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accounting firms that are in the market for a strong practice management solution that...

Mary Girsch-Bock • Dec. 18, 2017

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OfficeTools Practice Management

From the Dec. 2017 Review of Document Management & Storage Systems.

www.officetools.com

OfficeTools is a comprehensive practice management solution for accountants. Recently purchased by AbacusNext, OfficeTools is best suited for small to mid-sized accounting firms that are in the market for a strong practice management solution that also offers an excellent document management system.

OfficeTools also includes a client portal as well as integration capability with a

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categories that are included in OfficeTools or they can choose to create their own custom categories if desired.

As part of the practice management system, users can access the DMS by clicking on the Documents option on the main user interface screen. Designed to work in conjunction with the practice management application, users can easily store documents in the DMS by creating a drop folder on the desktop, which users can save documents directly to the folder, or by dragging and dropping files. Any file placed in the drop folder will automatically be imported into the DMS.

All files will be stored in the Document Management Folder. There is also The DMS also uses SubFolders, which are organized by Year, Project, and Category. Users can also create new documents when working in the DMS by simply choosing the file type, which will launch the appropriate program. Once the document is complete, users can save the document directly into the previously accessed folder.

OfficeTools also offers an optional Client Portal. Portal allows users to send documents to clients, accept payments, schedule appointments, and even accept eSignatures with an integrated tool. A new online timesheet option is available as well. Sharing documents with clients via the portal is easy, with users simply choosing the file or files they wish to share, and then clicking on the share button. Along with providing documents to clients, clients also have the option to upload files directly to the portal as needed. All documents stored in the OfficeTools DMS can also be emailed to clients or other recipients as an attachment if desired.

OfficeTools is a completely integrated practice management system that includes complete document management capability as well as integration with the add-on portal. The product has right-click access the product also offers seamless integration with Microsoft Office applications such as Word, Excel, and Outlook, and the new Microsoft Office Add-On Toolbar allows users to utilize and save files

directly in OfficeTools. The product also offers sync capability with QuickBooks,

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OfficeTools offers numerous training options, with Online, Onsite and Webinar training available.

OfficeTools offers excellent document storage and management capability for accounting firms using or planning to use OfficeTools Practice Management. The company is currently reassessing its product pricing, so those interested in the product may want to contact OfficeTools directly for current pricing.

2017 Rating 4.75 Stars

Firm Management • Technology

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