

KONTINEO Excel LCD

for SuperOffice CRM



Implementation Checklist

Technical Preconditions

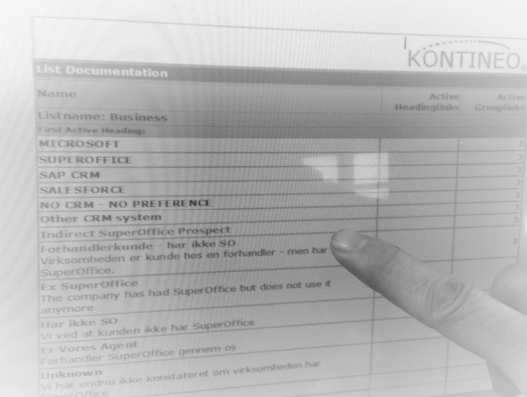
Done	Task	Comment
	SuperOffice central running on SQL Server 2000 or 2005 with SQL Server login	
	Excel LCD Client is running Superoffice 6.1	
	Excel LCD Client is running Windows XP (May run Vista – not recommended)	
	Excel LCD Client is running Office 2003 (Does not support Office 2007)	
	Administrative rights on Excel LCD Client	

Installation and configuration

Done	Task	Comment
	Kontineo 2006 version 5.803.487 or later installed	
	Kontineo 2006 License Activated	
	User Granted User License and Administrative rights in Kontineo 2006	
	Multiple Database Solutions Enabled	
	Excel LCD solution downloaded	
	Excel LCD License Activated	
	Excel LCD Database Solution Published (If applicable)	
	Activate Excel LCD Solution	

SuperOffice Configuration Documentation (Word)

Done	Task	Comment
	Run Job A1	
	Run Job A2	
	Run Job B2	
	Run Job B3	
	Run Job B4	
	Create ZIP File named "[Name] SuperOffice Configuration documentation.zip" containing <ul style="list-style-type: none"> - Field Documentation.doc - List Documentation.doc - User Documentation.doc 	
	Send "[Name] SuperOffice Configuration documentation.zip" by e-mail to the customer.	



Name	Active	Group
Li-Name: Business	Active	Group
First Active: Headings	Headings	Group
MICROSOFT		
SUPEROFFICE		
SAP CRM		
SALESFORCE		
NO CRM - NO PREFERENCE		
Other CRM system		
Indirect SuperOffice Prospect		
Forhandlerkunde - har ikke SO		
Virksomheden er kunde hos en forhandler - men har SuperOffice.		
Ex SuperOffice		
The company has had SuperOffice but does not use it anymore.		
Har ikke SO		
Vi ved at kunden ikke har SuperOffice		
Er Vores Agent		
Forhandler SuperOffice gennem os		
Dokumentation		
Vi har endnu ikke konstateret om virksomheden har SuperOffice.		

Excel Writeback – Add new List Items

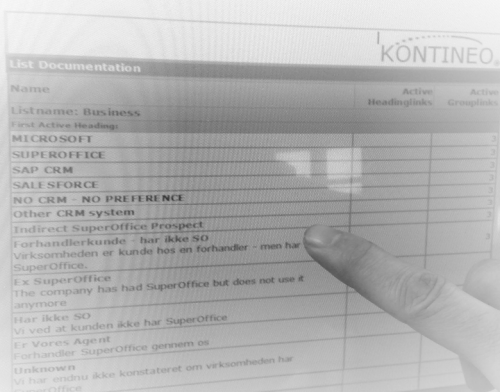
Done	Task	Comment
	Close Excel if open Run Job A1 and A2 to ensure you work with the latest data.	
	Run Job B1 (Open Lists.xls)	
	Unprotect Sheet (if required)	
	<p>Add New List items <i>In the Excel Spreadsheet each list has it's own sheet, except udlist, where all userdefined lists are in one sheet. To add new list items, add them below the last row containing existing list items.</i></p> <p><u>Listname (Column B - udlist sheet only)</u> Listname exactly as it appears in the udlistdefinition sheet.</p> <p><u>First Active Heading (Column C)</u> Is not imported – leave blank</p> <p><u>Name (Column D)</u> List item name Must be unique</p> <p><u>Rank (Column E)</u> Fill down – should be consecutive for all</p> <p><u>Deleted (Column F)</u> 1 = deleted 0 = active</p> <p><u>Tooltip (Column G)</u> Tooltip text for List item</p> <ul style="list-style-type: none"> - Close Excel (Save) - BACKUP SUPEROFFICE before importing - Run Job C1: Import Lists from Excel - Run Job C2: Import lists from Excel (Userdefined) <p>Add additional list item properties in SuperOffice Admin This applies to document templates (Filename etc.), Activity types (Color, etc) and other lists as well.</p> <p>Run Job A1 and A2 again to export with refreshed data.</p>	

Excel Writeback – Edit Existing List Items

Done	Task	Comment
	Close Excel if open Run Job A1 and A2 to ensure you work with the latest data.	
	Run Job B1 (Open Lists.xls)	
	Unprotect Sheet (if required)	
	<p>Edit Existing List items <i>In the Excel Spreadsheet each list has it's own sheet, except uelist, where all userdefined lists are in one sheet.</i></p> <p><u>Listname (Column B - uelist sheet only)</u> Is filled in – don't change</p> <p><u>First Active Heading (Column C)</u> Is not imported – don't change</p> <p><u>Name (Column D)</u> List item name Must be unique – i.e. don't change to list item name that exists</p> <p><u>Rank (Column E)</u> If changed – make sure it is consecutive for all</p> <p><u>Deleted (Column F)</u> 1 = deleted 0 = active</p> <p><u>Tooltip (Column G)</u> Tooltip text for List item</p> <p>- Close Excel</p> <p>- BACKUP SUPEROFFICE before importing</p> <p>- Run Job C1: Import Lists from Excel</p> <p>- Run Job C2: Import lists from Excel (Userdefined)</p> <p>Edit additional list item properties in SuperOffice Admin This applies to document templates (Filename etc.), Activity types (Color, etc) and other lists as well.</p> <p>- Run Job A1 and A2 again to export with refreshed data.</p>	

Excel Writeback – Edit List Heading links

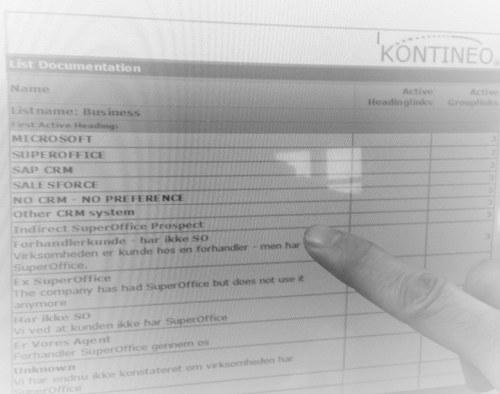
Done	Task	Comment
	<p>Create List Headings and activate "Allow grouping and filtering" in SuperOffice Admin</p> <p><i>You cannot create List Headings in Excel and you must activate "Allow Grouping and Filtering" in SuperOffice Admin. You create the headings in SuperOffice Admin and then you can edit/maintain which items that are linked under which headings in Excel.</i></p> <p><i>You cannot edit/maintain Listheadings for userdefined Lists.</i></p> <p><i>Tip: After SuperOffice 6.1 you have additional List Heading maintenance views in SuperOffice Admin. This replace the functionality of Excel LCD for Listheadings to a large extent.</i></p>	
	<p>Close Excel if open</p> <p>Run Job D1 and D2 to ensure you work with the latest data.</p>	
	<p>Run Job D3 (Open Listheaders.xls)</p>	
	<p><u>Edit Existing List items heading links</u></p> <p><i>In the Excel Spreadsheet each list has it's own sheet. (Userdefined lists headings are not included).</i></p> <p><i>TIP: Use Auto filtering to filter out to get the right overview.</i></p> <p><u>LINKED (Column E)</u></p> <p>This is the Only Field you can edit. Write "X" to link a list item under a heading. Remove the "X" to remove the List item under a heading.</p> <ul style="list-style-type: none"> - Close Excel - BACKUP SUPEROFFICE before importing - Run Job D4: Import Listsheaders - Run Job D1 and D2 again to export with refreshed data. 	



List Documentation		
Name	Active Headings	Active Groupings
Listname: Business		
First Active Headings		
MICROSOFT		
SUPEROFFICE		
SAP CRM		
SALESFORCE		
NO CRM - NO PREFERENCE		
Other CRM system		
Indirect SuperOffice Prospect		
Forhandlerkunde - har ikke SO		
Virksomheden er kunde hos en forhandler - men har SuperOffice.		
Ex SuperOffice		
The company has had SuperOffice but does not use it anymore.		
Har ikke SO		
Vi ved at kunden ikke har SuperOffice		
Er Vores Agent		
Forhandler SuperOffice gennem os		
Dokumentation		
Vi har endnu ikke konstateret om virksomheden har SuperOffice.		

Excel Writeback – Edit Group Links

Done	Task	Comment
	<p>Create User Groups and activate "Allow grouping and filtering" in SuperOffice Admin</p> <p><i>You cannot create User Groups in Excel, and you must activate "Allow Grouping and Filtering" in SuperOffice Admin. You create the headings in SuperOffice Admin and then you can edit/maintain which items that are linked under which headings in Excel.</i></p> <p><i>You cannot edit/maintain Group Links for userdefined Lists.</i></p> <p><i>Tip: After SuperOffice 6.1 you have additional Group Link maintenance views in SuperOffice Admin. This replace the functionality of Excel LCD for Group Links to a large extent.</i></p>	
	<p>Close Excel if open</p> <p>Run Job E1 and E2 to ensure you work with the latest data.</p>	
	<p>Run Job E3 (Open Listgroups.xls)</p>	
	<p><u>Edit Existing List items Group links</u></p> <p><i>In the Excel Spreadsheet each list has it's own sheet. (Userdefined lists Group Links are not included).</i></p> <p><i>TIP: Use Auto filtering to filter out to get the right overview.</i></p> <p><u>LINKED (Column E)</u></p> <p>This is the Only Field you can edit.</p> <p>Write "X" to link a list item to be available for a group.</p> <p>Remove the "X" to remove the List item as available list items for a group.</p> <ul style="list-style-type: none"> - Close Excel - BACKUP SUPEROFFICE before importing - Run Job E4: Import Listgroups - Run Job E1 and E2 again to export with refreshed data. 	



List Documentation		
Name	Active Headings	Active Grouplinks
ListName: Business		
First Active Headings		
MICROSOFT		
SUPEROFFICE		
SAP CRM		
SALESFORCE		
NO CRM - NO PREFERENCE		
Other CRM system		
Indirect SuperOffice Prospect		
Forhandlerkunde - har ikke SO		
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Dokumentation		
Vi har endnu ikke konstateret om virksomheden har SuperOffice.		