

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

Office Tools Professional Practice Management 2013

661-794-2220

www.officetoolspro.com

From the [July 2013 Review of Document Storage](#) systems.

Best Firm Fit: Firms with 100 or fewer users who want to combine practice management, document management, workflow management, and CRM capabilities into a single, integrated application. This application is particularly useful for sharing client data within client service teams so every team member has all of the latest information on client projects.

Strengths

- Product is one of the few applications which combines practice management, document management, time & billing, project management, in-firm instant messaging, and customer relationship management into a single integrated application.
- Very effective tool for organizations with the discipline to implement customer relationship management and automated workflow tracking.
- Includes tools for document creation and follow up on review notes. An Adobe Acrobat plug-in allows Acrobat Standard users to mark-up and save files directly into Practice Management 2013.
- The product's Outlook Sync will automatically move inbound and outbound client e-mails to the proper folders based on the e-mail address of the sender. And now offers synchronization with Microsoft Outlook 2007 and 2010.

Potential Limitations

- May not be the best fit for those who need only document storage, and do not wish

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

for 2013, and will include the ability to digitally sign documents in a future update.

Documents can be added to the application by dragging and dropping the file into the application or by printing the document using the product's new PDF printer. Time can also be tracked directly from documents and these documents can be associated with specific workflow tasks.

The application's document indexing permit firms to store documents in folders by contact, by contact and year, or by contact and project. Users can also index documents with other data, including customizable document categories, projects, staff member, and year.

Practice Management 2013 includes tools for tracking document archival/destruction dates, and documents can be archived to a separate location. Invoices prepared in the practice management portion of the application are archived to the client's document storage area. The product's search tool is effective, but only works with the document name and other file-level information. The application does not provide OCR and file search capabilities to find data within the body of stored documents.

Optional add-on tools are available which allow users to synchronize data with common applications, including Intuit Lacerte, Intuit ProFile (Canada), Laser App, QuickBooks (for general ledger and firm payroll), Intuit Demandforce, Outlook and many others. The application will also sync calendar information and contacts from the practice management portion of the software to and from Microsoft Outlook.

Integrated client portals are an optional service which can be used from within the application.

Although the application is designed to be run as a locally installed application on a firm's internal network, the product can be run as a hosted application. Many

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

The application is priced at \$600 for a single user and \$1,600 for a five user package. Discounts are available for tax-season only users and other limited use profiles. Annual maintenance and support is priced at 80% of the initial purchase price, and includes all updates and support. Hosted portals, Training and Consultation along with a number of other add-ins which facilitate data exchange with other applications are available, and are priced separately.

2013 Ratings:

Core Product Functions/Features: 4.75 Stars

Integration/Data Export/Import: 4.5 Stars

Advanced Functionality: 4.75 Stars

2013 Overall Rating: 4.75 Stars

Firm Management • Technology

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.