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DOCUMENT MANAGEMENT

Office Tools Professional — Client Portal

Isaac M. O'Bannon • Dec. 02, 2011

Office Tools Professional — Client Portal

2012 OVERALL RATING ★★★★★



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

- Requires use of the Practice Management 2011 system

Summary & Pricing

Office Tools Professional consistently receives high scores in our annual reviews, and the introduction of the new Client Portals is an excellent extension of the Practice Management 2011 system. With the firm-side view of portal information built 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

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