

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

FIRM MANAGEMENT

2016 Review of Office Tools – Practice Management Workspace

Practice Management Workspace from Office Tools is a time and billing software designed for small to mid-sized firms. The product uses a simplified user entry screen and offers excellent client management tools along with an intuitive time and billing ...

Mary Girsch-Bock • Apr. 23, 2016



From the [2016 Reviews of Practice Management Systems](#).

Best Fit: A great fit for small to mid-sized firms that are looking for an easily navigated time and billing software solution that can be accessed from anywhere. Practice Management Workspace consolidates information into a single database, helping to eliminate duplicate data entry between programs.

Strengths

- Well-suited for small to mid-sized accounting firms

- Excellent scheduling component included in product
- Client portal is available
- Offers excellent integration capability with a variety of third-party applications
- Offers two versions of the product

Potential Limitations

- Not well-suited for very large firms

Practice Management Workspace from Office Tools is a time and billing software designed for small to mid-sized firms. The product uses a simplified user entry screen and offers excellent client management tools along with an intuitive time and billing interface that makes it easy to track time accurately, and process invoices on a timely basis.

Basic System Functions – 4.75 Stars

Practice Management Workspace offers a single screen entry system, with the main work space at the top of the screen, and the activity list at the bottom. Users can easily access clients from the detailed list to the left of the workspace screen, and the use of tabs at the top makes it easy to access detailed information in a variety of categories including Notes, To-Do's, Calls, Schedule, Projects, Time, Billing, and Documents. The ability to access multiple system features from a single interface with a single click ensures highly efficient system navigation, with the added bonus of little training time needed.

A menu bar at the top of the screen offers access to other functions within the system, including File, Edit, Contacts, Reports, Setup, Hot Keys, and Help functionality. The interface is intuitive, and can provide as much or as little detail as desired.

Integration with popular programs such as QuickBooks and Lacerte Tax allow users to easily share data between applications. A document management function allows users to easily scan and attach documents to clients, and the schedule function allows managers to schedule employee time, while also tracking projects.

The scheduling feature allows users to easily manage their schedule, and the schedule, track projects, and synchronize the Practice Management Workspace Calendar with both the Client Portal and Microsoft Outlook calendars. The scheduling function also allows managers and partners to easily handle employee schedules if desired. Entering a task or appointment is completed with a single click, and managers can easily assign work from this screen, as well as schedule reminders,

assign a project or work code, and repeat to assign additional similar tasks. Users can also delete or cancel appointments from this interface as well.

The main part of the screen is where client information is viewed. This screen provides personal information on each client, as well as detailed information on all related time and billing data that has been assigned to that client. The bottom of the screen is where users can view a detailed list of all projects, assignments, documents, and other items. A drop-down field allows users to easily view other employee's schedule as well. Users can also add additional information such as appointments. Users can easily check off each task as it is completed.

Time Management 4.5 Stars

Office Tools Practice Management Workspace offers users three ways to track time; using the built in system timers, by completed a task and noting it on a timecard, or in a more traditional manner by tracking time and entering hours on the staff timesheet for all time worked on a particular project. Employees can also review a recap of hours, track related expenses and track mileage expenses as well. Clicking on the Billing function at the top of the screen provides employees with a summary of billable time, including work codes, hours, attached rate, amount, and any related expenses and mileage. Payments are easily recorded, and the system will track deposits as well. QuickBooks users can easily export billing and payment data directly into their QuickBooks files, eliminating the need for duplicate data entry.

Invoicing Functions 4.25 Stars

Office Tools Practice Management Workspace allows users to invoice projects directly from the invoicing screen if desired. Along with standard invoices, users can also create both flat rate and recurring bills, with the ability to edit existing invoice billing codes and rates, or enter any mark ups or mark downs prior to processing the invoice. Retainer fees can also be managed in the product, and the Billable Time screen provides employees with the ability to add time, delete any recorded time, use the timer to record time, and select the Invoice Now function for quick invoicing.

Management Features – 4.5 Stars

The comprehensive Scheduling feature is one of the best features of Office Tools Practice Management Workspace, which allows firms to provide their employees with the ability to manage their own schedule, as well as allowing managers and partners the ability to review and even edit the schedule as needed. The activity list,

which is an employee in-box of sorts, provides employees with a comprehensive list of things that need to get done. Activities can be set by priority, and managers can review employee lists to review assignments and keep current on employee productivity. Reporting options in Office Tools Practice Management Workspace are excellent, with billing analysis reports, staff productivity reports, or key performance indicator reporting available for management. Reports are easily customized, with the ability to choose specific report filters as needed. All system reports can be exported to Microsoft Word and Excel, delivered via email, or saved to the client portal, where they can be delivered directly to each client.

Integration & Data Management 4.5 Stars

Office Tools Practice Management Workspace offers integration with a variety of third-party applications including QuickBooks, Lacerte Tax, ProFile, and Demandforce, along with others. Any contact information updated in Practice management WorkSpace will automatically update the other applications as well, using the Microsoft Excel Importer. Practice Management Workspace also offers additional integrations with applications such as Dymo Label printers to create address and label files. Complete integration with Microsoft Office applications such as Word, Excel, and Outlook provide even more system functionality. The Microsoft Office Add-On toolbar makes it easy to save Office files directly in Practice Management Workspace, and the Adobe Add-in allows users to save any file in PDF format. A fully integrated client portal makes client communication simple, and Practice Management Workspace also offers a fully integrated Client Portal, which allows seamless communication with clients electronically. The product also syncs with QuickBooks products, including both Premier and Enterprise versions.

Help/Support/Training 4.5 Stars

Practice Management Workspace offers solid help functionality in all of its data entry screens. The website offers users a variety of tools, including FAQ's, Getting Started Guides, User Guides, and quick access to technical support. Additional product training is also available at an additional cost if desired. Premium support packages start at \$1,500 annually.

Summary and Pricing

Well suited for small to mid-sized accounting firms, Office Tools Practice Management Workspace is also available as Practice Management Workspace

Online, with both products starting at starts at \$700 for a single user license; \$3,000 for a 10-user license.

2016 Rating: 4.5 Stars

Firm Management • Practice Management • Product & Service Guide • Office Tools • Article • Practice Management • practice management software reviews • practice manager • Review

CPAPA 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.

© 2022 Firmworks, LLC. All rights reserved