SuperOffice 7.5 What's new

CRM the SuperOffice way

Driven by a passion for customer relationship management, SuperOffice is one of Europe's leading suppliers of CRM solutions to the business to business market. Our software supports the individual user in achieving stronger sales, marketing and customer service productivity.

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Powerful, Simple and Efficient CRM

Back in 1989, it all started with one idea:

Creating a software which could support the needs of the sales person by making his everyday life easier.

We wanted to design a CRM so powerful, **simple and efficient** that an individual user actually wanted to use it – not because he or she had to. Thus, SuperOffice CRM was born. Now, 11.000+ users use SuperOffice CRM every day to support their growing customer base. Every day, we empower the users and **enable** them to create their business successes, while building outstanding customer relationships along the way.

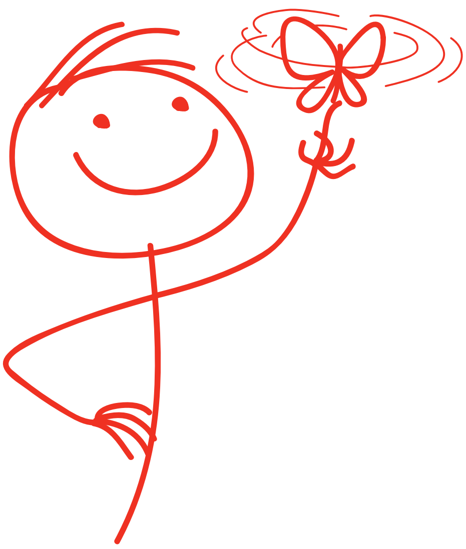
Today, we launch a new and improved version of SuperOffice CRM. A giant leap for businesses who wants to be more efficient, who want to streamline their workflow, who want to be able to meet their customers' increased demands and expectations while making more money in the process.

We give you SuperOffice 7.5

This release of 7.5 is the fruit of 25 years of CRM experience, dedication and passion.

SuperOffice 7.5 represents a new and improved way of feeding CRM into all corners of your business. 7.5 offers new features and improved functionalities that will impact all areas of your business from sales and marketing to customer service and general management. From the freedom of working on any preferred mobile device with a complete set of CRM functions to automatic and accurate forecasting with the brand new and powerful QUOTE Management.

SuperOffice 7.5 offers the power to change what needs to be different. This 7.5 upgrade provides you with the capacity to change status quo from good to better or from great to fantastic. Yesterday is history. Tomorrow is waiting. With SuperOffice 7.5, **we enable you.**



Summary of Highlights

SuperOffice version 7.5 not only includes major improvements and new features, but also marks the launch of our brand new module for quote management.

The highlights of version 7.5 include:

Quote Management -The SuperOffice Way

SuperOffice Quote Management is the long awaited module for users of SuperOffice Sales & Marketing. It contains all the powerful features needed to produce professional quotes in a faster and more efficient manner than before. It holds an open-ended product and price register and offers all the necessary features to complete the sales and quote process within our award winning user-interface. SuperOffice Quote is available as either a stand-alone module you can use "out-of-the-box" or as a solution integrated with your ERP system.

Integration Server and partner ERP connectors

Quotes, prices and products are entities closely related to ERP systems. Instead of replicating ERP logic into your CRM product, we have, instead, made it possible to integrate your ERP system in a secure and robust manner using the SuperOffice Integration Server and a number of standardized connectors developed by our ISV partners.

New and Improved Customer Service

The new version of SuperOffice Customer Service boasts an improved user interface, as well as new and improved features. This version offers new metrics to measure customer service performance, as well as helpful drilldown charts. You'll get more advanced script opportunities and a compact edition that adapts to smaller mobile devices.

Improved eMarketing

New powerful email marketing features will not only format your emails for smaller screens when opened on smart-phones and tablets, it will also track who clicked, converted or bounced from what device. You are now able to make selections based on these tracking results and craft targeted emails with messages tailored for your new selections.

New Web Administration Tool

Version 7.5 includes a brand new web-based administration tool for Sales & Marketing that not only will make it easier for IT to manage your SuperOffice solution, but also includes a number of improvements in the way you can manage and develop your CRM solution. The new web administration tool includes improvements in your document template management, a new import wizard, easier creation of user-defined fields and lots of other features that help your administrators optimise your solution better.

Improved and Faster Web Version

We have taken measures to improve speed and user-experience when working through a web-browser. This web version is faster and also is far more touch enabled to support mobile devices and touch screen laptops.

Improvements to make your everyday life even easier

Lots of smaller improvements have been made that solves various issues and wishes made by all our users. This include improvements in how multi-languages are handled in documents, and now let web users instantly see how many items they have in a selection or activity tab. All the latest web browsers and Office versions are supported.

This 7.5 upgrade provides you with the capacity to change status quo from good to better or from great to fantastic.

Enjoy!

Brand New Products with 7.5

1. SuperOffice Quote Management; Quote - Click - Close

Feedback from our users told us that they needed a far greater tool to produce, send and follow-up on quotes than available today. In particular, we heard:

"My main task as a sales rep is to make and follow up on quotations"

"I need a tool that makes it easy and efficient to make a quotation"

"When a quote is accepted, I want to place the order with a single click"

"The prices and discounts we offer, should follow a pre-defined set of rules"

"To me a quote is a set of products with prices I can relate to"

"We need full control of all current quotes out there"

"We want a uniformed and professional layout on all quotations we send out"

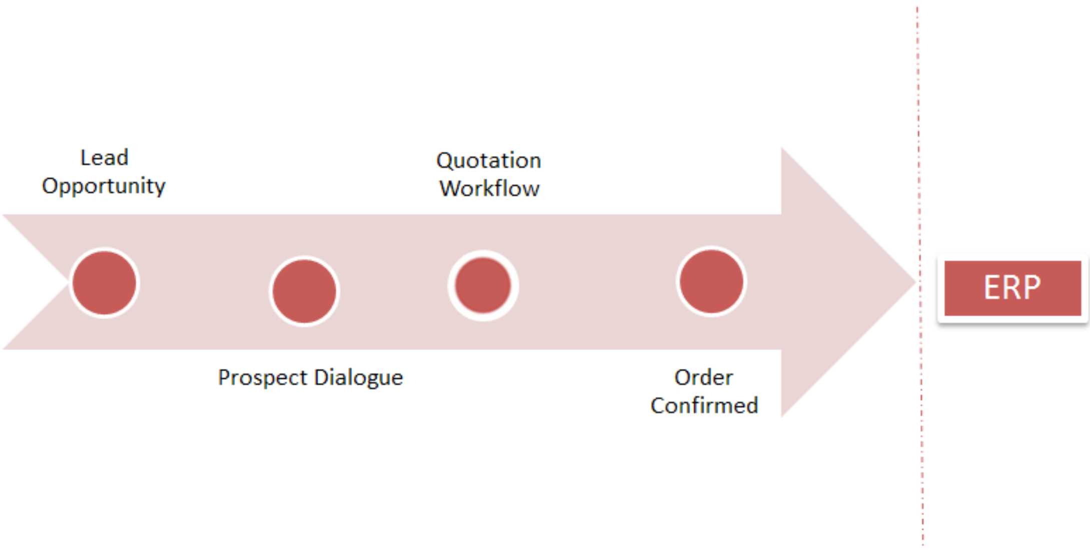
"We need to forecast and report on a product or product group level"

With SuperOffice Quote Management, we have developed a new and much easier, faster – and at the same time, more accurate way of generating and sending quotes. Quote has been developed with a focus on usability and simplicity, and in true SuperOffice style, you can easily get from approved quote to finished order in one click!

Introducing a quote system brings us much closer to the world of articles, pricing systems, discounts, logistics and order management. Most of these issues belong to – and are well taken care of, as part of your (or your accounting partner) Enterprise Resource Planning (ERP) system. However, an efficient, user friendly quote process belongs to the system salespeople use every day: namely the CRM system!

SuperOffice Quote Management is packed with powerful features to support all your activities related to the sales and quotation process to the point where your quote becomes an order.

If you want a more detailed overview of the capabilities, the benefits and how you may implement your quote management system into your organization, please download and read "SuperOffice Quote Management – an introduction".



Brand New Products with 7.5

2. SuperOffice Integration Server and Partner ERP Connectors

SuperOffice Quote can be used straight out-of-the box.

On the other hand, there are also companies who want the capability to integrate SuperOffice Quote with their ERP system. If it makes much more sense to pull the information on discounts, pricing, articles, directly from your ERP system, or to synchronize customer and supplier data, then you want to look at an integrated solution. If you choose to integrate SuperOffice Quote with your ERP solution, you will need SuperOffice Integration Server along with one or more of the certified connectors provided by our Independent Software Vendors (ISV).

Let's take a look at each one.

The SuperOffice Integration Server
The SuperOffice Integration Server is a product designed to handle integrations with other systems like your ERP system. The SuperOffice Integration Server provides two main integration points:

- Integration between SuperOffice Quote Management and ERP systems covering articles, pricing, discounts and to automate order creation in your ERP system ready for invoicing.
- Two-way synchronization of contacts (companies), contact persons, and projects.

These integration points are handled in a Quote Connector and Sync Connector which are developed as standard products for different ERP systems, delivered by our certified ISV partners.

Partner Connectors for Quote and Sync
A Quote Connector is a software module that enables communication between SuperOffice CRM and a specific ERP system. SuperOffice works closely with a set of ISV partners to ensure there are integration modules to the most commonly used ERP systems in the market. SuperOffice certifies these partners and their connectors. At the time of the release of SuperOffice 7.5, we have cooperation with 5 launch partners:

These partners are:

Adwiza — from smart to excellent
Siteshop
KeyForce
InfoBridge Software
Business Analyze

The above partners offer standard Quote and Sync Connectors to the following ERP systems:

- Visma Business
- Visma Global
- Mamut
- Microsoft Dynamics AX
- Microsoft Dynamics NAV
- Microsoft Dynamics C5
- Exact
- e-conomic

And Business Analyze offer new dashboard reports in the SuperOffice Analyze module that reports valuable business insights on products, prices, earnings. Gain new overviews and drill-down reports to analyze and facts to support your business decisions. These reports work independent upon whether you choose a stand-alone or an integration solution for SuperOffice Quote Management.

For more information about SuperOffice Integration Server and partner connector products, please see the document "SuperOffice Quote Management – an introduction".

SuperOffice Customer Service

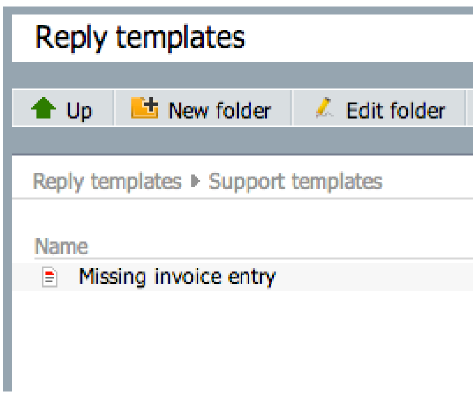
3. New and Improved SuperOffice Customer Service

Users of SuperOffice Customer Service and SuperOffice Customer Service for IT Help Desk have a large number of new features and improvements to enjoy when they upgrade to 7.5. These include the following highlights:

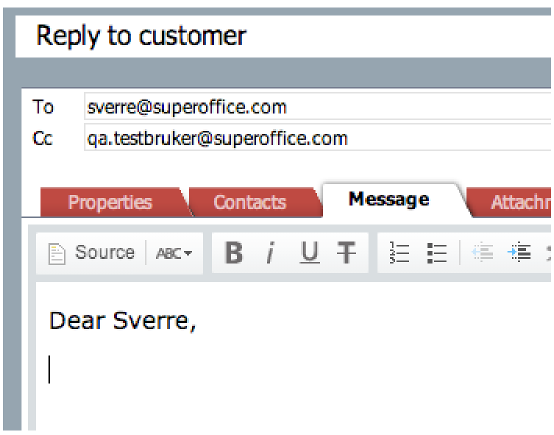
- Improved user interface and design to make it easier to read and manage the information available.
- Various small new or improved features to help you register respond and handle requests better than before.
- New Request metrics that let you measure more and easier than before.
- Streamlined roles and groups to improve how you manage your users.
- New searching and listing control that utilizes the screen better and offer improved displays.
- Compact mode that allows you to use Customer Service from smaller devices.
- Extra menus and web panels that increase how much and how well information is displayed.
- SuperMacro and Event handlers to increase the flexibility in your system.

Each of these improvement areas are described in more detail below:

Improved User Interface and Design



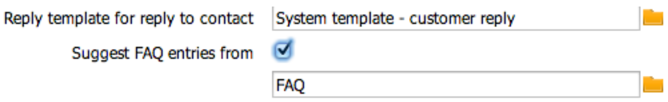
List view for all Knowledge base entities
Documents, entities and other templates in the Knowledge base is listed one folder at a time instead of in a long tree structure. You can navigate up and down the folders just like in a regular file explorer. This makes it much more manageable when you start getting a few entries.



Show recipients on top of New request/Reply to customer/Edit request screen
When responding to a request, we have now made it easier to see who will get a copy of what you write on email/sms, by listing these recipients above the tabs (making them visible all the time).

This is probably what you are used to from most email clients.

Various Small New or Improved Features



FAQ on mailbox

It is now very easy to configure that suggestions from the FAQ database should be included in the automated email reply for new requests. Just tick the checkbox for the mailbox and choose a branch (or the entire) FAQ.

Our new default reply templates include support for FAQ entries out of the box. This allows you to add new FAQ faster than before so you can increase your knowledge base to offer more self-help or faster responses.

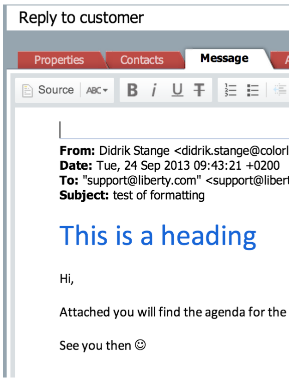
Block re-opening of requests for given statuses

Prevent old requests from becoming incorrectly reopened just because customers are responding to old emails. For chosen statuses, you can now set the system to create a new request instead of reopening the existing one.

Default font in the WYSIWYG editor

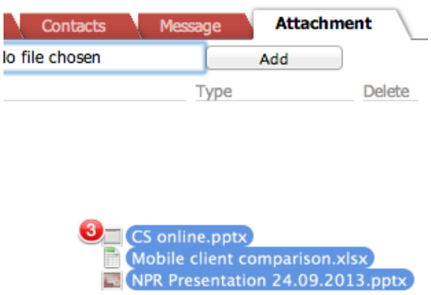
We have improved the WYSIWYG editor so that the font is set on the total "message document", not just a paragraph. You will no longer have problems with getting mixed fonts just because you moved the cursor outside the default paragraph.

SuperOffice Customer Service



Keep formatting when replying

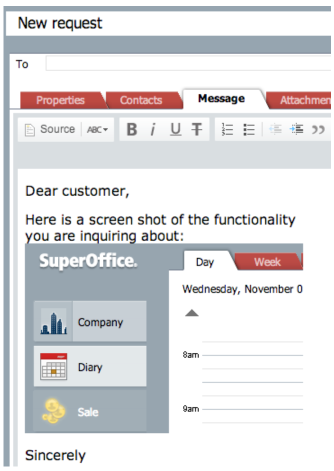
The styles of inbound emails now retain the look of the original e-mail when you reply to them. This makes the communication between an agent and a customer more visually correct. This is a detail that offers a better customer experience.



File drag & drop to attachments

Drag and drop files to the attachments tab of the New request/Reply to customer/Edit request screen. This is a faster way to add attachments to your requests.

Note: This only works on HTML5 supported browsers such as the latest version of Chrome or Firefox.



Paste image directly into WYSIWYG editor

If you use Chrome as your browser, you can now take a screen shot of all or parts of your screen, or copy an image from any other source, and paste it into your request message in line with your text. This makes it much easier to create informative and visual replies to requests.

Note: This functionality only works on recent versions of the Chrome browser. At present, no other type of browser supports this capability.

SuperOffice Customer Service

New Request Metrics

In Queue Internal External

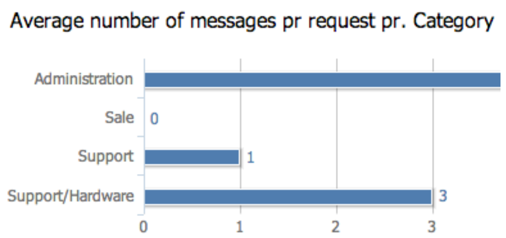
Track what time is spent in each Request stage

Knowing how much time a Request takes in each stage of the support process is important to identify bottlenecks.

We have created new fields on a Request entry so you can measure how much of its resolution time was spent when the Request was either

- In Queue waiting to be handled
- In the Internal resolution stage
- In the External resolution stage

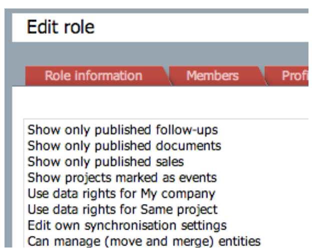
To meet different support times, we track time both according to the configured working hours, as well as 24x7. The built-in request reports have been extended to include reporting on these new fields.



Number of messages and replies

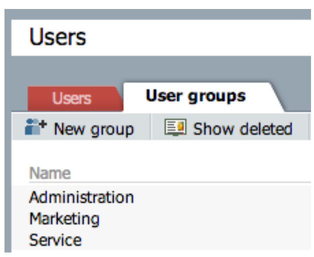
We have created new fields to keep track of the number of messages and replies for each request. This will help you to identify long requests in the Request overview quickly. You can also report on Request length and FCR (first call resolution). Reducing the number of replies on Requests is one way to improve support efficiency.

Streamlined Roles and Groups



Merged roles

SuperOffice Customer Service now uses the same roles as SuperOffice Sales & Marketing. User access is configured through the functional rights for the roles, and not individually as before. This centralizes and streamlines user management across the whole CRM system.

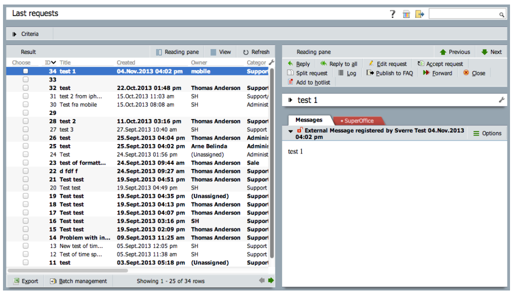


Merged user groups

SuperOffice Customer Service now also uses the same user groups as SuperOffice Sales & Marketing. A user will have a primary group, and can also have any number of secondary groups. Category membership can be controlled through user groups (both primary and secondary), as well as on an individual level. This also centralizes and streamlines user management across the whole CRM system.

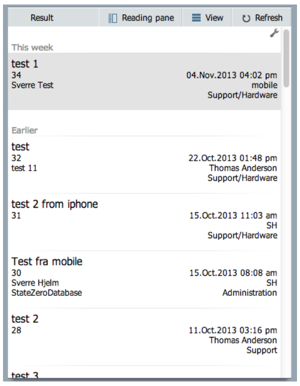
SuperOffice Customer Service

New Searching and Listing Control



Right positioning of reading pane

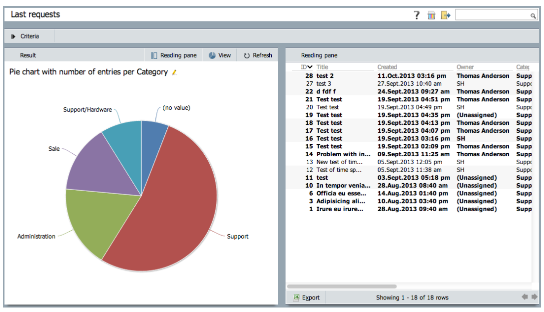
You can choose to show the reading pane to the right instead of below the list of found entries (Requests, persons, contacts, etc.). This layout is more fits better with modern screens, and resembles how many email clients works.



Listing the results as a multi-line list

Instead of a single-line grid, you can show found entries in a multi-line list which displays more information for each entry. The list is configurable, and also supports dynamic grouping on dates (e.g. "Today", "Yesterday", "Last week", etc.).

This is a more comfortable way of viewing the results, and resembles how many email clients works.



Listing the results in a chart with drill down

Found entries can also be shown in a chart (pie, line, bar or column), which can be configured to count/sum/group on any chosen data fields. In this mode, you can click on a segment of the chart (i.e. a pie, bar, column), and get the drilldown entries in the reading pane. It is also possible to hide the preview, to get more screen space for the chart.

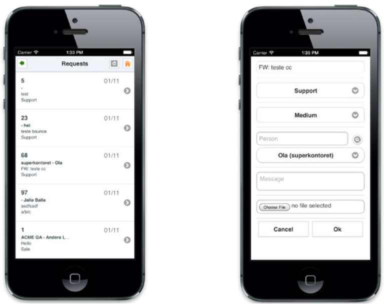
Saving the query as a selection

As before, it is possible to save the search criteria and result formatting as a selection. The new listing formats are also supported, which means that you can now save a selection which shows the number of open requests per category as a pie chart, also as a selection.

This selection can then be opened at any time, showing the current Request category distribution in an updated chart. Selections may also be used in web panels, as explained further below in this document. This functionality offers a greatly improved level of instant reporting in the system.

SuperOffice Customer Service

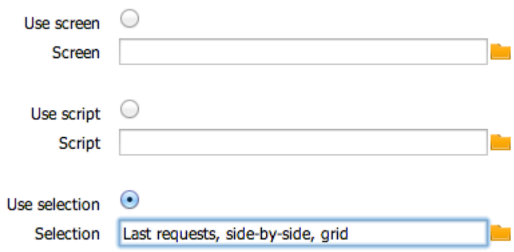
Compact Mode



Compact mode

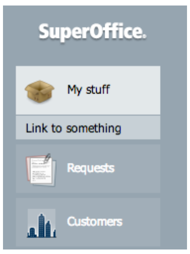
SuperOffice Customer Service now supports being accessed from mobile devices, such as smartphones and tablets. The system will automatically detect these devices in the login screen, and redirect the user to a compact version of the user interface which offers a subset of the functionality, adapted for small screens and touch. This is not a new module, nor is it an app, but instead a new mode of our software which adapts to smaller devices, similar to how certain web sites does.

Extra Menus and Web Panels



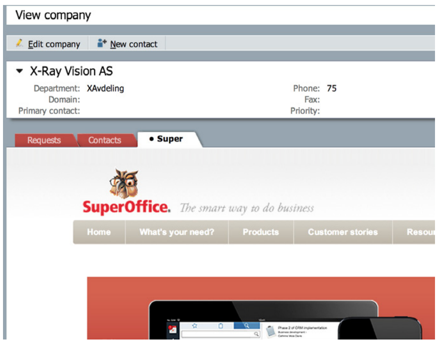
Extra menus

We have improved the functionality for creating extra menus under System design. When you create an extra menu now, it is possible to directly choose a custom screen, a script or a selection. This makes it much more user friendly to create these extra menus and customize a SuperOffice Customer Service installation.



Extra groups and menus in the Navigator

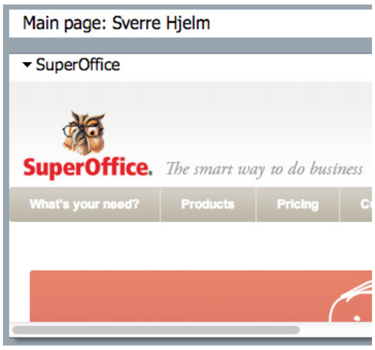
We have added support for also creating new groups and menu items in the Navigator. This makes it much more user friendly to create these extra menus and customize the SuperOffice Customer Service installation.



Web panels in View screens

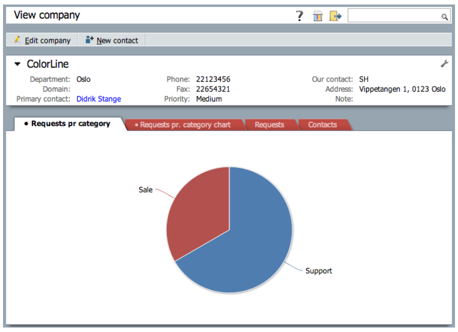
We have added support for creating web panels in the screens for viewing Requests, Persons, Contacts or Extra tables. The web panels will be placed in the major tab control, in the configured order. The web panels can be configured to display specific content for the current contact or person using a defined criterion (parameter) in the URL.

SuperOffice Customer Service



Web panels in Start screen

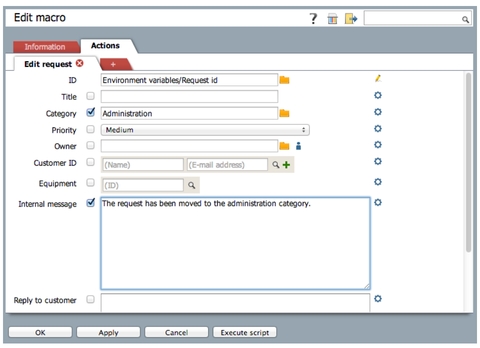
We have added support for creating web panels in the Start screen. These web panels will then become available in the list of content to choose from for each of the four quadrants. The web panel can be configured to show relevant content for the individual user or user groups. This also makes it much easier to integrate SuperOffice Customer Service with other solutions userinterface.



Using selections with extra menus or in web panels

We've added a new parameter which allows you to further narrow your selection, e.g. specifying that is only show requests for a given contact. You can use this to create a selection of Open requests pr. Priority shown as a bar chart, and then place this selection in a web panel in the View contact screen, parameterized with the Contact id, so that the selection will only show the chart for the given Contact. Consequently, this single selection can be used for all companies.

SuperMacro and Event Handlers

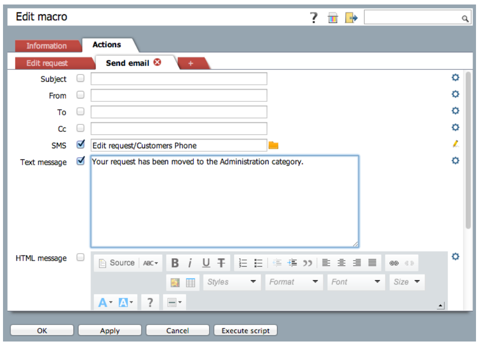


SuperMacro

We have created a new level for customizing SuperOffice Customer Service to automate tasks. From earlier, we have support for ejScript which allows for programming how the system should automate certain tasks. We now introduce SuperMacro, which is a visual user interface for creating scripts for certain frequently used tasks.

Instead of having to program the scripts, the macros are defined using regular input fields. It is also possible to configure input fields to an action to originate from a parameter rather than a fixed value.

SuperOffice Customer Service



SuperMacro chaining

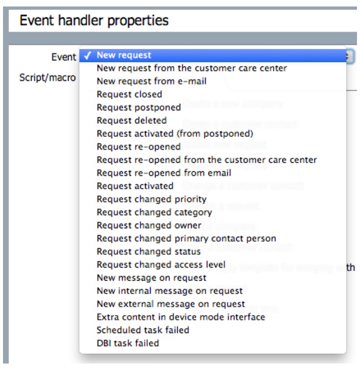
A macro can contain more than one action. If you create multiple actions, then they are executed sequentially. Any action can use output parameters from an earlier action as an input parameter. This allows for “chaining” parameters between actions.

Executing SuperMacros

A macro will be saved just like an ejScript, and it can also be executed just like an ejScript (technically it IS an ejScript). This means that a macro can be executed anywhere a script can be executed, such as:

- From an extra menu item, e.g. in the “View request” screen.
- When a request is escalated through the alert levels for the priority.
- As a scheduled task.
- When triggered by an email filter.
- When you click a submit button in a custom screen.
- When a recipient clicks a tracked SuperOffice eMarketing link.

A very common scenario of using macros is to automate a Request handling which is frequently performed. You can now create a macro which modifies the Request (e.g. changes category, status, priority etc.), and adds a response to the customer. You then create an extra menu item for the “View request” screen which will execute the macro.
With SuperMacro, you can customize SuperOffice Customer Service to specific needs faster and without having to know programming.



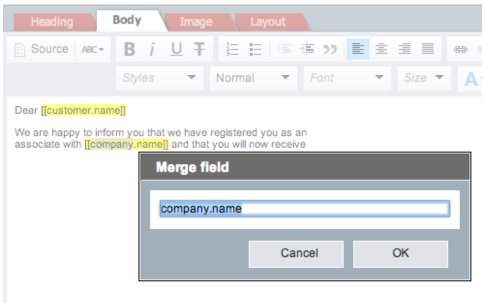
Event handlers

We have introduced a new large group of events in the system, which can trigger execution of macros or scripts. These events allows for easily customizing if-then-do-that business rules in the system.
Together with SuperMacro, this level of customizing is now available for regular administrators without having to know programming.

SuperOffice eMarketing

4. Improved SuperOffice eMarketing

SuperOffice eMarketing for 7.5 contains features to improve your user experience and the ability to better control how a mailing is executed. Here are the main highlights:

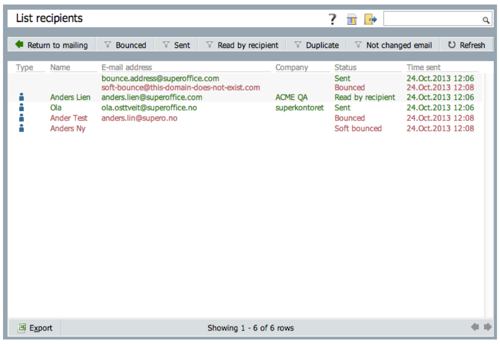


New merge field format

We have introduced a new format for merge fields that is more fail proof and will make editing easier. Merge fields are now surrounded with double square brackets, and will show up highlighted when viewed or in the editor. Editing a merge field is also now done in a separate dialogue to prevent typing errors.

Soft bounce detection

SuperOffice eMarketing now detects soft bounces (delivery delays, temporary mail server unavailability), and differentiates them from hard bounces (incorrect address, unknown domain, etc.). Both types of bounces can be viewed in the list of recipients.



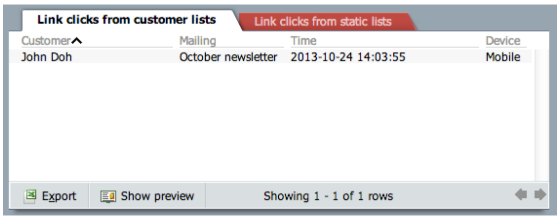
List recipients filtering

It is now possible to filter the list of recipients on all statuses. This means you can get a list of all emails that are sent, bounced, or waiting. We also support filtering out addresses that have been modified in SuperOffice Sales & Marketing after the mailing. This gives you a list of all the bounces which still need to be “cleaned”. Using any combination of the filters is possible, and the result can be exported to a selection in SuperOffice Sales & Marketing.

Improved speed for recipient list generation

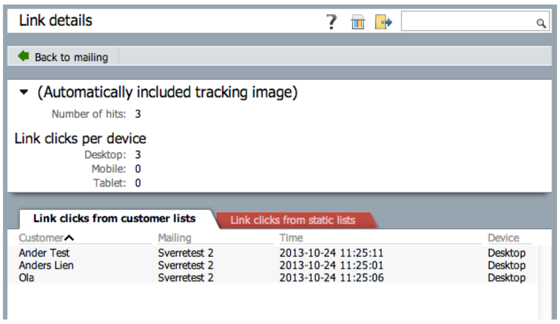
The time it takes to generate the list of recipients (after clicking Ok in the “Choose recipients” screen) has been greatly reduced.

SuperOffice eMarketing



Tracks device for links

We now track whether recipients are clicking on links from a mobile, tablet or desktop browser.

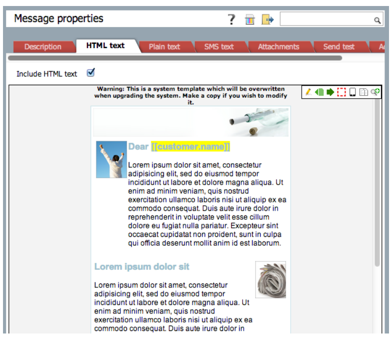


View recipients for the automated tracking image

It is now possible to list the recipients who have opened the email (through the included tracking image).

Merged the “No mailings” and “No eMarketing” fields

We have now merged these two fields in the system. Any person with one or the other ticked will now have “No mailings” also ticked. The “No eMarketing” field has been removed.



Support for special formatting on smartphones

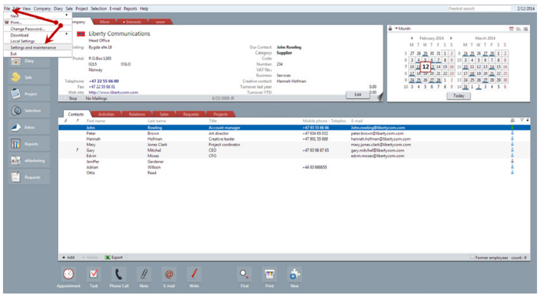
It is now possible to specify specific formatting options for devices with small screen (i.e. smartphones), such as extra-large fonts and paragraph wrapping, which will make the newsletter easier to read. When editing the newsletter, there is a menu item for previewing this formatting mode.

Full accessibility from SuperOffice Sales & Marketing

All areas of the SuperOffice eMarketing module, including help and settings, are now available when accessing the module from your SuperOffice Sales & Marketing client. No SuperOffice Customer Service user access is required.

5. New Web Administration Tool

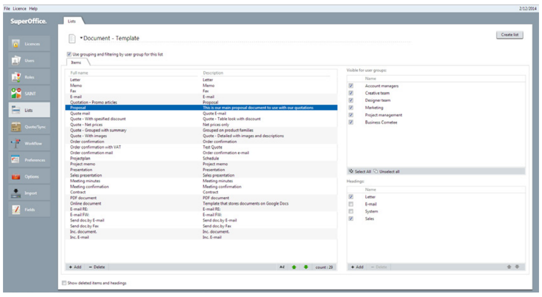
Not only will this version of SuperOffice Sales & Marketing be faster for our web users, it comes with a much improved and all web based administration tool. The Windows based version of the administration tool is a thing of the past, and the new version is not only web enabled, but greatly enhanced as well. The tool gives you:



Easier access to your Administration module

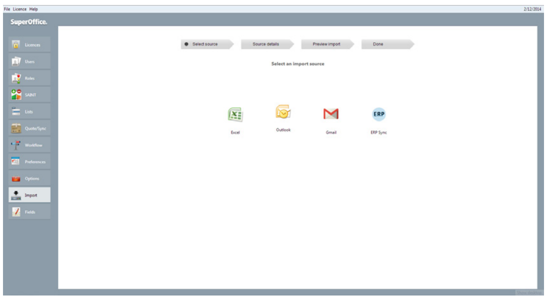
With the Administration module being available in a browser, the users with administration rights can access this directly from their SuperOffice view.

Just click on File and select "Settings & Maintenance" to enter the Administration mode. Whenever you update or make changes, simply update your browser



Faster and better document template management

Upload, create and update your templates directly in the new settings and maintenance interface. No more hassle with copying files to the right directory and manually creating the template lists. Everything is done in a carefully designed workflow that lets you concentrate on the contents and looks of your template, and nothing else.

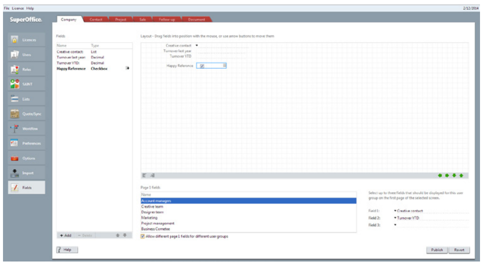


Easy import of contacts

Now there's no need for IT-specialists, programming, or complex files – just point, click, choose and import! The configuration and setting tool contains a brand new import wizard that offers an easy to use import of contacts directly from an Excel file, Microsoft Outlook, Gmail, or the Address Book on Mac.

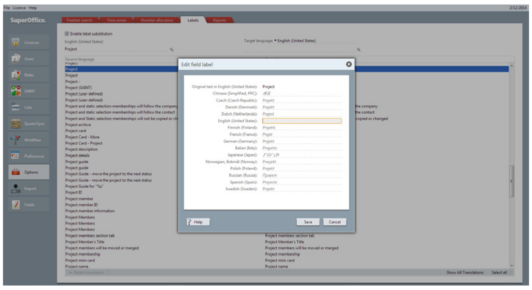
This provides the possibility of both importing your existing central customer database (just load it into Excel first!) and also build your new CRM contact database from several personal contact registers.

SuperOffice Sales & Marketing



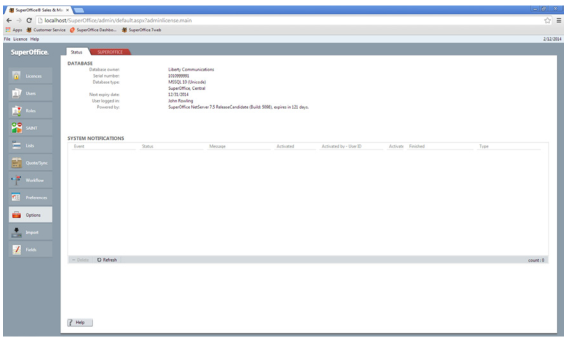
Drag’n’drop User-Defined field

If you have ever customized your solution using “user-defined fields”, you know that it can be quite a challenge to get it right. In this latest version of SuperOffice Sales & Marketing for web, you can easily design how you want to place your user-defined fields and simply drag’n’drop the fields to get them where you want them!.



Rename labels to suit your needs

A “field label” is the name of a data-field in the SuperOffice interface. One example is the label “Project”. If you think this is a label that is not appropriate for the way you are going to use the Project panel in SuperOffice, you can change it to what suits your needs. For some of the fields in SuperOffice, this has been possible for quite a while, but in this version ALL fields can be changed – for all languages in use.



Improved user and license administration

When you extend your SuperOffice solution either by increasing the number of users or buying additional functionality, you will need a new license key to activate your new features. In ancient times the new license key had to be entered into the Admin application manually. In this version, everything is automated. When you buy a new user or module, we will automatically send you the new license key and all you have to do is to click a button and accept it.

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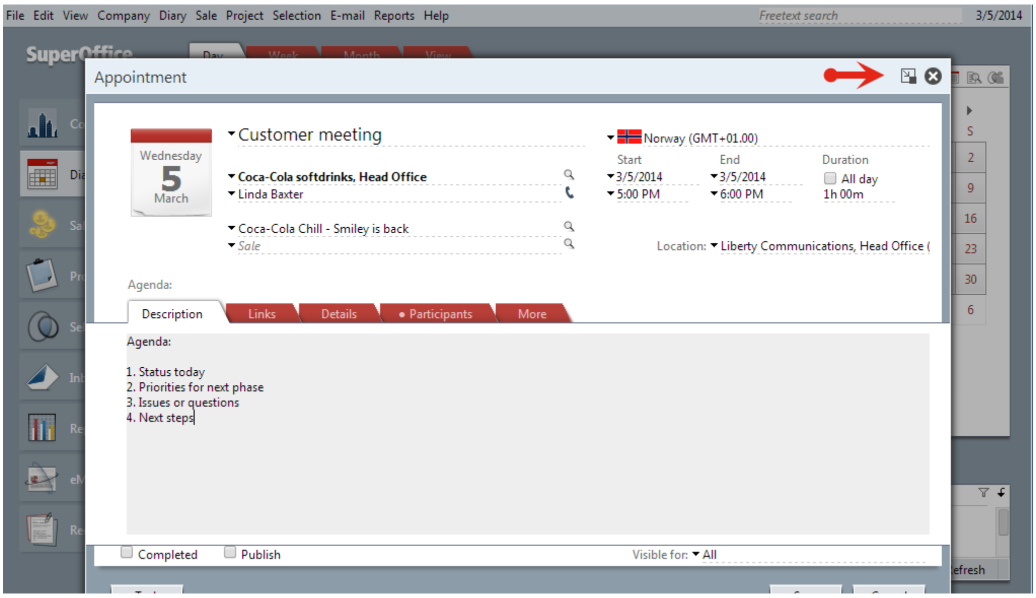
6. Improved and Faster Web Version

The world's appetite for internet speed is ever increasing. Internet speed depends upon a range of factors such as available internet broadband access, additional applications running on your computer or in your network, the size of your SuperOffice database, and so on. In version 7.5 of SuperOffice Sales & Marketing, we have looked at factors we can change in our software to improve speed.

In particular, we have changed the technology that displays all dialogue boxes such as the appointment, task, write and find windows in order to improve speed, as well as a few other benefits.

All main windows are now dimmed in the background and the dialogue window pop-up has a set size and fixed position. These changes help to make the contents of the box stand out better and you have an easier way of focusing on the content. You can also only have one dialogue box open at a time. This ensures that your current display do not get lost in open window displays or accidentally overwritten.

You now have the capability to minimize the top window when you are viewing several calendars to "Find" results. This helps to create more flexibility when working with different information displays.

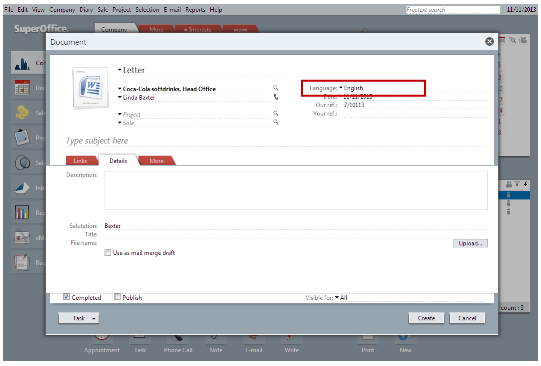


We have also implemented a number of other improvements, such as better java script libraries, instant updates to improve the overall experience of speed which we believe our web users will enjoy. Another improvement that is particularly aimed at web users is the increased touch enablement that we have embedded in the software so that tablet users in particular can enjoy SuperOffice Sales & Marketing web on their tablet.

Other Improvements

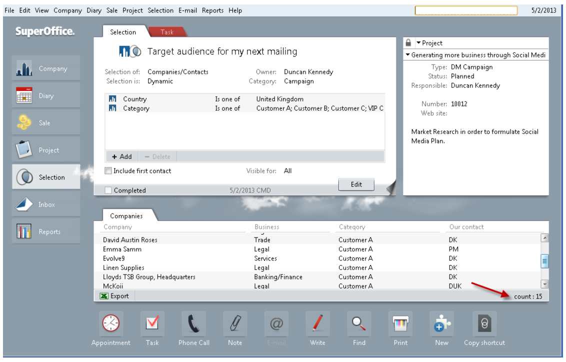
7. Other Everyday Improvements

With every new software release, we fix a number of issues which make the ‘every day’ use of our software easier and more user friendly. Many of these improvements have also been requested by our customers and were included in this new version. Some new features worth noting are:



Multi-language documents in a click

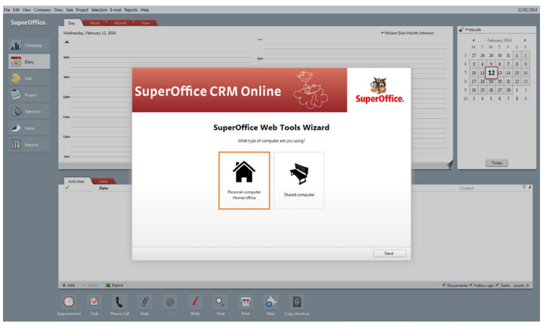
Whenever you need a template in a different language, all you have to do is to pick from the available languages connected to a template. Provided the template is available in more than one language, responding to a customer in a different language is now easier than ever.



Instantly see the number of items in your selections.

A small but important feature is the new counter that counts all items in all archive tabs. This includes the tab for activities, contacts, relations - and most importantly, selections.

When you now create a new selection, you will instantly see how many items the selection resulted in, making it easier to know the value or correctness of your criteria.



Improved web tools and easier update of these

We have brushed up the web tools, previously referred to as “Productivity tools”, to make them even more streamlined, perform better and are even easier to use. In specific, the signature problems in e-mails are now fixed, you can save all attachments in e-mail in one click. The document link is a lot faster than before. In addition, your solution detects which version you are running and helps you update your web tools to the latest version.

Note: We only offer limited support for Outlook 2003 or older and we strongly advise all our users to upgrade their Outlook to version 2007 or newer.

Support for the latest browser technologies

With the latest update, you can run your SuperOffice Sales & Marketing for web using the latest version of Internet Explorer, Chrome, Safari, and Firefox as well as be sure that Windows 8 and Office 2013 are fully supported.

CRM the SuperOffice way

www.superoffice.co.uk

Driven by a passion for customer relationship management, SuperOffice is one of Europe's leading suppliers of CRM solutions to the business to business market. Our software supports the individual user in achieving stronger sales, marketing and customer service productivity.