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# Office Tools Professional — Practice Management Software

Dustin Wheeler • Sep. 05, 2014

# Office Tools Professional — Practice Management Software

2011 OVERALL RATING ★★☆☆☆



BASIC SYSTEM FUNCTIONS



TIME MANAGEMENT CAPABILITIES



INVOICING FUNCTIONS



MANAGEMENT FEATURES



INTEGRATION & DATA MANAGEMENT



HELP/SUPPORT

661-951-9200

[www.officetoolspro.com](http://www.officetoolspro.com)

2011 Overall Rating 4.5

## Best Firm Fit

Small to mid-sized firms not currently using a completely integrated suite of tax and accounting products.

# Strengths

- Integration with Lacerte, QuickBooks & Outlook
- Interface is easy to navigate & is focused on the client
- Strong contact management capabilities, including social media
- The only practice management software reviewed with its own built-in document management features

## Potential Limitations

- May not have sufficient reporting capabilities for very large? firms
- No ability to enter time remotely (except for remotely accessing the computer with the program and data)
- Does not track accruable employee benefits

## Summary & Pricing

Office Tools Professional is ideal for smaller practices that could benefit from data synchronization with Lacerte Tax and QuickBooks. The strong project management and workflow tools, combined with social media and CRM functionality make this tool an excellent choice for small to mid-sized firms who want to make it easier for junior team members to effectively communicate with clients.

The annual cost of a single-user license is \$500; additional users may be added for \$300 each. Package discounts are available for five, 10, 15 and 20 users. Client portals, credit card processing, and productivity tools such as syncing with other software can be added for additional fees.

### Product Delivery Methods

On-Premises

SaaS (client portal products)

Hosted by Vendor (currently hosted by Right Networks, Cloud 9 & CPAASP)

**Basic System Functions – 4.75**

**Time Management Capabilities – 4.5**

**Invoicing Functions – 4.5**

**Management Features – 4.25**

**Integration & Data Management – 4.75**

**Help/Support – 4.75**

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