Office Tools Professional — Practice Management 2012
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From the July 2012 Review of Practice Management systems.

Best Fit: Smaller firms looking to increase work flow efficiency as well as integrate document management capabilities.

Strengths

- Simple, single user interface is easy to understand and follow
- Integrates simple document management structure
- Integration offered for QuickBooks, Outlook and Lacerte

Potential Limitations

- May not meet needs for larger firms
- No cloud presence other than through Client Portal option

Practice Management 2012 is the third generation release from Office Tools Professional. Built on a simple to use single-screen interface, the focus is on quick navigation. Practice Management provides a complete set of customer relationship management tools in addition to time and expense keeping and practice management functions. Practice Management 2012 provides some entry-level document management capabilities as well.

BASIC SYSTEM FUNCTIONS

The Practice Management 2012 interface is focused on a single-screen interface that

may import documents into the system through a formal import process, or users may simply drag the documents onto a particular client or project. The document is then imported into the system and filed appropriately in the underlying folder tree structure. Each document also retains its native file format and may be opened with any third-party program designed to open those file types. Documents imported in to the system may also be forward to clients or other staff members through email processed within Practice Management 2012.

TIME MANAGEMENT CAPABILITIES

Practice Management 2012 provides numerous ways for users to enter time data. The time tab within the user interface allows for direct time entry. On this screen the user is responsible for posting time to the correct client, project and task. Users may also post time as they work on projects. This method allows the user to simply select a client or project and post time to the correct task. An additional method to post time is through the use of timers. Users may run multiple timers at any given time to track time on clients and projects. Regardless of how time is posted, the time tab screen serves as the central storage point for all time posted throughout the system and allows for modifications by the user as necessary.

The project tab within the system interface houses all the projects assigned to each client. By selecting a client, all the particular projects assigned to the user are displayed. Each project assigned to a client may have a customized set of tasks or may be predetermined through a template. Staff assignments associated with the respective tasks may also be customized or assigned through templates. As each task is completed within the project, the succeeding task is automatically selected and forwarded to the staff member as appropriate.

INVOICING FUNCTIONS

Practice Management 2012 process all billing through a dedicated billing tab within

MANAGEMENT FEATURES

Practice Management 2012 provides partners and managers tools to reduce administration resources necessary to track staff and related projects. Partners and managers may view lists of outstanding projects filtered by client and staff. Partners and managers also have the ability to view schedules of staff in a calendar format listing each staff member side-by-side. Each staff member may also access this information, but through assigned access permissions, may be limited only to tasks assigned to them. These tools help provide a snapshot at any given moment of the workload within the office and aid in balancing the workload as necessary. Although no dashboards are currently available Office Tools Professional is currently in the process of implementing this technology and will integrate this feature in a future release.

Multiple reports are provided for billing, contact, staff and project management. All reports are currently static in design and are based on the Crystal Reports platform. Reports may be filtered through a variety options available within each report. A full audit trail is turned on by default and tracks all items throughout the system. Reports may be run to help rebuild time and expense items attached to projects, should an error occur.

INTEGRATION & DATA MANAGEMENT

Practice Management 2012 offers a variety of integration options. Two unique integrations are with Dymo and Google Maps. Single labels can be directly output to any Dymo label printer simply by selecting the client and clicking the Dymo button. Maps and directions are easily obtained through right clicking an address and selecting Get Map. From there, users are automatically directed to Google Maps to obtain directions to and from a client's location. Another native integration includes the newly introduced Practice Management Client Portal product offering, which allows invoice and payment options as well as document sharing with clients. Most

also provides users the ability to keep all client contact information and client calendar appointments on their desktop as well as their smartphone. The Lacerte integration ensures all client contact information is unified between Lacerte and Practice Management 2012. Each of the above mentioned integrations is offered for a nominal fee.

HELP/SUPPORT

Practice Management 2012 offers user guides for each of the features with the system and each is accessible through the drop down help menu. Online resources are available through the Office Tools Professional website, but are currently limited to the user guides and an online knowledgebase. Users may contact support through email, phone or fax and all support is included with the annual licensing fee. Office Tools Professional works directly with new customers to ensure the system is setup correctly to meet needs based on current work flow process. Additional training options are available and include three tiers of online training videos, web consultations and specific subjects and on-site training. All additional training options are available at additional cost and are priced according to training needs. Currently over 450 firms utilize a helpful group resource on LinkedIn.

SUMMARY & PRICING

Office Tools Professional Practice Management 2012 offers users a simple, single-screen interface and offers direct access to client information, billing and document management. Practice Management 2012 is flexible and can be tailored to meet accounting practitioner needs, regardless of complexity. Practice Management 2012 can be implemented by firms of all sizes, but is intended for smaller accounting practices. Firms with 100 or more employees may require additional features not currently offered, while sole practitioners may not fully benefit from all of the features. Pricing starts at $500 for a single user and tiered pricing is available for 5 or more users and starts at $1,500. The productivity sync modules are priced at $250