

With the SuperOffice for Outlook add-in you can save contacts and archive e-mails from your e-mail client. SuperOffice for Outlook provides access to your CRM data presented in an intuitive and user-friendly add-in in your e-mail client. Read this guide to get started with the SuperOffice add-in and to get an overview of the functions available.



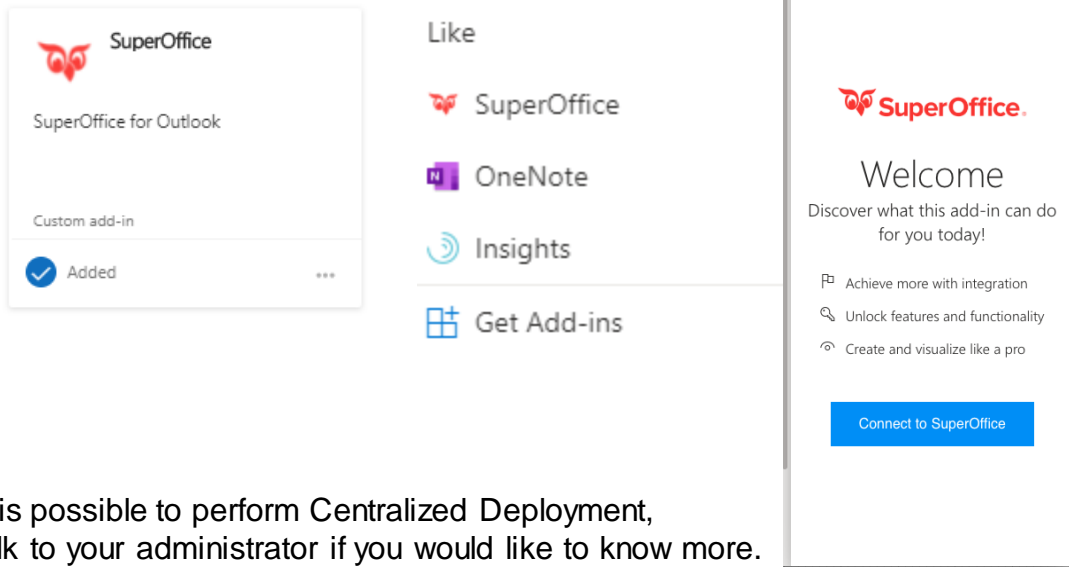
for



Add SuperOffice to your Outlook mailbox

1. Log in to **Office.com** and start **Outlook**. (Or log in via **Outlook.com**)
2. In **Outlook** select an e-mail in the inbox and select the three dots in the right corner of the e-mail.
3. Select the option on the bottom of the list called **Get add-ins**.
4. In the dialogue for **Add-ins for Outlook**, search for **SuperOffice** in the search field.
5. When the SuperOffice add-in is displayed, select **Add**
6. On the dialogue **One last thing...** select **Continue**
7. The SuperOffice add-in for Outlook should now be available from the three dots (More actions) in the right corner of an e-mail.

Your administrator can help you if you need.

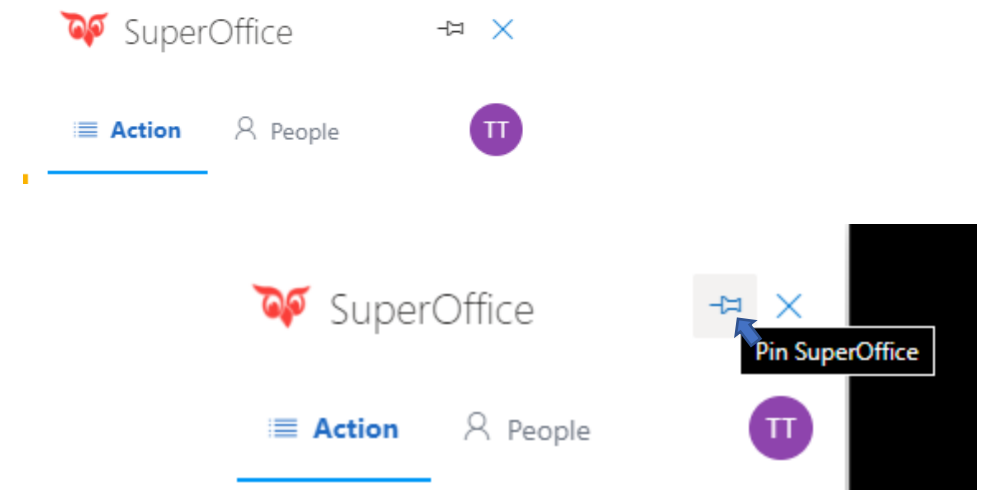


It is possible to perform Centralized Deployment, talk to your administrator if you would like to know more.

Pin/Unpin the add-in

After you have added SuperOffice as an add-in in Outlook, you can pin the add-in, so it is easily available when you're reading or writing an email message.

1. Select the three dots (**More actions**) on the right corner of an e-mail.
2. Select **SuperOffice** add-in near the bottom of the more actions list.
3. When the sidebar is displayed, press the pin symbol once to pin the sidebar to the page.
4. The side bar will now be available when reading and writing e-mails.
5. To unpin the SuperOffice Add-in press the Pin symbol again, and notice that the symbol will change its state.



General

Action

The Action menu is used to show the main actions in SuperOffice for Outlook. Once the add-in is added, you can select an action to interact with SuperOffice.

Click to add new contact

If the sender/recipient is unknown to SuperOffice, you will get a line letting you know that this person is unknown to SuperOffice. You also get the opportunity to add this person as a new contact in SuperOffice.

Save to SuperOffice

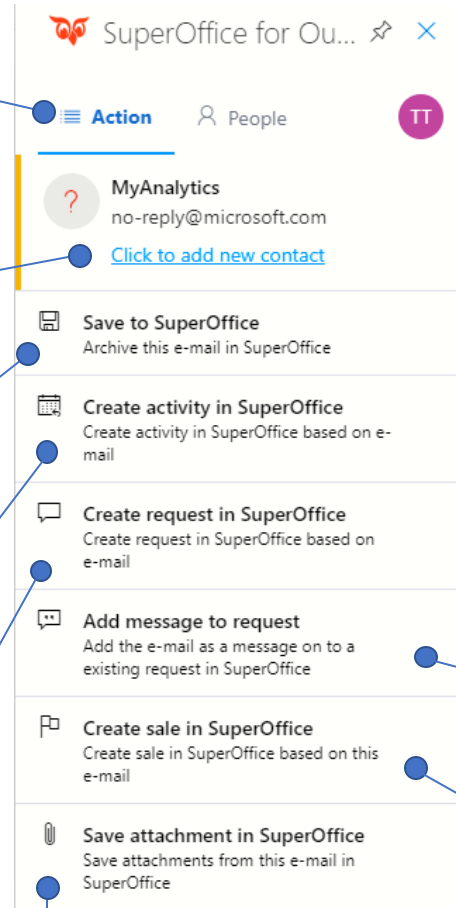
If you would like to archive the e-mail in SuperOffice, you will be able to do so, by selecting **Save to SuperOffice**.

Create activity in SuperOffice

If you would like to create an activity in SuperOffice based on the e-mail, you will be able to do so by selecting this option.

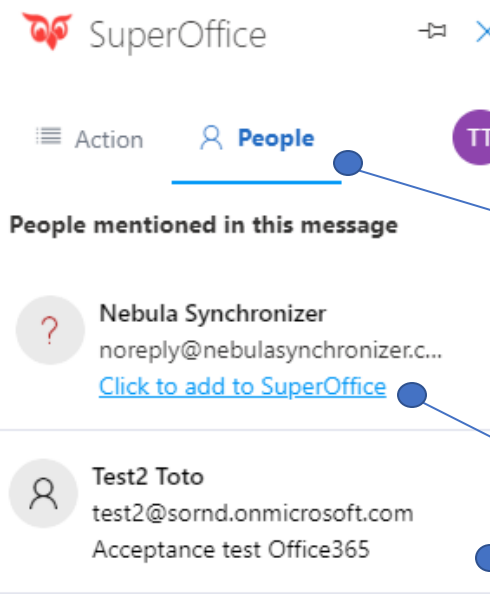
Create request in SuperOffice

If you would like to create a request in SuperOffice based on the received e-mail, you will be able to do so by selecting this option.



Save attachments in SuperOffice

If you would like to save the attachments found in the received e-mail to SuperOffice, you will be able to do so by selecting this option.



Add message to request

If you would like to add a message to an already existing request in SuperOffice, you will be able to do so by selecting this option.

Create sale in SuperOffice

If you would like to create a sale in SuperOffice, you will be able to do so, by selecting this option.

Disconnect from SuperOffice

If at some point you would like to disconnect from SuperOffice, select this Button and select **Disconnect from SuperOffice**.

People

The people menu will display actions related to the people mentioned in the e-mail in question.

Click to add to SuperOffice

Select **click to add to SuperOffice** if you would like to add the person as a contact/company in SuperOffice.

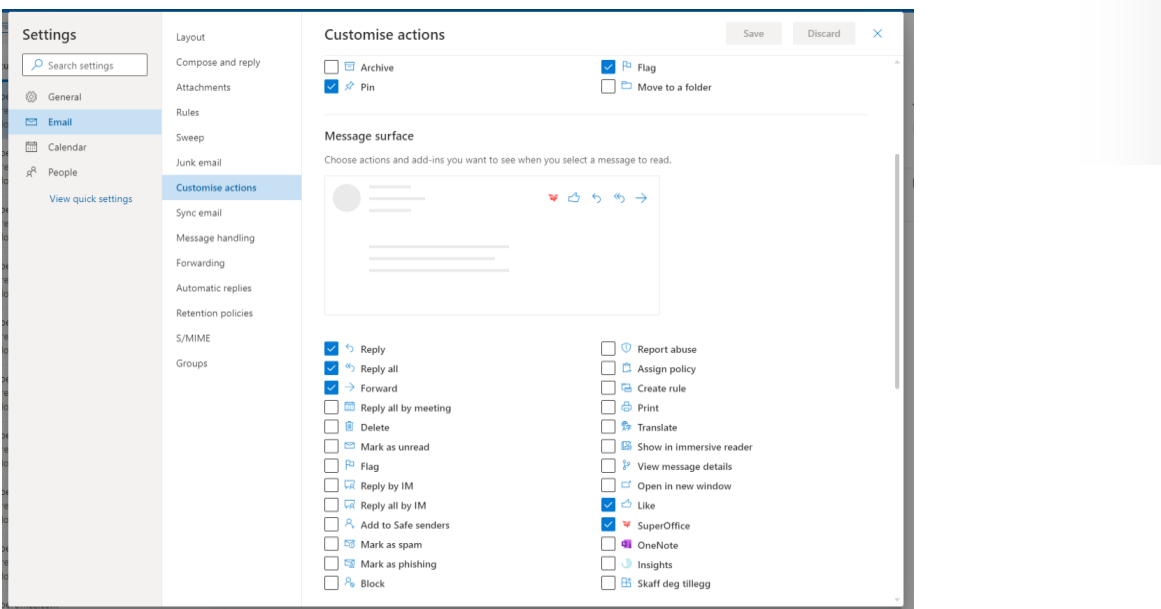
Known contact

Select the contact that is known to you to view information about sales, projects and activities connected to the selected person.

Add SuperOffice as a shortcut on the message surface

If you don't feel like pinning the add-in you can add SuperOffice for Outlook as a shortcut. To add SuperOffice for Outlook in the toolbar follow these steps:

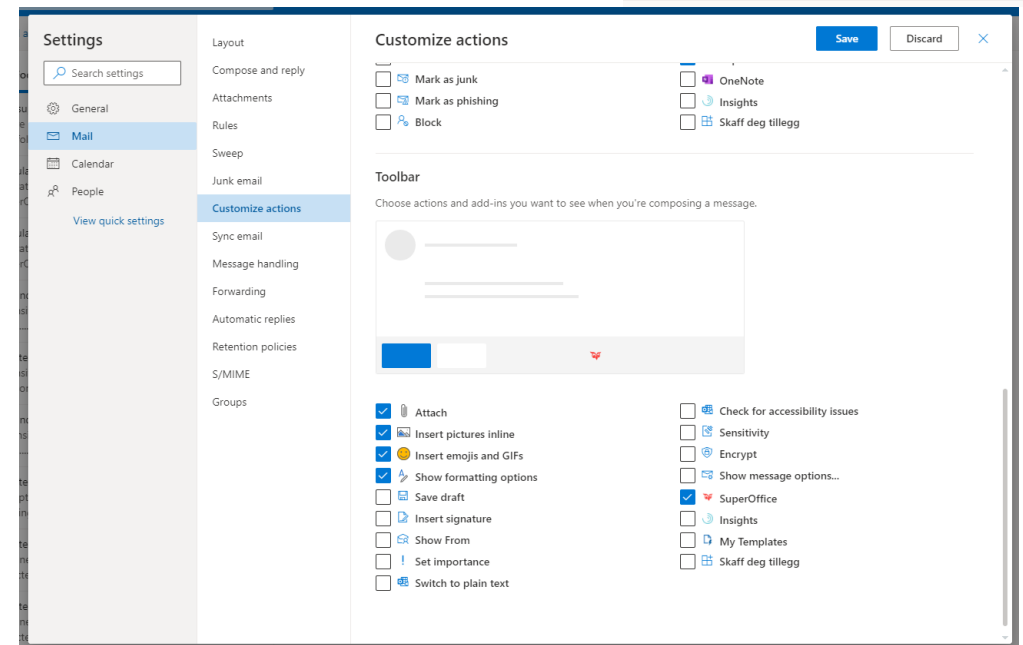
1. Select the cogwheel and select **Show all Outlook-settings**
2. Choose **Mail** in the panel on the right side.
3. Select **Customize actions** and check the checkbox for SuperOffice under the header **Message surface**.
4. Press **Save** and then exit the settings page.



Add SuperOffice as a shortcut in the Outlook toolbar

If you don't feel like pinning the add-in you can add SuperOffice for Outlook as a shortcut. To add SuperOffice for Outlook in the toolbar follow these steps:

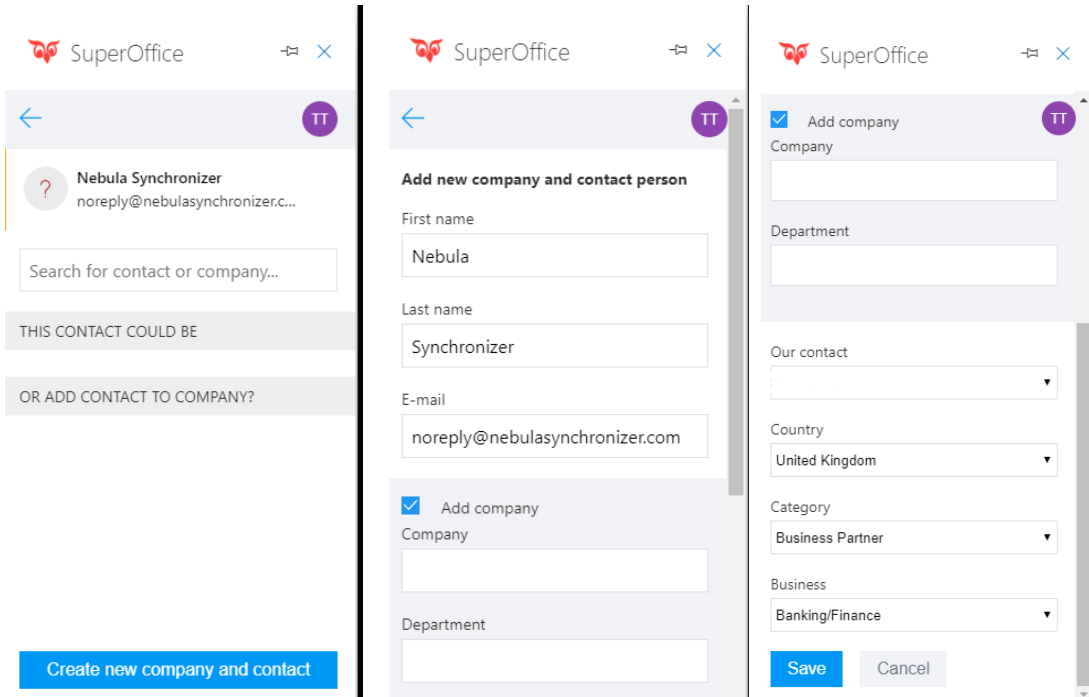
1. Select the cogwheel and select **Show all Outlook-settings**
2. Choose **Mail** in the panel on the right side.
3. Select **Customize actions** and scroll down to the header **Toolbar** and enable the SuperOffice checkbox
4. Press **Save** and then exit the settings page



Add an unknown contact from e-mail

To add a new person from a received e-mail to SuperOffice follow these steps:

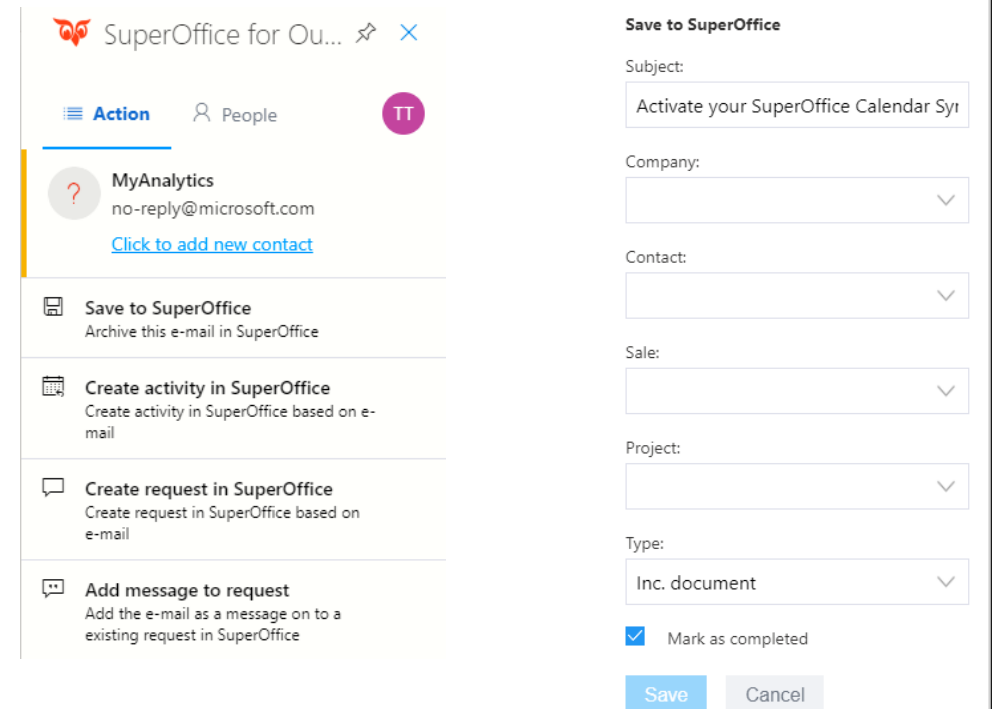
1. Open the e-mail from the person you want to add as a contact.
2. Select the three dots (More actions) and navigate to the bottom of the list and select SuperOffice from the list.
3. In the SuperOffice sidebar in the space where it says **Unknown e-mail address** select **Click to add a new contact**.
4. Search for a company, if the user does not have a company registered in your SuperOffice database, select **Create new company and contact**
5. Fill out the fields and select **Save**.



Save e-mail in SuperOffice

To save an e-mail received in Outlook, please follow these steps:

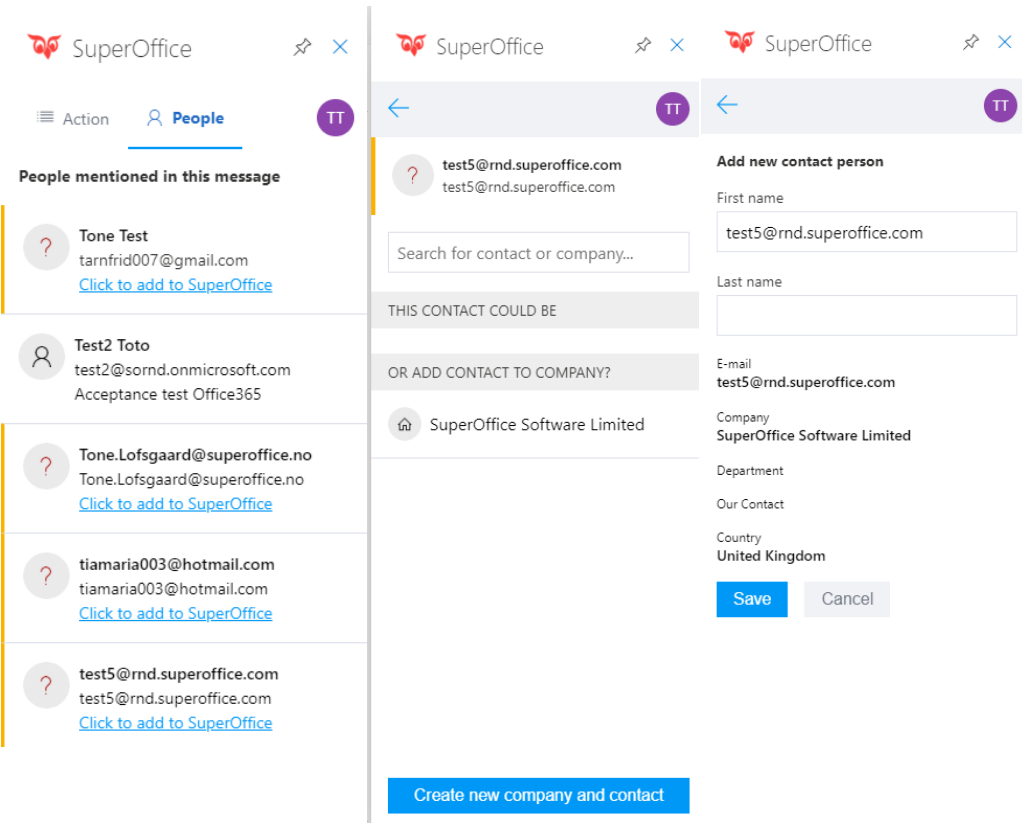
1. Open the e-mail from the person you want to add as a contact.
2. Open the SuperOffice for Outlook sidebar and navigate to the bottom of
3. Select **Save to SuperOffice**
4. Make the appropriate changes to the fields
5. Select **Save**



Add contacts mentioned in email

To add a person a contact from SuperOffice to the local address book on your device follow these steps:

1. Navigate to the **People** tab
2. Select **Click to add to SuperOffice** on the contact you would like to add.
3. Select if you would like to save to contact as a contact to an already existing company or if you would like to save a new company.

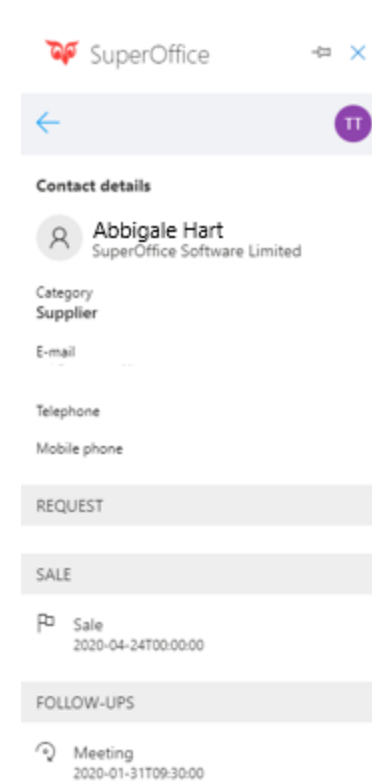


The screenshot shows the SuperOffice Outlook interface. On the left, the 'People' tab is active, displaying a list of contacts mentioned in the current email. The contacts listed are: Tone Test (tarnfrid007@gmail.com), Test2 Toto (test2@sornd.onmicrosoft.com), Tone.Lofsgaard@superoffice.no, tiamaria003@hotmail.com, and test5@rnd.superoffice.com. Each contact has a 'Click to add to SuperOffice' link. The 'Add new contact person' dialog is open, showing the following fields: First name (test5@rnd.superoffice.com), Last name, E-mail (test5@rnd.superoffice.com), Company (SuperOffice Software Limited), Department, Our Contact, and Country (United Kingdom). The 'Save' button is highlighted in blue. At the bottom, there is a button labeled 'Create new company and contact'.

Information about contacts

To view information about a known contacts sales, projects and activities follow these steps:

1. In the SuperOffice sidebar on the **Action/People** tab select the name of the known contact.
2. You will be able to see vital contact details, as well as information on their requests, Sales and Follow-ups.



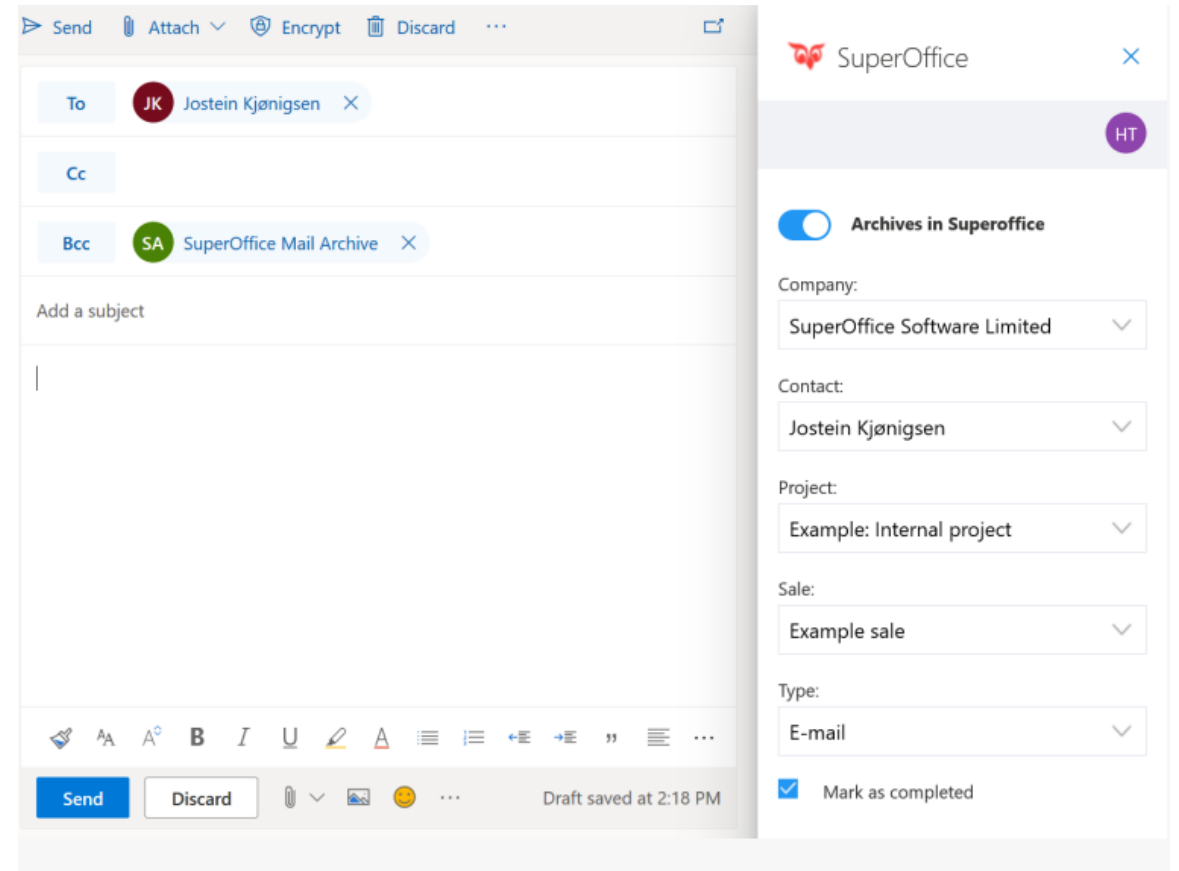
The screenshot shows the SuperOffice Outlook interface displaying the contact details for Abbigale Hart. The contact is categorized as a Supplier. The details include: Category (Supplier), E-mail, Telephone, and Mobile phone. Below the contact details, there is a list of requests, sales, and follow-ups. The first request is a Sale on 2020-04-24T00:00:00. The first follow-up is a Meeting on 2020-01-31T09:30:00.

Send and Archive

When composing a new email, you have the possibility to archive the email to SuperOffice when sending it, to do so follow the below steps.

1. Select **New Message**
2. Enter the recipient of the emails **To** field.
3. Write the email
4. Select the SuperOffice Owl button
5. In the add-in panel fill in the missing information
6. On the email – Select **Send** to Send and Archive the email.

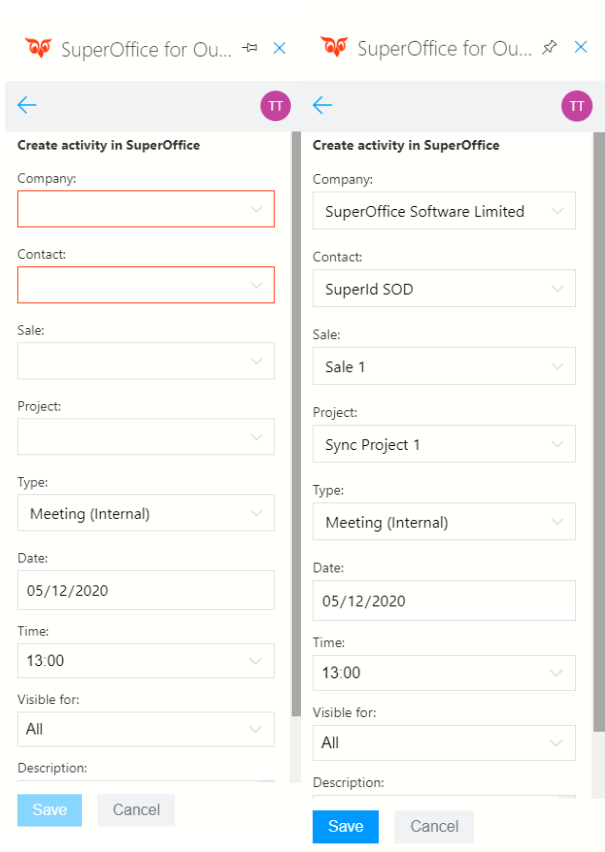
Note: In the email, on the field **Bcc** the text **SuperOffice Mail Archive** will be displayed. This is needed to make sure the email is archived in your SuperOffice installation.



Create activity in SuperOffice

To create an activity in SuperOffice from Outlook, please follow the below steps:

1. Open the e-mail from the person you want to add as a contact.
2. Select **Create activity in SuperOffice** in the Outlook sidebar.
3. Make the appropriate changes to the fields.
5. Select **Save**.

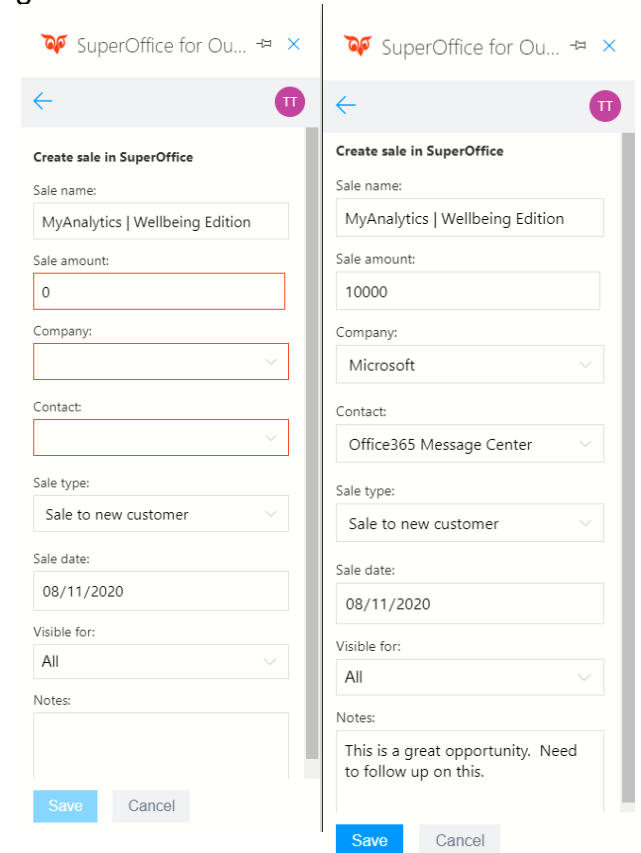


Create sale in SuperOffice

To create a sale in SuperOffice from Outlook, please follow the below steps:

1. Open the e-mail from the person you want to add as a contact.
2. Select **Create sale in SuperOffice** in the Outlook sidebar.
3. Make the appropriate changes to the fields.
5. Select **Save**

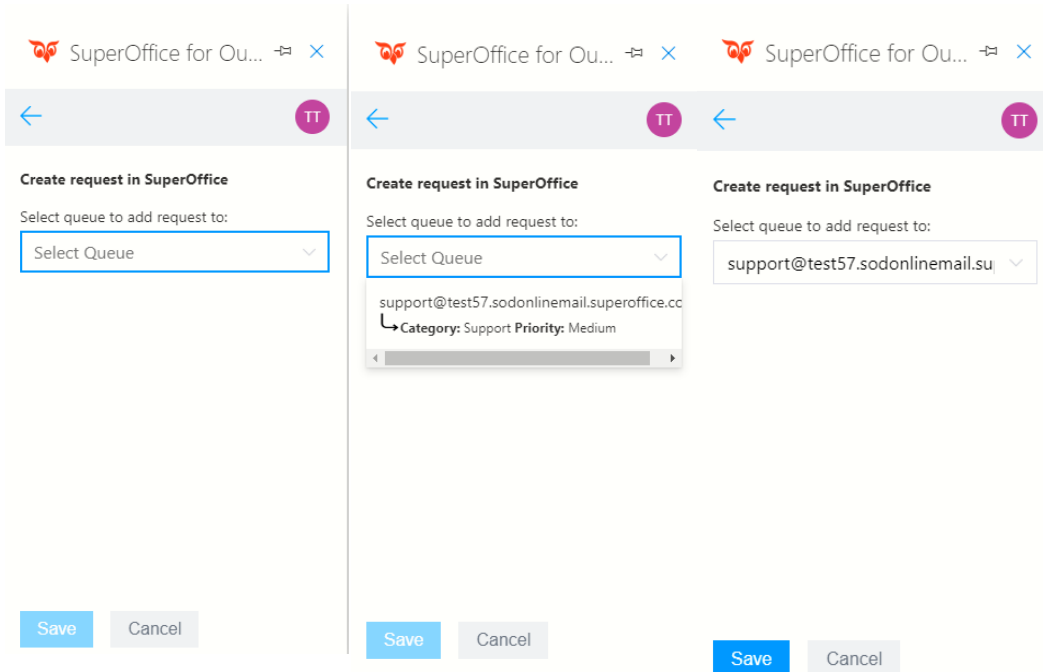
Note: If currency is turned on in SuperOffice this field will be visible in the outlook sidebar.



Create request in SuperOffice

To create a request from a received e-mail, follow these steps:

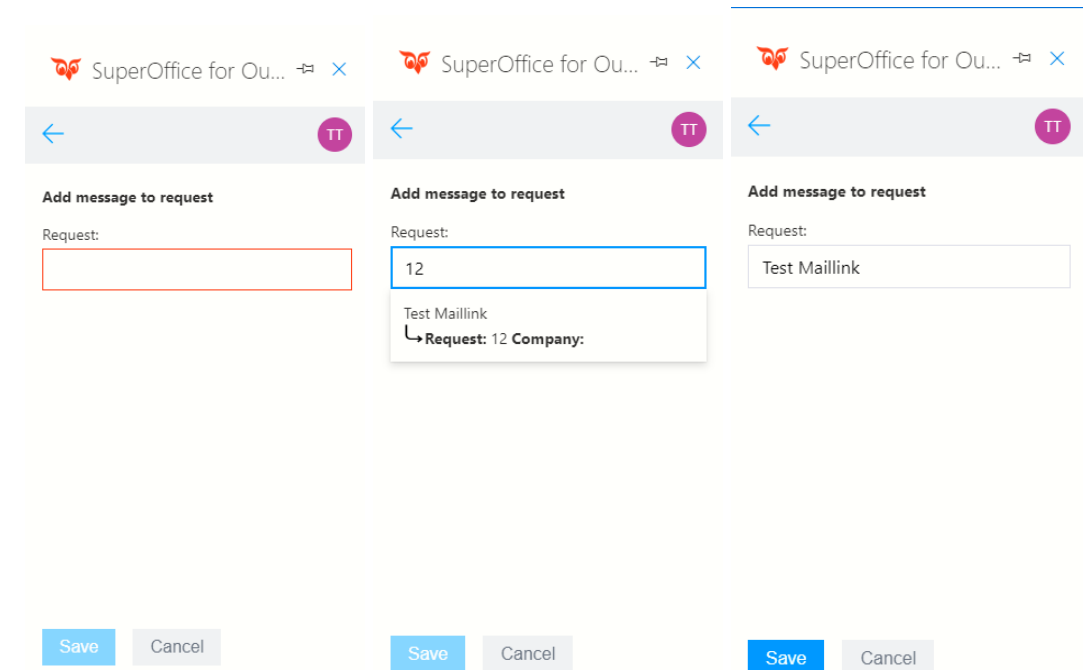
1. Open the e-mail you want to add as a request in SuperOffice.
2. Select **Create request in SuperOffice** from the SuperOffice for Outlook panel.
3. On the Create request in SuperOffice panel, click the **Select queue to add request to** dropdown and select the queue you would like to add the request to.
4. Select **Save** and the request will be saved to SuperOffice and you will be directed to the main page



Add message to request

To add a message to an already existing request please follow these steps:

1. Open the e-mail you want to add as a message to request.
2. Open the SuperOffice for Outlook sidebar and select **Add message to request**.
3. In the page Add message to Request page, in the search field you should be able to search for request ID and request name.
4. Make the appropriate changes to the fields
5. Select **Save**

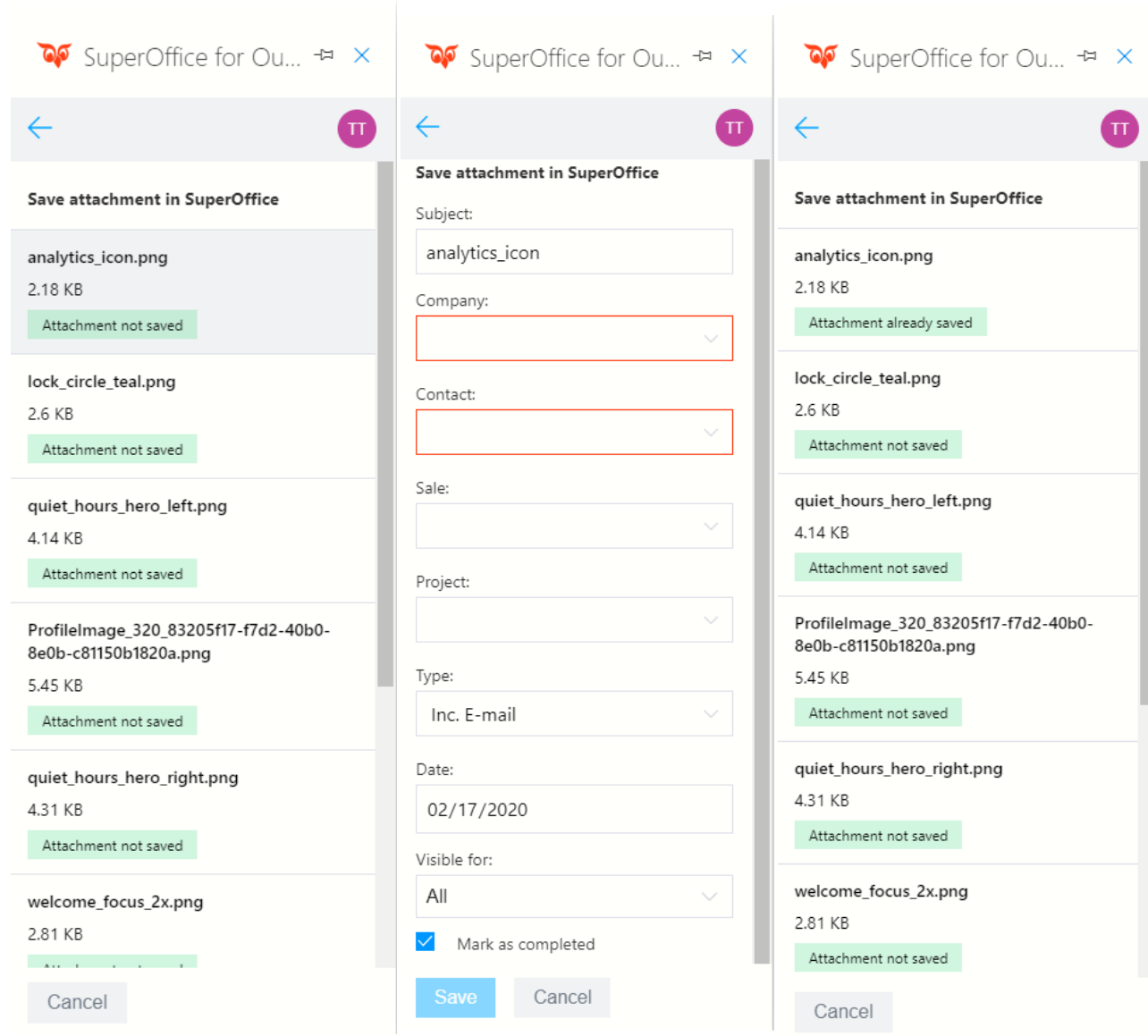


Save attachment in SuperOffice

To save attachments from a received e-mail, follow the below steps:

1. Open the e-mail that has the attachment(s) you want to save to SuperOffice.
2. On the **Save attachment in SuperOffice** page there will be a list of all attachments that are possible to save to SuperOffice.
3. Once you see the attachment you want to save, select it. When the attachment has been selected you will be directed to the next page.
4. Fill out the fields and select **Save**.
5. When you have selected **Save** you will be directed to the main screen. If you would like to save another attachment from the e-mail to SuperOffice, repeat steps 1-4.

Note: When you have selected to Save an attachment and return to the list of attachments to save. Previously saved attachments will be marked as **Attachment already saved**.



The image displays three sequential screenshots of the SuperOffice for Outlook interface, illustrating the process of saving an attachment.

Left Screenshot: Shows the 'Save attachment in SuperOffice' screen with a list of attachments. The first attachment, 'analytics_icon.png' (2.18 KB), is selected. Below the list, there are 'Cancel' and 'Save' buttons.

Middle Screenshot: Shows the 'Save attachment in SuperOffice' form. The 'Subject' field is filled with 'analytics_icon'. The 'Company' and 'Contact' fields are empty and highlighted with a red border. The 'Sale' field is empty. The 'Project' field is empty. The 'Type' field is set to 'Inc. E-mail'. The 'Date' field is set to '02/17/2020'. The 'Visible for' field is set to 'All'. The 'Mark as completed' checkbox is checked. There are 'Save' and 'Cancel' buttons at the bottom.

Right Screenshot: Shows the 'Save attachment in SuperOffice' screen with the same list of attachments. The 'analytics_icon.png' attachment is now marked as 'Attachment already saved'. The 'lock_circle_tea.png' attachment is marked as 'Attachment not saved'. The 'quiet_hours_hero_left.png' attachment is marked as 'Attachment not saved'. The 'ProfileImage_320_83205f17-f7d2-40b0-8e0b-c81150b1820a.png' attachment is marked as 'Attachment not saved'. The 'quiet_hours_hero_right.png' attachment is marked as 'Attachment not saved'. The 'welcome_focus_2x.png' attachment is marked as 'Attachment not saved'. There are 'Cancel' and 'Save' buttons at the bottom.