

SuperOffice CRM 6 Outlook Mail Link

The SuperOffice CRM 6 Outlook Mail Link will add new functions to the Outlook Inbox, making it able to work together with SuperOffice CRM 6 in a very efficient way.

For certain categories of SuperOffice CRM 6 users, the kind of integration this solution offers will provide a very convenient workflow connected to writing, reading and storing of e-mails. By using filtering options, the user may decide, among other things, which e-mails to be stored and deleted. The scenarios below describe the main features and workflow when working with SuperOffice CRM 6 and the Outlook Mail Link.

Storing received e-mails directly from Outlook

From the Outlook Inbox you can select (one or several) e-mails and select "Archive on company/ contact" from the drop-down menu in Outlook Inbox and the mail(s) will automatically be stored and attached to the corresponding company card and contact person. If you are more interested in the attached document than the e-mail itself, you are also able to store the attachment directly as a document in SuperOffice CRM 6. You may also store an e-mail as a task directly in CRM 6.

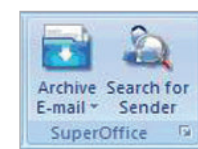
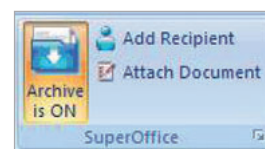
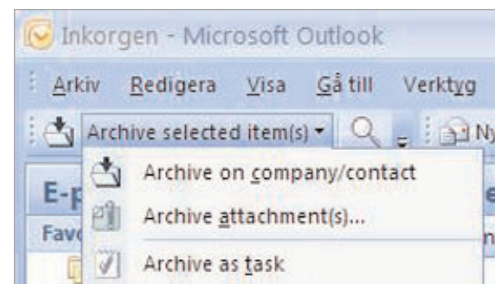
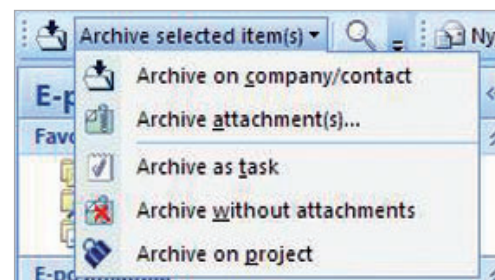
Storing sent e-mails directly from Outlook

When sending e-mails, with or without attachments, you will discover the really seamless integration between SuperOffice CRM 6 and Outlook. When sending e-mails, the Outlook Mail Link provides a direct link to the SuperOffice CRM 6 company and contact person database (where of course all customer email addresses are stored). You simply select new mail in Outlook, select the right contact(s) from the CRM 6 database and send it. The e-mail you have sent will automatically be stored in the CRM 6 database, linked to the company and contact person it was sent to. If you are in a situation where you want to attach documents to your e-mail – e.g. a proposal or contract you have stored in SuperOffice CRM 6 – you simply select the right document(s) to be included in your mail.

You can of course still select contact persons and create new mails directly from CRM 6. The same applies to the functions reply and forward initiated from the SuperOffice CRM 6 activity list. Selecting "e-mail" in the CRM 6 navigator will take you directly to the Outlook Inbox

Using SuperOffice Outlook Mail link with Outlook 2007

If using Outlook 2007 an even tighter integration is used as SuperOffice Ribbons for MS Office 2007 is used. SuperOffice Ribbons is a part of CRM 6. Version 6.1 and forward.



SuperOffice®

SuperOffice CRM 6 Outlook Mail Link is a module for SuperOffice CRM 6 for Windows and is bundled with the server application.

System requirements:

Outlook 2003 or newer.
SuperOffice CRM 6 for Windows version 6.x or newer.
Your PC can run one of the following operating systems; Windows 2000, Windows XP Professional, or Windows Vista.

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