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## Office Tools Pro — Office Tools Pro 2007

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*From the Nov. 2007 [Review of Time & Billing Systems](#)*

Office Tools Pro provides accountants and other time-centric service professionals with time and expense tracking and invoicing tools, along with other features designed to enhance practice efficiency. In addition to the time, expense and invoicing functions, the program includes integrated AR, due-date tracking, phone call tracking, to-do lists, customizable reporting, project management, paperless records storage, scheduling, contact management and firm productivity tools. This all-in-one approach to firm productivity provides a strong suite of integrated applications for professional accounting firms. The program can be used as a stand-alone program or implemented across networked office environments.

The full version of Office Tools Pro is priced at \$550 for a single user and \$1,250 for a five-user license. A sole proprietor package, with support for only one timed employee, costs \$350. Lite versions of the program are also available.

### **Ease of Use/Navigation Features — 4.5 Stars**

Office Tools Pro uses an interface that centers on contact management functions, offering quick access to client selection lists and data, as well as client invoices, AR and aging, communications, and detailed histories. Toolbars and traditional pull-down menus also offer access to the program's key features. Office Tools Pro's primary client selection list provides many search

and filter options, while client data screens offer tabbed access to information categories and allow creation of projects, appointments, entering phone calls, adding notes, generating invoices, viewing histories, or quickly accessing the program's time entry sheets. The system also allows for customized data fields. While within a client's records, contact information is kept on-screen in the Contact Frame, while a user-specific Activity List at the bottom of the window shows due dates, to-dos, phone calls, messages, ongoing tasks and other items. The default "Staff View" screen provides a single screen where staff can key unlimited time cards into a datasheet for any and all clients.

Office Tools Pro offers calendar time entry sheets and timers. The calendar sheets allow staff to easily convert completed appointments into billable time or to enter data using selection lists. The time data-entry screens also include fields and selection lists for applying expenses and mileage to clients, as well as adding notes or attaching documents to client records. Multiple timers can be opened simultaneously, and, since they are accessed from within a client's files, when using one, a time entry is automatically posted to the client. This then allows the user to note tasks, project and work descriptions and, if an authorized user, to set billable or non-billable amounts. Call and messaging features help track time used for client communications and include reminders, notes and follow-up features.

### **Management Functions — 4.5 Stars**

Office Tools Pro includes great contact management features that keep client data quickly accessible, while maintaining contact data at the top of the screen regardless of what the current task is. The program makes it easy to set clients as prospects or to track vendors and other entities. It also simplifies adding and storing documents with client files, the addition of comments and notes that can be included or omitted from invoicing, offers phone call management, and provides customizable client letters and templates. The program also enables the tracking of user-defined information through the addition of customized data fields.

Office Tools Pro can bill either flat-rate or time-based, and can be used to manage time for any number of staff. The program supports multiple rates per staff member, multiple rates per project or tasks, and includes expense tracking options with the ability for review management to apply mark-ups or mark-downs, as necessary. An audit trail-like feature tracks all project and client histories.

Office Tools Pro also offers strong appointment scheduling functions that allow creation of timesheets from events and copying of events. It also tracks reminders and to-do items, and offers daily, weekly and monthly views. An integrated appointment confirmation system can generate customized letters and reminder calls to clients. The program's document management capabilities enable the firm to store, manage and access files electronically, including Excel, PDF and Word files; images; and e-mails. Office Tools Pro offers synching with PDAs for remote entry of data and contact management.

### **Billing & Reporting — 5 Stars**

The program's invoicing options are easily accessible from within client files, with total customization options and detailed, drilldown functions. The program houses more than 200 reports, invoice templates and client letters, all of which can be customized. Report options include WIPs; AR and aging; various financials; YTD hours; and client, staff and task productivity reports.

### **Integration — 4.5 Stars**

Office Tools Pro integrates with QuickBooks for sharing of client data, banking information, invoices and receivables, and can import from other programs that can export into common text file formats. The system utilizes Microsoft Word and Excel for reporting customization options and can output data into these formats plus Access and PDF. Further integration with Outlook is included for contact management functions. Remote data entry to Palm-based PDAs can be synched back into the system.

### **User Support & Help — 4.5 Stars**

Office Tools Pro sports a very user-friendly interface that includes descriptions for each of the fields and icons, as well as right-click menus and content-sensitive Help features. The company offers print and electronic user manuals, as well as an online support center that includes access to a knowledgebase, tips, training options and technical assistance. Phone support and product updates are included for one year with program pricing.

**2007 Overall Rating: 4.5 Stars**

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