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## Company Overview

Serving the accounting profession for over 10 years, Office Tools Professional is a proud developer of the best practice management software. Receiving many accolades as the best solution for the small to mid-size firm, *Practice Management Software* has become the Accountant's choice.

In our culture it's all about resources. We recognize that to really serve our profession, we need to provide the necessary resources to our users. These resources are not limited to our software but include an annual Practice Management conference and publication.

The *Practice Management Conference* and User Training is a great opportunity to learn how to use all *Practice Management Software* features. Every attendee will receive training and a chance to network with other professionals, sharing common problems and exploring new solutions in a round table format and panel discussions.

*My Office Today* is a publication that specifically targets small business owners, who feel isolated and lack the resources bigger firms have. *My Office Today* focuses on relevant topics that are released on our website in blog, video and print format.

## Products

As a leader in small office software, we focus on developing software with tools that solve specific problems for the small firm. Our unique "Workflow Methodology" uses a single interface that provides access to nearly every office task and function, thus solving client, staffing and workflow problems while providing the following benefits:

- simplified management

- improved delegation

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*QuickBooks® Integration Tool* – The sharing of critical data like customers, employees, vendors and item codes, enables users to save time and resources by reducing the chance of data-entry errors and eliminating duplicate entries between these programs. The export time cards option allows you to create payroll for your staff and bill your clients. Utilize all the workflow benefits including billing and tracking A/R in *Practice Management Software*, taking advantage of incredible reporting and metrics, and then export invoices and payments to QuickBooks.

*Microsoft® Outlook Integration Tool* – Integrate Microsoft Outlook calendars, contacts and tasks from *Practice Management Software* schedules, contacts and tasks. Sync in real time all information. Bring in Outlook Email for review, reading and storing in the document management system. This feature works with Outlook and Exchange.

*Lacerte® Integration Tool* – Import your data from Lacerte or sync it with your existing contacts. Enter new contacts in Lacerte and import them with any changed contacts into *Practice Management Software*. Any changes to a contacts' information can be sent from *Practice Management Software* to Lacerte. Choose which method works best. You can also transfer over spouse, dependents, partners and other related records. No more double entry! Enter data only once.

Additional integrations available:

- Microsoft® Excel Data Import Tool
- Adobe Acrobat® Toolbar Add-on
- Microsoft® Office Toolbar Add-on
- Laser App®
- Dymo® Label Printer Integration

- Google Maps® Integration

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Office Tools Professional's success and growth is built upon exceptional client care. Professional support personnel are available during regular business hours at no charge to end users. We pride ourselves on having a courteous representative answer your questions directly, without having to wait for a call back. Superior customer support has allowed us to achieve a 95 percent customer retention year after year. We offer our software free of charge for 30 days because we believe in our "Try before you buy" policy. We are confident you will agree.

## **Office Tools Professional**

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**Year Founded:** 1997

**PRICE:** \$500/First User, \$275/additional users

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

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