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Dec. 01, 2008

From the October 2006 Issue

Last year's submissions for the practice management review were wide and varied. A couple of products were receiving final touches to major updates, while a few others had obviously been neglected by their owners for several years. The majority of products, however, could be heard screaming for attention — there was a drought of inspiration in the software world. I'm happy to report that the plain of software production is showing signs of rain and fertility. Many products have seen accelerated growth since last year's reviews.

While there are likely to be several contributing factors to this growth, the best explanation I can think of is user response. This year's entries have added integration to new products such as Microsoft Small Business Accounting, improved document management techniques, and utilized better designs for Internet-based record-keeping. Better thought has been given to layout, and it appears that many developers have taken user responses seriously and developed their products to those specifications.

Because our firm recently upgraded to a new practice management platform, I'd like to provide a task list of sorts for you, as a potential user, to do beyond reading the reviews. If you already make use of some software package, a needs-analysis will not be enough. It is very important that you identify characteristics of your current software that you like; the new software will

already have plenty of “new features” that your users won’t

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and from case the vendor decides to stop supporting your software implementation.

Hopefully, this checklist will get you and your firm started on your quest for a new practice management package. Feel free to add to the list as needed. If you or the vendor can’t pass this test, you’re not ready to purchase.

- We have identified the five (or 10) most important reports necessary for our practice.
- Our current user frustrations will be addressed by [this software package] through the following functionality: (make list).
- We do/do not need Internet or remote connectivity to our package.
- Our time zone corresponds well with the support hours of the vendor.
- The vendor provided a demo of the software we plan to purchase, not one with extended functionality enabled.
- My boss did not get vague promises and answers from a vendor salesperson.
- Timekeeping really is easy in this package based on our organization system.
- There is a strong chance I can train all of our users to use this package the way we intend for them to use it.

Caseware — CaseWare Time and Today 2006

CaseWare Time and Today 2006 offers accounting firms a thorough practice management software package. Intended for midsize firms, this product is best implemented by...

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Practice Engine Version 7.0 is now available for the U.S. market. Well suited for medium and large firms, this web-based product is tailored to the needs of each customer.

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[Review](#)

[LexisNexis — TimeMatters with Billing Matters](#)

Time Matters with Billing Matters Plus 7 from LexisNexis encases the entire business process, with timekeeping, customer relations, billings, employee scheduling, project management, communications, research tools and document management.

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[Office Tools Pro — Office Tools Pro](#)

Office Tools Pro 2006 is a versatile office management suite with a target audience of tax and accounting firms and law firms with fewer than 20 active timekeepers. Offering document management, calendaring/scheduling, project tracking, time and billing, and contact tracking, this product packs a lot of features into an organized and affordable package.

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[Shift Technologies, Inc. — Timesheet Reporting By ThinMind](#)

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Practice CS, Version 2006.1.0 from Creative Solutions marks the second edition of its new environment and one component of a very large suite of integrated accounting and client service products. This product can easily be implemented for a small firm, but medium to large firms (upwards of 30 to 100 timekeepers) will make greater use of the suite approach and capabilities.

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[Programs 2006 — Executive Summary](#)

This year's showing of practice management products provides a glimpse of the software-as-a-service market and next-generation full-suite approach that will soon empower firms large and small. The ability to work on an anytime, anywhere basis is going to dominate the growth patterns of midsize firms and highly successful small firms.

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