



# Revolutionér din it infrastruktur - og se nye muligheder med SuperOffice som platform

Martin Jensen og Morten Larsen  
National Product Responsibles



# Mission, Ambition, Strategy and Goals

**Our Mission** is to help our customers improve their processes in marketing, sales and service.

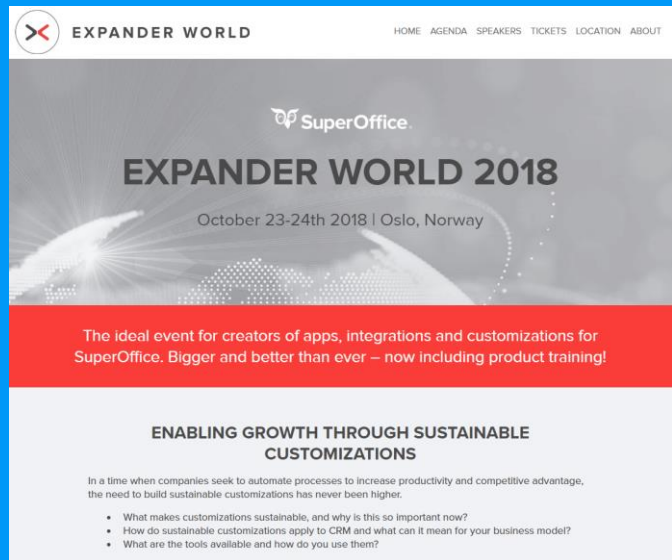
**Our Ambition** is to provide simplified solutions to complex problems and deliver professional services with a smile.

**Our Strategy** is to deliver CRM in the B2B market in Europe. We focus on standard software and product related professional CRM services. We are targeting companies that takes CRM seriously. We provide good value for money. We have an generic and horisontal product & market approach. In Innovation we want to be on a leading edge, not the bleeding edge.

**Our Goals** are to be the leading CRM vendor in our chosen European markets. We want minimun 10% organic revenue growth and 25% profit margin. Our Customer Success Metric is Product Usage. We want to be a good place to work.

# Sustainable Customization

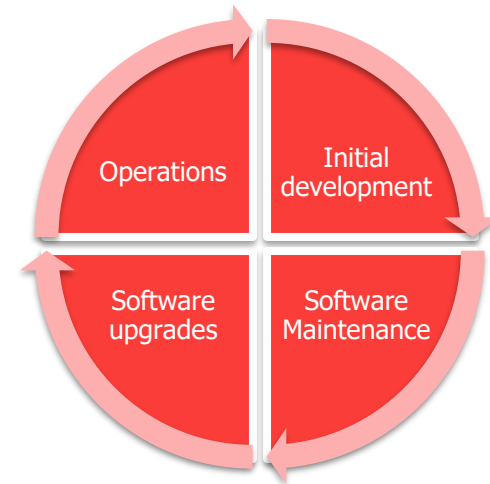
SuperOffice, Partners and Customers working together to create future proof, cost efficient CRM solutions.



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

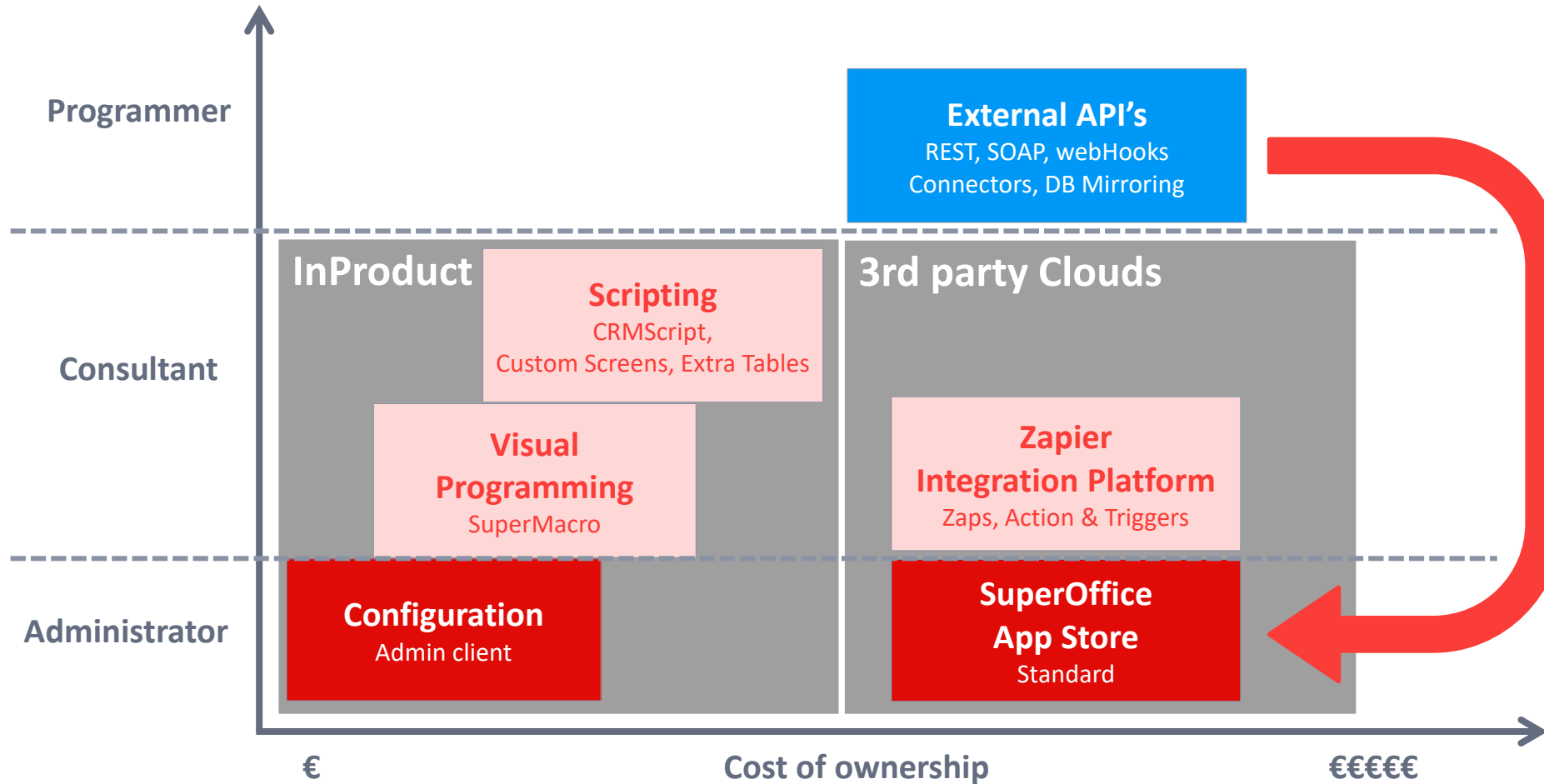
# History tells us that Customizations ....

- ... Can be static and does not follow evolution
- ... Sometimes are made too complex
- ... Can represent friction for moving forwards and update to new versions
- ... Can represent friction for moving to the cloud
- ... Total cost of ownership is too high



# Customization Tools Strategy

Right Tool for the Right Job



# The Sustainable Customization Manifesto

The more use of **standard software**, the better

The more use of **cloud services**, the better

The more use of **standard APIs**, the better

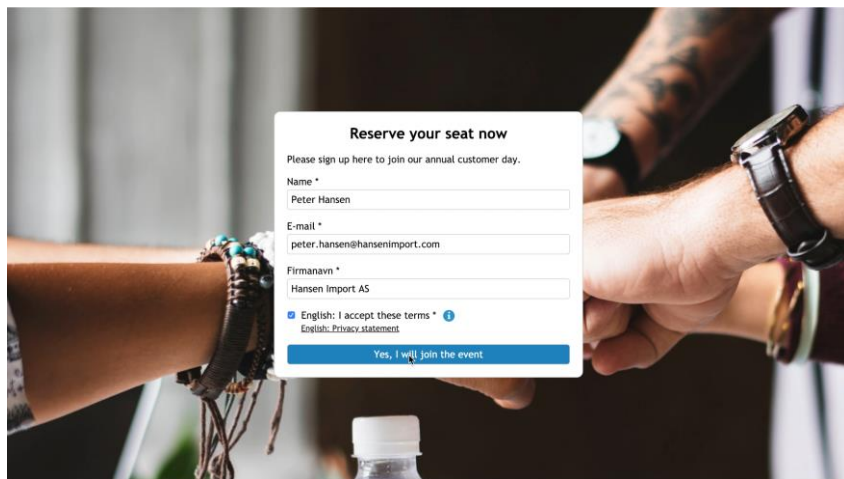
The **easier tool** you are using, the better

The **less code** you must write, the better



[illegible]

# Eksempel: Fra formular på hjemmesiden direkte i proces, fx til et potentielt salg



**Reserve your seat now**

Please sign up here to join our annual customer day.

Name \*  
Peter Hansen

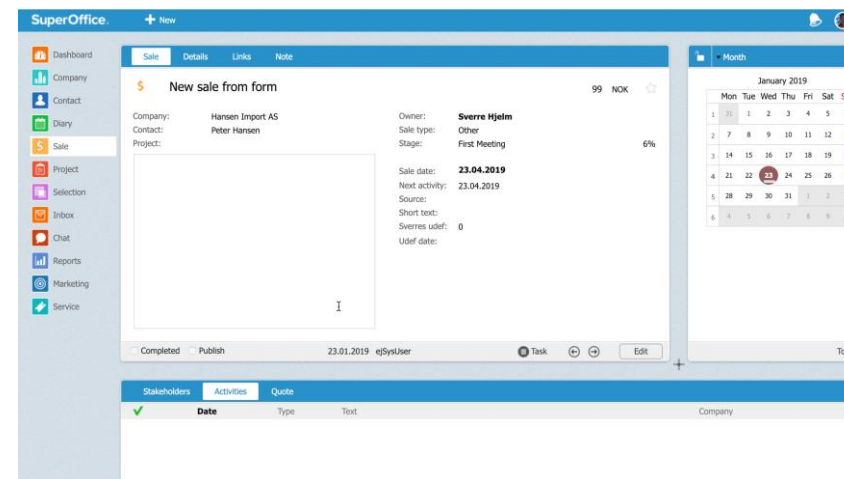
E-mail \*  
peter.hansen@hansenimport.com

Firmanavn \*  
Hansen Import AS

☒ English: I accept these terms \* [English Privacy Statement](#)

[Yes, I will join the event](#)

Makro



**SuperOffice** + New

**Sale** Details Links Note

**New sale from form** 99 NOK 6%

Company: Hansen Import AS  
Contact: Peter Hansen  
Project:

Owner: Sverre Hjeltn  
Sale type: Other  
Stage: First Meeting

Sale date: 23.04.2019  
Next activity: 23.04.2019  
Source:  
Short text:  
Sverres udef: 0  
Udef date:

Completed Publish 23.01.2019 ejSysUser Task Edit Today

**Stakeholders** Activities Quote

| Date | Type | Text | Company | Co |
|------|------|------|---------|----|
|------|------|------|---------|----|



Edit form

Form name:

Customer day sign up

Properties

Fields

Style

Double opt-in

Thank you page

Page for inactive form

Actions

Folder:

Description:

Customer day Sign-up form optimized to be shown in a separate browser window (eg. opened from a link in an e-mail). Double opt in is enabled

Language:

English

Managed by:

Deactivate form automatically:

☐ Until

☐ Max

☐ Use Google Analytics

Reserve your seat now

Please sign up here to join our annual customer day.

Name \*

Type your full name here

E-mail \*

Type your email address

Firmanavn \*

Type your company name

☐ English: I accept these terms \* 

English: Privacy statement

Yes, I will join the event

Save

Apply now

Cancel

SuperOffice

Menu

Edit form

Form name:  
Customer day sign up

Properties

Fields

Style

Double opt-in

Thank you page

Page for inactive form

Actions

☐ Create request

**How should a form submission be processed?**

☒ Automatically process all submissions. Create new contact if no match is found.

☐ Manually if submitter is unknown. Automatically if submitter is known.

☐ Manually for all submissions

**What should happen when the form is processed?**

Add contact to selection: ▼

Add contact to project: ▼

Add interests to contact: ▼

E-mail response: ☐

Execute CRMScript: ▼ (No Selection)

Save

Apply now

Cancel

-  Licences ✓
-  Users
-  Roles
-  Privacy
-  Lists
-  Quote/Sync
-  Workflow
-  Preferences
-  Chat
-  Options
-  Import
-  Fields
-  CRMScript

Status

SUPEROFFICE

DATABASE

Database owner:

Sverres Lisens

Serial number:

1501195380

Database type:

MSSQL 12

Next expiry date:

sverre80, Central

Next expiry date:

31.12.2019

User logged in:

Sverre Hjelm

Powered by:

SuperOffice NetServer 8.8 Stable (Build: 6949.DEV-SVERRE33), expires in 76 days.

SYSTEM NOTIFICATIONS

| Event       | Status | Message               | Activated  | Activated by - User ID | Activated                                                                           | Finished   | Type        |
|-------------|--------|-----------------------|------------|------------------------|-------------------------------------------------------------------------------------|------------|-------------|
| No Freetext | Active | business question bro | 04.09.2017 | SH                     |  | 04.09.2017 | System-wide |

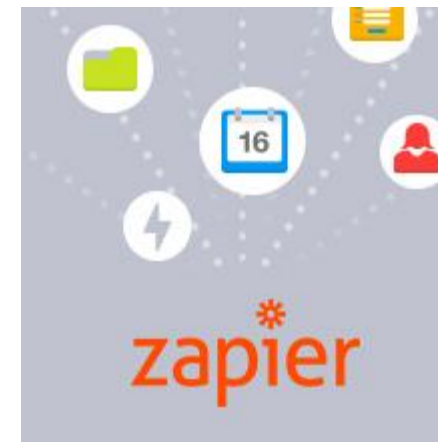
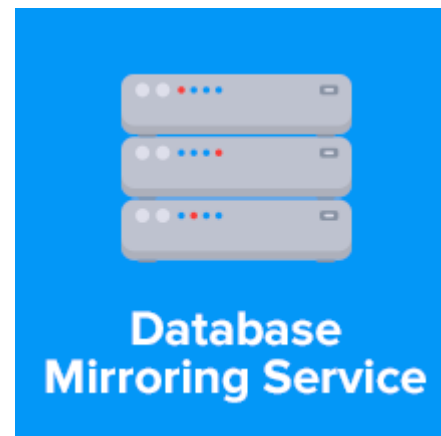
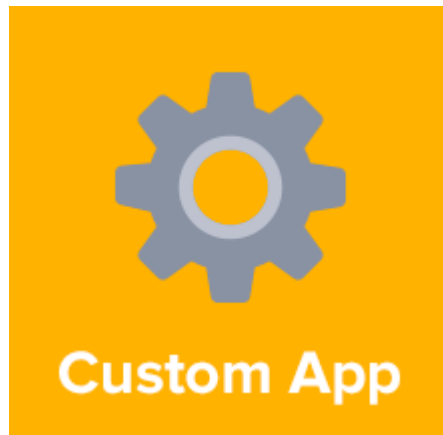
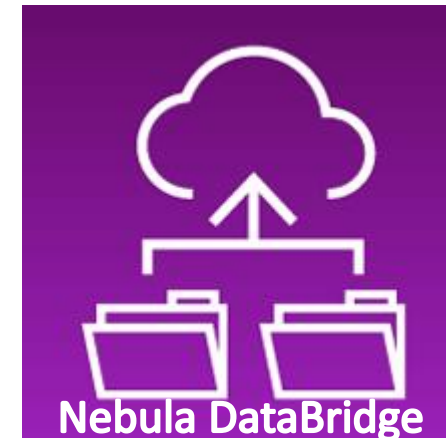
+ Add

 Delete

count : 1

 Refresh

# Inspirationer fra SuperOffice App Store



## A circular diagram with concentric circles. The central logo is a stylized 'C' or 'G' shape. The first ring contains logos for Google, Facebook, Dell, and others. The second ring contains logos for Twitter, LinkedIn, and others. The third ring contains logos for YouTube, Instagram, and others. The fourth ring contains logos for various other companies and organizations.

# En "Zap" forbinder flere app's i et workflow

- En "Zap" kan sættes op uden programmering
- En "trigger" starter en "Zap", fx hvis en person bliver oprettet, eller et salg går i vundet eller tabt
- En "action" bliver udført af en "Zap", fx send en mail eller en besked med Slack – eller opret et salg i SuperOffice når...





# Zapier-eksempel: notificering ved oprettelse af møde

The collage consists of four overlapping screenshots:

- Top Left:** A screenshot of the SuperOffice CRM interface showing a calendar view for Friday, March 29. A dropdown menu is open, showing filters for 'Møde inde' (Meeting in progress), 'DONG A/S', 'Jens Pedersen', 'Projekt', and 'Salg'. Below the calendar, there's a section titled 'Aftalt kundemøde med Jens om status på SuperOffice' with tabs for 'Beskrivelse', 'Detaljer', 'Deltagere', and 'Links'.
- Top Right:** A screenshot of the Zapier 'Choose an Action App' screen. It shows a search bar and a list of 'YOUR APPS' including 'Email' and 'SuperOffice CRM'. Below this, there's a 'BUILT-IN APPS' section with 'Formatter' and 'Email' options.
- Bottom Left:** A screenshot of the Zapier 'Set up Email by Zapier' screen. It shows the 'Setup Preview' section with fields for 'To' (kln@superoffice.dk), 'Subject' (Aktivitet oprettet med type "Opfølgning"), and 'Body' (HTML or Plain). The body content is a preview of the email notification.
- Bottom Right:** A screenshot of the final email notification. The subject is 'Aktivitet oprettet med type "Kundemøde" af "Bent Andreassen"'. The email body contains the following information:  
Hej Kim,  
  
"Bent Andreassen" har oprettet en ny aktivitet med følgende data:  
- Type: Kundemøde  
- Firma: DONG A/S  
- Person: Jens Pedersen  
- Starttidspunkt: 2019-03-29T09:30:00Z  
- Sluttidspunkt: 2019-03-29T10:30:00Z  
- Beskrivelse:  
Aftalt kundemøde med Jens om status på SuperOffice  
  
Visit this link to stop these emails: <http://zpr.io/gAUxZ>

# Database Documentation, Web Services, Scripting, REST API, SOAP API, Web API, Webhooks

1

## Reference

NetServer Web Services  
[Læs mere.](#)

2

## Database Documentation

SuperOffice Database  
[Læs mere](#)

3

## Scripting

[Læs mere](#)

# Community & DevNet



CRM Online | App Store | SuperOffice.com | Support | English

 Search...

HOME CUSTOMER TECHNICAL **DEVELOPER** THE PARTNERS

**DEVELOPER**

**DOCUMENTATION**

COM API - Application  
COM API - Database  
Customer Service  
Database Reference  
NetServer Core  
NetServer Web Services  
SuperOffice Web  
REST & SOAP

**DOWNLOADS**

General  
SuperOffice Events  
SuperOffice Netserver  
Expander SDK  
SuperOffice Web  
All Downloads

**ARTICLES**

All Articles  
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Windows Client  
NetServer  
Customer Service  
Code Samples

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Continuous Database  
Web Application  
Web Services  
Windows Application  
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Develop  
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Forum  
Register as a developer

**BLOG**

POPULAR DEVELOPER RESOURCES



**Documentation**  
Documentation on APIs and usage  
[Go to documentation](#)



**Downloads**  
Get utilities and code examples  
[Go to downloads](#)

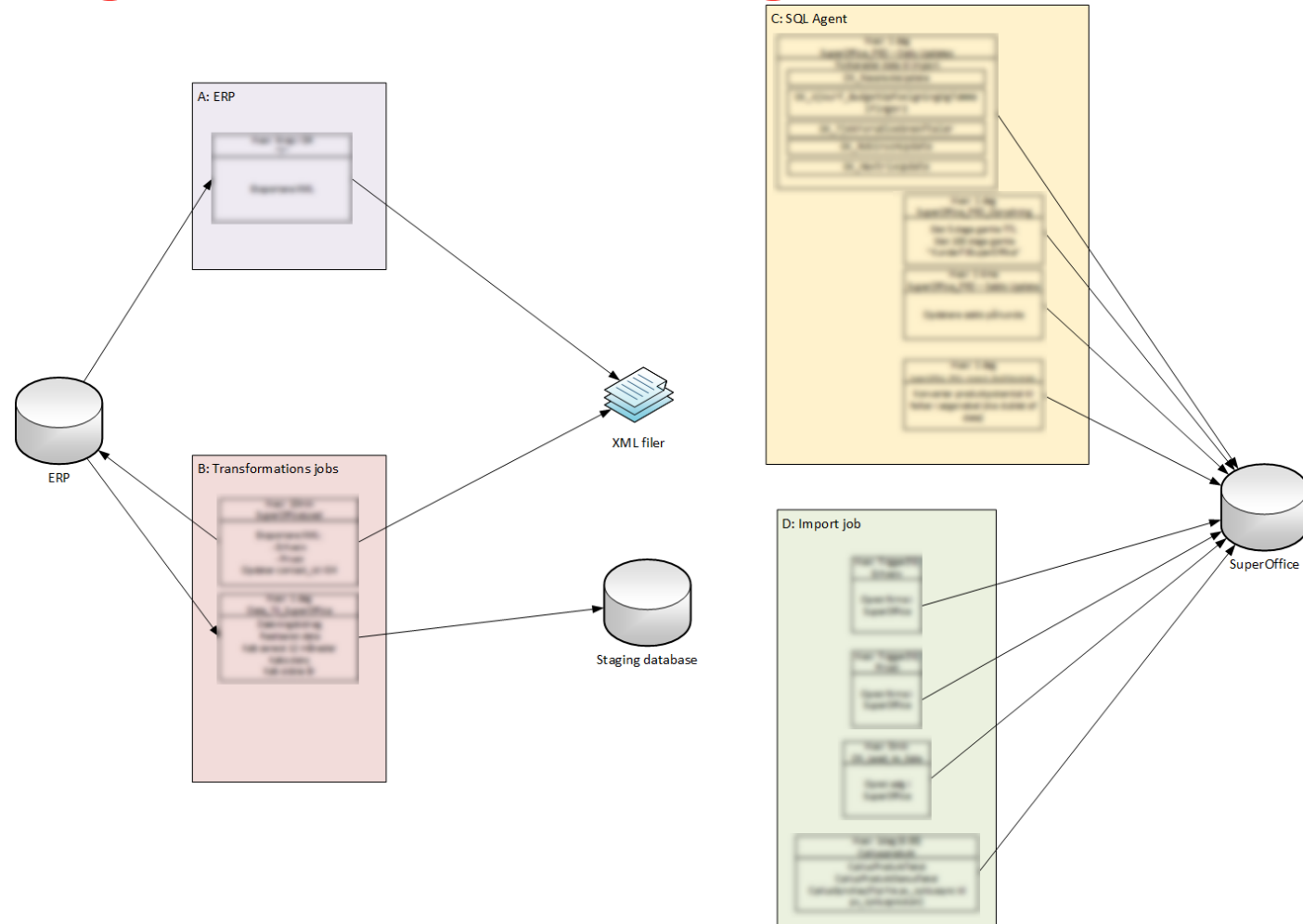


**Articles**  
Learn all about SuperOffice APIs  
[Read articles](#)

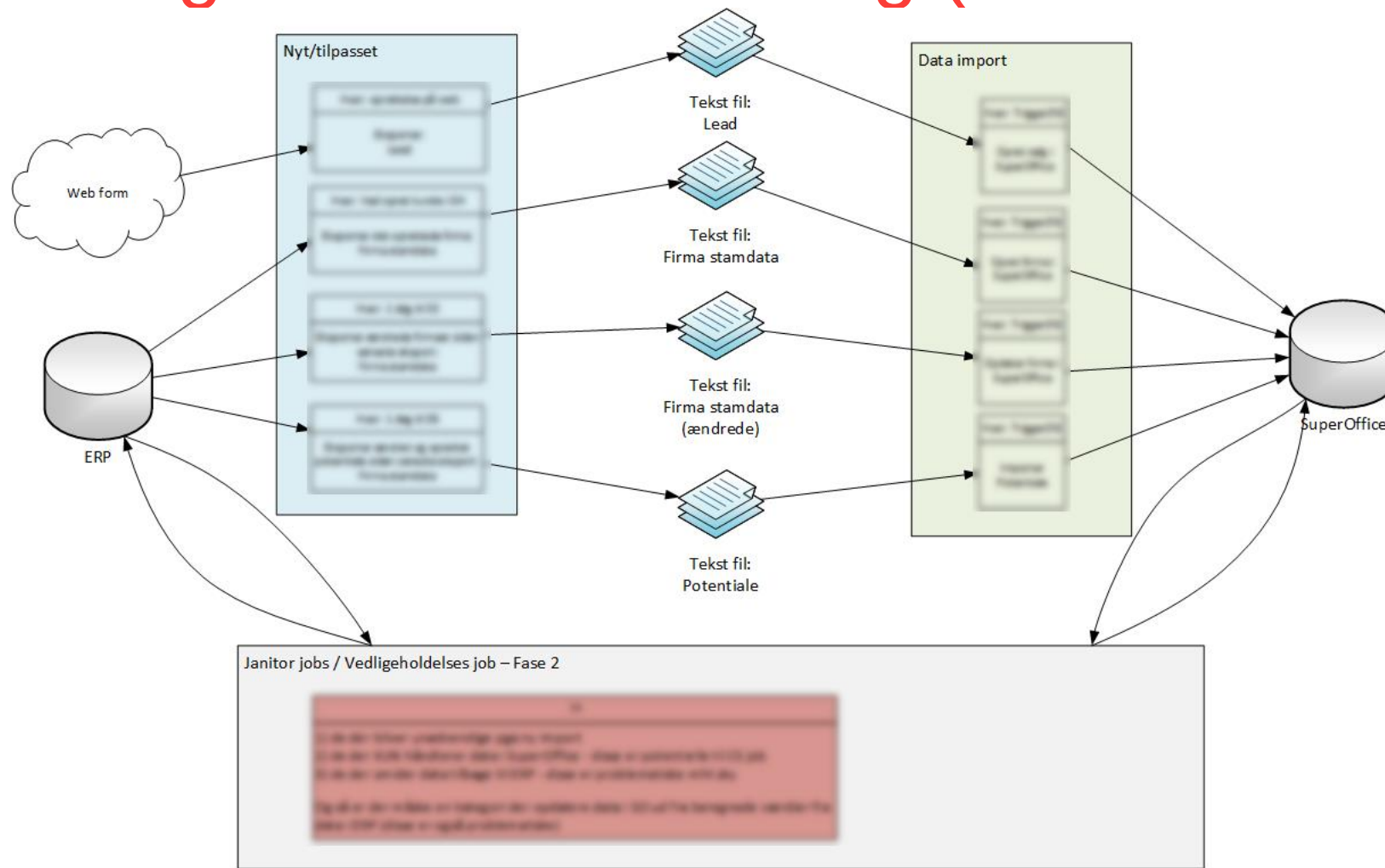
# Helt praktisk

- Hvad siger kunderne selv om udfordringer – oplevet og man vil ud af
- Rådgivning og oplæring
- Review-assistance
- Arkitekturworkshop
  
- CRMscripting
  - Eksempel: fx kontrol af indtastning / datakvalitet
  - Eksempel: summering af timer på projekt

# Case erfaring arkitektur - integration

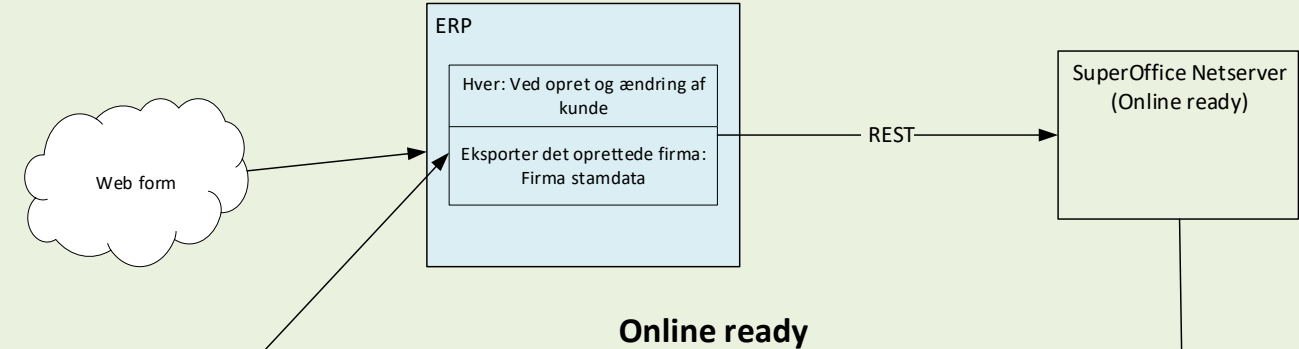


# Case erfaring arkitektur – forslag (til online ready)

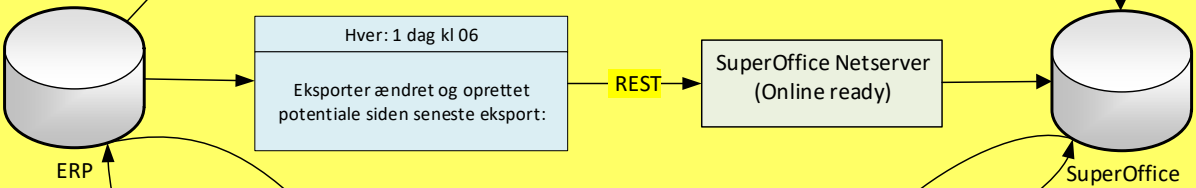


# Case erfaring arkitektur - løsning

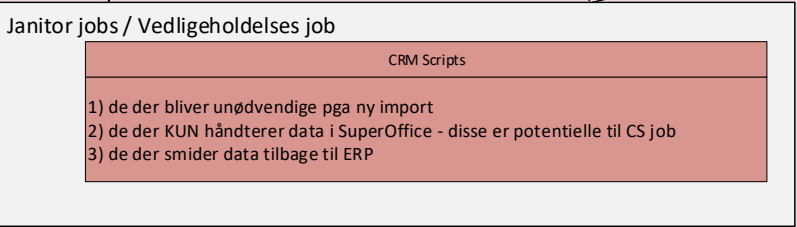
Fase 1



Fase 2



Fase 3

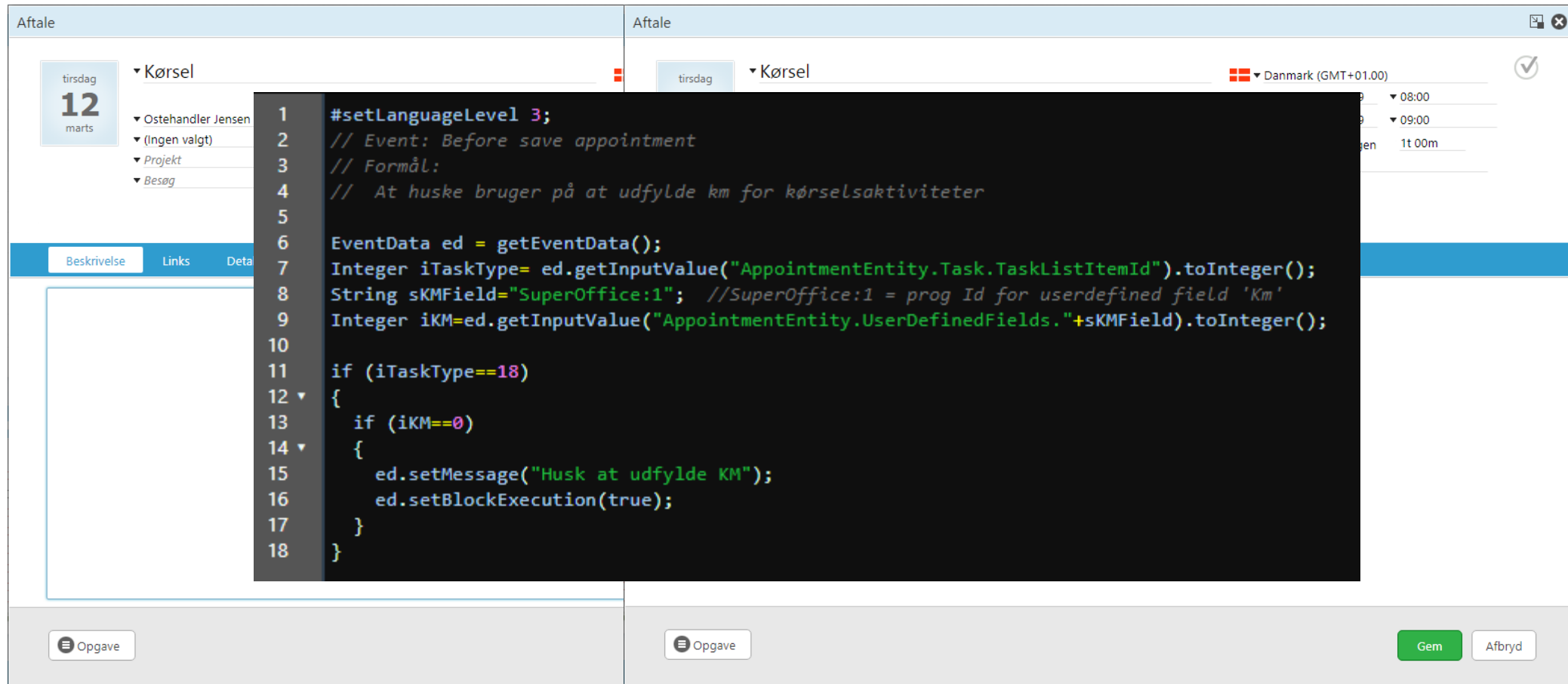




# Case erfaring arkitektur - løsning

- Knap til "straks" overførsel fra ERP => opdater med **REST**
- SQL job til datakvalitet => **CRM Scripts**
- ERP data der skal søges på => **Extra tabeller, Screens og udvidede udvalg**
- ERP data der skal vises => integreret **web panel** med visning fra eks BI
- Sikre data kvalitet => **CRM scripts** enten på trigger eller scheduleret
  
- Bemærk også at flere af vores integrationspartnere i dag har mulighed for at opdatere via triggere eller webhook i SuperOffice.

# CRMscripting, eksempel: Husk km på kørsel



The screenshot displays a CRM application window titled 'Aftale'. On the left, a sidebar shows a calendar for 'tirsdag 12 marts' and a list of tasks under 'Kørsel', including 'Ostehandler Jensen', '(Ingen valgt)', 'Projekt', and 'Besøg'. The main area shows a task detail view with tabs for 'Beskrivelse', 'Links', and 'Data'. A script editor is open, showing the following C# code:

```
1 #setLanguageLevel 3;  
2 // Event: Before save appointment  
3 // Formål:  
4 // At huske bruger på at udfylde km for kørselsaktiviteter  
5  
6 EventData ed = getEventData();  
7 Integer iTaskType= ed.getInputValue("AppointmentEntity.Task.TaskListItemId").toInteger();  
8 String sKMField="SuperOffice:1"; //SuperOffice:1 = prog Id for userdefined field 'Km'  
9 Integer iKM=ed.getInputValue("AppointmentEntity.UserDefinedFields."+sKMField).toInteger();  
10  
11 if (iTaskType==18)  
12 {  
13     if (iKM==0)  
14     {  
15         ed.setMessage("Husk at udfylde KM");  
16         ed.setBlockExecution(true);  
17     }  
18 }
```

The bottom of the window features a footer with an 'Opgave' button, a 'Gem' (Save) button, and an 'Afbryd' (Cancel) button.

-  Dashboard
-  Sagsbehandling
-  Kunder
-  Udvalg
-  Vidensbase
-  Statistik
-  Markedsføring
-  Produkter
-  Chat

SCRIPT

Navn: Opdater servicetid på projekt - auto/scheduler  
 Include-navn: timeconsumption\_script  
 Nøgle: wtkn4adTWpuabgYw

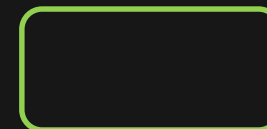
 Makroer og script  Rediger script  Kør script (nyt vindue)  Fejlfind script  Spor script

Script

Beskrivelse

```

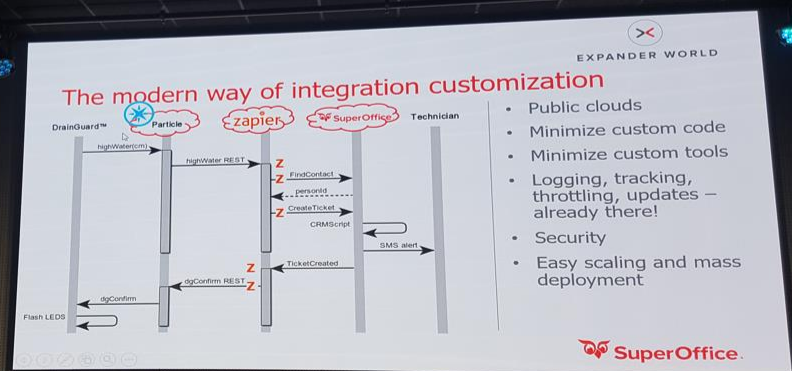
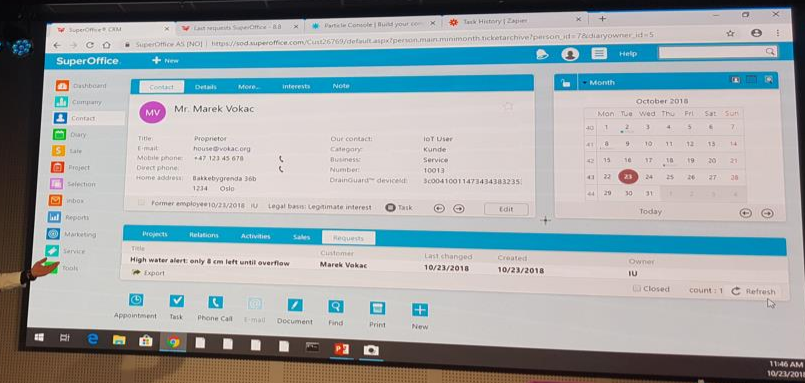
1  #setLanguageLevel 3;
2
3  Void calculate_request_time_consumption()
4  {
5      SearchEngine sep;
6      sep.addField("project.project_id");
7
8      for(sep.execute(); !sep.eof(); sep.next())
9      {
10         Float time_spent = 0.0;
11
12         SearchEngine se;
13         se.bypassNetServer(true);
14         //se.addField("ticket.id");
15         //se.addField("ticket.real_time_spent_internally");
16         //se.addField("ticket.real_time_spent_externally");
17         //se.addField("ticket.real_time_spent_queue");
18         se.addField("ticket.(ej_message->ticket_id).time_spent");
19         // se.addField("ej_message.time_spent");
20         // se.addCriteria("ej_message.ticket_id.x_project", "Equals", sep.getField(0));
21         se.addCriteria("ticket.x_projektrelation", "Equals", sep.getField(0));
22
23         for(se.execute(); !se.eof(); se.next())
24             time_spent += Float(se.getField(0)); // + se.getField(2).toInteger() + se.getField(3).toInteger();
25
26         if(time_spent > 0)
27             time_spent = time_spent / 60; //hours spent
28
29         NSProjectAgent pAgent;
30         NSProjectEntity getPEntity = pAgent.GetProjectEntity(sep.getField(0).toInteger()); // Load the project
31
32         Map m;
33         m.insert("SuperOffice:3", "[F:" + time_spent.toString(2) + "]");
34
35         getPEntity.SetUserDefinedFields(m);
36         pAgent.SaveProjectEntity(getPEntity);
37     }
38 }
```













# Erfa-møde hos OK

11. juni

"Standardiseringsrejsen  
på SuperOffice"

