



INTEGRER ERP & CRM

Øg effektiviteten af forretningsprocesser i din organisation



DAGENS VÆRTER



Mariann Linea Antoniussen

✉ Mariann.antoniussen@superoffice.com



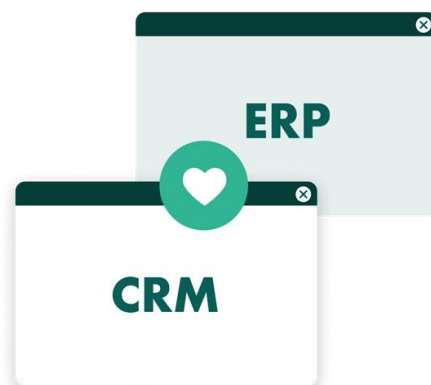
Susan Laugaard Hansen

✉ Susan.laugaardhansen@superoffice.com

AGENDA

Hvorfor integrere ERP & CRM

- Problemer ved fragmenteret data
- Hvordan supplerer ERP & CRM hinanden



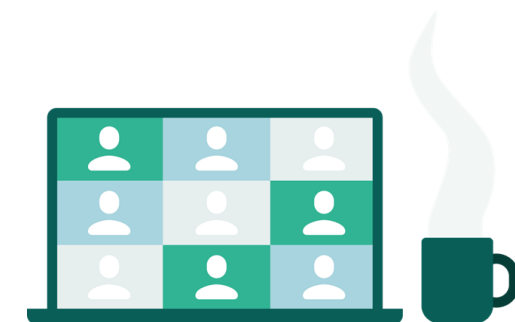
Inspiration til integrationsflow

- Hvordan kunne et integrationsflow opbygges



Live demo

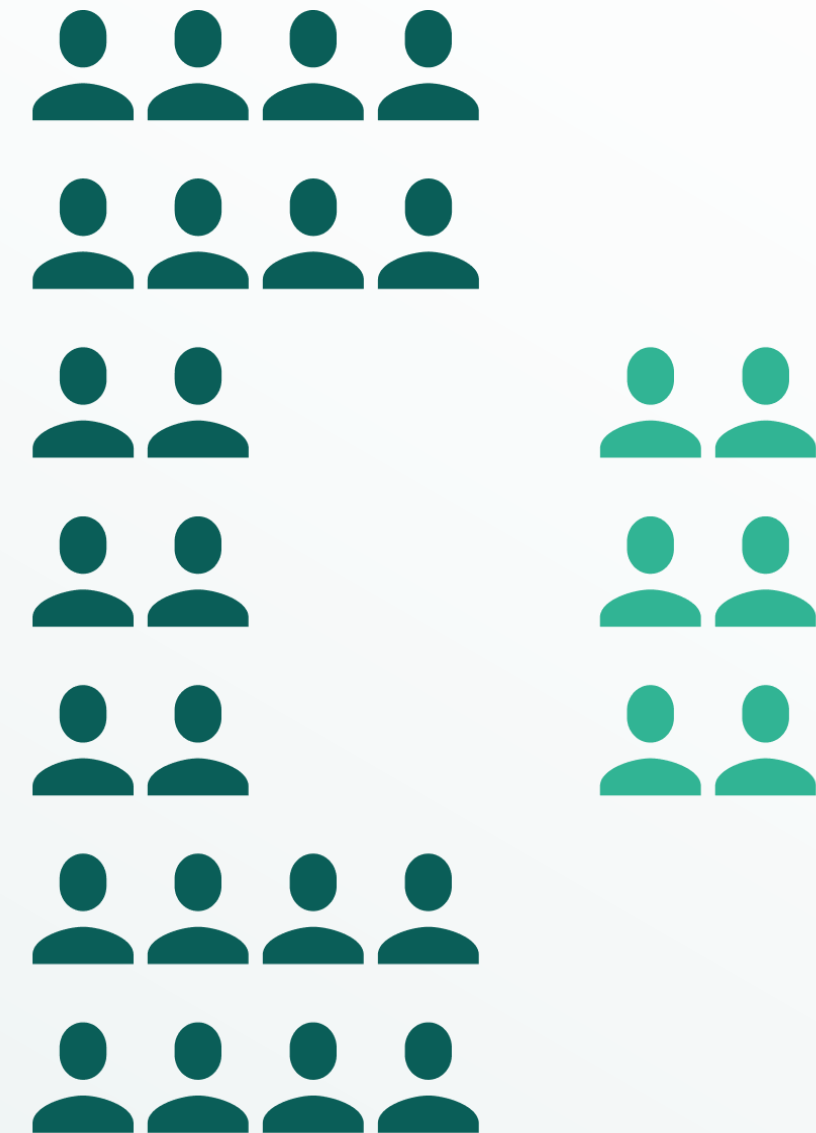
- Demo af integration imellem SuperOffice & Visma



PROBLEMER VED FRAGMENTERET DATA

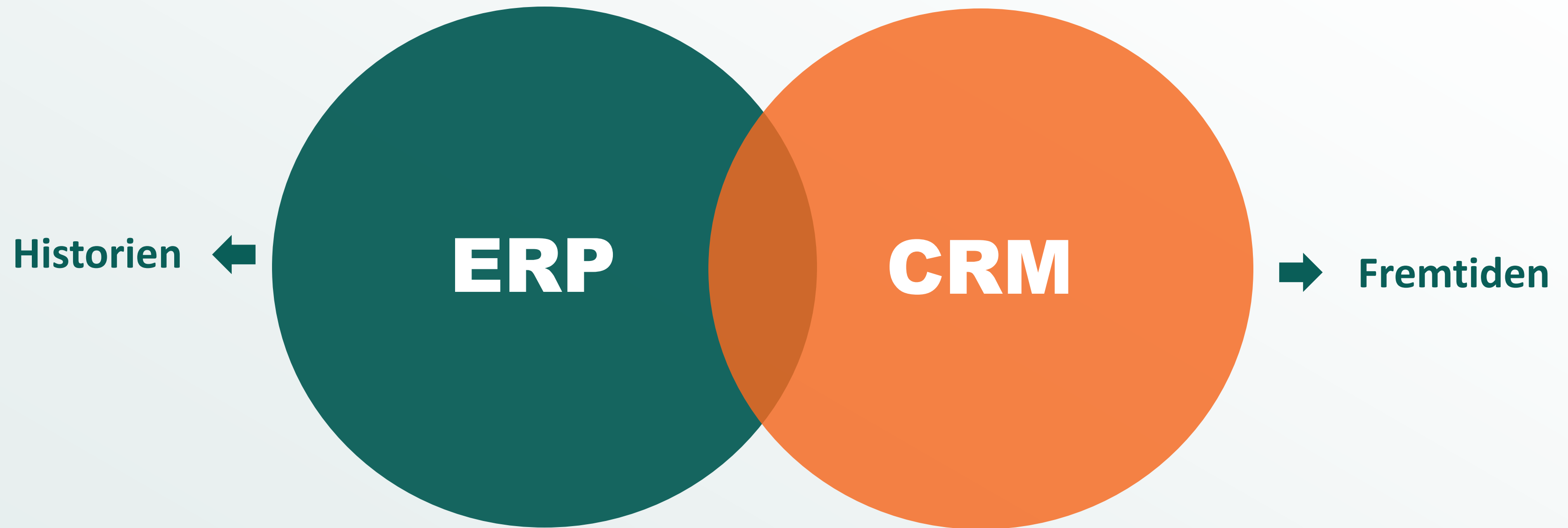
Beslutninger bygger på data – men hvad hvis dine data er spredt for alle vinde?

- For **mange systemer** – for lidt sammenhæng
- **Manglende overblik** i forhold til at udvikle strategier
- **Langsom og fragmenteret kundeservice**, der ikke lever op til kundernes forventninger.
- **Fragmenteret** datagrundlag



UDFORSK HVORDAN CRM OG ERP SUPPLERER HINANDEN

Oplev de unikke egenskaber der opstår, når CRM og ERP arbejder sammen.



HVORFOR INTEGRERE ERP & CRM?

- ✓ Intuitiv og brugervenlig grænseflade
- ✓ Tidsbesparelse
- ✓ Forenkling af arbejdsprocesser
- ✓ Samlet overblik
- ✓ Øget datakvalitet
- ✓ Hurtigere reaktionstid
- ✓ Øget produktivitet
- ✓ Bedre kundeoplevelse
- ✓ Sikre data i forhold til GDPR



OVERVEJELSER

- Søgning på ERP data
- Visning af ERP data

 Skyline Ventures AS 

Company

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Interests

Note

ERP (Visma Net)

Visma Net Key Figures

⌵ Currency:

⌵ Payment Terms:

⌵ Account Reference:

⌵ Credit Limit: 0,00

⌵ Balance: 0,00

⌵ Unreleased Balance: 0,00

⌵ Sales this period: 0,00

⌵ Sales this year: 0,00

⌵ ERP Cust. Number: 0

⌵ Linked to ERP: ☐

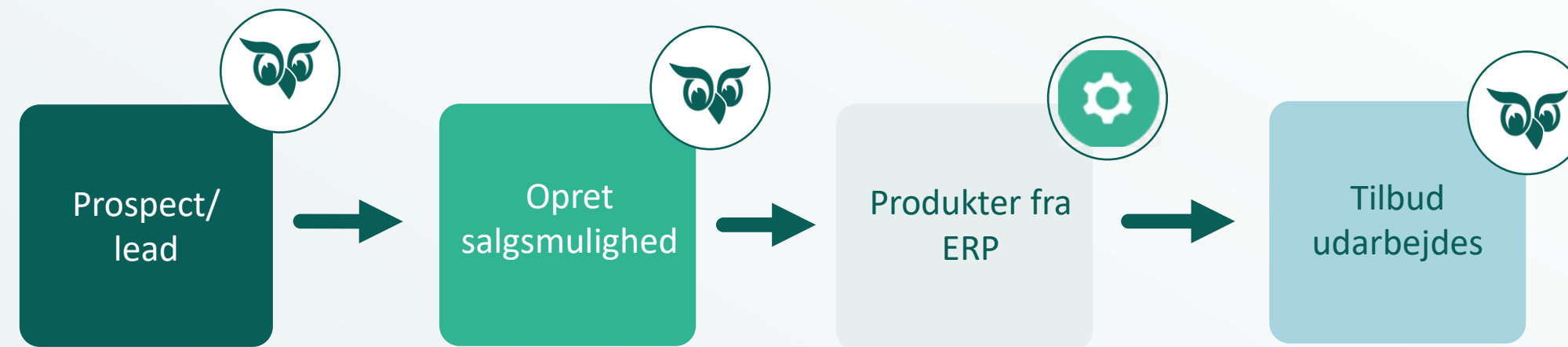
⌵ Last Sync Date:

 Show in Visma Net

☐ Stop ☐ No Mailings Undat

INTEGRATIONSFLOW

Et eksempel på flow imellem SuperOffice & ERP



COMPANY

🇳🇴 Skyline Ventures AS

P.O. Box 4321, 0105 OSLO

Category: Prospect

Our contact: Pierre van Mever

Direct phone: [+4722445566](#) 📞

Business: Banking/Finance

Web page: [www.skylineventures.no](#)

Number: 10098

Visiting: [Innovasjonsveien 10, 0167 Oslo](#)

Activities

No activities found.

Sales

No sales found.

Projects

No projects found.

Requests

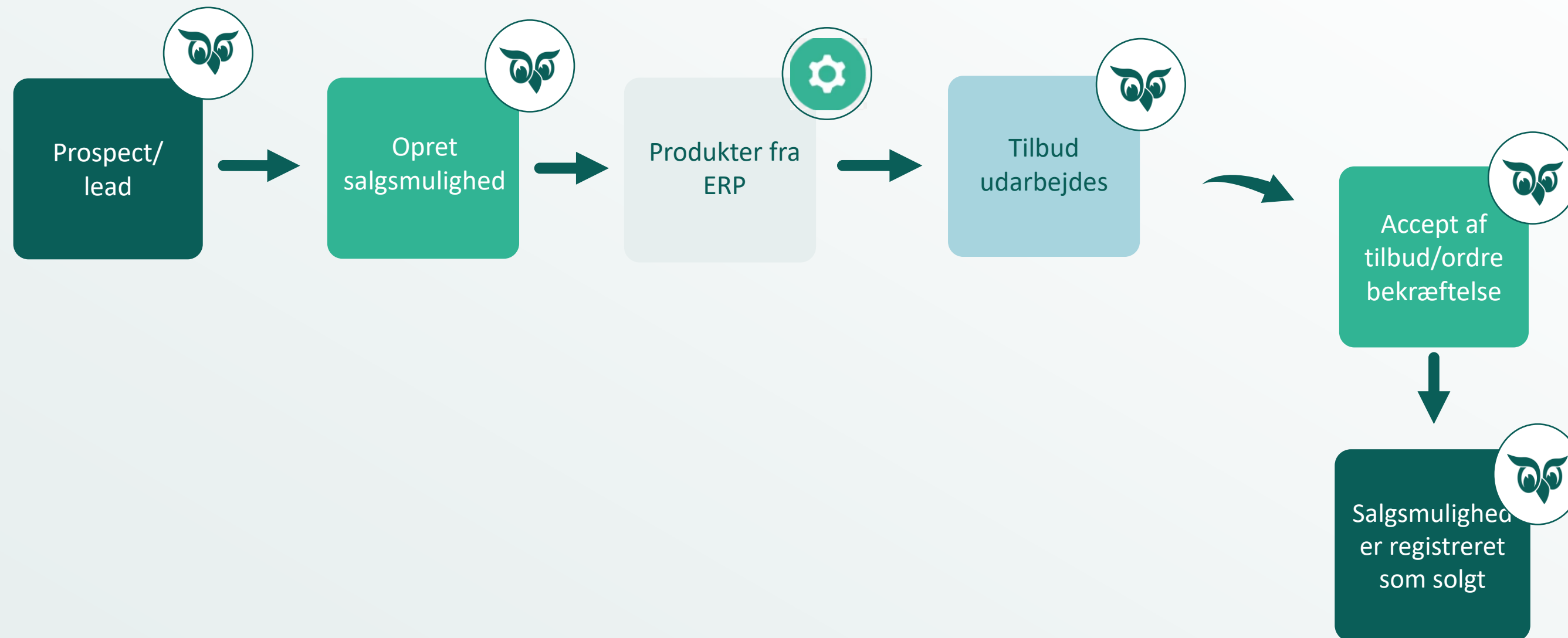
No requests found.

Chats

No chats found.

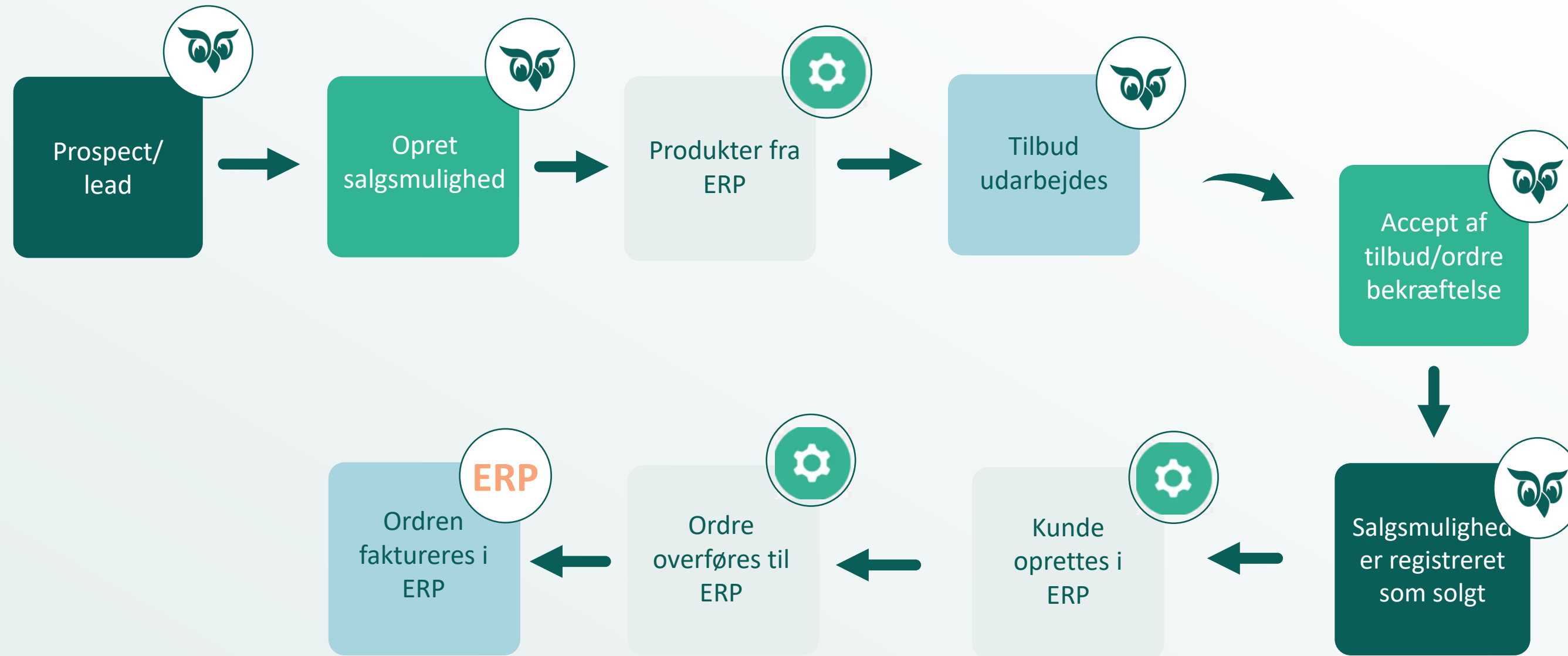
INTEGRATIONSFLOW

Et eksempel på flow imellem SuperOffice & ERP



INTEGRATIONSFLOW

Et eksempel på flow imellem SuperOffice & ERP



New

▼

☰

🔍

Freetext search

Get the mobile app

💰

✓

Apple Tech Bundle - iPhone & Vision Pro

☆

5.348

✎

⋮

Sale

Details

More

Links

Note

ERP (Visma Net)

Company:

Skyline Ventures AS

Contact:

Erik Lund

Project:

Owner:

Pierre van Mever

Date (sold):

04-01-2025

Sale type:

Sale to new customer

Stage:

Sold

100 %

Reason (sold):

☐ Completed

Updated: 04-01-2025 PM

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⏩

Sales guide

Quote

Activities

Stakeholders

Requests

doc

Click to create quote document

Version: #1 (Sold - 04-01-2025)

Number: 10043

State: Sold

\$

✓

Open

Th...	Code	Name	Quantity	Total	R...
	1002	iPhone 16 512 GB Black	1,00	1.349,00	1
	4000	Vision Pro 256 GB	1,00	3.999,00	2
			Total: 5.348,00 EUR		

Export

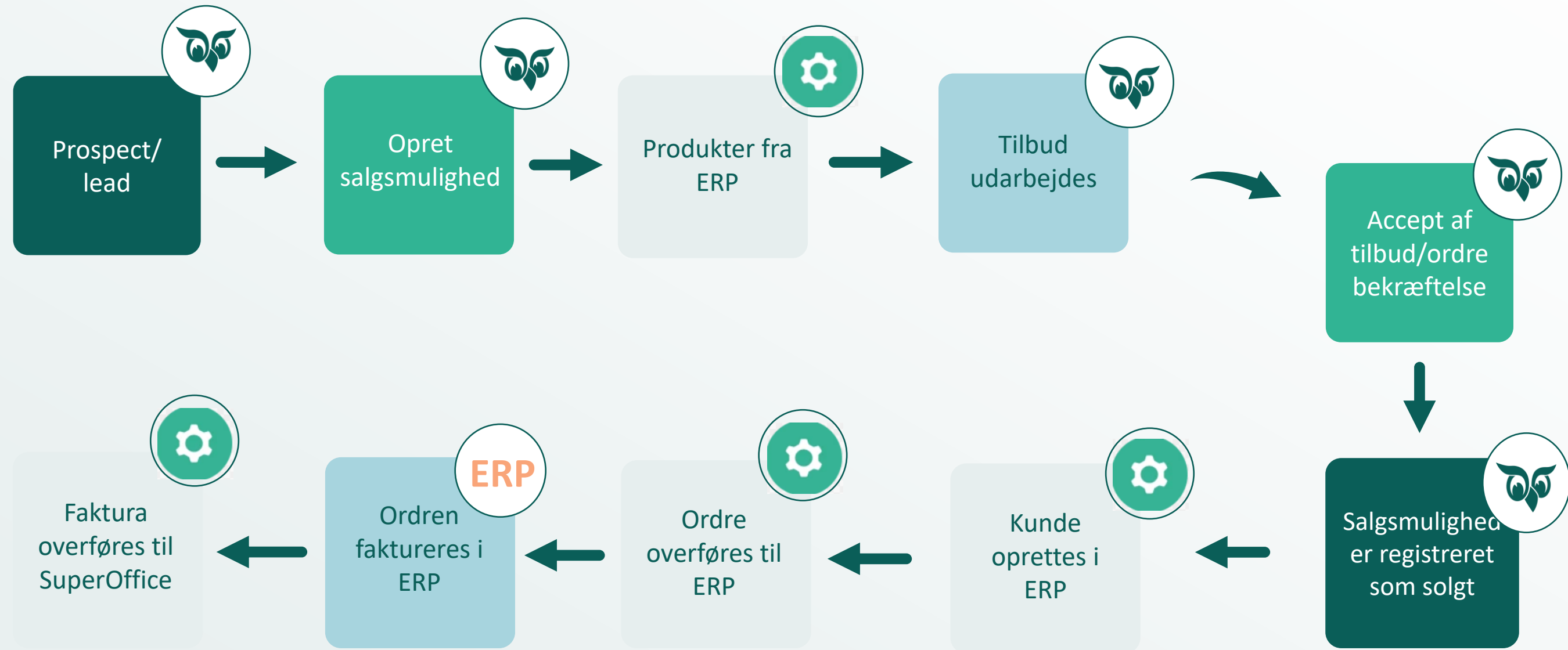
ERP connection: SuperOffice(SuperOffice Standalone)

count : 2

COMPANY	
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Activities	
04-01-2025	E-mail
04-01-2025	Order confirmation
04-01-2025	Quote - Grouped with summary
Sales	
04-01-2025	Apple Tech Bundle - iPhone & Vision Pro
Projects	
No projects found.	
Requests	
No requests found.	
Chats	
No chats found.	

INTEGRATIONSFLOW

Et eksempel på flow imellem SuperOffice & ERP





Dashboard

Company

Contact

Diary

Sale

Project

Requests

Selection

Inbox

Marketing

Tools

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Freertext search

Get the mobile app

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👤

☰

💡

Help

🗖️

 Skyline Ventures AS

★



Company

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Interests

Note

ERP (Visma Net)

Visiting: [Innovasjonsveien 10, 0167 Oslo](#)

Postal: [P.O. Box 4321, 0105 OSLO](#)

Country: [Norway](#)

Phone: [+47 22 44 55 66](#) 📄

Fax: [+47 22 44 55 20](#) 📄

Website: [www.skylineventures.no](#) 📄

E-mail: [contact@skylineventures.no](#) 📄

Our contact: **Pierre van Mever**

Category: **Prospect**

Code: **SKYLINEVE**

Number: **10098**

VAT No.: **876543210**

Business: **Banking/Finance**

Main contact: **Erik Lund**

🔗Linked to ERP: ☒

☐ Stop ☐ No Mailings

Updated: 04-01-2025 DM

⏪ ⏩

Contacts

Activities

Sales

Relations

Projects

Requests

Visma.Net Orders

Visma.Net Invoices

	Mr/Ms	First name	Last name	Title	Phone - Mobile	E-mail	⚙️
	Mr.	Erik	Lund	Managin...	+47 91 23 45 67	erik.lund@skylineve...	
	Ms.	Solveig	Nilsen	Investm...	+47 92 34 56 78	solveig.nilsen@skylin...	

➕ Add

🗑️ Delete

📄 Export

☒ Former employees count : 2

🔄

COMPANY

 Skyline Ventures AS
P.O. Box 4321, 0105 OSLO

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Activities

04-01-2025 [E-mail](#)

04-01-2025 [Order confirmation](#)

04-01-2025 [Quote - Grouped with summary](#)

Sales

04-01-2025 [Apple Tech Bundle - iPhone & Vision Pro](#)

Projects

No projects found.

Requests

No requests found.

Chats

No chats found.

SuperOffice® CRM

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+

←

→

↺

sod2.superoffice.com/Cust36627/default.aspx?contact.main.activityarchive.minicontact?contact_id=51

☆

🔔

📁

📄

🗺️

⋮

Dashboard

Company

Contact

Diary

Sale

Project

Requests

Selection

Inbox

Marketing

Tools

Skyline Ventures AS

★

✎

⋮

Company

More

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🔗Linked to ERP: ☒

☐ Stop ☐ No Mailings

Updated: 04-01-2025 DM

⏪

⏩

Contacts

Activities

Sales

Relations

Projects

Requests

Visma.Net Orders

Visma.Net Invoices

	C..	Date	Type	Text	Full name	P...	Owner	⚙️
☐	📅	31-01-2025	Follow-up	The published quote will ...	Erik Lund		PM	
☐	📄	05-01-2025	PDF document	Invoice #000016 5,348.00			PM	
☒	@	04-01-2025	E-mail	Order confirmation e-mail	Erik Lund		PM	
☒	📄	04-01-2025	Order confirmation	Apple Tech Bundle - iPho...	Erik Lund		PM	
☒	📄	04-01-2025	Quote - Grouped with summary	Apple Tech Bundle - iPho...	Erik Lund		PM	

➕ Add

🔍 Filter

⚙️ Show (5/5)

📄 Export

count : 5

🔄

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04-01-2025 Apple Tech Bundle - iPhone & Vision Pro

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Requests

No requests found.

Chats

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Q&A

Spørgsmål i forhold til dagens session?



DOWNLOAD DEN ULTIMATIVE GUIDE TIL CRM + ERP

Hvad hvis du på bare 17 minutter kunne finde nøglen til hurtigere vækst, stærkere kunderelationer og færre tabte kunder? Denne guide hjælper dig med at finde ud af, om et CRM-system er det, din forretning mangler.

Download



TILMELD DIG ALLEREDE NU!

Næste SuperOffice events er:

- **InspirationsMorgen** Online d. 10. november 2025

Link:

<https://www.superoffice.dk/events/webinar/2025/inspirationsmorgen-online-nov/>

Relationships that matter. Revenue that grows.





Tak for i dag