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Redesigned Office Tools Pro Offers New Interface and Features

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Office Tools Pro has been a popular choice for professional service firms for many years, including tax and accounting practices and legal professionals. The system includes integration with QuickBooks for AR and invoicing functions and syncing with Microsoft Outlook for full contact management capabilities. The program was completely redesigned for 2010 using the .NET platform, which gives it much greater customization options, an enhanced and more intuitive user interface and streamlined workflow processes. Office Tools Pro 2010 was not available for full evaluation at the time we were reviewing practice management systems, but will be by mid-summer. We were, however, able to preview some of the new features.

Key among enhancements for 2010 is a newly designed interface that starts with a single-screen live "active workspace," which is similar to a dashboard, but provides full functionality directly from the panels, as opposed to many dashboards that simply provide summaries and then link to the module with which it is associated. By providing a single-screen interface, users remain in the same workscreen, with quick access to all other areas of the program. This interface is comprised of four sections: the contact list, company header and sections, the main work area, and the staff activity list.

Office Tools Pro can be used to manage any number of business entities and any number of staff, with features that include contact management, scheduling, time and expense tracking and billing, and invoicing. Time entry features include multiple methods, including timers and multi-staff spreadsheet entries with approvals-based

workflow processes, while basic project management functions are also available.

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Office Tools Professional provides more than 80 customizable standard reports, including client lists, AR, expenses, WIPs, budgets, schedules, and time and billing summaries by client, staff or project. Reports can be output to PDF, Excel and Word.

Office Tools Professional 2010 uses the latest technology to streamline practice management, pulling all activities together into an easy-to-use system that offers intuitive design and great workflow for smaller practices. Pricing starts at \$500 for a single-user system; \$1,500 for five users.

Technology

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