

# Sales Cycle Management for Small Business

**7Office Inc.**  
595A Church St #4  
Toronto, Ontario M4Y 2E6 Canada  
416/926-9296 • 7Officequery@7Office.com

7Office is a comprehensive small business workflow solution for managing all interactions with customers — from finding them, qualifying them, selling to them and managing their financials.

7Office runs on your local network and is written in FileMaker Pro.



## ***Feature overview***

### Customer Relationship Management

- daily call reports — who said what to who and what should be done about it
- full word processing for outgoing customer and supplier correspondence
- customer retention mail merge mailings

### Sales Management

- cost estimate and proposal writing
- job profitability analysis
- sales history by item and dollar volume

### Business Management

- invoicing
- purchasing
- inventory control
- accounts receivable/payable
- multiple accounting & sales reports (see below)

### Staff Management

- task management
- timesheets
- sales by sales rep

The 7Office interface is easy for anyone to learn. View a sampling of annotated screenshots at <http://www.7office.com/screensmain.html>

"After doing considerable research on software packages to manage our growing customer database, inventory and sales, we opted to go with 7Office over the other 'standards'. Part of our decision was based on the fact that it could be 'massaged' to meet our specific needs, but more important was the pledge of great customer service and technical support.

"7Office the software, has proved itself, and 7Office the company has surpassed what I would consider unparalleled customer service. An extremely powerful, adaptable and user friendly package. Thanks!"

— *Trevon Baker, **Virtual Backgrounds**, San Marcos, Texas*



"7Office has helped our organization begin the transition from a moribund paperbound operation to more modern warehousing operations. Working with [7Office Inc.] on issues relating to fitting 7Office into our way of doing business has been productive and efficient."

— *Ken Twomey, **Los Angeles Department of Water & Power**,  
Los Angeles, California*



"We have been using 7Office for several years and have been extremely pleased with all aspects of the program and the customer support. From inventory control to invoicing, 7Office has handled all of our needs. We have been able to train non-computer users to use the program quickly and have yet to scratch the surface of what 7Office can do.

"The tech support has always been quick to respond with helpful ideas and changes in the program to suit our needs. This is an absolutely wonderful program"

— *Simon Isberg, **Midwest Chimney**, Lombard, Illinois*



"We had an excellent transition from our inadequate system to 7Office. We're especially delighted with all the hard work you did, prepping our extensive parts list. All of us are quite pleased with 7Office."

— *Bruce Dodds, **All Trans Parts**, Greenville, South Carolina*



"Thank you for your help in restoring 7Office after our recent hardware difficulties. And for the ongoing tips. Your support is well appreciated here."

— *Shelley Dieterich, **Rare Mediums-Well Done**,  
Producers of Good Buddy Notes Stationery, St. Louis, Missouri*

## ***Interaction with Accounting Software***

7Office supports very extensive client financials contained within the program:

- accounts receivable
- credit notes & journal
- sales journal
- sales rep journal
- bank deposits
- retail sales tax collections

We do not recommend duplicating your client information in any other program. Not necessary. Anyone in the office who needs information about a client, including payments, will find everything in context in 7Office.

Continue to use bank account management software such as QuickBooks, MYOB, Simply Accounting, PeachTree, and others. Use 7Office to generate your gross sales and receipts and manually enter these totals. Let each program specialize in its special area of focus — accounting software to reconcile bank accounts, do payroll, generate P&L statements; 7Office to manage anything and everything touching on clients.

In addition, 7Office will export any of its reports in your choice of Excel or FileMaker Pro formats. Choose a report and click "Export" instead of "Print". Coming soon, export your 7Office data in XML format.



## ***Importing data***

Any data you currently have, no matter what its source, can be imported into 7Office. But, because all data is structured and frequently has anomalies, we perform this service for you, so you are assured to a trouble-free migration. Ask for details.



## ***7Office Support***

With programs such as 7Office, your business becomes dependent on their smooth running, always up condition. If and when they go down for any reason, it becomes urgent you receive immediate attention.

Therefore our rates include support costs. You receive unlimited phone and eMail support to talk directly and immediately with a technician who knows the program intimately and will resolve your questions and issues quickly.

During your license you are also entitled to unlimited software updates and upgrades. New features are being added constantly.

## ***Local Support***

Contact us for a 7Office consultant near you. Our network of professional consultants will offer on site consultation pre- and post-purchase with ongoing training and help.

## System Requirements



7Office uses the **FileMaker Pro** database engine from FileMaker Inc. It's FileMaker that gives us a robust foundation that's highly networkable, including to the Internet. FileMaker also enables us to rapidly and flexibly evolve 7Office.

<http://www.filemaker.com>

You will need a licensed copy of FMP 5 or above on each machine accessing 7Office and a copy of FileMaker Server when networking more than three computers.

FMP runs on all current and recent Windows and Macintosh OS's. All other factors being equal, in our experience support costs are dramatically lower and security is higher on Macintosh.



Minimum: Intel-compatible computer, 486/33 or later, brand-name network interface card, 32Mb RAM, Win 95

Recommended: Intel-compatible computer, Pentium 166MHz and up, brand-name network interface card, 128Mb RAM and up, Win 98/NT/2000/XP



FMP 5.5 and above runs native on Mac OS X.

Minimum: iMac, iBook, G3 or G4 computer, 256Mb RAM or better, Mac OS 10.1

Recommended: 512Mb RAM or better



Minimum: Power Macintosh, 32Mb RAM, Mac OS 8.1

Recommended: iMac, G3 or G4 computer, 128Mb RAM or better, Mac OS 9.



**FileMaker Server** runs under Windows 2000, Mac OS X and Linux. We recommend it be the only application running on its machine. FM Server uses TCP/IP protocol and provides all required networking and backup tools.



## Internet Access

In addition to accessing 7Office over your internal LAN, there are two ways for your users to connect into 7Office from any location via the Internet.



**For pricing, delivery or a demonstration contact:**

**7Office Inc.**

595A Church St #4

Toronto, Ontario, M4Y 2E6

Canada

416/926-9296 • [7Officequery@7Office.com](mailto:7Officequery@7Office.com)