

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

Office Tools Professional — Office Tools Pro 2009

888-667-8440 www.officetoolspro.com

Nov. 01, 2008

From the [Nov. 2008 Review of Time & Billing Systems](#)

Office Tools Pro has a newly redesigned interface that lets you go anywhere in the program from its simple “One-Click” homepage. You can know instantly what’s going on with your client, what projects are being done for them and what documents are associated with them. You can even see the last time they were called or e-mailed. Office Tools Pro is much more than a time and billing system; it’s like a mini office manager on one page. For 2009, the program moved to a SQL database backend, and according to the people at Office Tools Pro the program is now much more stable and has increased in speed. Also new for 2009 is a set of graphics that is really appealing and easy to understand, making the program’s graphical presentation look much better than prior versions.

The program can be a stand-alone program or implemented on your network in a multi-user environment. The Professional Suite single-user license is \$500, and a five-user package is \$1,400. Each additional user is \$225. As I began to review this program, I first loaded it on my Windows Vista laptop, but I quickly realized that the program does not yet function on Vista. It is scheduled to be available for Vista by mid 2009.

Ease of Use & Navigation Features – 5 Stars

Office Tools Pro essentially puts everything on one screen, which simplifies navigation. It may sound like the main page is cluttered by the design, but it doesn't feel cluttered at all. You have a Client Screen on the top half of the page, and as you advance across the tabs along the top of the Client Screen you get different views without ever leaving the main page. The bottom half of the page is the activity listing, which outlines all of the tasks, projects, phone calls, etc. that need to be done for all clients. If there are items past due, alerts at the top of the page will notify you to those items.

Tracking time is a breeze. An active timesheet, when clicked, replaces the Client Screen and allows you to track time after the fact or in real-time. A dispatch function allows you to quickly alert another staff person in the office of a potentially urgent need. The other component I really liked was the document management system. It allows you to organize all of the associated documents, e-mails, PDFs, spreadsheets and all kinds of other documents by client for easy access.

A

Practitioner Says:

“Our Davenport, Iowa firm is very traditional in its approach and direction, with a focus on individual income tax returns.

We prepare slightly more than 2,000 Form 1040s and 300 Form 1065s, 1120s

and 1041s. Our write-up portion of the practice accounts for approximately

35 percent of our gross revenues. Additionally, we offer financial products

and IRS controversy services. We have 10 full-time employees that grows

to a staff of 15 during filing season. It's a family firm that was

started by my father in 1968, and I've been with the firm on a full-time

basis since 1975. Office Tools Pro has integrated many of the functions

of our office into a seamless workflow. This relieves

our staff from having to deal with many of the procedural workflow issues they have had to struggle with in the past. We chose this product because the structure of the product was tight enough that maintenance was a limited concern but open enough that the product could be adapted to our needs. While there is an indication from Office Tools Pro that this product can be implemented without training, I believe doing so would be a SERIOUS mistake. Many of the features of the program can be discovered through time and could be overcome, but training cost is substantially less than the lost time in stumbling through product implementation. Time is the only asset we have to sell. Our firm constantly struggles with the issue of time keeping and capturing that time, i.e. the cost of accounting for that time versus what is the value of the time accounted for.”

Management Functions – 5 Stars

Everything you need to know is at your fingertips. That was my experience with the main page of Office Tools Pro. You can manage your staff’s time and expense entries with a couple of clicks. You can also manage their activity list with the same number of keystrokes. The ability to see, at a glance, the activities by client that need to be accomplished is a valuable management tool. With the program’s Outlook integration, e-mails are stored in the document management section of the client screen.

We all have that file structure on our server where we store Word and Excel documents and PDF files for our clients. Office Tools Pro automatically organizes that into a file structure that integrates with the document storage section of the main page. Putting documents in the client document management sections

is as easy as dragging and dropping them. And its Microsoft Office integration allows you to print directly to the document management folder.

Appointment scheduling, which is again on the main page, can be done in daily, weekly or monthly views. From these appointments, tasks can be scheduled and assigned to staff, and these assignments then show up on the assigned staff's main page in their activity list.

Billing & Reporting – 5 Stars

The billing and reporting functions are also accessed from the main page. A good number of standard reports are available, including those for unbilled WIP, Accounts Receivable, Billing by Staff and by Client, plus many more. I'd say the reporting options are more than adequate. When you get ready to bill, sorting unbilled time into different views is very easy and simplifies the billing process. You can edit invoices on the fly. Once you are in an invoice, you can include more or less detail on the invoice by clicking a couple of options as you go. Invoice templates and client letters are available, all of which can be customized to meet your needs.

Integration – 4.5 Stars

Integration is limited to Quick-Books and Microsoft Office products. Depending on your work environment, this can be a limitation or no limitation at all. Outlook integration means you can manually synchronize the contact list, schedule, call list, to do list and e-mail with Office Tools Pro. As previously mentioned, integration with Microsoft Office products includes the ability to print and store directly into the document management section of the program. For remote time or data entry, most firms log into their server where the program is housed via Terminal Server. This process works fine, but it is not the same as remote time and expense entry.

User Support & Help – 5 Stars

The user-friendly interface includes descriptions for each of the fields and icons, and context-sensitive Help is also provided. Technical phone support is included with the purchase of the program. The product carries an annual maintenance fee of 35 percent of the cost of the product. This fee provides you with product updates and continued phone support at no additional cost. The vendor's website has a knowledgebase, tips and training options, and other technical assistance. As I was working to get my Vista machine functioning,

I turned to technical support. The support department connected to my laptop via www.gotomypc.com and quickly identified the problem.

2008 Overall Rating:

OfficeTools • Article

CPAPA 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.

© 2023 Firmworks, LLC. All rights reserved