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Accounting Systems

Total
Office Manager is a comprehensive, high-end contractor accounting package, specializing
in support for service industry businesses such as telecom, electrical, HVAC, plumbing, appliance repair and other such contractors. The system includes traditional
GL, AP and AR, along with advanced CRM, payroll with direct deposit, vacation and benefits tracking, scheduling, serialized inventory, and enterprise-level accounting, along with contractor-specific modules for service agreement tracking, work order generation, flat rate pricing, customer equipment management, service and installation histories, and vehicle tracking options. The full Total Office Manager suite, with all capabilities, costs about $10,000, but other lower-cost options are available as pricing is based on modules and support packages selected.

Learning Curve/ Ease of Use:
Total Office Manager includes a wizard that guides users through initial setup tasks, then opens to a Workflow Navigator screen for company, customers, banking, employees and vendors, with each providing intuitive icons for quickly jumping to key tasks within that category. The Company Workflow screen, for instance, offers access to departments, the chart of accounts, assets, financial reporting and analyses, and the audit trail. The Employee Workflow screen includes managing and entering timesheets, processing payroll, printing checks and processing direct deposit, and paying liabilities.

These Workflow screens also offer access to related lists, such as assets,

for various tasks, with the screens offering advanced entry functions, including smart lists, calendars and selection fields, with data automatically flowing to appropriate accounts and other areas of the program. Selection lists for employees, customers, vendors and other items provide excellent sorting and filtering options, as well as lists and forms for about 450 categories, ranging from payroll and banking items to employee types, work orders and multi-location inventory.

Key Modules & Management Tools:
In addition to the core accounting functions, which include fully capable GL, AP, AR and trial balance, Total Office Manager includes an impressive collection of contractor-specific tools and features that enable advanced job and phase tracking, work order management, equipment costing and tracking of actual versus estimated costs. It also maintains service and maintenance histories for equipment, offers asset management, credit card processing, payroll with direct deposit, contact management, check writing, sales and use tax compliance, and credit card processing.

Other really cool and useful tools in Total Office Manager include a call management system that integrates with the contact management functions (providing text versions of voicemails), call monitoring and advanced caller ID that instantly brings up a customer's records, allowing the user to immediately see their job information, service records, billing histories and other vital data. It also works with the built-in marketing system for tracking advertising results. Another part of the communications system provides "while you were out" notes that alert a user to calls or events they might have missed.

The program's scheduling and dispatch features are also remarkably useful,

also integrates with Microsoft MapPoint, allowing users in the office to instantly send map directions to technicians in the field.

Reporting:
Total Office Manager includes hundreds of prebuilt report options that can be customized using the built-in report writer and saved in batches and groups. The system also produces industry-specific reports, and can generate forms 1099 and W-2. All reports can be viewed on-screen, emailed or output into multiple file formats, including Word, Excel, HTML, PDF, Crystal Reports and ODBC. Reports are accessible from the various Workflow Navigator screens or from the comprehensive
Reports Navigator.

Import/Export/Integration:
Total Office Manager offers exceptional integration between all of its modules and productivity tools, including the communications features that help track client calls and bring up their histories. The system allows import of QuickBooks, Excel, CSV, Access and text files, and can export into similar formats. The program offers wireless functions for dispatch and data sharing, as well as integration with the MapPoint system.

Support & Training:
Total Office Manager provides an intuitive workflow-based interface that should simplify processes for most users, while the program's built-in Help system provides right-click menus and guidance throughout all tasks. The company's website includes user forums, FAQs, a knowledgebase, the ability to ask questions, and access to training videos. Support packages start at $500 per year.

Relative Value:
Total Office Manager is exceptionally designed and offers a great feature set

for professional service contractors, particularly those with extensive dispatch

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