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the Nov. 2006 Review of Time & Billing Systems

Office

Tools Pro offers a time and billing suite that borders on practice management, providing a fairly comprehensive collection of tools for time and expense management, billing, calendaring/scheduling, contact management, due-date reporting, project tracking and paperless document management. A complete one-user package that can support unlimited staff and timekeepers (only one person logged in at a time) starts at \$500 for a single user, with additional users costing \$75. Multi-user packages are also available, as are trimmed down versions that start as low as \$200 for a sole proprietor package. One year of support and updates is included in the pricing.

Ease of Use/Navigation Features — 4 Stars

Office Tools Pro uses a crisp interface that immediately opens to a tabbed screen that is focused on contact management instead of to a centralized dashboard. Because the system is centered around the contact management function, other tasks, such as entering or accessing timesheets, invoices, documents or other data, are generally accessed through the client that is involved. From this screen, users have multiple methods of searching for a client, including pull-down lists by company name or account number and query fields.

The tabbed interface generally provides intuitive navigation, providing a centralized location for logging in client calls, entering notes and action/follow-up items, entering timesheets, and accessing client billing functions. It is further enhanced by a user-specific Activity List at the bottom of the screen that acts as a To-Do calendar for the current user. This list can be filtered to include action items, calls, schedule items, projects, statuses and the user's

hot list. Client contact information is always present at the top of the screen

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view. The program also makes it easy to access calendaring functions directly from any client view or timesheet, enabling the user to quickly add or view client appointments. The system's Call Messaging and Tracking function includes callback reminders that pop up on the user's desktop, and provide automated time entry for clocked calls with the ability to take notes and mark items for follow-up.

John Scott, principal of Scott Tax Associates, Inc. (www.Scotttax.com) in Garden Grove, California, has used Office Tools Pro for just a few years, but definitely sees the financial benefit it has given his firm. "Although I know it is a powerful program with many features, I use it primarily for contact management and billing," he said. "We have five workstations in our office, and Office Tools Pro has made communications between workstations something very simple. In the past, each day my desk would fill up with slips of paper messages (telephone and others) that were walked into my office. This program has eliminated this mess and made us efficient and communicative without the cost of work interruptions."

Management Functions — 3.5 Stars

Office Tools Pro can support any number of clients, projects and staff, with the ability to assign multiple rates to staff and bill based on time or a flat rate, including expenses and markups. The program offers good project management capabilities, maintaining complete project histories in the system's status log. The program also offers records and document management. Records management

focuses on paper-based storage, providing a reliable utility for managing these items. The document management system is focused on paperless electronic filing, with support for *.PDF, word processing documents, Excel files, images, scanned documents, e-mail, invoices and various other file types. The system's

calendaring/scheduling feature allows management of appointments for multiple

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multiple invoice types that can include notes and explanations and allow rates and totals to be edited, marked up or written off as needed. Billing statements are easily created and accessed from the Billing tab and include customizable phrasing.

Integration — 4 Stars

Office Tools Pro can share data with Outlook for contact management, and its document management system can manage virtually any type of file format.

Additionally,

the system has data integration capabilities with 2004 and later versions of QuickBooks, enabling direct transfer of invoices, receivables, company data and other financial information. The program's e-mail functionality does not require Outlook and can manage individual and batch e-mail distribution. The system can be used with Palm-based PDAs.

User Support & Help — 5 Stars

Office Tools Pro has excellent pop-over field descriptions that greatly increase the friendliness of the system, and the program is generally very easy to navigate and work in. The built-in Help utility is standard, and the company offers user guides, tutorials, training, "helpful tips" and a knowledgebase on its online support center. As noted earlier, pricing includes one year of support and system updates. The company also has more formal training options available.

2006 Overall Rating: 4 Stars

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