

# **SUSTAINABLE CUSTOMIZATIONS**

**Adapt SuperOffice to your needs**



# Today's host:



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# Agenda

## Introduction

Why use customizations in SuperOffice?

## Focus areas

Different types of customizations

Integrate SuperOffice with other platforms or data sources

## The road ahead

How to get started

# WHY USE CUSTOMIZATIONS IN SUPEROFFICE?

# Benefits of customizing

- Increased usage
- Increased effectiveness
- Better targeting
- Accurate forecasting



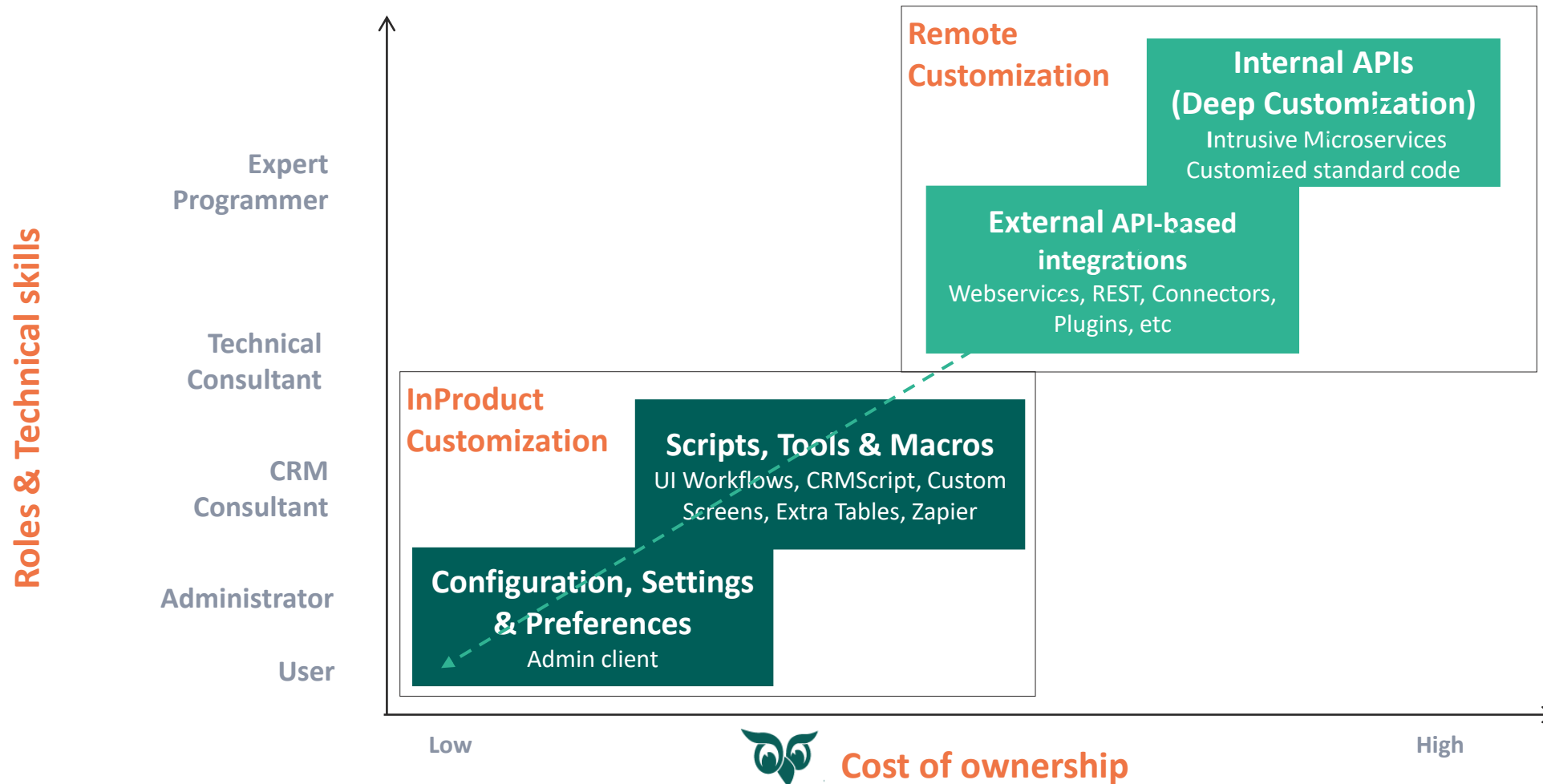
# WHAT DOES SUSTAINABLE CUSTOMIZATIONS MEAN?

## Sustainable

/sə'steɪnəb(ə)l/

Able to be maintained at a certain rate or level.

# Customization Tools



# USER DEFINED FIELDS

Add specific information with extra fields in SuperOffice:

- Text fields
- Dates
- Checkboxes
- Decimals
- Or a list of preset values

The screenshot displays the SuperOffice CRM interface for a company profile. The header shows 'SuperOffice' with '+ New' and 'Find' options. The main content area is titled 'Liberty Communications' and includes a navigation menu with 'Company', 'More', 'Interests', 'Note', 'Agreement', and 'Service'. The profile details are organized into two columns:

Subscription Exp.	3/25/2022	Our contact:	Abigail Hart
Number of Employees	65	Our service contact:	
Postal:	87 Pownall Sq, CB22 3BB Sawston	Category:	Customer
Country:	United Kingdom	Main contact:	David Turner
Phone:	+44 1709-854691	Average NPS Score	72
Website:	http://www.libertycommunications.com	Last service control	3/16/2021
E-mail:	info@libertycommunications.com	Onboarded	<input checked="" type="checkbox"/>

At the bottom of the profile, there are checkboxes for 'Stop' and 'No Mailings', a date '11/9/2021 Anna', and buttons for 'Task' and 'Edit'.

\*User defined fields = Extra fields in SuperOffice Service



# LISTS IN SUPEROFFICE CRM

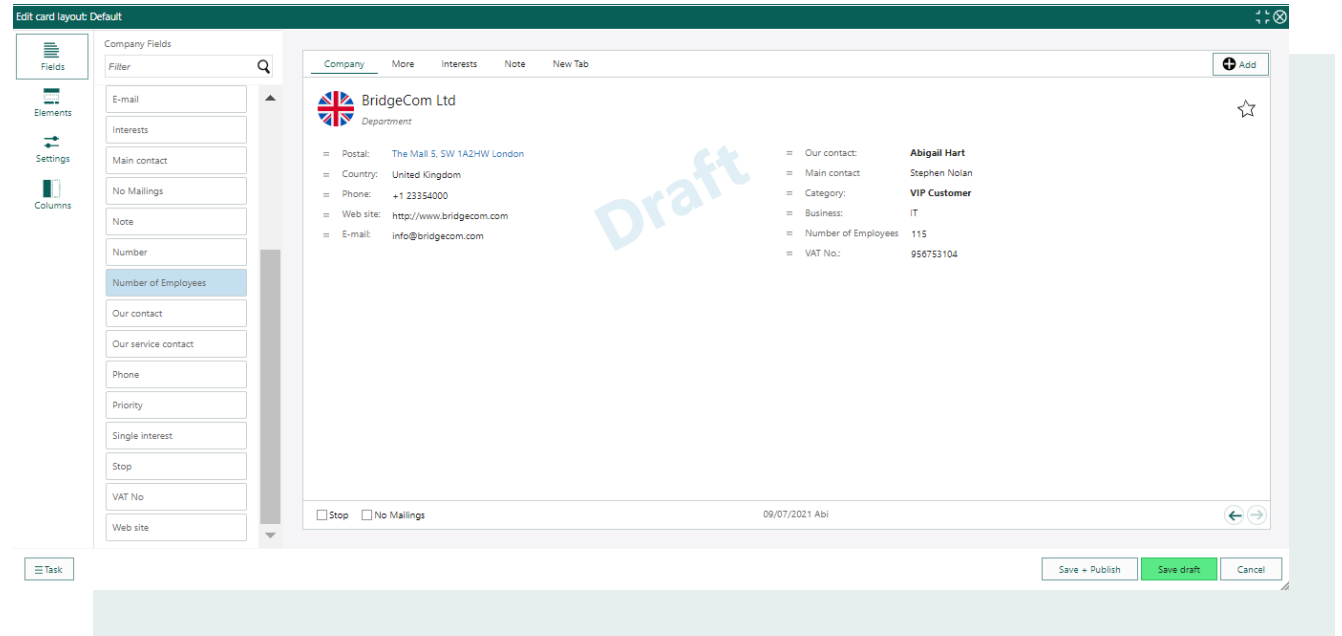
Tailor lists in the system to reflect your business processes and needs:

- Category
- Business
- Company and contact interests
- Document templates

The screenshot displays the SuperOffice CRM interface for a company profile. The header includes the SuperOffice logo, a '+ New' button, and a search icon with the text 'Find'. Below the header, there are navigation tabs: 'Company', 'More', 'Interests', 'Note', 'Agreement', and 'Service'. The main content area shows the company name 'Liberty Communications' with a UK flag icon and the word 'Department' below it. To the right of the company name is a 'Link to LinkedIn profi...' link and a star icon. The profile details are organized into two columns. The left column includes: 'Subscription Exp.' with the date '3/25/2022' and a calendar icon; 'Number of Employees' with the value '65'; 'Postal:' with the address '87 Pownall Sq, CB22 3BB Sawston'; 'Country:' with 'United Kingdom' and a dropdown arrow; 'Phone:' with '+44 1709-854691'; 'Website:' with 'http://www.libertycommunications.com'; and 'E-mail:' with 'info@libertycommunications.com'. The right column includes: 'Our contact:' with 'Abigail Hart' and a dropdown arrow; 'Our service contact' with a dropdown arrow; 'Category:' with 'Customer' and a dropdown arrow; 'Main contact:' with '(No Selection)'; 'Average NPS Score'; 'Last service control' with 'A Customer'; and 'Onboarded' with a list of options: 'B customer', 'Business Partner', 'C Customer', 'Competitor', 'Internal contact', 'Lost customer', 'Prospect', 'Supplier', and 'VIP Customer'. At the bottom of the profile, there are checkboxes for 'Stop' and 'No Mailings', and a date '11/9/2021 Anna'. The bottom navigation bar includes tabs for 'Relations', 'Contacts', 'Projects', 'Activities', 'Sales', and 'Requests'.

# Design the layout to fit your information needs

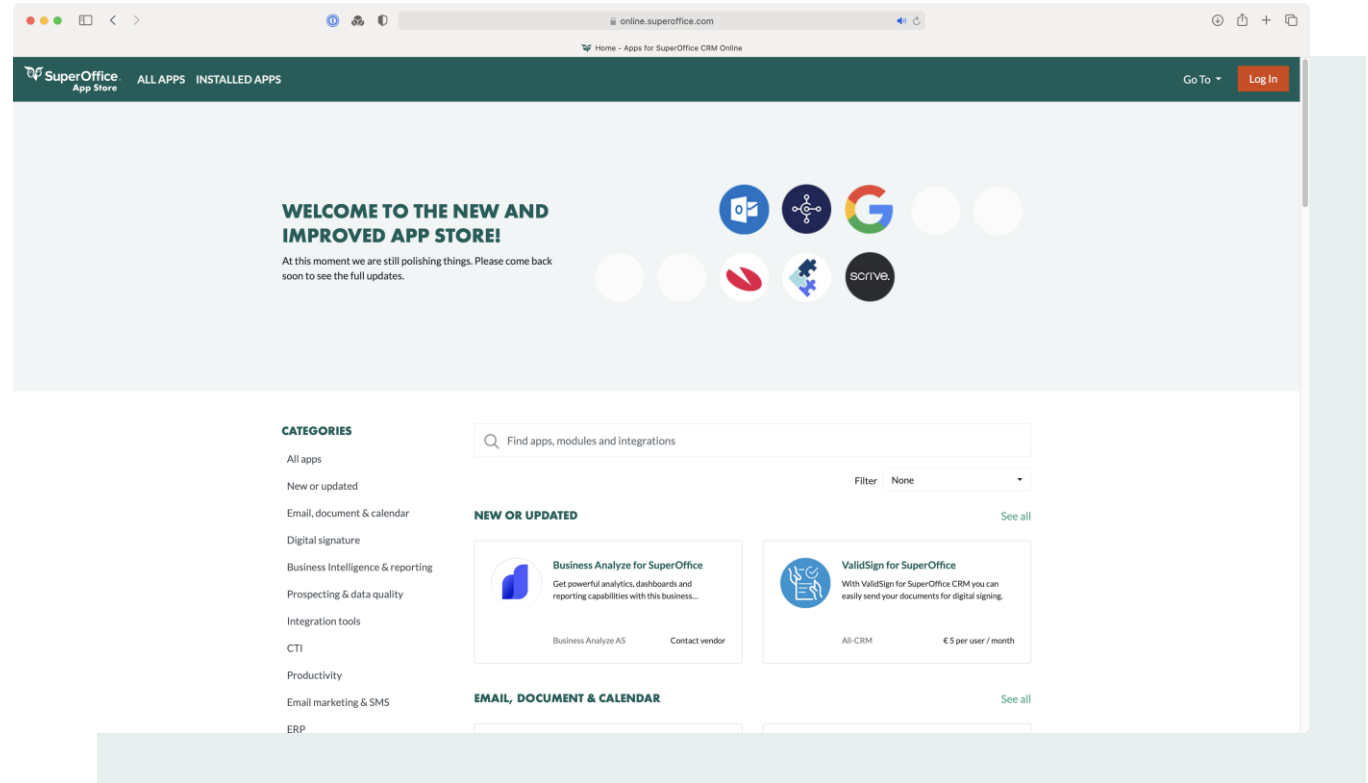
- More options to configure the solution to fit your specific needs
- Hide fields never in use, make important custom fields easy to access
- Use different screen layouts for different user groups
- Help users stay more focused with less information noise



# **Integrate SuperOffice 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.



# Reduce manual data entry with Databridge

- **Exchange data** between SuperOffice CRM and your other cloud-based applications
- Fully cloud-based, no local installation.
- Scheduled, manual, or triggered import and export.
- Support for online storage services like Dropbox, Google Drive, Microsoft One-Drive, and (S)FTP

The screenshot displays the Databridge for SuperOffice web interface. At the top, there is a navigation bar with the logo 'DATABRIDGE for SuperOffice.' and links for 'PROFILES', 'ACCOUNT', 'SUBSCRIPTION', and 'LOGOUT'. Below the navigation bar, the main content area is titled 'PROFILE OVERVIEW'. A sub-header reads: 'In this overview you see all profiles that you have created. A profile is a description of an import or export job. Based on a profile new jobs are created. In this overview you can manage your profiles, see the scheduled and past jobs for each profile and disable or delete profiles.' A 'Sort by' dropdown menu is set to 'Date: oldest first'. There are two profile cards visible:

- SAP COMPLETE->SUPEROFFICE**: Includes buttons for 'ENABLED', 'JOBS', and 'MANAGE PROFILE'. Configuration details: Input: Spreadsheet File (.xlsx, .xls, .ods); Destination: SuperOffice CRM Online; Storage location: Dropbox; File name: SAP - Customer Info.xlsx; Total runs: 1.
- SUPEROFFICE->NAVISION**: Includes buttons for 'ENABLED', 'JOBS', and 'MANAGE PROFILE'. Configuration details: Input: SuperOffice CRM Online; Destination: Spreadsheet File (.xlsx, .xls, .ods); Storage location: Dropbox; Total runs: 1.

At the bottom of the interface, there are three buttons: 'MANAGE', 'CREATE NEW PROFILE', and 'IMPORT PROFILE'.

# HOW TO GET STARTED

Customize SuperOffice to fit your business model and needs through options available in the **Settings and maintenance** module.

- User-defined fields
- Lists

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

- Custom screens
- Extra tables
- Configurable screens (screen designer)



# 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". To the 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 area 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".

**BROWSE HELP CENTER**

- LEARNING SUPEROFFICE**
  - User guide
  - Admin guide
  - Best practices & tips
  - Videos
- SUPPORT & FAQs**
  - FAQ search
  - Support for apps
- PRODUCT & UPDATES**
  - Product releases
  - Bugs and wishes
  - Pilot programs
  - Announcements
- FORUMS**
  - Getting started with SuperOffice forums
  - User forums
  - Administrator forums
- TECHNICAL**
  - API Forums
  - Product Extensibility

**POPULAR TOPICS**

- CONNECT EMAIL & DOCUMENTS**  
Connect your emails and documents to SuperOffice CRM. →
- IMPORT CONTACTS & PRODUCTS**  
Import customer data into SuperOffice CRM in one go. →

Webcasts  
Events  
Help Center & Community  
Talk with us



Thank you