Accounting Software

Office Tools Pro 2005 is a complete office management suite, offering document management, calendaring/scheduling, project tracking and contact tracking. This package is best suited for accounting firms and law firms with less than 20 active timekeepers. Steven L. Jager, CPA (www.cre8ivcpa.com), heads a Sherman Oaks, California-based full-service accountancy firm with a special emphasis in tax controversies and accountancy services to individuals and closely held businesses. He says the product's functionality and performance as well as the knowledge of the vendor about its customers' needs are what drove him to select Office Tools Pro. "To have, in one single program, the ability to manage and track client data, correspondence, billings and to-dos is an awesome timesaver." Jager also warns prospective users to be prepared for a steeper learning curve than might be expected: "It takes time to learn how to use the program well."

Ease of Use/Flexibility — 3.5 Stars
Office Tools Pro 2005 is a module-based (or "Feature" based, as the brochure states) software package. Firms have the option of purchasing features for contact management, scheduling, time and billing, records management, document management, and project management. Smaller firms would greatly benefit from the all-in-one nature. The product is based on MS Access database tools, therefore causing some rigidity to layout capabilities. However, a clean interface is readily available, showing contact lookup, available program features and an "Activity List" for the currently selected user. This approach is very useful, especially for users who are regular phone users. In the same screen, they can update information about a contact on the phone, enter notes about

the call and record upcoming activities. Certain input and review panels may

of our prototype firm outlined on page 8, this would be a very comfortable product. A new SQL version has a planned release for fall 2005, which will allow for greater numbers of projects, clients and timekeepers.

Scalability/Stability — 3.5 Stars
Most small firms find themselves in need of a package to track their clients, projects, schedules and billing. The integrated nature of Office Tools Pro makes for a great product — no need for extra spreadsheets, home-grown databases or large monetary investments in what will be under-utilized software. In its present form, the software works best for smaller firms experiencing moderate growth, though that may change with the upcoming release of their newest edition.

Each toolset has the ability to work relatively independently, giving firms the opportunity to get comfortable with one before moving on to another. This makes the setup time less of a major commitment — an important consideration for sole practitioners. Unfortunately, the software can perform in unexpected ways, like giving out macro errors. However, a quick call to customer service allows the user to report the error, and a patch should be made available within a two- to four-week time period; sooner if possible.

Productivity Tools/Features — 5 Stars
Office Tools Pro customers can choose from the following features: contact management,
scheduling, time and billing, project or case/matter, records management, and document tools. Remote timekeeping is offered, though online use is not. Offsite timekeepers must export their timecards and send a database file back to the main office for importing.

Of the features available, perhaps the most useful combination is the document management and the records management set. Records management provides an

interface

the ability to review other users' lists. Although no calendar integration is offered with Outlook or Exchange, the reports that can be generated and the ability to record activities as time entries provides the necessary tools to be productive with an easy-to-use interface. The notes section also works quite well for recording comments regarding particular companies, and notes can also be synched with Palm Pilots. A complete Call Messaging and Tracking system is provided with pop-up reminders for callbacks, time entry for clocked calls, and note taking with a separate section for results/follow-up.

Reporting — 4.5 Stars

Few reports are provided without the ability to customize; nearly all require some sort of selection regarding detail level, sorting and filters. With the wide variety of filters provided, firms should be able to obtain the information they require to do complete billing analysis, employee productivity and profitability of clients. New custom reports are possible with extensive knowledge of Access Programming, though it would be best to request custom programming. This capability is not included directly in the program.

Support/Help/Updates — 5 Stars

Office Tools Pro has seen regular updates for several years, and the company continues to provide innovative tools and features to its users. Phone support is ready and willing to assist, and future updates and upgrade ideas are always welcome. Jager says his experience with the company's technical support is usually good. "They try very hard to answer questions and to accommodate special requests/needs." Upcoming features include a new SQL version and online updates, and the patch cycle provides monthly updates as necessary. Extensive

documentation can be found at the company's web site, and a knowledgebase

Small firms of between five and 15 timekeepers will find Office Tools Pro an appropriate fit, and sole practitioners should also consider this product. The ease of setup and functionality provided best fit those companies that cannot spend considerable time in the setup and training process. For firms looking to add hard and soft copy document management at an affordable price, Office Tools Pro might be the answer. Office Tools Pro can be purchased with all the features listed in a 10-user package for $1,700 (includes upgrades, support and training for one year); sole practitioners can purchase the professional suite for $300. The annual renewal license is 35 percent of the current license price. Companies switch-ing from competitive products may be eligible for discounts.

2005 Overall Rating — 4 Stars