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From the Oct. 2008 Review of
Practice Management Systems

Office Tools Pro 2009 has both workstation and server installation options and now supports a SQL database. Designed for small firms, it can be extended to growing firms that desire centralized practice management. It's a full-feature package with an easy-to-navigate interface that should not require a lot of extended support or training costs.

Ease of Use/Flexibility – 5 Stars
Office Tools Pro 2009, building on the familiar interface of previous years, has updated the look without removing the easy "feel" of the dashboard. Rarely can a software package give you [nearly] everything in one screen and keep it well organized. Office Tools Pro provides staff monitoring, contact review and a task-based main window. Users can select from Contacts, Notes, Task lists, Scheduling, Projects, Time Keeping, Billing and Document Management. Contacts are extremely easy to maintain in a single screen. Mouse-over pop-ups help guide the user for field definitions. Firms can define their service types, assign common services to their clients, and print mailing lists and reports based on those services.

Project Management provides simple linking to budgeting, percent complete, tax estimates, and the complete staffing/time-keeping/invoicing workflow. The majority of commonly needed actions are available in the main screen, significantly reducing the need to memorize menu trees or shortcut commands. As a flexible software package, labels for fields can be customized, automated Account Numbering can be defined, and changes to Office Tools Pro contacts can be pushed to an associated QuickBooks file. Numerous options are available for customizing user

interaction with the product, including defining actions the software should

www.cpata.com/your_firm/podcasts/pm.

Scalability/Stability – 4.5 Stars
Simplified for firms that may be small or require high productivity (low administration
overhead), setup time required is minimal. New for the 2009 edition is complete support for a SQL backend, removing past concerns about security and maintenance of MS Access database files. Only on rare occasion after editing will a screen need to be refreshed to see calculated change. Several refresh methods are provided. Stability has not been a noted problem in the past, and the recent modifications for their new interface continue to appear reliable.

Productivity Tools/Features – 4.5 Stars
Going through each of the primary screens, the consolidated view reduces the effect that tools are hidden, nested or difficult to use. The screen is split in half with tasks for maintaining client data and managing projects on top, and staff management showing existing tasks and priorities on the bottom. The staff management feature provides at-a-glance views of the outstanding tasks assigned, the expected hours to complete and scheduling details. Deadlines from projects appear in this screen, which may be useful to see if a staff member is falling behind, or if assignments are not evenly distributed and thus creating a backlog of work going unattended.

In the client and project management data screens, the user can maintain contacts. Financial information can be stored, which has the appearance of tax-related data for the client, their spouse, beneficiaries and associated employer/company. If your firm provides estate planning services, data collected in this application could be useful for mining and seeking new clients or additional services. The Notes section is a simple way to associate notes regarding clients from staff.

Linking from notes to the timecard enters the notes as action text in the timecard

This could be a useful feature for providing meeting instructions to clients, particularly those who are expected to provide documentation or complete tasks prior to their next meeting.

Project Management functions include date monitoring, the assignment of staff, management of timecards, and setting up appointments for the specific purpose of managing and administering projects (called sessions). Session attendees can be captured, and billing rates for the meeting can be set. The Project Delivery feature helps account for the number of copies of reports required for government submission and client receipt, including extensions/drafts. Timesheet entry when not using aforementioned tools is similar to direct database entry in a table view. Invoicing has basic functionality, with support for flat rate invoicing and e-mailing invoices. The vendor offers time card integration for payroll and billing in QuickBooks. The Records Management tool is a record set for storage details (as in what's in the storeroom and where), not an electronic document retention system, though that is provided in the Documents feature. Documents supports a library for the retention of documents in electronic storage and the creation of new documents in Word, Excel, PowerPoint, Word Perfect and Scan Document. Templates are supported for new Word document generation.

Reporting – 5 Stars
Reports are available for schedules, including printable daily, weekly and monthly calendars. A unique feature in Office Tools Pro is the Sign-In Ledger, allowing for a front-desk sign-in or for creating a conference room schedule. Project reporting can be sorted and filtered, with several choices for report type. In addition to internal-use reports, form letters can be generated, which include envelope and label printing. Form letters can be customized or constructed new, and many merge fields are available from project and contact information. Timesheet

reports are available for management review, and are constructed for manual

conference is an opportunity to receive training, and the website provides a knowledgebase with installation assistance. A series of user guides is available online, and a podcast is expected soon. As well, the vendor offers web-based and on-site training. The product is not currently Vista compatible.

Integration – 5 Stars

Office Tools Pro supports integration for data import from QuickBooks and Outlook (for e-mail and contacts). Within the setup options, it is possible to push changes from Office Tools Pro to QuickBooks when modifying contacts and client information. Importing and exporting options are minimal with regard to data held in other practice management packages. Firms with large client listings or existing data in a competing practice management product will need to prepare their data in a common export format and work with North 40 Systems. North 40 can assist with the import of data at an additional cost, and they regularly provide this service. Maps to client offices can be generated from within the application using a MapQuest link. Remote backup services are available with a monthly hosting fee. The Document Manager supports creation of new documents in several common office productivity formats.

Relative Value – 4.5 Stars

A 10-timekeeper firm would pay $2,200 for the Professional version with all features enabled. Additional time-keepers are available for $225 each. Alternative licensing options include the Standard Suite with just three features enabled, or the sole proprietorship. Annual renewal fees are 35 percent of the current license pricing. Office Tools Pro 2009 is an excellent value for firms starting out or for those looking for a product that provides simple interfacing with little training required.

2008 Overall Rating: 4.5 Stars

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