

SUSTAINABLE CUSTOMIZATIONS

Automate your work processes



Today's host:



Jeanette Small Strøm

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Agenda

Introduction

Why use customizations and automations in SuperOffice?

Focus areas

Different types of automations
Integrate SuperOffice with other platforms or data sources

The road ahead

How to get started

WHY USE CUSTOMIZATIONS AND AUTOMATIONS IN SUPEROFFICE?

**SuperOffice CRM is
a standard software –
made to fit many**

Why invest in a customization?

- ✓ To support **individual needs** and unique work processes
- ✓ Add capabilities that provide **increased internal productivity, efficiency and effectiveness**, which may also lead to cost reduction
- ✓ Gain capabilities to **enhance customers experience** and/or increase your **competitive advantage**
- ✓ **Increase your ability to digitize and automate** business processes across departments and customer-facing processes

WHAT DOES SUSTAINABLE CUSTOMIZATIONS MEAN?

Sustainable

/sə'steɪnəb(ə)l/

Able to be maintained at a certain rate or level.

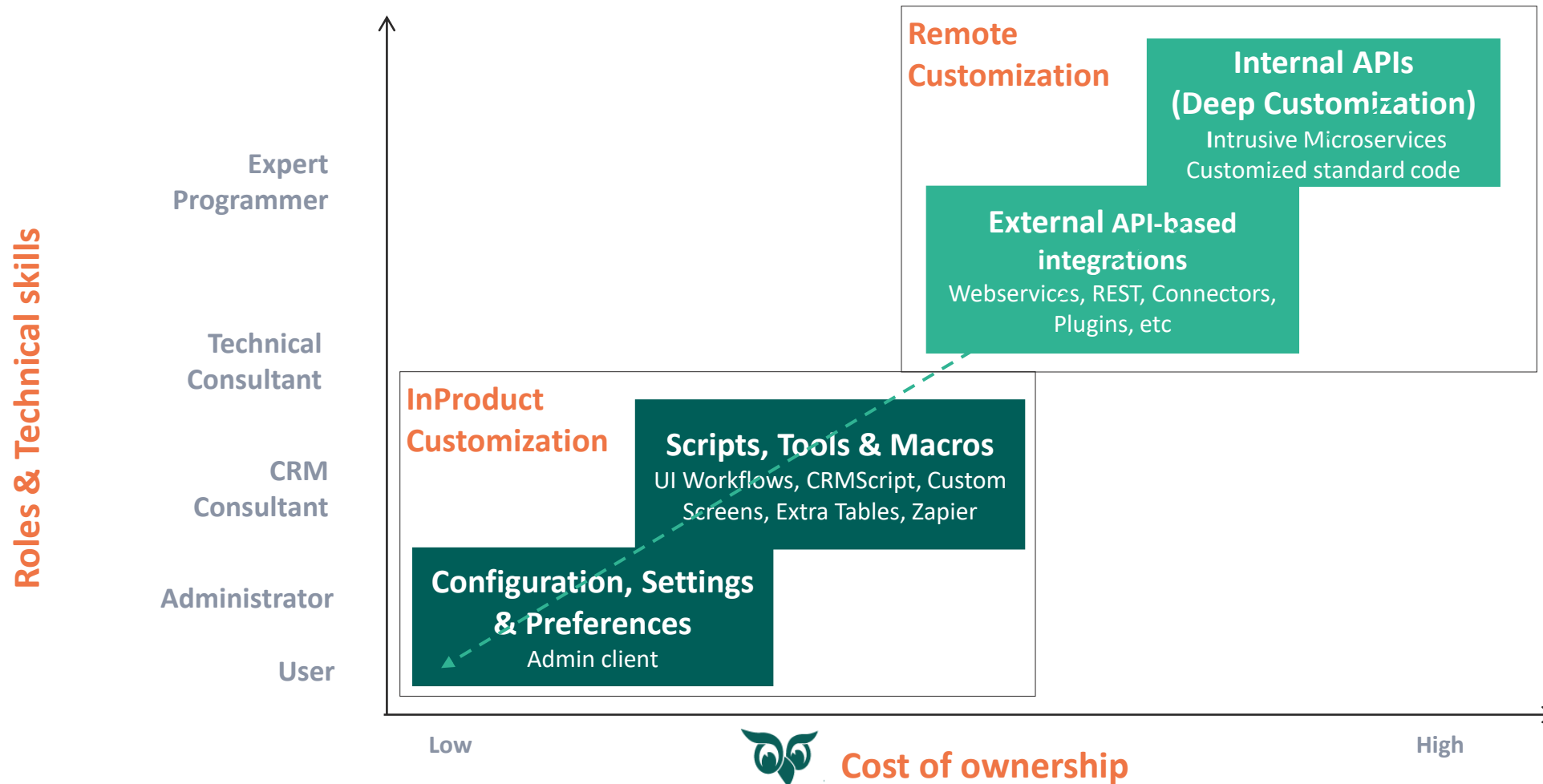
“ Sustainability focuses on meeting the needs of the present without compromising the future”

Guttorm Nielsen

Chief Product Officer, SuperOffice AS



Customization Tools



CRM SCRIPT

Automate tasks in or modify the behaviour of SuperOffice with CRMScript.

- Customize your workflows and automation
- Validate input
- Dynamically update content
- Run code in response to certain events on a website

```
%EJSCRIPT_START%<<

String personId = getCgiVariable("personId");
Integer interestId = getCgiVariable("interestId").toInteger();
Bool bSelected = getCgiVariable("selected") == "true";

if(personId.toInteger() > 0)
{
    NSPersonAgent pAgent;
    NSPersonEntity pEntity = pAgent.GetPersonEntity(personId.toInteger());

    NSSelectableMDOListItem[] mainInterests = pEntity.GetInterests();
    for(Integer i = 0; i < mainInterests.length(); i++)
    {
        String mainInterest = mainInterests[i].GetName().parseSOMultiLanguageString(0);

        if(mainInterest == "AKTIVE ABONNEMENTER")
        {
            NSSelectableMDOListItem[] interests = mainInterests[i].GetChildItems();
            for(Integer j = 0; j < interests.length(); j++)
            {
                if(interestId > 0)
                {
                    Integer currentId = interests[j].GetId();
                }
            }
        }
    }
}

```

Workflow – New person created



Send welcome e-mail

Send onboarding e-mail

Send resources e-mail

Wait 7 days

Add follow-up reminder

Wait 30 days

Welcome!

Welcome [[customer.firstname]]
thrilled to see you here!
We can't wait for you to start up
Bridgecom services and seeing
your business.
Simply go here [login page] to

As always, our customer success
be reached at cx@bridgecom.
ever get stuck.

Have a great day!

[[ourSalesContact.firstname]]

Phone call

Follow-up

Delta Insurances

Sebastian Hardacre

Project

Sale

A new person is added. What's next?

Description Details Participants Links More

A new person is added. What's next?

- contact the person
- schedule meeting
- send information

Remember welcome e-mails are automatically sent - day 1, day 3 and day 7

Start: 1/23/2022 9:00 AM

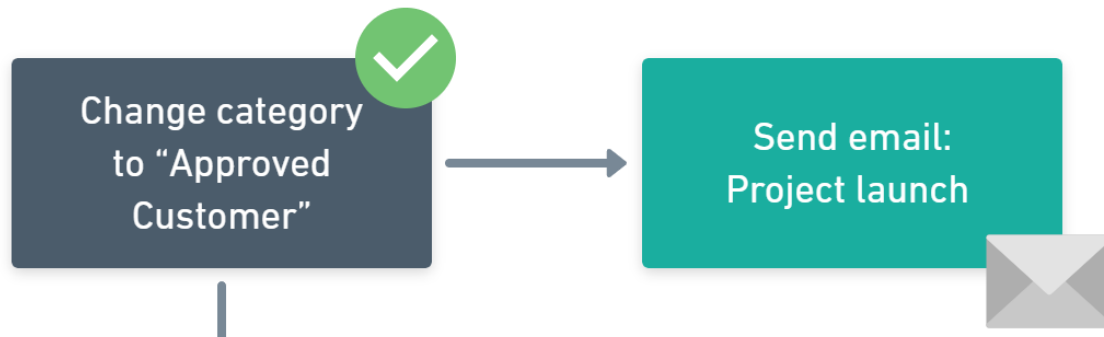
End: 1/23/2022 9:15 AM

Duration: All day 0h 15m

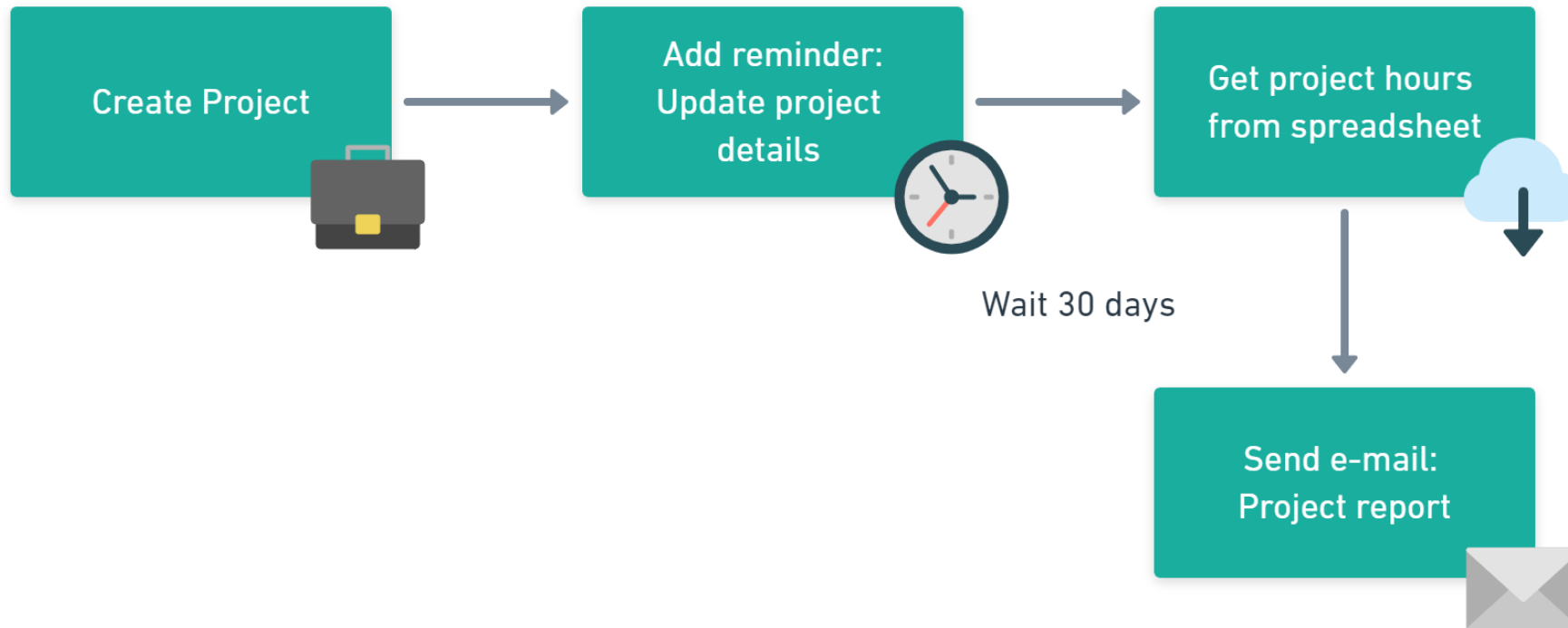
Location:

Task Save Cancel





Wait 7 days
exclude weekend+ holidays



Workflow – Change customer category

MACROS

With macros you can customize and automate actions inside SuperOffice with an easy-to-use setup wizard.



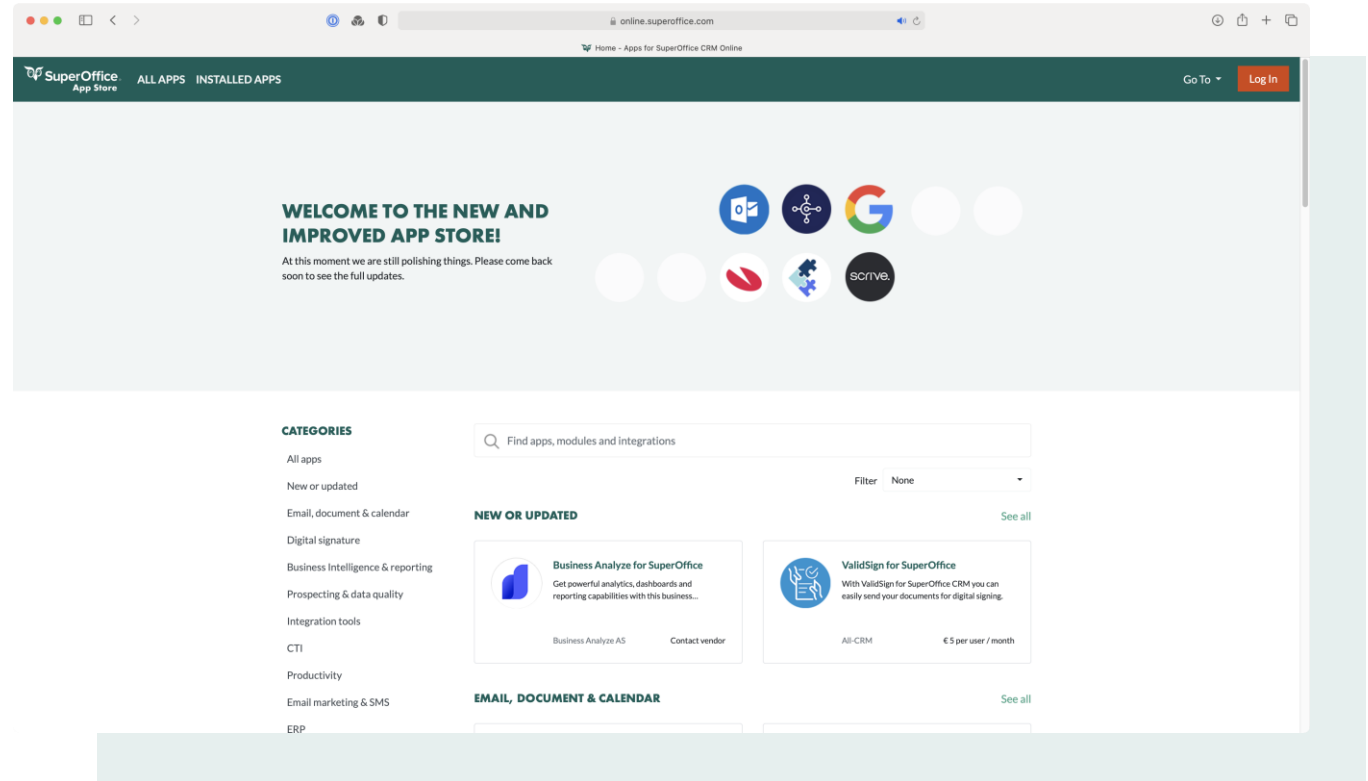
You can use macros

- as a task/function in a menu point
- when a request is escalated via the warning levels for priority
- as a planned task
- when they are activated by an e-mail filter
- when a recipient clicks a tracked link in a mailing

**Integrate and automate with other
platforms or data sources**

Scale up and customize your solution with apps

With **App Store** you can enjoy apps that will help you increase your productivity, customize your CRM solution and offer a better online experience.



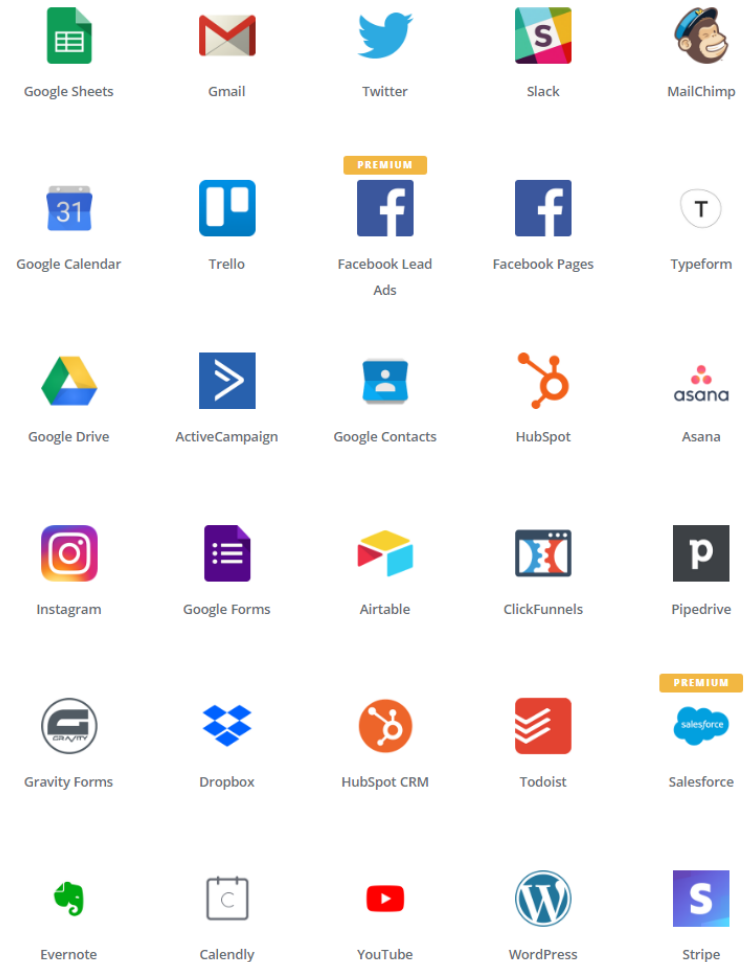


Zapier is an online **integration engine** with connections to 4000+ business applications in the cloud.

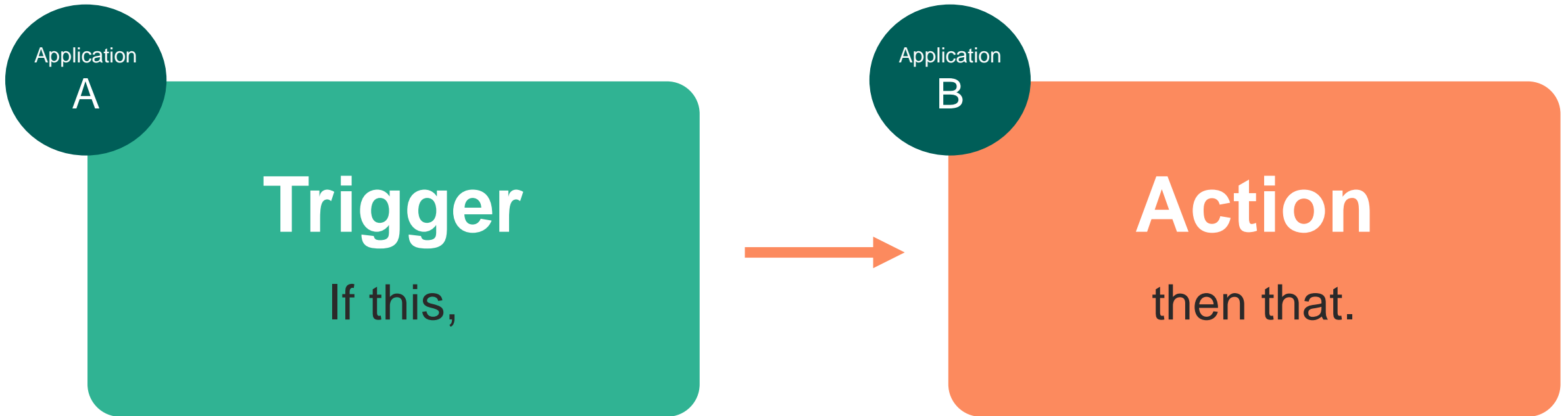
Using the Zapier service, a subscriber can connect and move data between the many business applications that are available in the Zapier directory.

Automate to save time and money

- Zapier offers **simple, effective and low-cost automations** between two or more applications
 - Automate repetitive tasks
 - Ensure data consistency
 - Improve data quality
- Ideal for **smaller scale integrations** and simpler **automations**
 - No programming involved
 - Lightweight “if this-then that” instructions

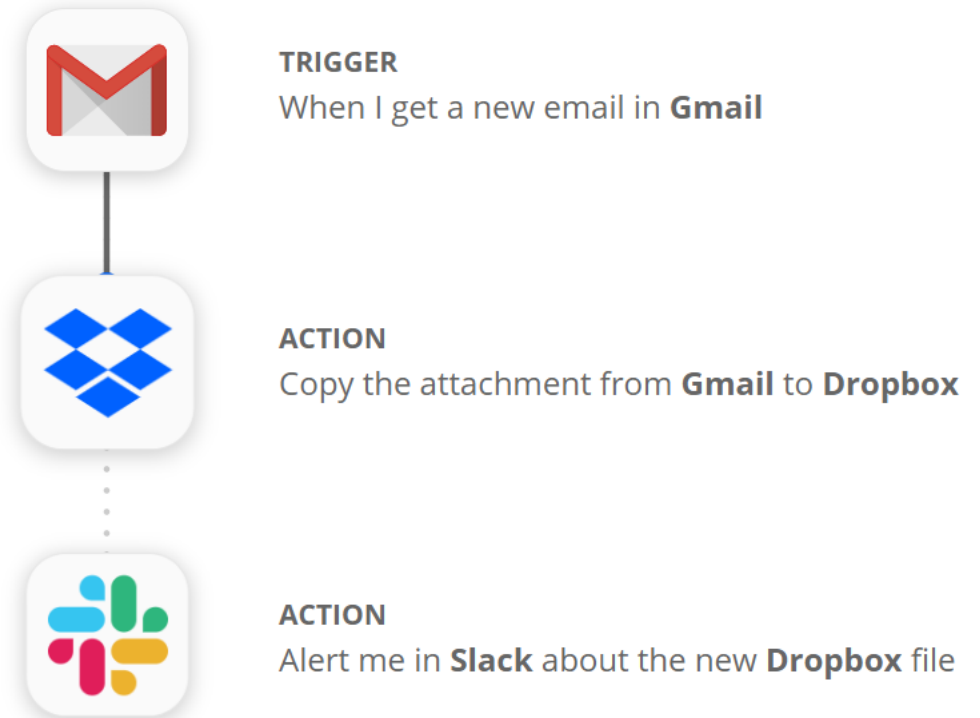


Zapier automates workflows between applications



Integrations are called “Zaps”

- A zap **moves data** between applications through a trigger and action process called **a zap**.
- Zapier subscribers are able to either **create their own zaps**, or use **pre-made ones**.
 - To create a zap, users select a trigger to set off a chosen action.
 - Pre-made zaps, called Zap templates, are pre-defined workflows between selected applications.



SuperOffice vs Zapier

Macro & CRM Script

- CRMScript is a feature that allows you to automate tasks in or modify the behaviour of SuperOffice.
- Macros are the easy-to-use version of scripts: You do not need extensive scripting or CRMScript knowledge to create macros.

Zapier

- Connect to other apps and move data, but not a 2-way sync
- Automate workflows easily

HOW TO GET STARTED

Development Tools is a site-wide license that enables you to extend, optimize, configure and automate SuperOffice CRM.

- CRMScript & Macros
- Extra tables
- Custom Screens
- Configurable screens (screen designer)

To use the **Zapier integration**, you need:
A SuperOffice CRM **Online** subscription;
A Zapier account (basic version is free)



LEARN MORE ABOUT SUPEROFFICE CRM

The screenshot shows the SuperOffice Help Center & Community website. At the top left is the SuperOffice logo and the text 'Help Center & Community'. On the top right are icons for search, user profile, and a menu. Below this is a navigation bar with tabs for 'USER & ADMIN', 'LEARNING', 'SUPPORT & FAQs', 'FORUMS', and 'PRODUCT & UPDATES'. The main header features the text 'FIND ANSWERS. GET SUPPORT. JOIN CONVERSATIONS.' and a sub-header 'A hub for users and administrators to find answers to questions, access support, learn more, and help others.' Below this is a search bar with the placeholder text 'Search helpful content for users and administrators'. The 'BROWSE HELP CENTER' section contains five boxes: 'LEARNING SUPEROFFICE' (with links for User guide, Admin guide, Best practices & tips, and Videos), 'SUPPORT & FAQs' (with links for FAQ search and Support for apps), 'PRODUCT & UPDATES' (with links for Product releases, Bugs and wishes, Pilot programs, and Announcements), 'FORUMS' (with links for Getting started with SuperOffice forums, User forums, and Administrator forums), and 'TECHNICAL' (with links for API Forums and Product Extensibility). The 'POPULAR TOPICS' section at the bottom features two boxes: 'CONNECT EMAIL & DOCUMENTS' (with the description 'Connect your emails and documents to SuperOffice CRM.') and 'IMPORT CONTACTS & PRODUCTS' (with the description 'Import customer data into SuperOffice CRM in one go.').

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Events
Help Center & Community
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Thank you