

SuperOffice CRM Sharepoint integration

Præsentation af Sharepoint integration til SuperOffice



Dine værter:



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Connect with us



KOM I GANG MED SHAREPOINT DOCUMENTS

 SuperOffice®



Agenda

Introduktion

Fokus områder

Dokument håndtering:
SuperOffice vs SharePoint

Fordele ved den nye
integration

Hvordan virker den (demo)

Migreringstool

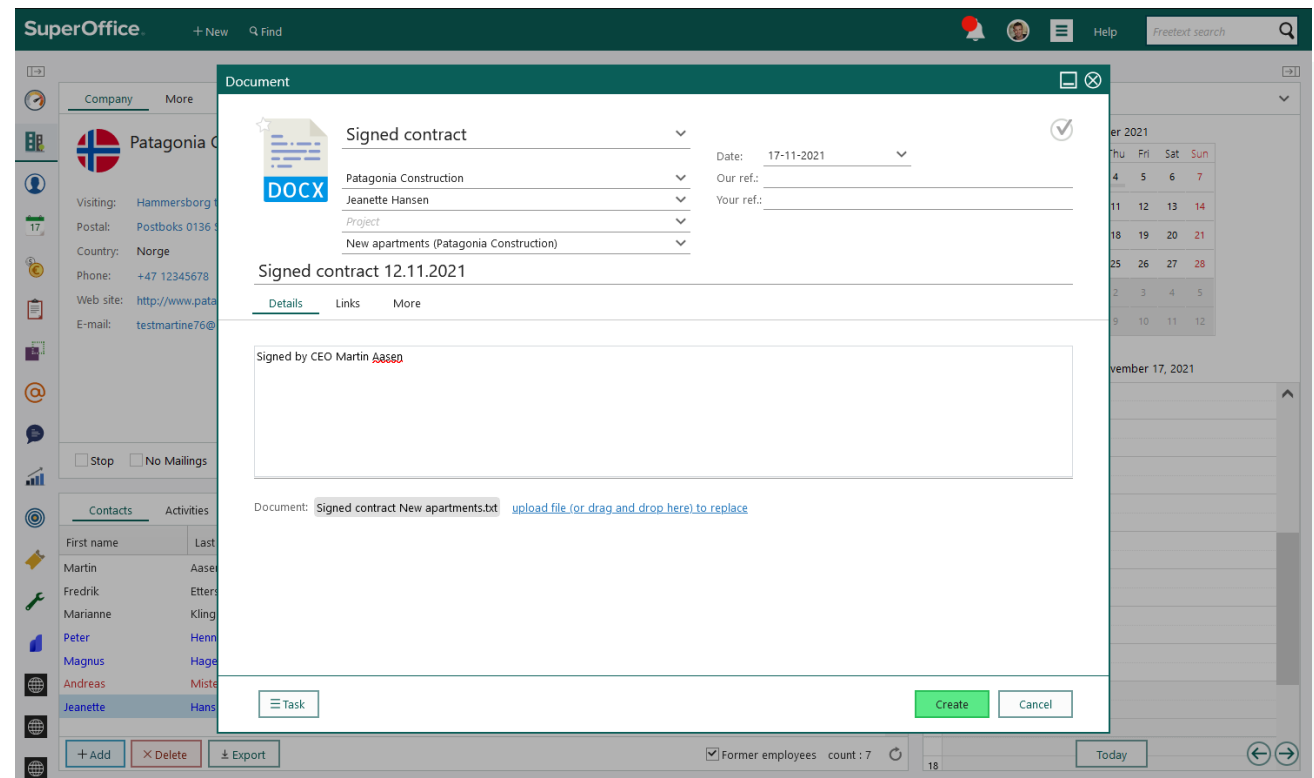
Migrerer dine eksisterende
dokumenter til SharePoint

Arbejde mere effektivt med dokumenter i SuperOffice CRM

Web
Tools

Mail
Link

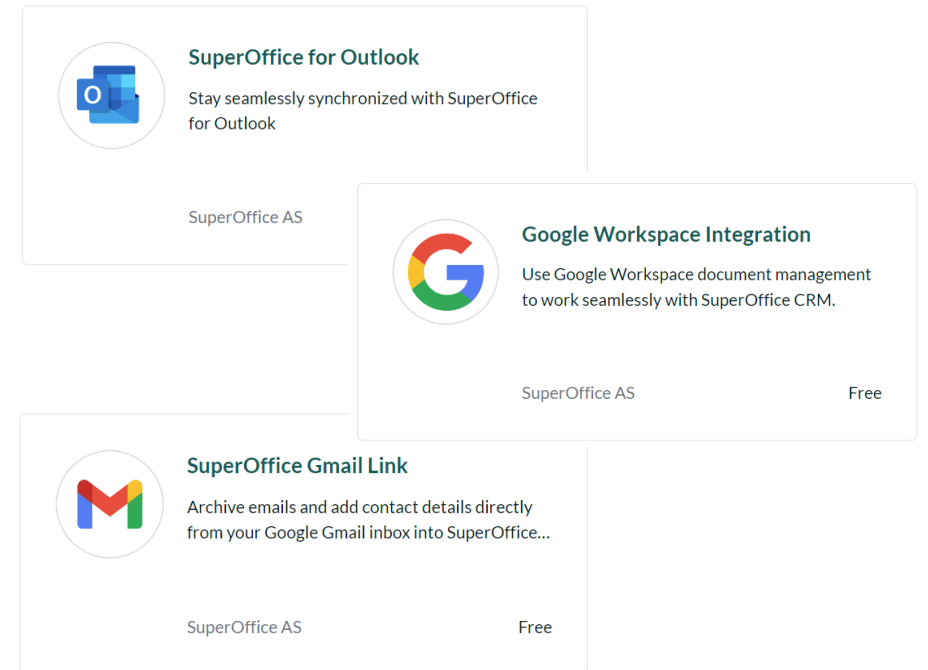
- Pre-designed skabeloner
- Automatisk udfyldelse med skabelon variabler
- Link automatisk dokumenterne til forskellige CRM områder
- Gem, del og samarbejd om dokumenter, emails og vedhæftede filer i SuperOffice



*Hosted by SuperOffice Online eller lokalt på virksomhedens servere.

Forbedre samarbejdet med Office apps

- **Log in** via din cloud identity provider
- **Opret, gem og find** dine dokumenter i SuperOffice, og få fordele af alle de funktioner, som der er til rådighed for dig med dit Office 365 abonnement.
- **Arbejde** med CRM data i din Outlook ved brug af SuperOffice for Outlook app
- **Ingen installation af lokal software** på din PC (Web Tools) er påkrævet. ALT er online



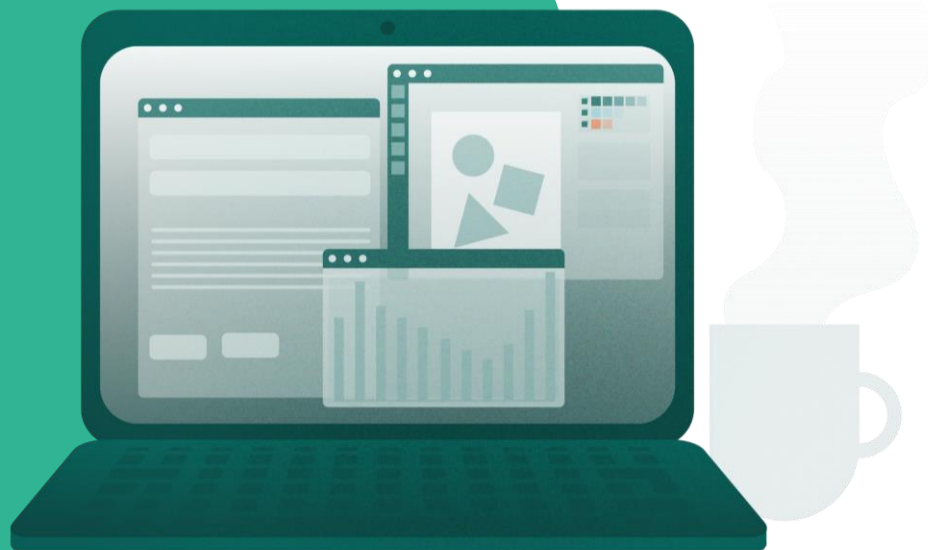
SHAREPOINT INTEGRATION



Fordele ved Sharepoint integrationen

- Alle dokumenter som er skrevet og arkiveret fra SuperOffice vil blive gemt i SharePoint Online repository
- Adgang til flere avancerede funktioner via SharePoint (fritekstsøgning, gruppering, versionering)
- Arbejde sammen om og i dokumenterne på samme tid
- Alt er online, og giver mulighed for tilgængelighed på flere forskellige enheder (pc, tablets, mobile)
- Reducere IT administration og bruger support





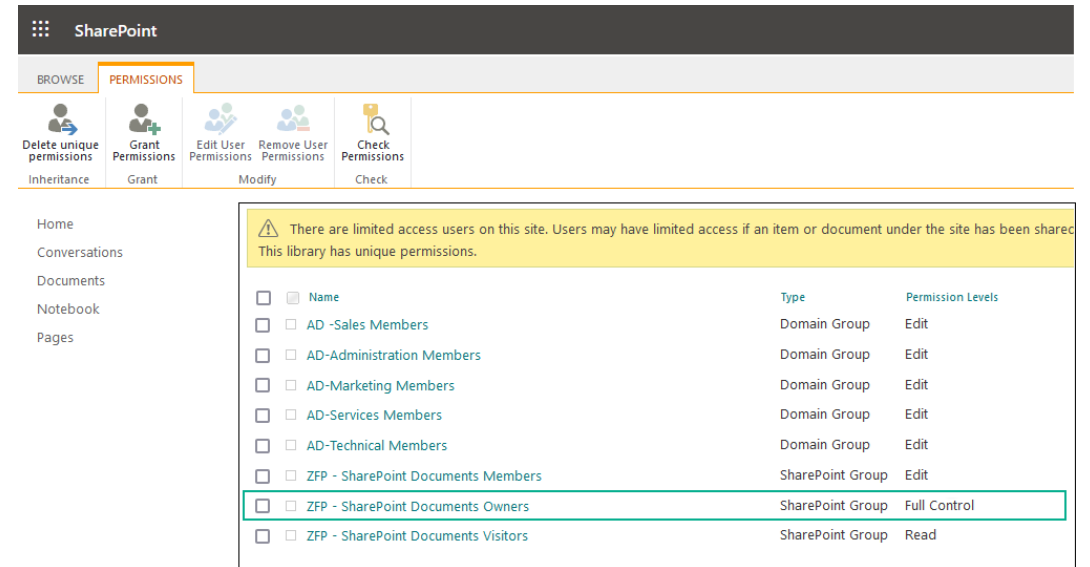
HVORDAN KOMMER DU IGANG

Systemkrav:

- SuperOffice Online subscription
- Microsoft 365 for business subscription
- Bruge Sign in med Microsoft i SuperOffice Online (AAD)

SharePoint Site

- Separate SharePoint site
- 2 dokument biblioteker til:
 - Dokumenter
 - Skabeloner
- Integrationen benytter Azure Active Directory grupper



The screenshot shows the SharePoint interface with the 'PERMISSIONS' tab selected. A warning message at the top states: 'There are limited access users on this site. Users may have limited access if an item or document under the site has been shared. This library has unique permissions.' Below this, a table lists the permissions for the library.

<input type="checkbox"/>	Name	Type	Permission Levels
<input type="checkbox"/>	AD -Sales Members	Domain Group	Edit
<input type="checkbox"/>	AD-Administration Members	Domain Group	Edit
<input type="checkbox"/>	AD-Marketing Members	Domain Group	Edit
<input type="checkbox"/>	AD-Services Members	Domain Group	Edit
<input type="checkbox"/>	AD-Technical Members	Domain Group	Edit
<input type="checkbox"/>	ZFP - SharePoint Documents Members	SharePoint Group	Edit
<input type="checkbox"/>	ZFP - SharePoint Documents Owners	SharePoint Group	Full Control
<input type="checkbox"/>	ZFP - SharePoint Documents Visitors	SharePoint Group	Read

DEMO



Migrering af SuperOffice dokumenter til SharePoint

(Flytte eksisterende dokumenter fra So_arc)



Forberedelse til migrering

- FØR migrering - SharePoint integration være opsat
- Alle SuperOffice brugere skal have været logget ind
- Ny ejer på dokumenter, hvor ejer IKKE er bruger på SharePoint
- Autorisering af SharePoint App
- Flytning succes – sletning fra kildebiblioteket
- Dokumenter som IKKE kan flyttes vil tilgængelig som hidtil

Document library - Bransjeløsning Bygg og Anlegg (cust24057)
CONNECTING SUPEROFFICE TO YOUR DOCUMENT PRODUCTIVITY PLATFORM

Microsoft SharePoint Online
https://sobransje.sharepoint.com

SuperOffice documents

Site in SharePoint:

Document library

Folder structure:

Template type and year
User group and year
Author and year
Template type and year
Company name and year
Project name and year

Document library

SharePoint document properties

Update SharePoint document properties with SuperOffice data

Save Cancel

Migreringstool i Administrator klienten

CRM Online – Administrator

Migreringstool tilgængelig i administrator modulet

The screenshot displays the SuperOffice Administrator interface. On the left is a vertical navigation menu with the following items: Licences, Users, Roles, Privacy, SAINT, Lists, Quote, Workflow, and Preferences (highlighted in dark green). The main content area has a top navigation bar with 'Preferences', 'Global preferences', 'Video meetings', and 'Document library' (underlined). Below this, the page title is 'Document library'. A message states 'This SuperOffice site is connected to:' followed by the Microsoft SharePoint Online logo and the text 'Microsoft SharePoint Online https://'. There are two buttons: 'Change' and 'Settings' (highlighted in green). Below the buttons is a blue link: 'Move documents from a previously used library, or open migration overview'. A green arrow points from the bottom of the page towards this link.

Migrerings Guide

- Guiden indeholder 3 trin/steps:



Move documents between document libraries

Move documents from a previously used library to the current document library

Step 1 - Select documents



Step 2 - Review and test



Step 3 - Confirm and schedule job

Next step

Next step

Previous step


Cancel

Start job now

Trin 1 – Vælg dokumenter

Vælg kriterie:

- Alle dokumenter oprettet efter “dato”
 - Alle dokumenter
 - Alle dokumenter fra udvalg
-
- Spring over dokumenter fra “tidligere ansatte”

 Move documents between document libraries
Move documents from a previously used library to the current document library

Step 1 - Select documents > Step 2 - Review and test > Step 3 - Confirm and schedule job

Select documents to move to:

All documents created after: 01/01/2021

All documents

All documents in selection: Documents: Our offers

Skip documents created by SuperOffice users that are not SharePoint users (e.g. former employees)

Previous step Next step Cancel

© SharePoint

Step 2 – Validering og test

- Validering og test af kriterier
- Identificering af antal dokumenter
- Identificering af antal skabeloner
- Adgang til SharePoint bibliotekerne



Move documents between document libraries

Move documents from a previously used library to the current document library

Step 1 - Select documents



Step 2 - Review and test



Step 3 - Confirm and schedule job

Analyzing documents to be moved

- ✓ Identifying number of documents - 8
- ✓ Identifying number of templates - 0
- ✓ Access to target document library: https://
- ✓ Access to target template library:
- ✓ Testing user credentials
- ✓ Testing access for users without credentials (app permissions)
- ✓ Testing access rights for user groups (visible for)
- ✓ Identifying documents to migrate

Documents to be moved - estimates

Total number of documents 8

Documents omitted 1

Documents already moved 6

Documents to be moved 1


Previous step

Next step

Cancel

Step 3 – Bekræft og planlæg job

- Opsummeringssektion
- Note sektion
- Start job nu



Move documents between document libraries

Move documents from a previously used library to the current document library

Step 1 - Select documents > Step 2 - Review and test > **Step 3 - Confirm and schedule job**

Summary

Target library: <https://sornd.sharepoint.com/sites/ErikSuperOfficeSharePoint/Migration Documents II>
Target template library: <https://sornd.sharepoint.com/sites/ErikSuperOfficeSharePoint/Migration Templates II>
Selected documents: All documents created after Fri Jan 01 2021
Total number of documents: 3
Omitted documents: 0
Documents already moved: 2
Templates to be moved: 1

Notes

Documents owned by users that do not exist in SharePoint, will get a new owner in SharePoint
Documents that are successfully moved will be deleted from the source libraries
Documents that cannot be moved will still be available

[Previous step](#) [Start job now](#) [Cancel](#)

MIGRERINGS OVERSIGT

I oversigten kan I se igangværende og tidligere jobs.
Derudover vil I kunne se detaljer for hvert job

Document library - Office Integration SORND (cust40787) 

CONNECTING SUPEROFFICE TO YOUR DOCUMENT PRODUCTIVITY PLATFORM




Move documents from a previously used library to the current document library

Date	Status - (status)	Start	End	#moved	Source	Details
14.6.2022	▲ CompletedWithFailures	14.6.2022	14.6.2022	17	All documents	Details...
17.6.2022	Completed	17.6.2022	17.6.2022	2	All documents	Details...



Move documents from a previously used library to the current document library

Date	Status	Start	End	#moved	Source	Details
8/24/2022	Completed	08/24/2022 - 1:08 PM	08/24/2022 - 1:11 PM	31	All documents	Details...
8/24/2022	Completed	08/24/2022 - 1:14 PM	08/24/2022 - 1:14 PM	2	All documents	Details...
8/25/2022	Documents started	08/25/2022 - 1:46 PM		1	All documents created after Fri Jan 01 2021	Details...

Move documents

Close

OVERSIGT - DETALJER

- Opsummering
- Status

Job details

Summary

Target library: https://
Target template library: https://
Selected documents: All documents
Total number of documents: 2
Omitted documents: 0
Documents already moved: 1
Templates to be moved: 1

Status - Completed

Job started at 08/24/2022 - 1:14 PM by Erik Lebiko.
Job completed at 08/24/2022 - 1:14 PM
1 of 1 templates have been moved
1 of 1 documents have been moved
0 document migrations failed
0 documents have been skipped.

Close

Opsummering

Dokument- håndtering

SuperOffice vs Sharepoint

Cloud fordele

Cloud collaboration og
ingen lokalt installeret
software

Migreringsværktøj

Migrer eksisterende
dokumenter til SharePoint



Tak for i dag!

Husk

Webinar om Tilbud og salgsopfølgning den 8. december

SuperOffice.dk/events

 **SuperOffice®**