★★★★☆ FIRM USER EXPERIENCE
★★★★★ CLIENT-SIDE INTERFACE
★★★★★ PORTAL CAPABILITIES
★★★★★ TECHNICAL ASPECTS
★★★★★ HELP/SUPPORT

888-667-8440

www.OfficeToolsPro.com

2012 Overall Rating 4.75

Best Fit

Firms using or considering the Office Tools Professional Practice Management 2011 system, who want to provide user-friendly portals to clients.

Strengths

- Tight integration with Practice Management 2011 system
- Project management and file sharing
- Built-in client communication tools
- Customizable firm branding
- Good integration with outside programs

Potential Limitations

Management 2011 System. With the firm-side view of portal information sent directly into the larger system, the portals are easy to manage and use. Likewise, the client-side view of the web portals are uncomplicated and offer good sharing, organization and messaging tools. The portals are available in a $360 per year Lite version, which includes the core file uploading and sharing for the firm and client, while the $720 Full Portals system adds client messaging, invoicing, payment, status update features and email marketing functions. To retain files on the portal for more than 30 days, the full-year retention add-on is $100.

Firm User Experience 4.5

Client User Experience 5

Portal Capabilities 4.75

Technical Aspects 4.75

Help/Support 4.75

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.