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Mar. 14, 2016



[\[Read more on CRM for accounting firms.\]](#)

Office Tools WorkSpace offers extensive practice management, workflow and client collaboration tools, but also includes strong CRM capabilities. An optional online solution provides a portal for secure online document sharing, invoicing, receiving payments, scheduling, and staff timesheets. WorkSpace is flexible and easy to use, allowing it to be a good fit for any size of firm.

Strengths

- Broad practice management and workflow capabilities
- Scalable to firms of any size
- Optional cloud-based system for client portals, invoicing, payments and other functions
- Add-Ons for integration between accounting and other systems

Potential Limitations

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The client list is instantly available and includes a quick search tool, while client contact screens in WorkSpace offer basic and custom data fields that can be used to track virtually any type of information. When a client is selected, the interface includes a staff activity list that shows which staff members are assigned to the client, along with associated client interactions and activity, such as emails, phone calls, appointments, and a to-do list.

Office Tools Workspace directly integrates with Microsoft Outlook for email, calendar and contact information, automatically syncing the data between the two systems so there won't be disparate contact data. Document management functions include deep archiving and search functions, with files assigned to client companies and/or individual contacts, as well as firm staff members. From within the system's Projects tab, users can quickly access client billing histories and WIPs, generate invoices, view assigned staff and even log task time and phone calls.

When also using the WorkSpace Online portals, firm staff can easily share documents and collaborate with clients. The client-side of the portals can be designed to match the firm's website and branding. Clients access the portal via their normal web browser (usually by clicking a link and logging in). The portal functions also offer credit card payment acceptance from clients and messaging.

Summary & Pricing

All of the applications within Office Tools WorkSpace, and the optional online portals, provide excellent integration. Pricing is based on the number of users or groups, and starts at \$700 per year. The online portals solution also starts at \$700 per year. Pricing discounts are available for multiple users.

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