

Logical Office Feature List

1. Customer File & Paperless Document Management
2. Automation with WorkFlows
3. Sales & Marketing
4. Time Recording
5. Advanced Database Management
6. SAGE Accounts Real-time Integration
7. Management Information

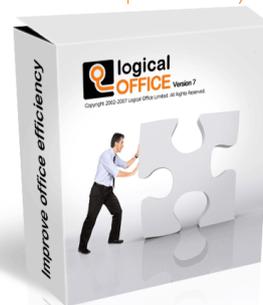


7 ways to boost your company...

This essential feature/benefit list shows you why Logical Office is the **only** choice for busy office workers!

Discover how you can transform your efficiency. Check out our Magnificent 7!

...for
users of
Microsoft:
SQL
Access
Word
Outlook
Exchange
Terminal Server
Excel
XP
Vista
Windows 7
SAGE



CRM for busy people

Logical Office is a registered Trade Mark of Logical Office Limited
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1 With Logical Office's **Customer File & Paperless Document Management** features you get..

electronic customer files

..so you can..

work more efficiently & flexibly



..because you..

can access the file from anywhere - home or office. You can't lose data, documents are safely saved forever, and your colleagues can share a file even if you're working on it

a single view of all customer documents

work more easily & save time



see an instant overview of all customer communication, so you know what was done last, when it was done and who did it. Simply "drill down" to view just one work type instantly

a single view of all customer documents for one work type e.g. projects

work more easily & save time



don't need to hunt through separate directories, simply click on the work type and you'll see only documents for that job - ideal for dealing with projects, renewals etc without searching

file preview view

save time when reviewing the Customer file



flick through the file page by page (just like the old paper file) and you don't need to look in other folders to see emails or scanned documents - they're all in one place. You get an instant overview of what's happening - without searching, and you don't have to open and close each document to view it

comments view of file notes

save time, avoid interrupting colleagues



see your file notes and any comments made by any department for the whole customer file for one or all work types, so you are completely up-to-date and confident when dealing with customers

filtering customer file documents

save time, avoid interrupting colleagues



quickly see just all your own documents, or those of one department, or one contact - within the overall Customer file view or within just one work type e.g. Accounts, so there's no confusion

scanning direct to the customer file

save office space & time



can turn paper into pdf format documents and file them immediately so you won't need so many filing cabinets, you won't search for documents and you can shred and recycle the paper!



✓ handle your customer files faster, easier, without paper from anywhere

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With Logical Office's **Customer File & Paperless Document Management** features

you get..

..so you can..

..because you..

dragging & dropping of documents into & out of customer files

save time, avoid the risk of losing documents



drag & drop files and documents from any windows directory taking a complete copy of the original file into the customer history, where it can't be deleted accidentally

a separate electronic document vault

be confident that documents are safe



deposit any document in the vault and it is encrypted to 256 bit levels - an unbreakable code which means that important documents will never be lost or tampered with

email auto-filing

avoid constantly searching your inbox



see all your incoming and outgoing emails automatically filed in the customer file without any effort, so when you view the file you have the complete history at your fingertips

template-driven letter/email creation

save time & avoid typing errors



create a new letter or email from any standard template within seconds (fully mail merged) ready for you to amend or send - perfect professional output every time in a fraction of the time

conversion of Ms-Word documents to pdf format "on the fly"

save time, avoid buying Adobe



no longer need to convert to pdf using third party products or a pdf printer (which entails re-attaching the converted document) because Logical Office will do it automatically for you

version control of documents

save time, avoid revision errors



create a new version of any document instantly, retaining the old version which is safely held in the customer history. The new document is given a new version number, and automatically filed without requiring you to name it, ready to revise

instant SMS messaging

save time & deliver compelling customer & sales service, avoiding problems & make sure deadlines are met



send SMS messages instantly and keep a record of them in the customer document history. This is ideal for confirming that you have sent an email or letter to a busy customer who works on the move. Show you are proactively using technology to deliver superb service, and maintain deadlines to keep customers happy



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*** create letters, emails, SMS messages faster than you thought possible**

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With Logical Office's **Customer File & Paperless Document Management** features

you get..

..so you can..

..because you..

sales quotations with your own product & service descriptions & prices

save time & avoid typing errors, boost business



produce quotations from pre-set standard quotations (Ms-Word templates), quickly amend prices and quantities and add new services, without having to work out totals or VAT which is done automatically

send complex structured letters from one template using paragraph options

save time & avoid typing errors



take just a minute to select the pre-set variables necessary to produce a professional looking, tailored letter based on variables defined at run time which then "construct" the letter without cutting and pasting

super efficient search engine

save time, deal with customer requests fast



search your database by names, telephone numbers, notes, work type, descriptions, email addresses, post codes using even SQL queries - so no waiting to find data

favourites

save time, access your favourite customers instantly



click on the favourites icon and all your best customers or prospects are listed so no need to search, simply point, click and go to work

the Action List : an instant view of all action required

save time, keep customers happy & make sure you don't miss deadlines



use a personal action list showing you exactly who to call and highlighting any overdue actions so you can't forget. One mouse click puts the customer file on your screen immediately!

CTI (Computer Telephone Integration)

save time & avoid dialing wrong numbers, deliver superior service



you can dial out using a simple mouse click rather than the telephone keypad. See the identity of incoming calls before picking up the receiver.

Note : this requires a chargeable third party product called Smartconnect



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● **find files fast, slash time off your daily workload, deliver world-class service - easily**

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2 With Logical Office's **Automation with WorkFlows** features

you get..

**Logical Worker,
a complete office
assistant**

..so you can..

automate routine jobs to
save time, improve
accuracy, avoid errors

..because you..

implement workflows, which are instructions to perform standard activities like writing mail merged letters, sending emails, sending SMS messages, writing to spreadsheets, updating files - anything a normal office assistant does!

**greater staff
efficiency - no
missed
deadlines**

avoid unhappy customers,
reduce staff problems

see actions created by the Logical Worker in your actions lists automatically, generated from simple commands in the workflows. You can also update the status of work flows from the action list, so automation becomes easy

**complete
flexibility to
change
WorkFlows
easily**

do business more
efficiently the way you
want to

change workflows as your business requirements change and evolve to e.g. sending emails rather than letters, content of emails and letters, and degree of your own user involvement controlled by Action list reminders

easier marketing

generate business with
sustained mail shots -
without manual effort

write or adapt one of our workflows to send a series of automated communications (letter, email, SMS) or generate user actions (tel call, send promotional item) based on a predefined timescale - so marketing is done regularly at the right time every time - effortlessly!

**easier contract
renewal,
membership
subscription, even
invoicing**

reduce manual effort,
ensure accuracy,
bill on time

use workflows to detect renewal dates, alert staff to check renewal amounts and renewal status, send renewal notices to customers, and even raise renewal invoices, convert them to PDF format, and send by personalised email



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**don't be an ass - boost your
efficiency by making the
computer do the donkey work**

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3 With Logical Office's **Sales & Marketing** features

you get..	..so you can..	..because you..
a flexible mail shot program	generate new business, sell extra services & retain customers £££	send targeted personalised letters and emails based on standard templates, to sell services and advise existing customers about news & legislative changes. SMS is also an option
telesales call list generation	achieve higher conversion rates for new business £££	allocate a user, team or department to make calls to targeted contacts as a first approach or follow-up after sending a mail shot. Then it's a simple matter of using the Action list
campaign management	improve sales consistently & look professional instead of amateurish £££	keep campaign history against each contact for greater control and to avoid embarrassing repeat mailings. You can re-run campaigns based on previous interest levels
seminar & promotion management	expand your marketing and boost business £££	invite and track all attendees to seminars and conferences. Send details of the venue or promotion using just one template for all events - a problem for most CRM systems - easy for us
mail shot analysis	see how effective your campaigns are £££	see a breakdown of responses based on your pre-defined response categories, shown graphically for easy recognition and comparison to previous campaigns
Work Flow wizard and custom screen and field builder	create customised automated marketing strategies £££	write a work flow to send a series of emails or letters, plan follow-up calls - so your marketing is sustained and strategic rather than "hit or miss". As a result watch your sales grow
mail box manager	save hours of time, keep your inbox clear £££	see your undeliverable emails magically disappear from your in-box as the contact record is updated with an "undeliverable" category, and the contact email address is moved to notes



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£££ want to expand income, retain Customers, improve profits? No problem.

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4

With Logical Office's **Time Recording** features

you get..

real-time time recording as you work for any work types

..so you can..

bill the correct amounts, avoid lost time on fixed price work

£££

..because you..

save time against the job as soon as you stop the clock. You can pause and start recording against other jobs too. Time recording is set up to suit your own rates and units of charging

time sheet & expenses entry

make sure all your time is billed accurately

£££

enter time & expenses from paper-based records to provide a consistent time recording approach. Data is tracked against each item of work and is available to view as part of the customer file

multiple billing options with part billing, write-offs & supplements

control your charging accurately & efficiently

£££

bills can be adjusted so you can write-off fees, or part-bill depending on your requirements. The system is flexible and allows for all the usual billing requirements of a professional practice

production of bills in Ms-Word with optional posting to SAGE accounts

save time & avoid posting errors - if you use SAGE

£££

create SAGE ledger transactions so no re-keying is necessary. The correct nominal updates are made. Bills are retained in Ms-Word and may be emailed as pdfs attached to template emails

variable time units & fee earner rates, rate-based & fixed price charging

bill the correct rates for the job

£££

billing rates are set up for each fee earner and you can override them at time of entry, being confident that you will be able to charge your time at the correct rate every time

export of billing data to Ms-Excel

analyse your billing performance

£££

can use Ms-Excel to interpret the billing data, create graphical representations of performance, and flexibly analyse the figures over any period of time - without paper reports

integrated view of billed time, unbilled time, written off time & expenses

see the position on current work

£££

simply click on the work type within the customer file and you can see the total time spent to date, and the value of all time and disbursement entries so you are in complete control of the financial position



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£££ time is money : record it, bill it, save it - before it passes you by!

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5

With Logical Office's **Advanced Database Management** features

you get..

..so you can..

..because you..

SQL database integration

save time, avoids typing errors, maintains database integrity

changes you make in your third party database are reflected in Logical Office without manual re-entry of data, saving time and avoiding the use of obsolete or incorrect data

third party address book

save time, keep all customer information in one place, avoid data duplication

keep addresses of third parties (e.g. consultants) linked to customers, so writing standard letters to third parties on behalf of customers becomes easy. The address is held only once

relationship management

save time, avoids mistakes, allows easier navigation

define relationships between contacts, suppliers, events, organisations, and contacts. These relationships can be viewed and you simply mouse click links to navigate through the system

snapshots to portable computers or off-line PCs

visit customers armed with all the information you need

copy customer data to your laptop/portable PC so you can run Logical Office in the "off line" mode to view the files and documents within them, without being connected to the main office database

data export

integrate your system or pass data to other systems

export data direct to Ms-Excel for organisations and contacts, events (work), document history and actions for immediate processing and analysis or sending on to other systems

Link to eCommerce or Web Site with auto-respond & database updating

save time, improve sales & service, reduce reliance on staff

automatically process data entered on web site forms, and create new records with follow up actions, mailing categories and auto-responses by email, letter or SMS. Deliver superior service and sales e.g. auto-respond to Customer or prospect enquiries without manual effort

Advanced Database Management features : continued overleaf



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your Customer data is your most valuable asset - it deserves only the best

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With Logical Office's **Advanced Database Management** features

you get..

..so you can..

..because you..

Logical Screens

save time, have the system you want at low expense, fast



create new screens and fields to hold the data required for your particular type of business or work to flexibly adapt the system to your requirements at high speed and low cost

WorkFlow creation & maintenance

save time, provide customer service the way you want, reduce reliance on staff, reduce programming costs



change the computer system to work the way you work instead of changing your methods, providing a tailored solution with minimal investment. The WorkFlow command builder "Wizard" allows fast changes to WorkFlows to adapt to new requirements quickly and easily

Strategy creation & maintenance

save time, allows service and marketing to be more automated



define custom workflows and screen contents to provide tailored responses e.g. send a series of emails/letters to contacts enquiring about your tax planning service. Strategies can be added to one contact, or to a group within the mail shot program

mailing category organiser

save time, avoids mistakes



review mailing categories for all contacts in one view; delete, or merge obsolete or duplicate categories; see the overall usage; remove unused categories for all contacts in one hit, saving hours of valuable staff time by avoiding manual effort

inter company transfer

save time, avoid confusion



use a separate database (e.g. "Marketing") and when new customers are signed you simply transfer all the organisation, contact and document history across to the new company instantly with no re-keying of data

organisation record merge

save time, keep your data in order



merge two organisations together creating one new organisation with all contacts and documents shuffled together in the correct logical order. Ideal when two records have been added in error or two companies merge

organisation clone

save time, avoid typing mistakes



create a new organisation from an existing one including the options to create custom screens and associated work events



**good data processing
requires efficiency,
security and integrity**

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6

With Logical Office's **SAGE Accounts Real-time Integration** features

you get..

..so you can..

..because you..

real-time access to SAGE data

save time, avoid dealing with bad debtors, improve cash flow, save money on SAGE licences

get fast access to historical invoices; send email statements/invoice advices within seconds; avoid doing business with bad debtors because you see accounts department credit warnings in Logical Office before you provide the service

invoice & credit note creation from Ms-Word templates

save time, avoid calculation errors, have more control over invoice "look & feel", deal with queries fast, reduce stationery costs

create new invoices fast with automatic calculation of totals, based on standard Ms-Word templates so you can use your own fonts/logos/terms etc. SAGE transactions are posted automatically with the correct nominal allocations and VAT codes. SAGE invoicing was never so easy

raise invoices from time recorded with ledger posting to SAGE

save time, avoid errors

generate invoices direct into SAGE retaining a Customer copy in Logical Office as a word document for easy retrieval later. Nominal headings in SAGE are updated in real time

rapid creation & retrieval of SAGE invoices held in Logical Office

save time, deal with account queries instantly

create invoices/credit notes based on pre-defined template content (to bill recurring services) or on manually entered work. Invoices can be retrieved in seconds and sent as pdfs

automated billing of recurring fees based on WorkFlows

save time, improve sales & service, reduce reliance on staff

use Logical Worker to create recurring bills and raise the appropriate Ms-Word invoices, post the transaction to the SAGE ledgers and print the documents ready to send to the customer - all automatically, or with manual override if required

compatibility with all popular small business versions of SAGE

save money, increase your usage of SAGE

use SAGE Line 50 Version 7 onwards, or SAGE MMS, or SAGE Instant Accounts Please note that for Line 50 versions a 2 user SAGE licence is required.



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if you need integrated accounts, then look no further - it's easy

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7 With Logical Office's **Management Information** features

you get..

company-wide diary and resource scheduler

..so you can..

manage resources more easily, book group meetings much faster

..because you..

easily see what's happening in the future for one person or a group, and book meetings for several people with one entry. You can also view actions within the diary

Logical Analyst for on-screen management information & work control

be in control & manage your company better, plan ahead more efficiently, save time

see an overview of all your work and the value of it, including the status of important jobs, without having to collate the information. It's all available in one simple screen which can be sorted, analysed, edited and exported to Ms-Excel

graphical mailing analysis (within mail shot program)

quickly identify marketing opportunities, see business penetration levels

£££

see a graphical analysis of mailing categories for your contacts based on contact mailing categories so you identify areas of opportunity which you can exploit using the integrated mail shot program

instant export of management data into Ms-Excel

quickly identify work trends, monitor staff actions, see how much work is being done

by analysing work done history you can measure the performance of your teams, see how much Customer interaction is taking place, and how much communication exists for all your Customers

Why pay more for several software packages? You need these features!

With Logical Office you get CRM, Document Management, Paperless Office, Time Recording, Database Management, Action Management, Engagement Letters, Sales & Marketing and Accounting WorkFlows - all in one integrated, affordable, easy to use system. Don't delay - time is money!

Call now : 020 7482 7077 or email info@logical-office.com



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**the ultimate CRM for you
AND your Customers!
Affiliate scheme available**

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