

SuperOffice webinar om AI

Din SuperOffice CRM har fået AI superkræfter.

På webinarret i dag får du indsigt i, hvilke AI muligheder der er i jeres SuperOffice løsning, hvor vi viser hvad der er muligt lige nu.



Praktisk



**Dagens indhold om AI
vil foregå på engelsk**

Webinaret optages

Stil spørgsmål undervejs i chat
(på dansk eller engelsk)

Dine værter



Jonas Kallan Langvad



Filip Norman



Agenda

Topics for today

1. SuperOffice Copilot in the side panel
2. SuperOffice for Outlook incl. AI assist
3. Reply assist for service tickets
4. Making mailings for marketeers
5. MCP Connect



AI help in the Side panel

- A user-friendly chat window embedded within the application for seamless interaction
- Provides immediate help (use ready-made prompts), reducing the time spent searching for information and to create text
- Use for detailed information, summaries, ordinary questions and inspiration

The screenshot displays the SuperOffice CRM interface. On the left is a dark green sidebar with navigation icons for Dashboard, Company, Contact, Diary, Sale, Project, Requests, Selection, Inbox, Chat, Marketing, and Tools. The main area shows a contact profile for Mr. John Rowling Jr. (Liberty Communication, HQ) with tabs for Contact, More, Interests, Note, and Sverre. The profile details include: Title: Account Manager; E-mail: jrowling@liberty.com; Mobile: +47 934660999; Direct phone: +47 23356030; Preferred language: English; Category: VIP customer; Our contact: Eric Eiden; Business: IT and Software; Position: Sales; Service priority: Medium. Below the profile is a section for 'Former employee' with an update date of 20/12/2024 and a link for 'FilipN Legal basis Consent'. The bottom section is a table of activities with columns for Date, Type, Text, and Who's up. The table contains several rows of business meeting records. On the right, a 'SUPEROFFICE ASSISTANT' chat window is open, displaying a prompt: 'Get inspired using AI. Use the predefined questions below or chat with me.' and buttons for 'Company details', 'Contact details', and 'Write a post'. At the bottom of the chat window, there is a text input field and a 'Send' button.

Side panel – demo

The screenshot displays the SuperOffice CRM interface. On the left is a dark green sidebar with navigation icons and labels: Dashboard, Company (selected), Contact, Diary, Sale, Project, Requests, Selection, Inbox, Chat, Marketing, and Tools. The main content area is divided into three sections. The top section shows the profile for 'Liberty Communication' (HQ), including address, phone, website, and contact details for Eric Eidem. The middle section is a 'Contacts' table with columns for Title, First name, Last name, E-mail, and Phone - Mobile. The bottom section shows a list of activities, sales, and projects. A right-hand panel displays a detailed view of a contact, John Rowling Jr., with his title, category, email, and phone numbers, along with a list of activities and sales events.

Liberty Communication HQ

Company More Interests Note

Visiting: Drammensveien 1, 0186 OSLO
Postal: Postboks 1234 Vika, 0605 OSLO
Country: Norway
Phone: +47 11 22 33 44
Website: www.liberty.com
E-mail: hello@liberty.com

Our contact: **Eric Eidem**
Category: **VIP customer**
Business: IT and Software
Code: LIBERTYCO
Number: 10013
Main contact: John Rowling Jr.

Stop No Mailings Updated: 19/12/2024 FilipN

Contacts Sales Projects Activities Requests Relations

Title	First name	Last name	E-mail	Phone - Mobile
Account Manager	John	Rowling Jr.	johnjr@liberty.com	+47 934660999
CEO	Jill	Mcmanaman	jill@liberty.com	+47 934660997
CFO	Bente	Jakobsen	Bente.Iren.Jakobsen@liberty.com	+47 934660996
Account Manager	Erik	Eriksen	erik.eriksen@liberty.com	+47 934660998
Team lead	John	Irwing	john.irwing@liberty.com	+47 934660995

Former employees count : 5

CONTACT

John Rowling Jr.
Liberty Communication, HQ

Title: Account Manager
Category: VIP customer
E-mail: johnjr@liberty.com
Mobile phone: +47934660999
Direct phone: +4723356030

Activities

- 22/12/2023 Business meeting
- 22/12/2023 Business meeting
- 22/12/2023 Business meeting
- 22/12/2023 Business meeting
- 20/12/2023 Business meeting

Sales

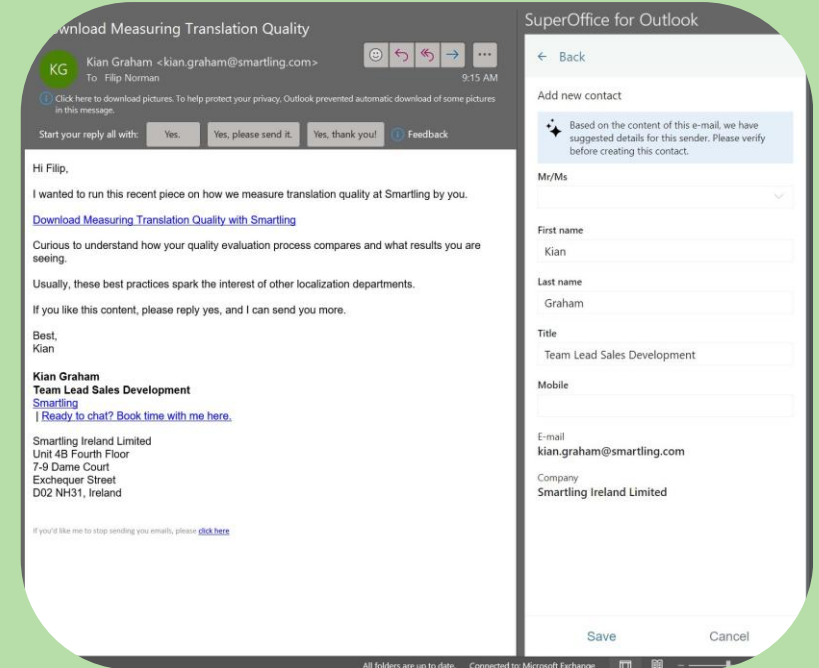
- 07/06/2024 Phones - Price for their spring campaign
- 25/02/2024 Award trips to the Maldives
- 25/01/2024 Gadgets for the sales team

Projects

- 10065 Team dinner 04.03.2022
- 10063 Webinar - Promo items trends - October 2022
- 10016 The Expander World 2017

SuperOffice for Outlook and AI

- Use AI to extract information
- AI find the information
- AI puts in the information like:
 - First name
 - Last name
 - Title
 - E-mail
 - Company



SuperOffice for Outlook – demo

The screenshot displays the Microsoft Outlook interface with the SuperOffice add-in. The ribbon includes the following SuperOffice-related buttons: **Share to Teams**, **Quick Steps**, **Move**, **Tags**, **Groups**, **Search People**, **Address Book**, **Filter Email**, **Read Aloud**, **Translate**, **All Apps**, **Reply with Scheduling Poll**, **Suspicious email?**, **Viva Insights**, and **SuperOffice for Outlook**. The main pane shows an email thread with the following content:

Call This Week
Zack Adair <zack.adair@productplan.com>
To: Filip Norman
Mon 2026-06-01 5:35 PM

You replied to this message on 2026-06-02 7:59 AM.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hi Filip,

I hope you had a good weekend. Do you have any topics that you would like to discuss Wednesday during our scheduled monthly sync?

Thank you

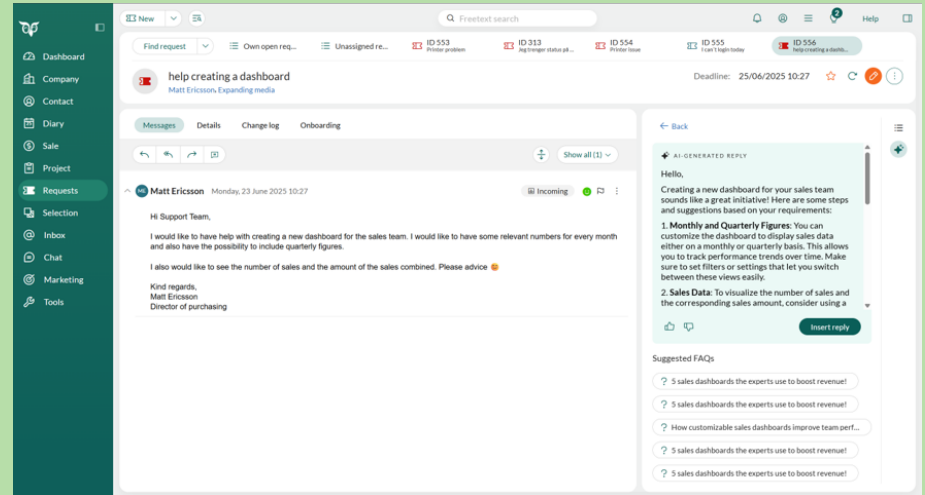
Zack Adair
Vice President | Customer Operations
ProductPlan

Email: zack.adair@productplan.com
productplan.com

Right-click on top and hold here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet.

Reply assist

- Creates replies to requests based on data stored in SuperOffice, like other requests, reply templates, FAQs, documents and web pages
- This improves response times
- Requests are handled faster and with more accuracy, which leads to higher customer satisfaction



Reply assist – demo

The screenshot displays the SuperOffice web interface. On the left is a dark green sidebar with navigation options: Dashboard, Company, Contact, Diary, Sale, Project, Requests (highlighted), Selection, Inbox, Chat, and Marketing. The main content area shows a request titled "iPhone 17 information wanted" from Filip Norman, SuperOffice Product and Engineering. The request details include a message from Filip Norman dated Monday, February 23, 2026, at 14:25. The message text is: "Hi Apple, I wonder which colors you have available for iPhone 17? Could you also provide some common specifications for the phone?". Below the message is the sender's contact information: Filip Norman, Product Manager, SuperOffice, with mobile number +46 709 633 860, address Sveavägen 159 | 113 46 Stockholm, Sweden, and website www.superoffice.com. Social media icons for LinkedIn, Instagram, Facebook, and YouTube are also present. At the bottom of the message is a promotional banner for SuperOffice featuring an owl and the text "Big enough to change your business, local enough to know it." On the right side of the interface, a "REQUEST PROPERTIES" panel is visible, showing fields for Request type (Request), Status (Open), Owner (Stefan Rydén), Category (Administration), Priority (Medel), Access level (External), and Tags (Add tag).

How to setup?

Where to start

- Get an understanding of your data
- Add sources with correct information
- Add instructions to get better answers
- Need to iterate to fine tune

The screenshot displays the 'Service Copilot' interface. At the top, there are tabs for 'Service', 'System prompt', and 'Service Copilot'. Below these, there are two main sections: 'Sources' and 'Settings'.

Sources: This section provides an overview of sources the Copilot can access and train on. It features a status bar at the top indicating 'Indexing completed' with a checkmark and a blue 'Index now' button. Below this, there is a list of sources, each with a document icon and a title:

- Produktblad
- Products in general (with a sub-note: 'Use this with care')
- Selections from 2025
- iPhone
- Homepage information (highlighted in a teal bar with an edit icon)
- SuperOffice kunder page

At the bottom of the sources list, there is a blue link that says 'Add source'.

Settings: This section is titled 'Source / Homepage information' and contains several input fields and options:

- Source name:** A text input field containing 'Homepage information'.
- Description:** A larger text input field.
- Starting URL:** A text input field containing 'https://www.apple.com/se/iphone-17-pro/'.
- Mode selection:** Two radio buttons: 'Crawler mode' (which is selected) and 'Single page only'.
- Start from the URL and continue to follow links on the site.** A descriptive text line.
- Advanced options:** A dropdown menu.

Do you have AI on your agenda?

Interested in trying out reply assist before it is general available?

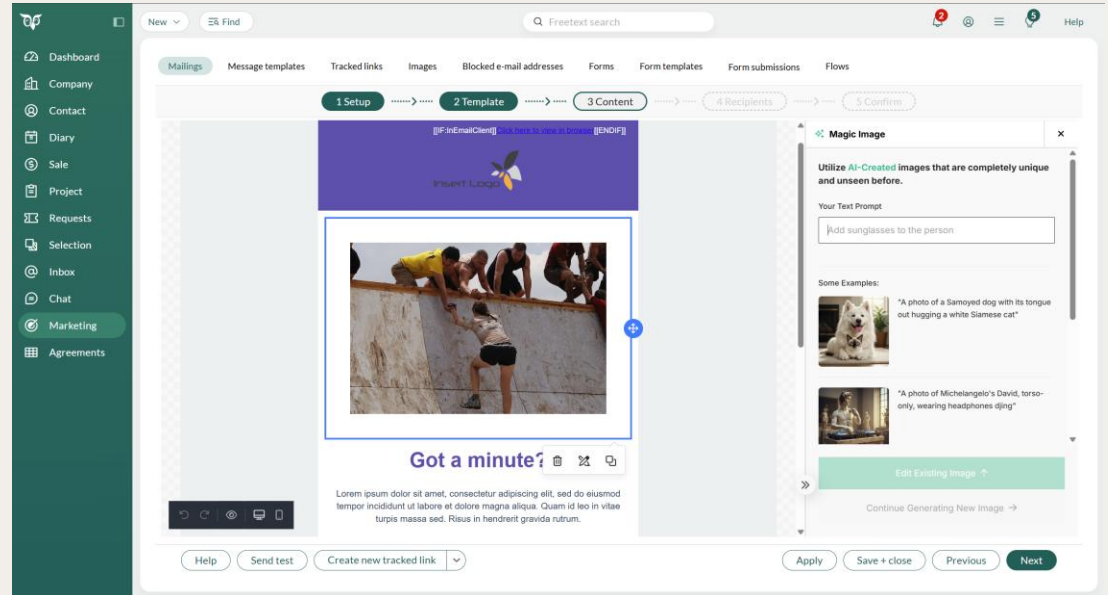
- Customers in pilot
- Reach out to your contact at SuperOffice to start with service and or 'Reply assist'
- Plan to go live after the summer



How to work with content

Marketing

- Help with content in a newsletter
- Describe the image that you want
- Answer the questions to refine
- Use or iterate



Marketing content – demo

The screenshot displays the SuperOffice Marketing Content editor. On the left is a dark green sidebar with navigation options: Dashboard, Company, Contact, Diary, Sale, Project, Requests, Selection, Inbox, Chat, Marketing (highlighted), and Agreements. The main workspace is white and features a top navigation bar with 'New' and 'Find' buttons, a search bar, and a 'Help' button. Below this is a breadcrumb trail: 'Mailings' > 'Message templates' > 'Tracked links' > 'Images' > 'Blocked e-mail addresses' > 'Forms' > 'Form templates' > 'Form submissions' > 'Flows'. A progress indicator shows five steps: '1 Setup', '2 Template', '3 Content' (active), '4 Recipients', and '5 Confirm'. The central editor area contains a purple header with a placeholder for a link, an 'insert Logo' button, a large image of cherry blossoms, a heading 'Need a new view?', a paragraph of placeholder text, a 'Help us with:' section with three lines of placeholder text, and a 'Take a survey' button. To the right is a vertical toolbar with icons for 'Content', 'Blocks', 'Body', 'Images', and 'Audit'. The 'Content' block is expanded, showing options for COLUMNS, BUTTON, DIVIDER, HEADING, PARAGRAPH, IMAGE, VIDEO, SOCIAL, MENU, HTML, and TABLE. At the bottom of the editor are buttons for 'Help', 'Send test', 'Create new tracked link', 'Apply', 'Save + close', 'Previous', and 'Next'.

MCP server

- Model context protocol
- Allow other AI systems access SuperOffice CRM in a controlled way
- Connect your AI frontend like Claude or Microsoft Copilot to your CRM data
- Build custom personal AI Agents of your choice based on SuperOffice CRM data

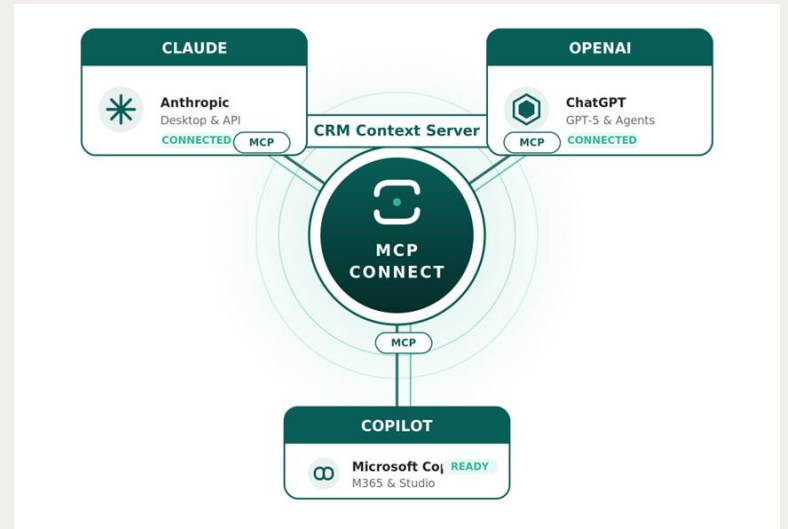


MCP server information

Close to release the first beta version of MCP

There will be only read-only capabilities

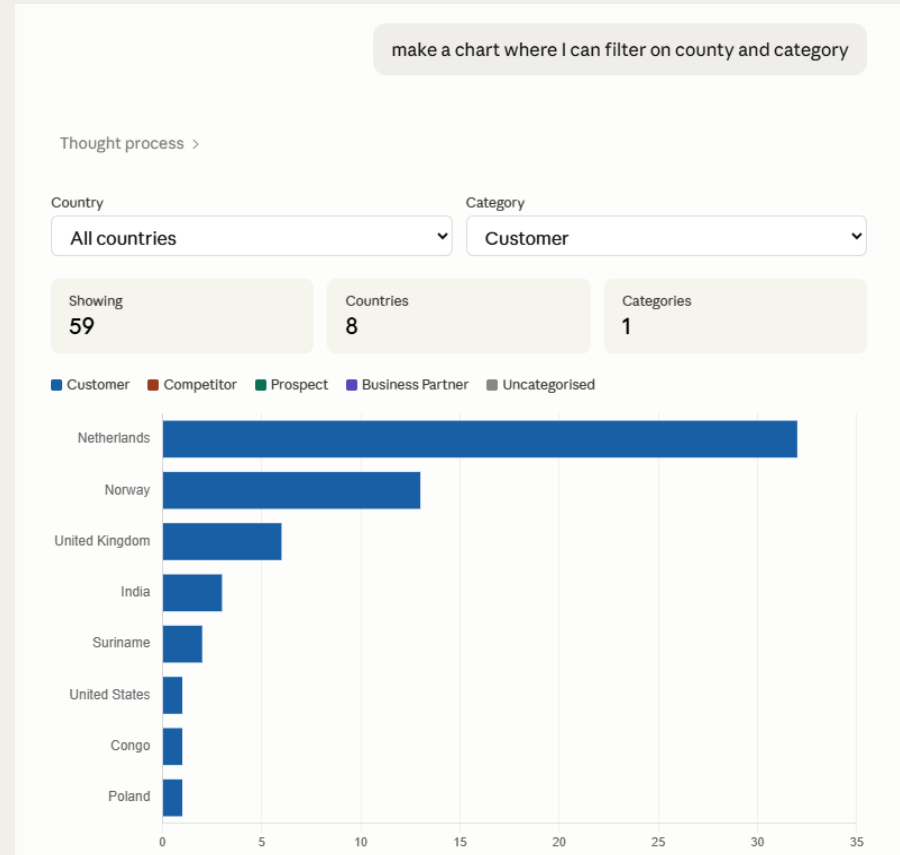
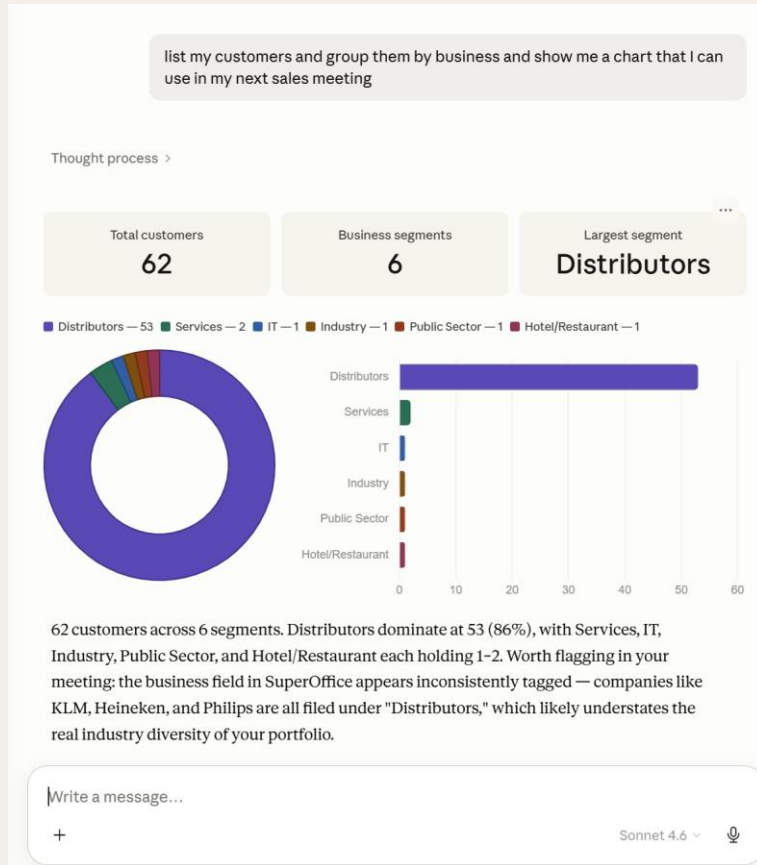
You need to have a user license to SuperOffice to authenticate and login



MCP – Microsoft Copilot example

The screenshot shows the Microsoft Copilot MCP Connect SuperOffice interface. On the left is a navigation sidebar with options: New chat, Search, Library, Agents (Researcher, Analyst, Ask SuperOffice CRM, MCP Connect SuperOffice, Growthie, New agent, More agents), Chats (Create a chart for my upcomin..., Create a list of my sales that I c..., whoaml, list my sales, European B2B CRM Market AI ..., list my companies, Zero Data Retention Policy Inq..., whoaml, youaml), and a user profile for Filip Norman, M365 Copilot (Premium). The main area displays the MCP Connect SuperOffice logo and the text "Created by Your developer name". Below this is a chat input box containing the text "List my upcoming sales and group them by sales type", with a plus sign on the left, a microphone icon, and a blue send button on the right.

MCP – Claude example



MCP tools

Available tools in the AI services

Server info

Information about you

Search and get appointments

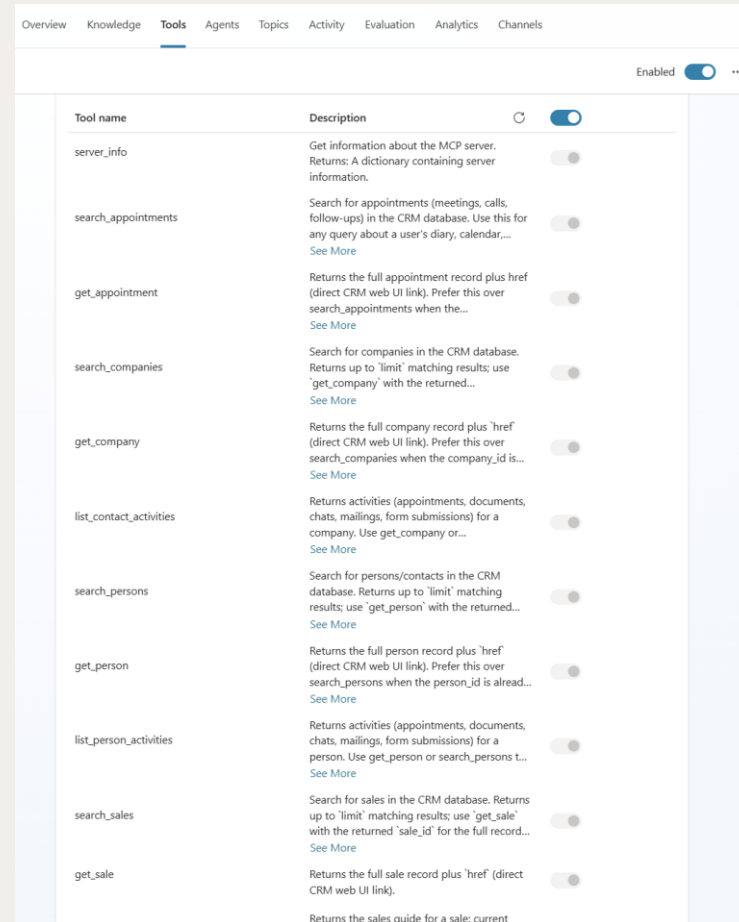
Search and get companies

Search and get persons

Search and get sales

Search and get projects

Requests will be added next week



The screenshot shows a web interface for managing MCP tools. At the top, there are navigation tabs: Overview, Knowledge, Tools (selected), Agents, Topics, Activity, Evaluation, Analytics, and Channels. Below the tabs, there is a toggle switch labeled 'Enabled' which is currently turned on. The main content is a table with two columns: 'Tool name' and 'Description'. Each row in the table also has a refresh icon and a toggle switch. The tools listed are: server_info, search_appointments, get_appointment, search_companies, get_company, list_contact_activities, search_persons, get_person, list_person_activities, search_sales, and get_sale.

Tool name	Description	Refresh	Enabled
server_info	Get information about the MCP server. Returns: A dictionary containing server information.	🔄	<input checked="" type="checkbox"/>
search_appointments	Search for appointments (meetings, calls, follow-ups) in the CRM database. Use this for any query about a user's diary, calendar,...	🔄	<input type="checkbox"/>
get_appointment	Returns the full appointment record plus href (direct CRM web UI link). Prefer this over search_appointments when the...	🔄	<input type="checkbox"/>
search_companies	Search for companies in the CRM database. Returns up to 'limit' matching results; use 'get_company' with the returned...	🔄	<input type="checkbox"/>
get_company	Returns the full company record plus href (direct CRM web UI link). Prefer this over search_companies when the company_id is...	🔄	<input type="checkbox"/>
list_contact_activities	Returns activities (appointments, documents, chats, mailings, form submissions) for a company. Use get_company or...	🔄	<input type="checkbox"/>
search_persons	Search for persons/contacts in the CRM database. Returns up to 'limit' matching results; use 'get_person' with the returned...	🔄	<input type="checkbox"/>
get_person	Returns the full person record plus href (direct CRM web UI link). Prefer this over search_persons when the person_id is ahead...	🔄	<input type="checkbox"/>
list_person_activities	Returns activities (appointments, documents, chats, mailings, form submissions) for a person. Use get_person or search_persons t...	🔄	<input type="checkbox"/>
search_sales	Search for sales in the CRM database. Returns up to 'limit' matching results; use 'get_sale' with the returned 'sale_id' for the full record...	🔄	<input type="checkbox"/>
get_sale	Returns the full sale record plus href (direct CRM web UI link).	🔄	<input type="checkbox"/>



One more thing...

Relationships that matter. Revenue that grows.

Mobile CRM and AI

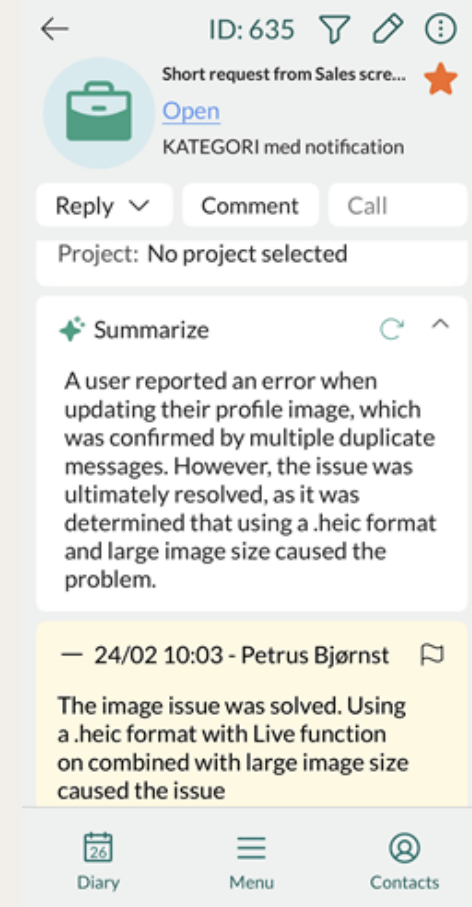
Summary of a request

On your way to a customer meeting

You see an open request

Click generate summary

The summary gets you up to speed and prepares you for the meeting



Kommende arrangementer

[SuperOffice.dk/events](https://superoffice.dk/events)

SuperOffice CHANGE

Insights *for* impact

Den 1. oktober i København





Tak for i dag.