www.officetoolspro.com

Office Tools Pro (OTP) distinguishes itself in this market by offering an integrated solution that includes document storage, contact management, time tracking, billing, project tracking and more.

Core Functionality

OTP is designed as an all-in-one solution, providing direct integration with the applications listed above, and they are all accessible from a single screen. The document storage component organizes documents by client, filename, year, project, category and assigned staff. The files are stored as native Windows Explorer files with OTP serving as a front-end file management application. The current version does not offer a print driver, but there will be one in the next release. 4

Integration

As described above, the integration within the OTP applications is second to none. In addition, the client list can be synchronized with Lacerate, QuickBooks and Outlook. Integration with MS Office is facilitated by launching the application from within OTP and defining the file indexing metadata at the time the document is created. You can send a PDF file directly to OTP from within Acrobat by launching a dialogue window to enter the index values. The same applies to MS Office applications as an alternative to the method described previously.

E-mail is directly integrated into the OTP interface. Files can be emailed individually or in bulk. Incoming e-mails are moved into the DM via drag and drop, or from the "Send To" button. You can scan documents in TIFF format directly with a TWAIN-compliant scanner. 4

Advanced Functionality

4.25

Summary & Pricing

If you're looking for a complete, easy-to-use practice management solution that includes an integrated document storage application, Office Tools Pro is a good choice. Pricing is $500 for a single user; a five-user system is $1,500 and $4,000 for 20 users. The optional portal module is priced starting at $300 per year for 5GB of storage.

2010 Overall Rating 4

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.