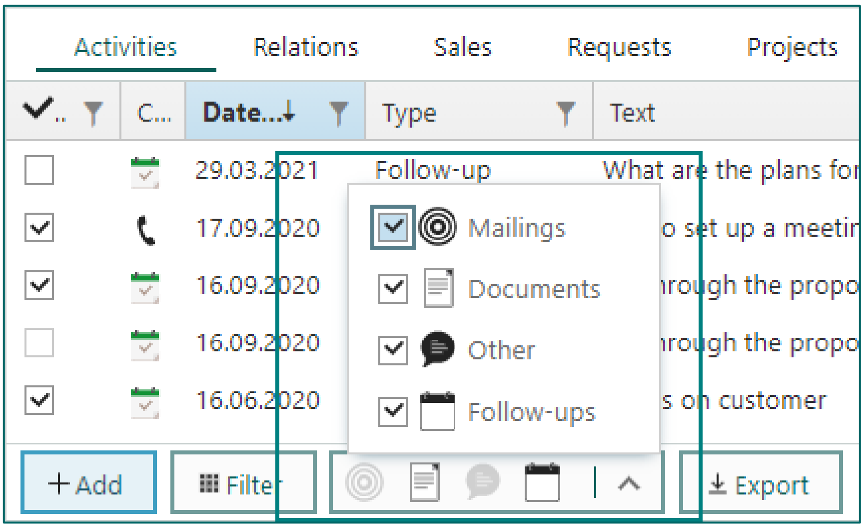
CRM – Contact side panel with projects (9.2. R06)

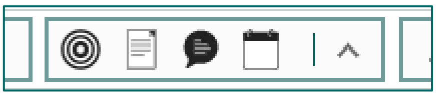


On the **preview of contact** you will see all the **projects** this contact is a member of.

It's also easy to navigate to the different projects from here, by clicking on the project links.

CRM – Activities archive with new type select (9.2 R07)

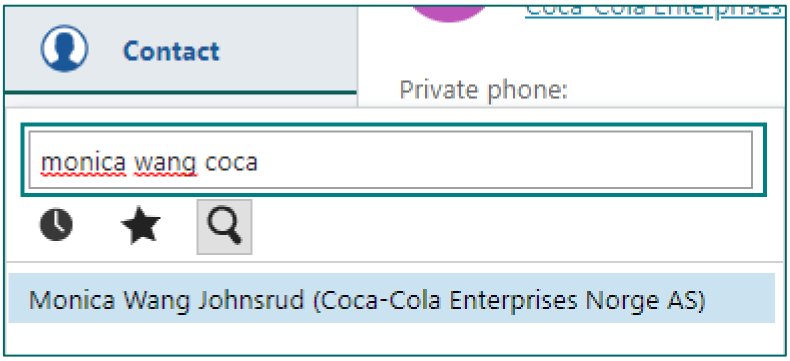




The different **activity types** are listed in a drop-down menu. Check or uncheck the ones you want to see.

The menu takes up less room and its easy the activity types selected.

CRM – Optimized navigator search on contact (9.2 R07)

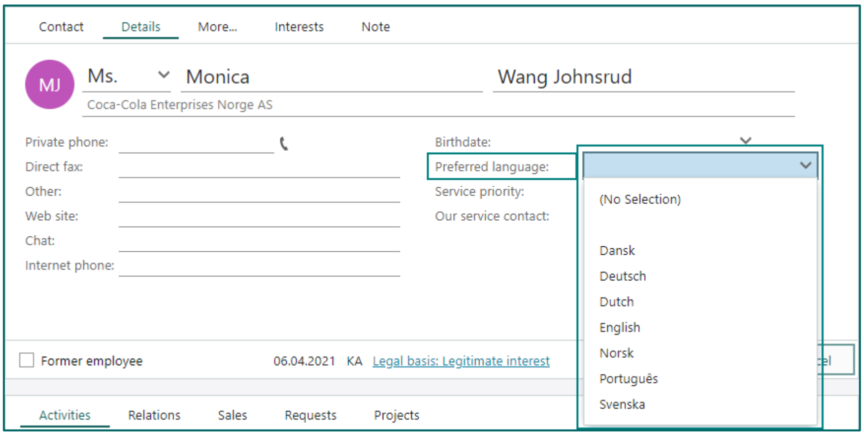


You can search for multiple words in the **navigator search** in contact.

To make the search better and faster, there is a limit of three search words.

You can still search for both contact name and company name, but you are limited to 3 words in total.

CRM – Customer language with multiple checks (9.2 R07)



We have expanded the language check to contain the following parameters:

1. If a preferred contact language is set and an e-mail template is available in this language, this will be used.
2. Otherwise, 'if the contacts country can be mapped to a corresponding e-mail template, this will be used.
3. If none of the previous give a hit, the preferred document language for the logged in user is checked, and if an e-mail template with this language is found, this will be used.
4. If preferred doc language preference is not set, the UI language the user has selected for SuperOffice CRM will be checked, and if a corresponding e-mail template is found, this will be used.
5. If none of the above give any hits, the English e-mail template will be used.

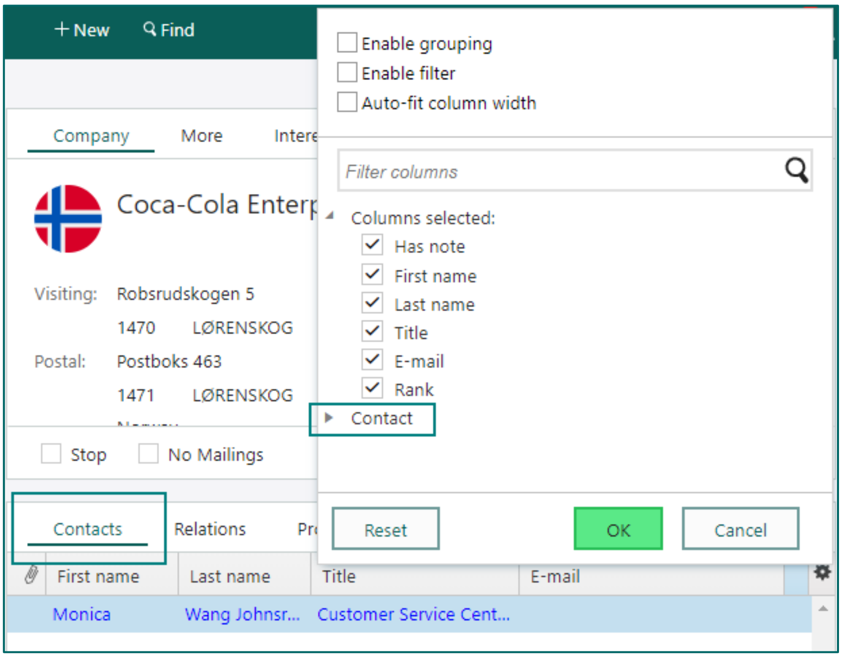
A new contact will receive an **e-mail** to notify them that their details have been saved. But what **language** should the e-mail be sent in?

These checks will also be used when sending out **invitation e-mails,** to make sure contacts get the best language support.

SuperOffice CRM comes with 12 or 16 translated e-mail templates by default. (The GDPR templates come in 12 different languages.)

See more details: https://community.superoffice.com/en/product-releases/bugs-wishes/product-issue/?bid=8548&azure=1

CRM – Archives with column clean-up (9.2 R07)

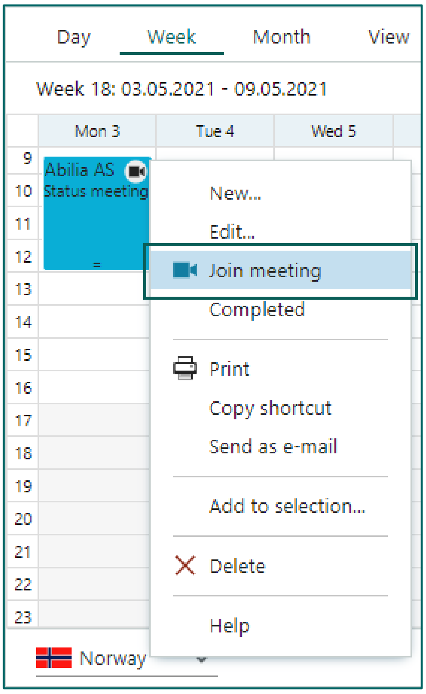


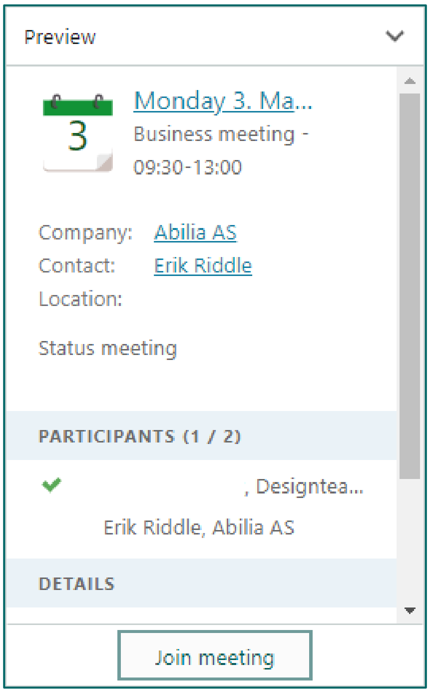
There has been a clean-up of selectable columns in the different **archives**.

Some of the **column** options from before served no purpose. For example, appointment fields in the **Contacts** archive. Since a contact is linked to several appointments, the column would not give any valuable data in return.

It is now less cluttered and easier to find **columns** to show in each **archive**.

CRM – Diary – Join meeting with right click (9.2 R08)



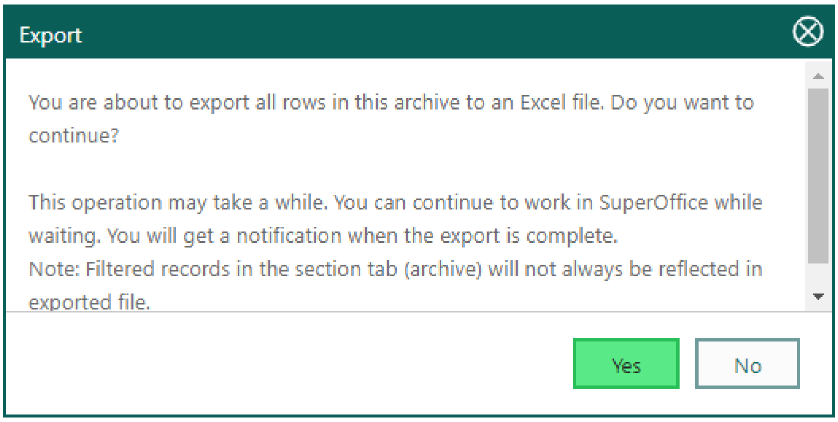


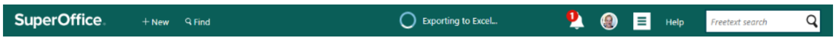
If you have a video meeting starting and your Diary is open (any view/tab), open the context menu (right click menu) for the appointment and select **Join meeting**.

Just two clicks and you are in your video meeting.

PS! You can off course also start your **video meeting** using the **Side panel Preview** or open the **appointment** and use the **Join meeting** button.

CRM – Export to Excel from archives (9.2 R09)



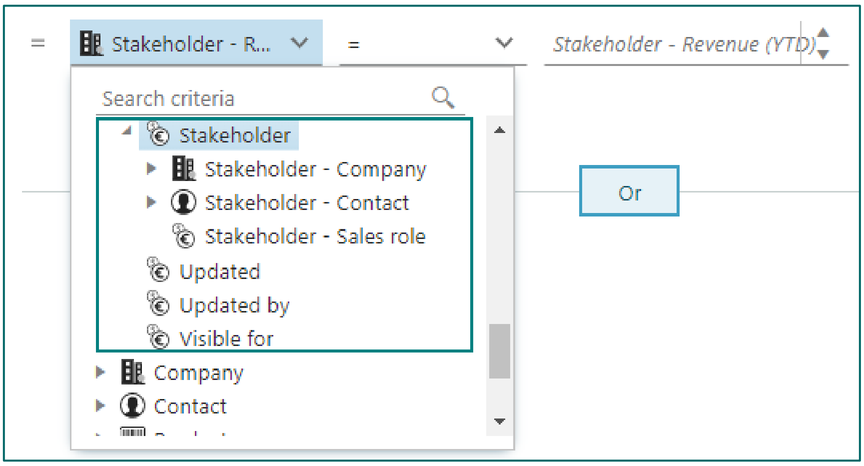


The **Export to Excel** function is a batch task that gives you the possibility to continue work as normal while the export takes place.

This is good especially when working on large exports that can take a while.

When the batch task is finished, t a **Save as** -dialog will appear, and you can save it in the desired folder.

CRM – Sales criteria on Sale Stakeholder (9.2 R09)



In **Sale find** you have multiple criteria options for **Stakeholder**, both in Company and Contact. Just select your preferences from the lists.

NEW AND IMPROVED CUSTOMER ENGAGEMENT PLATFORM

Customer Engagement Platform – a separate add-on (9.2 R01)

With SuperOffice CRM 9.2 a new concept – **The Customer Engagement Platform –** that supports interaction with customers across multiple channels, and is fully integrated with your CRM solution, has been introduced.

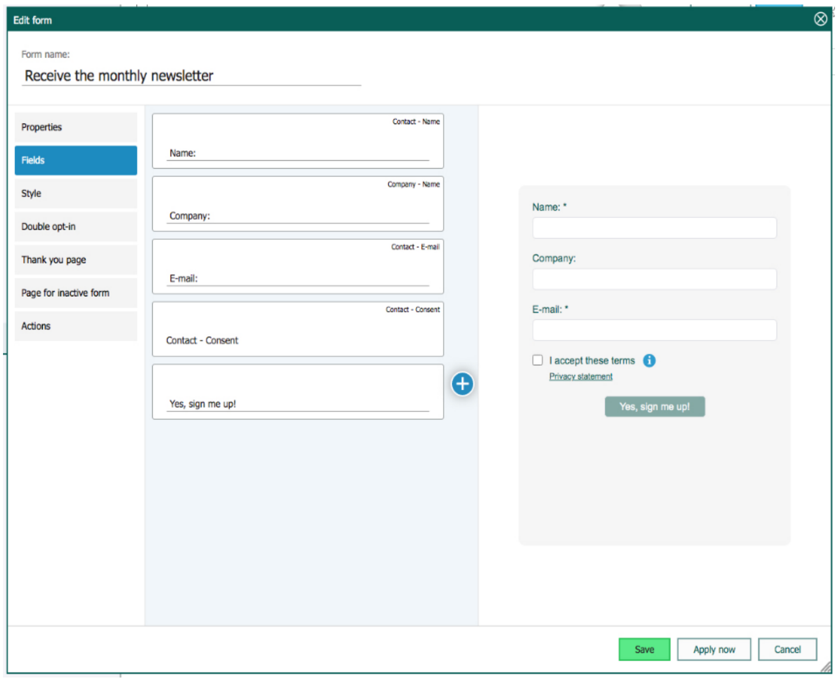
It contains standardized customer facing apps for **Chat**, **Forms**, and **Customer Center**, that can be used out of the box to fit your brand experience.

In addition, it is possible to customize beyond the standard confirmation options using the different customization tools inside Expander Services.

All customizations are automatically deployed and operated on the platform. No external websites or hosting is needed.

Existing customers who already have Customer Center will automatically receive the new product at no additional cost.

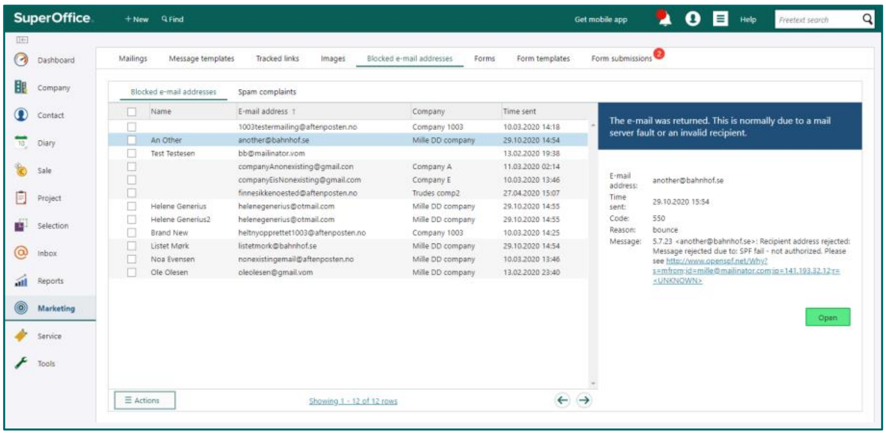
Marketing – Forms available as a separate add-on (9.2 R01)

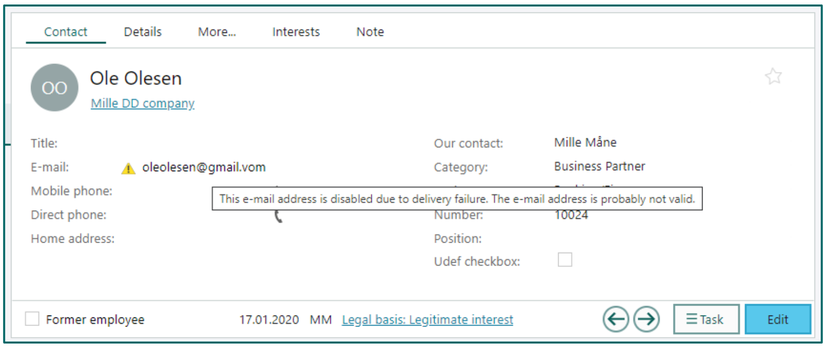


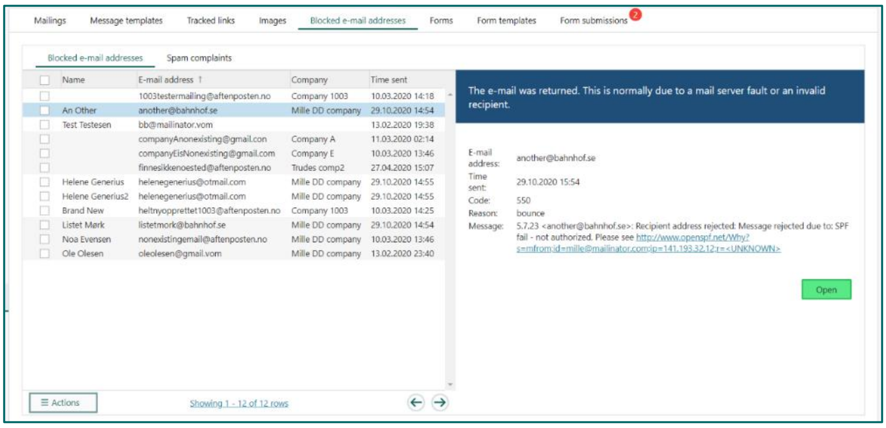
The ability to create new **Forms** has until now only been available for Marketing and Complete users.

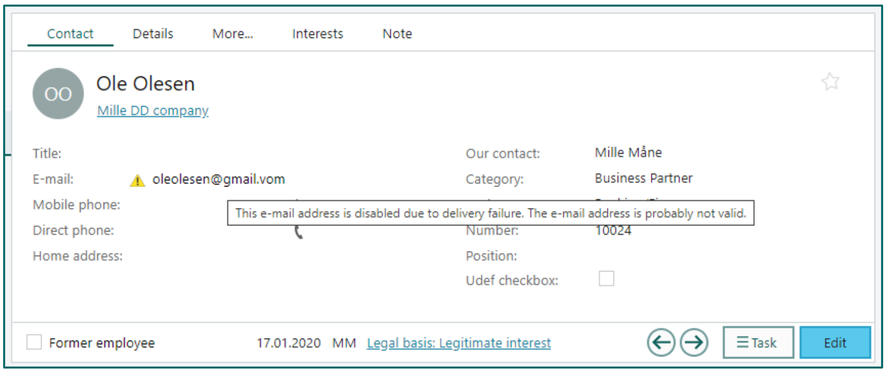
With SuperOffice CRM 9.2, Forms is available as a company-wide add-on subscription.

For existing customers with access to **Forms**, the only change is that all users independent of user plan (with the exception of Standard user plans) now have access to create and edit Forms.





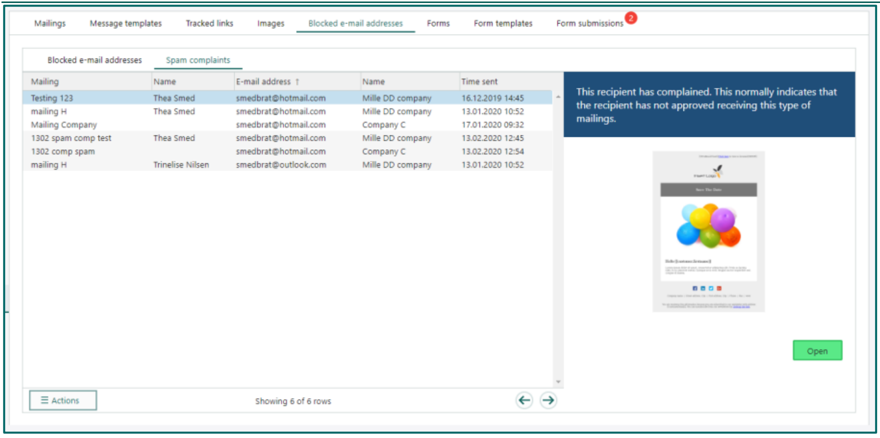




The ability to handle **bounced emails** and spam complaints has been improved.

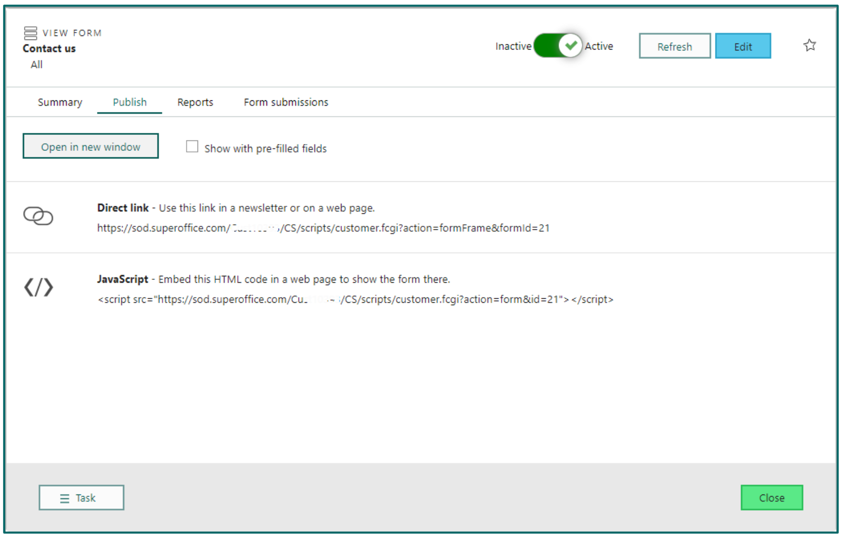
Emails that are failing for permanent reasons or have bounced several times will be **automatically blocked and skipped** in future mailings. All blocked email addresses will be archived in one place. This will allow for a better overview and easier clean-up of failing email addresses.

From the archive you can open a contact card to manually correct the email address, or you can delete all failing email addresses. Online Mailgun customers will also be able to see if recipients are reporting an email as spam or junk in a **separate Spam complaints** archive. Spam complaints normally indicates that the recipient has not approved receiving this type of email from you.



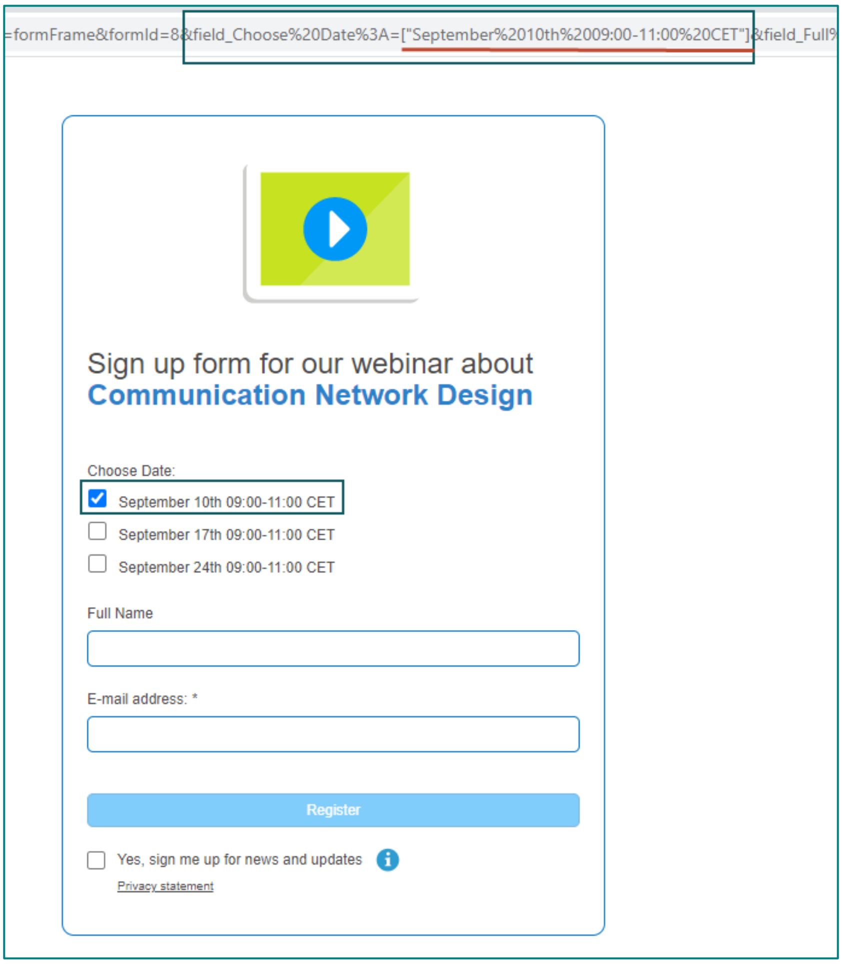
Finally, SuperOffice is trying to prevent misspelled emails in the system as an effective way to prevent bouncing emails. This is done by validating incoming email addresses through Chat and Forms. We perform a DNS lookup and validation of basic email syntax.

Forms – Embedded with less JavaScript (9.2 R02)



The embedded form on your website has been made more light weight. This is to make the form render faster without unnecessary JavaScript.

Forms – Pre-filled check box options (9.2 R03)



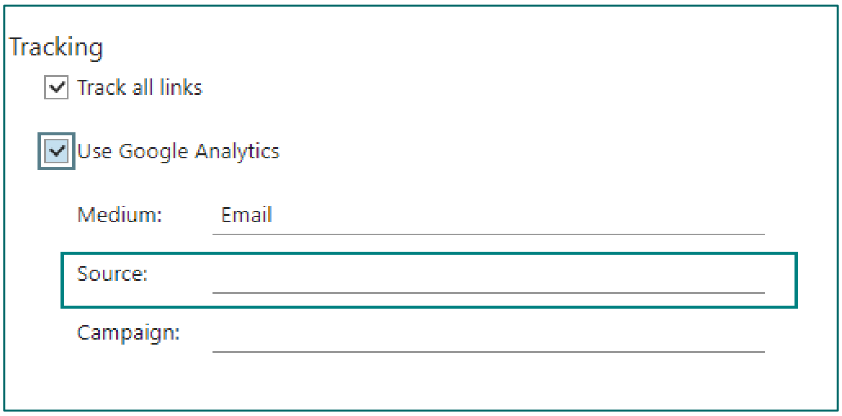
When you publish a form, you might want to pre-fill a check box, so the user of the form does not need to check it.

To do so, you need to select the "**Show with pre-filled fields**" and then edit the url.

In the url, add the wanted check box text with ["xxx"] ("xxx" = text of the check box) after the field name, and use that edited url for the form.

Example:
…&field_**Choose%20Date**%3A=**["September%2010th%2009:00-11:00%20CET"]**&…

Marketing – Google Analytics with Source (9.2 R04)



In the setup of a mailing, you have the option to use Google Analytics as the tracking system.

The set up in Mailings has changed to provide more accurate tracking of emails sent and is better matched to the fields used in the Google Channel reports.

When in the setup of carrying out a mailing, you have the option to use Google Analytics as the tracking system.

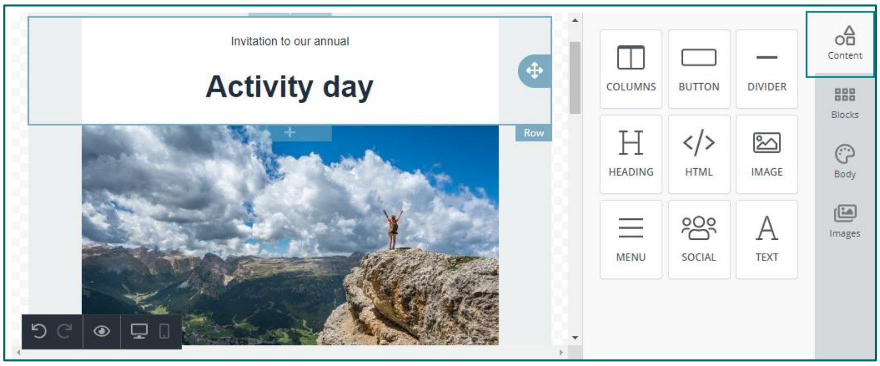
The set up in Mailings have changed to provide a more accurate tracking of emails sent, and is a better matched to the fields used in the Google Channel reports. If you already use Google Analytics to track website traffic, then you will want to recognise the different sources of traffic including emails sent from SuperOffice.

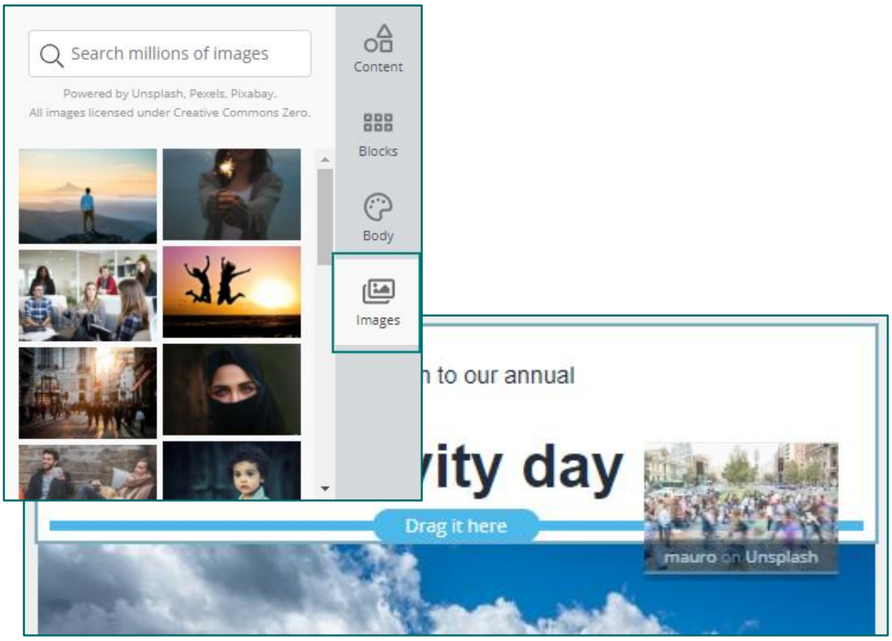
"Email" is now the pre-defined medium in automated UTM tags. This means that tracking of mailings sent from SuperOffice CRM is now found in Google Channel reports under "Emails" rather than "other".

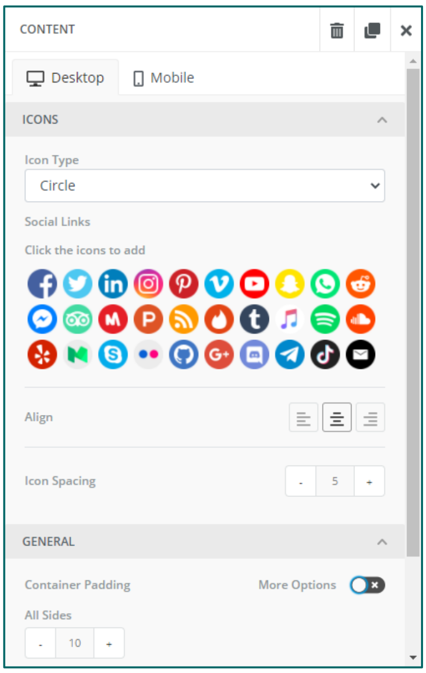
To identify the specific email as a source, the fields for "Source" and "Campaign" must be completed. This will provide more accurate tracking and reporting in Google.

Marketing – Drag & drop editor for Mailings (9.2 R05)

E-mail, Form response and Message templates







What a joy to work with the **Drag & drop editor** for mailings and form response.

So easy to select the different **Contents** containing columns, button, divider, heading, html code, image, menu, social and pure text.

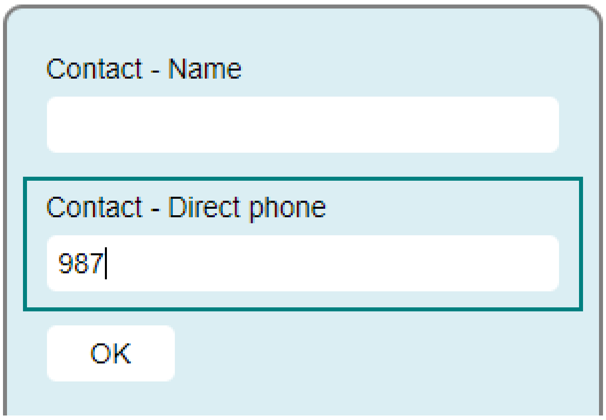
The real highlight is **Images**, where there is a huge image bank – of literally millions of royalty free images – that are free for use. The images are all licensed under **Creative Commons Zero**.

Just pick a search word you want to use, scroll and select an image you like, and then simply drag it into the right section or row in your mailing.

You can also create your own **Social** media container, to use in all your mailings. Both easy to create and maintain.

We also have about 50 message templates in the **Online template library**, where you can choose a setup you want to start with. Alternatively, start with an empty canvas and work from there.

Forms – Validation of phone numbers (9.2 R05)

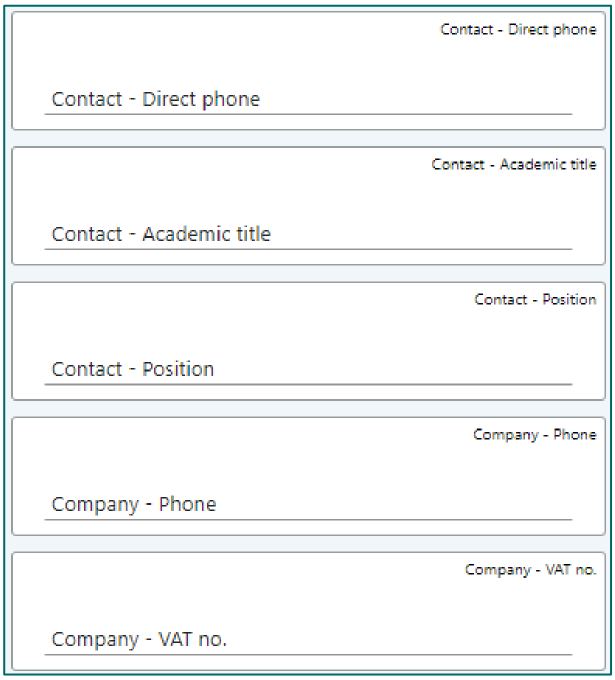


When setting up a form where you use phone **number** fields, a **validation** step is built in. This means the field can only contain numbers.

So, if you try to enter other characters, nothing will be entered.

This makes it easier to get **valid data** in and less corrupt data both in the form fields and in the creation of new companies and persons in SuperOffice CRM.

Forms – More company and contact fields available (9.2 R05)



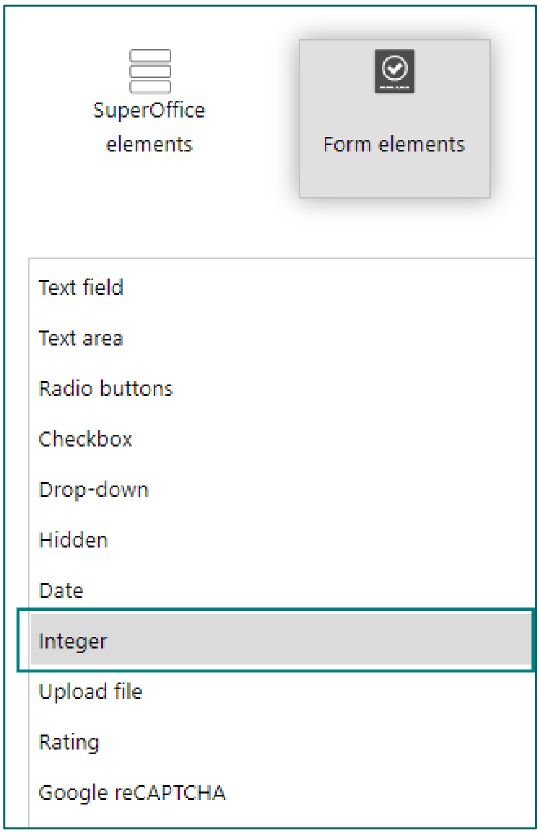
When setting up a new form, you have several fields you can choose from.

These are the new **fields** added to the list:

- Contact – Direct phone
- Contact – Academic title
- Contact – Position
- Company – Phone
- Company – VAT no.

You also have the option to choose **user defined lists** as drop downs in your form.

Forms – Integer on Form elements (9.2 R05)

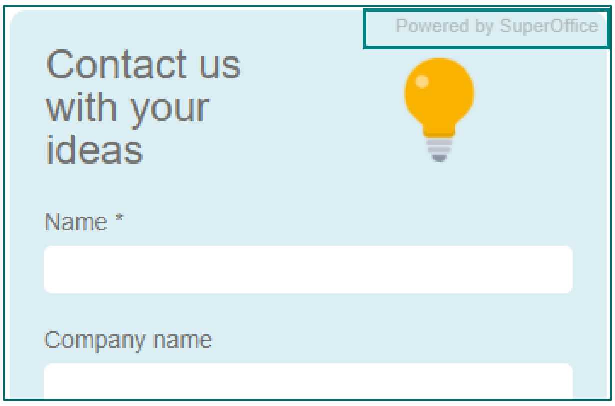


On the **Form elements** option you have several different types.

Integer is one of them and allows you to add a number field in your form to use for any number value you like.

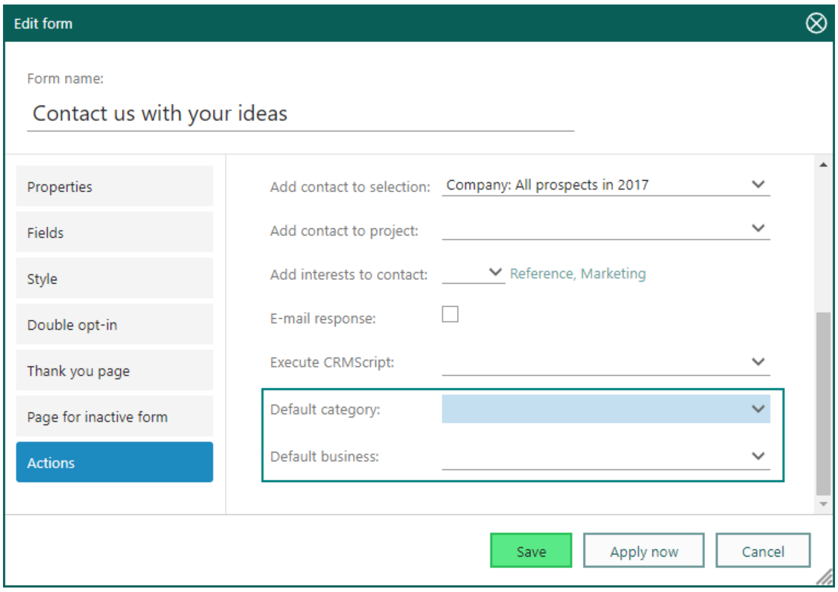
Very useful when the form contains a field for an order number or invoicing number.

Forms – Watermark with Powered by SuperOffice (9.2. R06)



On a form, there is a "**Powered by SuperOffice**" **watermark** in the top right corner. This is information that the form has been created by and used with SuperOffice CRM.

Forms – Specify default Category and Business (9.2. R06)

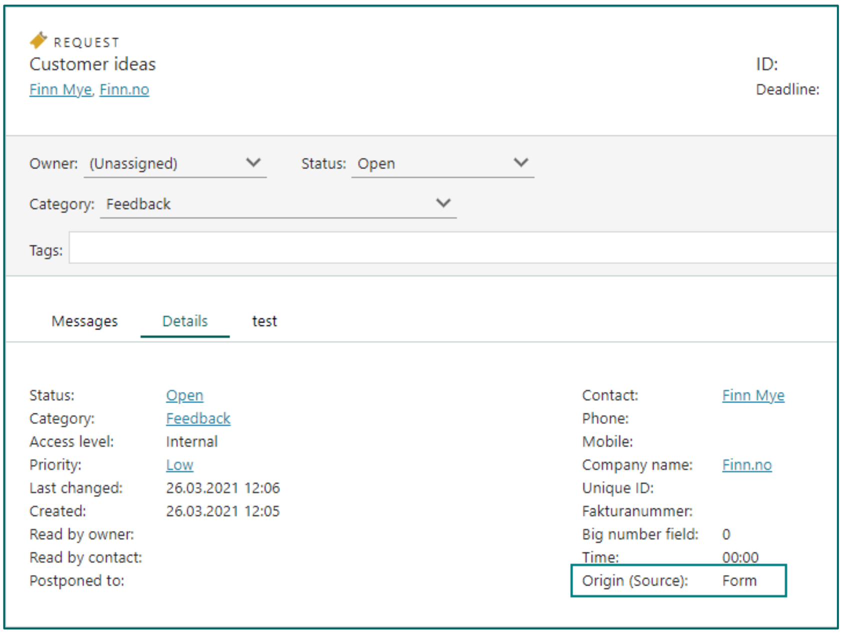


When creating a new contact and/or company based on the form fields, you can set up the **default category and business** on the tab for **Actions**.

With this option, you can group the form submissions and new contacts to one specific category and/or business. For example, if you have a form for prospects, you select prospects as your category.

You can then easily create selections based on this category and/or business.

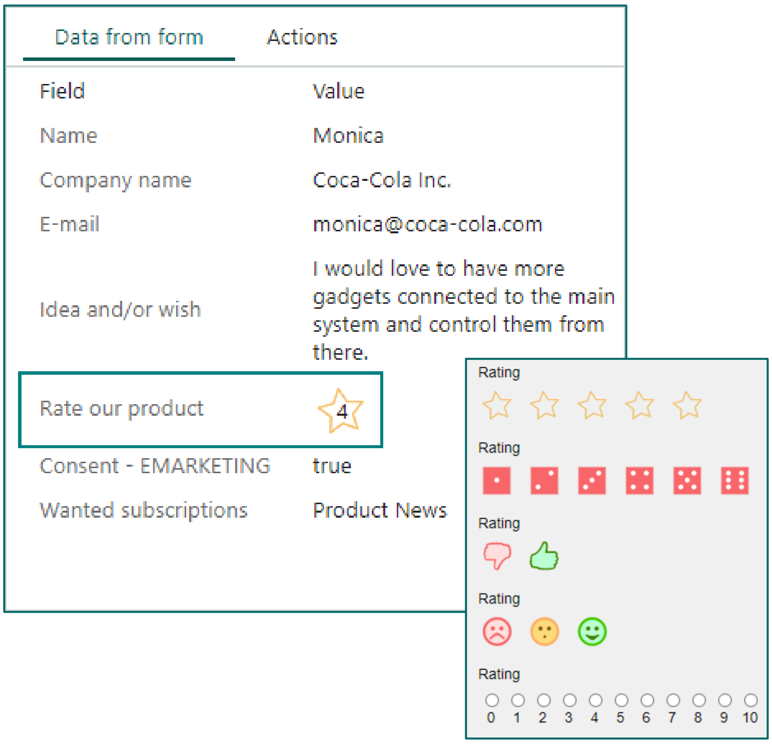
Forms – Added request are set with Origin = Form (9.2. R06)



When setting up a form, you can choose that a request is automatically made when the form is filled out and submitted. The request will have a default setting of **Origin** = Form as the **source.** This will make it easier to set up rules in Service for which category or list it will appear in.

Once the **source** is set, it's easier to group the requests and also get statistics on the number of requests generated (forms filled in) for different forms.

Forms – The form submission shows icon instead of number (9.2. R06)

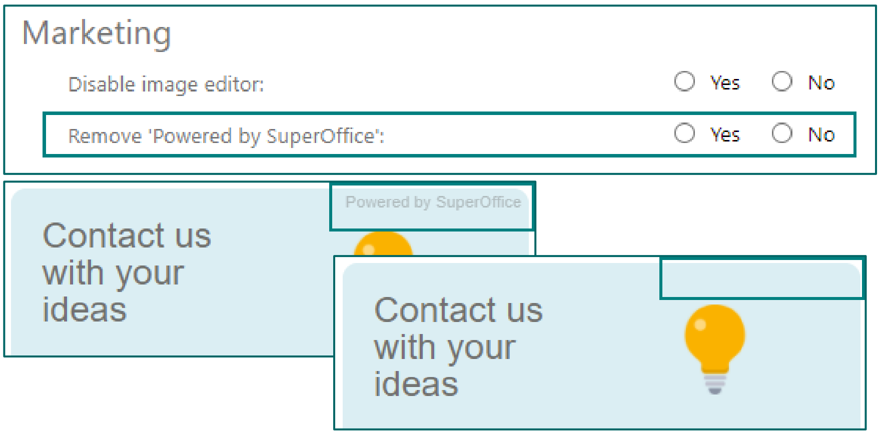


When using the different **rating** fields, you get icons to click.

On the form submission, you will also see the **icon** with the rating, so it's easier to understand what type of rating it is:

- Stars
- Dice
- Thumbs
- Smiley
- NPS

Forms – Hide tag "Powered by SuperOffice" (9.2 R08)

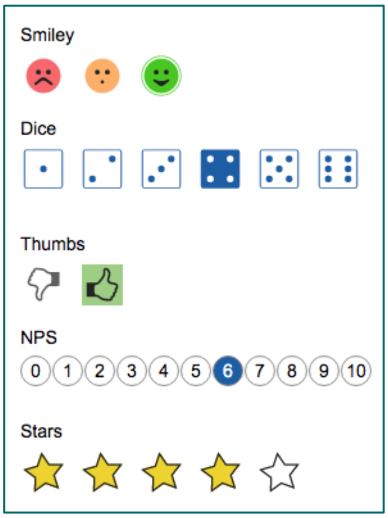


In **Global preferences** you can choose to **Remove 'Powered by SuperOffice'** water mark.

Depending on your choice, you will (or will not) see the watermark on all your forms.

Note! This is a global setting, and not per form.

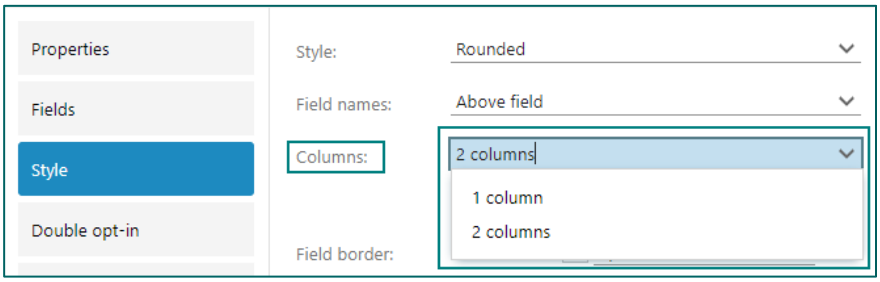
Forms – Rating icons with new look (9.2 R08)

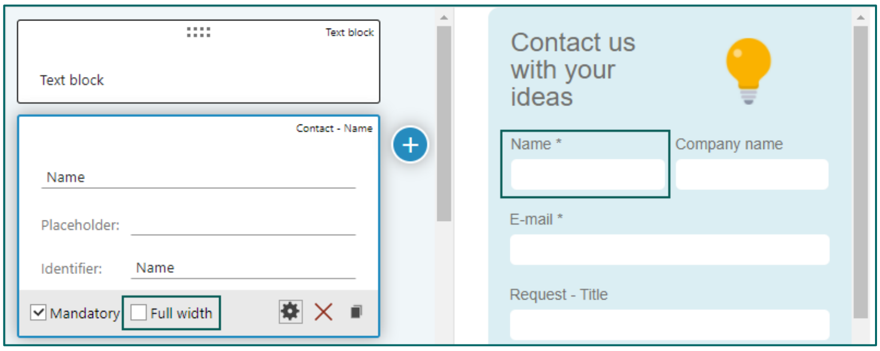


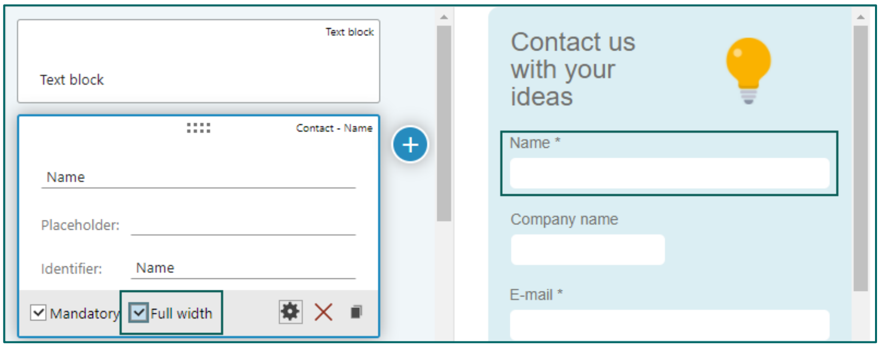
The **icons** used for **ratings** has a new fresher look. You can choose between:

- Smiley
- Dice
- Thumbs
- NPS
- Stars

Forms – Two column form (9.2 R08)





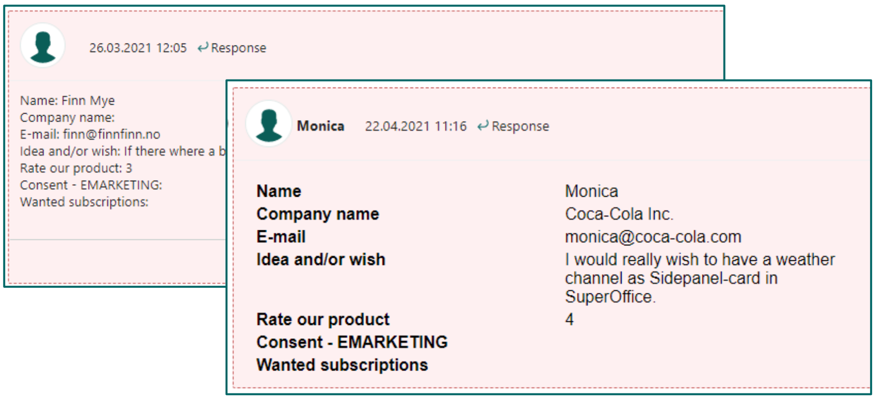


On the Style section you have an option to choose to see the form as **1 column** or **2 columns**.

On each field on the form there is a setting, **Full width**, where you set yes or no to show the field in one column or both columns.

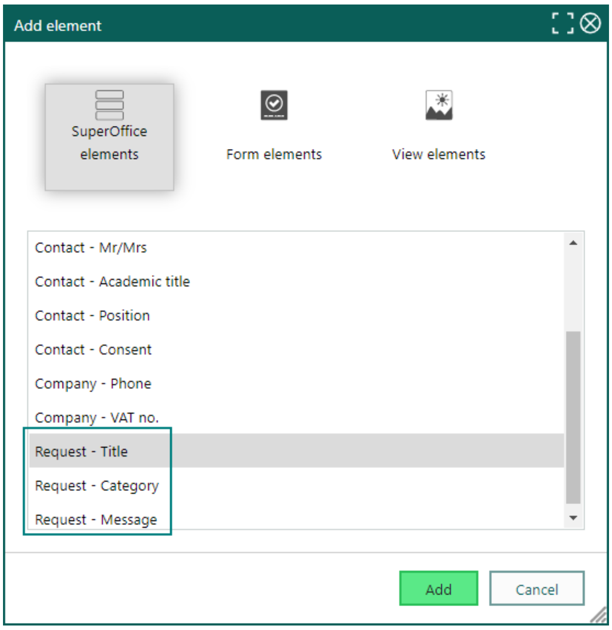
When the screen is small (like on mobile or other), the rank is as the fields are placed in the overview (left to right).

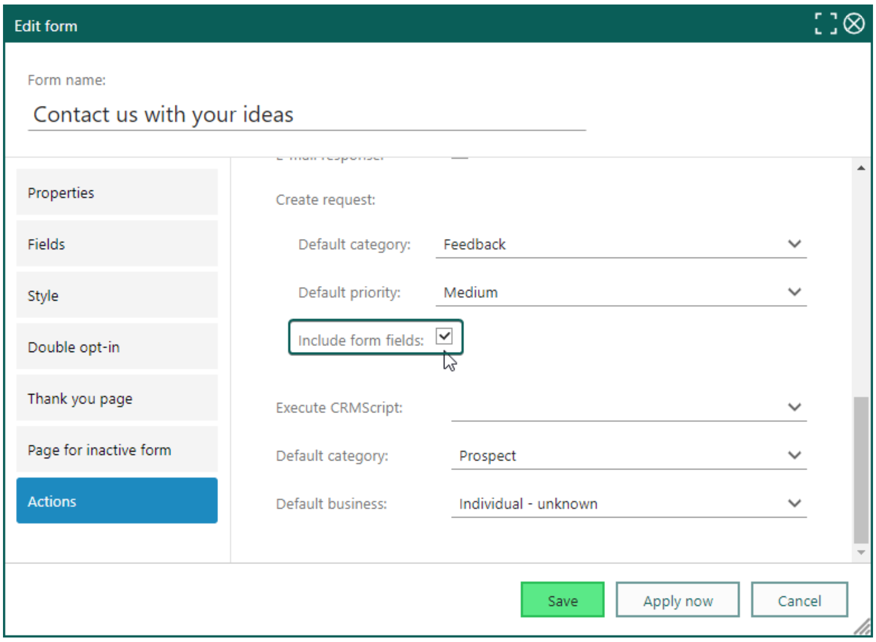
Forms – The request view of form (9.2 R08)



The **form response** will be added to the created **request**, and have a table structure format, to make it easier to read the content. If there are multiple selections, those will be displayed as bullet points.

Forms – Create requests with forms (9.2 R08)





On your customer portal it's useful to give your customers an opportunity to send in requests.

By creating a form using the fields:

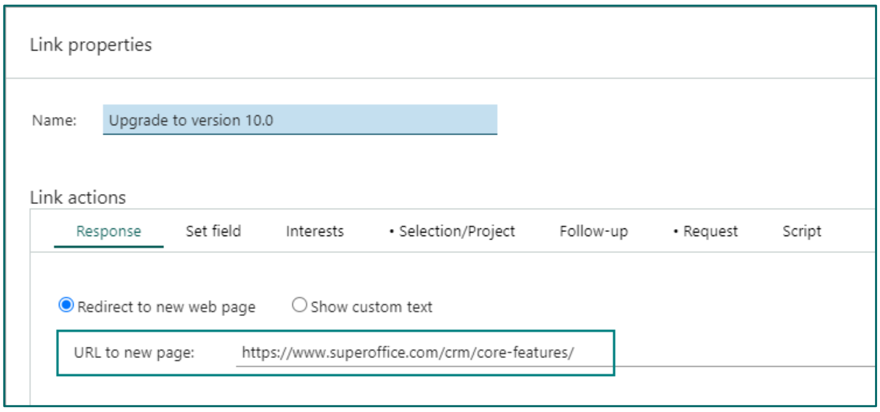
- Request – Title
- Request – Category
- Request – Message

you get some extra fields in the **Actions** tab, where you select the **Default category** and the **priority**.

There is also a setting for **Include form fields** (Yes/No) – by selecting Yes, you get the form submission info in a table inside the request.

This is a neat way to create requests directly in Service with a form, and all info is included as request info.

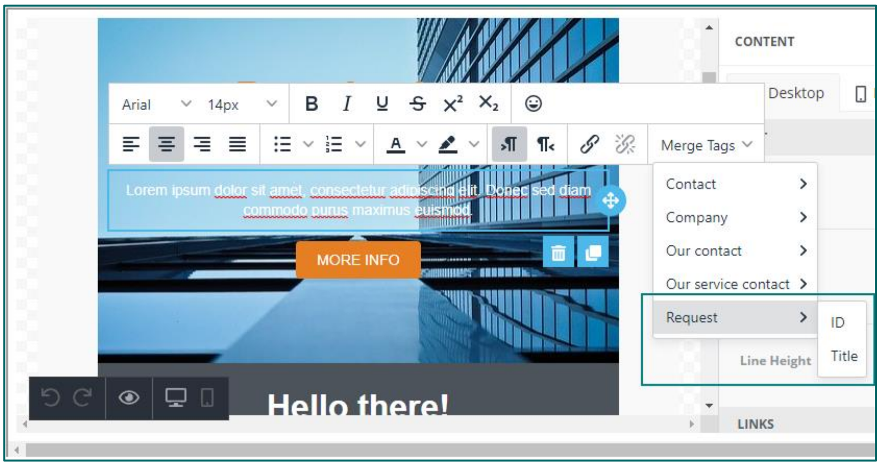
Mailing – Tracked links with new hostname (9.2 R09)



Generated tracked links contain a hashed string which includes hostname. There are scenarios where it may be necessary to change the hostname but this will render links invalid. It's possible to add the new hostname into the database (this can only be done by a consultant or by the Online team in SuperOffice).

This will make sure that mailings with links sent to customers earlier, also work after the new hostname is enabled. This requires more setup to handle the redirect from the old url to the new on webservers.

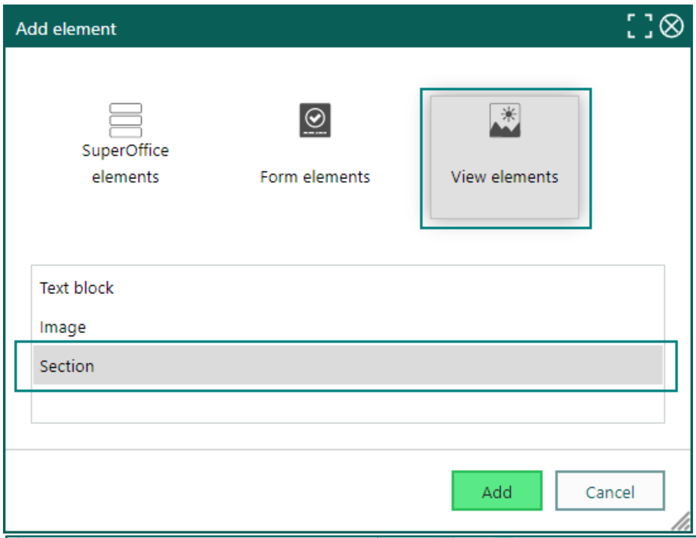
Forms – Form response with request variables (9.2 R10)

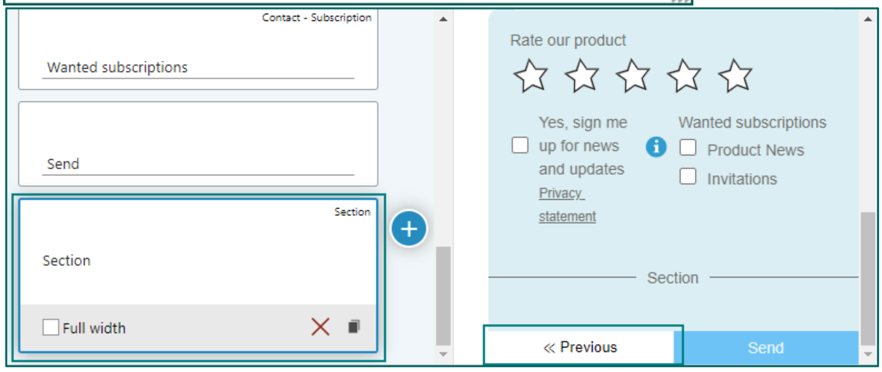


Request variables is available when creating a **Form response mailing**. When using the editor, you will get **Request Id** and **Title** as per-defined choices in the **Merge Tags** drop-down. Other parser variables must be written manually.

This is very useful when you use forms to create requests and to provide an automatic response to customer with information about the created request.

Forms – Multiple pages on the form (9.2 R10)

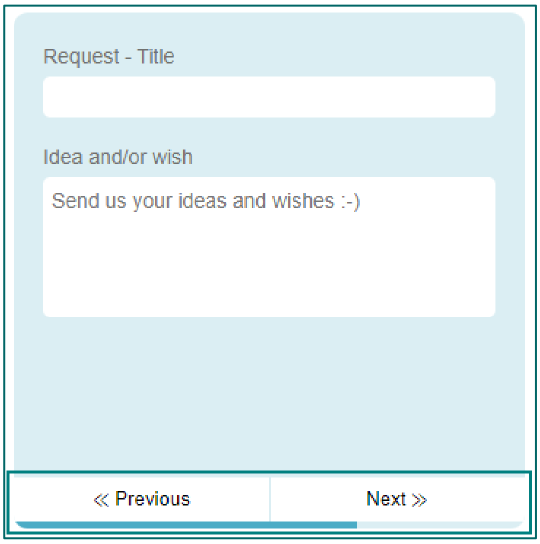




There is an option when you want multiple pages on the form.

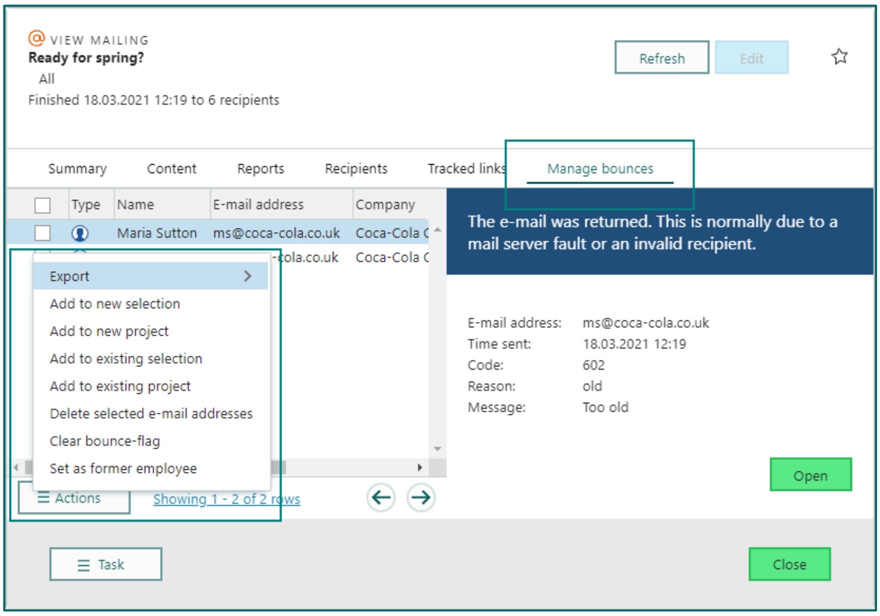
In the **View elements** you have an option to add **Section**.

Place this section between the last element on one page and the first on the next page, you will see the **Section** field in the preview on the side.



There is an option to show paging on the form, together with the **Pervious** and **Next** button. Like that the user will see how many pages there is and how far they have come. Go to the **Style** settings and **Progress bar colour** and select the colour of the progress bar. To remove, click on the **X-** button behind the colour box, so the progress bar does not show on the form.

Mailing – Bounce management per mailing (9.2 R11)



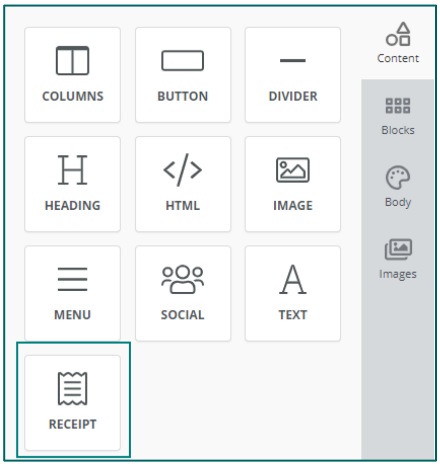
When you work with one mailing, it's very convenient to see the bounced e-mails.

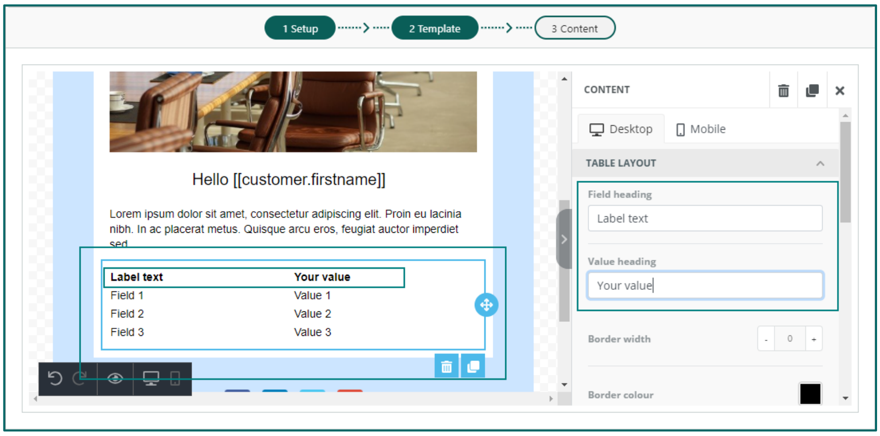
In the View screen on each mailing you see the **Manage bounces** tab where you have some nice actions.

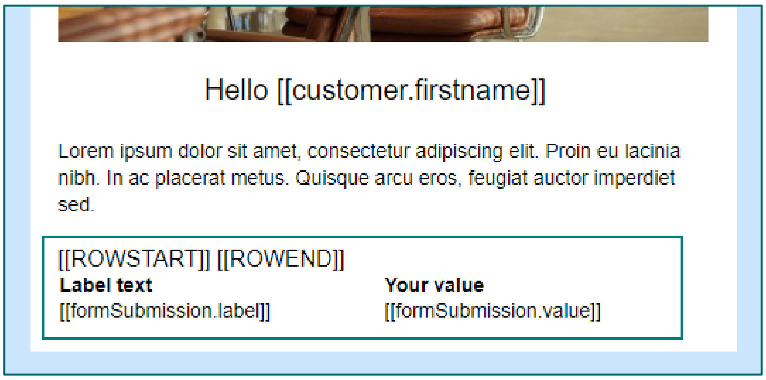
Like that, it's easy to use the actions to clean up your bouncing e-mail addresses, either by setting the contacts as **former employee** or **deleting the e-mail addresses**.

Available columns are: Type, Name, E-mail address, Company, Bounce code and Bounce reason (the last two visible only with Mailgun).

Forms – Form response mailing with the form info (9.2 R11)







On a form you can set up to send a form response after a person has submitted the form.

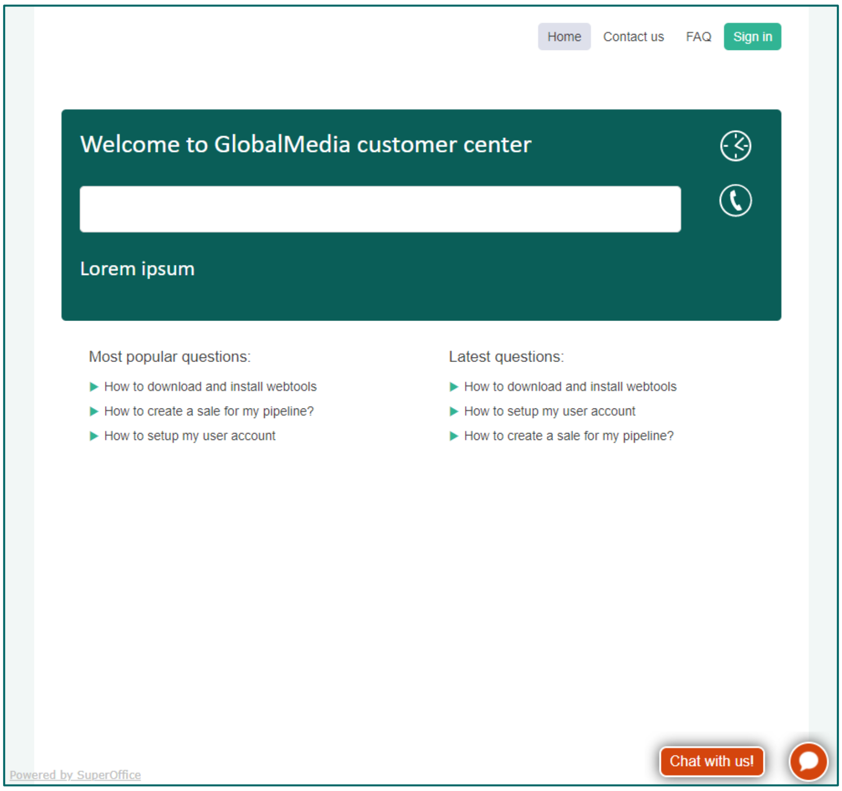
The **form response** can contain the values the person choose/added to the form submitted. And that is nice, just to give them a "receipt" on their choices.

Go to edit your form response mailing and select the **Content** type: **Receipt**. Just add correct text for Field heading and Value heading. You can also change the settings for border and font.

And when the form response is sent out to the form submitter, all fields and values are shown in the table, easy to read and double check for the receiver.

NEW AND IMPROVED SERVICE

Service – Customer Engagement Platform (9.2 R01)

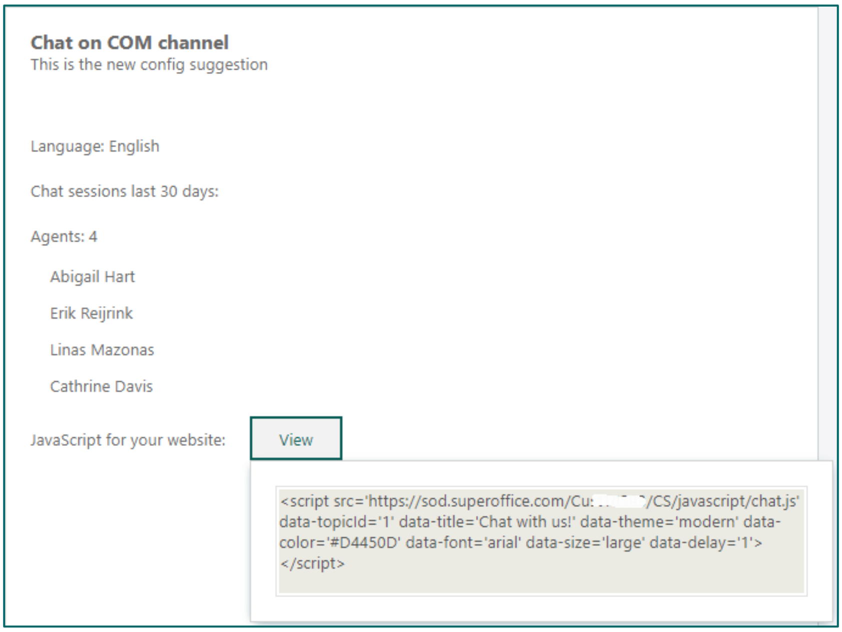


Customer Center redefined as part of the Customer Engagement Platform.

The ability to publish a **Customer Center**, manage external users and provide a website for self-service to customers is from now on re-packaged as part of the **Customer Engagement Platform** concept.

Existing customers with access to the Customer Center today will automatically get a subscription to the Customer Engagement Platform at no extra costs, and effectively experience no change. They will however, gain the benefit from all future development and features added to this concept.

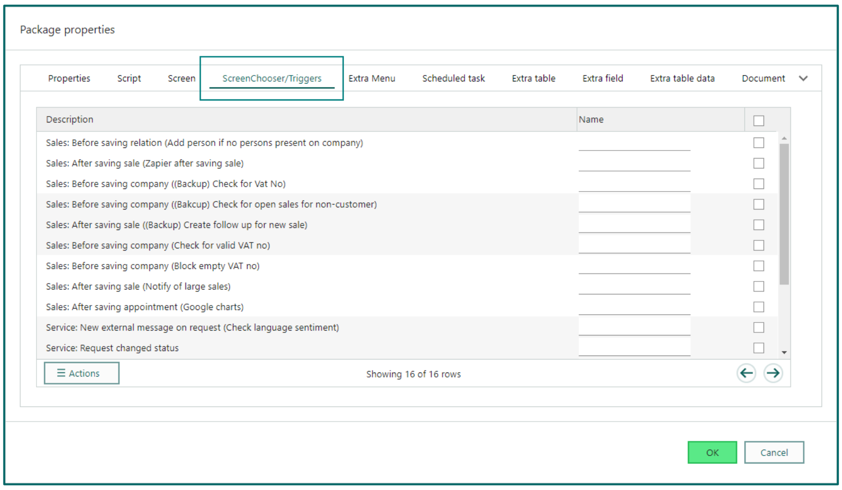
Service – Chat widget fixes for 3rd party cookies (9.2 R01)



When the chat widget is placed on an external page, the browser detects a third party cookie. This results in the widget sometimes being blocked.

Introducing the possibility to open the chat widget in a new window, allows you to write and get comments in the same session without being blocked or missing information.

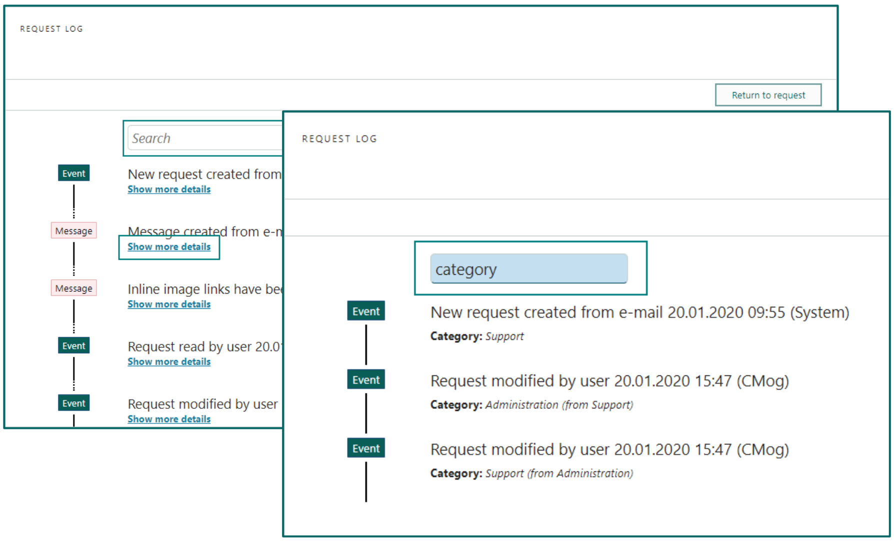
Events – Export of Triggers in packets (9.2. R06)



When customizing an installation, you sometimes want to **export** the different changes to **package**. You can also export (and import) **ScreenChooser/Triggers** and reuse them in other installations.

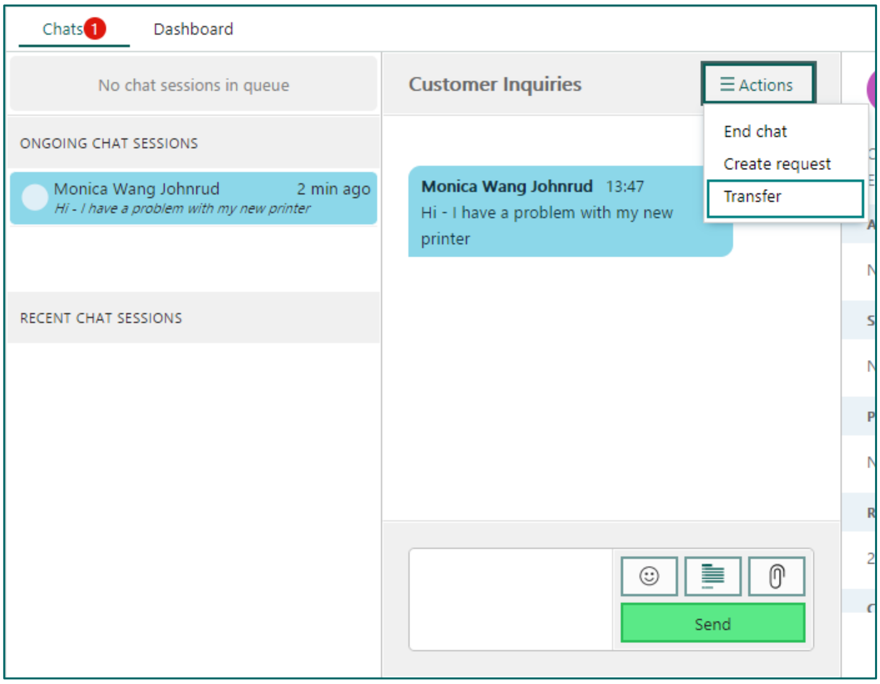
This will help when setting up a test environment, with the exact same **triggers** as the production installation.

Request – Request log with search (9.2 R07)



The **log** view of a request has a more compact view with a collapse/expand option. And with the **search** option, you can filter what you see, and it is easier to find what you are looking for.

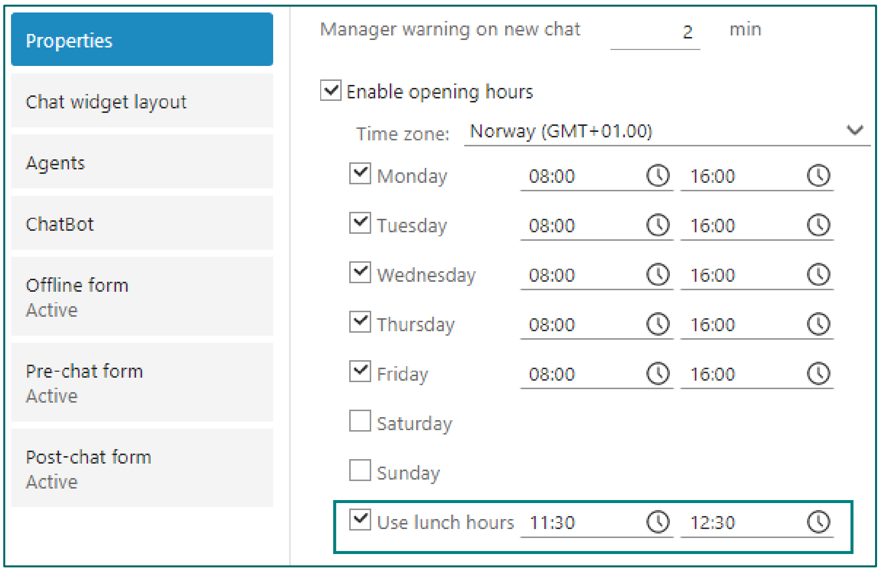
Chat – Transfer by managers (9.2 R11)



You, as an agent, can **transfer** a chat to another agent.

A **manager** can also **take over** the chat or **transfer** this to another agent. With this possibility you have some administrator rights to make sure the customer gets an agent that is available and can help the customer correctly.

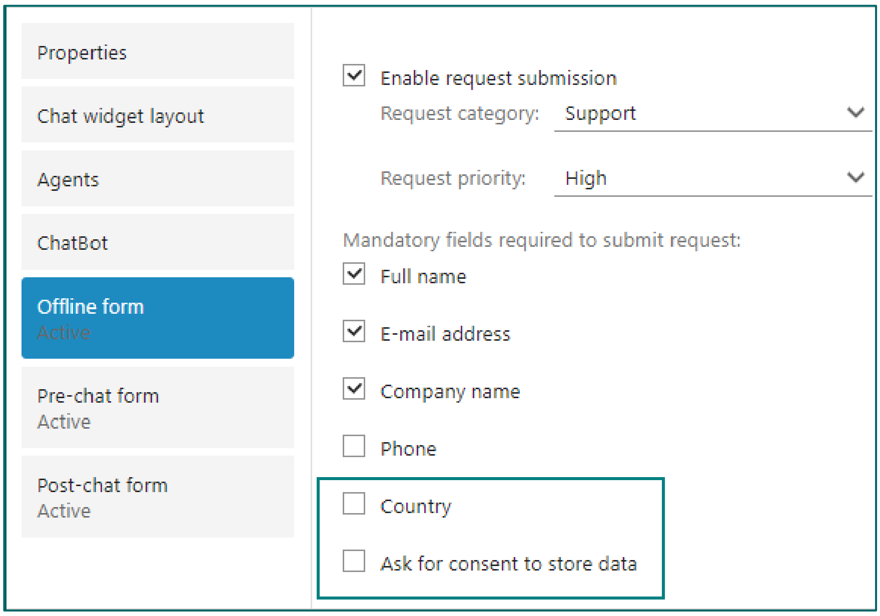
Chat – Add lunch in the opening hours (9.2 R12)

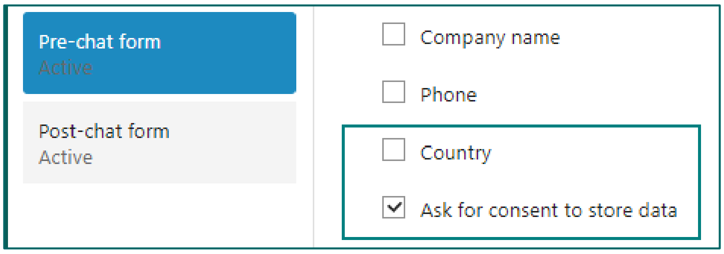


Setting up a chat channel, it's very valuable to add the **opening hours**, if you company do not have 24/7 opening hours.

If **opening hours** are defined on your chat channel, it is now also possible to define an option for **lunch hours** every day. During lunch hours chat channel will be in **Offline** mode.

Chat – Offline and Pre-chat form with country and consent fields (9.2 R12)

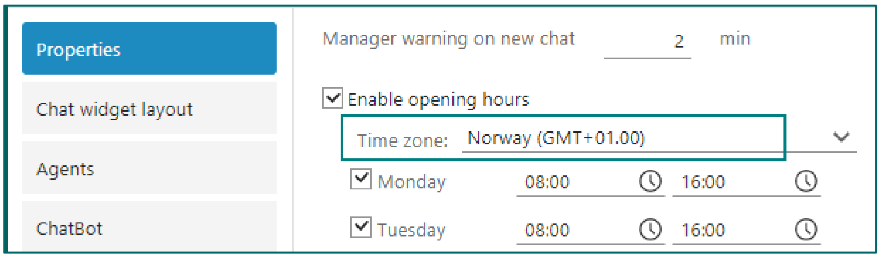




When creating the **chat widget**, you select some fields to show on the Offline form and the Pre-chat form. This is mainly to make it easier to contact the users after they have added all needed data.

Especially with GDPR, we need to make sure we have all in place and good to go, before we contact our customers.

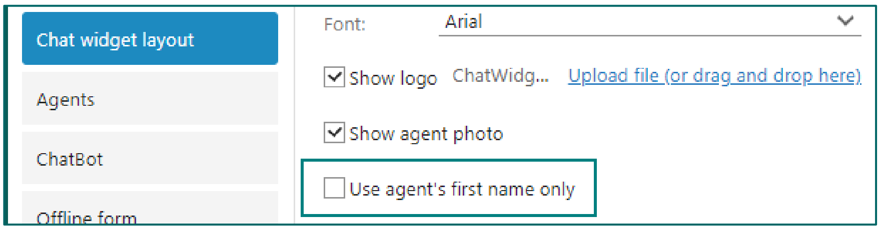
Chat – Support of Time zone in chat (9.2 R12)

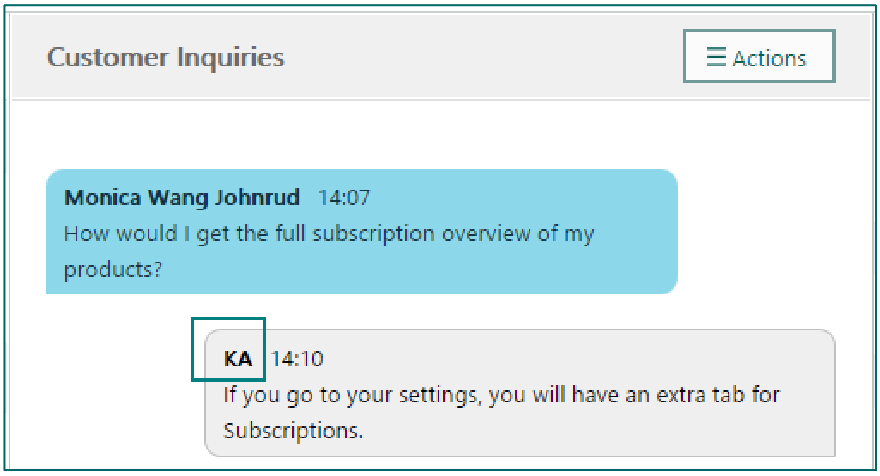


When chatting with users on different **time zones**, users might be a little confused if they see a different time than their own.

Instead of using local server time in time stamps it will be translated to correct **time zone** according to client browser, ensuring that time stamps displayed to customers are in their **local time**.

Chat – Show agents name with nickname or first name (9.2 R12)





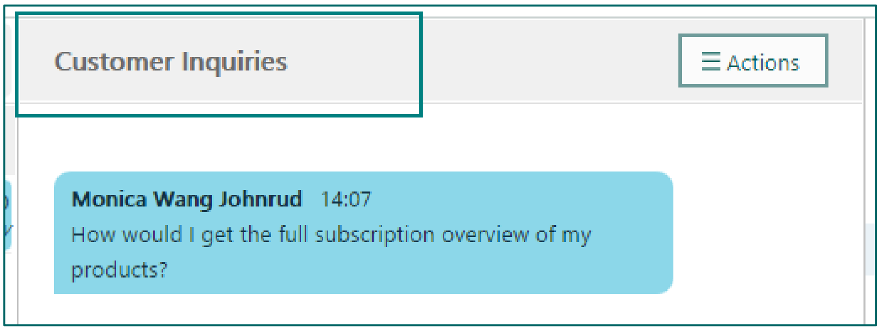
When setting up the chat widget, you have a possibility to show the agents name in the Nickname field or only the first name.

This is to prevent to show the full name of the agent and possible misuse of that.

The **nickname** is usually the same as the **UserId**, but can be changed to a better name:

- Off = Nickname
- On = First name

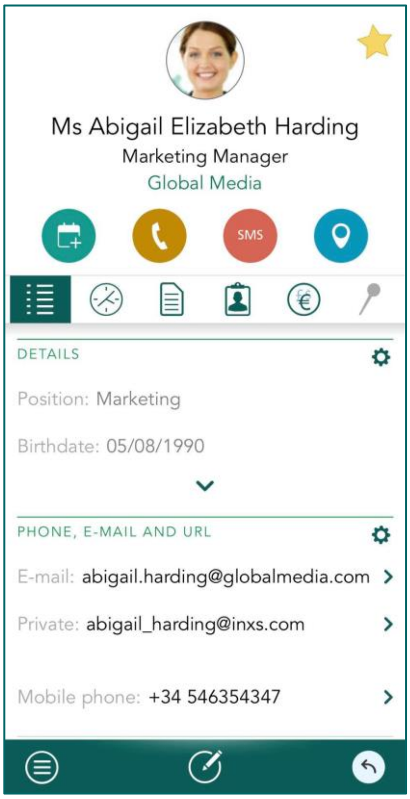
Chat – Showing the chat channel in the overview (9.2 R12)



For the agents working in the Chat screen, it's often valuable to see the name of the chat channel the chat came from.

Knowing the chat chanel the agent knows more about what type of questions the customer will ask, and give better answers to them.

Mobile CRM – SuperOffice has launched a new CRM app (10.0.1)



We have released a new mobile CRM app: **SuperOffice Mobile CRM**

To be able to use the new app you need to use:

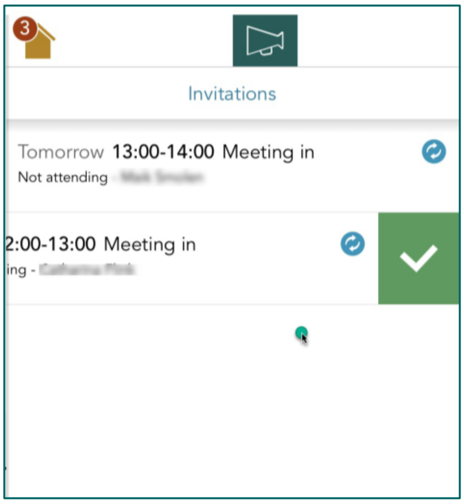
- SuperOffice CRM version 9.1 or newer
- Android OS: version 5.0 or newer
- iOS: version 10.0 or newer (iPhone 5S or newer)

You can recognize the new Mobile CRM app from the green SuperOffice logo.

Our previous CRM app, Pocket CRM, will still be available and show data from your SuperOffice database when you use SuperOffice 9. However, we will not develop new features for Pocket CRM.

You can download **SuperOffice Mobile CRM** from the App Store or Google Play.

Mobile CRM – “Confirm” swipe action on recurring meetings (10.0.2)



Confirm swipe action added to cancelled recurring meetings. **Cancelled recurring meetings** are faster to confirm with a new swipe action feature added to SuperOffice Mobile CRM.

When you receive a cancellation notification, **swipe to the left** and a tick option will appear. Simply click on the tick to confirm.

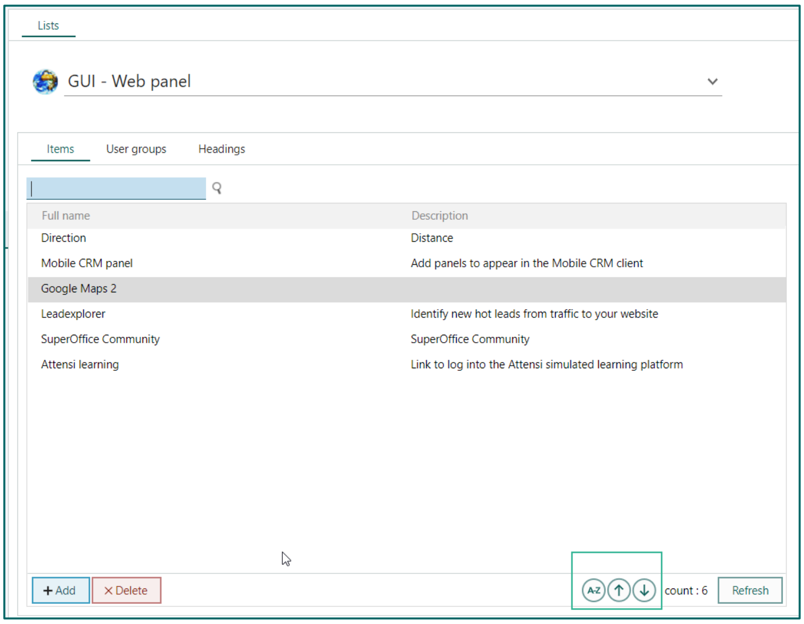
Mobile CRM – Multitasking on an iOS and iPadOS (10.0.2)

Users of SuperOffice Mobile CRM installed on an iPad that supports multitasking will now be able to run the app together with other apps in a **Split View**. Split View allows you to display two apps on the screen in their own re-sizable panes.

Mobile CRM – Business card scanner supports QR Code Scanner (10.0.2)

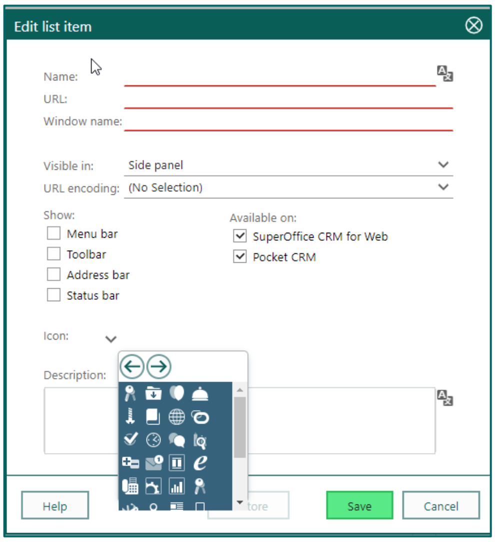
The **business card scanner** in the SuperOffice Mobile CRM app now supports **QR Code scanning** – making it even faster to scan and add a new contact.

Mobile CRM – Rank your WebPanels (10.0.2)



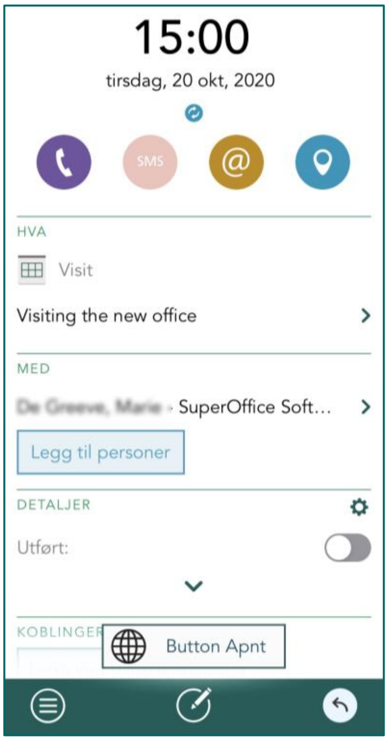
WebPanels added to your SuperOffice Mobile CRM application via your **SuperOffice Settings and Maintenance** can now be **ranked** and chosen in a preferred order.

Mobile CRM – Choose icons for Web.Admin for WebPanels (10.0.2)



Web.Admin for **WebPanels** now **contains icons** you can choose from for the Web panels added to your SuperOffice Mobile CRM application.

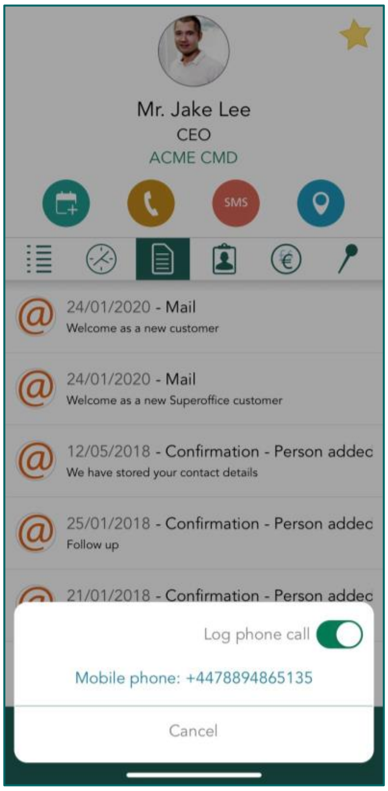
Mobile CRM – New header in the Appointment screen (10.0.3)



We have implemented a new and improved header to clearly show the date and time.

Action buttons have also been added for faster access to the most used functionality.

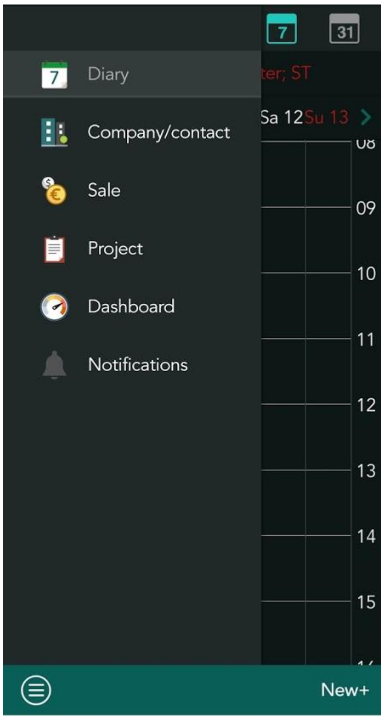
Mobile CRM – Improved user experience for Action buttons (10.0.3)



When you click on any **Action button** that takes you to another application, (e.g. Maps, e-mail) or starts a call or SMS, you will now go through an additional step.

Before the action is carried out you will be able to see the address, e-mail, phone number etc that the **Action button** will use. You can then decide whether to continue with the action.

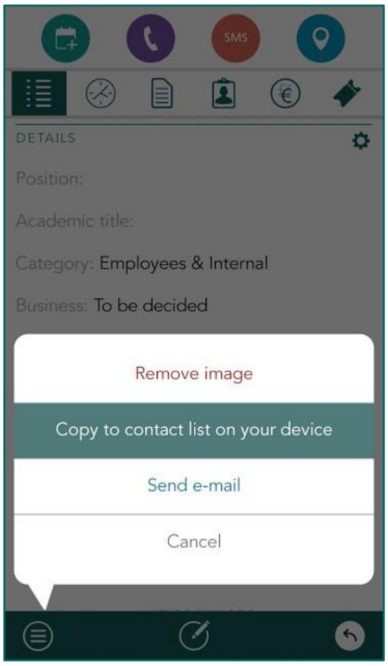
Mobile CRM – Dark mode follow phone settings (10.0.4)



If you have set your phone to use **Dark mode**, your Mobile CRM app will also use dark mode.

Pretty nice for those who love dark mode.

Mobile CRM – Save phone number to device from company screen (10.0.6)



Some **phone numbers** you find on the Mobile CRM app might come in handy to have stored on your device.

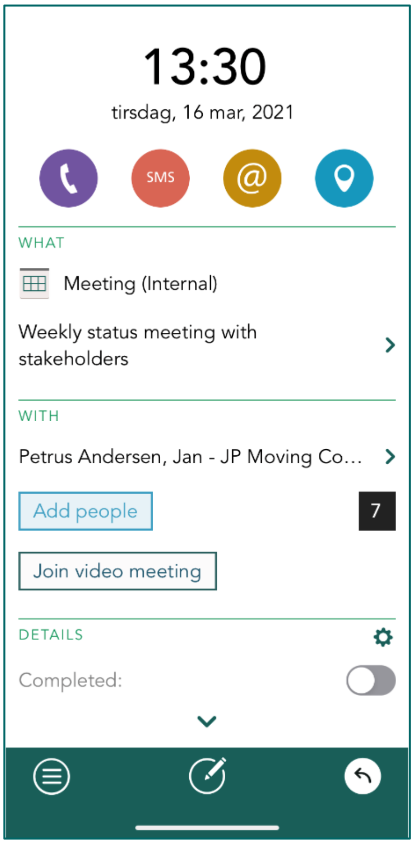
Find wanted company (or contact), go to **Task** and simply select:

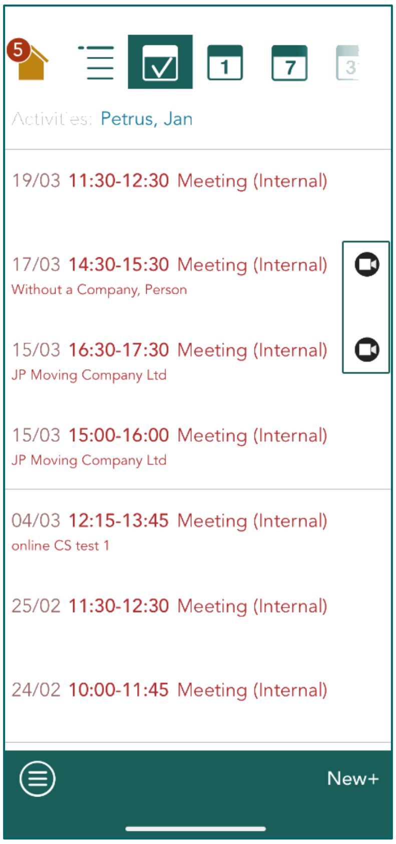
Copy to contact list on your device

Easy peasy!

If you choose to save a contact, you also get fields like birthday and some company details.

Mobile CRM – Join video meeting from appointment (10.0.7)



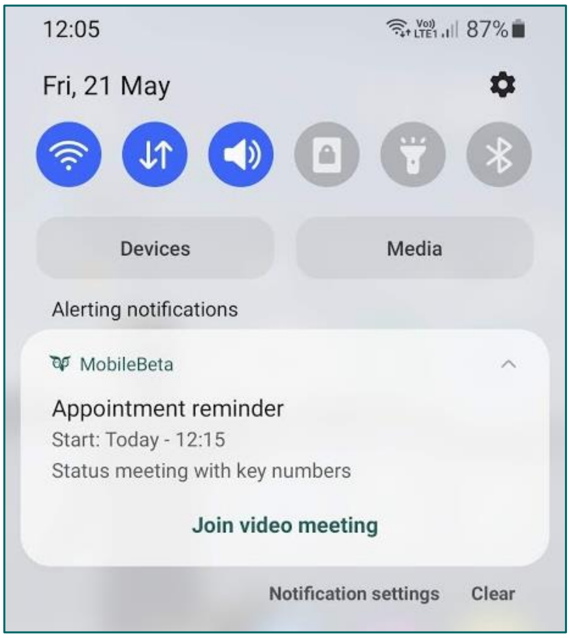


Using the **Video meeting** option in SuperOffice CRM, you can also **join** the meeting on the go with your mobile.

Open the appointment and click the button **Join video meeting**, and your device will select the best option to attend the video meeting, either with an app or with the browser.

The activity list also shows an icon to indicate which appointment that is a video meeting.

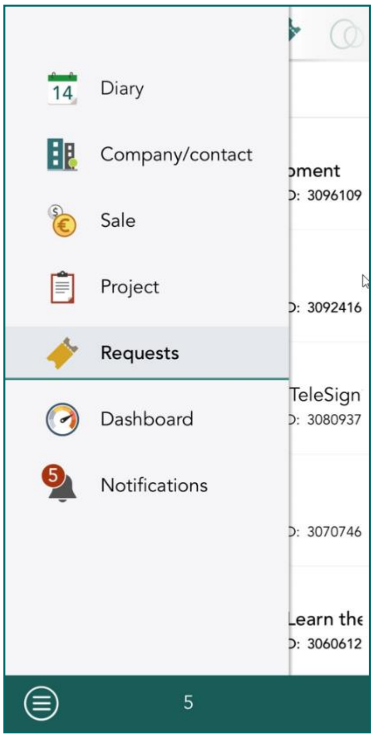
Mobile CRM – Notifications on Video meetings (10.0.9)

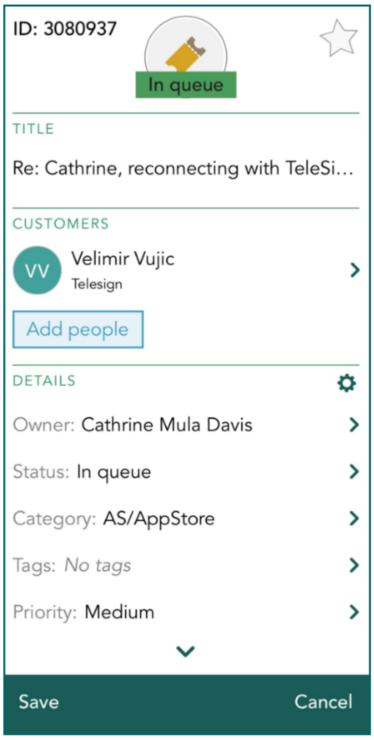


When you have set up Mobile CRM to give you alerts when meeting starts, a pop-up will appear on your phone. If you expand the message, you will see the **Join video meeting** link in the bottom.

It's so easy to just to click the **Join video meeting** button, and you are in on the go!

Mobile CRM – Request home page (10.0.8)





There is a request home page where you can easily search, find and open a request. You can search across all requests using keywords that may be found in the title of the request which is helpful if you don't remember what company or contact who submitted the request but remember what it was about.

Click on the person icon to view "My requests" which shows all your open requests with just one click. This will be an invaluable feature to help us always be on top of our own tickets.

It is also easy to see your favourite requests, like those that you are tracking with a star.

You can edit key fields in an individual open request to change the status, assign it to another colleague, add a tag and change the priority. We have also added the ability to add comments or respond to a ticket.

This is only available for pilot customers on Mobile CRM.

https://community.superoffice.com/en/customer/news/pilot-programs/current-pilot-programs/

Pocket CRM – No support between app and SuperOffice 9.1 (Pocket CRM 9.1.16)	
	Pocket CRM will not support NetServer version 10.0 and newer versions To use our pocket app with your SuperOffice CRM, you should install the app **SuperOffice Mobile CRM**.

NEW AND IMPROVED OFFICE INTEGRATIONS

SuperOffice for Outlook – Saving contact details with more fields (2.3)	You can save contact details with Mr/Mrs, title, company and department information.
SuperOffice for Outlook – Search for company will show department (2.4)	The **department** of the companies is shown, when you search for a company. It's easy to select the correct company/department.
SuperOffice for Outlook – Filter on search when linking to sale and project (2.5)	When you link an e-mail to a project or sale: The search list will show **projects** and **sales** that are linked to the Company / Contact. This is controlled with one **preferences** in settings menu in SuperOffice for Outlook, or Settings and Maintenance in the Client, section E-mail. Show contextual projects and sales.

API CHANGES

WebHooks – Include contact_id and person_id in activity.deleted (9.2 R03)

With the introduction of soft-deletes, the contact and person deleted webhooks were "broken". These events will fire when the entitiy has been permanently removed from SuperOffice.

- contact.deleted
- person.deleted

Because API consumers may still want to be notified and manage softdeletes, the following two new webhooks have been introduced:

- contact.softdeleted
- person.softdeleted

Added "Values" property to webhook for deleted events, to hold ID values from original record (if available).Deleted activities will now retain contact and person ID values. This will allow you to see which company or person the deleted activity was connected to.

For more info, see announcement in the forums and webhook reference.

WebHooks – Project member triggers/web hooks (9.2 R03)

Once you delete a project member, the “Number of project members” field is automatically updated and does not require scripting.

Deleted activities will now retain contact, person, project and sale ID values. This will allow you to see which company, person, project or sale the deleted activity was connected to.

Mass Operations

SuperOffice APIs supports the import and update of large datasets via the Mass Operations API. These APIs leverage database server features that are optimized for speed and efficiency.

See link in Community:
https://community.superoffice.com/en/content/content/netserver-sdk/netserver-9.x/massoperations/

Chatbot – CRMScript Chatbots (9.2 R08)

Chatbots are CrmScripts that can interact with chat sessions. Chatbot functionality in SuperOffice requires the AI license. This enables the Chatbot tab in chat administration.

Chatbots are folders that contain one or more CRMScripts with names that fit a pattern:
...bot register... signals the presence of a chatbot in the folder.
...bot session create... is called when a new chat session starts.
...bot session change... is called when the chat session changes state.
...bot message receive... is called when a new message is received.

The names of the scripts must follow this pattern, but they allow any prefix or suffix you want. echobot register, my bot registered, and BotRegister are all acceptable names for the registration script.

The CRMScripts are not called after the chatbot hands the session off to the queue for human processing. The bot message receive script is only called for incoming messages.

This removes the need for a bunch of book-keeping logic, simplifying the bot scripts.

See more about Chatbots here:
http://docs.superoffice.com/automation/crmscript/chatbot/index.html
https://community.superoffice.com/en/content/content/customer-service/crmscript-chatbots/

NetServer Logger requirements

NetServer has switched from using a baked-into-the-code logger to using an extensible plugin system of **ILogger** based loggers.

The old logger now lives in **SuperOffice.Logging.dll** but you can remove it, replace it, or add more loggers alongside it.

All the logger plugins are used - there is no preferential treatment among the ILoggers.

For web applications, **ASP.NET** will load all the DLLs in the bin folder automatically.

For **console applications**, you will need to add the plugins to the <DynamicLoad> section or add explicit references to make sure the DLLs are loaded and found by the class factory.

See more about the NetServer logger here:
https://docs.superoffice.com/api/netserver/logging/index.html