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as telephone messaging, contact manager, work order scheduling and job costing. Total Office Manager costs \$8,999 for the basic five-user license. For those who are looking for a client/server configuration, a SQL Server version is also available.

### **Learning Curve ‘ 4.5 Stars**

Installation is an easy wizard-based interface with very few options other than the installation location. After installing, you simply enter the serial number provided, and you're ready to go. A sample company provided gives you a place to evaluate or train before starting a new company with live data. Total Office Manager has some fairly hefty hardware requirements: Windows 2000 or XP, a Pentium 733 processor, 512MB of RAM, and a monitor with at least 1024×768 resolution. The main screen consists of a standard Windows drop-down menu system that is organized by module. By default, an information center docked on the left side shows various information, including pending appointments and messages. An icon toolbar provides quick access to items such as phone messages, customers, invoices, vendors, inventory items, employees, work orders and scheduling board. If you click on an icon, you start automatically in 'add mode.' For example, clicking on the customer icon opens the detail customer screen to add a new customer. A drop-down list for each toolbar icon also lets you access a picklist of applicable items for searching.

Data-entry screens are well-organized and easy to use. Each screen uses a multiple-tab design to separate information into various categories for easy access and organization. Drop-down lists are provided wherever the information in a record is linked to another list. Buttons are also available right on the data-entry screen to add related items on the fly, such as job types, terms info, sales tax codes and so forth. Buttons on the data-entry screen provide one-click access to related lists. For example, on the customer data-entry screen are buttons for Notes, Contact Log, Customer Info, Work Order and Service Agreement. A few user interface quirks need to be worked out. For example, on a number of the data-entry screens, the tab key

moves to fields in random order. I also found other places where the screen controls

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configuration, so the practical limit for the number of simultaneous users would be fairly low. Since Total Office Manager is designed for the service industry, its strongest features relate to scheduling, call management, work order management, and contact management, rather than job costing. The work order module lets you enter information about service calls as they come into the service center. Information such as customer, work order type, priority, assigned technician, scheduled time, and job location can be entered. If you have Microsoft MapPoint installed, you can even create maps and get directions from your home base to jobs or from job to job.

The Schedule Board is a tool used to display and schedule work orders and appointments. This screen presents a configurable grid with columns for each employee/technician and rows for time slots. The grid can be filtered by employee, work order status or work order type. Work orders that have been entered but not yet scheduled display in a list on the left-hand side. Work orders are scheduled, rescheduled and unscheduled by simply dragging and dropping the work order from the list onto the scheduling board for the desired employee and time or by moving it to a different employee or time slot. Appointments and phone messages can also be entered into the system. Appointments are used for quickly scheduling designated times to do something or meet someone at a particular time and place. You can set reminders and alarms to keep track of pending appointments. Similarly, phone messages are used to take incoming phone messages for company employees. The program's message center can route these to the appropriate employee so that when they log into the program, they show up in the user's message list.

### **Import/Export/Integration ' 4 Stars**

The program provides both a data export and a data import wizard. Imports are provided for chart of accounts, customers, vendors and employees, and can be imported from ASCII files. Similarly, exports are provided for chart of accounts,

customers/jobs, vendors and employees, also into ASCII files. As a separate service,

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technical support incidents for up to three designated company employees. The VIP Plan includes unlimited toll-free technical support incidents, with access to the company's senior accountants and programmers. Training sessions are available either onsite or at the company's facilities near Kansas City, Kansas.

### **Reporting ‘ 4 Stars**

The program offers more than 50 reports, each with various sorting and filtering options. Reports can be previewed, printed or exported in a variety of formats including text, \*.PDF, Microsoft Word and Microsoft Excel. Reports also provide a very nice drill-down capability. By simply double-clicking on a number within a report, another report window opens and shows a list of detail items that make up the number.

### **Relative Value ‘ 4 Stars**

Total Office Manager is a nice package that will be attractive to small service-based businesses. However, with a SQL Server version also available, Total Office Manager is scalable to larger service-based businesses as well. If an all-inclusive program with extended features such as work scheduling and call management is important to you, then this package may just suit your needs.

### **2005 Overall Rating: 4**

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