

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

### *Document Storage Programs*

The Office Tools Pro document storage system is designed as a component of a very tightly integrated suite of office automation applications that includes time & billing, scheduling, contact management, and more. The document management component can be purchased stand-alone, but based on the pricing model you're better off purchasing the whole package and leveraging whichever of the other functions you can.

#### **Usability — 4 Stars**

For all of the functionality that is bundled into the Office Tools Pro suite, it is surprisingly easy to navigate. They have improved this interface since last year's review. The system provides a single point of entry to the entire suite of applications so you can quickly get to the information you need.

#### **Document Organization — 5 Stars**

The documents are organized by a series of metadata tags (indexes) upon which you can sort. This includes file name, year, project, category, assigned staff and date modified. You can file documents by client or contact. A unique document listing option is to list all documents by client and assigned staff within the client or vice versa; this allows you to see all of the documents that are currently assigned to a specific staff member.

#### **Integration — 4 Stars**

Due to the nature of the Office Tools Pro suite, the integration is strongest within its own suite of applications. No direct integration is available with tax or accounting applications. You will have to upload those files from Windows Explorer into Office Tools Pro or save them from their original application

directly into Office Tools Pro through a “drop folder” from which

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

### **Annotation — 4 Stars**

No proprietary viewer is available, which means annotations are handled at the native application level. However, with the integration to the project management tool, you can assign a note to a file and then assign the document to a staff member.

### **Overall Value — 4 Stars**

It's a little difficult to rate Office Tools Pro against the other solutions reviewed in an apples-to-apples comparison. What Office Tools Pro lacks in terms of integration with other tax and accounting packages, it makes up for in its integrated suite of office automation applications. If you are a sole practitioner or small firm, you may find this to be a compelling solution for your overall practice management. Pricing is \$500 for a single user and \$225 for each additional user. Online and on-site training are available for additional fees. However, technical support is included with the product for no additional charge.

### **2008 Overall Rating: 4 Stars**

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved