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Office Tools Professional — Practice Management 2012

661-951-9200

www.officetoolspro.com

Best Firm Fit

Office Tools Professional (OTP) Practice Management 2012 is best suited for small and mid-sized firms who want to have a single point of entry to manage all of their client interactions, correspondence and files. This system has been deployed in in firms from 2-80 staff, although the best fit in our view is in firms where engagements are typically managed and completed by a small group.

Strengths:

- The key feature of OTP is the suite of integrated applications; document storage, contact management, billing, project management, scheduling, note tracking and more
- Document and file sharing portal application
- Autosync with Outlook will move inbound emails to the client's folder based on the email address
- Central dashboard for one click access to all applications and information

Potential Limitations:

- No direct integration with tax software

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- Ease of navigation from one application feature to another provides all of a client's practice management information at your fingertips.
- PDF print driver publishes documents directly to the appropriate client's document storage area.
- Direct integration that synchronizes contacts in both directions with Lacerte.
- Can receive document from any tax program.
- One-way synching of contact information from tax programs via Excel.
- Direct integration with the MS Office applications includes the ability to create new files in the Office applications from within OTP and they will be saved directly back in to OTP.
- The integrated time tracking and client billing applications extend the value of OTP well beyond the document storage function.
- Integration with the online portal service lets you transfer a single file or a batch of files directly from OTP into the portal site. From the portal you can email clients a direct link to their documents. You have the option to establish a "branded" portal site representing your firm. Clients can upload files to the portal and an email notification will be sent to your designated staff member.
- OTP will be releasing an update this summer that will support Windows Active Directory. This will allow the document security to be controlled through Windows and will facilitate single sign-on to OTP.
- An additional feature that will be included in the summer release are PDF annotation tools including dynamic stamps that will pick up the engagement status from OTP. In addition, color coded tick mark checks will be provided to associate colors with different staff members.

Summary & Pricing

OTP offers a compelling value proposition with the extended bundle of integrated

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