Gavel & Gown Software Inc. — Credenza Software

800-472-2289

www.credenzasoft.com

From the June 2013 review of practice management systems.

Best Firm Fit: Business professionals currently reliant on Microsoft Outlook for tracking client appointments, tasks and projects.

Strengths

- Free version available for general practice management functions
- Built on top of familiar Microsoft Outlook interface
- Inexpensive practice management solution

Potential Limitations

- Larger organizations may require more features and customization options
- Project tracking not as complete as competitors

Credenza Pro provides enhanced organization and functionality for Microsoft Outlook. Built for business professionals tracking clients or projects, Credenza Pro is a cost effective practice management solution. Credenza Pro builds upon the familiar look and feel of Microsoft Outlook and brings consistent workflow to users. Two versions of the solution are currently available; a free version with reduced functionality and a full featured paid version. This review will focus solely on the full featured paid version.

BASIC SYSTEM FUNCTIONS: 5 Stars

Credenza Pro is an add-on practice management software solution and runs as a

in process and should be available mid-2013.

Microsoft Outlook items, such as email, tasks and calendar appointments are assigned to client folders through a button added to the bottom of each item. By clicking this button, users have access to a tab driven navigation dialog box that provides a central storage location for all Microsoft Outlook items. Users also have the option to categorize client data and control any data sharing options.

Similar to Microsoft Outlook in-box rules, Credenza Pro provides automation tools to ensure as new emails are received they are categorized and filed automatically. Automation may also take place upon certain events taking place, such as after time is posted to the email. New for the current release is the ability to track phone calls. Users now have the option to add all participants on the call as well as post any related time data.

TIME MANAGEMENT CAPABILITIES: 4 Stars

Credenza Pro adds options to each task item within Microsoft Outlook. These additional options allow users to assign these items to clients and to post any related time and expense items. Options are also available so users can glance at their email inbox and quickly locate any emails not currently assigned any time data.

Time Entry Assistant is a feature that finds all Microsoft Outlook items and looks for items that do not have any time data associated with them. Users may filter this by day to narrow the search data results. Additionally, timers are available for use. All time and expense data posted is immediately available for invoicing.

INVOICING FUNCTIONS: 4.5 Stars

Credenza Pro provides full invoice and collection capabilities. All posted time and expense items are immediately available for invoicing. Invoices are done through

templates, but users do have the option for customizing logo placement and task

generate statements and late payment email reminders. All billing information contained within Credenza Pro may be exported to QuickBooks to keep firm accounting records current.

MANAGEMENT FEATURES: 4 Stars

Credenza Pro builds upon the Microsoft Outlook calendar and scheduling functions. Users may setup teams and share calendar appointments and client data. When setting up teams, one user is designated as administrator and invites other users to share their respective calendars and client data. All shared data is processed through the Internet via the Microsoft Azure platform and does not require Microsoft Exchange.

Client data may be marked as private to prevent sharing with other users. Also, users not included in the team will be unable to view any client data. Users may further restrict access to client data by requiring passwords.

Credenza Pro includes a number of reports that cover client files, time sheets, phone calls and billing. Reports are generated through the included SQL reporting engine. Reports may be printed, published to PDF or exported to Microsoft Excel. Currently only a handful of reports are provided and no custom reports may be generated. Users do have the option, however, of exporting data through a data export wizard to further customize reports in Microsoft Excel.

INTEGRATION & DATA MANAGEMENT: 4.5 Stars

Credenza Pro is built on top of the Microsoft Outlook interface and is fully integrated. The solution is designed to further enhance the commonly used tasks in Microsoft Outlook. Credenza Pro includes pre-set templates for QuickBooks, Timeslips and PCLaw data export. These templates are formatted to directly import data to the respective systems for further accounting and reporting needs. Custom templates

may be setup for other accounting systems through an available data template export

HELP/SUPPORT: 4.75 Stars

All help and support options for Credenza Pro are included with the monthly licensing fee. Through the company website, users have immediate access to frequently asked questions and a knowledgebase that is frequently updated. Tutorial videos are also provided and guide users through general tasks and interface navigation. Credenza Pro subscribers also have access to unlimited phone and email support.

Credenza Pro checks for updates upon starting Microsoft Outlook. If any updates are available, they are automatically downloaded and installed. Users will only be prompted if user interaction is required. All updates and feature enhancements are included with the monthly subscription licensing.

PRICING & SUMMARY

Credenza Pro is an add-on solution to Microsoft Outlook that integrates practice management tools into email, contacts, tasks and calendar appointments. The installation provides additional functions and menu items to Microsoft Outlook but does not remove any features. Since the solution is built on top of Microsoft Outlook, the additional features do not disrupt the end-users preferred current workflow.

Credenza Pro is priced at $24.95 per user, per month and includes all features, updates and technical support. A free version is available to provide general practice management functions, but does not include invoicing, calendar sharing or technical support.

2013 Overall Rating: 4.5 Stars

Firm Management • Payroll

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us